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BIRMINGHAM



Rethinking the Skies

Exploring the Social, Environmental, and
Economic Potential of eVTOLs for the UK

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Foreword



Britain is an aviation innovator. From the jet engine to the Concorde, we have consistently found new ways of using the precious resource above our heads. With technology evolving at an ever-faster rate, aviation is now at a turning point.

Drones flying between hospitals to deliver medical supplies. Electric vertical take-off and landing vehicles connecting towns and regions not always well served by existing transport links. Emergency services using uncrewed aircraft to support critical incident responses. Once the preserve of science fiction, these are now realistic and achievable opportunities.

As a member of industry and co-Chair of the Department for Transport's Future Flight Industry Group, I am encouraged by the Government's ambition to help this sector succeed. The Future of Flight has the potential to improve regional mobility, support cleaner aviation, create skilled jobs and drive economic growth across the UK.

There is much still to do. Integrating new aircraft alongside existing ones is a complex challenge and, as a safety-critical industry, one that has no margin for error. This remains one of the greatest opportunities in aviation since the dawn of the jet age, and this report is a welcome step forward in understanding how we realise it safely and how we inspire the public's trust.

A handwritten signature in black ink, consisting of several fluid, connected strokes.

Andrew Sage
Director, Safety Transformation. NATS
Co-chair of UK Future Flight Industry Group (FFIG)



Chapter 1: Introduction

UK aviation is entering a period of rapid change, with both government and industry working towards the introduction and roll out of new air vehicles such as drones and passenger carrying electric vertical take-off and landing (eVTOL) aircraft. While UK publics are already quite familiar with drones, eVTOLs remain less well known. These are new types of battery-powered aircraft that take off vertically, typically envisioned as transporting small groups of around 4-6 passengers on short-hop trips or longer journeys of up to 150 miles. eVTOLs are on the cusp of being introduced nationally and have the potential to offer real benefits for the country: regional connectivity, the provision of greener short-haul flights, as well as new ways of delivering public services, economic benefits and jobs. Indeed, the UK is positioning itself to become 'a world leader of this nascent sector.'¹

The UK government has been working with the Civil Aviation Authority (CAA), UK Research and Innovation (UKRI) and the emerging eVTOL industry to set ambitious targets for the successful integration of a new distributed aviation system that includes drones and eVTOLs. The Department for Transport's 2024 Future of Flight Action Plan publicly shared a commitment for routine piloted eVTOL flight operations by 2028². The CAA has similarly stated the aim of having 'in place by end-2028 a clear regulatory framework and operational systems that allow initial commercial eVTOL flights in the UK.'³

Core to ongoing discussions are the ways in which to best integrate an innovative distributed aviation system that meets public desirability for eVTOL services, whilst realising their wider potential socio-economic benefits.

In collaboration with the Department for Transport, and through the UKRI Future Flight Challenge programme between July 2021 and March 2026, the University of Birmingham has delivered a social science research programme that assessed UK public and key stakeholders' perceptions and attitudes towards eVTOL technologies, systems and services. Since March 2022 we have engaged with over 12,000 members of the public from across the UK about their hopes, concerns and expectations, as the future of flight has transitioned from speculative future vision to imminent reality.

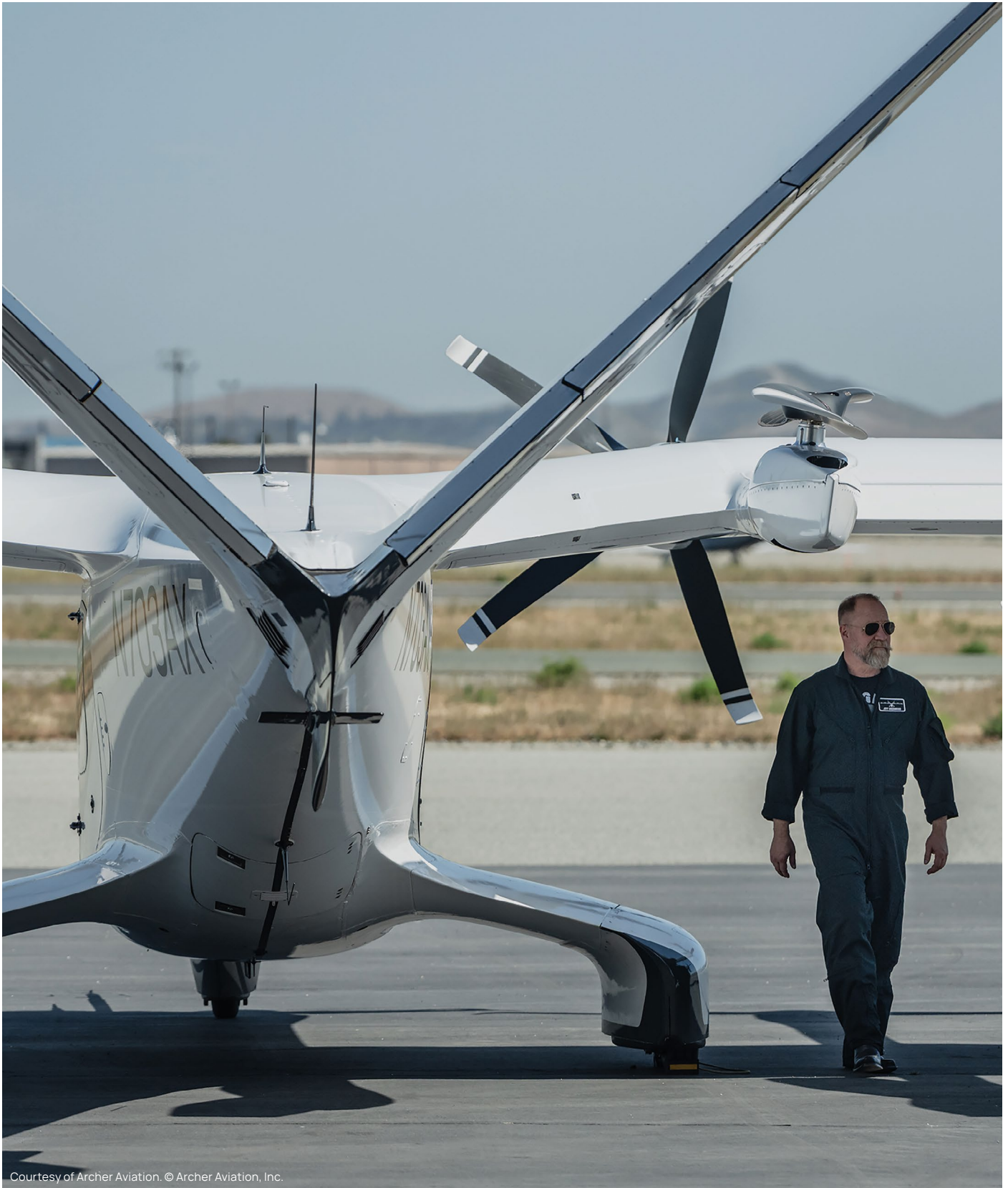
This has included:

- Two in-depth deliberative dialogues with a UK wide cross-section of members of the public
- Nationally representative surveys for the UK, Scotland, and Wales, as well as a regionally representative survey for the Highlands and Islands
- Public and community engagement including focus groups and semi-structured interviews with a cross section of members of the public and stakeholder groups across the UK

Our research and engagement programme to better understand the societal risks and opportunities for future flight technologies was commended by Dame Chi Onwurah MP, the Chair of the Science, Innovation and Technology Select Committee, at the launch of our 2025 report in the House of Commons.⁴ Speaking at an event attended by a number of our public research participants, Dame Onwurah reflected on the value of citizen engagement in technology policy and highlighted the importance of ensuring that public perspectives help inform decision-making around emerging technologies. She noted that many constituents feel technology and technological advancements happen to them, whereas participants in the Future Flight social research programme had been given a meaningful opportunity to help shape discussions around future policy and innovation.

This work is indicative of the UK government's leadership and investment in this innovation ecosystem as well as the openness of the emerging Future of Flight industry to better understand public attitudes and perspectives and where possible deliver innovative aviation technologies such as eVTOLs, in ways that best serve and benefit communities across the UK. With that in mind, this report outlines what the public rationale and appetite is for developing a distributed aviation system in the UK that includes and integrates eVTOL technologies, systems, and services.

Yet public support should not be assumed. Without real public engagement there is a significant risk of these technologies



Courtesy of Archer Aviation. © Archer Aviation, Inc.

being rolled out in ways which damage public trust. Our research demonstrates that support for eVTOLs is conditional: people want these technologies to address real social or transport needs, and desire services that are affordable and designed in a fair and equitable way. Absent these conditions, support falls away.

