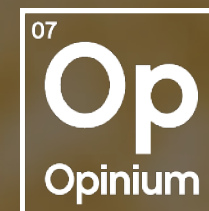




CAA
Drone Awareness Tracker

May 2024



What people think,
feel and do

Objectives of the study

This is the ninth 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



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

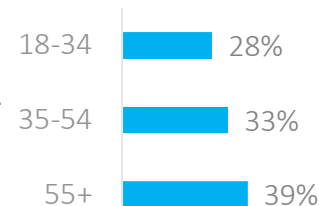
2,000 adults aged 18+ representative of the UK
15 minute online interview

Breakdown

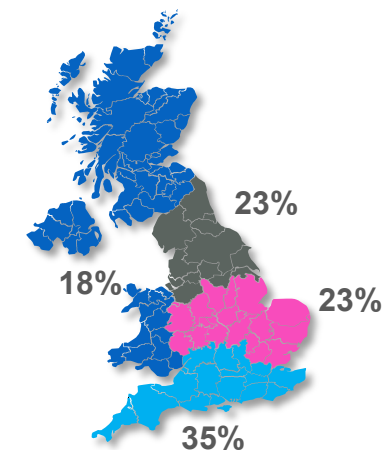


52% 48%

Male	Female
52%	48%



18-34	35-54	55+
28%	33%	39%



South	Midlands	North	Scotland / Wales / Ireland
35%	23%	23%	18%

Drone users



Sample



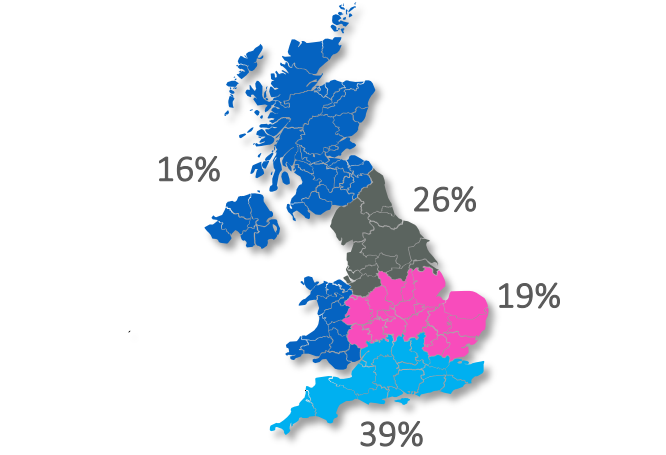
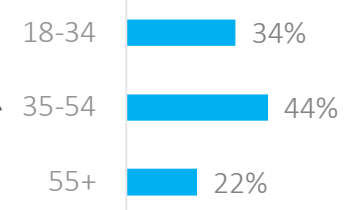
Drone User sample

Sample

Breakdown

2

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



Male 62%
Female 38%

18-34 34%
35-54 44%
55+ 22%

South 39%
Midlands 19%
North 26%
Scotland / Wales / Ireland 16%

% who fly weekly

40%

Years experience using a drone

2.4 years

Reason for flying a drone

For fun 83%
Photography 53%
For work 11%

↑ ↓ Significant shift vs previous wave



Executive summary

- 1** Public understanding of drone flying rules has remained steady, though there are uncertainties regarding most regulations. Airport restrictions are an exception, which is widely recognised.
- 2** Awareness of the 400ft (120m) height restriction remains very low amongst the general public at 4% unprompted, and perhaps worryingly only one in five drone users are also aware of it. There is clear support for more regulations on drone usage, despite a slight decrease among the general public since last year.
- 3** There are mixed views about relaxing the requirement to keep the drone within sight of the operator for certain circumstances, such as, rail repair and windfarm monitoring. A higher proportion of drone users support this idea; however, primary concerns are issues around safety, privacy and misuse/abuse.
- 4** Knowledge about the requirement to register remains stable, though one in five operators have not registered in the past year, with the main reason being unaware of registration requirements. Despite this, most registered operators intend to re-register. Enforcement through fines or expanded flying permissions could motivate registration and the £100 on the spot fine is considered fair by the majority.
- 5** There is no significant change in public expectations for drone advancements over the next five years. However, over the next 10 to 20 years, the public anticipates significant growth in drone deliveries, transport, and weather forecasting, with increasing positivity towards piloted drone taxis. Additionally, the public and drone users largely support using light displays instead of fireworks to mitigate environmental impact.

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

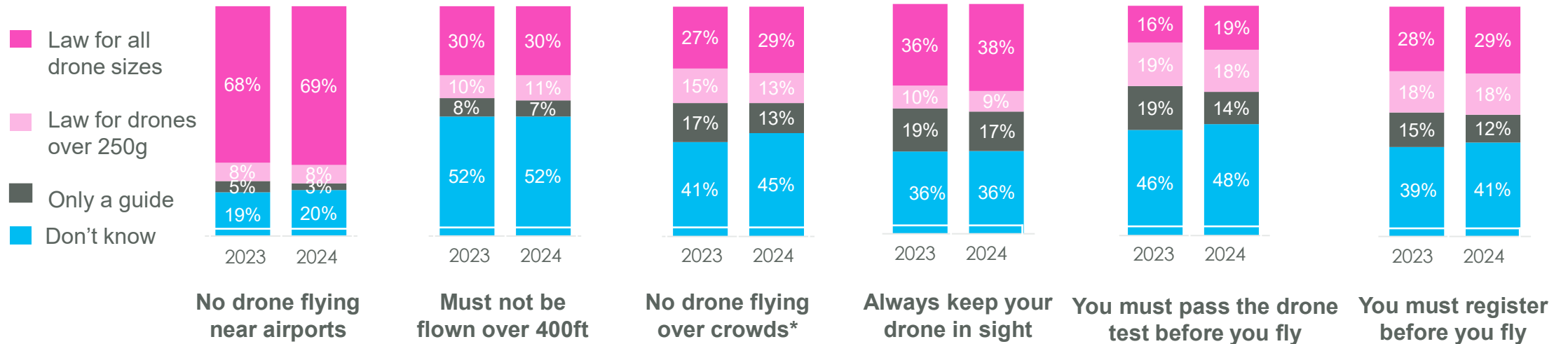
Measuring awareness of drone flying rules

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



Drone flying rules – law or guidance?

*answer options were updated in 2022



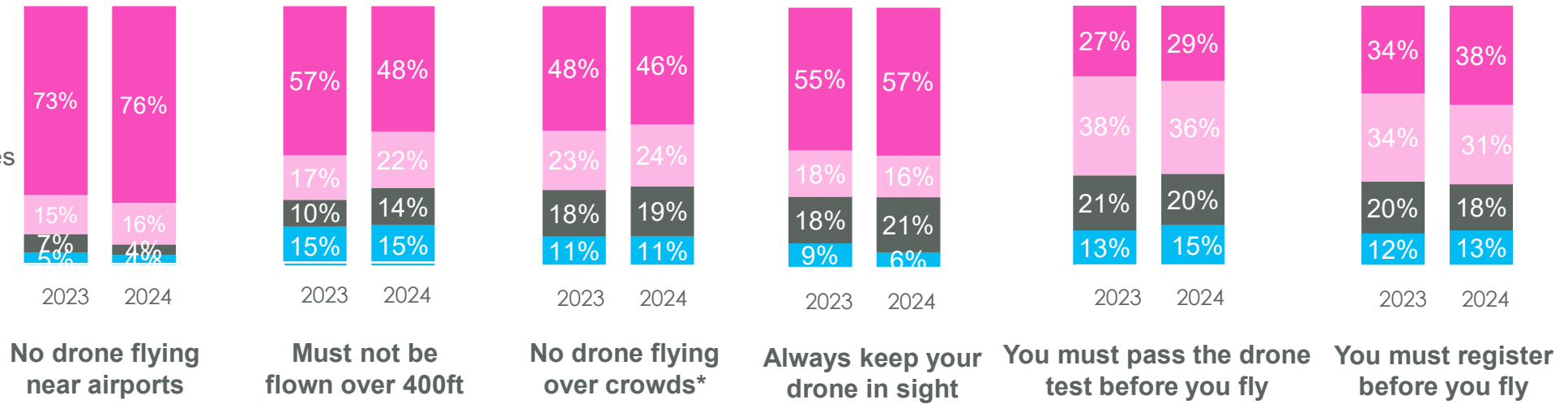
Drone flying rules	Law for all drone sizes		Law for drones over 250g		Only a guide		Don't know	
	2023	2024	2023	2024	2023	2024	2023	2024
No drone flying near airports	68%	69%	8%	8%	5%	3%	19%	20%
Must not be flown over 400ft	30%	30%	10%	11%	8%	7%	52%	52%
No drone flying over crowds	27%	29%	15%	13%	17%	13%	41%	45%
Always keep your drone in sight	36%	38%	10%	9%	19%	17%	36%	36%
You must pass the drone test	16%	19%	19%	18%	19%	14%	46%	48%
You must register before you fly	28%	29%	18%	18%	15%	12%	39%	41%

