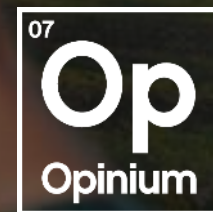




CAA

Drone Awareness Tracker

April 2023



What people think,
feel and do

Objectives of the study

This is the eighth wave of the Drone Awareness Tracker which continues to evolve and explore different topical areas amongst the general public and drone users. Our key objectives remain:

To track:

- 1 The change in awareness and recall of the rules when flying a drone in the UK
- 2 Awareness of the registration requirement when flying a drone in the UK

To explore and understand:

- 1 Barriers to registration
- 2 Awareness, perceptions and attitudes towards drone regulation and safe use
- 3 Attitudes to future uses of drones
- 4 Exploring how the CAA can motivate more drone owners to register



Nationally representative sample

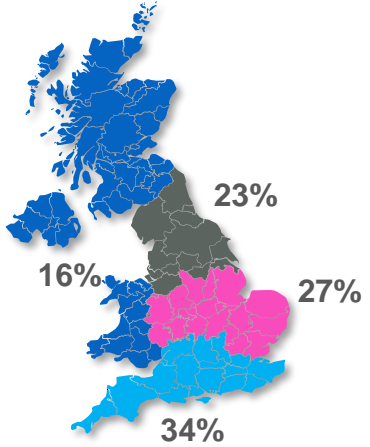
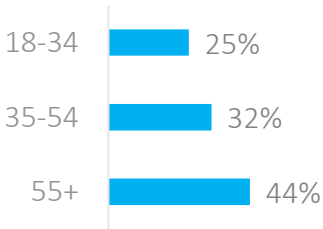
We conducted a research study consisting of 2,000 adults representative of the UK followed by a boost of drone users

Sample

1

2,000 adults aged 18+ representative of the UK
15 minute online interview

Breakdown



Drone users

| Year | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|------------|------|------|------|------|------|------|------|------|
| Percentage | N/A | 2% | 2% | 3% | 4% | 3% | 9% | 5% |

Drone User sample

Sample



Sample

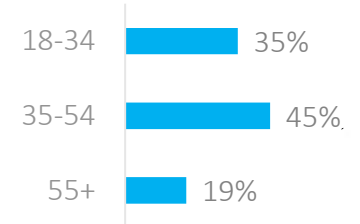
2

Sample boost to provide **500** drone users
15 minute online interview

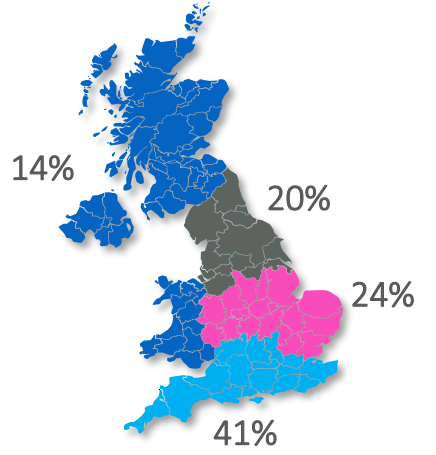
Breakdown



Average frequency of flying per month
6 times



Years experience using a drone
2.5 years



Reason for flying a drone

| | |
|-------------|-------|
| For fun | 79% |
| Photography | 46% ↑ |
| For work | 14% |

↑ ↓ Significant shift vs previous wave



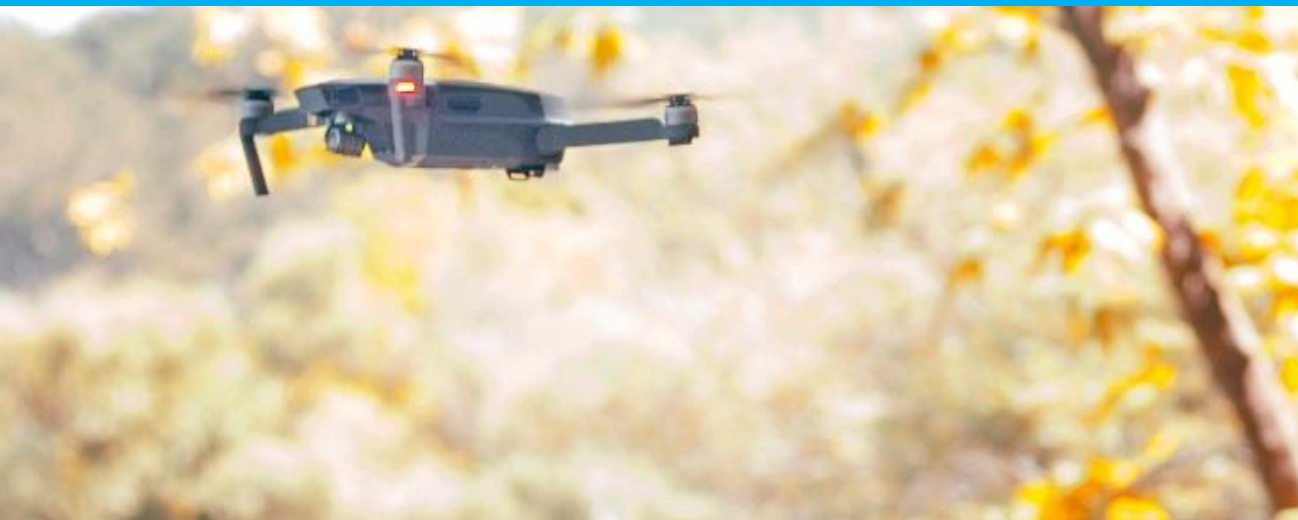
Executive summary

- 1 Awareness of the height restriction of flying a drone has increased amongst drone users, and is now at the highest level since research started 8 years ago
- 2 There is less clarity over the requirements of drone tests and registration for drone owners. Large proportions of users believe drone tests and registration are just for larger drones, and there is little knowledge of what Flyer IDs and Operator IDs are. More education and communication around this is needed.
- 3 The number of drone users registered continues to drop, including those who have registered in the last 12 months. Barriers to registration are a lack of awareness of requirement, as well as not seeing any benefit in doing so.
- 4 Motivators for registration would be if the police started issuing fines, as well as if users were granted access to fly in more places. News on drones is also welcome and there is interest in receiving this from the CAA
- 5 The biggest growth areas for commercial drone use is considered to be in deliveries and travel, with the general public expecting both services to continue to grow over the next 20 years

1

Safety

Identifying changes in awareness of the rules when flying a drone



Registration

Measuring awareness of registration and likely impacts of the requirement

2

Innovation

What are the future uses and services of drones?