Accordingly, to build a thriving and economically viable UK eVTOL industry, both industry actors and policymakers must first

understand the expectations and concerns of the public and then design these systems with the public's views in mind. Given the timelines that the government is working towards, the window for building public trust is currently open but will soon narrow as services are designed and implemented. Delivering on the UK government's 2028 commitment, and doing so before that window closes, requires robust evidence of what the public actually thinks; this report provides that evidence.

Chapter 2:

Current challenges in

UK transport systems

Integrated transport connectivity is a strategic priority for this government to drive economic growth and enable communities to grow and thrive⁵. This is because current systems face a range of challenges, such as uneven regional connectivity, transport deserts, and car dependency, all of which carry significant social and economic impacts.

There are highly variable levels of connectivity across regions in England and Wales⁶. This is in part down to geography, but also a result of historical legacies of the development of our road and rail systems. There are a range of ways that this impacts not only on journeys but also access to goods, services and the associated opportunities these bring across the UK. It is not only remote or rural communities that are impacted upon. In some smaller cities and towns there is insufficient road access into urban centres or a lack of rail infrastructure. Across parts of the South-East and beyond there are limitations due to the radial nature of our transport systems which often mean journeys have to be indirectly routed into London and out again. In parts of Wales, Scotland, the South-West and the North of England there are large swaths of mountains, moors or dales that have limited road or rail routes. A key disadvantage of addressing this variable connectivity is that we cannot just pick up and move a road or rail network and every decision about new on-ground infrastructure comes with significant economic, social and environmental impacts or trade-offs.

Connectivity across the UK is heavily car dependent. Over 50% of UK publics we surveyed use public transport less than once a week, whereas most of our participants (65%) use petrol or diesel cars or vans at least once a week or more⁷. Private vehicles are the 'equaliser' between urban, suburban and rural connectivity, with 'hot spots' for

active travel or public transport modes in urban centres⁸. Differences in connectivity risks creating or entrenching 'transport deserts'; these are areas that are inadequately served by transport in such a way that limits choices and opportunities for the people who live there⁹. These transport-related inequalities have the potential to lead to both societal and economic growth impacts.

Domestic aviation is part of the regional connectivity challenge. We currently have 50 regional airports serving local communities in the UK¹⁰. Public Service Obligation (PSO) routes provide a minimum level of air service in areas where this is socially and economically vital, with air services subsidised by national and devolved governments. PSO routes are contingent on local or national government subsidy and can be withdrawn¹¹. Given wider benefits to industries such as tourism or hospitality, poorer regional air connectivity can have effects across multiple and diverse socio-economic groupings, not just passengers who are using flights. Other shared modes such as ferries, which provide vital connectivity for our island-based populations as well as businesses, visitors or tourists, likewise face investment challenges where infrastructure and fleets require upgrading at significant public expense¹².

People's experiences of UK transport systems across the country are therefore often shaped by a range of intersecting factors, which are unevenly distributed across different groups and places. Transport related social exclusion refers to barriers to transport that prevent individuals from accessing opportunities and services or otherwise participating in society¹³. Transport related social exclusion can for example prevent individuals and communities from accessing essential services, employment, or education due to limitations in transport availability, affordability, accessibility, or reliability.

Importantly, these barriers are not only physical, or economic, but can also be social and cultural. For example, fears around personal safety and harassment can dictate which transport modes and times of travel are accessible to women, or members of some marginalised groups. As these barriers are not evenly distributed and often reflect broader spatial and socio-economic inequalities, it can mean that transport disadvantage reinforces existing patterns of regional inequality and social exclusion.

Overall accessibility of UK public transport services remains a persistent and uneven issue, contributing to a range of day-to-day difficulties publics experience with UK transport systems. People living with disabilities face challenges with public transport where the design of current infrastructure (e.g. rail, buses) or the functionality of digital systems (e.g. ticketing platforms, journey planners and service information) can impact the experience of these passengers, in some instances making journeys prohibitively difficult, time-consuming, expensive or even impractical. These challenges are not limited to a single mode. They are also present within the existing aviation system, where disabled passengers continue to report systemic barriers across commercial services, including issues relating to assistance provision, boarding processes,



Courtesy of BETA Technologies. © BETA Technologies, Inc.

BETA

“BETA Technologies is taking a stepwise approach to Advanced Air Mobility, entering the market with an eCTOL-then-eVTOL product strategy, and leading with cargo variants before launching passenger operations. Our recent eCTOL demonstrations with Loganair Limited and the Royal Mail prove that fully electric, zero-emissions aircraft can fly safely and reliably in the UK. This hands-on collaboration gained the support of operators, airports, and regulators and validated the business case for short-haul cargo and regional passenger flights. That demand signal extends to off-airport operations like moving time-sensitive diagnostics and pharmaceuticals between hospitals and scheduled patient transfers from the outermost islands. BETA's aircraft can help solve the biggest challenge in modern transportation, for the UK and beyond: increasing access, offering connectivity, and improving quality of life - all while reducing our carbon footprint.”



Courtesy of Vertical Aerospace. © Vertical Aerospace, Inc.

Vertical Aerospace

“Vertical Aerospace is the UK and Europe's leading eVTOL manufacturer, developing Valo from its headquarters in Bristol. As the UK's only home-grown eVTOL OEM pursuing certification, Vertical is central to whether the UK captures the industrial and economic value of advanced air mobility.

Working with partners such as Bristow, Vertical is developing pathways to real-world operations across airport connections, regional mobility, logistics and public-service support. These services will scale over time, but the use cases already show how eVTOL and hybrid-electric aircraft can strengthen connectivity and resilience across the UK.

Vertical's success would create thousands of skilled jobs outside London, support a new aerospace battery cluster, attract investment into regional supply chains, and place the UK at the forefront of the next generation of aviation.”

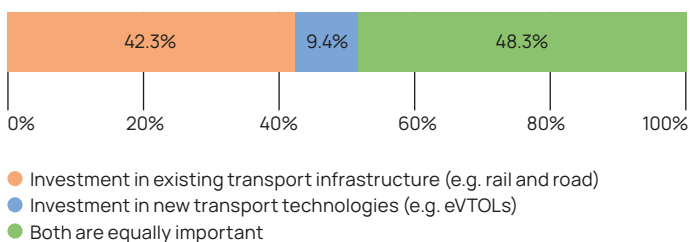
and consistency of service standards across operators and airports¹⁴. More recently there has begun to be a wider recognition that some hidden disabilities are not strongly advocated, accommodated or accounted for within current UK public transport systems. For example, people with visual or hearing impairments, neurodivergent conditions, or sensory processing differences, where environmental factors such as noise, lighting, crowding and other spatial factors alongside information complexity can significantly and differentially affect the usability of transport services.

Emerging new transport technologies such as eVTOLs offer a further way to think about or approach these issues in relation to connectivity, social inclusion and accessibility. Our research explored whether and under what conditions, eVTOLs - if carefully integrated with existing transport systems - might in the future support the development of a safe, sustainable, affordable and accessible transport system that better supports people, public sector services, and businesses across the UK.

Chapter 3: Public hopes, expectations and priorities for UK transport

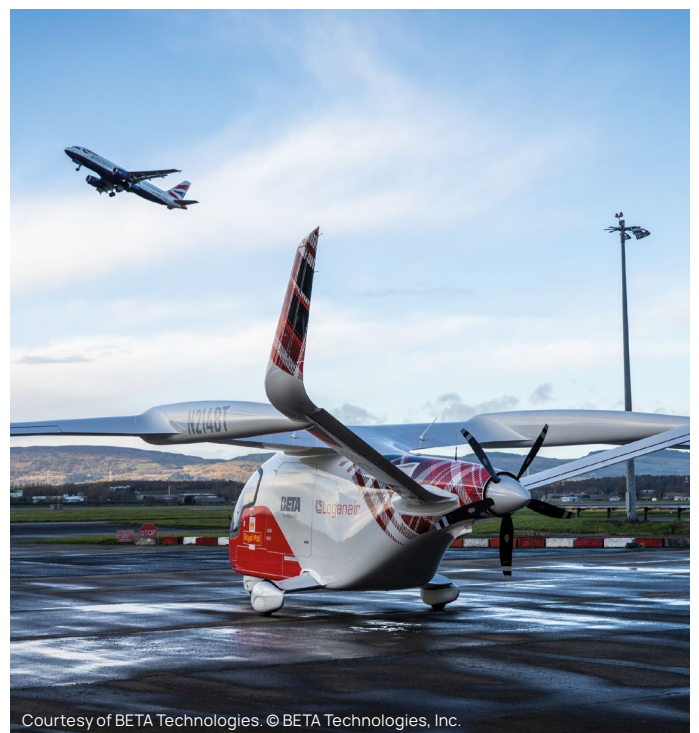
Our research into public hopes and expectations for innovative aviation technologies took place at a time of wider perceptual and attitudinal change towards the ways we live and work in the UK, and how our lives should be governed. Most publics support government investments in better transport systems and actions that improve the provision of electric transportation across various modes. For example, 70% of publics we surveyed agree that the government should do more to make electric cars affordable, and the majority would support legislation replacing public transport vehicles (55%) and freight vehicles (58%) with electric vehicles of the same type.¹⁵ Our data (Figure 1) shows that over the next ten years, whilst some UK publics want to prioritise investment in existing infrastructure (e.g. road and rail), slightly more of the UK public want to prioritise investment in both existing transport infrastructure and new transport technologies (e.g. eVTOLs). This is likely to change in the next couple of years as awareness levels around eVTOLs and how they might operate in the UK increase.