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



DRONE USERS

- Law for all drone sizes
- Law for drones over 250g
- Only a guide
- Don't know



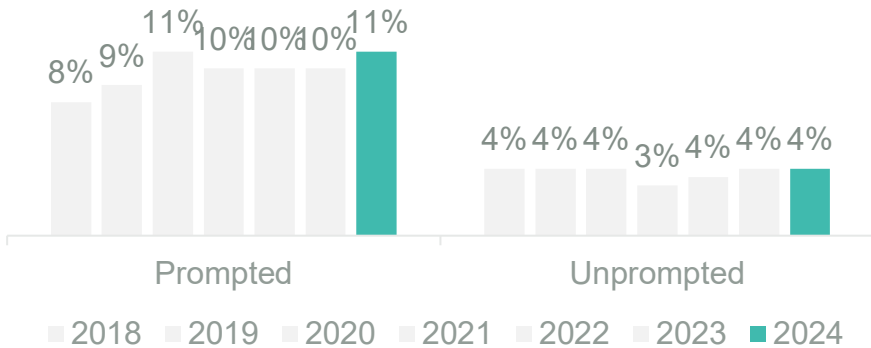
*answer options were updated in 2022

Drone flying rules	Law for all drone sizes		Law for drones over 250g		Only a guide		Don't know	
	2023	2024	2023	2024	2023	2024	2023	2024
No drone flying near airports	73%	76%	15%	16%	7%	4%	5%	4%
Must not be flown over 400ft	57%	48%	17%	22%	10%	14%	15%	15%
No drone flying over crowds	48%	46%	23%	24%	18%	19%	11%	11%
Always keep your drone in sight	55%	57%	18%	16%	18%	21%	9%	6%
You must pass the drone test	27%	29%	38%	36%	21%	20%	13%	15%
You must register before you fly	34%	38%	34%	31%	20%	18%	12%	13%

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



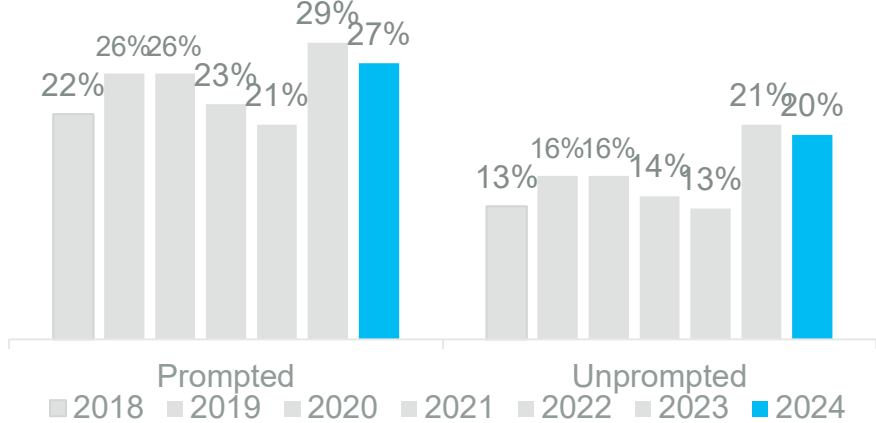
Awareness of 400ft restriction



Awareness of 400ft Restriction	2018	2019	2020	2021	2022	2023	2024
Prompted	8%	9%	11%	10%	10%	10%	11%
Unprompted	4%	4%	4%	3%	4%	4%	4%



Awareness of 400ft restriction



Awareness of 400ft Restriction	2018	2019	2020	2021	2022	2023	2024
Prompted	22%	26%	26%	23%	21%	29%	27%
Unprompted	13%	16%	16%	14%	13%	21%	20%

Q8. Up to what distance in height from the ground do you think you are permitted to fly a drone?; Q9. Which of the following distances in height from the ground do you think you are permitted to fly a drone? Up to a maximum height of...
 Base: UK public (1990); Drone users (500)



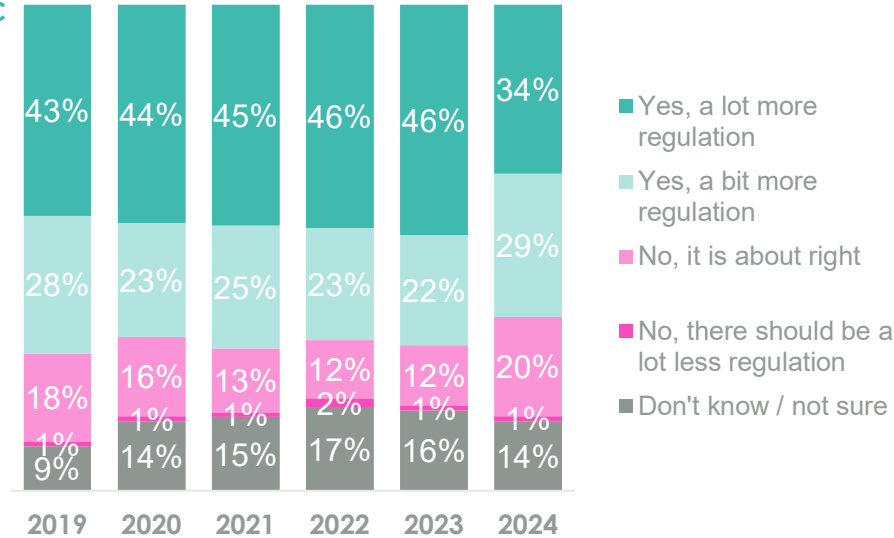
Both the general public and drone users agree that there should be more regulation on how people can fly drones, although this has slightly decreased amongst the public



UK PUBLIC

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

More
63%
(68% 2023)

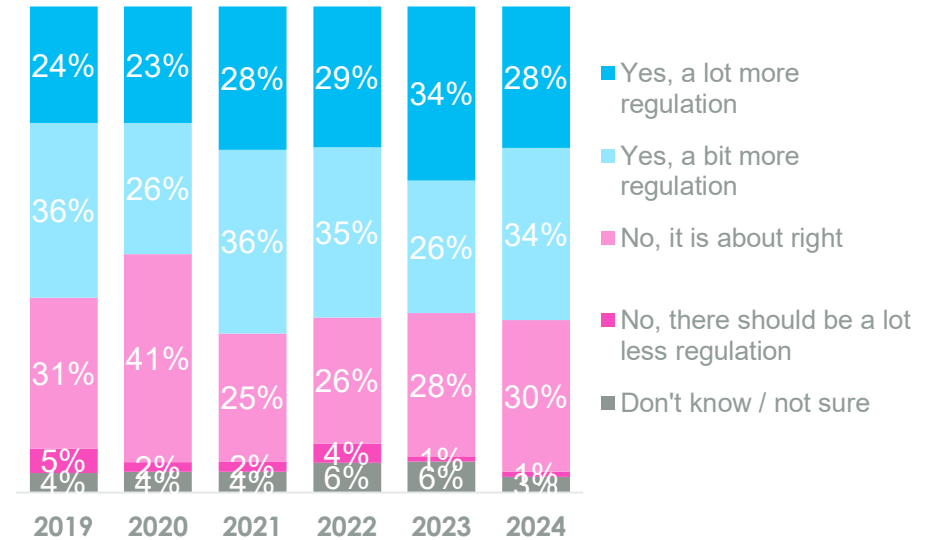


Year	Yes, a lot more regulation	Yes, a bit more regulation	No, it is about right	No, there should be a lot less regulation	Don't know / not sure
2019	43%	28%	18%	1%	9%
2020	44%	23%	16%	1%	14%
2021	45%	25%	13%	1%	15%
2022	46%	23%	12%	2%	17%
2023	46%	22%	12%	1%	16%
2024	34%	29%	20%	1%	14%