3



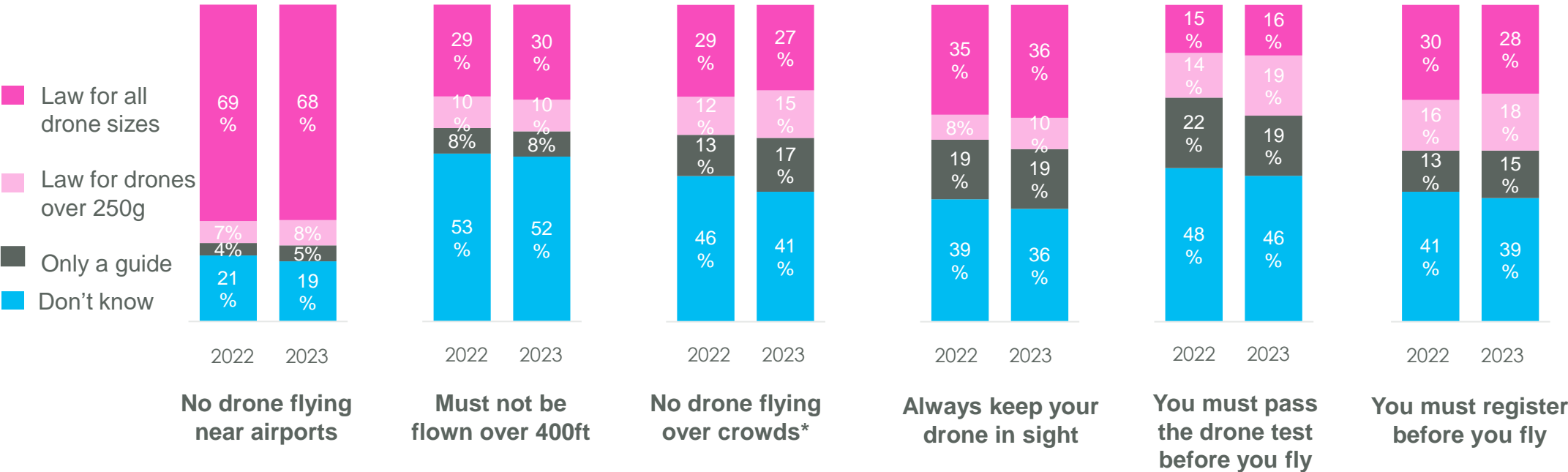
SAFETY

Measuring awareness of drone flying rules

Public understanding of drone flying rules has remained consistent, with confusion arising over most rules, apart from airport restrictions which is widely recognised



Drone flying rules – law or guidance?



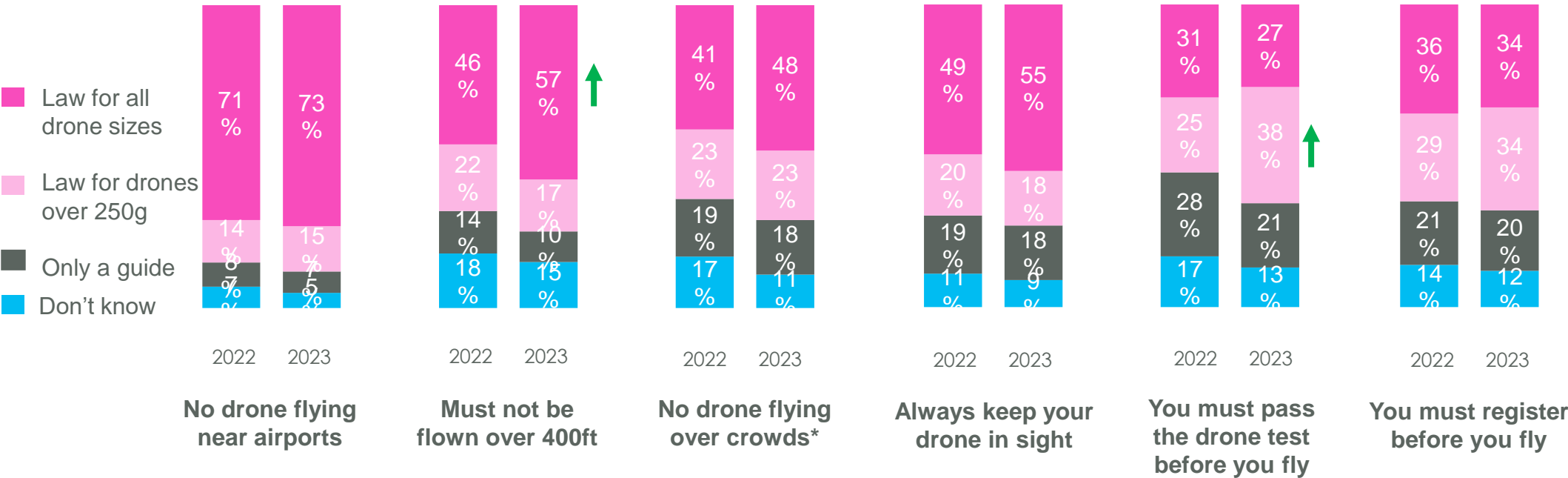
*answer options were updated in 2022

More users understand that height restrictions are legal requirements for all drone sizes, however, more also believe that drone tests are only needed for drones over 250g



DRONE USERS

Drone flying rules – law or guidance?



*answer options were updated in 2022

Awareness of the 400ft (120m) height restriction rule remains consistent amongst the public but has increased amongst drone users



