Technology Tracker: Spring Wave 2025

Report prepared for the Department for Transport

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1 Overview

The Spring 2025 wave of the Department for Transport's Transport Technology Tracker series involved a survey of a representative sample of 4,058 individuals aged 16+ across the UK. The survey was conducted using a random probability sampling approach, inviting up to two adults from 15,800 households to take part. Fieldwork took place between 2nd May and 13th June 2025.

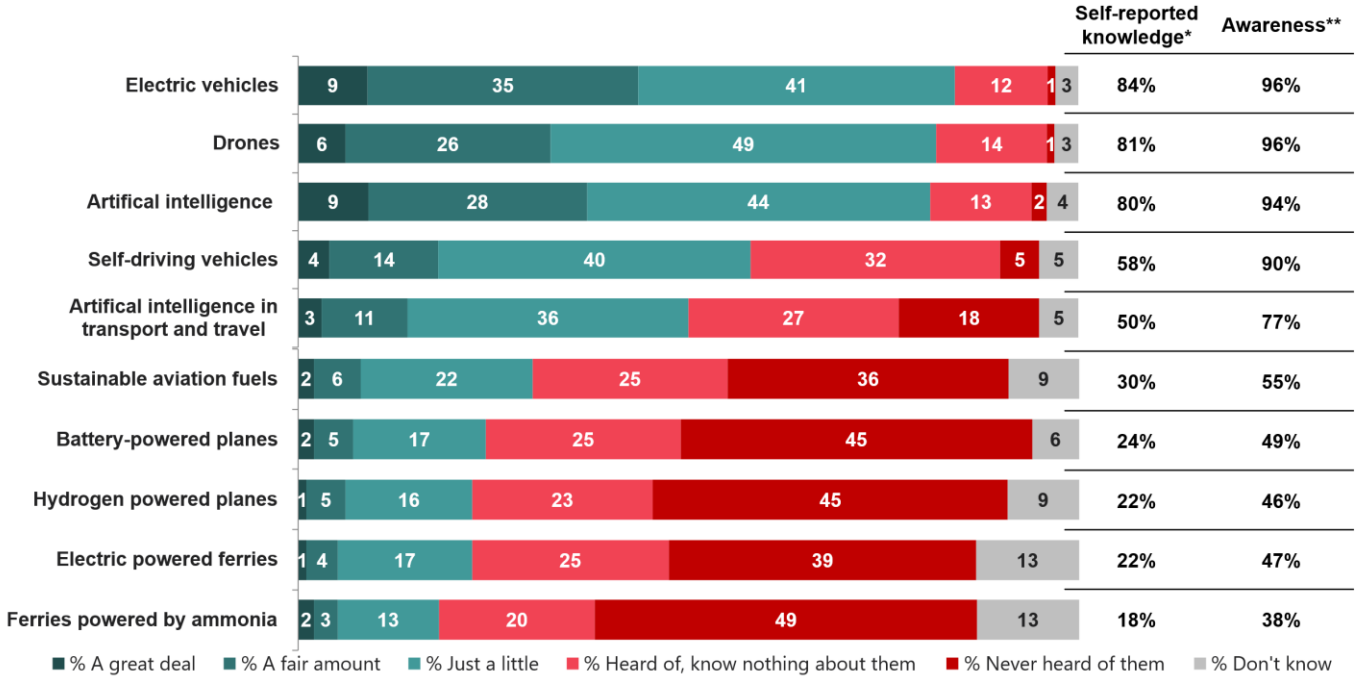
This report presents findings from the Spring 2025 wave, offering insights into the current public perceptions of transport technology across the UK. Where survey questions have remained unchanged, comparisons have been made with the Autumn 2024 wave. However, comparisons with earlier waves are not included, as differences in sample composition and measurement mode introduced in Autumn 2024 make such comparisons inadvisable. All previous reports remain available for those interested in exploring long-term trends. exploring long-term trends.

When reviewing this report, it is important for readers to note that any differences highlighted as statistically significant are evaluated at a 95% confidence level, indicating a high degree of reliability in the observed differences among different subgroups. Differences between subgroups were assessed using Quantum, an industry-standard software for market research. More information about the methodology and the sample can be found in the Appendix. The survey questionnaire is also included in the Appendix, including the descriptions used for several transport technologies.

1.1 Awareness and knowledge

Figure 1.1 below shows the levels of awareness and self-reported knowledge for the range of transport technologies included in the Spring 2025 wave.

Figure 1.1: Awareness and knowledge by technology



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little(combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it(combined)

Base: All 16+ in UK (unweighted valid responses, Spring 25: Electric vehicles 4052; Self-driving vehicles: 4052; Drones: 4045; Artificial intelligence: 4052; Artificial intelligence in transport and travel: 4035, Ferries powered by ammonia: 4046; Electric powered ferries: 4024, Battery-powered planes: 4054; Hydrogen powered planes: 4050; Sustainable aviation fuels: 4047.

Individual sections of this report, and the summary sections at the start of each, describe awareness and self-reported knowledge for the technologies in more detail.

Across these technologies, awareness and self-reported knowledge varied. Electric vehicles (EVs), drones and artificial intelligence (general) had the highest levels of both awareness and self-reported knowledge. These were followed by awareness and self-reported knowledge of self-driving vehicles (SDVs), artificial intelligence in transport and travel. Awareness and self-reported knowledge of sustainable aviation fuels (SAFs), battery-powered planes, hydrogen powered planes, electric powered ferries and ferries powered by ammonia were lower than the other technologies.

1.2 Current and future usage of technology

Car purchase intentions remained high, with 67% of people saying they would buy, lease or replace a car or van in the future, consistent with the previous Autumn 2024 wave. Of those intending to buy or lease in the future, 37% would choose a petrol car or van, 29% would choose a hybrid car or van, 14% would choose a diesel car or van and 13% would choose an EV. Whilst these figures mostly remained consistent with the previous wave, there was a statistically significant increase in people planning to buy or lease an EV next (10% in Autumn 2024).

In the last 12 months, one in six people in the UK had taken an international flight, and 25% had taken a UK flight. In contrast, ferry usage was lower, with only 16% having taken a ferry trip within the UK and 9% an international ferry trip in the last 12 months.

1.3 Attitudes towards technology

Attitudes towards the range of transport technologies varied considerably, with opinions often dependent on the specific application and perceived benefits versus concerns. When asked to select perceived advantages and disadvantages of electric vehicles and self-driving vehicles from a predefined list, people were more likely to select more disadvantages than advantages. Overall, environmental benefits were recognised across multiple technologies, but barriers around infrastructure, cost, safety, and lack of human control emerged as key themes influencing public opinion.

Electric vehicles were seen as offering environmental benefits (66% of people selected this advantage), with concerns remaining around charging infrastructure and range. 'Not enough charging points' remained the most selected disadvantage (72%), though concerns about cost to buy, run and maintain, knowing where and how to charge and negative impacts on the environment saw a statistically significant decrease from the previous wave. Overall, people selected nearly double the number of disadvantages compared to advantages.

Self-driving vehicles were recognised for their potential to reduce driver fatigue. However, people selected more than double the number of disadvantages compared to advantages. The most frequently selected disadvantages for personal use of self-driving vehicles were 'drivers will become lazy and pay less attention' (59%) and 'loss of driving skills' (59%). For public transport use, 'loss of jobs' was the primary disadvantage selected (63%).

Drones received strong support for emergency and safety applications, with 92% of people supporting their use for 'emergency response (e.g. search and rescue)'. However, support for the use of drones varied by application, dropping to 44% for 'leisure uses (e.g. flying drones for fun or to take pictures and videos)', 31% for 'retail use (stock checking)' and 28% for 'retail use (package delivery)'. Key concerns focused on 'the potential misuse of drones (e.g. hacking, terrorism, used by criminals)' (80%) and 'concerns about privacy and intrusion' (78%).

Sustainable aviation fuels faced similar awareness and cost sensitivity challenges. A third of people (33%) supported airlines charging higher fares for journeys using sustainable aviation fuel, while concerns about new plane technologies varied by type. Willingness to pay extra for short-haul flights using green alternatives showed similar patterns to ferries, with 48% willing to pay an extra £5, 47% willing to pay an extra £10, and declining to 37% for an extra £20.

New plane technologies, including battery-powered planes and hydrogen powered planes, highlighted different primary concerns among people in the UK. For battery-powered planes, the most frequently selected concern was 'concerns about the distance you can travel (e.g. battery life)' (63%), whereas for hydrogen powered planes, it was the 'risk of fire/combustion/explosion' (51%).

Green ferry alternatives received broad public acceptance, with 61% of people willing to travel on ferries powered by low carbon fuels. However, awareness of specific low carbon ferry technologies was relatively low, with almost half (49%) having never heard of ferries powered by ammonia. Willingness to pay extra (for green ferry alternatives) decreased as costs increased, from 48% willing to pay an extra £5 for short-haul ferry journeys powered by low carbon fuels, to 42% for an extra £10, and 35% for an extra £20.

Artificial intelligence in transport was not widely understood by the UK public, with around half of people unable to identify any advantages (46%) or disadvantages (51%). Among those who could highlight the advantages and disadvantages of AI being used in transport, the most frequently mentioned

advantage was ‘improvements to data processing/decisions/AI efficiency’ (18%), while the most cited disadvantage was ‘concerns about accuracy and errors’ (15%). A range of potential uses of AI in transport and travel received broad levels of support.

1.4 Report structure

This report covers each of these transport technologies in more detail but starts with car access and purchase intentions.

Summary boxes have been included at the start of each section to present key findings. These are annotated to signpost the reader to further information where it is available.

Full survey data has been published alongside this report.

2 Car access, purchase intentions

2.1 Summary

- In line with the previous wave, ownership of and access to cars or vans was high, with a majority of those living in car-owning households saying they personally owned or had continuous use of at least one vehicle. Nearly half said their household had two or more cars or vans (see section 2.2).
- Among those intending to buy or lease a car or van in the future, most expected to buy or lease a second-hand vehicle rather than a new one, consistent with the previous wave (see section 2.4).
- Petrol remained the most popular fuel type for future car or van purchases, followed by hybrids, diesel and electric/battery only. Intention to purchase or lease an electric/battery only car or van in the future saw a statistically significant increase of 3 percentage points from the previous wave (see section 2.5).
- Intention to buy or lease petrol or hybrid cars or vans remained strong regardless of when in the next five years the purchase was expected to occur. Compared to the previous wave, intention to buy or lease an electric/battery only car or van within 2 to 3 years saw a statistically significant increase of 5 percentage points, while long-term intention to buy or lease petrol saw a statistically significant decrease of 10 percentage points (see section 2.5).

2.2 Ownership of licences and cars

In Spring 2025, 81% of people aged 17 and over said they hold a full UK driving licence. This increase was statistically significant compared to 79% in Autumn 2024. However, the proportions of people who said they hold a provisional licence (7%) and those who did not hold a valid UK driving licence (11%) remained stable with the previous wave (8% and 11%, respectively).

Household car ownership and usage remained stable compared to the previous wave. In Spring 2025, most people aged 16 and over (85%) said their household owned or had continuous use of at least one car or van, compared to 86% in Autumn 2024. Forty-seven percent said their household owned or had continuous use of two or more cars or vans, up from 45% in Autumn 2024.

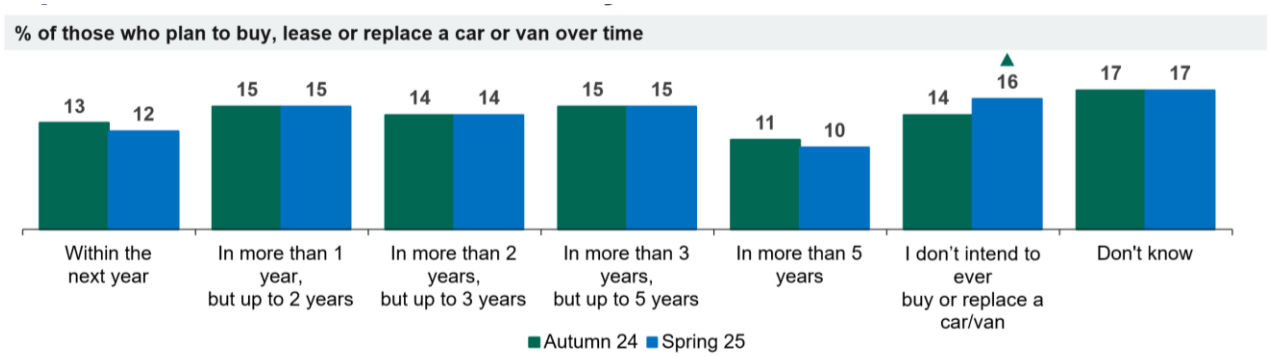
A majority (85%) of those who lived in a household that had a car or van said they *personally* owned or had continuous use of at least one car or van (a minority, 14%, did not). This increased slightly from 82% in Autumn 2024.

2.3 Purchase/lease intentions

Consistent with Autumn 2024, in Spring 2025, over two-thirds of people in the UK (67%) said they would personally buy, lease or replace a new or second-hand car or van in the future. Almost 6 in 10 people (57%) said they would purchase a vehicle within the next five years, and a further 10% in more than five years' time, as shown in **Figure 2.1**.

Spring 2025 saw an increase in people saying they don't intend to ever buy or replace a car or van (16%) compared to 14% in Autumn 2024.

Figure 2.1: Vehicle purchase intentions by year of expected purchase



Q104 [Postal survey Q6]. When, if at all, do you think you will personally next buy, lease or replace a car or van, either new or second hand?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4053, Autumn 24: 7091)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

- Men were more likely than women to say they will buy or replace a car or van within the next year (14% compared to 11%).
- Those aged 70+ were more likely to say they never intend to buy or replace a car or van in the future (32%) compared to those aged 16-29 (9%), 30-49 (12%) and 50-69 (14%).
- Those living in Scotland were more likely to say they never intend to buy or replace a car or van in the future (22%) compared to those in England (15%).
- Those from the highest income households (earning £100,000 and above per annum) were more likely to say they will buy or replace a car or van within the next year (20%) compared to those in households earning less than £100,000 per annum (12%).

2.4 New or second-hand?

Among those who intended to buy or lease a car or van at some point in the future, the proportion in Spring 2025 who expected this to be new (24%) remained stable compared to Autumn 2024 (24%). Just over seven in ten (71%) said their next car or van would most likely be second-hand.

In Spring 2025, there was a decrease in people saying they ‘don’t know’ if the car or van will be new or second-hand (5%), compared to 7% in Autumn 2024.

- Adults aged 50+ were more likely to intend to buy or lease a new car or van (30%) compared to younger age groups, aged 16-29 (13%) and 30-49 (23%). Conversely, those aged 16-29 were more likely to intend to buy or lease a second-hand vehicle (81%) compared to those aged 30-49 (72%), 50-69 (66%) and 70+ (62%).

- People who intended to buy or lease a hybrid or electric/battery only car or van next, were more likely to say it would be new (28% and 50%, respectively), compared to those who intended to buy or lease a petrol (19%) or diesel (9%) car or van. Conversely, those who intended to buy or lease a diesel or petrol car or van next, were more likely to say it would be second-hand (89% and 77%, respectively), compared to those who intended to buy or lease a hybrid (66%) or electric/battery only (46%) car or van.

- Those who intended to buy or lease a vehicle within the next year were more likely to say it would be new (31%) compared to those who intended to do this in more than 3 years (17%).

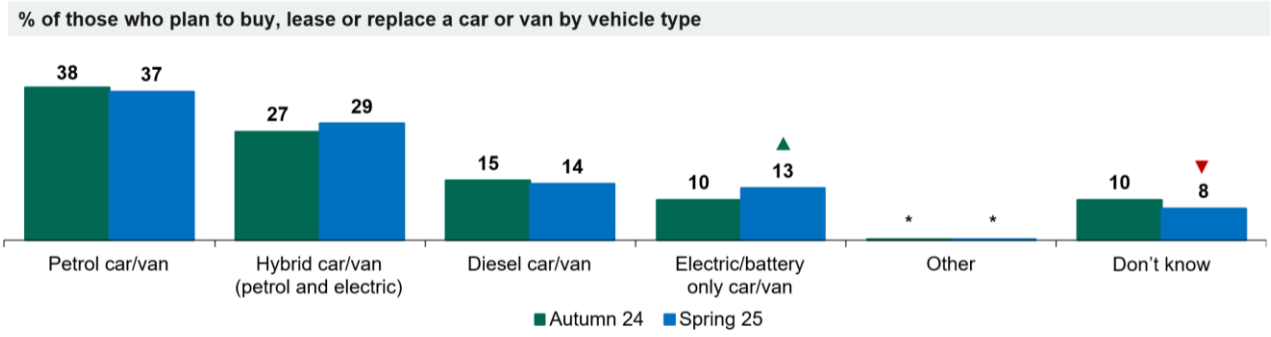
2.5 Vehicle type

Around one in eight people in the UK (13%) who intended to buy, lease or replace a car in the future said it will be an electric/battery only car or van, which is an increase of 3 percentage points from 10% in Autumn 2024, as shown in **Figure 2.2**.

Around one in twelve (8%) did not know which car or van type they would choose in the future, down two percentage points from 10% in Autumn 2024.

Plans to buy, lease or replace other engine types remained consistent with the previous wave, with people being more likely to select petrol car or van (37%), compared to a hybrid (29%) or diesel (14%) car or van.

Figure 2.2: Vehicle type purchase intentions



Q106 [Postal survey Q8]. What type of car or van do you think you will most likely purchase or lease next time?
Base: All 16+ in UK who intend to buy or replace a car/van (unweighted valid responses, Spring 25: 2734, Autumn 24: 4888)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

Petrol vehicles

- People aged 16-20 were more likely to intend to buy or lease a petrol car or van next time (56%) compared to those aged 30-69 (31%). This was also the case for those aged 21-29 (49%) and 70+ (42%).
- People from the lowest income households earning up to £25,999 per annum were more likely to intend to buy or lease a petrol car or van next (48%) compared to those earning £26,000 and above per annum (33%).
- Those who intended to buy or lease a second-hand car or van were more likely to choose petrol (40%) compared to those who intended to buy or lease a new car or van (29%).

Electric vehicles

- People working full-time were more likely to intend to buy or lease an electric/battery only car or van next (15%) compared to those who were retired (11%).
- London residents were more likely to intend to buy or lease an electric/battery only car or van next time (22%) compared to those living in all other regions of England (12%).
- People from the highest income households earning £100,000 and above per annum were more likely to intend to buy or lease an electric/battery only car or van next (33%) compared to those in

lower income households (7% in households earning up to £25,999 per annum, 6% in households earning between £26,000-£51,999 and 14% in households earning between £52,000-£99,999 per annum).

- People living in households with no cars or vans were more likely to intend to buy or lease an electric/battery only car or van next (23%) compared to those in households with one or more cars (12%).

Diesel vehicles

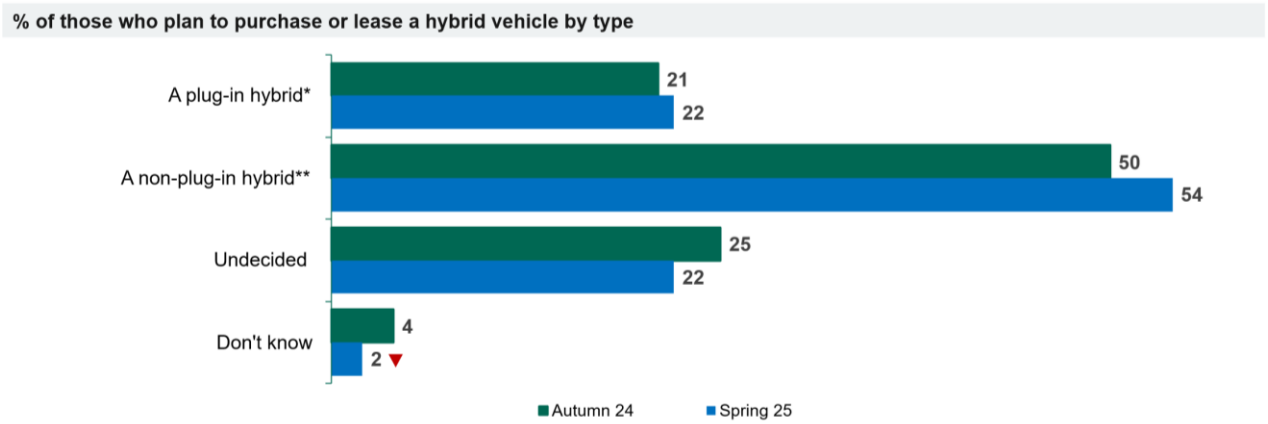
- Men were more likely than women to say they will buy or lease a diesel car or van next time (17% and 10%, respectively).
- Rural residents were more likely to intend to buy or lease a diesel car or van next (20%) compared to urban residents (12%).
- People with two or more cars or vans in the household were more likely to intend to buy or lease a diesel car or van next (16%) compared to those with one car or no cars (10%).