DRONE USERS

More
62%
(60% 2023)

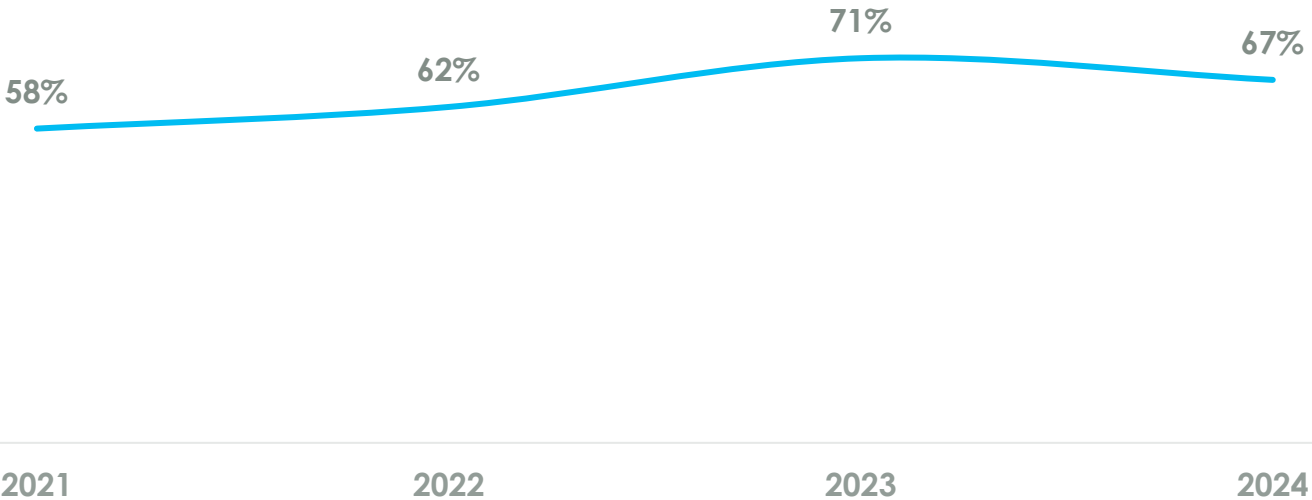


Year	Yes, a lot more regulation	Yes, a bit more regulation	No, it is about right	No, there should be a lot less regulation	Don't know / not sure
2019	24%	36%	31%	5%	4%
2020	23%	26%	41%	2%	4%
2021	28%	36%	25%	2%	4%
2022	29%	35%	26%	4%	6%
2023	34%	26%	28%	1%	6%
2024	28%	34%	30%	1%	3%

There has been an upward trend of confidence that users can abide by drone flying rules, however, it has levelled off this year



% who are confident they can abide by drone flying rules when flying a drone

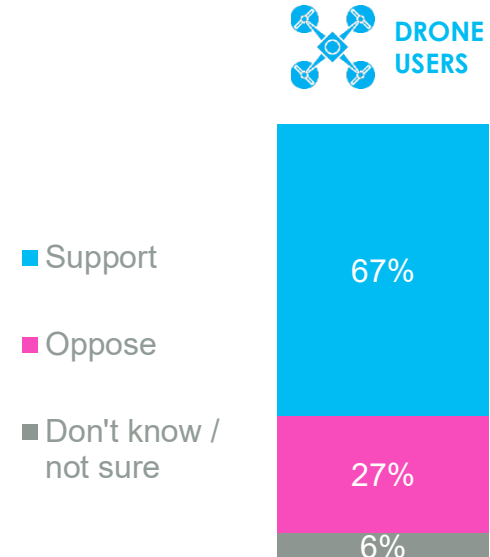
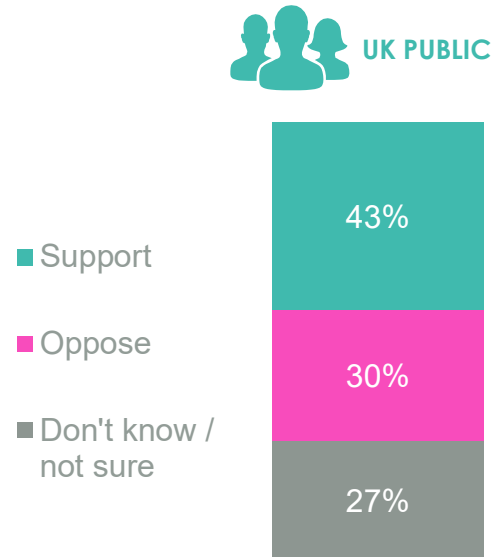


Year	% who are confident they can abide by drone flying rules when flying a drone
2021	58%
2022	62%
2023	71%
2024	67%



A higher proportion of drone users support the proposal of relaxing the requirement that drones need to be kept within sight, but only for certain circumstances such as monitoring wind farms and railways

% who support the relaxation of rules for certain circumstances



% who are confident they can abide by drone flying rules when flying a drone

Support	43%
Oppose	30%
Don't know / not sure	27%

% who are confident they can abide by drone flying rules when flying a drone

Support	67%
Oppose	27%
Don't know / not sure	6%

Q41. Currently, it is a legal requirement for a drone operator to keep their drone within sight at all times when flying it. How would you feel about there being certain circumstances where this rule didn't apply, such as when drones are needed to monitor wind farms, railway tracks or perimeters of estates?

Base: UK public (1999); Drone users (500)

The primary concerns revolve around safety, privacy, and the potential for misuse, with strong support for keeping or even tightening current regulations on drone operations

Safety Concerns

Maintaining visual contact is essential for control and accountability to prevent accidents

Lack of sight increases the likelihood of misuse, leading to irresponsible behaviour and potential harm

Drones can be dangerous if they fall or crash, potentially injuring people or damaging property

There is a risk of interference with aircraft, helicopters, and emergency services

Stricter control ensures public safety and reduces the risk of drones becoming a hazard.

Privacy Issues

There is a fear of misuse for surveillance or other intrusive activities as drones can invade personal privacy, peeping into homes and private spaces

Relaxation of rules could lead to increased spying and lack of privacy

Misuse and Abuse

Drones are prone to being abused for criminal activities and a relaxation of rules could increase this

Allowing out-of-sight operation opens up possibilities for dodging regulations and irresponsible use

Relaxing rules could lead to broader, uncontrolled use, making enforcement difficult

Q42. For what reason would you not support a relaxation of the rules?