Figure 1: Where should transport development and investment be prioritised



Q1. Thinking about transport development and investment in the UK, which of the following do you think is a higher priority over the next 10 years? [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

As Figure 2 shows, government investment in the electrification of transport and improving connectivity is important to the public as part of a wider multi-modal integrated green transport approach. UK publics recognise the need for increased investment in both existing and new forms of transport infrastructure and services. Though our research shows that 49% of UK publics think as a society we should be flying less often, more than half (58%) supported the future roll out of electric or hydrogen powered flights within the UK.



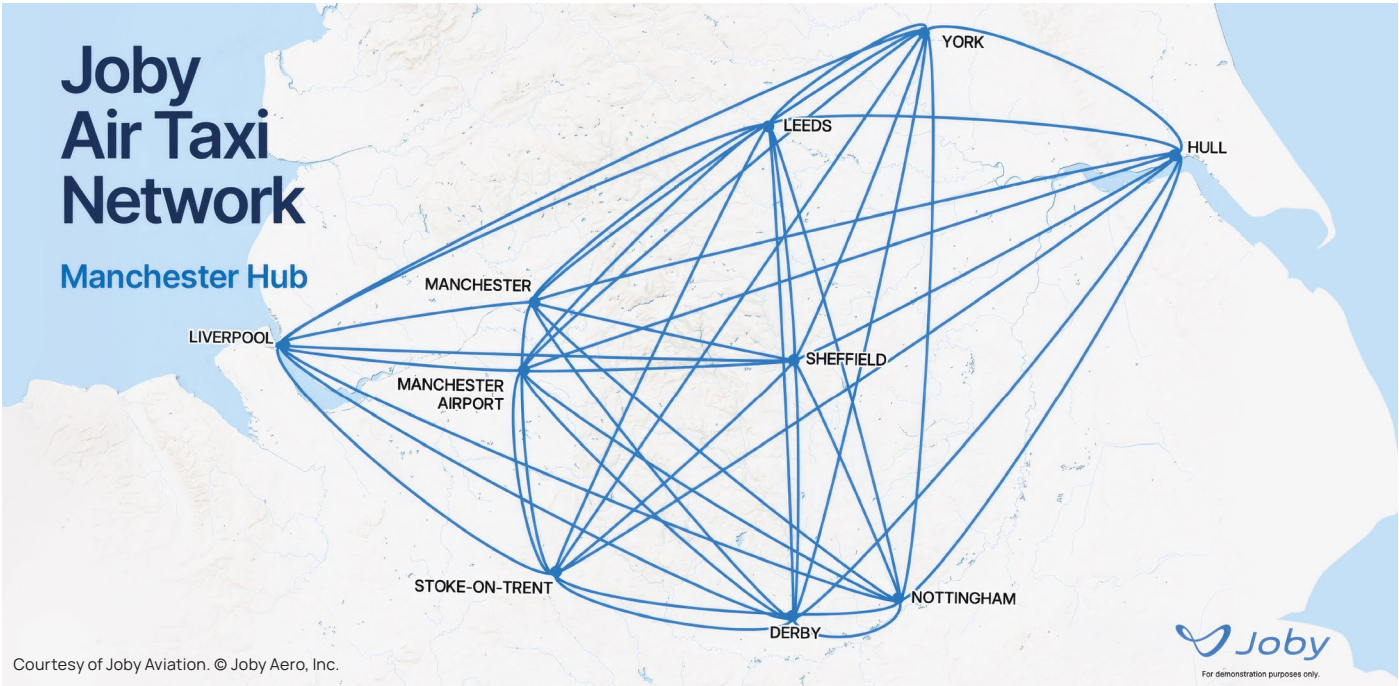
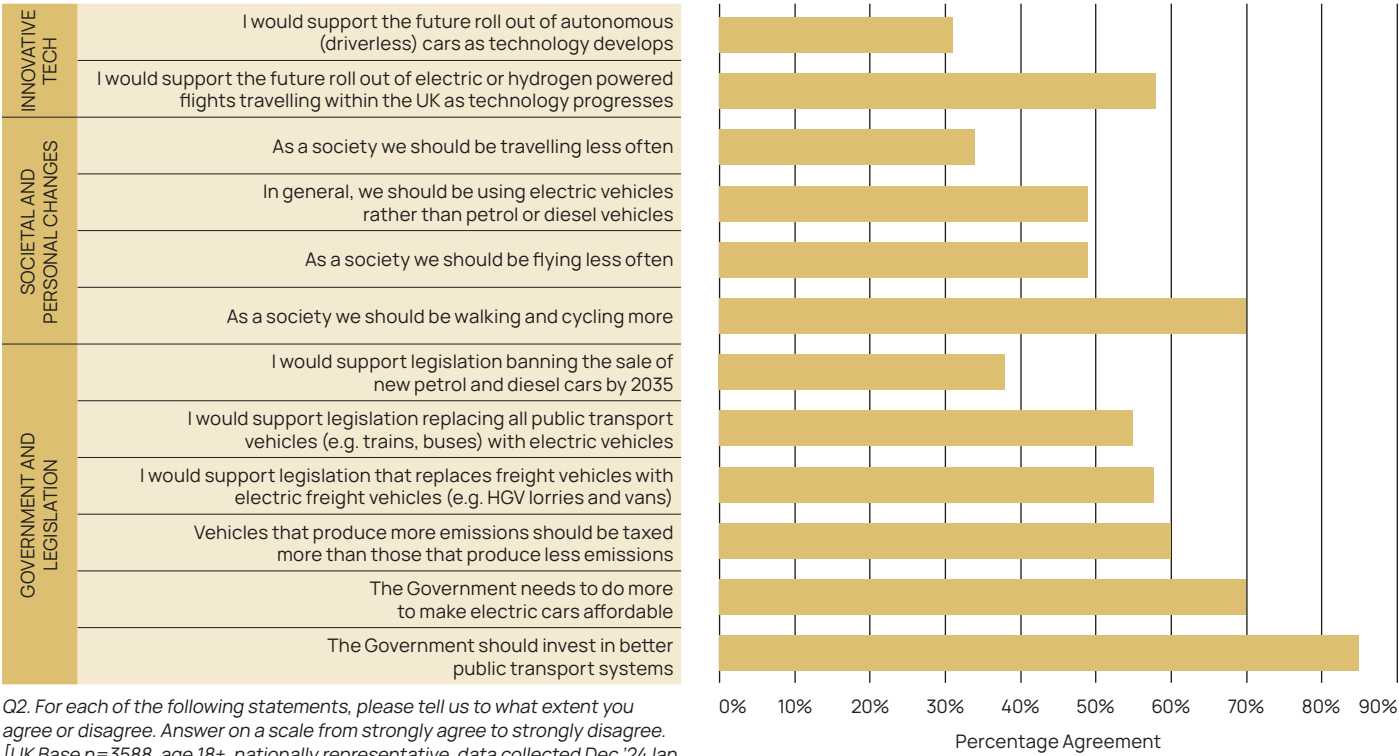


Figure 2: UK publics views on innovation, personal, societal changes and government/legislative changes relating to travel



This is perhaps less surprising than some public and media debates around decarbonisation might suggest. As Table 1 shows electrification of transport systems and services is seen as a priority by many in the UK, particularly public transport such as buses and trains, which 80-85% and 77% of respondents respectively see as a priority for investment. Only 9-12% and 11% respectively say this is not a priority. In comparison with investment in these more familiar and widely utilised forms of public transport, investment in sustainable aviation technologies (electric or hydrogen flight) serving remote, isolated or rural areas is nevertheless seen as a

priority by 71% of respondents, with only 16% saying this is not a priority. This is broadly comparable to levels of support for investment in electric cars (73% a priority versus 20% not a priority) and new road building (75% a priority versus 15% not a priority).

Whilst there is clearly support for sustainable aviation serving rural and remote communities, we also found that two-thirds (66%) of respondents see investment in electric or hydrogen-powered regional flights connecting towns, cities and regions across the UK as a priority. Only 22% do not see this as a priority area for investment.

