

Medical BVLOS Drones: Wales and UK Perspectives

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1. Executive Summary

Embracing technology and innovation is core to the UK Government's Plan for Change as well as the NHS Fit for the Future mission. A proposed Welsh NHS Medical Drone Delivery Network that would enable Beyond Visual Line of Sight (BVLOS) drone operations has the potential to directly deliver to these ambitions. Public and community engagement was undertaken across Wales to understand perceptions and attitudes towards medical use drones. This report synthesises data from Wales and UK national-level surveys as well as community focus groups with a total of 66 members of the public, providing top-level insight into responses to BVLOS medical drone uses by the NHS in Wales and the UK.

Strong support for NHS drone use was identified, particularly if this achieves better services or patient outcomes. Applications that were seen as particularly beneficial were:

- Emergency services or critical incident response
- Movement of medical products, blood samples or tests
- Logistics between NHS hospitals and sites

Publics want to see NHS drone use that is **needs-driven** as there may be contexts where societal benefits outweigh current concerns. **Open and transparent engagement** with communities is required to ensure public support, especially given

specific concerns about BVLOS medical drone use by the NHS as well as wider concerns about drones at this time. There is also public concern that beneficial applications of drones through the NHS may provide a catalyst for the wider roll-out of BVLOS drones. In this scenario, there are perceived **trade-offs** that impact publics' support for BVLOS drones overall. Publics desired a strong and clear case for further NHS investments in medical drone innovation if this is scaled.

Four key recommendations are as follows:

1. **UK and Welsh national devolved government need to engage with the NHS as well as industry stakeholders** to ensure public and patient value is realised from the potential roll-out of BVLOS drones in 2027/2028.
 2. Discussions must focus on directly improving the delivery of NHS services and ensuring drone use is **proportionate to realising wider benefits**.
 3. **The 'drones for good' narrative needs to be challenged** where it undermines wider public concerns about medical drones, and risks surfacing 'medical washing' claims where it may be assumed beneficial NHS use is a pathway to less desirable public sector or commercial services.
 4. **Targeted, open and transparent engagement with communities is required** to address varying levels of public support as well as concerns specifically about BVLOS drones and their use in the NHS.
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2. Introduction and Policy Context

Embracing technology and innovation is core to the UK Government's Plan for Change. Drones have the potential to directly deliver to this Government's missions, and this includes 'Building an NHS Fit for the Future' as well as its long-term ambition to modernise the NHS. These goals are shared across devolved health systems in Wales, Scotland and Northern Ireland. Medical and emergency use drones may help to achieve better outcomes for patients and better value for taxpayers' money; however, this is yet to be fully realised. It is essential to work in partnership with the wider public at this time to ensure technologies and innovations used in the NHS are rolled out in socially desirable or beneficial ways. This report considers what this may involve in relation to drones.

Understanding and engaging with publics' hopes, expectations and concerns for future flight technologies is critical to their potential roll out. Engaging the public 'early and consistently' is thus a key part of the Department for Transport's Future of Flight Action Plan¹. The Department for Transport with the UK Civil Aviation Authority have also publicly committed to delivering Beyond Visual Line of Sight (BVLOS) drone operations by 2027/2028². BVLOS is considered a critical step towards scaling drone technologies and to realising public and commercial services. However, current BVLOS operations are restricted to single operators, undertaking operations under defined, bespoke conditions. The CAA's UK Airspace Modernisation Strategy (AMS) programme, an important regulatory step towards a fully integrated distributed aviation system accommodating traditional commercial and innovative aviation operations, includes provision for enhanced BVLOS operations. The 'unlocking' of BVLOS is therefore considered an important pathway to realising the wider societal opportunities of drones including in the NHS.

Several NHS trials and demonstrations of medical drones have already been supported by the Department for Transport, UKRI and Innovate UK,

including through the UKRI Future Flight Challenge programme (2019 – March 2025, £125 million).