Base: Oppose relaxation of distance rules (644)

REGISTRATION

Measuring awareness of registration and likely impacts of the requirement

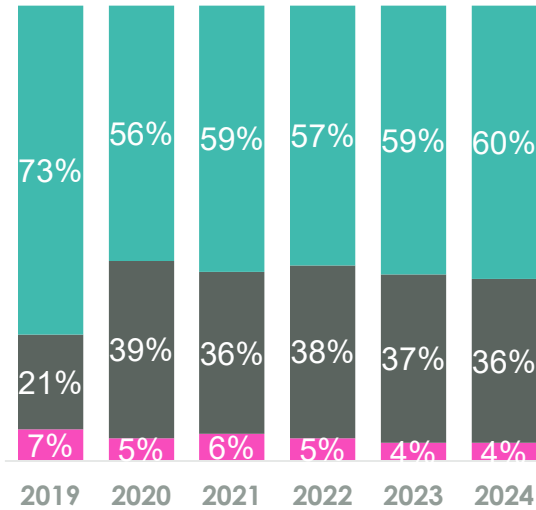
The benefits of registration are recognised amongst both the public and drone operators, and remain consistent to 12 months ago

Impact of registration requirement of how safely drones are flown



UK PUBLIC

- More safely
- No change
- Less safely

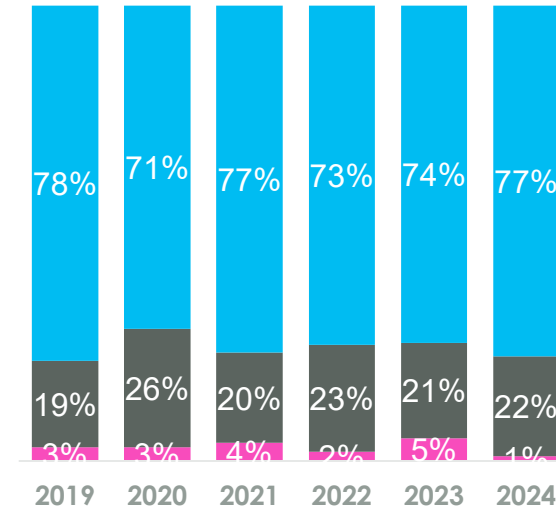


Year	Less safely	No change	More safely
2019	7%	21%	73%
2020	5%	39%	56%
2021	6%	36%	59%
2022	5%	38%	57%
2023	4%	37%	59%
2024	4%	36%	60%



DRONE USERS

- More safely
- No change
- Less safely



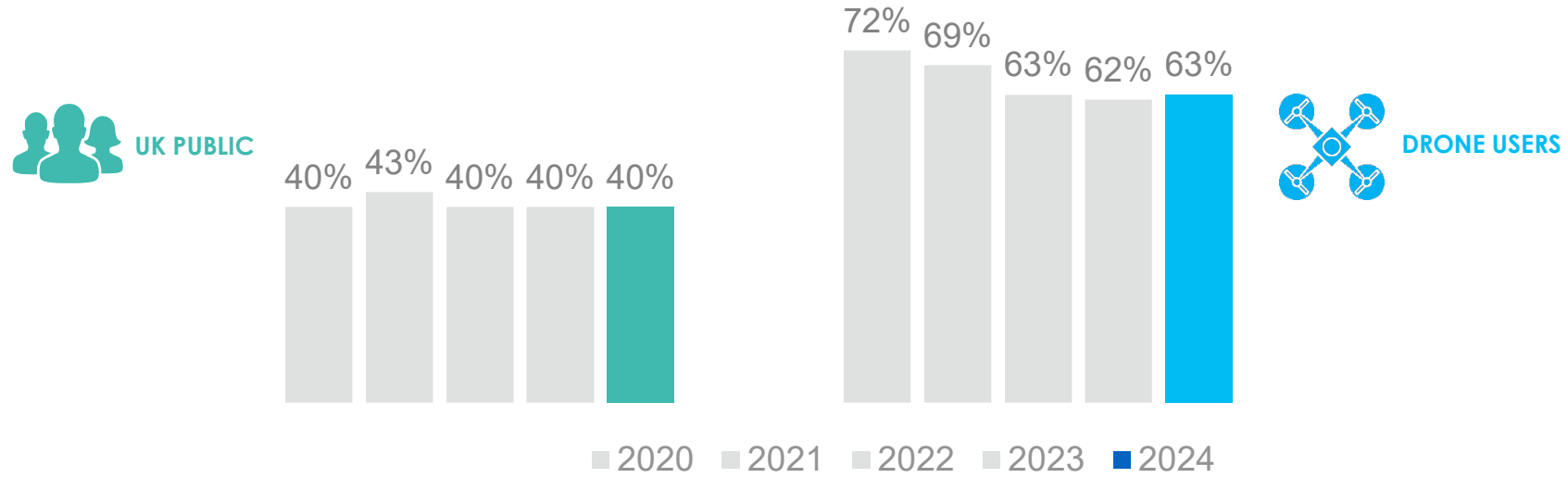
Year	Less safely	No change	More safely
2019	3%	19%	78%
2020	3%	26%	71%
2021	4%	20%	77%
2022	2%	23%	73%
2023	5%	21%	74%
2024	1%	22%	77%

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); 2024 UK public (1990) Drone users (500)

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

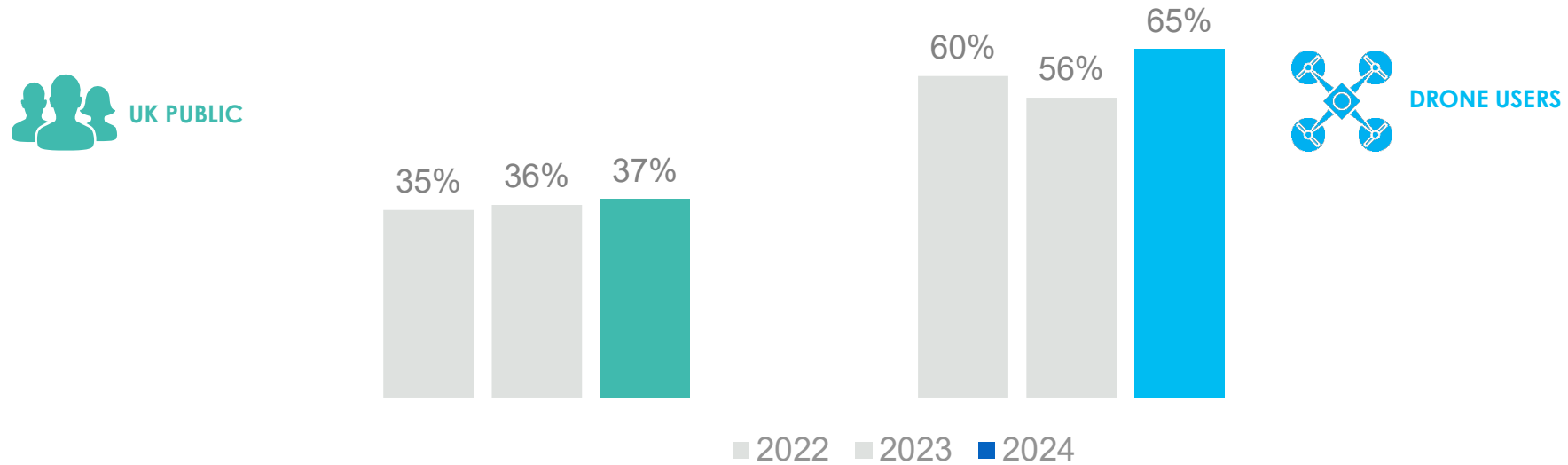
Awareness of drone operators being required to register themselves



Year	UK Public	Drone Users
2020	40%	72%
2021	43%	69%
2022	40%	63%
2023	40%	62%
2024	40%	63%

Awareness that operators of drones under 250g need to be registered with the CAA has increased amongst the public users

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



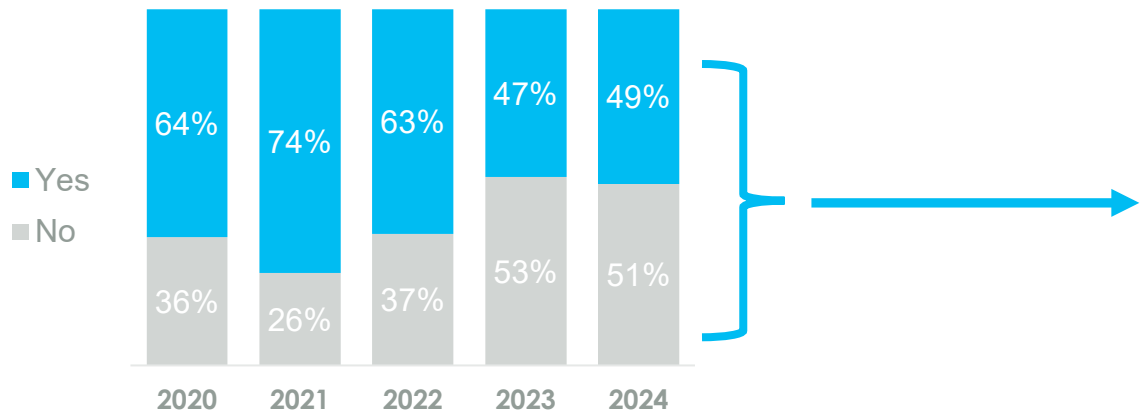
Year	UK Public	Drone Users
2022	35%	60%
2023	36%	56%
2024	37%	65%