Hybrid vehicles

- People aged 30+ were more likely to say they will buy or lease a hybrid car or van next time (32%) compared to those aged 16-29 (17%).
- London residents were more likely to intend to buy or lease a hybrid car or van next time (36%) compared to those living in all other regions of England (28%).

Those who intended to buy or lease a new car or van were more likely to choose hybrid (34%) compared to those who intended to buy or lease a second-hand car or van (27%).Of people who said they would most likely buy or lease a hybrid car or van next time, a similar proportion said it would be a plug-in hybrid or a non-plug-in hybrid in Spring 2025 compared to Autumn 2024, as shown in **Figure 2.3**. Over half (54%) said it would be a non-plug-in hybrid, around a fifth (22%) said they would purchase a plug-in hybrid and a further 22% were undecided.

Figure 2.3: Hybrid vehicle type purchase intentions



* Plug-in hybrid (that plugs into an external power source to charge)
** Non-plug-in hybrid (that recharges while driving and is ultimately fuelled by petrol or diesel – it cannot be plugged into an external power source)

Q107 [Postal survey Q9]. What type of hybrid car or van do you think you will most likely purchase or lease next time?
Base: All 16+ in UK who will most likely purchase a hybrid car/van (unweighted valid responses, Spring 25: 847, Autumn 24: 1464)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

- Men were more likely than women to say they will buy or lease a plug-in hybrid car or van (27% and 17%, respectively).
- People from the highest income households earning £100,000 or more per annum were more likely to intend to buy or lease a plug-in hybrid (41%) compared to those in lower income households earning up to £51,999 per annum (16%). Conversely, those from households earning up to £51,999 per annum were more likely to prefer a non-plug-in hybrid (61%) compared to the highest income households earning £100,000 or more per annum (34%).
- People who were retired were more likely to say they will buy or lease a non-plug-in hybrid car or van (61%) compared to those working full-time (50%). Conversely, those working full-time were more likely to buy or lease a plug-in hybrid car or van (27%) compared to those working part-time (15%) and those who were retired (16%).

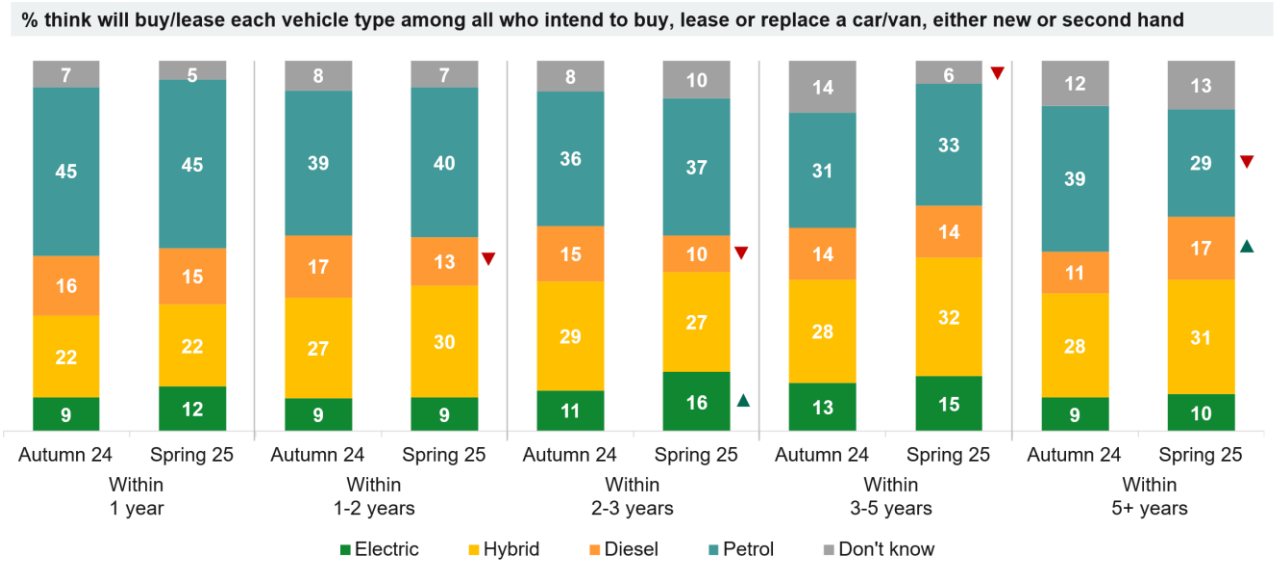
There were some key shifts in vehicle purchase and lease intention between Autumn 2024 and Spring 2025, as seen in **Figure 2.4**. Intention to buy or lease an electric vehicle 'within 2 to 3 years' saw a statistically significant increase from 11% to 16%. Intention to buy or lease a petrol car or van 'in more than five years' saw a statistically significant decline from 39% to 29%. Finally, whilst diesel purchase and lease intentions saw a reduction in the short-term compared to Autumn 2024, intention to buy or lease in more than 5 years increased from 11% to 17%.

In Spring 2025, among people expecting to buy or lease a car or van 'within one year', 45% expected to choose a petrol car or van, 22% a hybrid, 15% a diesel and 12% an electric/battery only car or van, in line with Autumn 2024.

In contrast, among people expecting to buy or lease a car or van 'in more than 5 years', 31% expected to choose a hybrid car or van, 29% a petrol, 17% a diesel and 10% an electric/battery only car or van.

Those intending to buy or lease a car or van 'in more than 5 years' were more likely not to know (selected 'don't know') what type of car or van it would be, compared to those buying or leasing one in the next year (13% compared to 5%).

Figure 2.4: Vehicle type purchase intentions by year of expected purchase



Q104 [Postal survey Q6]. When, if at all, do you think you will personally next buy, lease or replace a car or van, either new or second hand?
Base: All 16+ in UK (unweighted valid responses, Spring 2025: 4053, Autumn 24: 7082)
Q106 [Postal survey Q8]. What type of car or van do you think you will most likely purchase or lease next time?
Base: All 16+ in UK who intend to buy or replace a car or van (unweighted valid responses, Spring 2025: 2734, Autumn 24: 4878)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

3 Electric vehicles

3.1 Summary

- Awareness and self-reported knowledge of EVs was high, in line with Autumn 2024. Almost everyone said they had heard of them (see section 3.2).
- 'Environmental benefits' continued to be the most selected advantage from the list of potential advantages of EVs, followed by EVs being 'less noisy' and having 'reduced road tax'. 'Reduced road tax' saw a statistically significant decrease in people selecting it as an advantage in Spring 2025, compared to Autumn 2024 (see section 3.3).
- 'Not enough charging points' continued to be the most selected disadvantage of EVs. Followed by 'less distance can be travelled on one charge' and the 'cost to buy'. 'Cost to buy', 'knowing where and how to charge', 'expensive to run or maintain' and 'negative impacts on the environment' saw a statistically significant decrease in people selecting them as disadvantages in Spring 2025, compared to Autumn 2024 (see section 3.4).

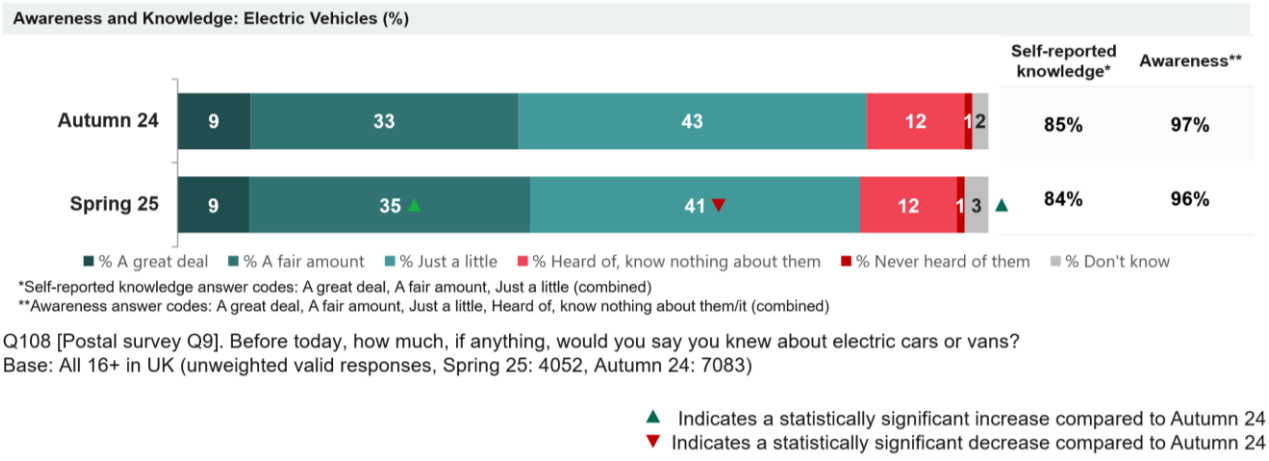
3.2 Awareness and knowledge

'Awareness' encompasses all people who had heard of EVs, including those who say they have 'heard of but know nothing about them', and those who say they know 'just a little', 'a fair amount' or 'a great deal'. 'Self-reported knowledge' is confined to those who said that they know 'just a little', 'a fair amount' or 'a great deal'.

In Spring 2025, overall levels of awareness and self-reported knowledge of electric vehicles (EVs) were in line with the Autumn 2024 wave, as shown in **Figure 3.1.** However, Spring 2025 saw a small increase in people in the UK saying they know 'a fair amount' (35% compared to 33%) and a decrease in people saying they know 'just a little' (41% compared to 43%).

Almost everyone said they had heard of EVs – 96% said this (including those who had heard of them but knew nothing about them). Only a small minority of people were not aware of them (1% had 'never heard of them' and 3% selected 'don't know').

Figure 3.1: Awareness and knowledge of electric vehicles



Q108 [Postal survey Q9]. Before today, how much, if anything, would you say you knew about electric cars or vans?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052, Autumn 24: 7083)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

- Men were more likely than women to have higher levels of awareness (98% and 95%, respectively), higher levels of self-reported knowledge (92% and 78%, respectively) and to say they know a 'great deal' or 'fair amount' about electric vehicles (60% and 29%, respectively).

- People aged 16-29, 30-49 and 50-59 were more likely to say they know a 'great deal' or a 'fair amount' about electric vehicles (45%, 43% and 47%, respectively) compared to those aged 70+ (35%).

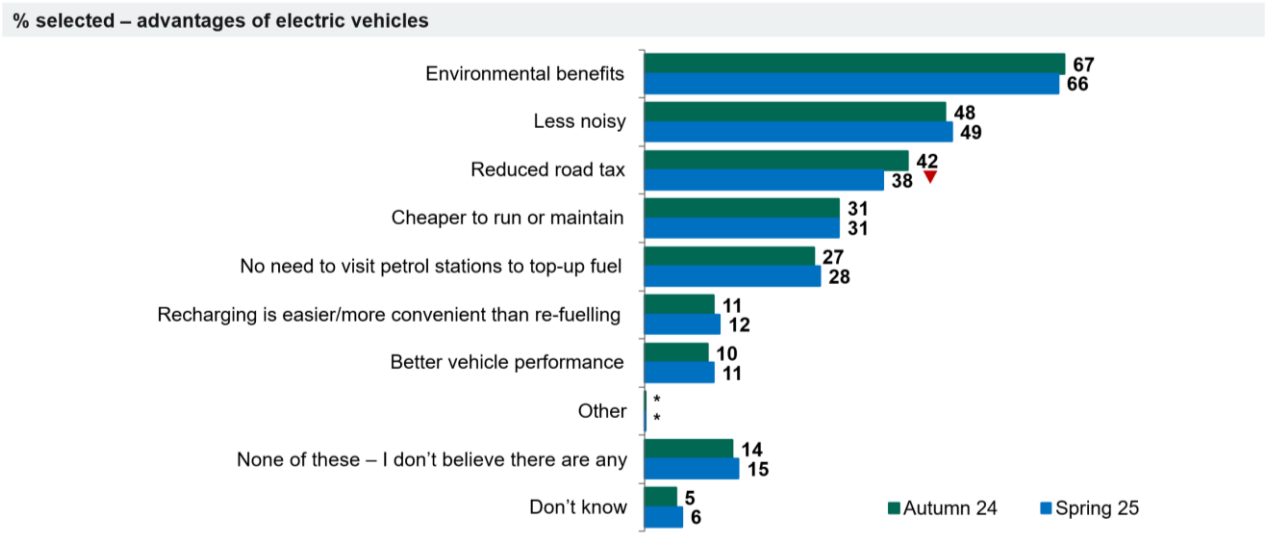
- People living in England and Scotland were more likely to say they know a 'great deal' or 'fair amount' about electric vehicles (43% and 48%, respectively) compared to those in Wales (35%).

3.3 Advantages – prompted

Consistent with the previous wave, in Spring 2025, when shown a list of potential advantages of EVs over petrol or diesel cars or vans, 'environmental benefits' was the most frequently selected advantage (66%), followed by 'less noisy' (49%), as shown in **Figure 3.2**. Whilst the third most selected advantage also remained consistent between waves, Spring 2025 saw a statistically significant decrease in people selecting 'reduced road tax' as an advantage (38%) compared to Autumn 2024 (42%).

On average, people selected two advantages of EVs, remaining stable from Autumn 2024.

Figure 3.2: Advantages of electric vehicles



Q111 [Postal survey Q10]. Which of the following, if any, do you think are advantages of fully electric over petrol or diesel cars or vans?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4055, Autumn 24: 7091)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

- Men were more likely than women to select being 'less noisy' as an advantage of electric vehicles (52% compared to 45%), having 'reduced road tax' (41% compared to 35%), being 'cheaper to run or maintain' (34% compared to 28%) and having 'better vehicle performance' (16% compared to 8%).

- People aged 16-29 and 30-49 were more likely to select 'environmental benefits' as an advantage of electric vehicles (73% and 69%, respectively) compared to those aged 50-69 (62%) and 70+ (58%). London residents were also more likely to select this as an advantage (75%) compared to those living in all other regions of England (65%).

- People aged 16-29 were more likely to select 'recharging is easier/more convenient than re-fuelling' as an advantage (18%) compared to older age groups (13% aged 30-49, 10% aged 50-69 and 10% aged 70+). Similarly, they were more likely to select 'better vehicle performance' as an advantage (20%) compared to older age groups (12% aged 30-49, 9% aged 50-69 and 4% aged 70+).

- People from the highest income households earning £100,000 or more per annum selected more advantages on average (3.3) compared to those in lower income households (2.0 in households earning up to £25,999, 2.5 in households earning between £26,000-£51,999 and 2.7 in households earning between £52,000-£99,999).

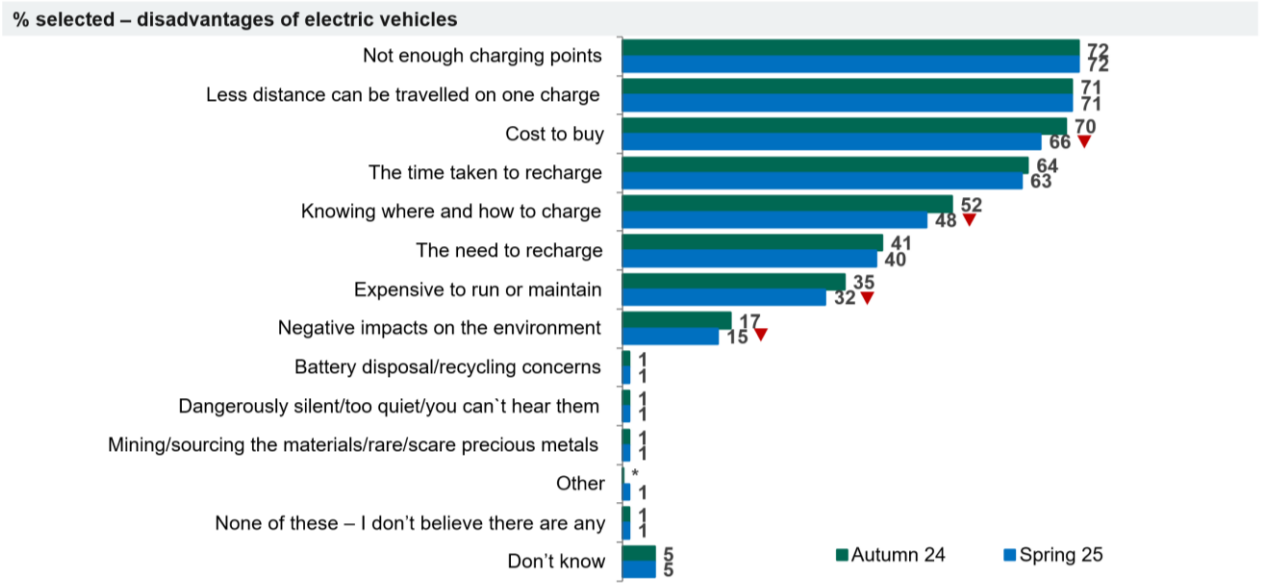
- For perceived advantages of electric vehicles, those whose main vehicle was an EV were more likely to select all advantages compared to the UK average. For example, those whose main vehicle was an EV were more likely to highlight the 'environmental benefits' (89%) compared to the UK average (66%). Additionally, they were more likely to select that EVs are 'less noisy' (80%) compared to the UK average (49%).

3.4 Disadvantages – prompted

Consistent with the previous wave, in Spring 2025, when shown a list of potential disadvantages of EVs over petrol or diesel cars or vans, 'not enough charging points' was the most frequently selected disadvantage (72%), followed by 'less distance can be travelled on one charge' (71%), as shown in **Figure 3.3**. Whilst the third most selected disadvantage also remained consistent between waves, Spring 2025 saw a statistically significant decrease in people selecting 'cost to buy' as a disadvantage (66%) compared to Autumn 2024 (70%).

When thinking about the perceived advantages and disadvantages of EVs, people selected double the number of disadvantages compared to advantages. On average, there were four disadvantages selected for EVs compared to two advantages, consistent with Autumn 2024.

Figure 3.3: Disadvantages of electric vehicles



Q113 [Postal survey Q11]. Which of the following, if any, do you think are disadvantages of fully electric over petrol or diesel cars or vans?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4054, Autumn 24: 7091)

▲ Indicates a statistically significant increase compared to Autumn 24
▼ Indicates a statistically significant decrease compared to Autumn 24

- For several perceived disadvantages of electric vehicles, men were more likely than women to select these. For example, men were more likely to select there are ‘not enough charging points’ (76%) compared to women (68%). However, women were more likely than men to select ‘the need to recharge’ as a disadvantage (42% and 38%, respectively).

- For several perceived disadvantages, people aged 50-69 were more likely than other age groups to select these. For example, they were more likely to say, ‘less distance can be travelled on one charge’ (78%) compared to those aged 16-29 (65%), 30-49 (69%) and 70+ (70%). People aged 50-69 were also more likely to select ‘not enough charging points’ (77%) compared to those aged 16-29 (66%), 30-49 (70%) and 70+ (72%). They were also more likely to select ‘cost to buy’ (70%) compared to those aged 16-29 (62%) and 30-49 (66%).

- People working full-time were more likely to select a range of disadvantages compared to other working groups, especially those not working. For example, they were more likely to say ‘not enough charging points’ (75%) compared to those not working (59%).

- People living in Yorkshire and the Humber were more likely to say ‘not enough charging points’ (79%) compared to those in London (68%), North-East (68%), North-West (67%) and West Midlands (67%).

- Rural residents selected more disadvantages on average (4.5) compared to urban residents (4.1).

- For several perceived disadvantages, people whose main vehicle was an EV were **less likely** to select these compared to the UK average. For example, they were less likely to highlight that there are ‘not enough charging points’ (57%) compared to the UK average (72%).

4 Self-driving vehicles (SDVs)

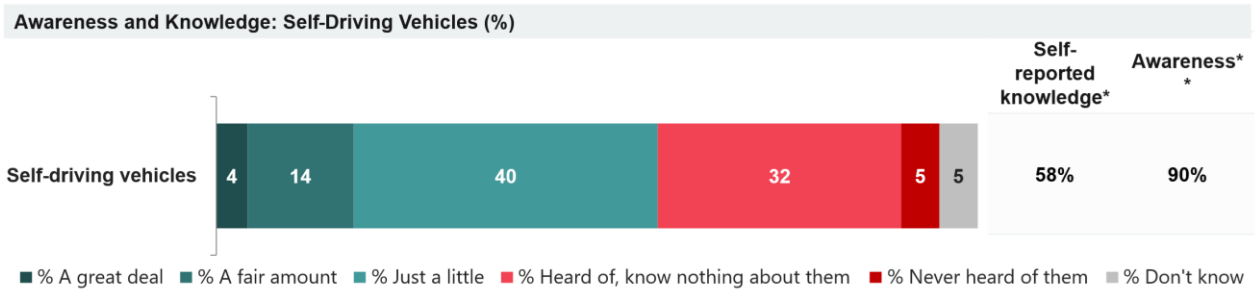
4.1 Summary

- Awareness of self-driving vehicles (SDVs) was high, with nine in ten people saying they had heard of them. Self-reported knowledge was lower - almost six in ten people claimed to know 'a great deal', 'fair amount' or 'just a little' (see section 4.2).
- The most frequently selected advantage of SDVs for both personal and public transport use was 'less driver fatigue' (see sections 4.3 and 4.5).
- The most frequently selected disadvantages of SDVs for personal use were 'drivers will become lazy and pay less attention' and 'loss of driving skills'. For public transport use, 'loss of jobs' was the most frequently selected disadvantage (see sections 4.4 and 4.6).