Examples include:

- Test flights to move blood samples between Guys and St. Thomas' hospitals in London led by company Apian with NHS partners and drone operator Wing.
- The movement of surgical implants and pathology samples between University Hospitals Coventry and Warwickshire (UHCW) NHS Trust and Medical Logistics UK, by drone operator Skyfarer.
- PPE and COVID-19 test deliveries to the Isles of Scilly by Windracers and partners.
- Feasibility studies for a national drone logistics network in Scotland to transport and deliver chemotherapy drugs, blood, organs and other medical products, delivered by Project CAELUS.

More recently, Project Dragon's Heart led by Snowdonia Aerospace was funded by the Department for Transport and Innovate UK as part of Phase 4 of the Future of Flight programme (September 2025 – March 2026). This project explored drone-based medical logistics deliveries for the NHS Blood Service in Wales. In partnership with SLINK-TECH, Skyport Drone Services and Volant Autonomy, Dragon's Heart undertook drone test flights from Snowdonia Aerospace Centre and from the Welsh Blood Service in Wrexham. In addition, Project Dragon's Heart met with NHS frontline staff at Talbot Green and Wrexham in February 2026 to show how specialist medical drones may be used to transport blood samples.

Significant public expenditure has therefore been invested in seeking to understand the potential of BVLOS medical drone operations and its wider benefits for NHS services and delivery. An ongoing

¹ Department for Transport, *UK Future of Flight Action Plan*, UK Future of Flight (Department for Transport, 2024), <https://www.gov.uk/government/publications/future-of-flight-action-plan>.

² UK Civil Aviation Authority, *Future of Flight: BVLOS Roadmap*, no. 1 (October 2025), <https://www.caa.co.uk/data-and-publications/publications/documents/content/cap3182/>.

implication of these activities is an urgent need for dialogue with publics to determine what their perceptions, attitudes and behavioural responses towards these rapidly developing technologies may be.

The University of Birmingham has been responding to this need by designing and delivering a social science research programme assessing UK public perceptions and attitudes towards civilian-use drones. Building on baseline survey data undertaken during Phase 3 of the Future Flight Challenge programme, the University of Birmingham have been working with the Welsh Ambulance Services NHS Trust and Snowdonia Aerospace to explore public perceptions and attitudes towards medical uses of drones. This report presents findings from nationally representative surveys conducted in Wales and the UK between 2024 and 2025³ and focus groups with 66 members of the public undertaken in February and August 2026.

3. Key Findings

Publics largely support the roll out of medical drones as they understand the potential of these technologies to directly benefit the NHS and the delivery of essential and emergency services. However, drones should be introduced where they offer the clearest gains to efficacy and efficiency of service delivery.

Medical uses of drones such as supporting emergency services were perceived to be beneficial by a large majority of Welsh and UK publics surveyed. Survey and focus group participants can see the potential of these technologies to directly benefit the delivery of NHS services. Focus group

participants narrated the potential benefits of medical drones through experiences and anecdotes of existing NHS services, with one focus group participant describing moving blood samples by drone as a “perfect opportunity” (FG1). Participants recognised a range of potential benefits from medical drones, including improving provision of medications. Examples discussed included patients undergoing chemotherapy, thereby reducing their travel requirements, or in emergency situations, such as those requiring an EpiPen during an allergic reaction.

Drones are perceived by Welsh and UK publics to be particularly beneficial for the delivery of NHS services in rural, remote or isolated areas (see Figure 1). Participants discussed the existing transport connectivity challenges in Wales and the implications this has on NHS service delivery, citing poor road links, particularly from North to South Wales, and the requirement of many mid-Wales communities to access healthcare settings in England.