Registration has remained stable amongst drone operators, but one in five haven't done so in the last 12 months, showing a lack of awareness of the registration requirements



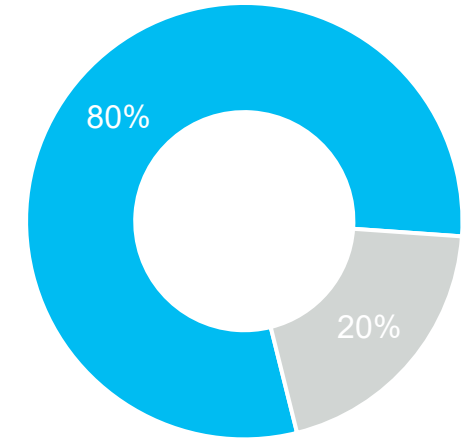
DRONE USERS

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



Year	Yes	No
2020	64%	36%
2021	74%	26%
2022	63%	37%
2023	47%	53%
2024	49%	51%

Registration with the CAA in the last 12 months?



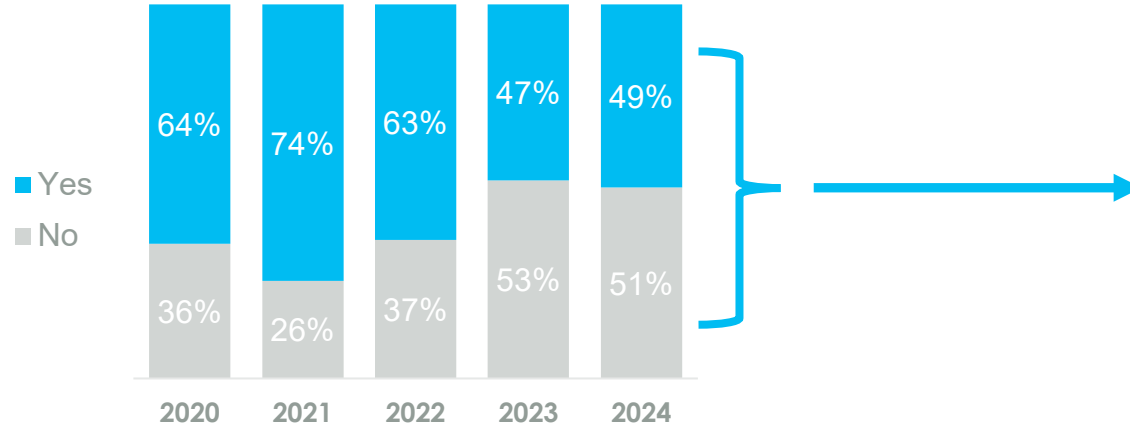
Yes	No
80%	20%

Despite this, almost all of those registered intend to register again



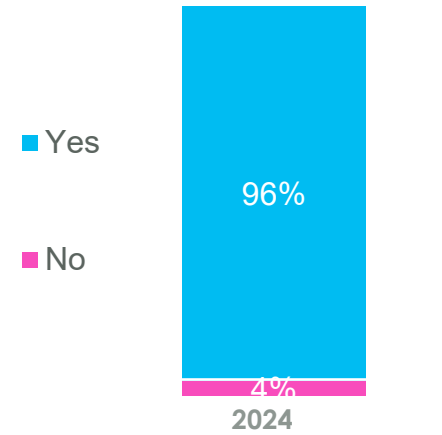
DRONE USERS

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



Year	Yes	No
2020	64%	36%
2021	74%	26%
2022	63%	37%
2023	47%	53%
2024	49%	51%

Likely to renew registration?



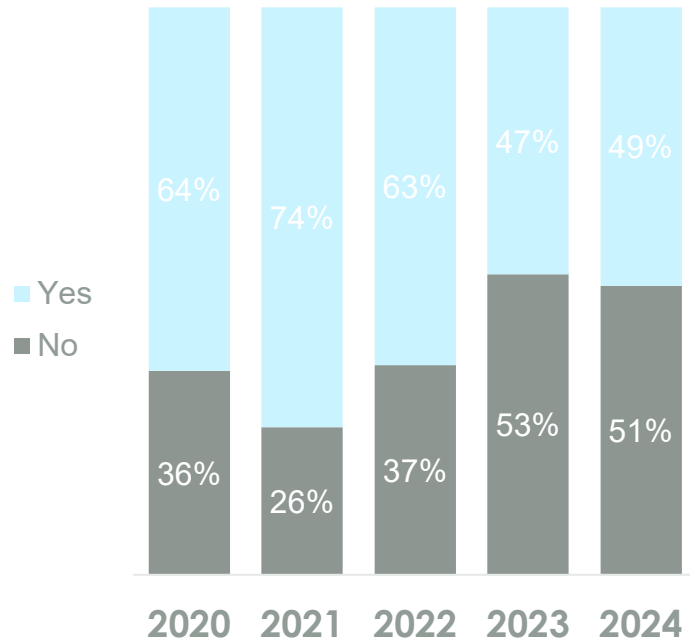
Response	Percentage
Yes	96%
No	4%

Q27A. Have you registered yourself as a drone user with the CAA? Base: 500 drone users
 Q30A. Do you intend to renew your registration when it expires? Base: 245 registered users



