

Shared Skies: Public Trust, Trade-offs and the Future of BVLOS Drone Integration in the UK

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1. Executive Summary

Overall, there are mixed perceptions of BVLOS drone use in the UK and unsurprisingly attitudes vary by use case. Whilst there is in places a cautious optimism around emerging drone uses in the UK, this tends to be where the wider public benefits are more tangible or drones are seen as serving a specific social or public sector need. This optimism is more evident for use cases where publics see societal benefits e.g. support for emergency services, more convenient access to services for those in rural areas, and supporting environmental monitoring. For some use cases this picture is less clear cut. For instance, whilst commercial delivery drones are seen as the least socially beneficial use case overall in our surveys, when we examine this across regions/locations, they are more likely to be seen as responding to a need and therefore are perceived as being more socially beneficial in rural, semi-rural, or remote areas. On the other hand, there are also important regional or location-contingent differences in terms of support for urban commercial drone deliveries – with support for this use case being highest in London. Understandably, not only is public support use-case specific, but location- and community-

specific. However, whilst seeing some potential benefits, our survey respondents have identified a number of potential drawbacks and our qualitative research participants have been engaged in nuanced conversations around the trade-offs between potential benefits, social need and drawbacks.

UK publics' primary top-level concerns focus on cyber security, the potential for drones to be used in criminal activity, impacts on wildlife, privacy, and various aspects of safety (in air and on-ground). Notably, noise has consistently *not* been the top concern across our qualitative and quantitative data collection. A further, and arguably more fundamental, finding is that publics do not evaluate drone use cases in isolation. When asked to reason about medical, police and commercial delivery drone use together, as parts of a single emerging system, support does not simply accumulate from the most popular use cases outward. Instead, a meaningful proportion of the public who recognise clear benefits in specific applications nonetheless judge that the overall balance of benefits and drawbacks is unfavourable once the full system is considered, and association with less trusted or less clearly necessary applications - such as some commercial delivery uses that were viewed as more frivolous - can

actively undermine support for more beneficial ones, including medical and emergency use. **This finding directly challenges assumptions underpinning much current "drones for good" communication, and indicates that public trust must be built and maintained at the level of the system as a whole, not secured use case by use case.**

Taken together, our findings describe a public that is broadly supportive, engaged and discerning, rather than simply optimistic or resistant – **public support is real, and for some uses cases strong, but conditional** on transparency, proportionality, genuine accountability, cross-sector coordination, and meaningful involvement in how these systems are designed and deployed. On this basis, we set out five recommendations in Section 5 below:

- 1) **Establish transparent and accountable oversight structures**, closing current gaps between regulators and creating genuine mechanisms for citizen input and establishing new oversight mechanisms where existing bodies were not designed to cover the range of concerns, issues or risks that emerging drone systems and services present.
- 2) **Communicate honestly about the full balance of benefits, risks and drawbacks as a**

system, rather than relying on a generalised "drones for good" narrative.

- 3) **Deliver early and meaningful public engagement** that feeds into real decisions at both local and national levels.
- 4) **Ensure communication and engagement is sensitive to local and demographic context**, without treating any community or group as homogeneous.
- 5) **Invest in continued, independent research** to track attitudes and inform policy as BVLOS operations scale up.

The window to act on these recommendations is open now, while operations are scaling, but will narrow as BVLOS drone use becomes routine.

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2. Introduction and Methods

In collaboration with the Department for Transport, and through the UKRI Future Flight Challenge programme, the University of Birmingham delivered a social science research programme between July 2021 and March 2026 that assessed UK public and key stakeholders' perceptions and attitudes towards beyond visual line of sight (BVLOS) drone technologies, systems and services. Since March 2022, through our research we have engaged with over 12,000 members of the public from across the UK about their hopes, concerns and expectations, as the future of flight transitions from future vision to imminent reality.

This has included:

- Two in-depth deliberative dialogues with a UK-wide cross-section of members of the public
- Nationally representative surveys for the UK, Scotland, and Wales, as well as a regionally representative survey for the Highlands and Islands
- Public and community engagement including focus groups and semi-structured interviews with a cross section of members of the public and stakeholder groups across the UK and as part of use case specific regional case studies.

This report gives an overview of our overall qualitative and quantitative findings on UK public hopes, concerns and expectations in relation to emerging public sector and commercial beyond visual line of sight (BVLOS) drone operations in the UK.

3. UK Publics' Perceived Benefits and Drawbacks

3.1 UK Publics' Perceived Benefits of BVLOS Drone Operations

The majority of publics see drones as beneficial for providing support to emergency services (90%), providing more convenient access to services for isolated areas or communities in the UK (89%) and supporting environmental monitoring (82%) [see figure 1]. These survey findings are also broadly supported by our qualitative regional case studies conducted in 2026.