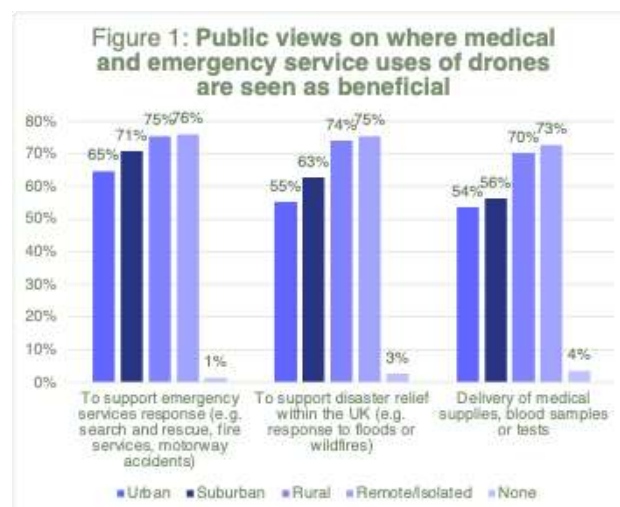


Figure 1. Survey Question: For each use listed, please indicate whether you think non-passenger carrying drones would be beneficial or not beneficial within different types of community in the UK. Please select all communities, if any, where you think this technology would be beneficial. Options: Beneficial in urban locations (e.g. city and town centres), Beneficial in sub-urban locations (e.g. outside city/town centres), Beneficial in rural locations (e.g. villages and countryside), Beneficial in remote or isolated locations (e.g. islands or mountainous areas), Not beneficial to any community in the UK, Don't know [Wales Base n=695, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov].

³ Nationally representative survey data for Wales and the UK in this report was conducted between December 2024 to January 2025, unless otherwise specified.

In focus groups, publics emphasised that NHS use of medical drones should be proportionate to the level of impact it may have on achieving better services or outcomes (e.g. better patient outcomes; better value for taxpayers' money). This reflects findings from the previous University of Birmingham public dialogue that Future Flight technologies and services would be welcomed "if – and only if – investment in this technology would offer something better than investing the same resource in existing transport technologies and services"⁴. The use of 'public good' as a guiding principle continues to be relevant for NHS medical drone use where publics want to see technologies *enhancing* rather than *replacing* existing service delivery.

Publics most want NHS medical drone use to be needs-driven, such as prioritising critical or emergency response

Most prevalent amongst our Welsh qualitative research participants was an understanding that any NHS use of medical drones should be needs-driven as there may be specific contexts that determine the social benefit and value. Supporting critical or emergency response was a priority with the caveat that the use of drones and other technologies did not fully replace human intervention in scenarios where this is required (e.g. cardiac arrests). Participants felt that emergency or critical response was the exception where concerns about drones were mitigated by their potential need or where they clearly deliver benefits: "if there's emergency situations, I don't think I have a single thing that I would be like 'no, I don't want them there'. If it's an emergency, it's an emergency and that's what it's for" (FG1). Alongside time-sensitive, emergency incidents, participants agreed the transportation of medical products and blood was beneficial, particularly for underserved or hard-to-reach areas. Our Wales survey data supports this where the movement of medical supplies, blood sample or test deliveries are perceived to be most beneficial in those areas (see Figure 1). Participants noted the importance of a Welsh national medical drone delivery network being connected to hospitals in England such as Birmingham, Liverpool and Manchester. This again reflected the needs-driven

logic participants deployed to assess possible drone use.

Focus group participants also wanted to see a strong and clearly evidenced rationale for medical drones that explains the challenges they would solve for the NHS. This was considered important by some participants who perceived setting up NHS medical drone uses to be costly. One participant summarised this concern: "there needs to be a real process of identifying what it will solve that other more traditional methods won't" (FG5). Cost-benefit analyses that underscore where financial benefits can be achieved for the NHS were highlighted several times. Participants also raised concerns about the possible levels of NHS investment required to realise the benefits of medical drone innovation at scale.