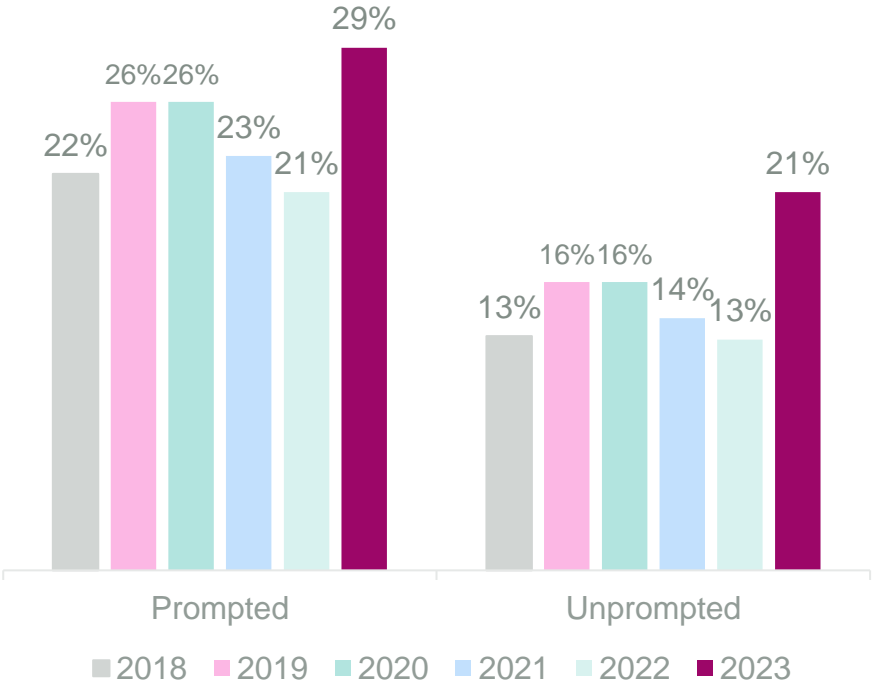
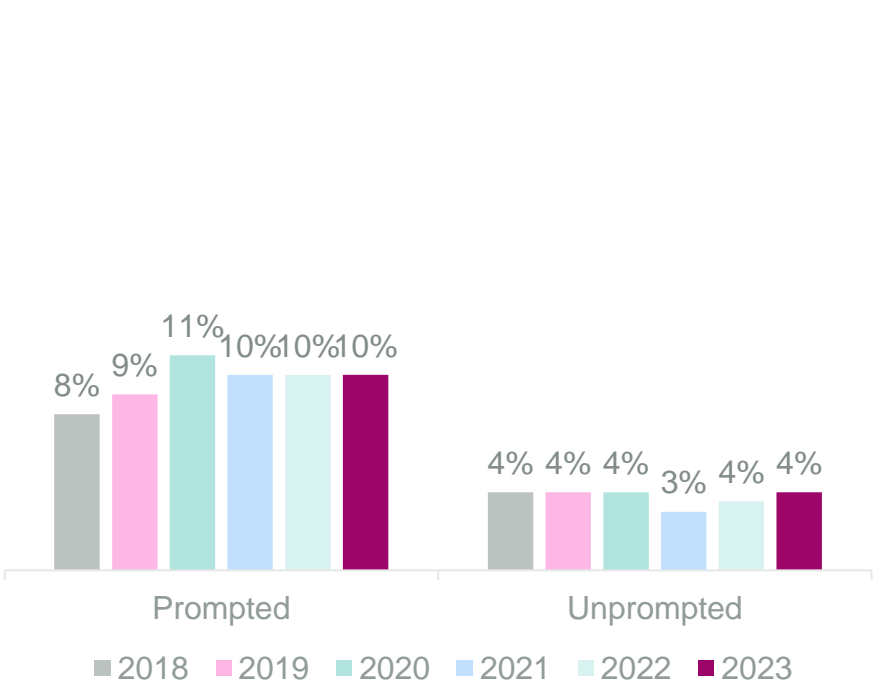
UK PUBLIC

Awareness of 400ft restriction



DRONE USERS

Awareness of 400ft restriction



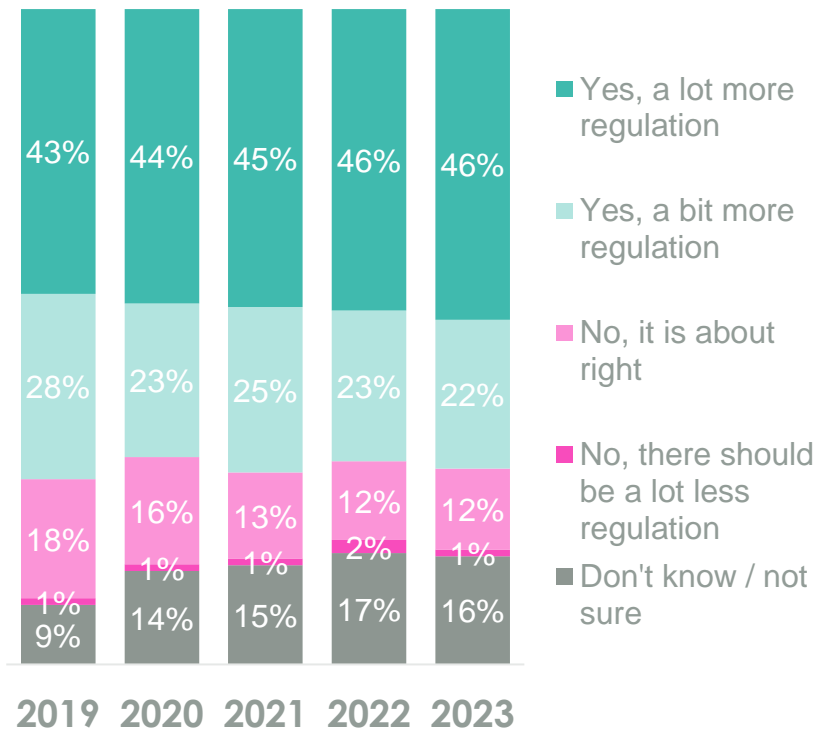
The proportion who believe more regulation on drone usage is required is consistent and still higher amongst the general public

Do you think there needs to be more or less regulation on where and how people can fly drones?



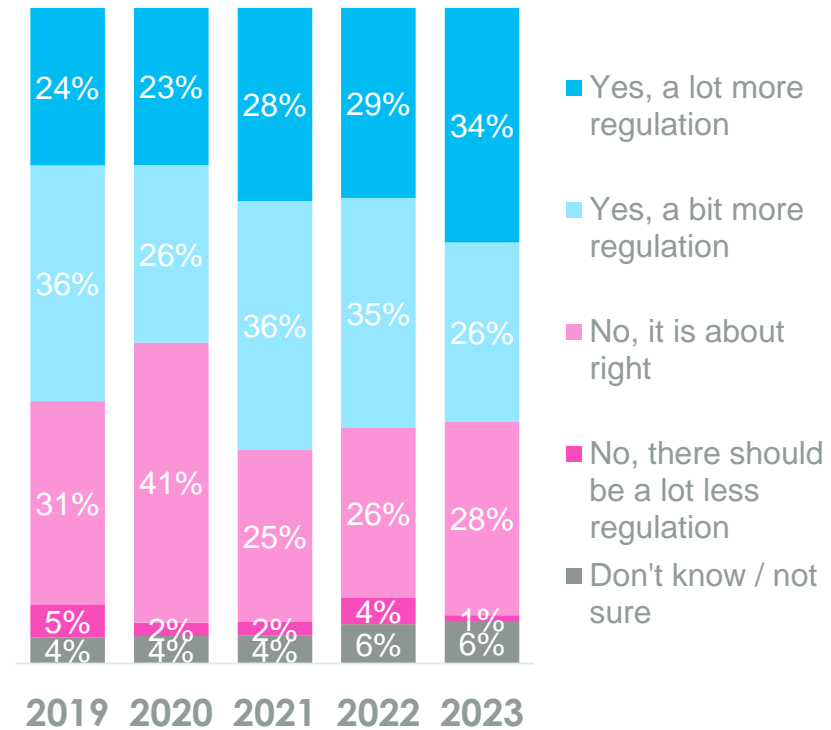
UK PUBLIC

More
68%
(69% 2022)



DRONE USERS

More
60%
(64% 2022)