Table 1: Types of transport development and investment

		High Priority	Low Priority	Not a Priority	Net Priority
Electric Ground-Based Transportation	Electric buses in towns and cities	64%	21%	9%	85%
	Electric buses in rural or remote areas	53%	27%	12%	80%
	Electric/Hydrogen Trains	51%	26%	11%	77%
	Electric freight (e.g. Heavy Goods Vehicles)	49%	26%	13%	75%
	Electric cars	42%	31%	20%	73%
Active Travel	Improved pedestrian networks	61%	25%	8%	86%
	Improved cycle networks	46%	29%	18%	75%
Improvements of/Additions to Existing Infrastructure	High speed train networks	52%	28%	13%	80%
	Trams in cities and towns	48%	31%	12%	79%
	New road building	37%	38%	15%	75%
Sustainable Air-Based Transportation and Innovation	Electric or hydrogen flight in remote, isolated or rural areas	39%	32%	16%	71%
	Electric or hydrogen regional flight (e.g. Electric aircraft transporting passengers between different regions, towns, and cities in the UK)	32%	34%	22%	66%
	Electric flight within towns and cities	22%	34%	34%	56%
	Drones for transporting goods	29%	40%	22%	69%

* Percentage of Participants' Agreement.

Q3. Now thinking about transport within the UK, for each of the following types of transport development and investment, please tell us whether you think it should be a high priority, low priority or not a priority over the next 10 years. [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

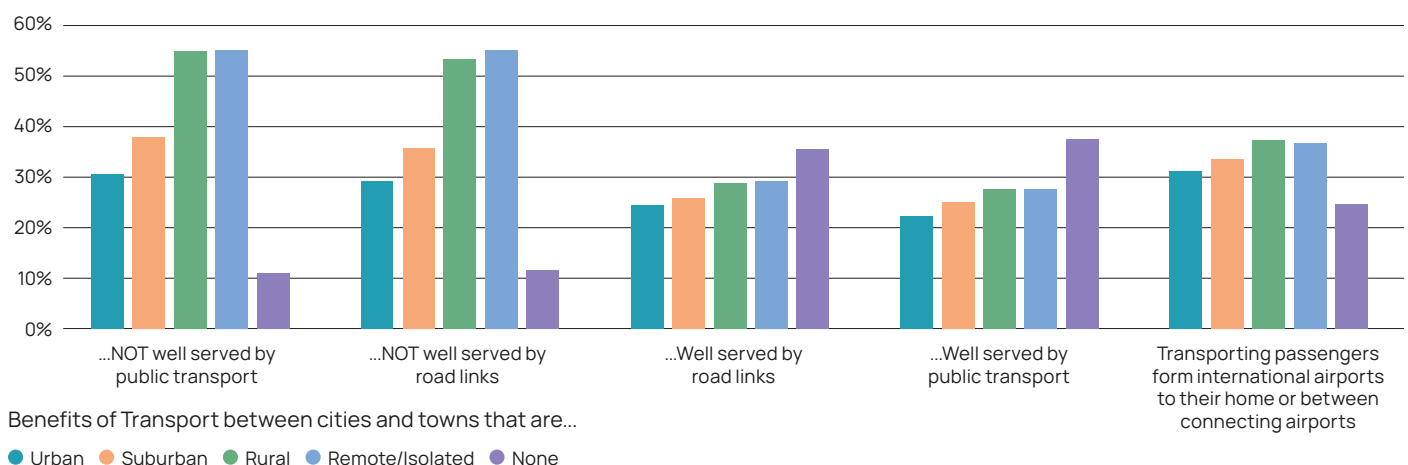
Despite the unfamiliarity of these forms of aviation, and the fact that aviation is currently a less widely used form of regional transport than roads¹⁶, UK publics place a similar level of importance on investment in sustainable regional aviation as they do on more established transport modes and infrastructure including electric cars and road building. This suggests publics recognise the potential value of supporting a diversity of transport modes in the UK and highlights a desire to locate sustainability at the heart of UK transportation.

This is particularly the case for the introduction of new modes of aviation transport such as drones and eVTOLs, which 73% of UK publics feel should only be introduced if they are more sustainable than existing modes¹⁷. We also found that support for emerging

forms of sustainable aviation, such as eVTOLs, is higher where these technologies, systems or services are positioned as augmenting existing transport services, connecting currently poorly served or badly connected towns and cities or remote/isolated areas, as opposed to replicating existing services or connecting areas already well served by existing transport links [Figure 3].

Overall our findings suggest that the UK public is supportive of investment in a new distributed aviation system. However, they are also discerning about where and how this system is built. Wider public buy-in for these technologies is contingent on them addressing environmental or social needs and being implemented equitably.

Figure 3: UK publics views on most beneficial uses of eVTOLs in relation to current transport links and Location



Q4. Please indicate whether you think eVTOLs would be beneficial or not beneficial within different types of community in the UK. Please select all communities, if any, where you think this technology would be useful [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]



Bristow Group

“Bristow is the leading helicopter operator in the UK, transporting people and goods to offshore oil & gas platforms and saving lives providing search & rescue services to the UK Coastguard. Building on over 75 years of experience in the safe introduction of new flight technologies, Bristow is bringing eVTOL aircraft into its portfolio.

Bristow has partnered with OEMs across the world, including on the first extended six-month operational testing of an eVTOL aircraft in Norway with OEM Beta Technologies. Beta is using its experience with eVTOL in developing its eVTOL aircraft.

In the UK, Bristow are working together with Vertical Aerospace on the operational viability of eVTOL transport in the Oxford-Cambridge Growth Corridor. Bristow, Vertical and Skyports will launch the UK's first eVTOL network between Canary Wharf and major transport hubs from 2029.

The UK use cases for eVTOL are compelling: supporting remote region connectivity, providing logistics services to the public and private sectors, and business passenger transport across cities. Chris Bradshaw, Bristow CEO, says, “The UK is a key market for Bristow's eVTOL operations. We are excited to share our deep experience in bringing these aircraft into operation safely and pragmatically.”



Chapter 4:

Can distributed aviation systems address UK transport challenges and meet public expectations?

Distributed aviation systems which include eVTOLs are increasingly being discussed as one way in which we might respond to some of the transport challenges across the UK. These include regional connectivity and accessibility whilst also supporting economic opportunities and regional growth.

Any value eVTOLs offer will depend on how far they can complement existing transport systems rather than replace them, and how well they are integrated not only into wider networks of aviation, rail, and roads, but also into existing public service obligation routes or public sector use (e.g. air ambulance, policing or infrastructure inspection and management).

There are social, economic and environmental considerations that will continue to shape any rollout of eVTOLs in the UK. These also sit within wider policy contexts focused on economic growth, regional development, innovation, improved connectivity and the transition to lower-carbon transport systems. The UK has already invested in successful programmes aimed at supporting the development of future flight technologies, building a capability base that is now moving from research and demonstration towards real-world application and integration. The focus is now therefore shifting from technological possibility to asking how these systems might be deployed within a wider transport ecosystem, where they could add

value, and how any benefits might be distributed across different places and communities in the UK.

Internationally, discussions on the role of eVTOLs has largely focussed on urban passenger transportation, particularly within major cities such as New York, Singapore, Sao Paolo, Los Angeles, Paris and Tokyo. 'Short hop' or inter-urban flights are also frequently highlighted in visual media of eVTOLs. However, individuals living in urban areas and larger cities in the UK are relatively well-connected in terms of existing travel options including vehicular and active travel, with private cars acting as an 'equaliser' in connecting rural areas.¹⁸ There are then additional and distinct opportunities for eVTOLs within the UK context. For example, existing research has highlighted the potential role of eVTOLs in improving regional connectivity as well as their associated socio-economic benefits.¹⁹ Connecting regions therefore may be considered one of most beneficial and attractive uses for initial services.²⁰ Our survey findings broadly reflect this as UK publics see eVTOLs as most beneficial for transport in places that are not currently well served by road or public transport links (see Figure 3). Likewise, eVTOL services were seen as especially beneficial when transporting people between towns or rural villages, or remote and isolated communities (77%) in comparison to transporting people within larger towns or cities (50%)²¹.

Courtesy of Vertical Aerospace. © Vertical Aerospace, Inc.