4.2 Awareness and knowledge for personal use

Awareness of self-driving vehicles (SDVs) was high in Spring 2025 (90%), as shown in **Figure 4.1.** Almost six in ten (58%) of people in the UK claimed self-reported knowledge about SDVs (stating they know 'a great deal', 'fair amount' or 'just a little').

Figure 4.1: Awareness and knowledge of self-driving vehicles



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little (combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it (combined)

Q117 [Postal survey Q12]. Before today, how much, if anything, would you say you knew about self-driving vehicles?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)

- Men were more likely than women to have higher levels of awareness (94% and 87%, respectively), higher levels of self-reported knowledge (72% and 46%, respectively) and to say they know a 'great deal/fair amount' about self-driving vehicles (30% and 7%, respectively).
- People aged 16-29 were more likely to say they know a 'great deal/fair amount' about self-driving vehicles (28%) compared to those aged 30-49 (20%), 50-69 (15%) and 70+ (9%).
- People living in England had higher levels of self-reported knowledge (59%) compared to those in Wales (47%).
- London residents had higher levels of self-reported knowledge (66%) compared to those living in all other regions of England (58%).
- People from the highest income households earning £100,000 and above per annum had higher levels of self-reported knowledge (72%) compared to those in lower income households (53% in

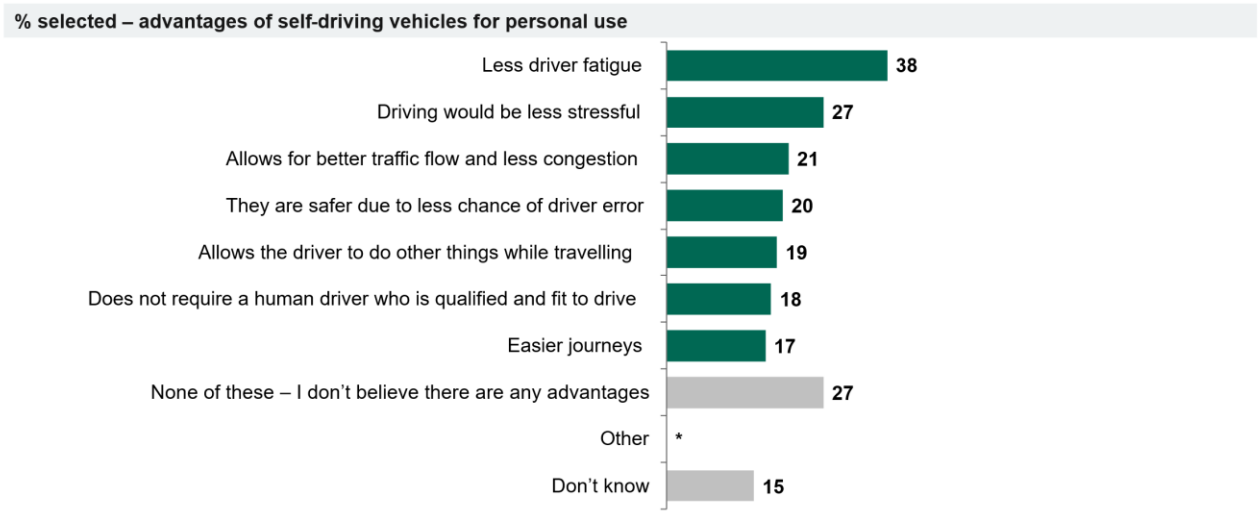
households earning up to £25,999, 59% in households earning between £26,000-£51,999 and 63% in households earning between £52,000-£99,999).

- People in education had higher levels of self-reported knowledge (75%) compared to those working full-time (63%), those who were retired (56%), those working part-time (49%) and those not working (49%).

4.3 Advantages for personal use – prompted

In Spring 2025, the most frequently selected advantage of SDVs for personal use was 'less driver fatigue' (38%), as shown in **Figure 4.2.** The next most selected advantages were 'driving would be less stressful' (27%), 'allows for better traffic flow and less congestion' (21%) and 'they are safer due to less chance of driver error' (20%).

Figure 4.2: Advantages of self-driving vehicles for personal use



Q150 [Postal survey Q13]. Which of the following, if any, do you think are advantages of self-driving vehicles that are available for personal use such as cars and vans?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)

- For several perceived advantages of SDVs for personal use, men were more likely than women to select these. For example, men were more likely to select 'less driver fatigue' (45%) compared to women (33%). Men also selected more advantages on average (1.9) compared to women (1.3). Women were not more likely to select any advantages compared to men.

- For several perceived advantages, people aged 16-29 were more likely than older age groups to select them. For example, they were more likely to select that self-driving vehicles 'allow the driver to do other things while travelling' (31%) compared to those aged 30-49 (21%), 50-69 (18%) and 70+ (7%). People aged 16-29 were also more likely to select 'easier journeys' (28%) compared to those aged 30-49 (20%), 50-69 (13%) and 70+ (7%). Meanwhile, those aged 70+ were more likely to think that 'none of these are advantages' of self-driving vehicles (40%) compared to those aged 16-29 (18%), 30-49 (22%) and 50-69 (31%).

- London residents selected more advantages on average (2.1) compared to those living in all other regions of England (1.5).

- People from the highest income households earning £100,000 and above per annum selected more advantages on average (2.5) compared to those in lower income households (1.3 in

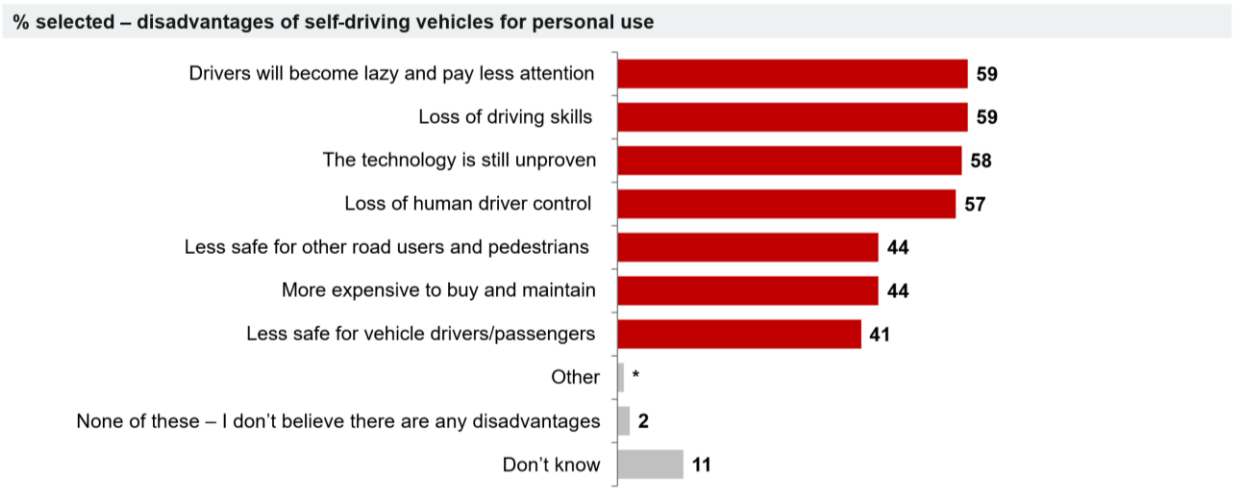
households earning up to £25,999, 1.6 in households earning between £26,000-£51,999 and 1.9 in households earning between £52,000-£99,999).

4.4 Disadvantages for personal use – prompted

In Spring 2025, the most frequently selected disadvantages of SDVs for personal use were 'drivers will become lazy and pay less attention' (59%) and 'loss of driving skills' (59%), as shown in **Figure 4.3.** The next most selected disadvantages were 'the technology is still unproven' (58%) and 'loss of human driver control' (57%).

When thinking about the perceived advantages and disadvantages of SDVs for personal use, people selected more than double the number of disadvantages compared to advantages. In Spring 2025, on average, there were 3.6 disadvantages selected compared to 1.6 advantages.

Figure 4.3: Disadvantages of self-driving vehicles for personal use



Q151 [Postal survey Q14]. Which of the following, if any, do you think are disadvantages of self-driving vehicles that are available for personal use such as cars and vans?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)

- Men were more likely than women to say the disadvantages of SDVs for personal use are that 'drivers will become lazy and pay less attention' (62% and 57%, respectively), 'loss of driving skill' (62% and 57%, respectively) and 'the technology is still unproven' (62% and 55%, respectively).

- People aged 16-29 were more likely to select SDVs are 'less safe for other road users and pedestrians' (54%) compared to those aged 30-49 (39%), 50-69 (42%) and 70+ (43%). Similarly, they were more likely to say that they are 'less safe for vehicle drivers/passengers' (51%) compared to those aged 30-49 (39%), 50-69 (40%) and 70+ (39%).

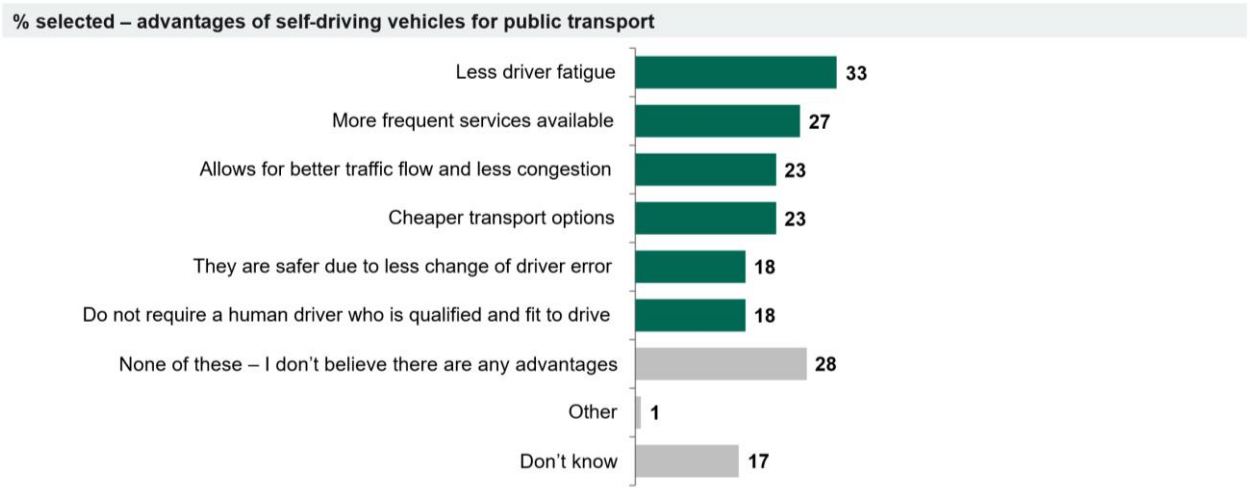
- For several perceived advantages of SDVs for personal use, people living in the South-East were more likely than those in other regions of England to select them. For example, they were more likely to say, 'drivers will become lazy and pay less attention' (65%) compared to those in Yorkshire and the Humber (51%), London (52%) and North-East (55%). Similarly, they were more likely to say, 'the technology is still unproven' (64%) compared to those in the North-East (49%), North-West (56%), West Midlands (56%) and London (52%).

- People working full-time and those in education selected more disadvantages on average (3.9 and 4.1, respectively) compared to those who were retired (3.5) and those not working (3.1).

4.5 Advantages for public transport – prompted

When shown a list of potential advantages of SDVs for public transport, 'less driver fatigue' was the advantage selected most frequently (33%), as shown in **Figure 4.4.** 'More frequent services available' (27%), 'allows for better traffic flow and less congestion' (23%) and 'cheaper transport options' (23%) were the next most frequently selected advantages.

Figure 4.4: Advantages of self-driving vehicles for public transport



Q152 [Postal survey Q15]. Which of the following, if any, do you expect to be advantages of self-driving vehicles that are used for public transport such as self-driving buses and taxis?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4049)

- For several perceived advantages of SDVs for public transport, men were more likely than women to select these. For example, men were more likely than women to say they would 'allow for better traffic flow and less congestion' (29% compared to 17%). They were also more likely to say they are 'safer due to less chance of driver error' (23% compared to 13%).

- For several perceived advantages of SDVs for public transport people aged 16-29 were more likely than older age groups to select them. For example, they were more likely to say there will be 'more frequent services available' (43%) compared to those aged 30-49 (29%), 50-69 (22%) and 70+ (12%). People aged 16-29 were also more likely to say it will mean 'cheaper transport options' (37%) compared to those aged 30-49 (22%), 50-69 (19%) and 70+ (13%).

- People living in England were more likely to select 'cheaper transport options' as an advantage of SDVs for public transport (23%) compared to those in Scotland (17%).

- London residents were more likely to select 'less driver fatigue' as an advantage of SDVs for public transport (41%) compared to those living in all other regions of England (32%). They were also more likely to select that they are 'safer due to less chance of driver error' (26%) compared to those living in other areas of England (17%).

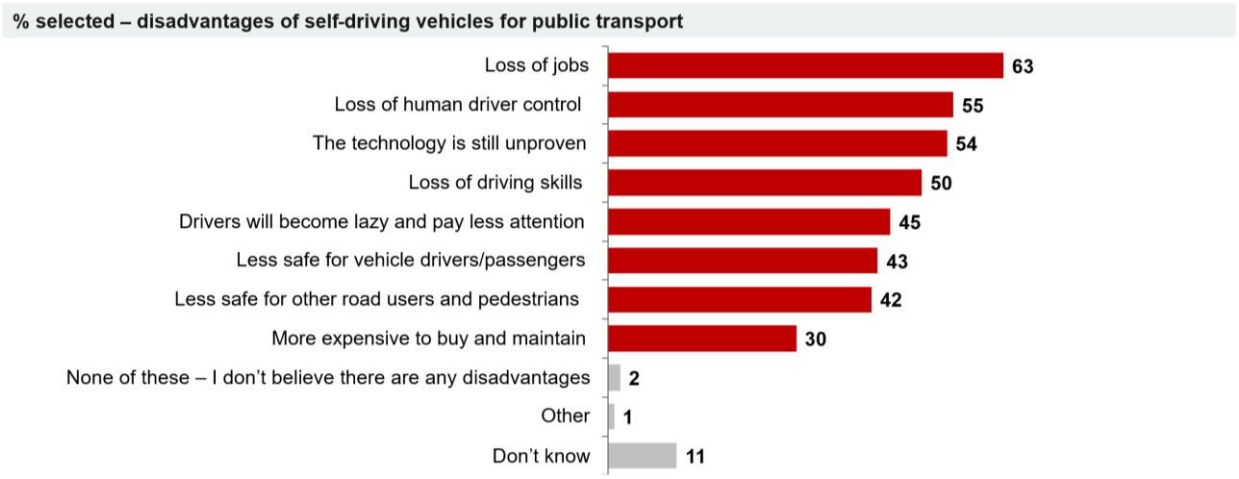
- People from the highest income households earning £100,000 or more per annum were more likely to select a range of advantages of SDVs for public transport compared to those in lower income households. For example, they were more likely to select that they will 'allow for better traffic flow and less congestion' (42%) compared to those in households earning up to £25,999 (17%), between £26,000-£51,999 (22%) and between £52,000-£99,999 (28%).

4.6 Disadvantages for public transport – prompted

When shown a list of potential disadvantages of SDVs for public transport, 'loss of jobs' was the most frequently selected by people, selected by 63%, as shown in **Figure 4.5**. The next most frequently selected disadvantages were 'loss of human driver control' (55%), 'the technology is still unproven' (54%) and 'loss of driving skills' (50%).

When thinking about the perceived advantages and disadvantages of SDVs for public transport, people selected more disadvantages than advantages, similar to SDVs for personal use. On average, there were 3.8 disadvantages selected compared to 1.4 advantages.

Figure 4.5: Disadvantages of self-driving vehicles for public transport



Q153 [Postal survey Q16]. Which of the following, if any, do you expect to be advantages of self-driving vehicles that are used for public transport such as self-driving buses and taxis?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4050)

- Men were more likely than women to select as disadvantages of SDVs for public transport that 'the technology is still unproven' (58% compared to 51%), 'loss of driving skills' (53% compared to 48%) and they are 'more expensive to buy and maintain' (33% compared to 28%).

- People aged 16-29 were more likely to select as a disadvantage of SDVs for public transport that they are 'less safe for vehicle drivers/passengers' (51%) compared to those aged 30-49 (39%), 50-69 (43%) and 70+ (38%). People aged 16-29 were also more likely to say that they are 'less safe for other road users and pedestrians' (50%) compared to those aged 30-49 (38%), 50-69 (42%) and 70+ (40%). Conversely, those aged 50-69 were more likely to select 'the technology is still unproven' (61%) compared to those aged 70+ (55%), 16-29 (51%) and 30-49 (49%).

- People living in Eastern England were more likely to select 'loss of jobs' as a disadvantage of SDVs for public transport (71%) compared to those in West Midlands (58%), North-West (59%), South-West (60%), London (61%) and Yorkshire and the Humber (62%). Conversely, those in the East Midlands were more likely to select 'loss of driving skills' (63%) compared to those in London (40%), North-West (44%), Yorkshire and the Humber (49%), North-East (50%), West Midlands (51%) and South-East (52%).

5 Drones

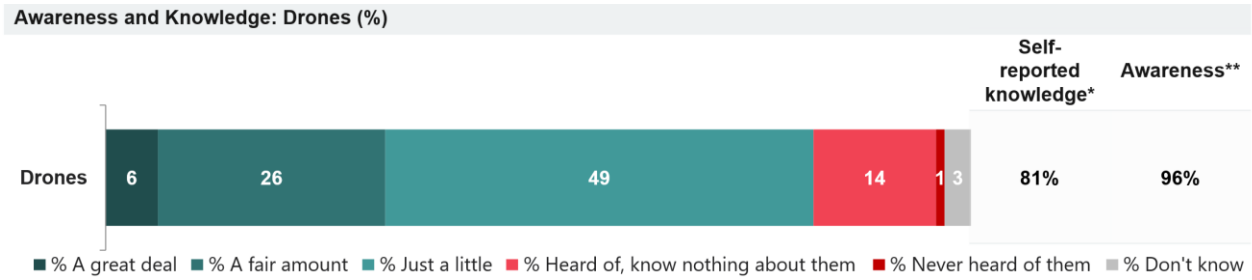
5.1 Summary

- Awareness and self-reported knowledge of drones was high. Almost everyone said they had heard of them (see section 5.2).
- Among those aware of drones, over half were aware of several drone uses. People were mostly aware that they are being used for 'leisure (e.g. flying drones for fun or to take pictures and videos)', 'armed forces/military use (e.g. surveillance, air strikes)' and 'professional photography, filming and journalism' (see section 5.3).
- Most people supported the use of drones for a range of uses, particularly for 'emergency response (e.g. search and rescue)', 'police use (e.g. monitoring boarders, surveillance)' and 'distributing medical supplies (e.g. medicines, blood supplies)' (see section 5.4).
- 'The potential misuse of drones (e.g. hacking terrorism, used by criminals)' and 'concerns about privacy and intrusion' were the most selected concerns from the list of potential concerns of drones (see section 5.5).

5.2 Awareness and knowledge

In Spring 2025, levels of awareness of drones were high, with almost everyone saying they had heard of them (96%), as shown in **Figure 5.1.** Self-reported knowledge was also high, with just over four in five (81%) saying they knew a 'great deal', 'fair amount' or 'just a little' about drones.