Failure to register is still down to being unaware of registration requirements

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



Reasons for not registering



DRONE USERS

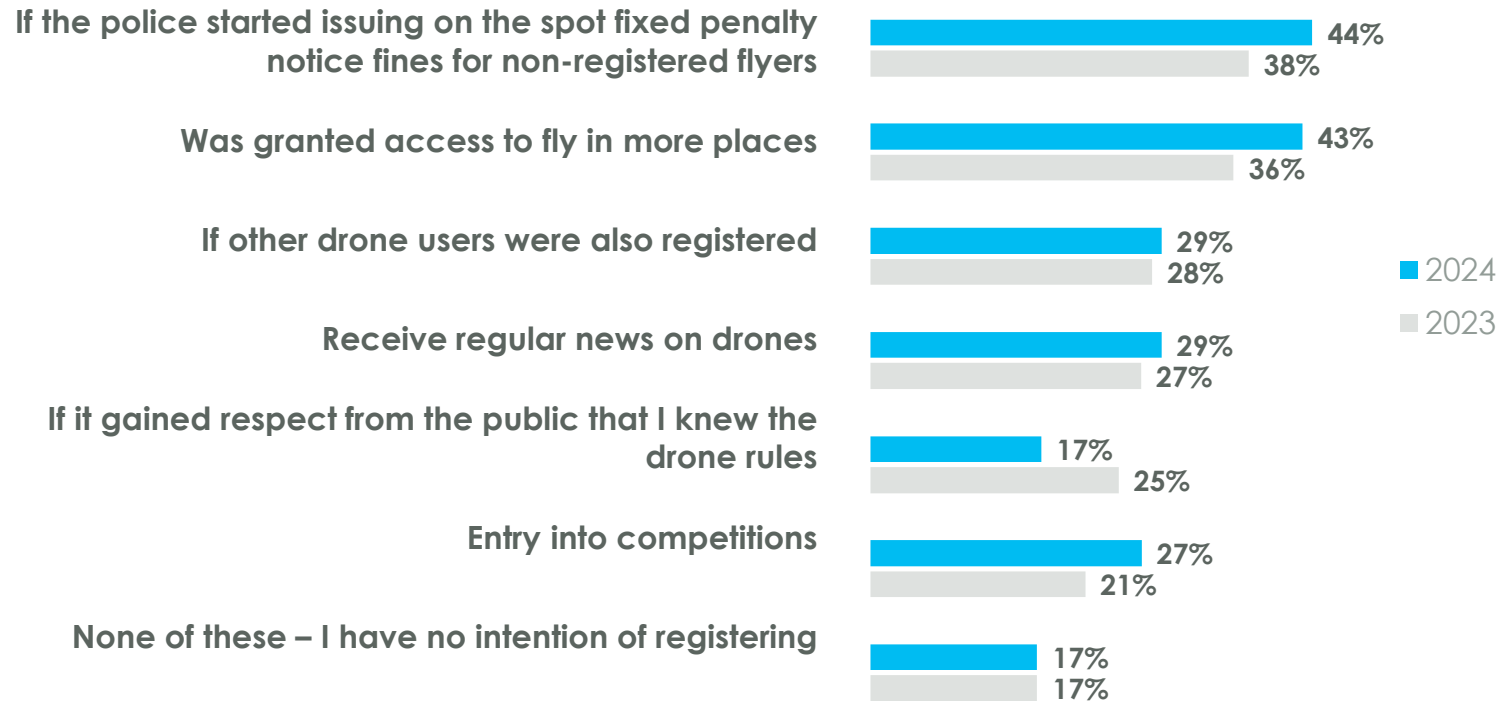


Year	I didn't think I had to register it	I haven't got around to doing it	I don't know how to register it	There's no benefit	I don't want to be tracked	I don't want to	Other
2024	45%	19%	19%	11%	8%	7%	12%
2023	43%	18%	16%	18%	12%	12%	0%
2022	52%	17%	13%	0%	9%	10%	17%
2021	30%	21%	17%	0%	10%	11%	20%

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 operator (amongst those not currently registered)

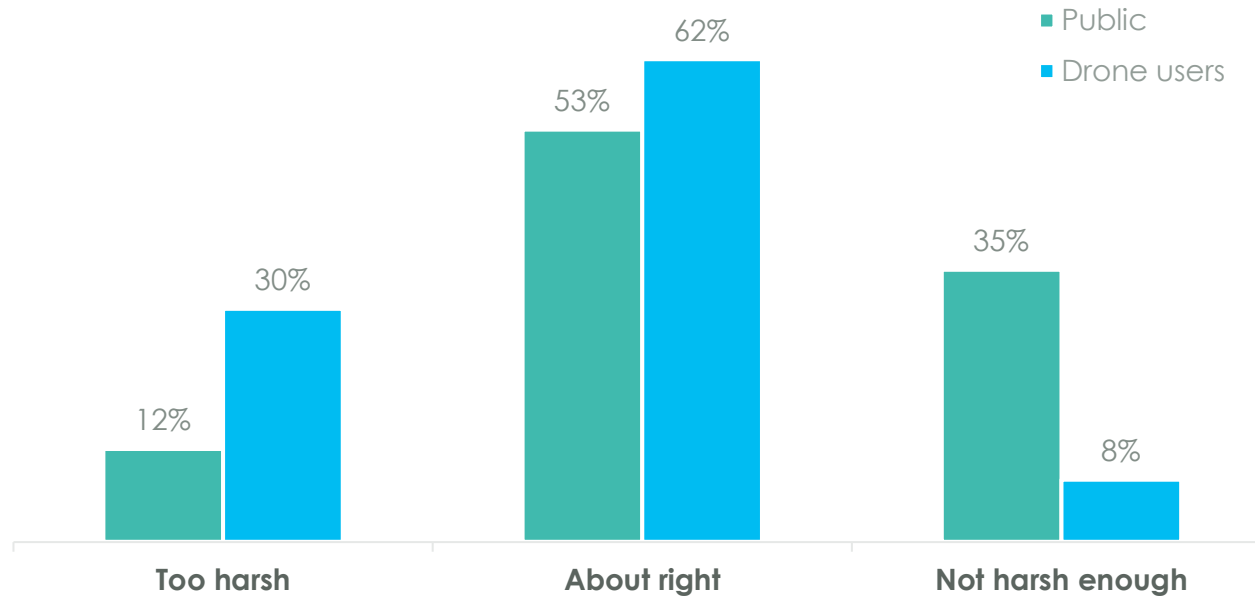
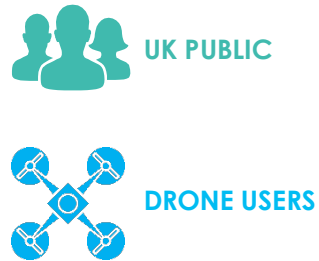


Motivations for registering as a drone operator (amongst those not currently registered)

	2024	2023
If the police started issuing on the spot fixed penalty notice fines for non-registered flyers	44%	38%
Was granted access to fly in more places	43%	36%
If other drone users were also registered	29%	28%
Receive regular news on drones	29%	27%
If it gained respect from the public that I knew the drone rules	17%	25%
Entry into competitions	27%	21%
None of these – I have no intention of registering	17%	17%

The majority agree that £100 fine is a fair punishment for not registering with the CAA, however, some drone operators feel this is too harsh

Attitude towards a £100 on the spot fine for using a drone without being registered



Attitude towards a £100 on the spot fine for using a drone without being registered

	UK Public	Drone users
Too harsh	12%	30%
About right	53%	62%
Not harsh enough	35%	8%

Q44. Is an on-the-spot £100 fine a fair punishment for drone users who are not registered with the CAA or haven't passed the Flyer ID test?
 Base: UK public (1990); Drone users (500)