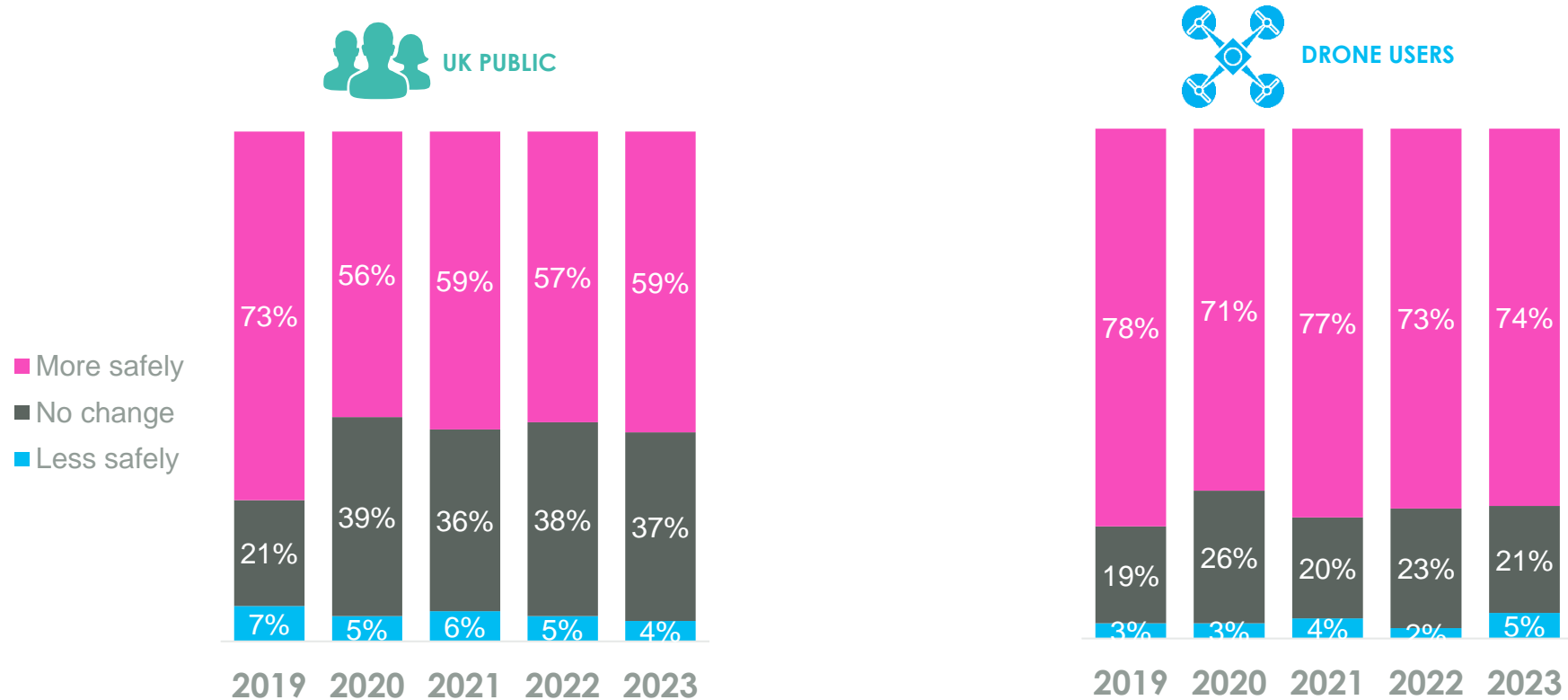


REGISTRATION

Measuring awareness of registration and likely impacts of the requirement

The benefits of registration are recognised amongst both the public and drone users, and remain consistent to 12 months ago

Impact of registration requirement of how safely drones are flown

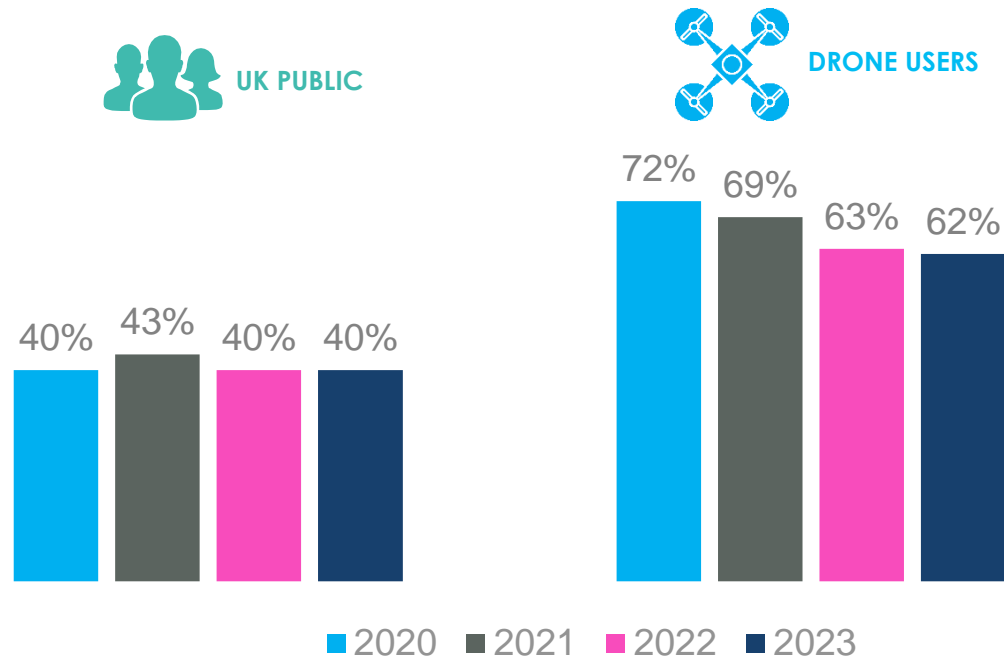


Q29. What impact do you think this compulsory registration has on how drones are flown?

Base: 2019 UK pop (2003) Drone users (506), 2020 UK pop (2003), 2021 UK pop (2001), 2022 UK public (2,000) Drone users (500)

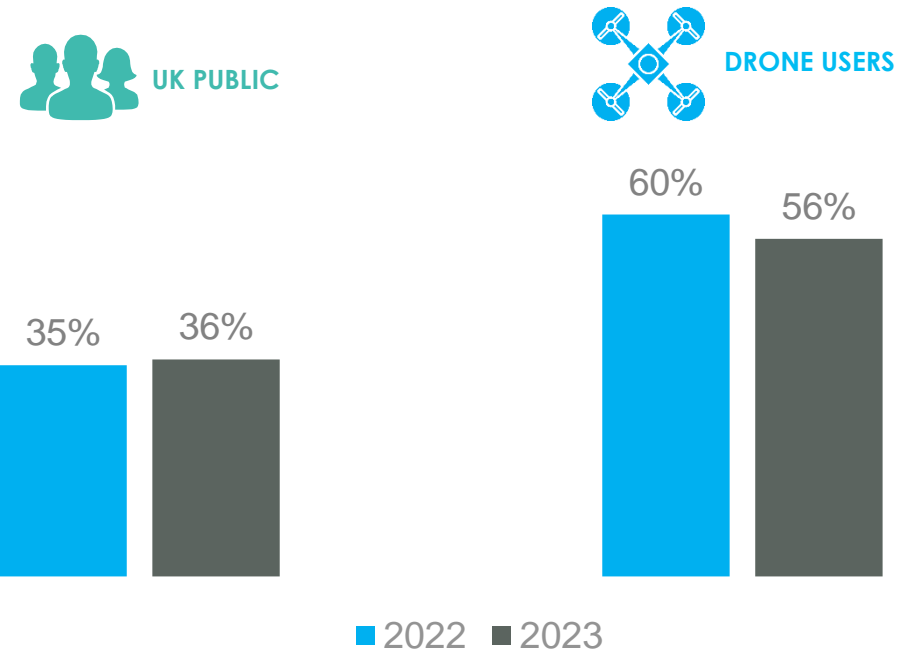
Awareness of registration requirements also remains in line with 12 months ago