Figure 5.1: Awareness and knowledge of drones



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little (combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it (combined)
Q130 [Postal survey Q17]. Before today, how much, if anything, would you say you knew about drones?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4045)

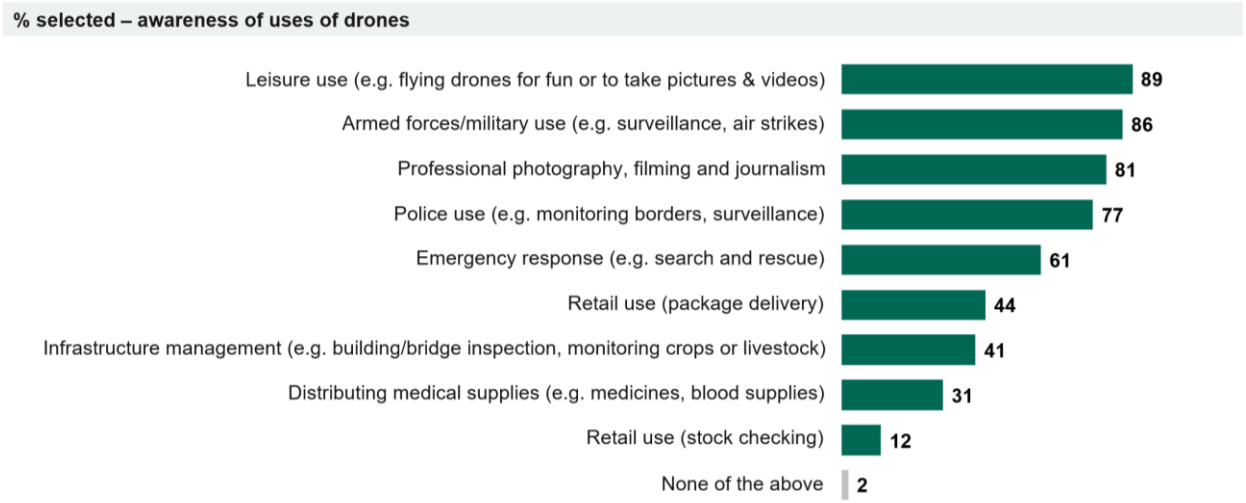
- Men were more likely to say they know a 'great deal/fair amount' about drones (45%) compared to women (20%). Conversely, one-fifth (20%) of women said they had 'heard of, but know nothing about them' compared to men (8%).
- People aged 16-29 were more likely to say they know a 'great deal/fair amount' about drones (42%) compared to those aged 30-49 (35%), 50-69 (28%) and 70+ (21%).
- People living in urban areas were more likely to say they know a 'great deal/fair amount' about drones (33%) compared to those in rural areas (29%). However, rural residents were more aware of drones (99%) compared to urban residents (95%).

5.3 Awareness of uses of drones

In Spring 2025, people in the UK who were aware of drones were shown a list of uses. Over half were aware of several of these drone uses, as shown in **Figure 5.2**. The highest awareness was of drones being used for 'leisure (e.g. flying drones for fun or to take pictures and videos)' (89%), 'armed forces/military use' (86%), 'professional photography, filming and journalism' (81%), 'police use (e.g. monitoring borders, surveillance)' (77%) and 'emergency response (e.g. search and rescue)' (61%).

The drone uses people were less aware of were 'retail use (package delivery)' (44%), 'infrastructure management (e.g. building/bridge inspection, monitoring crops or livestock)' (41%), 'distributing medical supplies (e.g. medicines, blood supplies)' (31%) and 'retail use (stock checking)' (12%).

Figure 5.2: Awareness of uses of drones



Q132 [Postal survey Q18]. Which of these uses of drones, if any, have you personally heard of before today?
Base: All 16+ in UK who had heard of drones before (unweighted valid responses, Spring 25: 3867)

- Men were more likely than women to have heard of almost all drone uses. For example, they were more likely to have heard of drones being used for 'retail use (package delivery)' (54% compared to 34%), 'infrastructure management' (53% compared to 31%) and 'distributing medical supplies' (38% compared to 25%).

- For several drone uses, older age groups were more likely than younger age groups to have heard of them. For example, those aged 50-69 and 70+ were more likely to have heard of drones being used for 'emergency response' (67% and 71%, respectively) compared to those aged 16-29 (49%) and 30-49 (58%). People aged 50-69 and 70+ were also more likely to have heard of drones being used for 'armed forces/military' (89% and 90%, respectively) compared to those aged 16-29 (80%) and 30-49 (84%).

- People living in South England were more likely than those in the North or Midlands to have heard of a range of drone uses. For example, those in South England were more likely to have heard of drones being used to 'distribute medical supplies' (34%) compared to those in the North (27%) and Midlands (25%).

- People from higher income households were more likely to have heard of several drone uses compared to those in the lowest income households. For example, those earning between £26,000-£51,999, £52,000-£99,999 and £100,000 and above per annum were more likely to have heard of drones being used for 'leisure' (91%, 93% and 91%, respectively) compared to

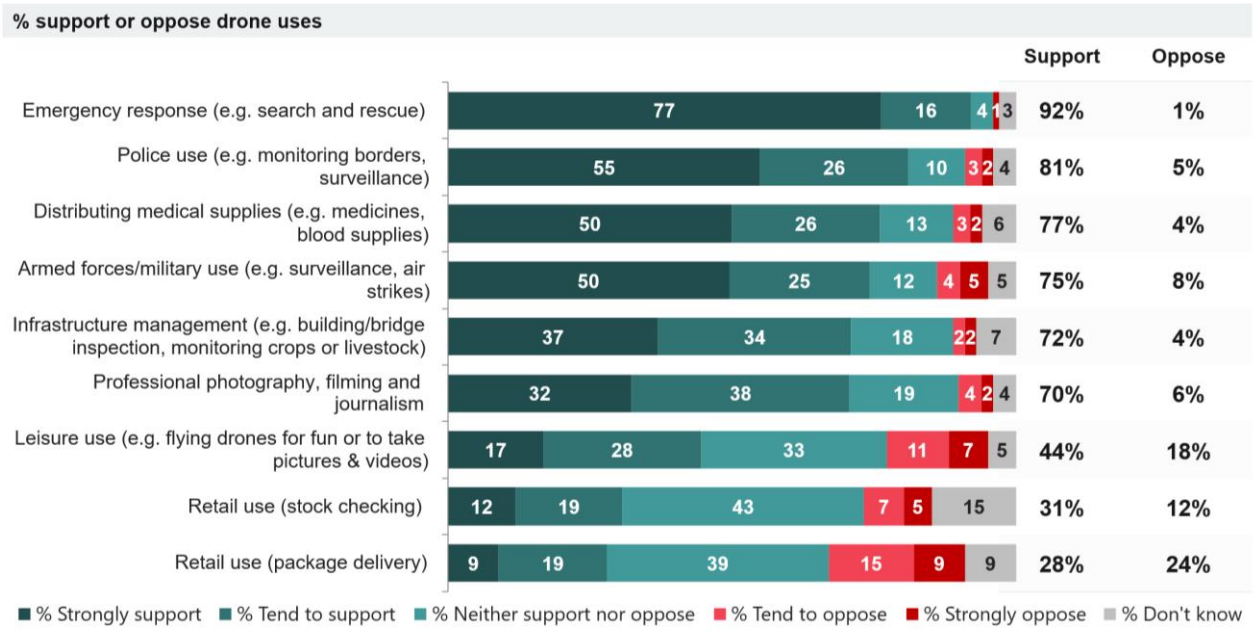
those earning up to £25,999 (81%). They were also more likely to have heard of drones being used for 'professional photography' (84%, 87% and 92%, respectively) compared to those earning up to £25,999 (77%) and 'retail use (package delivery)' (42%, 51% and 60%, respectively) compared to those earning up to £25,999 (35%).

5.4 Support for or opposition to drone uses

Most people in the UK supported the use of drones for 'emergency response (e.g. search and rescue)' (92%), 'police use (e.g. monitoring borders, surveillance)' (81%), 'distributing medical supplies (e.g. medicines, blood supplies)' (77%), 'armed forces/military use (e.g. surveillance, air strikes)' (75%), 'infrastructure management (e.g. building/bridge inspection, monitoring crops or livestock)' (72%) and 'professional photography, filming and journalism' (70%).

However, less than half of people supported the use of drones for 'leisure use (e.g. flying drones for fun or to take pictures and videos)' (44%), 'retail use (stock checking)' (31%) and 'retail use (package delivery)' (28%).

Figure 5.3: Support or oppose drone uses



Q133 [Postal survey Q19]. To what extent do you support or oppose drones being used in the following situations?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 3990 - 4041)

- For several drone uses, men were more likely than women to support them. For example, 'emergency response' (94% compared to 91%), 'distributing medical supplies' (81% compared to 73%), 'armed forces/military use' (78% compared to 73%) and 'infrastructure management' (78% compared to 66%).

- People aged 50-69 and 70+ were more likely to support a range of drone uses compared to younger age groups. For example, they were more likely to support 'emergency response' (95% for both) compared to those aged 16-29 (89%) and 30-49 (90%). Similarly, they were more likely to support 'police use' (88% and 90%, respectively) compared to those aged 16-29 (69%) and 30-49 (77%), 'armed forces/military use' (82% and 84%, respectively) compared to those aged 16-29 (62%) and 30-49 (71%), and 'infrastructure management' (76% and 78%, respectively) compared to those aged 16-29 (62%).

- Rural residents were more supportive than urban residents across several drone uses, including ‘emergency response’ (95% compared to 92%), ‘police use’ (85% compared to 80%), ‘armed forces/military use’ (80% compared to 73%) and ‘infrastructure management’ (77% compared to 70%).

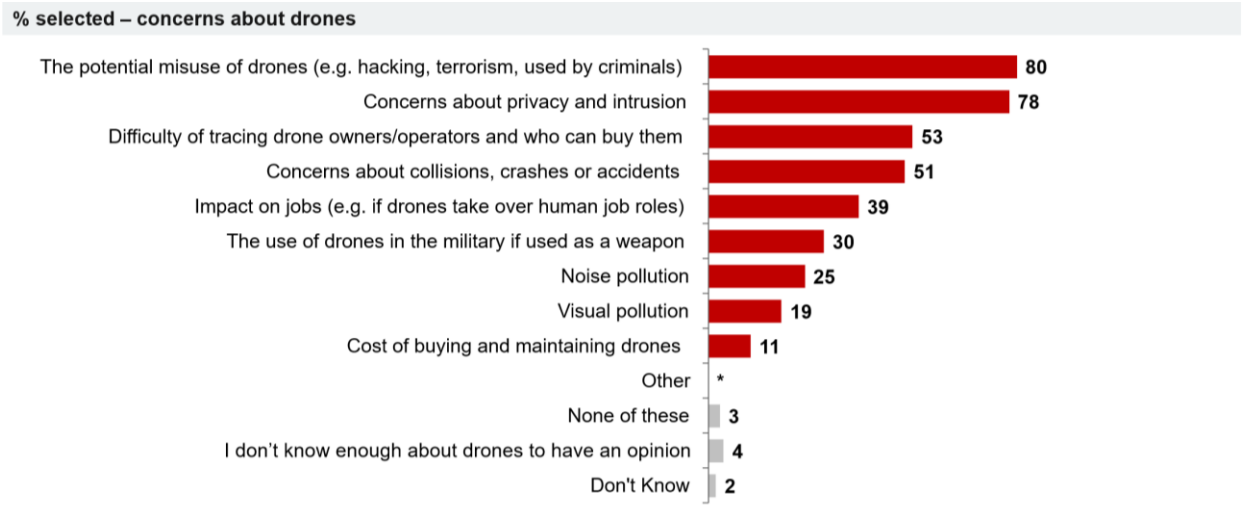
- Support was higher among people from higher income households than those in lower income households for several drone uses. For example, those living in households earning £26,000 and above per annum were more likely to support use of drones for ‘emergency response’ (95%) compared to those earning up to £25,999 per annum (91%). Further, those earning £52,000-£99,999 and £100,000 and above per annum were more likely to support use of drones for ‘distributing medical supplies’ (84% and 83%, respectively) and ‘professional photography, filming and journalism’ (79% and 80%, respectively) compared to those earning up to £25,999 per annum (74% and 67%, respectively).

5.5 Concerns about drones – prompted

The top concerns about the use of drones were 'the potential misuse of drones (e.g. hacking, terrorism, used by criminals)' (80%) and 'concerns about privacy and intrusion' (78%), as shown in **Figure 5.4.** These were followed by 53% stating they are concerned about the 'difficulty of tracing drone owners/operators and who can buy them', 'concerns about collision, crashes or accidents' (51%), 'impact on jobs (e.g. if drones take over human job roles)' (39%), 'the use of drones in military if used as a weapon' (30%), 'noise pollution' (25%), 'visual pollution' (19%) and cost of buying and maintaining drones (11%).

Only 3% said that they don't think that any of these were concerns.

Figure 5.4: Concerns about drones



Q135 [Postal survey Q20]. Which of the following concerns, if any, do you have about the use of drones?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4054)

- Women were more likely than men to be concerned about 'privacy and intrusion' (81% compared to 76%), 'impact on jobs' (45% compared to 33%) and 'the use of drones in the military if used as a weapon' (35% compared to 24%). Men were more likely than women to be concerned about 'collisions, crashes or accidents' (53% compared to 48%).

- For several drone concerns, people aged 50-59 and 70+ were more likely than younger age groups to select them. For example, they were more likely to be concerned about 'difficulty of tracing down owners/operators and who can buy them' (63% and 65%, respectively) compared to those aged 16-29 (38%) and 30-49 (48%).

- Rural residents were more likely to be concerned about 'privacy and intrusion' (82%) compared to urban residents (78%). Conversely, urban residents were more likely to be concerned about 'the use of drones in the military if used as a weapon' (31%) compared to rural residents (25%).

- People from lower income households were more likely to be concerned about the 'impact drones will have on jobs' compared to those in the highest income households. Those living in households earning up to £25,999, between £26,000-£51,999 and between £52,000-£99,999 per annum were more likely to be concerned about this (43%, 39% and 42%, respectively) compared to those earning £100,000 and above per annum (27%).

6 Sustainable aviation fuels

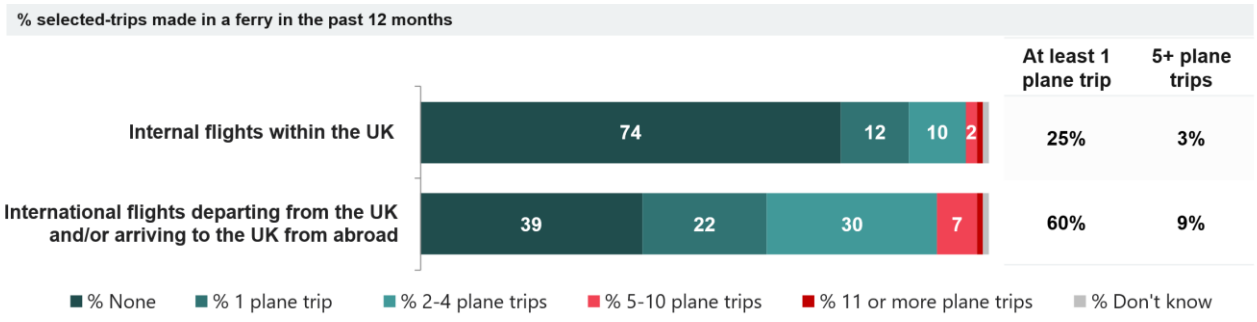
6.1 Summary

- In the last 12 months, six in ten people said they have taken an international flight departing from and/or arriving in the UK from abroad. A quarter of people said they have taken an internal flight within the UK (see section 6.2).
- Just over half of people were aware of sustainable aviation fuels (SAFs), with three in ten who said they know a 'great deal', a 'fair amount' or 'just a little' about them (see section 6.3).
- More people supported than opposed airlines charging higher fares for journeys using SAF. A third said they would support this, just over a quarter would oppose this and almost three in ten said they neither support nor oppose (see section 6.4).
- People's stated likelihood of paying additional charges for a hypothetical short-haul plane journey made using green alternatives decreased as the proposed cost increased. Almost half would likely pay an extra £5 and an extra £10 on a hypothetical £100 flight. This declined to nearly two-fifths willing to pay an extra £20 (see section 6.5).

6.2 Flights taken in the past 12 months

In the last 12 months, a quarter (25%) of people had taken at least one plane trip within the UK, and six in ten (60%) had taken at least one plane trip internationally departing from and/or arriving to the UK from abroad, as shown in **Figure 6.1.**

Figure 6.1: Flights taken in the past 12 months



Q160 [Postal survey Q25]. How many times, if any, have you made a trip in a plane in the last 12 months? Figures <2% have been removed from the chart to improve chart readability.
Base: All 16+ in UK (unweighted valid responses, Spring 25 – trips by plane within the UK: 3965, international trips by plane: 4026)

- Men were more likely than women to have taken at least one international flight in the last 12 months (63% compared to 58%). However, this difference was not found for flights within the UK.
- People aged 70+ were more likely to have not taken any flights within the UK in the last 12 months (80%) than those aged 30-49 (72%) and 50-69 (73%). Similarly, they were more likely to have not taken any flights internationally in the last 12 months (58%) than those aged 16-29 (33%), 30-49 (34%) and 50-69 (37%).
- London residents were more likely to have taken at least one flight within the UK (30%) and internationally (77%) in the last 12 months compared to those living in all other regions of England (21% and 58%, respectively).

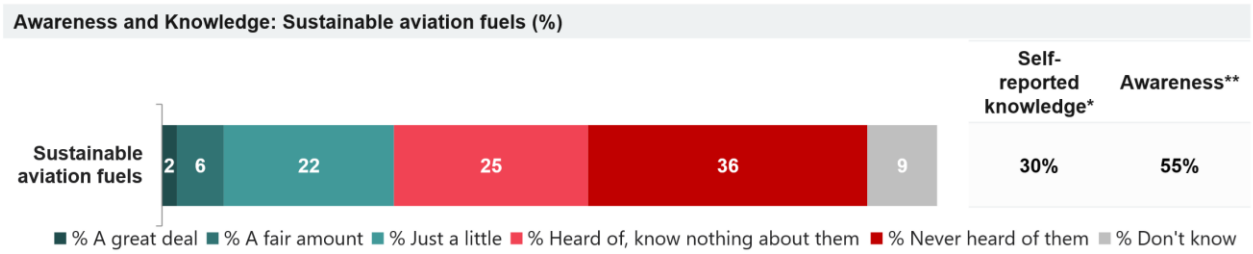
- People living in Scotland were more likely to have taken at least one flight within the UK in the last 12 months (39%) compared to those in England (22%) and Wales (20%). However, this difference was not found for international flights.

- People from the lowest income households earning up to £25,999 per annum were most likely to have not taken any flights within the UK in the last 12 months (81%) compared to those in higher income households (76% in households earning between £26,000-£51,999, 71% in households earning between £52,000-£99,999 and 67% in households earning £100,000 and above). Similarly, they were most likely to have not taken any international flights in the last 12 months (59%) compared to those in higher income households (41%, 28% and 15%, respectively).

6.3 Awareness and knowledge

In Spring 2025, just over half (55%) of people in the UK said they were aware of sustainable aviation fuels, with three in ten (30%) who said they know 'a great deal', 'a fair amount' or 'just a little' about them, as shown in **Figure 6.2.** Almost two-fifths (36%) of people said they have 'never heard of them' and almost one in ten (9%) said they 'don't know' if they have heard of them.

Figure 6.2: Awareness of sustainable aviation fuels



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it

Q310 [Postal survey Q30]. Before today, how much, if anything, would you say you knew about sustainable aviation fuels?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4047)

- Men were more likely than women to have higher self-reported knowledge about sustainable aviation fuels (43% compared to 18%).

- People aged 16-29 were more likely to say they know a 'great deal/fair amount' about sustainable aviation fuels (16%) compared to those aged 30-49 (9%), 50-69 (6%) and 70+ (4%).

- London residents had higher self-reported knowledge about sustainable aviation fuels (36%) compared to those living in other areas of England (30%).

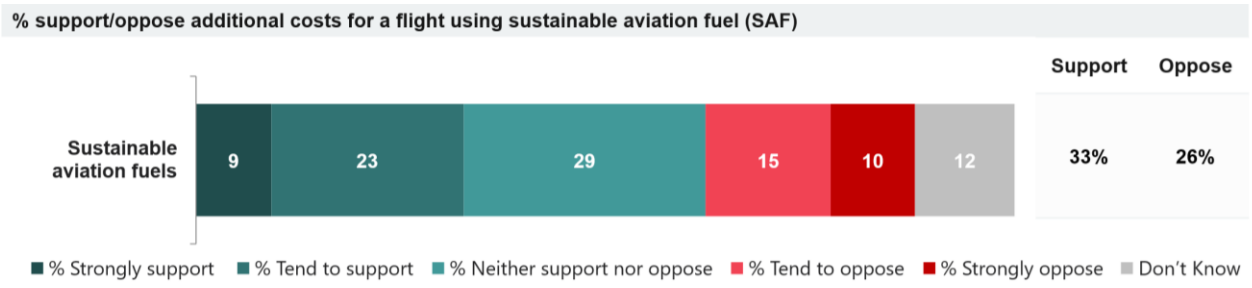
- People from the highest income households earning £100,000 and above per annum had higher self-reported knowledge about sustainable aviation fuels (41%) compared to those in lower income households (28% in households earning up to £25,999 and 31% in households earning between £26,000-£51,999).