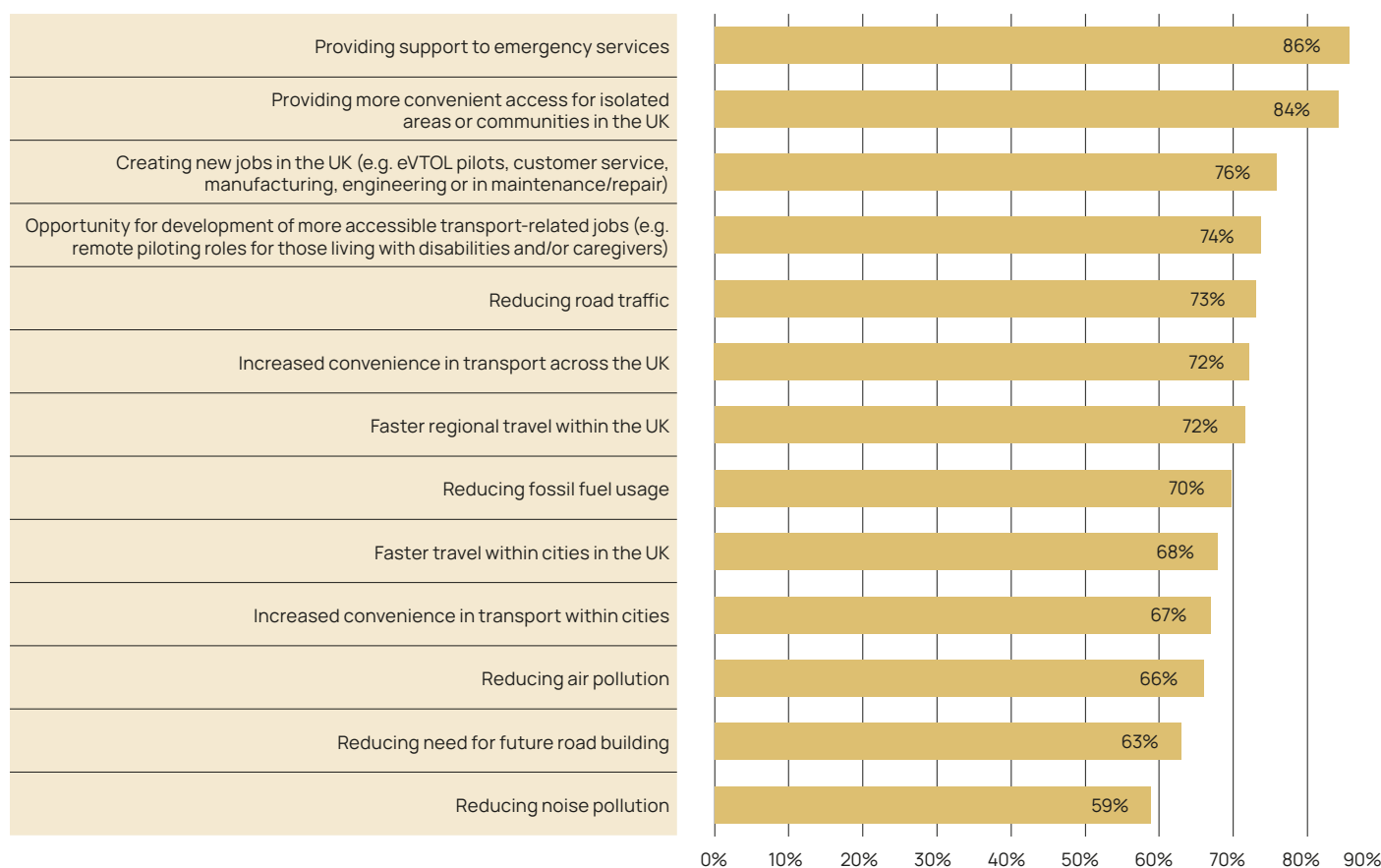


A distributed aviation system that incorporates eVTOLs could help to address some of the connectivity issues highlighted earlier in this report, particularly in places or along routes that are currently less well served by existing transport infrastructure. Transport interventions have the potential to generate wider economic opportunities. If integrated effectively with other transport modes, systems and services, a distributed aviation system could not only contribute to better nationwide transportation connectivity, but could also support wider efforts to decarbonise transport, and create new green growth opportunities in parts of the UK. These kinds of economic opportunities were also a potential positive impact that was recognised by members of the public taking part in our research.

Alongside potential connectivity benefits, UK publics also identified a number of wider societal benefits in relation to eVTOLs. During our

public dialogues, participants identified job creation as one potential benefit associated with eVTOLs, particularly in areas such as manufacturing, piloting, maintenance and airspace management.²² Similarly, in our survey 76% of respondents saw a benefit of eVTOLs being the opportunity to create new jobs in the UK (see Figure 4). Improved regional connectivity may also create opportunities for additional employment linked to the operation of new services and infrastructure, including vertiport operations, customer services, digital systems, and other supporting activities. However, the extent to which these benefits are realised is likely to depend on where services are deployed and how they are integrated into existing regional economies and transport networks. Whilst dialogue participants could see opportunities for job creation, they also sought reassurance that these benefits would be distributed fairly and would support communities across the UK.²³

Figure 4: Net potential benefits of eVTOLs



Q5. A number of potential benefits of eVTOLs have been suggested. For each of the potential benefits listed below, please tell us whether, in your view, you think it will be a major benefit, minor benefit or not a benefit of eVTOLs. [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]



As Figure 4 shows, one of the clearest benefits publics identified in relation to eVTOL services was their potential to support emergency service operations. Across our survey data, 86% of respondents felt these technologies could provide benefits by supporting emergency services. Respondents also saw potential for eVTOLs to assist during events such as flooding, wildfires, and disaster relief. This potential was viewed particularly positively in rural (67%) and remote or isolated areas (66%) but was also recognised in suburban areas (51%)²⁴. Alongside perceived benefits relating to transport convenience, journey times and connectivity, respondents also identified a range of potential environmental benefits. These included the possibility of reducing road traffic, lowering fossil fuel consumption, reducing demand for future road building, and contributing to improvements in air quality. Some participants also felt that eVTOLs could help reduce certain forms of noise pollution associated with existing transport modes. It should be noted, however, that participants in our qualitative dialogue research also wanted to ensure greater transparency around both the anticipated and realised sustainability and environmental benefits of Future Flight vehicles. This suggests that for many, the environmental case for these technologies would need to be evidenced rather than assumed.

Viewed alongside earlier findings on regional connectivity, particularly for remote, rural and isolated communities, a clear pattern begins to emerge. This suggests that support for eVTOLs is often linked less to the technology itself and more to the specific environmental issues or social needs and problems people believe they might help to directly address.

Alongside the benefits outlined above, publics also identified a range of wider economic and societal benefits that could arise from the introduction of eVTOL technologies, systems and services. Qualitative data collected through community engagement in early 2026 shows that UK publics recognise potential local and regional economic benefits including not only access to more and diverse jobs (e.g. in manufacturing, service provision) but also other economic benefits accrued through downstream impacts such as increased tourism to currently poorly connected areas or regions.²⁵ More broadly, during this community engagement participants voiced a desire to see the UK act as a leader in innovative technologies. They thought that supporting the development of a 'home-grown' eVTOL industry would allow the UK to build on and restore pride in an



Courtesy of Archer Aviation. © Archer Aviation, Inc.

Archer

“Archer has established its UK Engineering Hub in Bristol to support some of the company’s most advanced engineering work across both its commercial and defence programmes, and serves as the base for Archer’s collaboration with Anduril UK on uncrewed vehicle programmes. Selected for its deep aerospace talent pool and long history of aviation innovation, Bristol is a significant and growing area of focus for Archer as the company expands its partnerships and engineering capacity in the UK market.”

industrial heritage that they felt had not been adequately prioritised. Innovation and supporting the development of new technologies was seen by some as a good in and of itself, as it facilitated a virtuous circle of further new technological developments that could lead to improvements in overall quality of life. For these participants, the value of eVTOLs extended beyond transport or service provision alone. In this instance, innovation itself was often viewed positively, particularly where it was seen as contributing to wider social and economic progress and supporting future improvements in standards of living.



Courtesy of Archer Aviation. © Archer Aviation, Inc.

Chapter 5:

Conditions, constraints

and trade-offs shaping

public views of eVTOLs

Public support for eVTOL vehicles, systems and services was accompanied by a number of key concerns around their potential introduction into the UK. These concerns were broadly consistent across different regions and the most frequently cited concerns related to cybersecurity (79%), affordability (78%), visual pollution (78%), aircraft safety (77%) and impacts on wildlife (77%) (see Table 2).

Interestingly and contrary to some assumptions that have shaped discussions around these technologies, noise was not routinely identified as one of the ten most significant concerns across our data. Nevertheless, it was still identified as a potential issue by 65% of survey respondents. This finding highlights the importance of engaging communities in detailed and meaningful discussions about emerging technologies, such as eVTOLs, as concerns that might be prevalent in policy, industry or media debates do not always align with those identified by publics themselves.