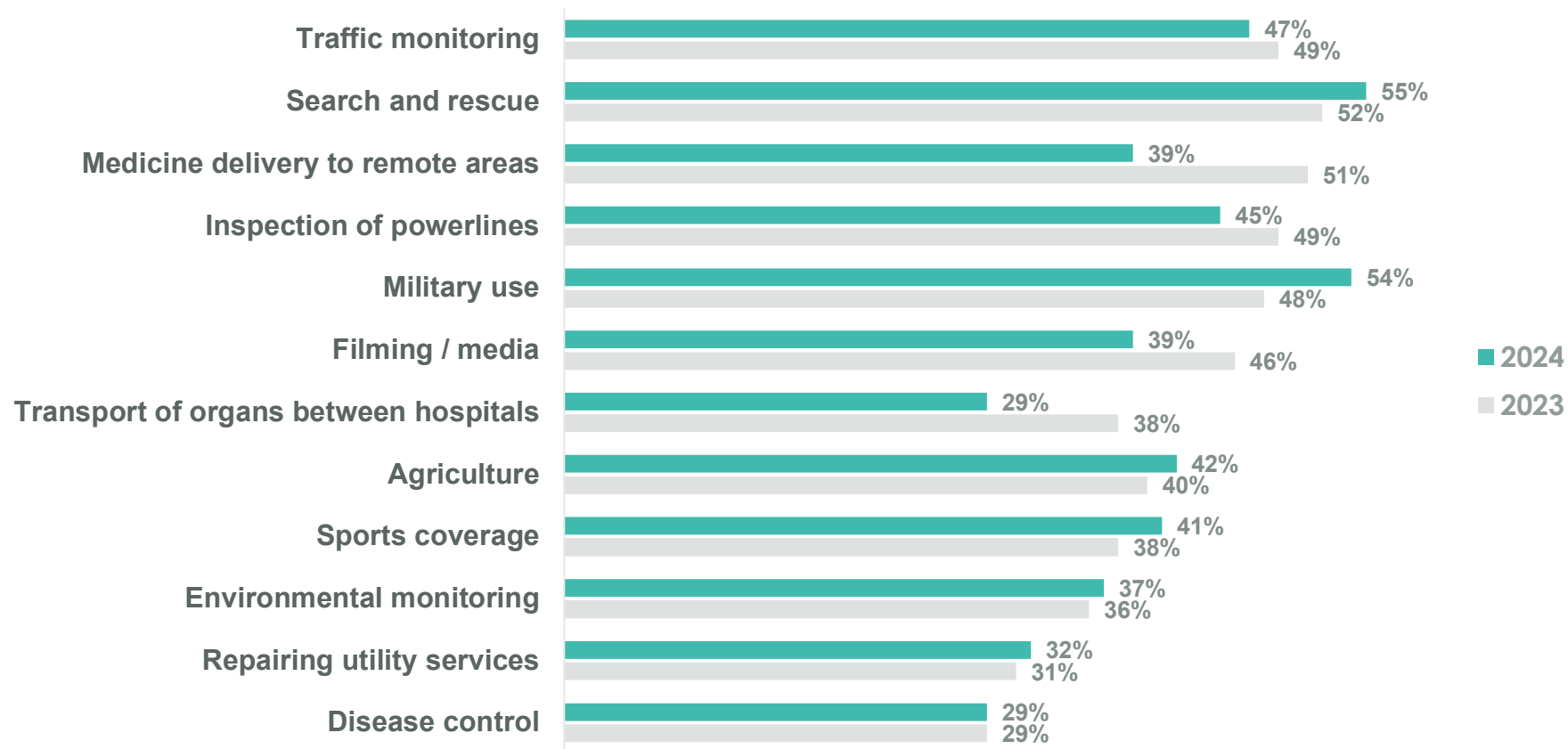
INNOVATION

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



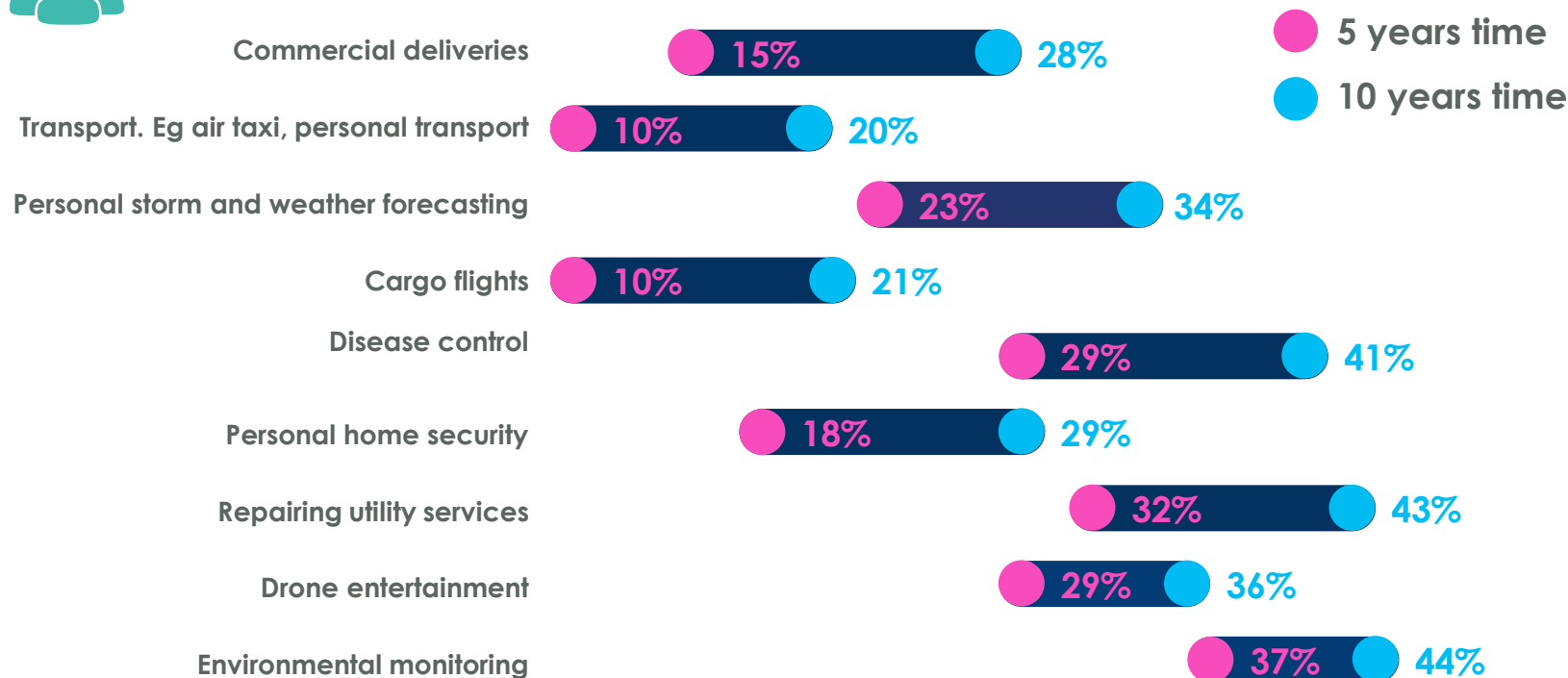
Expected drone uses in 5 years time

	2023	2024
Disease control	29%	29%
Repairing utility services	31%	32%
Environmental monitoring	36%	37%
Sports coverage	38%	41%
Agriculture	40%	42%
Transport of organs between hospitals	38%	29%
Filming / media	46%	39%
Military use	48%	54%
Inspection of powerlines	49%	45%
Medicine delivery to remote areas	51%	39%
Search and rescue	52%	55%
Traffic monitoring	49%	47%

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



Services expected to grow the most in next 10 years



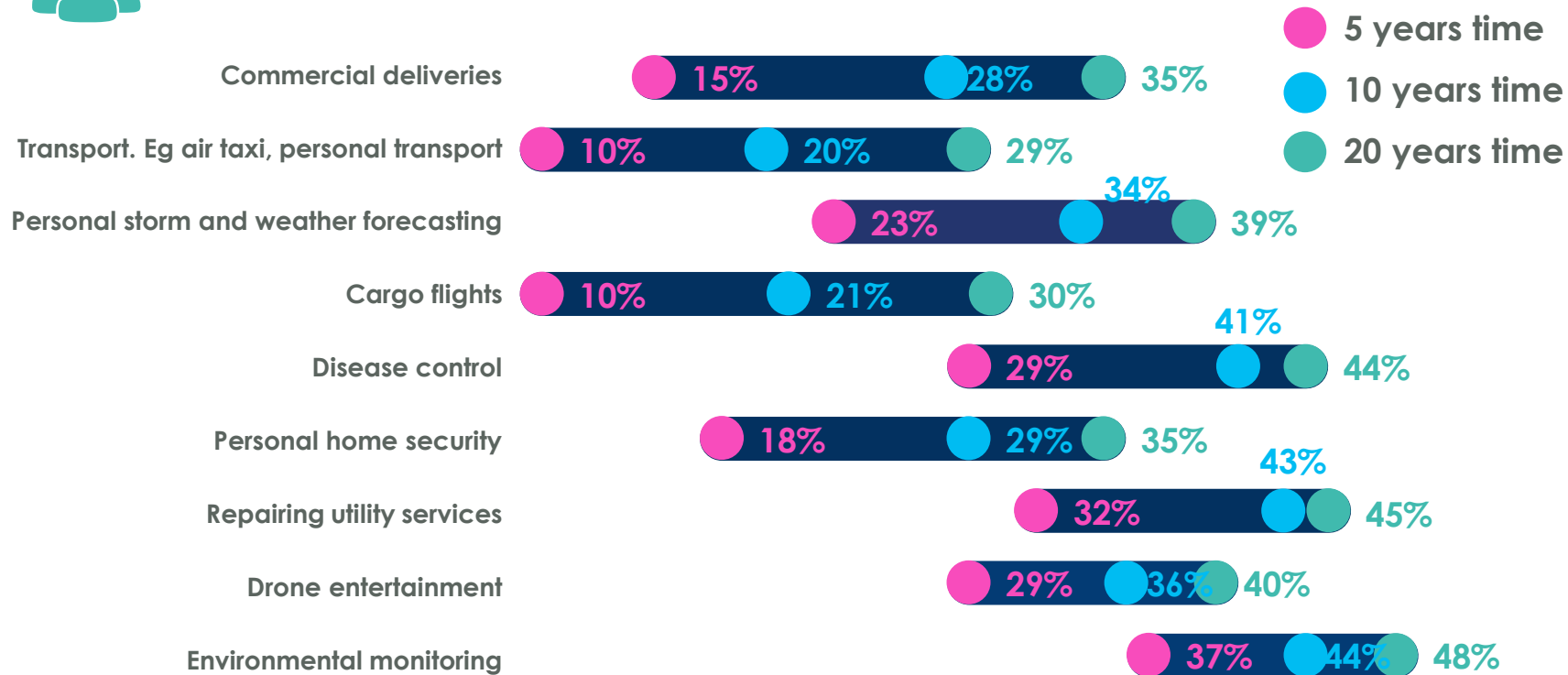
Services expected to grow the most in next 10 years