- People who had taken a flight (domestic or international) in the last 12 months had higher self-reported knowledge of sustainable aviation fuels (35%) compared to those who had not (23%).

6.4 Support/oppose additional costs for a flight using sustainable aviation fuel

A third (33%) of people said they support airlines charging higher fares for journeys using SAF, as shown in **Figure 6.3**. A slightly lower proportion of people (26%) said they oppose this. Almost three in ten (29%) said they 'neither support nor oppose', whilst 12% said they 'don't know'.

Figure 6.3: Support/oppose additional costs for a flight using sustainable fuel



Q311 [Postal survey Q31]. In principle, to what extent would you support or oppose airlines charging higher fares for journeys using sustainable aviation fuel?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)

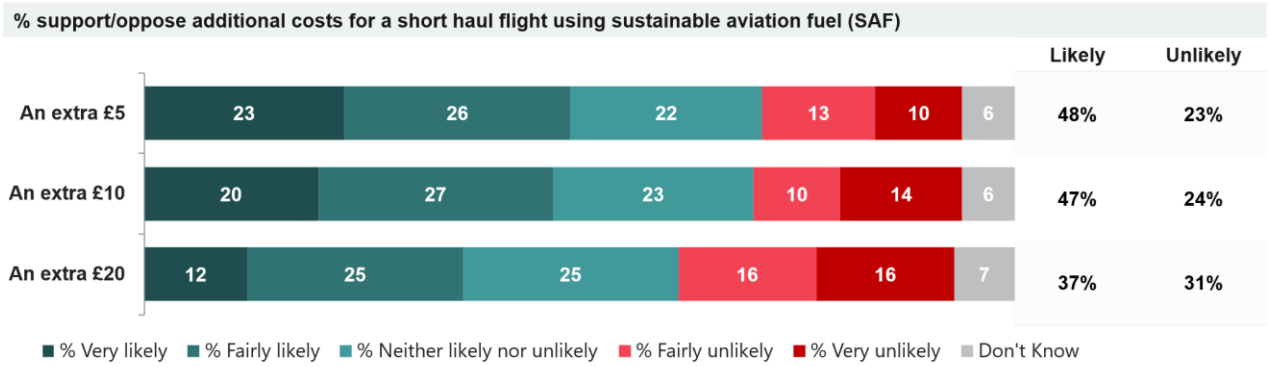
- Men were more likely than women to support airlines charging higher fares for journeys using SAF (37% compared to 28%).
- People aged 21-29 were more likely to oppose airlines charging higher fares for journeys using SAF (36%) compared to those aged 16-20 (22%), 40-49 (27%), 50-59 (24%), 60-69 (24%) and 70+ (18%).
- People living in England were more likely to support airlines charging higher fares for journeys using SAF (33%) compared to those in Wales (25%).
- People living in South England were more likely to support airlines charging higher fares for journeys using SAF (36%) compared to those in the North (29%) and Midlands (28%).
- People from the highest income households earning £100,000 and above per annum were more likely to support airlines charging higher fares for journeys using SAF (46%) compared to those in lower income households (31% in households earning up to £25,999, 35% in households earning between £26,000-£51,999 and 35% in households earning between £52,000-£99,999).
- People who had flown internationally in the last 12 months were more likely to support airlines charging higher fares for journeys using SAF (35%) compared to those who had not flown internationally in the last 12 months (30%).

6.5 Support/oppose additional costs for a short-haul flight using sustainable aviation fuel

In Spring 2025, people were asked about the likelihood of paying an extra charge for a £100 short-haul flight (three hours or less) made using green alternatives, with three cost options presented. People were randomly selected to answer about one of the cost options only: £5, £10 or £20. This was to avoid people being influenced by which order they saw the responses (order effects), or which price they had seen first (anchoring effects).

Almost half (48%) of people said they would likely pay an extra £5 and an extra £10 (47%), as shown in **Figure 6.4**. This then declined with the prospect of paying an extra £20 (37%). However, higher proportions of people were more likely than unlikely to pay extra regardless of the cost increase. This pattern was similar to the willingness to pay an extra fee for a £100 short-haul ferry journey powered by green alternatives (see section 9.5).

Figure 6.4: Support/oppose additional costs for a short-haul flight using sustainable fuel



Q312 [Postal survey Q32]. Imagine you're about to book a short haul flight, that is a flight of three hours or less and the fare was £100. Assuming that the journey time is unchanged, how likely or unlikely do you think you would personally be to pay extra for a flight that was made using greener alternatives if you were charged [£5/£10/£20]?
Base: All 16+ in UK split into three random sample groups (unweighted valid responses, Spring 25– an extra £5: 1307, an extra £10: 1359, an extra £20: 1392)

- People aged 30-49, 50-69 and 70+ were more likely to pay an **extra £10** (52%, 52% and 45%, respectively) compared to those aged 16-29 (33%).
- London residents were more likely to pay an **extra £5** (61%) compared to those living in all other regions of England (47%). For higher costs, people living in urban areas were more likely to pay an **extra £20** (38%) compared to those in rural areas (30%).
- People living in households earning between £52,000-£99,999 per annum were more likely to pay an **extra £5** (58%) compared to those earning up to £25,999 per annum (45%). At higher costs, people from the highest income households earning £100,000 and above per annum were more likely to pay an **extra £10** (61%) compared to those earning up to £25,999 per annum (41%).
- People with self-reported knowledge of different aviation technologies were consistently more willing to pay extra across price levels. Those with knowledge of sustainable aviation fuel were more likely to pay an **extra £5** (58% compared to 42% who had never heard of it) and an **extra £20** (47% compared to 34%). Similarly, those with knowledge of hydrogen-powered planes were more likely to pay an **extra £5** (59% compared to 47%) and an **extra £20** (47% compared to

32%), while those with knowledge of battery-powered planes were more likely to pay an **extra £20** (45% compared to 34%).

- People who had taken flights in the last 12 months were consistently more willing to pay extra for flights using SAF across different price levels. Those who had taken an international flight were more likely to pay an **extra £5** (53%) and an **extra £10** (53%) compared to those who had not taken an international flight (42% and 38%, respectively), and were more willing to pay an **extra £20** (41% compared to 33%). Similarly, people who had taken any flight (either within the UK or internationally) were more likely to pay an **extra £5** (54%) and an **extra £10** (52%) compared to those who had not taken a flight (41% and 38%, respectively).

7 Battery-powered electric planes

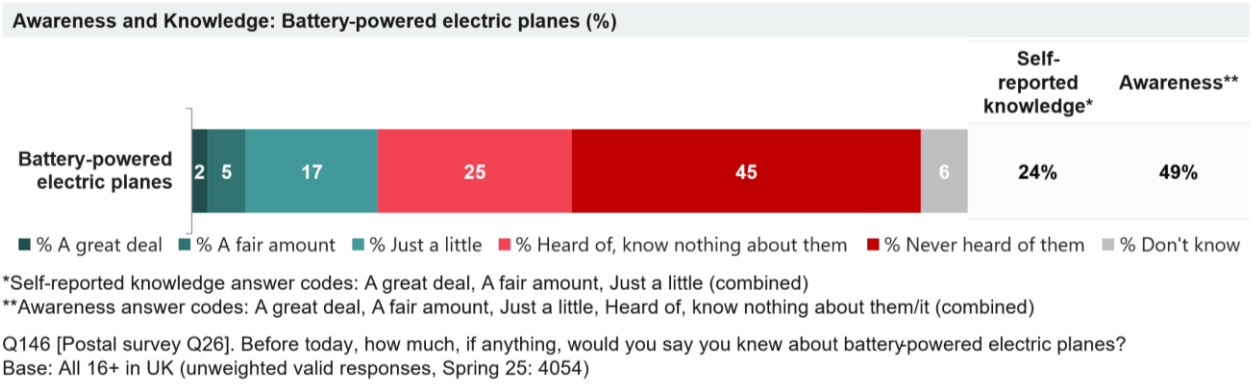
7.1 Summary

- Around half of people were aware of battery-powered electric planes. A quarter had some level of knowledge. Self-reported knowledge was much higher among men compared to women (see section 7.2).
- When shown a list of potential concerns about battery-powered electric planes, 'concerns about the distance you can travel (e.g. battery life)' and 'concerns about new/unproven technologies' were the most frequently selected (see section 7.3).

7.2 Awareness and knowledge

In Spring 2025, almost half (49%) of people in the UK were aware of battery-powered electric planes, as shown in **Figure 7.1.** Around a quarter (24%) of people self-reported knowledge, saying they knew a 'great deal', 'fair amount' or 'just a little' about battery-powered electric planes.

Figure 7.1: Awareness of battery-powered planes



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little (combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it (combined)

Q146 [Postal survey Q26]. Before today, how much, if anything, would you say you knew about battery-powered electric planes?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4054)

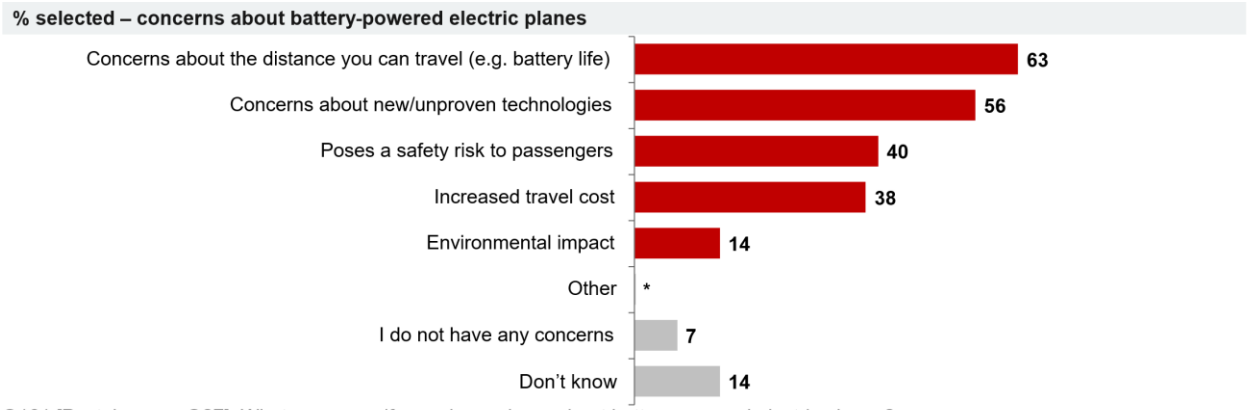
- Men had much higher self-reported knowledge about battery-powered electric planes (37%) compared to women (12%).
- People aged 16-29 had higher self-reported knowledge about battery-powered electric planes (31%) compared to those aged 30-49 (22%), 50-69 (24%) and 70+ (20%).
- People living in South England were more aware of battery-powered electric planes (52%) compared to those in the North (43%).
- People from the highest income households earning £100,000 and above per annum had higher self-reported knowledge about battery-powered electric planes (34%) compared to those in lower income households (21% in households earning up to £25,999 and 24% in households earning between £26,000-£51,999).
- People who had taken a flight in the last 12 months had higher self-reported knowledge about battery-powered electric planes (27%) compared to those who had not (20%).

7.3 Concerns about battery-powered electric planes – prompted

The top two concerns selected about battery-powered electric planes were 'concerns about the distance you can travel (e.g. battery life)' (63%) and 'concerns about new/unproven technologies' (56%), as shown in **Figure 7.2**. These were followed by concerns that they 'pose a safety risk to passengers' (40%), 'increased travel cost' (38%) and 'environmental impact' (14%).

Just under one in ten (7%) of people said they 'do not have any concerns' and 14% said they 'don't know'.

Figure 7.2: Concerns about battery-powered electric planes



Q161 [Postal survey Q27]. What concerns, if any, do you have about battery-powered electric planes?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)

- Women were more likely than men to be concerned that battery-powered electric planes pose a safety risk to passengers (43% compared to 38%).
- People aged 50-69 were more likely to have concerns about the new/unproven technology (62%) compared to those aged 16-29 (54%), 30-49 (52%) and 70+ (57%).
- People living in England outside of London were more concerned than London residents about the distance you can travel in battery-powered electric planes (66% compared to 57%), new/unproven technology (59% compared to 46%) and that they pose a safety risk to passengers (42% compared to 33%).
- People from higher income households were more likely to be concerned about the distance you can travel in battery-powered electric planes compared to those in lower income households. Those earning between £52,000-£99,999 and £100,000 and above per annum were more concerned (72% and 70%, respectively) compared to those in households earning up to £25,999 (60%) and between £26,000-£51,999 (66%).
- People who had taken a flight (domestic or international) in the last 12 months were more likely than those who had not taken a flight to be concerned about the distance you can travel in battery-powered electric planes (67% compared to 59%) and increased travel cost (42% compared to 34%).
- People who had never heard of battery-powered planes were more likely than those who knew a 'great deal/fair amount' to be concerned about the new/unproven technology (60% compared to 42%) and that they pose a safety risk to passengers (45% compared to 33%).

8 Hydrogen-powered planes

8.1 Summary

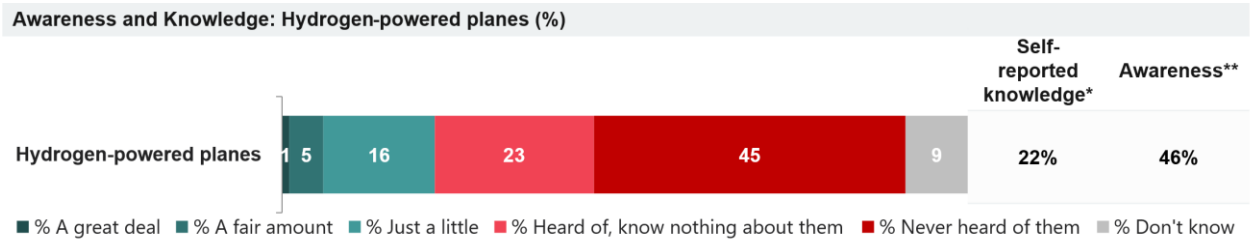
- Levels of awareness and self-reported knowledge of hydrogen-powered planes were similar to those of battery-powered planes. Around half of people were aware of battery-powered planes. Just over a fifth had some level of knowledge. Self-reported knowledge was much higher among men compared to women (see section 8.2).
- When shown a list of potential concerns about hydrogen-powered planes, 'risk of fire/combustion/explosions' and 'concerns about new/unproven technologies' were the most frequently selected (see section 8.3).

8.2 Awareness and knowledge

In Spring 2025, awareness of hydrogen-powered planes was similar to awareness of battery-powered planes, with almost half (46%) of people in the UK saying they were aware, as shown in **Figure 8.1**. Just over a fifth (22%) said they know a 'great deal', 'fair amount' or 'just a little' about them.

Just under a half (45%) of people said they have 'never heard of them' and almost one in ten (9%) of people said they 'don't know'.

Figure 8.1: Awareness of hydrogen-powered planes



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little (combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it (combined)

Q148 [Postal survey Q28]. Before today, how much, if anything, would you say you knew about hydrogen-powered planes?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4050)

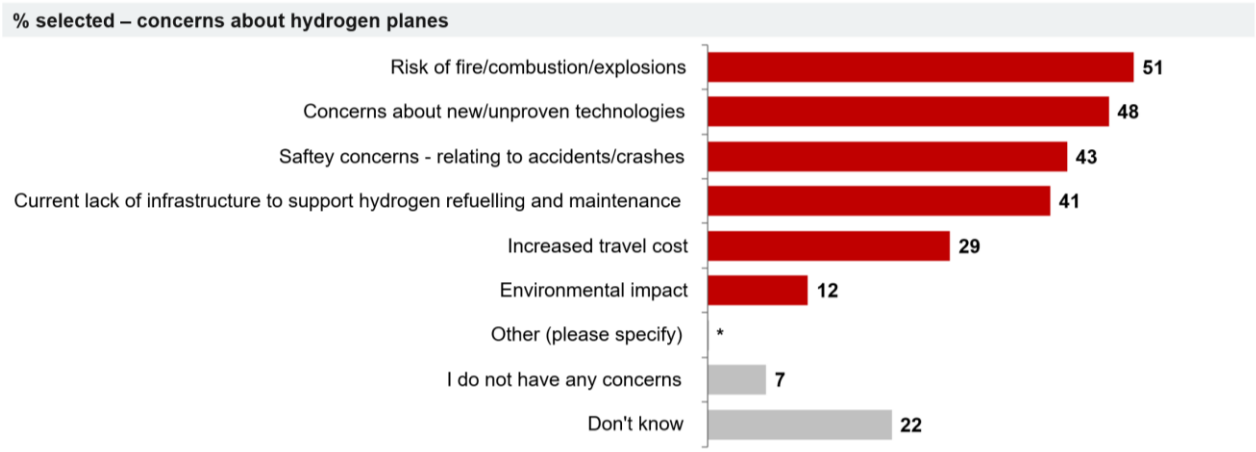
- Men were much more likely than women to have self-reported knowledge about hydrogen-powered planes (33% compared to 12%).
- People aged 16-29 were more likely to say they know a 'great deal/fair amount' about hydrogen-powered planes (12%) compared to those aged 30-49 (7%), 50-69 (4%) and 70+ (3%).
- London residents had higher self-reported knowledge about hydrogen-powered planes (28%) compared to those living in all other regions of England (22%).
- People who had taken a flight in the last 12 months had higher self-reported knowledge about hydrogen-powered planes (24%) compared to those who had not taken a flight in the last 12 months (20%).
- People from the highest income households earning £100,000 and above per annum had higher self-reported knowledge about hydrogen-powered planes (32%) compared to those in lower income households (20% in households earning up to £25,999, 22% in households earning between £26,000-£51,999 and 24% in households earning between £52,000-£99,999).

8.3 Concerns about hydrogen-powered planes – prompted

The top two concerns selected about hydrogen-powered planes were 'risk of fire/combustion/explosions' (51%) and 'concerns about new/unproven technologies' (48%), as shown in **Figure 8.2**. These were followed by 'safety concerns – relating to accidents/crashes' (43%), 'current lack of infrastructure to support hydrogen refuelling and maintenance' (41%), 'increased travel cost' (29%) and 'environmental impact' (12%).

Just under one in ten (7%) of people said they 'do not have any concerns' and 22% said they 'don't know'.

Figure 8.2: Concerns about hydrogen-powered planes



Q162 [Postal survey Q29]. What concerns, if any, do you have about hydrogen-powered planes?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4048)

- Women were more likely than men to have safety concerns relating to 'accidents/crashes' (45% compared to 40%). However, men were more likely than women to be concerned about 'the current lack of infrastructure' (44% compared to 38%).

- People aged 50-69 and 70+ were more likely to be concerned about 'the new/unproven technology' (53% and 51%, respectively) compared to those aged 16-29 (41%) and 30-49 (45%).

- For four concerns about hydrogen-powered planes, people who had taken a flight in the last 12 months were more likely than those who had not taken a flight to select them. They were more likely to be concerned about the 'risk of fire/combustion/explosions' (53% compared to 48%), 'the new/unproven technologies' (51% compared to 44%), 'safety concerns relating to accidents/crashes' (45% compared to 40%) and 'increased travel cost' (32% compared to 24%).

9 Ferries

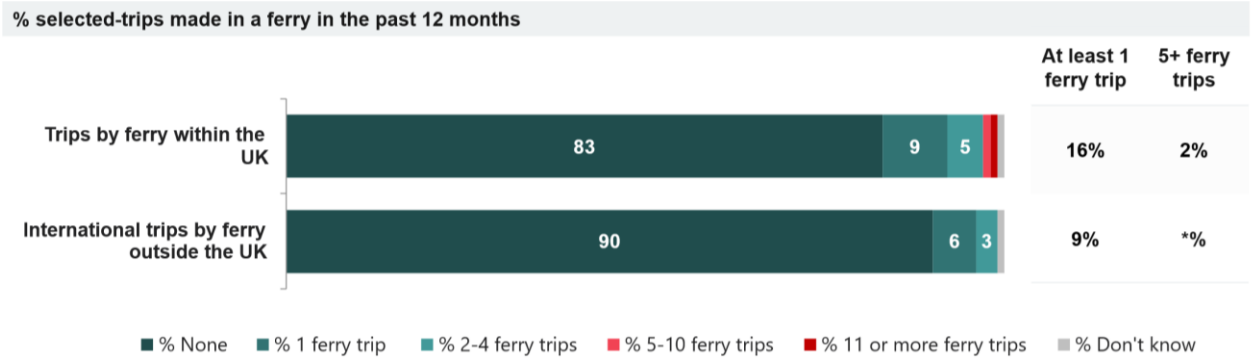
9.1 Summary

- In the last 12 months, the majority of people had not taken a ferry trip either within the UK or outside of the UK (see section 9.2).
- Nearly half of people said they were aware of electric powered ferries and just under two in five were aware of ferries powered by ammonia. Around a fifth said they know ‘a great deal’, ‘a fair amount’ or ‘just a little’ about each of these types of ferry (see section 9.3).
- Just over six in ten people said they would be willing to travel on a ferry powered by low carbon fuels. A quarter were neutral about this, whilst the rest were unwilling or not sure (see section 9.4).
- People’s stated likelihood of paying additional charges for short-haul ferry journeys powered by green alternatives decreased as the proposed cost increased (see section 9.5).

