

URBAN AIR MOBILITY 10 KEY SURVEY RESULTS

Urban Air Mobility (UAM) is a new mode of air transport of goods and passengers in urban environments, using electric aircraft taking off and landing vertically, with or without a pilot on board. First operations will be a reality 3 to 5 years from now.

1

A POSITIVE INITIAL ATTITUDE TO UAM THROUGHOUT THE EU

83% express an initial positive attitude towards UAM

64% and 49% ready to try out drones and air taxis respectively



Very homogeneous replies and no major differences across cities and respondent groups

2

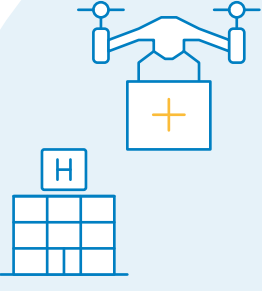
STRONG SUPPORT FOR USE CASES THAT ARE VALUABLE TO ALL

Emergency and/or medical transport use cases receive greatest public interest. Top three use cases:

41% transport of injured person to hospital

41% drone delivery of groceries or medical supplies to hospitals

36% transport of emergency medical personnel



3

TOP 3 EXPECTED BENEFITS: FASTER, CLEANER, EXTENDED CONNECTIVITY

71% improved response time in emergencies

51% reduction of traffic jams

48% reduction of local emissions

41% development of remote areas



4

TOP 3 CONCERNS: SAFETY, ENVIRONMENT/NOISE AND SECURITY

Concerns on drones

44% safety

39% security

35% environmental

28% noise

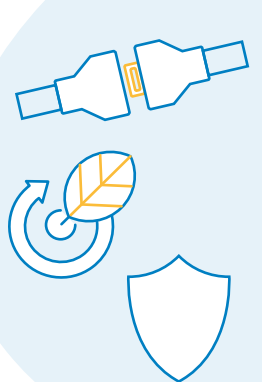
Concerns on air taxis

38% environmental

38% noise

37% safety

29% security



5

SAFETY: EXISTING AVIATION SAFETY LEVELS ARE THE BENCHMARK



Citizens expect that operations are as safe as current aviation

Concerns increase with age of respondent

6

ENVIRONMENT: PRIORITY IS PROTECTION OF WILDLIFE

Most concerns are on:

Negative impact on animals **62%** for drones

56% air taxis

Noise pollution **52%** for drones

53% air taxis

Environmental and climate impact from production, incl. battery **43%** for drones

42% air taxis



7

NOISE: ACCEPTABLE AT LEVEL OF FAMILIAR CITY SOUNDS



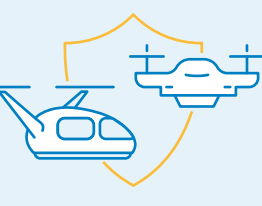
Level of annoyance varies with lack of familiarity with the sound; familiar city sounds at same decibel levels are better accepted

8

NEED TO BUILD CONFIDENCE AND TRUST IN CITIZENS

Level of trust on security and cybersecurity of UAM technology just slightly above **50%**

Half of the respondents would better trust UAM if security and cybersecurity regulations were adopted by all levels of European authorities working together



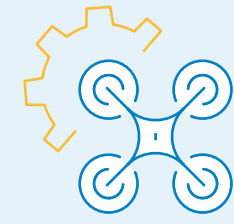
9

GROUND INFRASTRUCTURE: MUST INTEGRATE WELL

Vertiports to be integrated within local mobility network

Drone delivery preferred close to the house (garden **68%**, station in neighborhood **67%**)

Concerns on noise (**48%**), safety (**41%**) and visual impact to be addressed



10

REGULATORY AUTHORITIES: MUST WORK TOGETHER AT ALL LEVELS

Similar trust level towards local, regional, national and European authorities to address UAM

Expectation by respondents is that local actors will contribute in developing the regulations



Context: While UAM projects and demonstrators are developing in Europe, EASA wants to anticipate this new mode of transport and provide an enabling comprehensive regulatory environment for the EU to become one of the first movers in this field at global level. To this effect, EASA conducted in early 2021 a study to measure the societal acceptance by EU citizens of UAM operations. Read more at www.easa.europa.eu/UAM