The 'Drones for Good' narrative should not displace specific concerns publics share about medical drones

A 'drones for good' narrative present in industry assumes the association of the most beneficial uses of drones will generate broader 'acceptance' of drones for a variety of different uses⁵. Emergency or medical drones are oftentimes referred to as a way of nurturing overall positive public sentiment for drones. This is a narrative that risks displacing specific concerns publics have about the potential use of medical drones, particularly by the NHS. In addition to the top-level concerns Welsh and UK publics share about drones in general, our focus group participants shared their concerns about NHS use of medical drones in particular:

- **Operational vulnerabilities** – there were concerns that an 'overreliance' on new drone technologies to deliver NHS services will create system and operational vulnerabilities: "what are the contingencies in place if something goes wrong?", for example, and "we do need to consider the safety of all of this" (FG1)
- **Staff and patient security at NHS sites (e.g. hospitals, pharmacies)** – questions

⁴ Thinks: Insight and Strategy, *Framework for Future Flight in the UK - Principles from a Deliberative Public Dialogue* (2024), 84, <https://futureflightssocial.ac.uk/research/public-dialogue-principles/>.

⁵ See, for example: Connected Places Catapult Places Catapult, *Promoting Drones For Good: A Communications Plan* (Connected Places Catapult, 2022), 41, <https://cp.catapult.org.uk/news/public-perception-of-drones/#:~:text=%E2%80%8B%20Connected%20Places%20Catapult%2C%20in,drone%20usage%20in%20the%20UK.>

were raised about drone take-off and landing sites and security

- **Data security** – focus group participants raised the data security implications of drones as well as the use of private sector drone operators for NHS services
- **Theft of medicines or medical equipment such as defibrillators** – a concern raised by participants regarded the systems that would need to be put in place to safeguard high value medicines and equipment that may be targeted for theft
- **Job displacement** – several participants questioned whether an increased roll-out of medical drones could lead to job losses in the NHS, and associated consequences for care delivery for vulnerable or isolated patients
- **Service lifespan of medical drone equipment** – participants queried the operational, environmental and cost-benefit sustainability of medical drone equipment

While it should be noted that increased noise pollution ranks tenth in the top-level concerns of Welsh and UK publics surveyed on drones (see Table 1), our focus group participants raised the particular sensitivities that NHS patients may have to noise pollution if drones were to land in proximity to NHS hospitals or sites. A participant with a medical background questioned the impact drone noise may have for patients with specific learning disabilities. Participants also reflected the potential mental health implications where drone noise from flyovers may act as a trigger for people experiencing PTSD or those with experiences from active theatres of war. This may be a concern that can be mitigated by careful decision making about landing sites on NHS estates.

Public concerns reflect the current stage of technological development and deployment given that drones are not yet being widely used by the NHS. These are some of the considerations government, industry and NHS stakeholders will need to take into account as these technologies and their use begins to scale up.

Table 1: Potential concerns about drones: Wales and UK publics

	Nationally Representative Samples	
	UK	Wales
Cyber security threats (e.g. hackers attacking vehicle operating systems)	85%	83%
The potential for use in criminal activity	81%	80%
The impacts on animals, such as birds or agricultural animals	80%	79%
Invasions of privacy (e.g. from low-flying air vehicles, in-air videorecording)	79%	77%
Collisions into ground or buildings	76%	75%
The potential for skies to become crowded with aircraft	75%	74%
How technologically safe these aircraft would be	74%	73%
Mid-air collisions with other aircraft	76%	72%
Habitat destruction when building new on-ground infrastructure (e.g. new drone ports)	67%	65%
Increased noise pollution	62%	63%
The potential for job losses	61%	59%
Impact on house and land values nearby new drone ports	53%	47%
Increased on-ground traffic nearby new drone ports	53%	49%
Duplication of existing services that use road or rail transport	49%	43%

Table 1. Survey Question: A number of potential drawbacks of non-passenger carrying drones have been suggested. For each of the potential drawbacks listed below, please tell us how concerned or unconcerned you are about it in relation to the development of non-passenger carrying drones. Options: Very concerned, Somewhat concerned, Not very concerned, Not at all concerned, Don't know [UK Base n=3588, Wales n=695, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov] Net: Concerned.