9.2 Ferry trips in the past 12 months

In the last 12 months, the majority of people had not taken a ferry trip within the UK (83%) or outside of the UK (90%), as shown in **Figure 9.1**. Around one in six (16%) of people said they had taken at least one ferry trip within the UK, while less than one in ten said they had taken at least one international trip by ferry outside of the UK (9%).

Figure 9.1: Ferry trips in the last 12 months



Q500 [Postal survey Q21]. How many times, if any, have you made a trip in a ferry in the last 12 months? Figures <2% have been removed from the chart to improve chart readability.
Base: All 16+ in UK (unweighted valid responses, Spring 25 – trips by ferry within the UK: 4039, international trips by ferry: 3948)

- Men were more likely than women to have taken at least one ferry trip within the UK (17% compared to 14%) and outside of the UK (10% compared to 7%) in the last 12 months.
- People living in Scotland were more likely to have taken at least one ferry trip within the UK in the last 12 months (26%) compared to those in Wales (8%) and England (15%). Conversely, those living in England were more likely to have taken at least one ferry trip outside of the UK in the last 12 months (10%) compared to those in Scotland (4%).
- People living in South England were more likely to have taken at least one ferry trip within the UK in the last 12 months (18%) compared to those in the North (11%) and Midlands (13%). People living in South England were also more likely to have taken at least one ferry trip outside the UK in the last 12 months (11%) compared to those in the Midlands (7%).

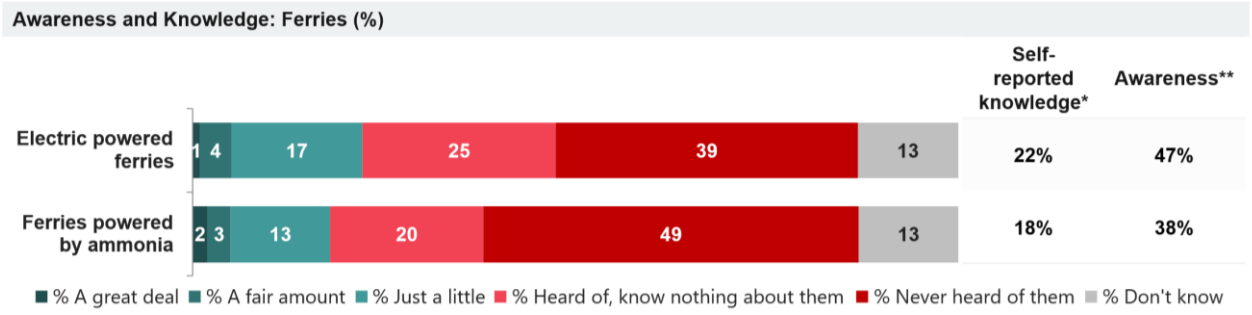
- People from the highest income households earning £100,000 and above per annum were more likely to have taken at least one ferry trip within the UK (21%) and outside of the UK (12%) in the last 12 months compared to those living in households earning up to £25,999 per annum (14% and 7%, respectively).

9.3 Awareness and knowledge

In Spring 2025, almost half of people in the UK were aware of electric powered ferries (47%), as shown in **Figure 9.2**. Just under two in five were aware of ferries powered by ammonia (38%). Around one in five self-reported knowledge, saying they know 'a great deal', 'a fair amount' or 'just a little' about electric powered ferries (22%) and ferries powered by ammonia (18%).

Almost two in five (39%) of people said they had never heard of electric powered ferries and almost half (49%) of people said they had never heard of ferries powered by ammonia.

Figure 9.2: Awareness and knowledge of electric powered ferries and ferries powered by ammonia



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little (combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it (combined)

Q501 [Postal survey Q22]. Before today, how much, if anything, would you say you knew about the use of these low carbon fuelsfor ferries?
Base: All 16+ in UK (unweighted valid responses, Spring 25 - ferries powered by ammonia: 4046, electric powered ferries: 4024)

- Men had higher self-reported knowledge than women for 'electric powered ferries' (31% compared to 14%) and 'ferries powered by ammonia' (23% compared to 12%).

- People aged 50-69 and 70+ were more likely to be aware of 'ferries powered by ammonia' (41% for both age groups) compared to those aged 16-29 (32%) and 30-49 (35%). However, this difference was not evident for self-reported knowledge or awareness of electric powered ferries.

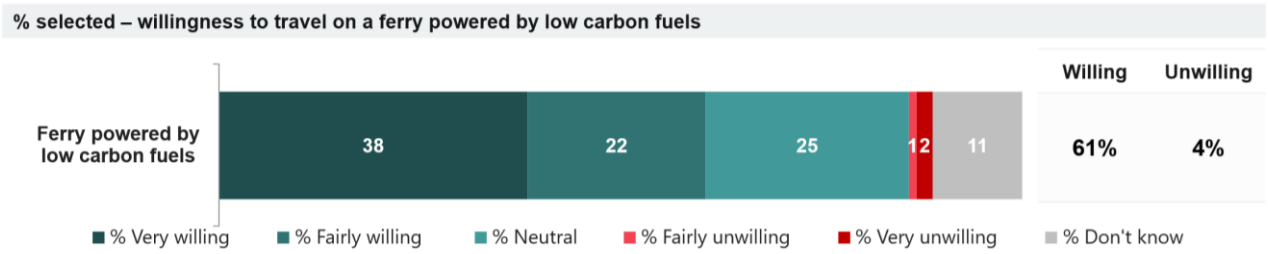
- People living in Scotland had higher self-reported knowledge of 'electric powered ferries' (31%) compared to those in England (21%) and Wales (17%). Scotland residents also had higher self-reported knowledge of 'ferries powered by ammonia' (23%) compared to those in England (17%).

- People who had taken a ferry trip within the UK and outside the UK in the last 12 months had higher self-reported knowledge of both ferry types compared to those who had not taken these trips. For 'ferries powered by ammonia', those who had taken ferry trips within the UK and outside the UK had higher knowledge (29% and 36%, respectively) compared to those who had not (16% for both). Similarly, for 'electric powered ferries', those who had taken ferry trips within the UK and outside the UK had higher knowledge (35% and 41%, respectively) compared to those who had not (20% for both).

9.4 Willingness to travel on a ferry powered by low carbon fuels

In Spring 2025, just over six in ten (61%) of people said they would be willing to travel on a ferry powered by low carbon fuels, with 38% who were 'very willing', as shown in **Figure 9.3.** Only 4% said they would be unwilling.

Figure 9.3: Willingness to travel on a ferry powered by low carbon fuels



Q502 [Postal survey Q23]. Would you be willing to travel on a ferry powered by low-carbon fuels?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)

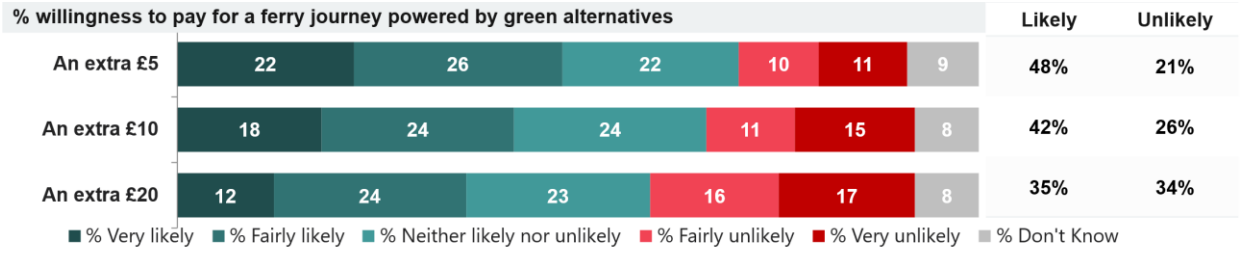
- Men were more willing than women to travel on a ferry powered by low carbon fuel (68% compared to 55%).
- People living in South England were more willing to travel on a ferry powered by low carbon fuel (65%) compared to those in the North (55%) and Midlands (57%).
- People from higher income households were more willing to travel on a ferry powered by low carbon fuel compared to those in the lowest income households. Those living in households earning £100,000 and above per annum, between £52,000-£99,999 and between £26,000-£51,999 were more willing (74%, 71% and 67%, respectively) compared to those earning up to £25,999 per annum (59%).
- People from the least deprived areas were more willing to travel on a ferry powered by low carbon fuel (68%) compared to those in more deprived areas, particularly those living in the most deprived areas (53%).
- People who had taken at least one ferry trip within the UK or internationally in the last 12 months were more willing to travel on a ferry powered by low carbon fuels (73% and 75%, respectively) compared to those who had not taken a ferry trip within the UK (59%) or internationally (60%) in the last 12 months.
- People aware of ferries powered by ammonia and electric powered ferries were more willing to travel on a ferry powered by low carbon fuel (68% and 71%, respectively) compared to those who had never heard of them (62% and 57%, respectively).

9.5 Willingness to pay for a short-haul ferry journey powered by green alternatives

In Spring 2025, people were asked about the likelihood of paying an extra charge for a £100 short-haul ferry journey (under three hours) powered by green alternatives, with three cost options presented. People were randomly selected to answer about one of the cost options only: £5, £10 or £20. This was to avoid people being influenced by which order they saw the responses (order effects), or which price they had seen first (anchoring effects).

Almost half (48%) of people said they would likely pay an extra £5. This fell slightly with the prospect of an extra £10 (to 42%) and an extra £20 (35%), as shown in **Figure 9.4**. However, higher proportions of people were more likely than unlikely to pay extra regardless of the cost increase, although there was only a difference of one percentage point when considering the extra £20.

Figure 9.4: Willingness to pay for a short-haul ferry journey powered by green alternatives



Q503 [Postal survey Q24]. Imagine you're about to book a short ferry journey, of under 3 hours, with a fare of £100 for yourself and a vehicle. Assuming that the journey time is unchanged, how likely or unlikely are you to personally pay extra for a ferry journey that was powered by green alternatives, if you were charged [£5/£10/£20]?
Base: All 16+ in UK split into three random sample groups (unweighted valid responses, Spring 25– an extra £5: 1307, an extra £10: 1359, an extra £20: 1392)

- Age patterns for willingness to pay showed different responses depending on the cost level. For lower costs, people aged 30-49 and 50-69 were more likely to pay an **extra £5** (56% and 52%, respectively) compared to those aged 16-29 (36%) and 70+ (40%). However, for higher costs, younger age groups were more reluctant, with people aged 16-29 (34%), 30-49 (25%) and 50-69 (26%) being more **unlikely** to pay an **extra £10** compared to those aged 70+ (18%).

- People living in South England were more likely to pay an **extra £5** (54%) compared to those in the North (44%) and Midlands (41%).

- People from the highest income households earning £100,000 and above per annum were more likely to pay an **extra £10** (51%) compared to those in households earning up to £25,999 per annum (37%).

- People who had taken a ferry trip in the last 12 months were more willing to pay extra for green ferry journeys across different price levels. For example, people who had taken an international ferry trip were more likely to pay an **extra £5** (64%) compared to those who had not taken an international ferry trip (47%). Additionally, almost half (46%) of people who had taken an international or UK ferry trip in the last 12 months were more likely to pay an **extra £20**, compared to those who had not taken a ferry trip (33%).

- People with self-reported knowledge of electric powered ferries were more willing to pay extra for green ferry journeys across different price levels compared to those who had never hear of them. This pattern held for an **extra £5** (61% compared to 46%), an **extra £10** (49% compared to 38%), and an **extra £20** (45% compared to 29%).

10 Artificial intelligence

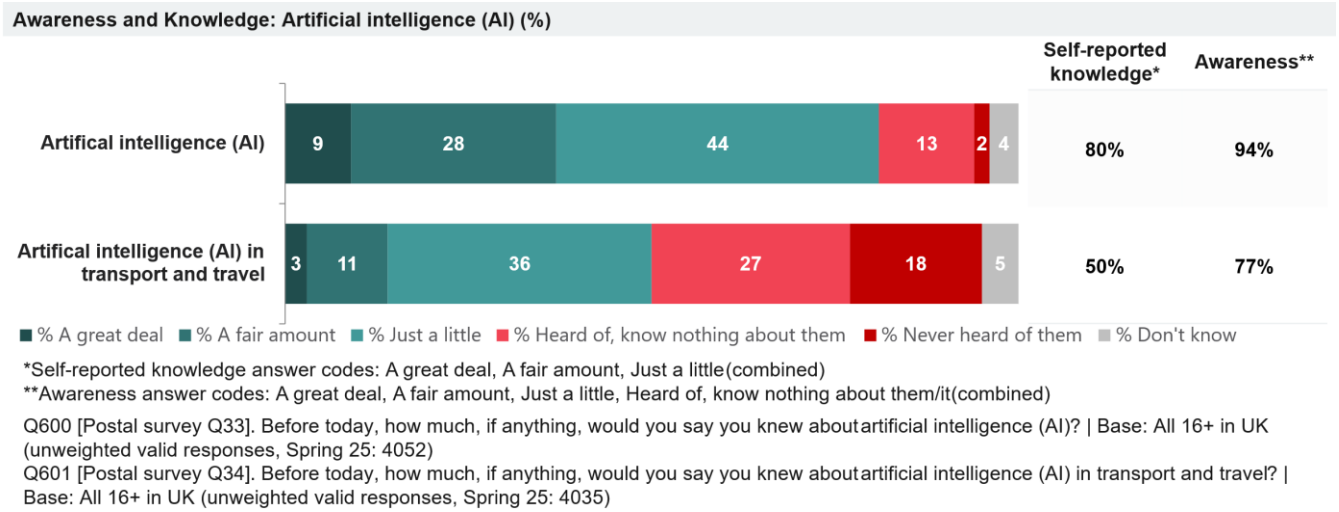
10.1 Summary

- Awareness and knowledge of AI in general was much higher than it was for AI in transport and travel. Around a fifth of people had never heard of AI in transport and travel (see section 10.2).
- Around half of people could not identify (selected 'don't know') any advantages or disadvantages of using AI in transport and travel (see sections 10.3 and 10.4).
- The most frequently mentioned advantages of AI being used in transport and travel were 'improvements to data processing/decisions/AI efficiency', 'improvements to traffic management' and 'improvements to public transport' (see section 10.3).
- The most frequently mentioned disadvantages of AI being used in transport and travel were 'concerns about accuracy and errors' and 'concerns about human impact' (see section 10.4).
- On average, people mentioned one advantage and one disadvantage of AI in transport and travel (see sections 10.3 and 10.4).
- When asked about a range of scenarios for the use of AI in transport, people were generally supportive. They were most supportive of AI being used 'to improve passenger safety when travelling by spotting dangerous items in luggage'. They were least supportive of AI being used 'to make drivers and vehicles safer' (see section 10.5).

10.2 Awareness and knowledge

In Spring 2025, awareness and knowledge of AI in general (94% and 80%, respectively) was higher than it was for AI in transport and travel (77% and 50%, respectively), as shown in **Figure 10.1**. While self-reported knowledge of AI in general was also high, with four-fifths (80%) of people having claimed to know 'a great deal', 'a fair amount' or 'just a little', only half of people (50%) self-reported having knowledge of AI in transport and travel. Almost a further fifth (18%) claimed they had never heard of AI in transport and travel, compared to a small minority (2%) who reported never having heard of AI in general.

Figure 10.1: Awareness of artificial intelligence



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little(combined)
**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them/it(combined)

Q600 [Postal survey Q33]. Before today, how much, if anything, would you say you knew about artificial intelligence (AI)? | Base: All 16+ in UK (unweighted valid responses, Spring 25: 4052)
Q601 [Postal survey Q34]. Before today, how much, if anything, would you say you knew about artificial intelligence (AI) in transport and travel? | Base: All 16+ in UK (unweighted valid responses, Spring 25: 4035)

- Men were more likely than women to self-report knowledge about AI in general (84%) and AI in transport and travel (61%) compared to women (77% and 40% respectively).

- The proportion of people claiming to know a ‘great deal’ or a ‘fair amount’ about AI in general and AI in transport and travel decreased with age. For example, people aged 16-29 were more likely to say they know a ‘great deal’ or a ‘fair amount’ about AI in general (62%) and AI being used in transport and travel (26%) compared to people aged 30-49 (42% and 18%, respectively), 50-69 (27% and 8%, respectively) and 70+ (14% and 4%, respectively).

- People living in the highest income households earning £100,000 and above per annum were more likely to say they know a ‘great deal’ or a ‘fair amount’ about AI in general (55%) and AI being used in transport and travel (22%) compared to people living in lower income households earning up to £25,999 per annum (28% and 12%, respectively) and £26,000-£51,999 per annum (35% and 13%, respectively).

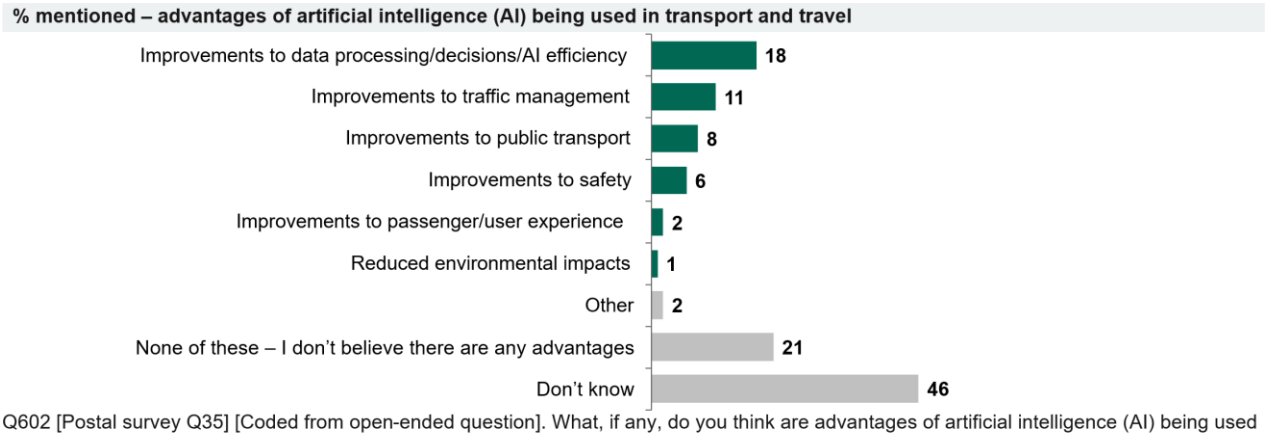
- Smartphone users were more likely to have higher self-reported knowledge about AI in general (82%) and AI in transport and travel (51%) compared to non-smartphone users (50% and 30%, respectively).

10.3 Advantages – unprompted

Almost half (46%) of people in the UK could not cite (selected ‘don’t know’) any advantages of AI being used in transport and travel, as shown in **Figure 10.2**. Around a further fifth (21%) claimed that there were no advantages. The most frequently mentioned advantage was ‘improvements to data processing/decisions/AI efficiency’ (18%), which included people mentioning advantages such as AI being more efficient, its accuracy and lack of human error, and data processing speed. The next most frequently cited advantage was ‘improvements to traffic management’ (11%), which included people mentioning advantages such as route suggestions, journey planning, traffic flow management, real-time updates and fewer delays. The third most frequently mentioned advantage was ‘improvements to public transport’ (8%), which included people mentioning advantages such as AI helping make public transport cheaper and improved scheduling and timetables.

On average, people mentioned one advantage (mentioned 0.6) of AI in transport and travel.

Figure 10.2: Unprompted advantages of artificial intelligence being used in transport and travel



Q602 [Postal survey Q35] [Coded from open-ended question]. What, if any, do you think are advantages of artificial intelligence (AI) being used in transport and travel?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4058)

- For several perceived advantages of AI being used in transport and travel, men were more likely than women to mention these. For example, men were more likely to mention that AI being used in transport and travel will bring ‘improvements to data processing/decisions/AI efficiency’ (21% compared to 14%) and ‘improvements to traffic management’ (15% compared to 9%). Women were not more likely to mention any advantages compared to men.

- The proportion of people who mentioned ‘improvements to data processing/decisions/AI efficiency’ as an advantage of AI in transport and travel decreased with age. For example, people aged 16-29 were more likely to select this (27%) compared to people aged 30-49 (17%), 50-69 (16%) and 70+ (11%).