Awareness of drone owners being required to register themselves



Only just over half of users are aware that drones under 250g need to be registered with the CAA

Excluding toys, do the operators of drones that weigh under 250g and have a camera need to be registered with the CAA?

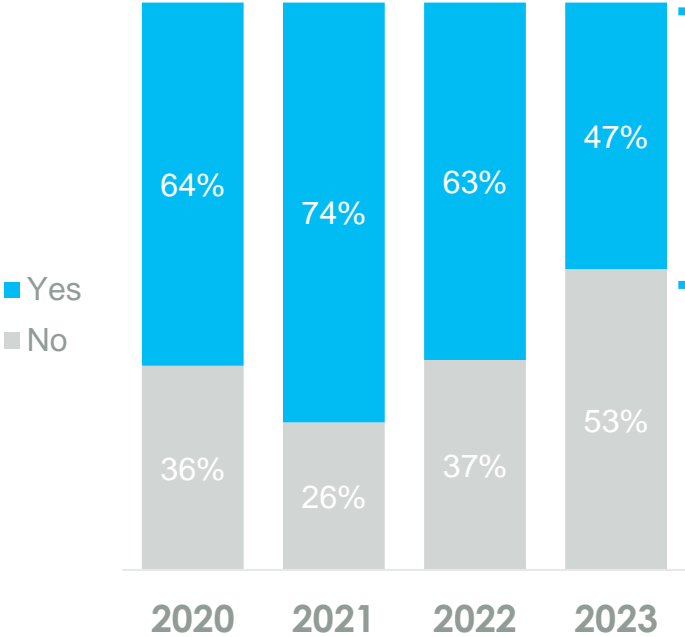


Registration has decreased amongst drone users, and not all of those who have registered have done so in the last 12 months

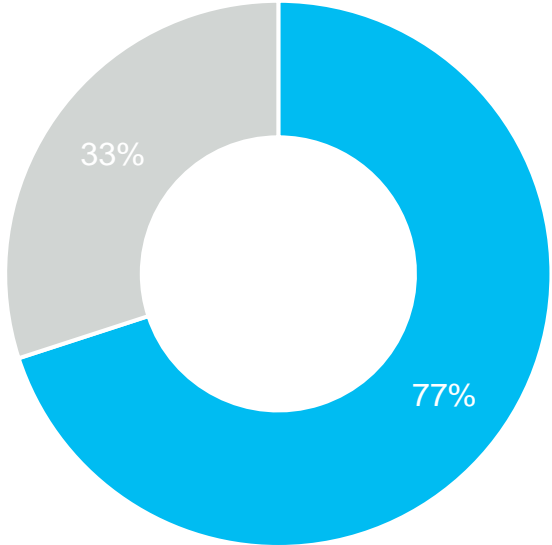


DRONE USERS

Have you registered yourself as a drone user with the CAA?



Registration with the CAA in the last 12 months?



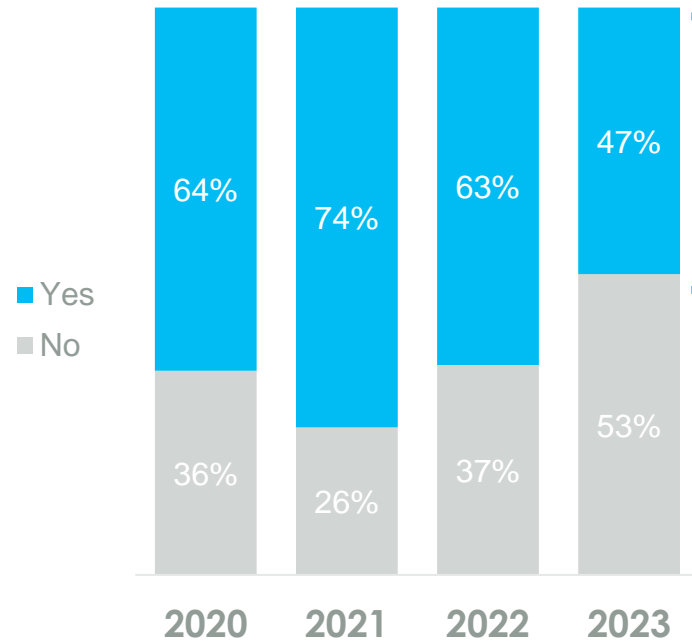
Q27. Have you registered yourself as a drone user with the CAA? 500 drone users
Q27C. Have you registered yourself with the CAA in the last 12 months? Base: 235 registered users

Almost all of those registered intend to register again when it needs renewing

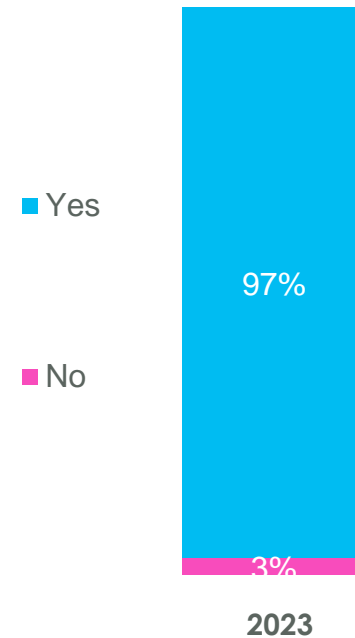


DRONE USERS

Have you registered yourself as a drone user with the CAA?



Likely to renew registration?