Table 2: Potential drawbacks of eVTOLs

	% Net Concerned
Cyber security threats (e.g. hackers attacking vehicle operating systems)	79%
The potential for skies to become crowded with aircraft	78%
These technologies will be too expensive for most people to afford	
How technologically safe these aircraft would be	77%
The impacts on animals, such as birds or agricultural animals	
Mid-air collisions with other aircraft	75%
Collisions into ground or buildings	
The potential for use in criminal activity	
Invasions of privacy (e.g. from low-flying air vehicles, in-air video-recording)	74%
Habitat destruction when building new on-ground infrastructure (e.g. eVTOL landing sites)	70%
Increased noise pollution	65%
These technologies may not be easily accessible to those with mobility issues and/or those living with disabilities	64%
Increased on-ground traffic nearby new eVTOL landing sites	57%
Duplication of existing services that use road or rail transport	
Impact on house and land values nearby new eVTOL landing sites	56%
The potential for job losses	53%

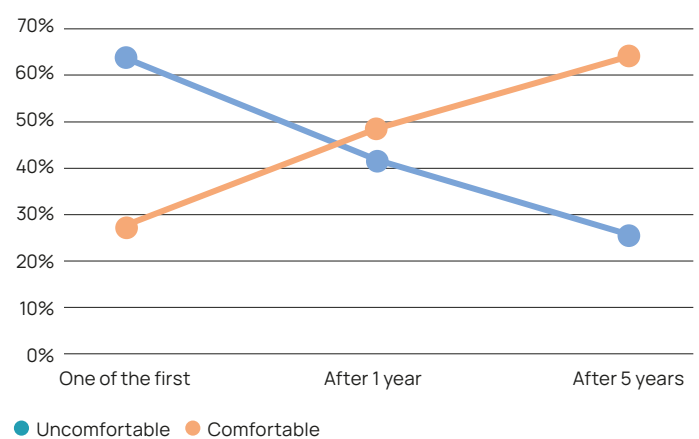
* Percentage of Participants' Agreement.

Q6. A number of potential drawbacks of eVTOLs have been suggested. For each of the potential drawbacks listed below, please tell us how concerned or unconcerned you are about it in relation to the development of eVTOLs. Options: Very concerned, Somewhat concerned, Not very concerned, Not at all concerned, Don't know [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

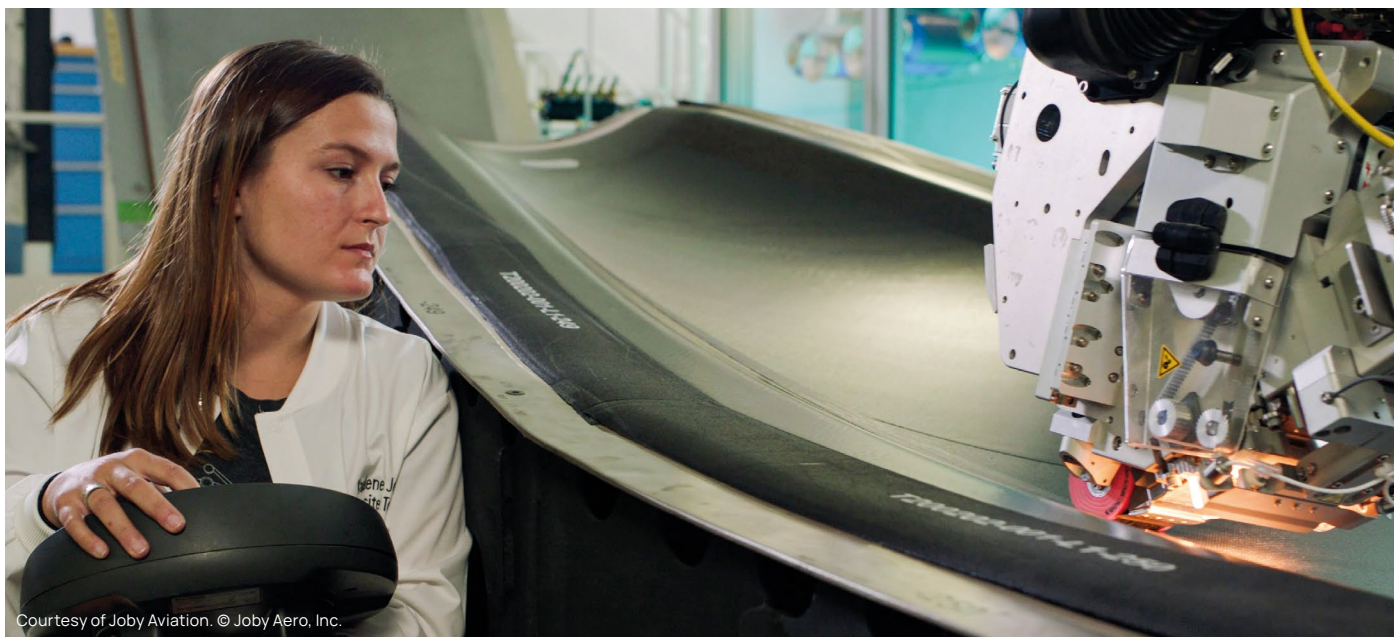


Alongside these more specific identified concerns, our qualitative data revealed a number of more complex and nuanced perspectives or attitudes. Qualitative data collected via our 2024 public dialogue and our more recent community engagement in 2026 suggests that, particularly in the early phases of the wider roll out of these technologies, publics recognise that eVTOLs may be largely inaccessible to the general population as routes may be limited and costs may be prohibitively high. This is reflected in our survey findings, where over three-quarters of respondents (78%) expressed concern that these technologies will be too expensive for most people to afford (see Figure 4). However, for some participants, this period of wider public inaccessibility was not framed as wholly negative, as it would allow for the safety and reliability of these technologies to be rigorously and robustly demonstrated over a period of years. Our survey data also broadly supports this. Reported comfort with taking an eVTOL journey increased as the length of time the technology and services had been operating increased, with 64% of respondents reporting that they would feel comfortable taking an eVTOL journey after services had been operating for five years, compared to 28% who reported being comfortable being among the first passengers to use such a service (see Figure 5).

Figure 5: Comfort with using eVTOLs in relation to length of time in operation



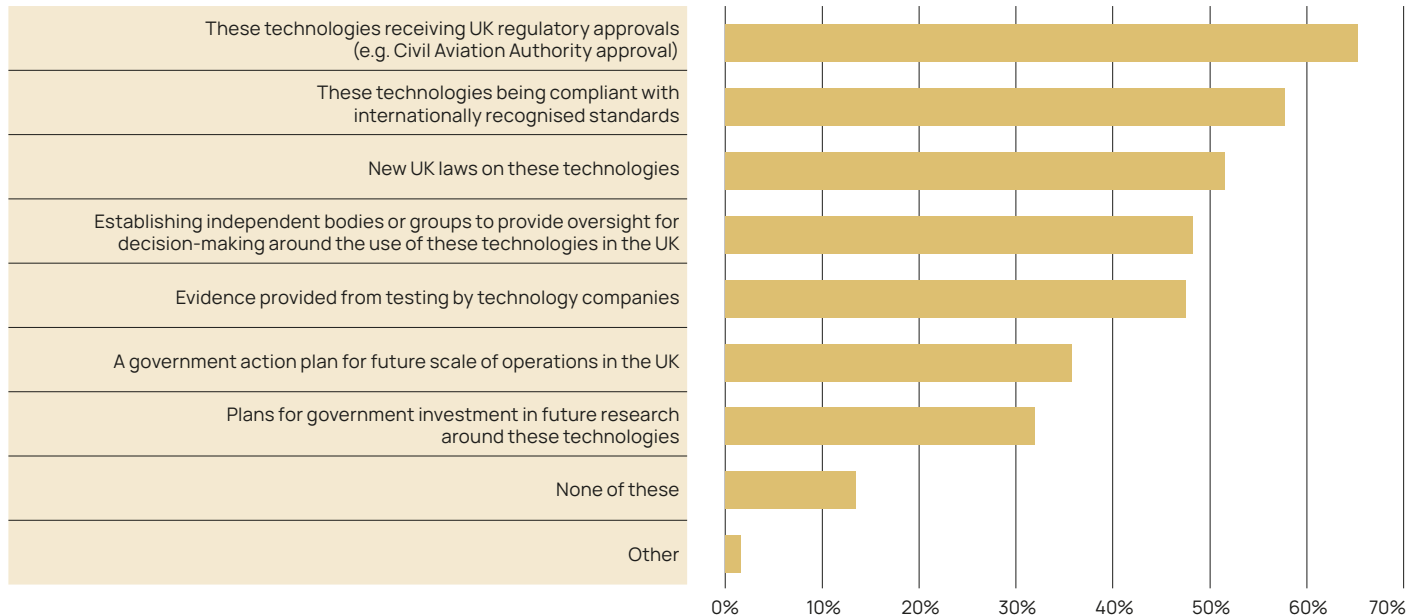
Q7. Please indicate how comfortable or uncomfortable you would be with each of the following: 1) Being one of the first people to take an eVTOL journey; 2) Taking an eVTOL journey after services have been running for a period of time (e.g. 1 year); 3) Taking an eVTOL journey after services have been running for a longer period of time (e.g. 5 years). [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]



This reluctance to act as early adopters of eVTOL technologies went alongside an indicated desire for reassurances that these new Future Flight technologies would be safe and reliable. For many UK publics, these assurances would be best provided through UK regulatory and standards bodies approvals (see Figure 6). Publics in our qualitative

dialogue saw an important role for regulators and oversight bodies in ensuring the introduction of Future Flight technologies, systems and services was carefully managed and that potential negative impacts were minimised.