- People living in South England were more likely to mention ‘improvements to data processing/decisions/AI efficiency’ (21%) and ‘improvements to traffic management’ (15%) compared to people living in the North (14% and 8%, respectively) and Midlands (14% and 9%, respectively).

- People from the highest income households earning £100,000 and above per annum were more likely to mention a range of advantages compared to people from the lowest income households earning up to £25,999 per annum. For example, these people were more likely to mention ‘improvements to data processing/decisions/AI efficiencies’ (27%) and ‘improvements to traffic management’ (25%) compared to people in the lowest income households (12% and 9%, respectively).

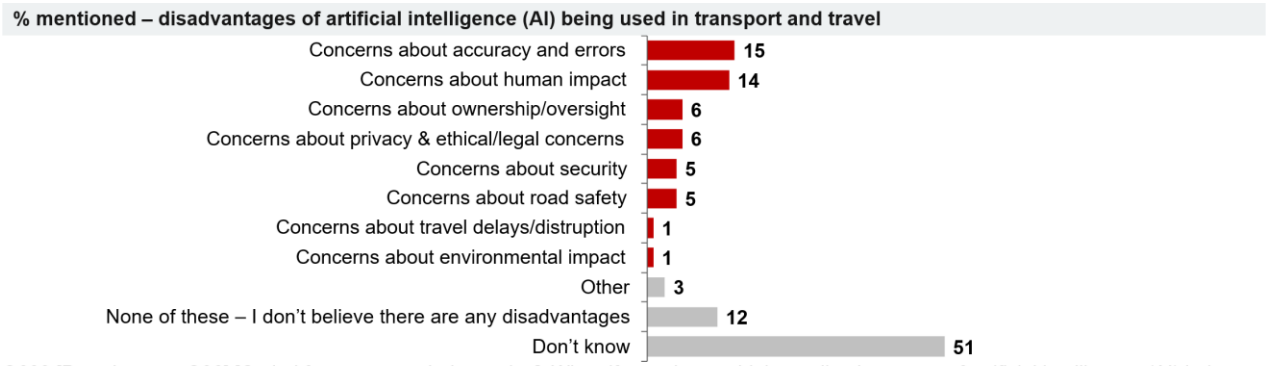
- People who self-reported knowing a ‘great deal’ or ‘fair amount’ about AI being used in transport and travel mentioned more advantages on average (mentioned 1.2) compared to people who said they know ‘just a little’ or have ‘heard of, but know nothing about’ AI being used in transport and travel (mentioned 0.6) and people who had ‘never heard of it’ (mentioned 0.2).

10.4 Disadvantages – unprompted

Around half (51%) of people could not mention (selected 'don't know') any disadvantages of AI being used in transport and travel, similar to when asked about the advantages, as shown in **Figure 10.3**. The disadvantage most frequently mentioned was 'concerns about accuracy and errors' (15%), which included people mentioning disadvantages such as AI being error-prone and inaccurate, unproven and new technology and people becoming too reliant on AI. The next most frequently mentioned disadvantage was 'concerns about human impact' (14%), which included concerns around job loss, price increases and impersonal interactions. The third most frequently mentioned disadvantage was 'concerns about ownership/oversight' (6%), which included mentions of the lack of human oversight, control and decision making and the lack of customer service or support that will be available. Just over one in ten (12%) claimed that there were no disadvantages of AI in transport and travel.

On average, people mentioned one disadvantage (mentioned 0.6) of AI in transport and travel, the same amount as when they highlighted advantages (mentioned 0.6).

Figure 10.3: Unprompted disadvantages of artificial intelligence being used in transport and travel



Q603 [Postal survey Q36] [Coded from open-ended question]. What, if any, do you think are disadvantages of artificial intelligence (AI) being used in transport and travel?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4058)

- For several perceived disadvantages of AI being used in transport and travel, men were more likely than women to mention these. For example, they were more likely to mention 'concerns about accuracy/errors' (17% compared to 13%) and 'concerns about ownership/oversight' (9% compared to 4%). However, women were more likely than men to mention 'concerns about human impact' (16% compared to 12%).

- Younger people aged 16-29 were more likely to mention 'concerns about human impact' (20%) and 'concerns about road safety' (10%) compared to older people aged 50+ (11% and 3%, respectively).

- Those living in Scotland were more likely to mention 'concerns about ownership/oversight' (12%) compared to people living in England (6%) and Wales (4%).

- Those living in London were more likely to mention 'concerns about human impact' (21%) compared to people living in all other regions of England (13%).

- People from the highest income households earning £100,000 and over per annum were more likely to mention 'concerns about accuracy/errors' (23%) compared to lower income households earning up to £25,999 (12%), £26,000-£51,999 (16%) and £52,000-£99,999 (17%). These people were also more likely to mention 'concerns about security' (10%) compared to people from households earning up to £25,999 (6%), £26,000-£51,999 (4%) and £52,000-£99,999 (6%).

10.5 Support/oppose the use of artificial intelligence

Respondents were asked to indicate whether they supported or opposed five specific scenarios where AI could be used in transport. At the point of answering each scenario, they were shown the full scenario description. The wording of these scenarios was developed through focus groups and refined in cognitive testing to ensure they provided sufficient information for respondents to understand each scenario and answer the question confidently. The full scenarios, which have been shortened in Figure 10.4 to improve chart readability, were:

A. To check transport structures (e.g. bridges, rail tracks, roads) for wear and tear and to make sure they are safe. AI can analyse images and data from sensors and cameras far quicker than a human and can increase how often inspections take place. A human oversees the outputs to check for errors.

B. To improve people's journey experience when travelling by using real-time data. For example, AI can use real-time traffic data on roads to change traffic light timings to help traffic move better and reduce congestion.

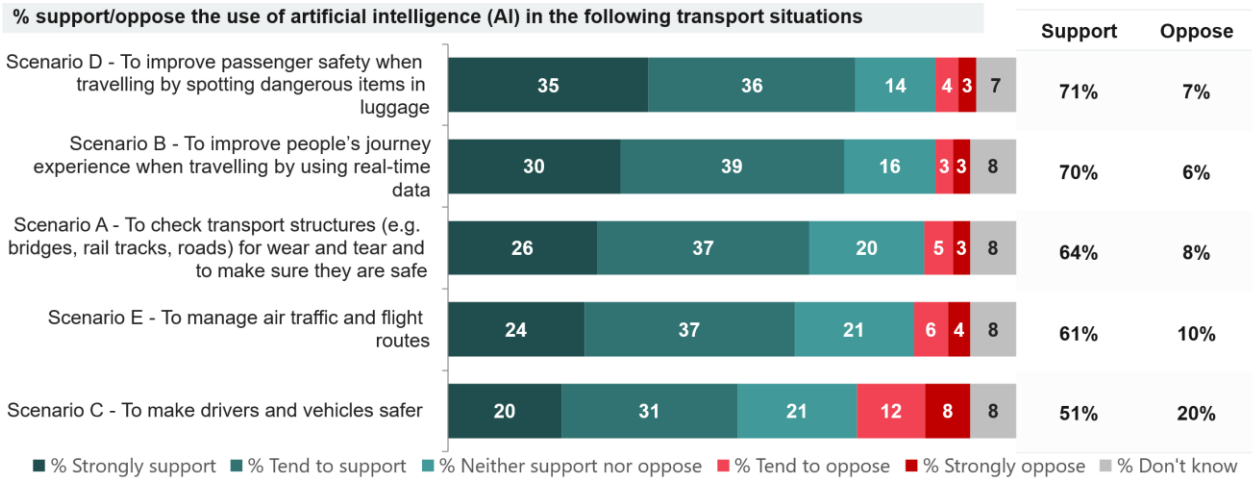
C. To make drivers and vehicles safer. This can be done by using cameras and sensors in vehicles to track drivers' facial expressions, eye movements and head positions to allow AI to spot signs of drowsiness, distraction or impairment.

D. To improve passenger safety when travelling by spotting dangerous items in luggage. AI can quickly look at lots of images to spot dangerous items in luggage such as weapons, explosives and drugs.

E. To manage air traffic and flight routes. AI systems could work alongside human air traffic controllers by providing real-time data to improve flight paths and to take care of routine tasks such as planning when planes arrive and depart.

When presented with this range of transport and travel scenarios, people were most supportive of Scenario D (71%), as shown in **Figure 10.4**. The next most frequently supported transport scenarios were Scenario B (70%), Scenario A (64%) and Scenario E (61%). On the other hand, people were least supportive of Scenario C; around half (51%) of people supported this, and a fifth (20%) opposed it. Across all the transport and travel scenarios, between 14% and 21% selected 'neither support nor oppose', indicating they did not have a strong opinion about AI use in these scenarios.

Figure 10.4: Support/oppose the use of artificial intelligence



Q604 [Postal survey Q37]. To what extent do you support or oppose the use of artificial intelligence (AI) being used in the following transport situations?
Base: All 16+ in UK (unweighted valid responses, Spring 25: 4046 - 4050)

- Men were more likely than women to **support** most uses of AI for transport and travel. For example, they were more likely than women to support Scenario B (74% compared to 67%). However, there was not a statistically significant difference in the level of support for Scenario D between men and women (74% and 70%, respectively).

- London residents were more likely than people living in all other regions of England to **support** Scenario A (70% compared to 63%) and Scenario E (70% compared to 60%).

- People living in households with higher income (earning £52,000 up to £99,999 and £100,000+ per annum) were more likely than people living in households with lower income (earning up to £25,999 per annum) to **support** AI being used across all transport and travel scenarios. For example, higher income households were more likely to support Scenario D (79% for both) compared to the lower income households (65%).

- People who had awareness and self-reported knowledge about AI in transport and travel were more likely than people who had 'never heard of it' to **support** AI being used for all the transport and travel scenarios. For example, those aware and had self-reported knowledge of AI being used in transport and travel were more likely to support Scenario D (75% and 77%, respectively), compared to those who had never heard of it (68%).

- People using a smartphone were more likely than people who did not use a smartphone to **support** the use of AI across all transport and travel scenarios. For example, smartphone users were more likely to support Scenario D (72%) compared to non-smartphone users (55%).

- Younger people aged 16-29 were more likely than older people aged 50-69 and 70+ to **oppose** AI being used in most transport and travel scenarios. For example, younger people were more likely to oppose Scenario D (10%) compared to those aged 50-69 (5%) and 70+ (5%).

11 Appendix

11.1 Methodology

The Department for Transport (DfT) commissioned Ipsos to undertake a series of surveys to measure public awareness, attitudes and behaviours in relation to existing and emerging transport technologies, aiming to:

- Fill gaps in knowledge about what the public know and think via a survey representative of those aged 16+ living in the UK; and
- Identify and analyse differences between population subgroups.

The methodology implemented from the Autumn 2024 wave employed a UK-wide, push-to-web methodology with a postal option, which continued into the Spring 2025 wave. The Spring 2025 wave reached a sample size of 4,058 individuals (unweighted). This approach, implemented from the Autumn 2024 wave, prioritises gathering data from a fresh sample of participants each wave, minimising potential bias and providing a current snapshot of public opinion.

Methodologies used for Transport Technology Tracker:

- Waves 1-5 (2017-2020): Biannual face-to-face omnibus surveys. Due to the Coronavirus pandemic, the survey moved to an online methodology for Wave 6 (August 2020), with a small number of respondents interviewed over the phone.
- Waves 7-11 (2020-2023): Online surveys using Ipsos' KnowledgePanel.
- Waves 12 and 13 (Autumn 2024 and Spring 2025): UK-wide, push-to-web methodology.

All previous wave data can be found here: https://www.gov.uk/government/publications/transport-and-transport-technology-public-attitudes-tracker

The differences in sample composition and measurement mode introduced in Autumn 2024 make comparisons with the previous 11 waves inadvisable. This is because we cannot be certain about the extent to which any observed differences are due to a genuine change in public perceptions or due to the change in methodology. However, all previous reports remain available for those interested in exploring long-term trends. Where questions remain unchanged between the Autumn 2024 and Spring 2025 waves, comparisons have been made in this report.

A representative sample of 4,058 (unweighted) adults aged 16+ across the UK completed the survey between 2nd May and 13th June 2025 during the Spring 2025 wave. Up to two adults (aged 16+) from 15,800 households across the UK were invited to participate in the survey. Participants from across 3,117 households took part, achieving a household response rate of 20% (unweighted).

This data were collected using a UK-wide, push-to-web methodology with a postal survey option. This approach randomly sampled addresses from the Postcode Address File (PAF) and invited residents to participate online. A reminder letter was sent to those who had not responded to the survey online within the first few weeks of the fieldwork. Half of the reminder letters included two paper questionnaires to ensure the inclusion of digitally excluded respondents, whilst the other half of the reminders included

another online survey invitation. Paper questionnaires were also available upon request throughout the entire fieldwork period. 3,414 completed the survey online and 644 completed the paper survey.

Data were weighted by age, gender, region, deprivation quintile, highest level of education, ethnicity and number of adults in the household to reflect the profile of the population. Population profiles were based on data from ONS 2022 mid-year population estimates, the ONS Annual Population Survey 2022-2023 and Census 2021.

This report focuses on the following demographic groups: gender, age, region, urbanity, working status and household income based on the following categories: up to £25,999, £26,000-£51,999, £52,000-£99,999, £100,000+.

Subgroup differences were assessed using Quantum, a well-established, industry-standard tabulation software for market and social research. Statistical significance was evaluated using the proportions/means: columns tested at a 5% risk level (95% confidence). For weighted data, standard errors were based on effective sample size (design-effect adjusted) calculated using the Kish formula. Reporting focuses on a limited set of priority subgroups and highlights only differences identified by this criterion test that are meaningful in context where the effective base size was greater than 100.

Commentary focuses on statistically significant differences between sub-groups in the same category (e.g. different age groups). Lack of reference to other groups and geographies does not mean there are not statistically significant differences – for example, men's claimed levels of awareness and knowledge tend to be higher than women's, and there are some differences between regions. Data tables of the full Spring 2025 wave dataset are published alongside this report.

The total sum of answer codes may appear to be higher/lower than 100% and combinations might not sum to their constituent parts (e.g. 'agree' relative to 'strongly agree'/'tend to agree'). This is due to the rounding of results to the nearest whole number.

11.2 Questionnaire

ASK ALL
TEXT
SurveyIntro

INSERT LANDING PAGE

ASK ALL
NUMERIC
SCREEN OUT AGE < 16 YEARS
D1a.
What was your age on your last birthday?

998. Prefer not to say

ASK THOSE WHO SAID PREFER NOT TO SAY AT D1a [D1a=998]
SINGLE CODE
D1b.
Which age group are you in?

Please select one option only

1. 16 to 20 years
2. 21 to 29 years
3. 30 to 39 years
4. 40 to 49 years
5. 50 to 59 years
6. 60 to 69 years
7. 70 years or older
8. Prefer not to say [SCREEN OUT]

ASK THOSE WHO SAID THEY ARE AGED 16-20 YEARS AT D1b [D1B=1]
SINGLE CODE
D1c.
Are you age 17 years or older?

Please select one option only

1. Yes
2. No
3. Prefer not to say

ASK ALL
TEXT
Intro_1
The following set of questions are asked on behalf of the Department for Transport. The questions are about the different types of transport that you may use and your plans for the future.

ASK ALL AGED 17+ YEAR [D1A =/> 17 OR D1B = CODE 2-7 OR D1C = YES]
SINGLE CODE
Q101
Do you hold a valid UK car driving licence?
This includes international permits or other foreign licences valid in the UK.
Please select one option only

1. Yes, full licence for car
2. Yes, provisional licence for car
3. Currently disqualified
4. No, I do not hold a valid UK driving licence
5. No, I voluntarily surrendered my valid UK driving licence

998. Don't know

ASK ALL
SINGLE CODE
Q102

How many cars or vans does your household own or have continuous use of at present?

Please include company cars or vans if available for your private use. Please also include any broken-down cars or vans which may be in use within the next month.

Please select one option only

1. 1
2. 2
3. 3 or more
4. None

998. Don't know

ASK ALL WITH CARS/VANS IN HOUSEHOLD OR HAVE USE OF THEM (CODES 1-3 AT Q102)
SINGLE CODE
Q103

Do you personally own or have continual use of a car or van?

Please include company cars or vans if available for your private use. Please also include any broken-down cars or vans which may be in use within the next month.

Please select one option only

1. Yes
2. No

998. Don't know

ASK ALL WHO HAVE PERSONAL USE/OWN A CAR OR VAN [CODE 1 AT Q103]
SINGLE CODE
W8 INT Q201

Thinking now about the one car or van that you personally use the most, whether as driver or passenger, what type of vehicle is it?

If you use two or more cars/vans equally, please think about the one you used most recently.

Please select one option only

1. Petrol
2. Diesel
3. Electric/battery only
4. Non-plug in hybrid (i.e combination of electric and petrol)
5. Plug-in hybrid (PHEV)
6. Liquified Petroleum Gas (LPG)
7. Bi-fuel (a combination of two fuels but not hybrid)
8. Other (please specify)

998. Don't know

ASK ALL
SINGLE CODE
Q104

When, if at all, do you think you will personally next buy, lease or replace a car or van, either new or second hand?

Please select one option only

1. Within the next year
2. In more than 1 year, but up to 2 years
3. In more than 2 years, but up to 3 years
4. In more than 3 years, but up to 5 years
5. In more than 5 years
6. I don't intend to ever buy or replace a car/van
998. Don't know

ASK ALL WHO INTEND TO BUY OR REPLACE A CAR/VAN- (CODES 1-5 AT Q104)
SINGLE CODE
Q105

And is the car or van that you intend to buy or lease in the future more likely to be new or second hand?
Please select one option only

1. More likely to be a new car/van
2. More likely to be a second-hand car/van
998. Don't know

ASK ALL WHO INTEND TO BUY OR REPLACE A CAR/VAN (CODES 1-5 AT Q104)
SINGLE CODE
Q106

What type of car or van do you think you will most likely purchase or lease next time?
If you would buy more than one type, please select which one you would use for your main vehicle.
Please select one option only

1. Petrol car or van
2. Hybrid car or van (petrol and electric)
3. Diesel car or van
4. Electric/battery only car or van
5. Other (please specify) [FIX]
998. Don't know [FIX]

ASK ALL WHO WILL MOST LIKELY PURCHASE A HYBRID CAR/VAN (CODE 2 AT Q106)
SINGLE CODE
Q107

What type of hybrid car or van do you think you will most likely purchase or lease next time?
Please select one option only

1. A plug-in hybrid (that plugs in to an external power source to recharge)
2. A non-plug-in hybrid (that recharges while driving and is ultimately fuelled by petrol or diesel – it cannot be plugged in to an external power source)
3. Undecided [FIX]
998. Don't know [FIX]

ASK ALL
SINGLE CODE
Q108

The next set of questions are about electric vehicles. Unlike hybrid cars or vans, battery electric vehicles run fully off electricity. These fully electric cars or vans plug in to an external power source to recharge.

Before today, how much, if anything, would you say you knew about electric cars or vans?
Please select one option only

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them

998. Don't know

ASK ALL
ALLOW MULTICODE 1-8
Q111

Which of the following, if any, do you think are advantages of fully electric over petrol or diesel cars or vans?

Please select all that apply

1. Environmental benefits (e.g. reduced pollution)
2. Cheaper to run or maintain
3. Less noisy
4. Reduced road tax
5. Better vehicle performance (e.g. speed, handling, size, looks)
6. No need to visit petrol stations to top-up fuel
7. Recharging is easier/more convenient than re-fuelling
8. Other (please specify) [FIX]
9. None of these – I don't believe there are any advantages [FIX] [EXCLUSIVE]
998. Don't know [FIX] [EXCLUSIVE]

ASK ALL
ALLOW MULTICODE 1-9
Q113

Which of the following, if any, do you think are disadvantages of fully electric over petrol or diesel cars or vans?

Please select all that apply

1. Less distance can be travelled on one charge
2. Not enough charging points
3. Expensive to run or maintain
4. Knowing where and how to charge
5. The time taken to recharge
6. Cost to buy
7. The need to recharge
8. Negative impacts on the environment
9. Other (please specify) [FIX]
10. None of these – I don't believe there are any disadvantages [FIX] [EXCLUSIVE]
998. Don't know [FIX] [EXCLUSIVE]

ASK ALL
SINGLE CODE
Q117

Now a few questions about self-driving vehicles.

Self-driving vehicles are not yet available for everyday use in the UK. In the future, self-driving vehicles will be available.

Self-driving vehicles can drive by themselves, they are fully automated. They do not need a human to drive them. They are different to vehicles currently available that offer advanced driving assistance features.

When self-driving mode is active, the vehicle will be responsible for the entire driving task and the driver will not be responsible for monitoring the road and responding to events in road traffic unless requested to do so by the vehicle.

Before today, how much, if anything, would you say you knew about self-driving vehicles?