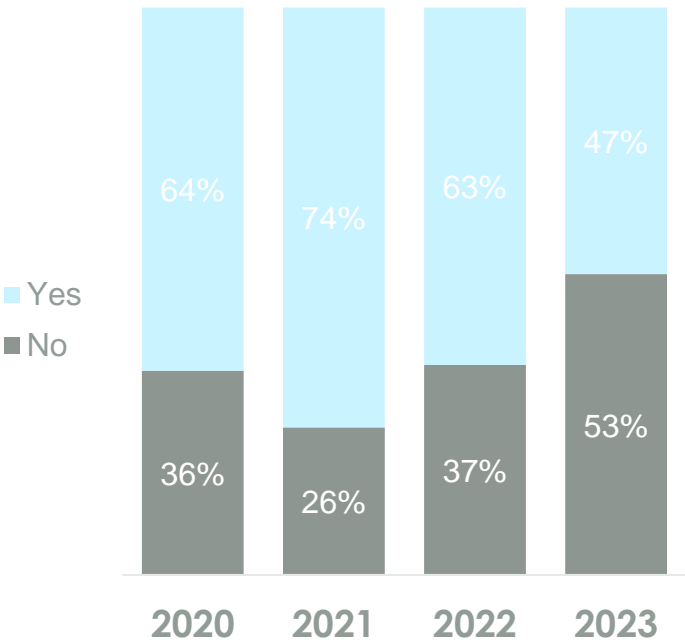


Failure to register is down to being unaware of registration requirements as well as not seeing the benefit of doing so

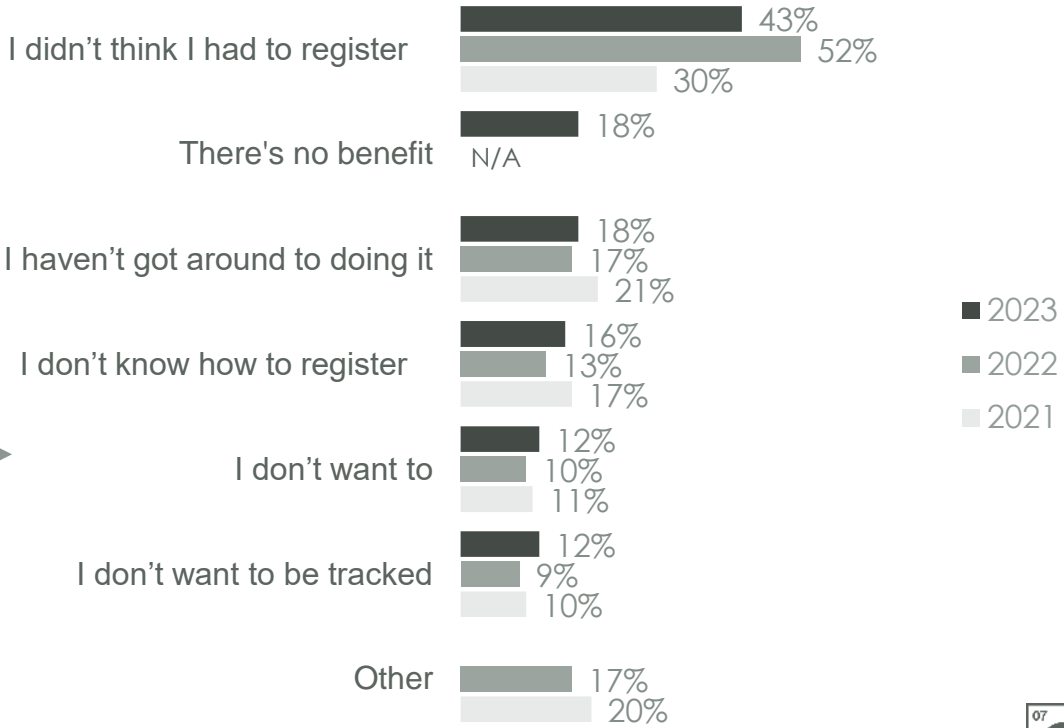


DRONE USERS

Have you registered yourself as a drone user with the CAA?



Reasons for not registering



Q27. Have you registered yourself as a drone user with the CAA? 500 drone users
 Q27B. For what reason have you not registered with the CAA? Base: 265 users who have not registered

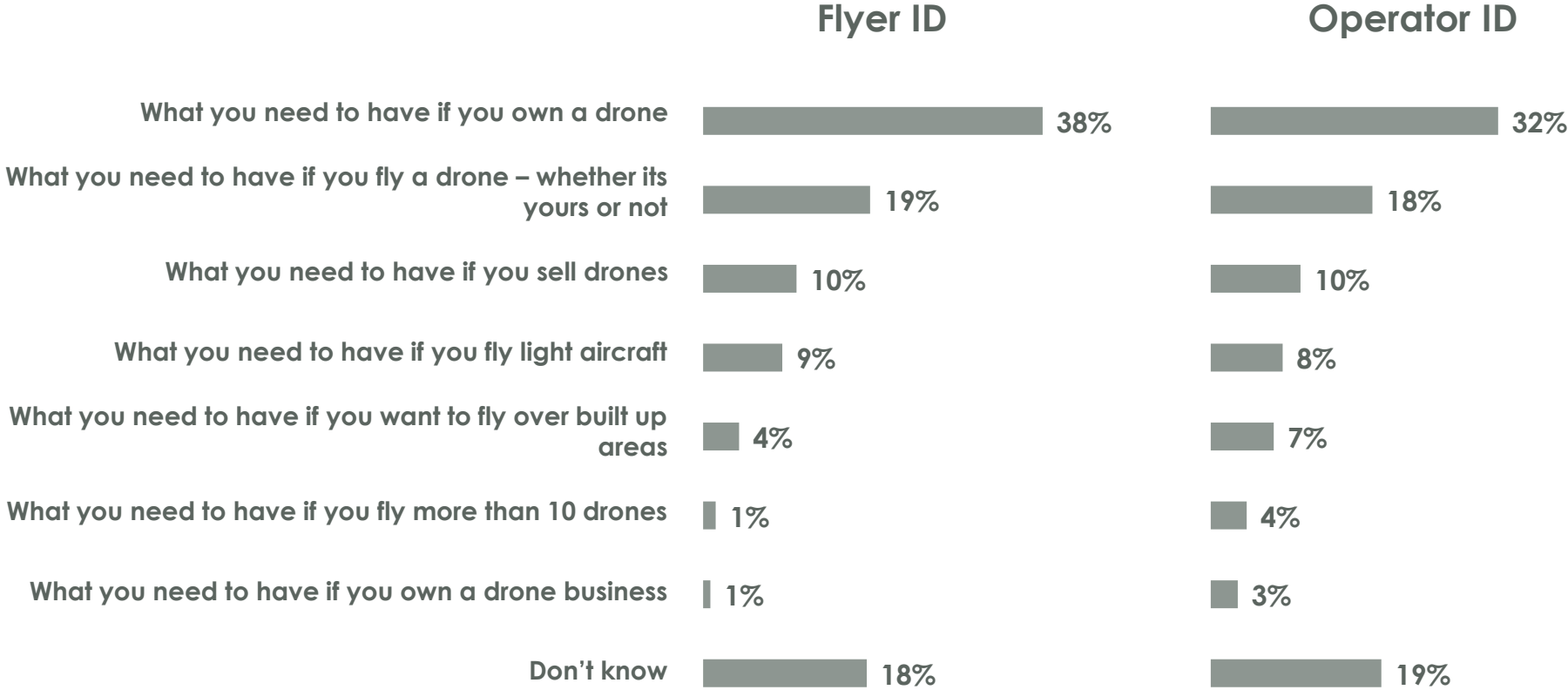


This lack of awareness is also reflected by low awareness of what Flyer IDs and Operator IDs are



