Perceptions of drone technology

April 2023



Approach

Objectives

• To assess public understanding of, and excitement towards, drone technology

Methodology

• The research was conducted using Yonder's online omnibus among a nationally representative sample of 2,092 UK adults between 29 and 30 March 2023

Headlines

1

While the public is largely undecided about drone technology, with similar proportions of society excited and anxious, levels of excitement skew with age: younger people are particularly excited by the potential of drones.

2

The majority of UK consumers would be happy with – and happy to see government/regulators allow – a wide range of use cases for drones, in particular missing person searches and firefighting.

Indeed, people's biggest perceived benefit of drones is increasing human safety by sending drones to do jobs that are more risky/ dangerous.

3

Once presented with potential use cases, twothirds of people think that drones will have a positive impact on their lives; younger people are especially optimistic.

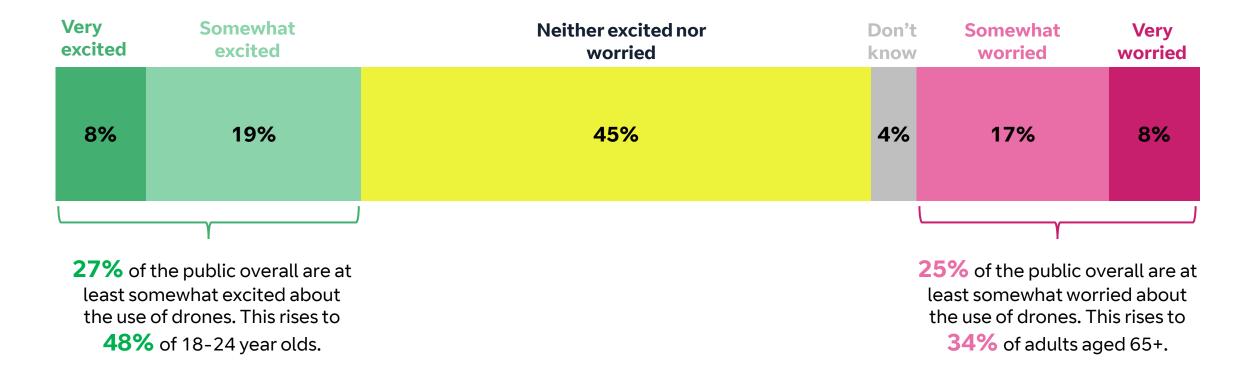
4

The public sees an important role for drone technology to play in assisting public services and reducing carbon emissions.

They are less concerned about positioning the UK as a global leader in the space, but largely agree that it is important to promote the use and benefits of drones.

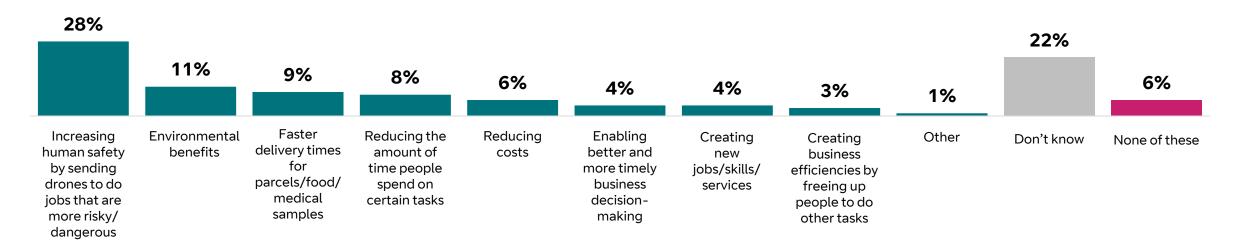
Though most UK consumers are undecided about the potential of drones, young people are particularly likely to be excited about the technology

Q. Which of the following best describes your attitude towards the use of drones and how they might be used in the future?



Sending drones to do dangerous jobs in order to increase human safety is most frequently cited as the greatest benefit of drone usage

Q. Which of the following, if any, would you say is the biggest benefit of drones being used?



The majority of UK consumers would be happy with a wide range of use cases for drones, in particular missing person searches and firefighting

Q. Below are several examples of how drones might be used by businesses and organisations in the future. For each example, please tell us how you feel about drones being used for this purpose.