Figure 6: Measures to build public trust in eVTOL/drone technologies and services safety



Q8. If the future flight technologies discussed in this survey are used for commercial services and scaled up within the UK, there are a number of different steps which may be taken to ensure these new technologies are safe (e.g. government policies, regulations, international standards). With this in mind, please indicate which, if any, of the following would make you feel that future flight technologies are safe. Please select all that apply. [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

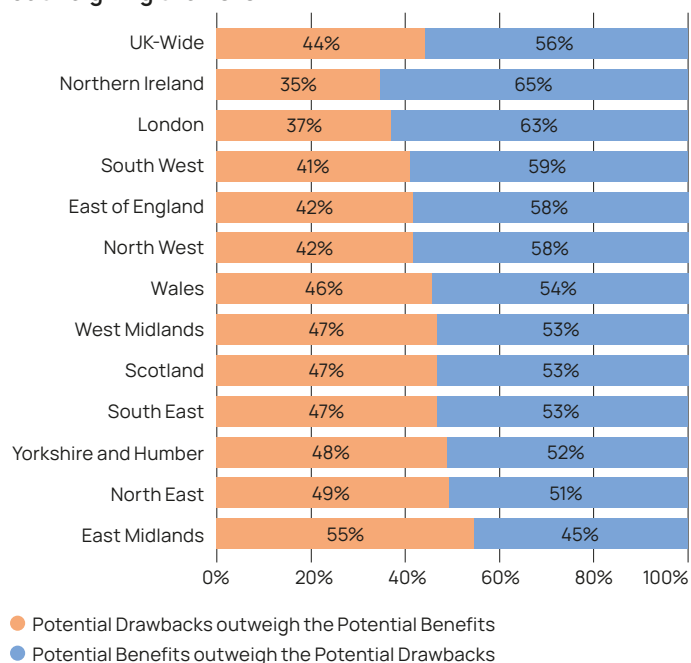
Across our dialogue, community engagement and survey data, a consistent message from publics was that the benefits of these technologies would need to be equitably distributed across UK regions and the population as a whole if they are to secure widespread public support. Nearly three in four survey respondents (71%) considered it important that passenger-carrying eVTOL services be affordable to the wider public and not just wealthier individuals within 10 years of the first commercial services being introduced²⁶.

At the same time, our 2026 community engagement suggested some publics might see a potential tension emerging in future if these technologies and services become more widespread, with broader public access to services necessitated by and resulting in a greater volume of flights and associated infrastructure development, leading to potentially higher levels of negative impacts. As a result, participants were particularly concerned that the development and roll out of these technologies needed to be carefully managed,

including through on-going engagement with local communities where infrastructure was to be installed or along potential flight routes. There was a concern that communities may be subject to the costs associated with these technologies whilst seeing limited benefits. Participants saw ongoing community engagement as a key mechanism to ensure that they were not solely subject to what they perceived as potential negative impacts (e.g. increased noise and visual pollution, impacts on privacy, increased infrastructure demands etc.) whilst experiencing few of the benefits (e.g. accessible regional connectivity, associated social and economic gains).

Despite these nuanced concerns and caveats, publics across the UK nevertheless recognised the potential for eVTOLs to make a positive contribution in some contexts. Overall, 56% of survey respondents felt that the potential benefits of eVTOLs outweighed the potential drawbacks, (see Figure 7).

Figure 7: UK publics views by region on benefits of eVTOLs outweighing the risks



Q9. Considering the potential benefits and potential drawbacks of eVTOLs, which of the following statements comes closest to your view? [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

Overall, there is a clear expectation that eVTOL use will become part of the UK transport landscape over the next ten years, particularly for transporting passengers between towns and villages in isolated or remote areas (59%) and for replacing existing emergency service helicopters (50%) (see Figure 8). While expectations are somewhat lower, they remain notable, for transporting passengers within cities or larger towns in the UK, between towns and cities in the UK, and to/ between international airports, suggesting broad recognition of their relevance across a range of transport use cases, albeit with stronger consensus around likelihood and perceived value of use cases that respond to specific social needs (see Figure 8).



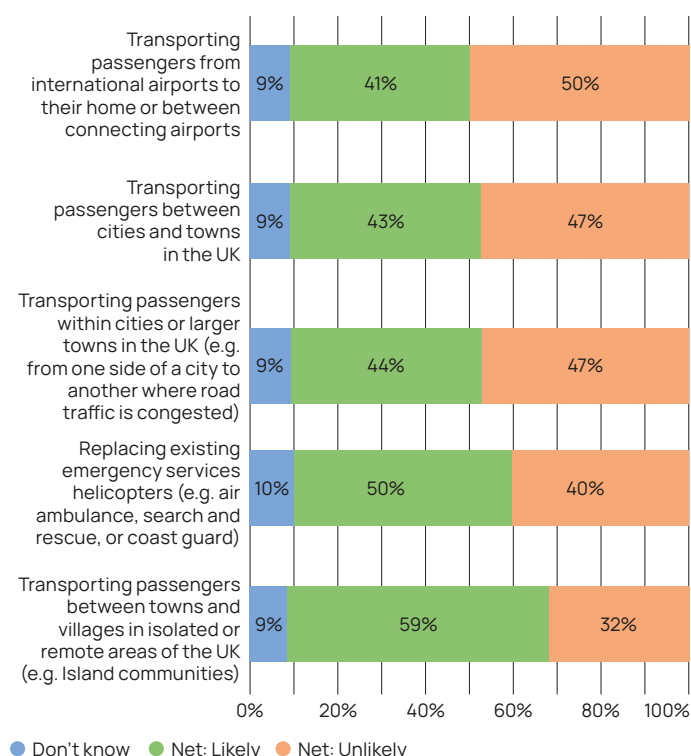
Joby

“The UK has the opportunity to be one of the first countries in the world to launch commercial eVTOL operations, and at Joby we see ourselves as well placed to help realise that ambition. With years of aircraft development, flight testing, acoustic analysis and operational planning behind us, we see significant long-term potential for scaled UK operations, from airport connections and inter-city regional routes to services that improve access for communities less well served by existing transport.

Joby's aircraft is designed to deliver fast, quiet, emissions-free journeys that complement rail, road and regional airports rather than replace them. As operations mature, we expect the benefits can extend beyond passengers: supporting skilled UK jobs and workforce upskilling across operations, maintenance, infrastructure, airspace integration and customer service based on our cutting edge technology. Over time, Joby's UK operations could contribute to regional growth, improved connectivity to jobs, education, healthcare and tourism, and more resilient public service delivery.”



Figure 8: UK publics perception of likelihood of eVTOLs widespread use in the next ten years



Q10. Thinking about each of the ways in which the different future flight technologies mentioned previously might be used, please now tell us how likely or unlikely you think it is that these will become widespread in the UK within the next ten years. Potential uses for electric vertical take-off and landing air vehicles...Electrical vertical take-off and landing vehicles (eVTOLs) that provide short journeys for up to 10 people? [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

While a narrow majority sees the benefits of eVTOLs outweighing the risks, our qualitative research highlights that the support from this majority group should not be taken for granted. It is contingent on the conditions this report has highlighted: that benefits and impacts are distributed fairly, that robust regulation is in place, that services are affordable within a reasonable timeframe, and that communities are engaged with throughout.

Public dialogue participants' visions of best- and worst-case futures highlight both the potential benefits and risks associated with the roll out of eVTOL services in the UK. In the best case, services were seen as enabling improved connectivity, greater accessibility, and more sustainable travel options across the UK. In the worst case, concerns centred on poorly managed roll-out, affordability, safety, environmental impacts, and unintended consequences for existing transport modes. Taken together these perspectives point to the need for coordinated planning across local, regional, devolved and national levels to ensure that development is not fragmented and that benefits are realised consistently across geographies and applications. This in turn underscores the importance of strengthening engagement and coordination across governance levels.