DRONE USERS

Understanding of what a Flyer ID and Operator ID are



Users could be motivated to register if the police started issuing fines, but also if they were granted access to fly in more places



Motivations for registering as a drone user (amongst those not currently registered)

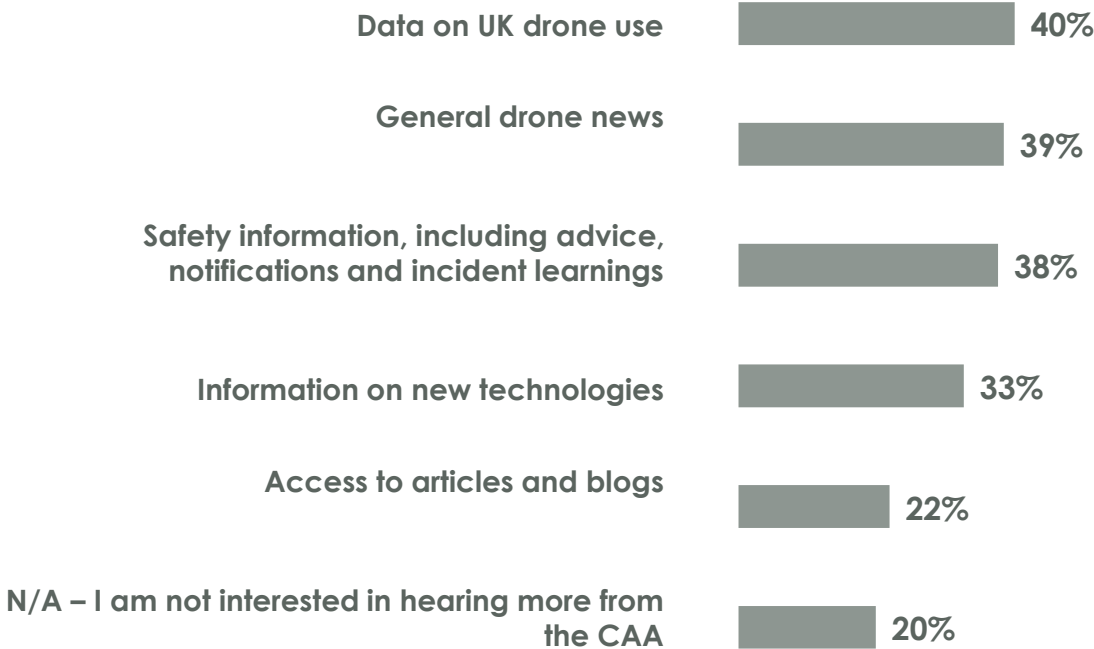


Users would also be interested in hearing about general drone news and user data



DRONE USERS

Interest in hearing more from the CAA



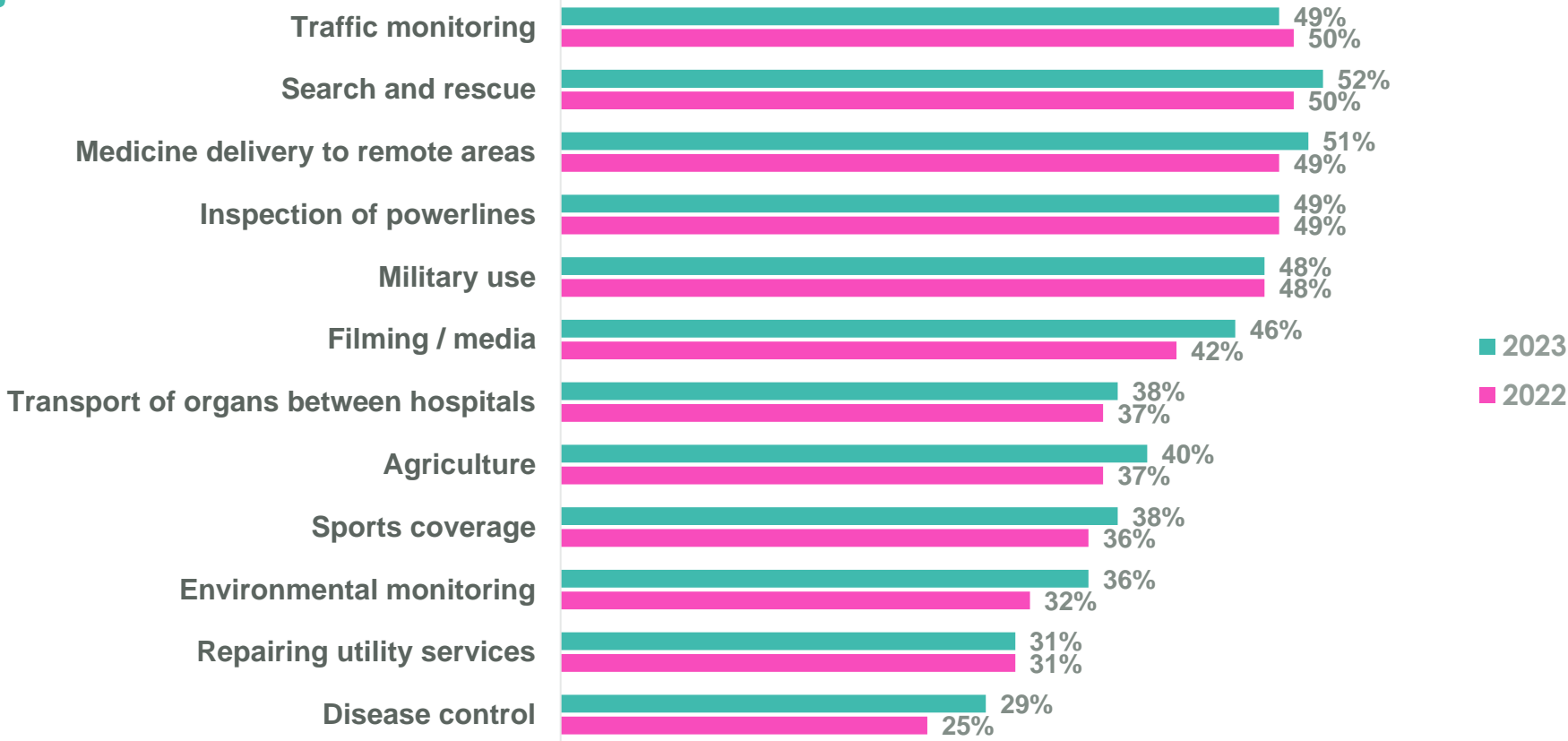
INNOVATION

What are the future uses and services of drones?