I would be happy
I'm not sure yet
I would not be happy

Missing person searches	86%	12	<mark>%2</mark> %
Firefighting	82%	14%	<mark>4%</mark>
Conservation	77%	19%	<mark>4%</mark>
Crime scene investigation	77%	19%	<mark>4%</mark>
Monitoring air pollution	77%	19%	<mark>4%</mark>
Film-making	76%	20%	<mark>4%</mark>
Infrastructure inspection	74%	21%	5%
Traffic management	73%	23%	5%
Agriculture use	69%	25%	5%

Identifying and tracking criminals	66%			27%		7%		
Border patrol	65%				27% 7			
Crowd monitoring	64%				2	8%		
Boosting networks	53%				38%			9%
Delivery of medical supplies	52%			35%			12%	
Private security	43%			42		:%		15%
Home package delivery	34%		44%		22		2%	
Food and grocery delivery	31%		45%		24%		!%	
Air taxis	18%		46%		36%			

Source: Yonder BT Drone Survey, March 2023. Base: All (2,092) 6

Once presented with potential use cases, two-thirds of people think that drones will have a positive impact on their lives; younger people are again especially optimistic

Q. Thinking about the different use cases for drones that you've been shown on the previous screens, on balance, do you think that drones will have a positive impact, a negative impact, or no impact, on your life in the future?

Very	Fairly	No impact	Don't Fairly	
positive	positive	at all	know negativ	
15%	52%	13%	13%	5% 2%

67% think that drones will have at least a fairly positive impact on their lives in the future. This rises to 82% of 18-24 year olds.

The majority of the public are happy for the Government to allow more frequent drone flights for a range of purposes, in particular missing person searches and firefighting

Q. Below are examples of scenarios in which drone flights over long distances could take place. For each example, please tell us how you would feel about the Government and regulators allowing more frequent drone flights for the purpose outlined.

I would be happy

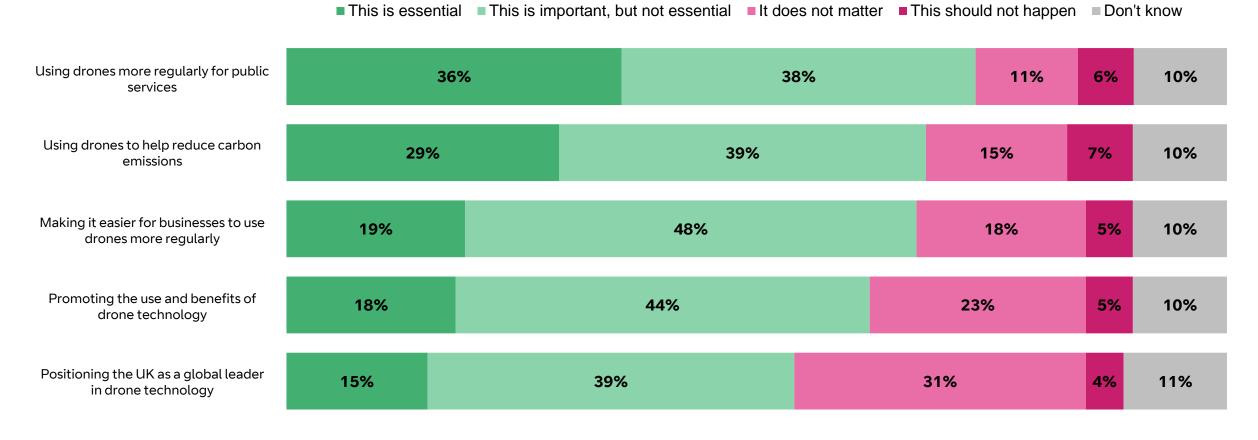
I would not be happy

Missing person searches	79%	17%	<mark>4%</mark>
Firefighting	77%	20%	<mark>4%</mark>
Crime scene investigation	73%	23%	5%
Conservation	73%	23%	5%
Monitoring air pollution	71%	24%	5%
Infrastructure inspection	71%	25%	<mark>4%</mark>
Traffic management	68%	27%	<mark>5%</mark>
Agriculture use	68%	27%	6%
Film-making	66%	27%	7%

Identifying and tracking criminals	63%			30% 8			
Border patrol	61%			30%	9%		
Crowd monitoring	58%			33%	9%		
Boosting networks	52%		36%				
Delivery of medical supplies	48%		39%		13%		
Private security	40%		41%		18	18%	
Home package delivery	32%	45%		2		%	
Food and grocery delivery	32%	44%		2		4%	
Air taxis	20%	9% 45%		35%			

Three-quarters of the public think it's important or essential for drones to be used to assist public services, with more than one-third saying it's essential

Q. Please carefully read the following statements about the development of drone technology and select the answer that most closely aligns with your view.



9 Source: Yonder BT Drone Survey, March 2023. Base: All (2,092)