If the roll-out of civilian-use drone technologies is ‘inevitable’, then publics would like to see measures put in place to ensure its wider societal benefits are balanced and distributed between NHS or other public sector uses with commercial services

Some focus group participants perceived a current lack of agency in determining whether drone technologies are rolled out or not. An inevitability narrative that “regardless of what we say here today, they’re [drones] going to be everywhere. It doesn’t make any odds what anybody says, it’s happening. It’s happening now” (FG2) reflects a concern we found across our research of a perceived and potential democratic deficit. Our nationally representative survey data for Wales and UK shows a strong appetite for mechanisms in which the general public input on issues related to the development of drone technologies (see Table 2). This highlights that 19% of publics surveyed in Wales who perceived medical drones as not being beneficial in any location, still thought they are likely to come into operation in the next 10 years⁶.

Where BVLOS drone use was seen as ‘inevitable’, publics encouraged measures to ensure the wider societal benefits of drones are balanced and distributed between NHS and other public sector uses with commercial services. There may be multiple ways in which this could be achieved but discussions would be needed to realise this balance. Importantly, this reflects the findings from the public dialogue exercise where participants worried that future flight technologies and services would be dominated by international corporations with UK publics seeing few returns⁷.

Table 2: Importance of input from members of the general public on various issues related to the development of future flight technologies

Issues Related to Development of Future Flight Technologies	Wales	UK
Regulations around privacy (e.g. how recordings captured by air vehicles are stored and accessed) and data management (e.g. how personal data is stored and accessed).	81.3%	79%
Placement of flight paths.	79%	77%
Levels of noise and visual pollution.	79.7%	79%
Placement of vertiports (areas that can support the take-off and landing of eVTOL aircraft) and drone hubs.	77.9%	76%
Ensuring services are inclusive of those living with disabilities, health conditions, and neurodivergence.	73.6%	74%

Table 2. Survey Question: In the workshops held with members of the general UK public, they discussed how different groups in society may need to be consulted to get their views on a variety of issues related to the development of future flight technologies. For each of the issues listed below, please indicate how important or unimportant you think it is to consult each of the following groups. Options: Very important, Somewhat important, Neither important nor unimportant, Not very important, Not at all important [UK Base n=3588, Wales n=695, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov] Net: Important.

⁶ Survey question: Thinking about each of the ways in which the different future flight technologies mentioned previously might be used, please now tell us how likely or unlikely you think it is that these will become widespread in the UK within the next ten years. Option: Delivery of medical supplies, blood samples or tests, Scale: Very likely, Somewhat likely, Not very likely, Very unlikely, Don't know. [UK Base n=3588, Wales n=695, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov] Net: Likely.

⁷ Thinks: Insight and Strategy, *Framework for Future Flight in the UK - Principles from a Deliberative Public Dialogue*, 43.

Targeted, open and transparent engagement with publics, patients and NHS staff is required ahead of the potential roll out of BVLOS drone operations

With proposed timelines for scaling BVLOS drone operations by 2027, there is a need for open, targeted and transparent engagement with publics, patients and NHS staff on medical drones. Our Wales survey highlights there is varied likelihood of support for BVLOS drones from publics across regions of Wales (see Figure 2). For instance, a fair proportion of publics surveyed in South Wales West (40%) and Mid and West Wales (33%) were unlikely to support drones operating BVLOS⁸. It is important to note that a large proportion of publics surveyed from South Wales West self-identified as living in urban areas, where drones were perceived as less beneficial. However, 62.7% of publics identify as living in rural areas in Mid and West Wales, potentially reflecting particular sets of concerns that were highlighted in focus groups on social isolation or visual congestion. There are large groups who are neutral in their likelihood of supporting drones operating BVLOS in South Wales Central or North Wales (48%, 40%) (see Figure 2).