There is no real change in expectations for drones in the next 5 years from the general public – accessing hard to reach areas is the priority



Expected drone uses in 5 years time



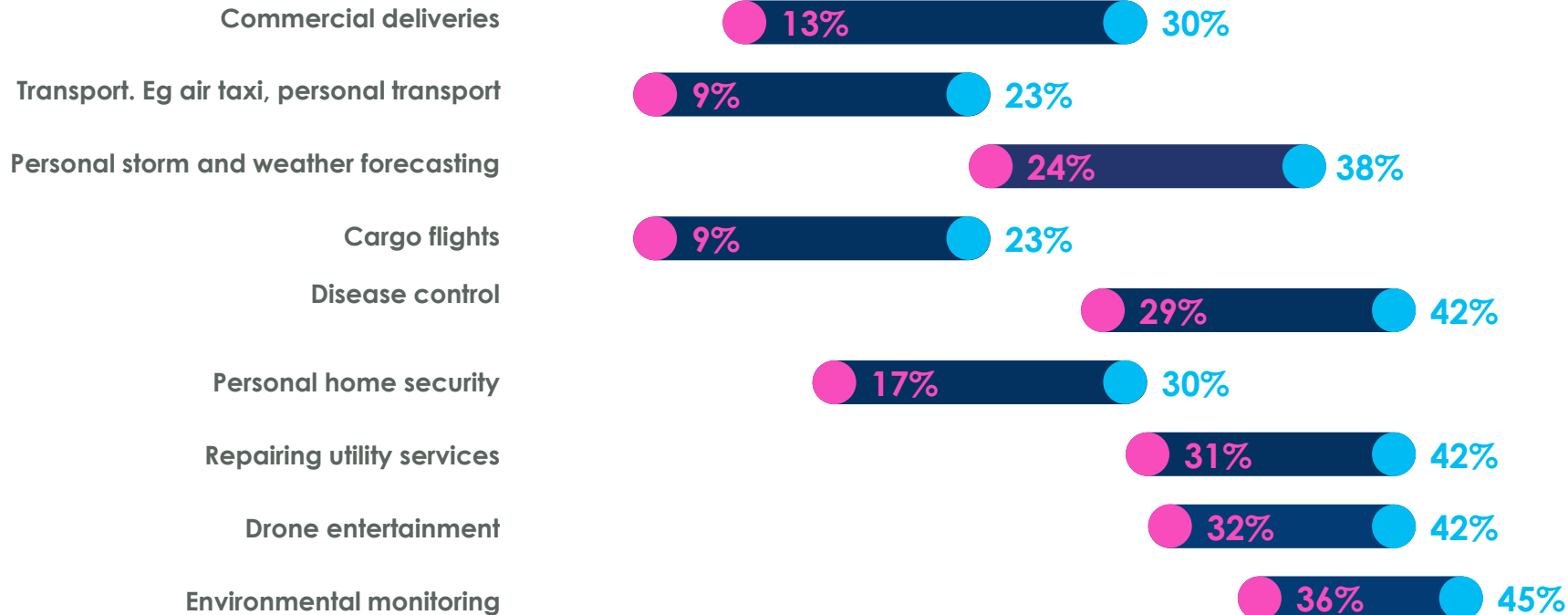
The public expect the biggest increases in drone usage to be around deliveries, transport and weather forecasting over the next 10 years



UK PUBLIC

Services expected to grow the most in next 10 years

● 5 years time
● 10 years time



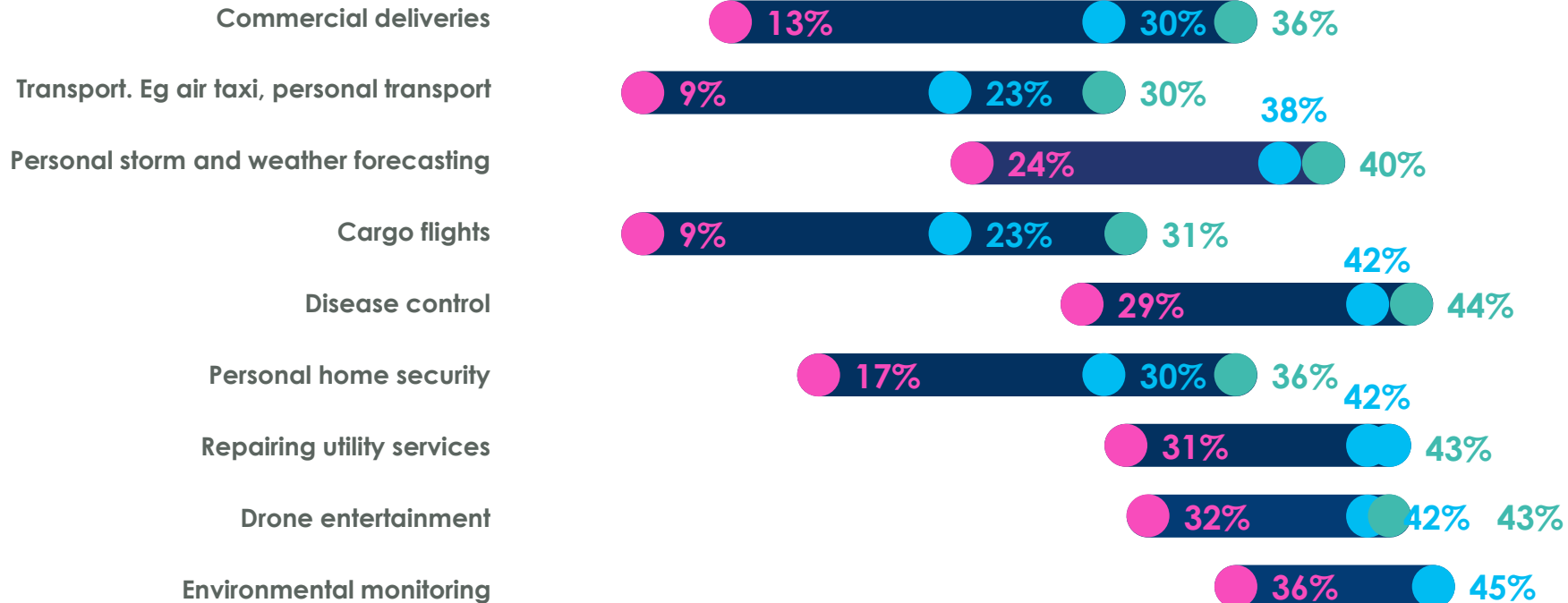
Deliveries and transport are expected to become even more popular over the next 20 years



UK PUBLIC

Services expected to grow the most in next 10 years

- 5 years time
- 10 years time
- 20 years time



Thank you
For any queries contact:

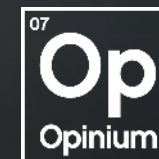


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What people think,
feel and do