	5 Years Time	10 Years Time
Commercial deliveries	15%	28%
Transport. Eg air taxi, personal transport	10%	20%
Personal storm and weather forecasting	23%	34%
Cargo flights	10%	21%
Disease control	29%	41%
Personal home security	18%	29%
Repairing utility services	32%	43%
Drone entertainment	29%	36%
Environmental monitoring	37%	44%

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



Services expected to grow the most in next 10 years



Services expected to grow the most in next 10 years

	5 Years Time	10 Years Time	20 Years Time
Commercial deliveries	15%	28%	35%
Transport. Eg air taxi, personal transport	10%	20%	29%
Personal storm and weather forecasting	23%	34%	39%
Cargo flights	10%	21%	30%
Disease control	29%	41%	44%
Personal home security	18%	29%	35%
Repairing utility services	32%	43%	45%
Drone entertainment	29%	36%	40%
Environmental monitoring	37%	44%	48%

Positivity towards drone taxis is increasing, more so for piloted versions and especially amongst drone operators

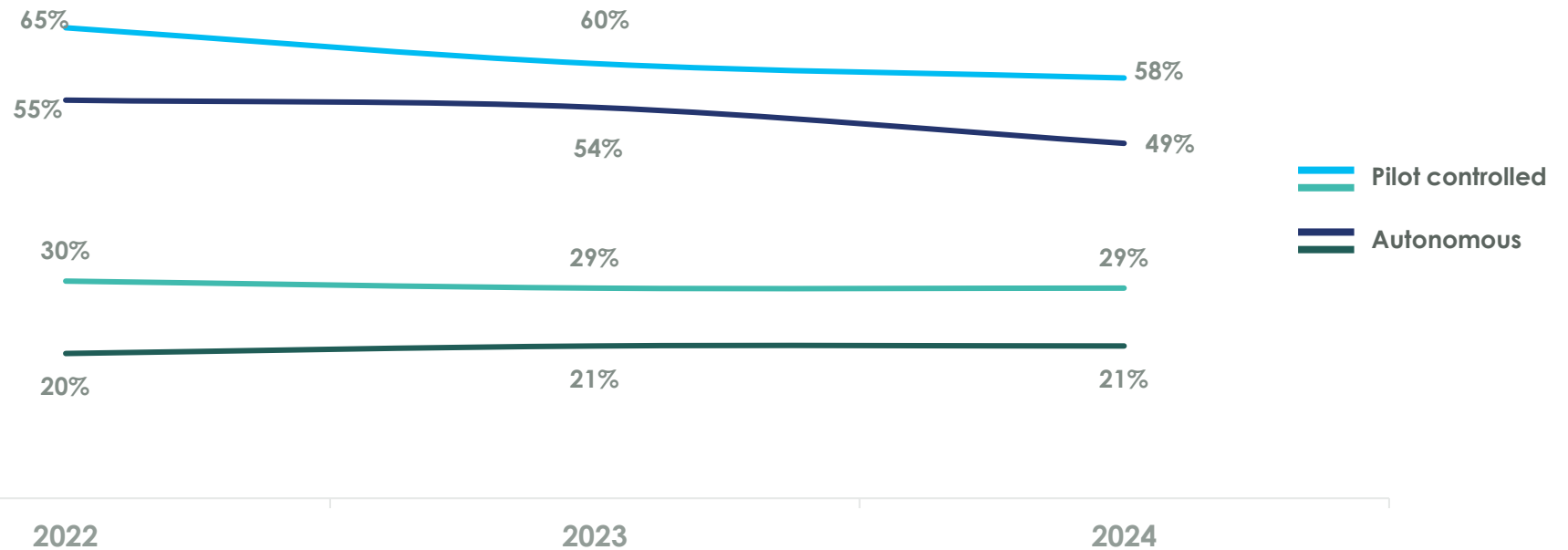
% who are positive towards drone taxis transporting people around like regular taxis



DRONE USERS



UK PUBLIC



Year	Drone Users - Pilot Controlled	Drone Users - Autonomous	UK Public - Pilot Controlled	UK Public - Autonomous
2022	65%	55%	30%	20%
2023	60%	54%	29%	21%
2024	58%	49%	29%	21%

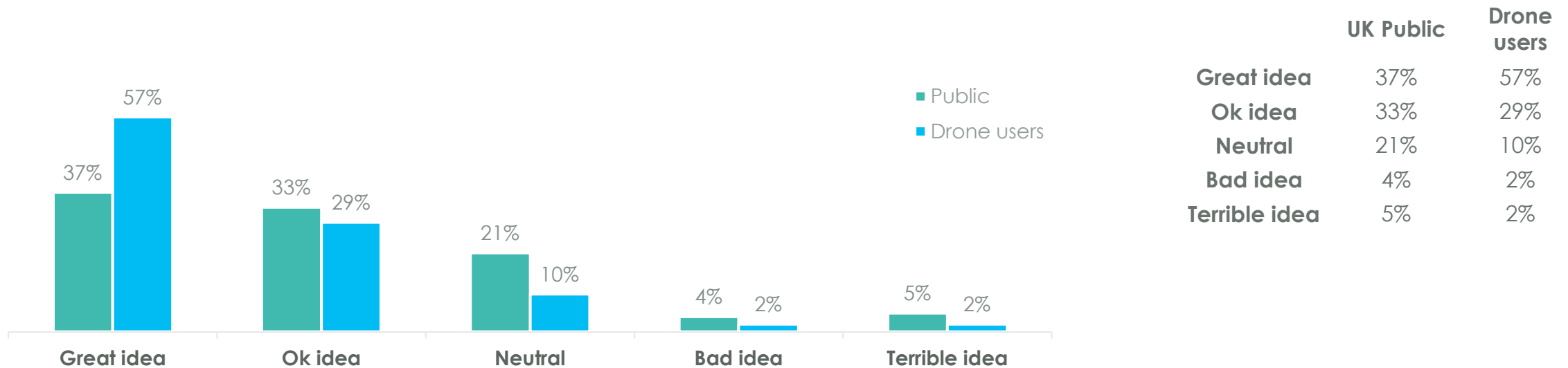
Q19A. "It has been suggested that drones may be used as taxis in the future. A drone taxi would be an unmanned aerial vehicle that carries passengers. If cities introduced drone taxis which transported people around like regular taxis, how do you think you would feel towards them?"

Base: UK public (1990); Drone users (500)

The use of light displays instead of fireworks to reduce environmental impact is largely supported, especially by drone users



Attitude towards using drones for light displays rather than fireworks to help reduce environmental impact



Q43. What do you think about using drones for light displays, rather than fireworks, to help reduce environmental impact?

Base: UK public (1990); Drone users (500)

Thank you
For any queries contact:



JORDAN WOOD

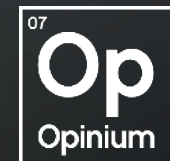
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What people think,
feel and do