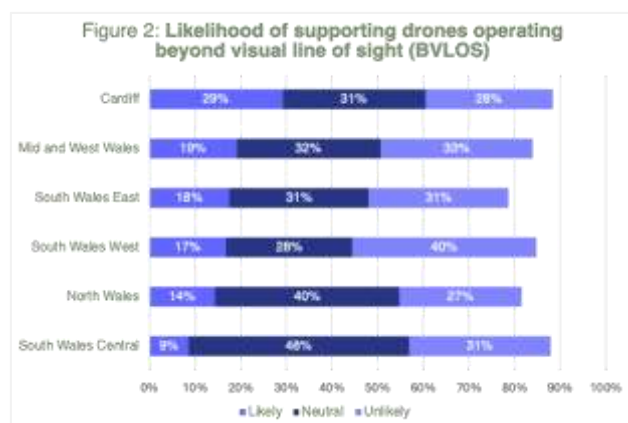


Figure 2. Survey Question: On a scale from much more likely to much less likely, how more or less likely would you be to support the wider scale usage of drones in the UK if they operated OUTSIDE of the visual line of sight of

their operators. Options: Much more likely, Somewhat more likely, Neither more nor less likely, Somewhat less likely, Much less likely, Don't Know. [Wales n=695, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov] Net: Likely.

Participants expressed a desire for engagement with communities including the general public, the NHS (including pharmacies), blood banks, organ donors, aviation schools and local councils. The necessity of ongoing engagement and transparent communication in the lead up to and throughout the roll-out of drone technologies was articulated by several participants. It is important to note when engaging in communication about the scale-up of BVLOS drone operations, Welsh publics had different perspectives on who was the most reliable when it comes to accurately explaining the impacts of technological developments on society. Our Wales survey data⁹ shows the top groups public find reliable are:

- Researchers working at a UK university – 74% reliable
- Environmental protection organisations – 58% reliable
- Researchers undertaking government research – 56% reliable
- Consumer organisations – 52% reliable
- Researchers working in an industrial or privately funded research organisation – 49% reliable

⁸ See Appendix for full map of Wales by region.

⁹ Survey Question: For each of the following categories of people and organisations, please tell us how reliable or unreliable you believe they are for accurately explaining the impact of technological developments on society? Scale: Very reliable, Somewhat reliable, Not very reliable, Not at all reliable, Don't know. [Wales n=695, age 18+, nationally representative, data collected Dec '24-Jan '25, University of Birmingham/YouGov]

4. Conclusion and Recommendations

Whilst Welsh publics broadly perceive there to be benefits from medical uses of drones, priority should be given to realising their benefits in proportion to the needs of the NHS and enhancing the delivery of essential and emergency services. Publics understand there are opportunities to use drones to enhance NHS service delivery in Wales including reaching underserved and hard-to-reach communities as well as supporting high-demand services such as A&E hospital departments. This report shows Welsh publics want NHS drone use to be proportionate to the realisation of those benefits. Ongoing and transparent engagement with communities is required for public support to be maintained, to ensure that public concerns are best able to be mitigated, and the identified benefits of BVLOS medical drones are realised as operations unfold.

Four key recommendations follow from these findings.

UK and Welsh national devolved governments need to engage with the NHS as well as industry stakeholders to ensure public and patient value is realised from the potential roll-out of BVLOS drones in 2027/2028. Publics engaged with in this research were not opposed to medical drone innovation in principle but consistently asked for a clear rationale as to what problem drones would solve for the NHS that existing services could not. This points to a need for government, NHS bodies and industry to work together from the outset, so that decisions about scaling BVLOS operations are anchored in demonstrable service need rather than technological momentum alone. Given the scale of public investment already directed towards medical drone trials and demonstrations, this engagement should also provide publics with a clear account of the value being generated, including a robust cost-benefit rationale of the kind participants repeatedly called for.