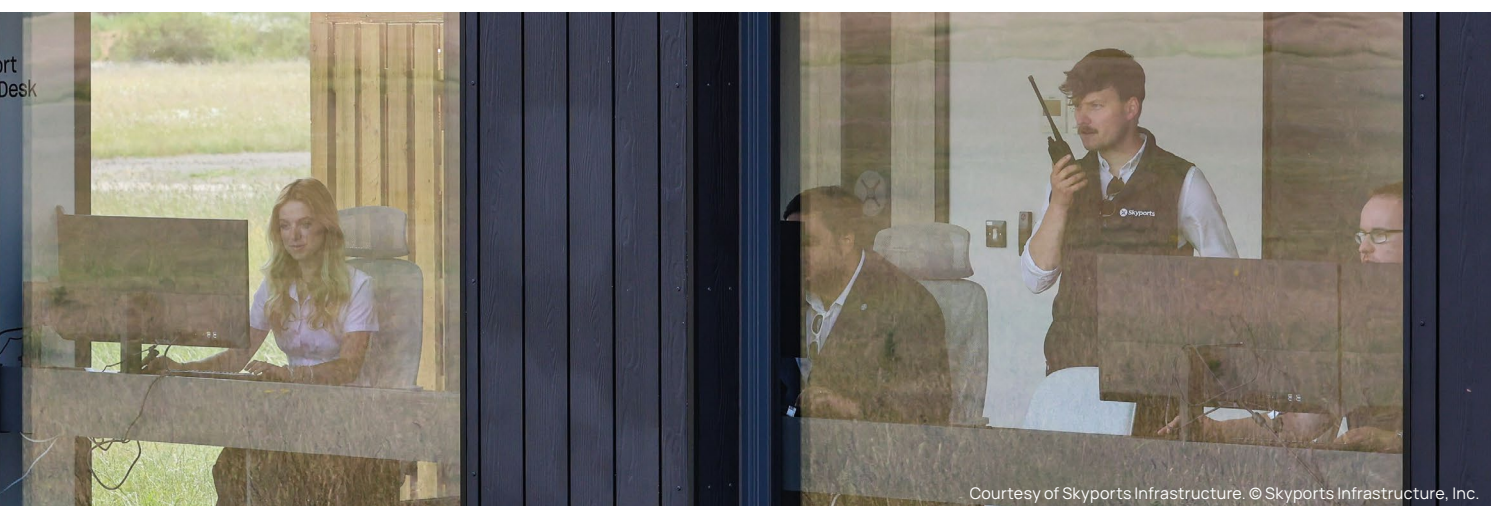
Skyports

“Where conventional helicopters are loud, expensive and polluting, eVTOLs provide a solution to all three of these issues, which will bring rapid transportation and logistics to a wider demographic with minimal environmental and social impact.

Having the right infrastructure in place however is a critical component – with nowhere to land and charge, the whole model falls over.

Skyports is already underway in developing a UK vertiport network, with a core central node in Canary Wharf, based out of our Skyports London Heliport. From here, we have ambitions to create a nationwide network connecting major airports and key regional hubs.

This network will bolster regional growth, especially between smaller cities such as Oxford and Cambridge that currently lack high speed transport links, and bring with it new high-tech jobs that will upskill communities out of London.”



Chapter 6:

Recommendations

Drawing on the findings from our social science research, we have developed a set of recommendations intended to bring the development of eVTOL technologies into closer alignment with UK publics' hopes, expectations and concerns.

- **Early community and public engagement is vital as these technologies, systems and services transition from development and demonstration towards wider deployment.**

The findings presented in this report suggest that UK publics are likely to support the introduction and roll out of eVTOL systems and services, however this support is conditional rather than unconditional. Publics are most broadly supportive of these emerging aviation technologies where they are seen to address real-world challenges around connectivity, accessibility and wider social benefit, but they remain attuned to questions of affordability, fairness, safety and environmental impact.

Current public willingness to support eVTOL flights should not be assumed and will need to be supported through continued public consultation and engagement. Opportunities for direct public engagement with eVTOL technologies and infrastructure should continue as systems develop. Our findings suggest that hands-on demonstrations can help people reassess initial assumptions formed through media or cultural representations, but they do not remove underlying concerns around, for example, affordability, invasions of privacy or other socio-economic impacts (e.g. on jobs).

- **Future eVTOL systems and services should be implemented around existing transportation and connectivity challenges experienced across the UK.**

Whilst international discussions of eVTOLs often focus on urban air mobility, our research findings suggest stronger public support for services that provide better regional connectivity in the UK, especially where existing infrastructure or services are challenged or limited. Likewise, services that address gaps in existing

provision, particularly in less well-connected areas, or serving rural, remote or island communities are likely to accrue greater public support. Furthermore, eVTOLs services are more likely to be supported where they are seen as part of a wider and integrated multimodal transport system rather than a standalone innovation.

- **Development of the workforce and UK skills base is required to support emerging eVTOL systems.**

Concerted action is required to develop the skills pipeline necessary to realise wider societal benefits of eVTOL technologies. This includes roles across manufacturing, operations and maintenance, but also extends to digital infrastructure, airspace management, customer services and regulatory functions. Publics identified the prospect for employment opportunities that are distributed across different regions and accessible to a range of skill levels, and tended to more strongly support these scenarios.

- **Further independent research is needed on the sustainability and environmental impacts of eVTOLs and where benefits are identified these should be communicated.**

This includes potential effects on wildlife and biodiversity, as well as full lifecycle assessments covering production, operation and end-of-life processes. This is particularly important given ongoing public concerns about environmental trade-offs associated with new transport technologies. Where robust evidence for the sustainability benefits of eVTOLs can be provided, this is likely to increase public support for their introduction. As benefits are identified they should be highlighted and communicated to publics and other stakeholders.

- **Clear and robust regulation of eVTOLs is necessary prior to their roll out to ensure public support.**

Publics expect strong and proactive regulation of these technologies as they emerge. This will reassure publics that these

technologies are safe, their potential social and environmental impacts will be monitored and that there are mechanisms for publics to raise concerns and accountability if things go wrong. Without this robust and transparent regulatory regime in place, publics are less likely to support widespread eVTOL operations.

■ **Engagement and awareness raising is urgently required across local, regional, devolved, and national government.**

Greater engagement is needed in relation to governance, planning and coordination across local, regional and national levels. This includes improving understanding within local authorities not only of the opportunities but also of the infrastructure requirements linked to eVTOL deployment, such as vertiports and associated airspace management. Lessons may be drawn from existing demonstration sites and regional aviation infrastructure, but integration will require clearer coordination between regulators, planners and service operators. Local decision-making on a distributed model of aviation that includes short hop as well as longer journeys is not comparable to more established vehicular transport modes and there is also a clear need to consolidate engagement between local authorities.

■ **Communications about eVTOLs should reflect the most realistic, likely and socially desirable types of services.**

Terms such as 'flying cars' or 'air taxis' can embed misleading assumptions about what eVTOLs are and how they are likely to operate. While this language is often used to signal that some services may be on-demand (rather than fully scheduled), it risks being interpreted as implying door-to-door, curb side or private-residence access, or use in ways that mirror current private car ownership. Continued use of framing analogous to private cars also risks reinforcing perceptions of eVTOLs as exclusive or "elite" technologies, or as novelty forms of transport rather than part of a wider integrated transport system. This has implications for public trust and for the credibility of communications around emerging transport technologies.

Communications should instead be grounded in how these distributed aviation systems and services are actually expected to function, with clearer emphasis on transport integration, connectivity, and potential public service applications.

These recommendations reflect a core message emerging from our research. UK publics are broadly supportive of eVTOL technologies,



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Courtesy of BETA Technologies. © BETA Technologies, Inc.

systems and services, where they are seen to deliver clear social, environmental and economic benefits, particularly through improved connectivity, green-growth, accessibility and affordability. However, they are equally clear that support depends on these technologies being introduced in ways that are safe, sustainable, fair and responsive to local needs and concerns.

There is therefore an opportunity for the UK to demonstrate continued international leadership not simply through the development of new aircraft technologies or services, but through the design of a citizen-mandated distributed aviation system. Such a system would be shaped not only by technological capability and market logics, but also by transparent governance, meaningful public engagement and clear accountability around how decisions are made at local, regional and national levels. Publics consistently expressed a desire to be involved in conversations about how these technologies are deployed, where infrastructure is located, and how potential benefits and impacts are distributed.

The UK has already demonstrated leadership through investments in programmes such as the UKRI Future Flight Challenge, and the ongoing work of the Civil Aviation Authority and the Department of Transport. The next step is to ensure that the development and integration of eVTOL systems and services remain grounded in public priorities and wider societal value. A citizen-mandated distributed aviation system is not simply one that introduces new technologies, but one that is attentive to how opportunities, benefits and impacts are distributed across society. We have a unique opportunity to ask not only what a new distributed aviation system could look like in the UK, but what it should look like in the UK. Our research suggests publics can see considerable potential in these technologies to contribute to improved connectivity, accessibility, economic opportunity and sustainability. Realising that potential will depend not only on technological innovation, but also on governance, engagement and the extent to which benefits are experienced across different places and communities. Importantly, this report demonstrates that how this system is built, and who it is built for, will ultimately determine whether it earns and maintains public support.

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