Please select one option only

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them

998. Don't know

ASK ALL
ALLOW MULTICODES 1-8
Q150
Which of the following, if any, do you think are advantages of self-driving vehicles that are available for personal use such as cars and vans?
Please select all that apply
1. They are safer due to less chance of driver error
2. Allows the driver to do other things while travelling
3. Does not require a human driver who is qualified and fit to drive
4. Less driver fatigue
5. Allows for better traffic flow and less congestion
6. Driving would be less stressful
7. Easier journeys
8. Other (please specify)
9. None of these – I don't believe there are any advantages [EXCLUSIVE]
998. Don't know [EXCLUSIVE]

ASK ALL
ALLOW MULTICODES 1-8
Q151
Which of the following, if any, do you think are disadvantages of self-driving vehicles that are available for personal use such as cars and vans?
Please select all that apply
1. Less safe for vehicle drivers/passengers
2. Less safe for other road users and pedestrians
3. Loss of human driver control
4. Drivers will become lazy and pay less attention
5. Loss of driving skills
6. The technology is still unproven
7. More expensive to buy and maintain
8. Other (please specify)
9. None of these – I don't believe there are any disadvantages [EXCLUSIVE]
998. Don't know [EXCLUSIVE]

ASK ALL
MULTICODE 1-7
Q152
Self-driving vehicles could also be used for public transport, like buses and taxis. The next questions will explore the potential advantages and disadvantages of self-driving vehicles used for public transport.
Which of the following, if any, do you expect to be advantages of self-driving vehicles that are used for public transport such as self-driving buses and taxis?
Please select all that apply
1. They are safer due to less chance of driver error
2. Does not require a human driver who is qualified and fit to drive
3. Less driver fatigue
4. Allows for better traffic flow and less congestion
5. More frequent services available
6. Cheaper transport options
7. Other (please specify)
8. None of these – I don't believe there are any advantages [EXCLUSIVE]
998. Don't know [EXCLUSIVE]

ASK ALL
ALLOW MULTICODES 1-9
Q153
Which of the following, if any, do you expect to be disadvantages of self-driving vehicles that are used for public transport such as self-driving buses and taxis?
Please select all that apply
1. Less safe for vehicle drivers/passengers
2. Less safe for other road users and pedestrians

3. Loss of human driver control
4. Drivers will become lazy and pay less attention
5. Loss of driving skills
6. Loss of jobs
7. The technology is still unproven
8. More expensive to buy and maintain
9. Other (please specify)
10. None of these – I don't believe there are any disadvantages [EXCLUSIVE]
998. Don't know [EXCLUSIVE]

ASK ALL
SINGLE CODE
Q130

A drone is an unmanned aerial vehicle guided by remote control or on-board computers.

Before today, how much, if anything, would you say you knew about drones?
Please select one option only

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL WHO HAVE HEARD OF DRONES BEFORE TODAY – CODES 1-4 at Q130
ALLOW MULTI-CODES 1-9
Q132

Here are a number of examples of things that drones have been used for.
Which of these uses of drones, if any, have you personally heard of before today?
Please select all that apply

1. Leisure use (e.g. flying drones for fun, to take pictures & videos)
2. Armed forces/military use (e.g. surveillance, airstrikes)
3. Police use (e.g. monitoring borders, surveillance)
4. Professional photography, filming and journalism
5. Emergency response (e.g. search and rescue)
6. Retail use (package delivery)
7. Retail use (stock checking)
8. Infrastructure management (e.g. building/bridge inspection, monitoring crops or livestock)
9. Distributing medical supplies (e.g. medicines, blood supplies)
10. None of the above [EXCLUSIVE]

ASK ALL
SINGLE CODE
Q133

To what extent do you support or oppose drones being used in the following situations?
Please select one option only for each statement

a) Leisure use (e.g. flying drones for fun or to take pictures & videos)
b) Armed forces/military use (e.g. surveillance, air strikes)
d) Police use (e.g. monitoring borders, surveillance)
e) Professional photography, filming and journalism
f) Emergency response (e.g. search and rescue)
g) Retail use (package delivery)
h) Retail use (stock checking)
i) Infrastructure management (e.g. building/bridge inspection, monitoring crops or livestock)
i) Distributing medical supplies (e.g. medicines, blood supplies)

1. Strongly support
2. Tend to support
3. Neither support nor oppose
4. Tend to oppose
5. Strongly oppose
998. Don't know [FIX]

ASK ALL
ALLOW MULTI-CODES 1-10
Q135

Which of the following concerns, if any, do you have about the use of drones?
Please select all that apply

1. Concerns about privacy and intrusion
2. Concerns about collisions, crashes or accidents
3. The potential misuse of drones (e.g. hacking, terrorism, used by criminals)
4. Difficulty of tracing drone owners/operators and who can buy them
5. Noise pollution
6. Visual pollution
7. Impact on jobs (e.g. if drones take over human job roles)
8. The use of drones in the military if used as a weapon
9. Cost of buying and maintaining drones
10. Other (please specify)
11. None of these [EXCLUSIVE]
12. I don't know enough about drones to have an opinion [EXCLUSIVE]
998. Don't know [EXCLUSIVE]

ASK ALL
SINGLE CODE PER STATEMENT
Q500

How many times, if any, have you made a trip in a ferry in the last 12 months?
Please count the outward and return ferry, and any transfers as 1 trip.

A) Trips by ferry within the UK
B) International trips by ferry outside the UK. Please only include ferry trips that start or end in the UK.

Please select one option only

1. None
2. 1 ferry trip
3. 2-4 ferry trips
4. 5-10 ferry trips
5. 11 or more ferry trips
998. Don't know

ASK ALL
SINGLE CODE PER STATEMENT
Q501
Ferries are currently generally powered by fossil fuels. In the future, they could use other fuel types which can lower their greenhouse gas emissions, sometimes called low carbon fuels.

Some examples include hydrogen, ammonia, methanol, biofuels, and electricity.

Before today, how much, if anything, would you say you knew about the use of these low carbon fuels for ferries?

A) Ferries powered by ammonia
B) Electric powered ferries

Please select one option only
1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't Know

ASK ALL
SINGLE CODE
Q502
Would you be willing to travel on a ferry powered by low carbon fuels?

A reminder that some of the green alternative fuel types that ferries could be powered by are electricity,

hydrogen, ammonia, methanol and biofuels.

Please select one option only
1. Very willing
2. Fairly willing
3. Neutral
4. Fairly unwilling
5. Very unwilling
998. Don't know

ALLOCATE ONE OPTION TO BE SHOWN (OPTION A/B/C) DECIDED BASED ON SAMPLE FILE. THIS IS TO MATCH THE FIGURE DISPLAYED AT Q312.
SINGLE CODE
Q503
Low carbon fuels, such as electricity, hydrogen, ammonia, methanol and biofuels can cost more money than fossil fuels such as diesel, but are more environmentally friendly. Ferries powered by low carbon fuels would take the same amount of travel time as using traditional fossil fuels.

Imagine you're about to book a short ferry journey, of under 3 hours, with a fare of £100 for yourself and a vehicle. Assuming that the journey time is unchanged, how likely or unlikely are you to personally pay extra for a ferry journey that was powered by green alternatives (such as electricity, hydrogen, ammonia, methanol or biofuels), if you were charged:

A. An extra £5
B. An extra £10
C. An extra £20

Please select one option only
1. Very likely
2. Fairly likely
3. Neither likely or unlikely
4. Fairly unlikely
5. Very unlikely
998. Don't know

ASK ALL
SINGLE CODE PER STATEMENT
Q160
How many times, if any, have you made a trip in a plane in the last 12 months?
Please count the outward and return flight, and any transfers as 1 trip.

A) Internal flights within the UK
B) International flights departing from the UK and/or arriving to the UK from abroad.

Please select one option only
1. None
2. 1 plane trip
3. 2-4 plane trips
4. 5-10 plane trips
5. 11 or more plane trips
6. Don't know

ASK ALL
SINGLE CODE
Q146
Battery-powered electric planes use electricity rather than fuel for power.
Before today, how much, if anything, would you say you knew about battery-powered electric planes?
Please select one option only
1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL
MULTI CODE
Q161
What concerns, if any, do you have about battery-powered electric planes?

Please select all that apply
1. Poses a safety risk to passengers
2. Increased travel cost
3. Concerns about the distance you can travel (e.g. battery life)
4. Environmental impact
5. Concerns about new/unproven technologies
6. Other (please specify)
7. I do not have any concerns [EXCLUSIVE]
998. Don't know [EXCLUSIVE]

ASK ALL
SINGLE CODE
Q148
Hydrogen planes are powered by hydrogen fuel. They are powered either by converting hydrogen into electricity or by directly burning hydrogen fuel.

Before today, how much, if anything, would you say you knew about hydrogen-powered planes?
Please select one option only
1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL
OPEN-ENDED QUESTION
Q162
What concerns, if any, do you have about hydrogen-powered planes?
Please select all that apply
1. Safety concerns – relating to accidents/crashes
2. Risk of fire/combustion/explosions
3. Concerns about new/unproven technologies
4. Current lack of infrastructure to support hydrogen refuelling and maintenance
5. Environmental impact
6. Increased travel cost
7. Other (please specify)
8. I do not have any concerns [EXCLUSIVE]
998. Don't Know [EXCLUSIVE]

ASK ALL
SINGLE CODE
Q310

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL
SINGLE CODE
Q311
Sustainable aviation fuels are greener alternatives to aviation fuels currently in use, however, they are currently more expensive.

In principle, to what extent would you support or oppose airlines charging higher fares for journeys using sustainable aviation fuel?
Please select one option only
1. Strongly support
2. Tend to support
3. Neither support or oppose
4. Tend to oppose
5. Strongly oppose

998. Don’t know

ALLOCATE ONE OPTION TO BE SHOWN (OPTION A/B/C) DECIDED BASED ON SAMPLE FILE. THIS IS TO MATCH THE FIGURE DISPLAYED AT Q312. SINGLE CODE
Q312
Imagine you’re about to book a short haul flight, that is a flight of three hours or less and the fare was £100.

Assuming that the journey time is unchanged, how likely or unlikely do you think you would personally be to pay extra for a flight that was made using greener alternatives (such as sustainable aviation fuel or a hydrogen-powered plane) if you were charged:

A) An extra £5
B) An extra £10
C) An extra £20

Please select one option only
1. Very likely
2. Fairly likely
3. Neither likely nor unlikely
4. Fairly unlikely
5. Very unlikely
998. Don’t Know

ASK ALL
SINGLE CODE
Q600
The next questions are about your general awareness and knowledge of artificial intelligence (AI) and its use in transport.

Artificial intelligence (AI) is a technology that can learn how to perform tasks by processing large amounts of data such as text and images.

AI can perform tasks usually done by humans, either independently or in cooperation with them. AI is currently used in a variety of ways, including online product recommendations, facial recognition, ChatGPT, and smart thermostats.

You do not need to know anything about AI to answer the following questions.

Before today, how much, if anything, would you say you knew about artificial intelligence (AI)?

Please select one option only
1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about it
5. Never heard of it
998. Don’t know

ASK ALL
SINGLE CODE
Q601
Before today, how much, if anything, would you say you knew about the use of artificial intelligence (AI) in transport and travel?
Please select one option only
1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about it
5. Never heard of it
998. Don't know

ASK ALL
OPEN ENDED
Q602
What, if any, do you think are advantages of artificial intelligence (AI) being used in transport and travel?
Please type in the box below. You can write as many advantages as you like.

OPEN TEXT BOX

998. None – I don't believe there are any advantages [EXCLUSIVE]
999. Don't know [EXCLUSIVE]

ASK ALL
OPEN ENDED
Q603
What, if any, do you think are disadvantages of artificial intelligence (AI) being used in transport and travel?
Please type in the box below. You can write as many disadvantages as you like.

OPEN TEXT BOX

998. None – I don't believe there are any disadvantages [EXCLUSIVE]
999. Don't know [EXCLUSIVE]

ASK ALL
SINGLE CODE
Q604
To what extent do you support or oppose the use of artificial intelligence (AI) being used in the following transport situations?

Please select one option for each statement.
A) To check transport structures (e.g. bridges, rail tracks, roads) for wear and tear and to make sure they are safe. AI can analyse images and data from sensors and cameras far quicker than a human and can increase how often inspections take place. A human oversees the outputs to check for errors.
B) To improve people's journey experience when travelling by using real-time data. For example, AI can use real-time traffic data on roads to change traffic light timings to help traffic move better and reduce congestion.
C) To make drivers and vehicles safer. This can be done by using cameras and sensors in vehicles to track drivers' facial expressions, eye movements and head positions to allow AI to spot signs of drowsiness, distraction or impairment.
D) To improve passenger safety when travelling by spotting dangerous items in luggage. AI can quickly look at lots of images to spot dangerous items in luggage such as weapons, explosives and drugs.
E) To manage air traffic and flight routes. AI systems could work alongside human air traffic controllers by providing real-time data to improve flight paths and to take care of routine tasks such as planning when planes arrive and depart.

Please select one option only
1. Strongly support
2. Tend to support
3. Neither support nor oppose
4. Tend to oppose
5. Strongly oppose
6. Don't know

These next questions are about your general travel habits, current behaviour and personal circumstances.

ASK ALL
SINGLE CODE
D13.
Do you personally use a smartphone?

A smartphone is a phone on which you can access emails, use apps, and view websites. Popular brands of smartphone include iPhone and Android phones such as the Samsung Galaxy.

Please select one option only
1. Yes
2. No
3. Don't know

ASK THOSE WHO RESPONDED YES AT D13 [D13=1]
SINGLE CODE
D14.
Do you typically use your smartphone to go online for any of these purposes?
Please select all that apply.
1. Route planning/route planning apps
2. Maps/navigation/satnavs
3. Checking live travel times (e.g. bus, train, tram, flights etc.)
4. Buying train tickets online
5. Buying bus/other public transport tickets online
6. Checking traffic updates
7. Booking a taxi or minicab using an app (such as Uber)
8. E-scooter/e-cycle hire via an app
9. Electric vehicle charging via an app
10. Finding out about services available in the area (e.g. restaurants, cafes, shops, garages)
11. None of these [FIX, EXCLUSIVE]

ASK ALL
MULTICODE 1-14
B17.
Looking at this list, which of these things are important to you when buying a car or van?

Please select all that apply.
1. Comfort
2. Costs – purchase/running/resale value/tax/insurance
3. Small engine
4. Large engine
5. Environmentally friendly/low CO2 Emissions
6. Image of brand/brand preference
7. Image of model/model preference
8. Interior space/functionality/boot size
9. Reliability
10. Safety

11. Speed/performance
12. Style/design
13. Features – automated parking; adaptive cruise control; in-car Wi-Fi connection etc.
14. Other (please specify)
998. Don't know/I am not in a position to buy a car or van [FIX, EXCLUSIVE]

ASK ALL
SINGLE CODE
CN76
And how often nowadays, if at all, do you use home delivery (e.g. internet shopping/telephone ordering) for any non-food shopping, such as for buying books, music, clothes, holidays, or insurance?

Please select one option only
1. Regularly
2. Sometimes
3. Have only done this once or twice
4. Never
998. Don't know

ASK ALL
MULTICODE
B2.
Do you have any disability or other long-standing health problem that makes it difficult for you to do any of the following?

Please include difficulty due to old age.

Please select all that apply
1. Go out on foot
2. Use local buses
3. Get in or out of a car
998. None of these [EXCLUSIVE]

ASK ALL
SINGLE CODE
B39b
Do you have any disability or other long standing health problem that makes it/would make it difficult or impossible for you to ride a bicycle?

Please include difficulty due to old age.

Please select one option only
1. Yes – impossible
2. Yes – difficult
3. No
998. Don't know

ASK ALL
SINGLE CODE
F5.
Do any children live with you either all or some of the time? By children, we are referring only to children under the age of 16.

Please select one option only.
1. Yes
2. No
3. Prefer not to say

ASK ALL
SINGLE CODE
F12.
Please indicate whether you have any of the educational or school qualifications listed.

Please select your highest level of education or qualification.

Please select one option only
1. University Higher Degree (e.g. MSc; PhD)
2. First degree level qualification (e.g. BA; BSc) including foundation degrees; PGCE
3. Diploma in higher education; HNC; HND; Nursing or Teaching qualification (excluding PGCE)
4. A level; AS level; NVQ level 3; GNVQ Advanced; or equivalent
5. GCSE grade A* - C; O level; CSE grade 1; NVQ level 2; GNVQ intermediate; or equivalent
6. GCSE grade D – G; CSE below grade 1; NVQ level 1; GNVQ Foundation level; or equivalent
7. None of the above
8. Prefer not to say

ASK ALL
SINGLE CODE
D2.
Which of the following best describes your gender?

Please select one option only
1. Man
2. Woman
3. Non-binary
4. My gender is not listed
5. Prefer not to say

ASK ALL
SINGLE CODE
D3.
Including yourself, how many people aged 16 and over live in your household?

If you are the only adult in your household, please type 1.

| people aged 16 and over

988. Prefer not to say

ASK ALL
SINGLE CODE
D4.
Which of these best describes your current situation?

Please select one option only
1. Working full-time (30+ hours)
2. Working part-time (8-29 hours)
3. Unemployed – less than 12 months
4. Unemployed (long term) – more than 12 months
5. Not working – retired
6. Not working – looking after house/children
7. Not working – long term sick or disabled
8. Student – in full-time education studying for a recognised qualification
9. Student – in part-time education studying for a recognised qualification
10. Other
11. Prefer not to say

ASK ALL
SINGLE CODE
D5.
Does your household own or rent this accommodation?

Please select one option only
1. Buying it on a mortgage
2. Own it outright
3. Rent it from Local Authority
4. Rent it from Housing Association/Trust
5. Rent it from private landlord
6. Other
998. Don't know
999. Prefer not to say

ASK ALL
SINGLE CODE
D6.
What is the total income of your household as a whole (earned by all members of your household), per year from all sources before tax – including benefits, saving and so on?

Please select one option only
1. Up to £25,999
2. £26,000 up to £51,999
3. £52,000 up to £99,999
4. £100,000 and above
998. Don't know
999. Prefer not to say

ASK ALL
SINGLE CODE
D7.
Which one of the following best describes your ethnic group or background?

Please select one option only
A. White
   1. English, Welsh, Scottish, Northern Irish or British
   2. Irish
   3. Gypsy or Irish Traveller
   4. Roma
   5. Any other White background
B. Mixed or Multiple ethnic groups
   6. White and Black Caribbean
   7. White and Black African
   8. White and Asian
   9. Any other Mixed or Multiple ethnic background
C. Asian or Asian British
   10. Indian
   11. Pakistani
   12. Bangladeshi
   13. Chinese
   14. Any other Asian background
D. Black, Black British, Caribbean or African
   15. Caribbean
   16. African
   17. Any other Black, Black British, Caribbean or African background

E. Other ethnic group
18. Arab
19. Any other ethnic group

20. Prefer not to say

ASK ALL
TEXT
NS-SEC_INTRO
The final few questions refer to your current main job, or, if you are not working now, to your last main job.

ASK ALL
SINGLE CODE
D8.
Do (did) you work as an employee or are (were) you self-employed?

Please select one option only.

1. Employee
2. Self-employed with employees
3. Self-employed or freelance without employees
4. I have never had a job

ASK THOSE WHO HAVE/HAD A JOB (D8=1 OR 2)
SINGLE CODE
D9.
How many people work (worked) for your employer at the place where you work (worked)? If you are self-employed: How many people do (did) you employ?

Please select one option only

1. 1 to 24
2. 25 or more
998. Don’t know
999. Prefer not to say

ASK THOSE WHO HAVE/HAD A JOB (D8=1 OR 2)
SINGLE CODE
D10.
Do (did) you supervise any other employees?

A supervisor is responsible for overseeing the work of other employees on a day-to-day basis.

Please select one option only
1. Yes
2. No

ASK THOSE WHO HAVE/HAD A JOB (D8=1 OR 2 OR 3)
SINGLE CODE
D11.
Which of the following best describes the sort of work you do in your current job?

If you are not working now, please select which best described what you did in your last job.

Please select one option only

1. **Modern professional occupations**

Such as: teacher, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above) or software designer

2. **Clerical and intermediate occupations**
   Such as: secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary or nursery nurse
3. **Senior managers or administrators**
   Such as: finance manager or chief executive (usually responsible for planning, organising and co-ordinating work, and for finance)
4. **Technical and craft occupations**
   Such as: motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener or train driver
5. **Semi-routine manual and service occupations**
   Such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist or sales assistant
6. **Routine manual and service occupations**
   Such as: HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter/waitress or bar staff
7. **Middle or junior managers**
   Such as: office manager, retail manager, bank manager, restaurant manager, warehouse manager or publican
8. **Traditional professional occupations**
   Such as: accountant, solicitor, medical practitioner, scientist or civil/mechanical engineer
9. Prefer not to say

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