Discussions must focus on directly improving the delivery of NHS services and ensuring drone use is proportionate to realising wider benefits. Across our focus groups, publics distinguished between drone use that is purposeful and drone use that risks becoming an end in itself. Applications prioritised by publics, including emergency and critical incident response, the movement of blood and medical products, and logistics between NHS

sites, should therefore anchor early BVLOS deployment. Government and NHS stakeholders should resist scaling drone operations beyond these needs-driven use cases until a clear and proportionate case for wider service benefit has been established.

The 'drones for good' narrative needs to be challenged where it undermines wider public concerns about medical drones, and risks surfacing 'medical washing' claims where it may be assumed beneficial NHS use is a pathway to less desirable public sector or commercial services. Whilst medical and emergency applications are often used within industry to generate broader positive sentiment towards drones, our findings show publics do not straightforwardly transfer support for NHS drone use to drone use more generally. Concerns specific to medical drones, including operational vulnerabilities, NHS site security, data security, theft of medicines or equipment, job displacement, and the sustainability of medical drone equipment, remain distinct from, and should not be displaced by, a general 'good news' framing. Nor should the perceived legitimacy of NHS use be leveraged to accelerate less publicly supported commercial or public sector BVLOS operations. Policymakers and industry should therefore ensure that medical applications are communicated and assessed on their own terms, with the risks and trade-offs specific to NHS contexts made explicit rather than assumed away.

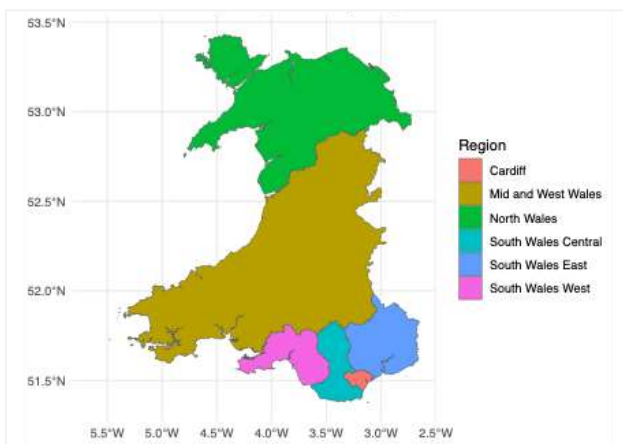
Targeted, open and transparent engagement with communities is required to address varying levels of public support as well as concerns specifically about BVLOS drones and their use in the NHS. Our survey data shows meaningful regional variation in likely support for BVLOS operations across Wales. This engagement should extend beyond the general public to include NHS staff, pharmacies, blood banks, organ donation services, aviation schools and local councils, and should draw on the sources publics regard as most reliable, notably university researchers and government-funded research, in communicating the impacts of these technologies. Sustained and transparent dialogue of this kind will be essential to ensuring that public concerns are addressed as BVLOS medical drone operations move from trial to scale.

5. Appendices

A mixed-methods approach combining focus groups with nationally representative surveys was used to identify Welsh public perceptions and attitudes to BVLOS drones. A survey designed by University of Birmingham researchers and administered by YouGov between December 2024 and January 2025 was conducted at the Wales (n=695) and UK national level (n=3588). Focus group data collection was undertaken in February and August 2026, totalling 66 participants. Two in-person focus groups were conducted in Wales in February 2026 with 31 participants. Six online focus groups were conducted in August 2026 with 35 participants. A systematic analysis of this material was undertaken to identify Wales and UK publics' hopes, concerns and expectations towards medical BVLOS drones. This report is based on findings from public perceptions and attitudes research data from December 2024 up to August 2026.

In this report the following regional breakdown is used:

Wales by Senedd Region (with Cardiff separate)



Future Flight Social Insight.

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