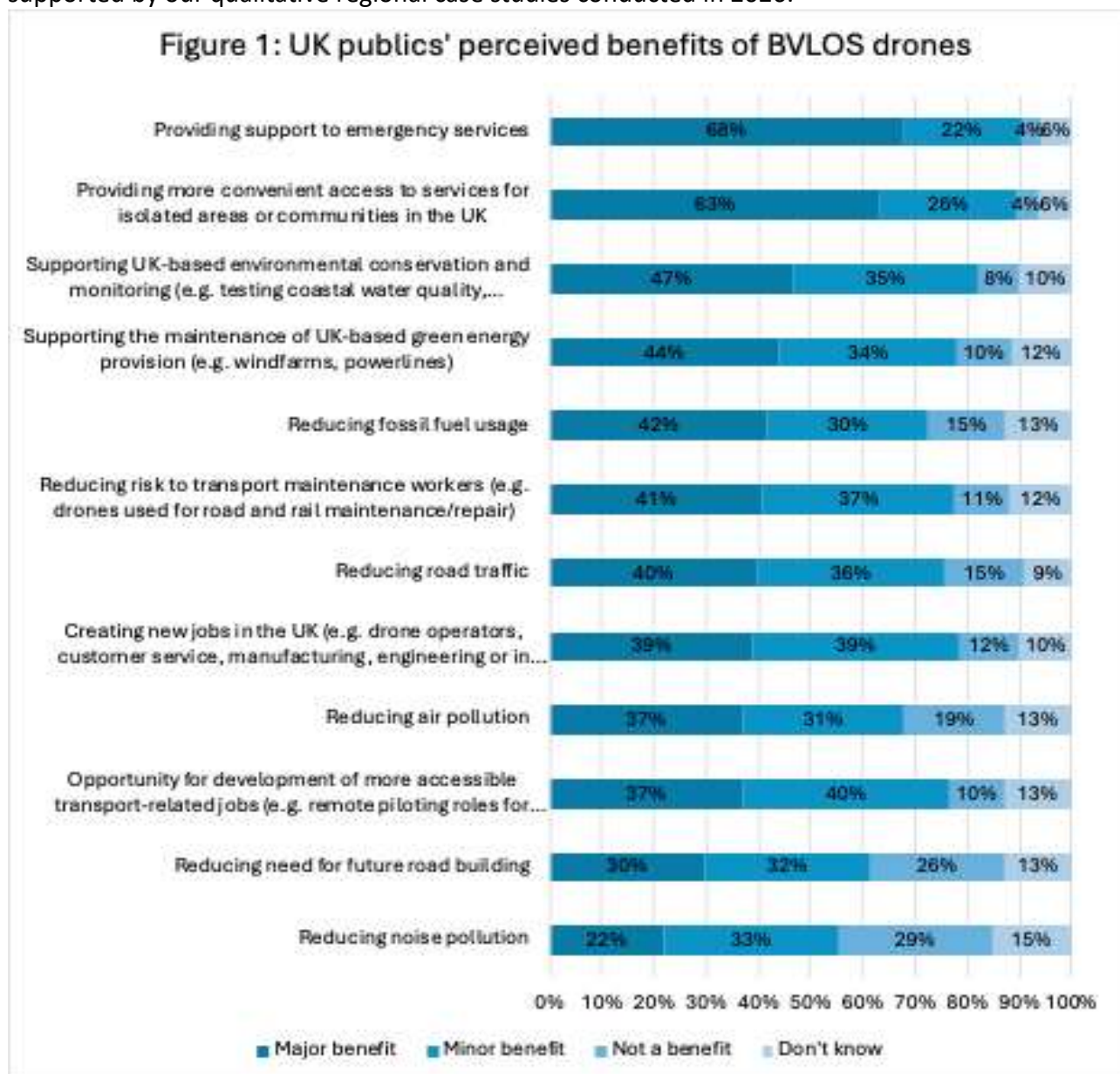


Figure 1 Survey Question: A number of potential benefits of non-passenger carrying drones have been suggested. For each of the potential benefits listed below, please tell us whether, in your view, you think it will be a major benefit, minor benefit or not a benefit of non-passenger carrying drones. Where survey data presented throughout it has been taken from survey samples collected by YouGov on behalf of the University of Birmingham between December 2024-January 2025, nationally representative sample of 3588 UK adults aged 18+.

In our South West regional case study, strong support for environmental monitoring drones was identified, with applications linked to monitoring of land use and land management, and real-time and long-term flood monitoring recognised as particularly beneficial uses. However open and transparent communication of where, when and why BVLOS drones are being used is integral to ensuring public support. Likewise, mechanisms for ongoing local engagement and oversight were flagged as key to ensuring publics had a stake in these systems.¹

In our Wales regional case, there were strong levels of public support expressed for medical uses of drones², with applications such as emergency services and critical incident response, movement of medical products, blood samples or tests, and logistics between NHS hospitals or sites viewed as most beneficial. Publics wanted NHS use of drones to be needs-driven, prioritising achieving better services or patient outcomes. Proportionate use of medical drones that does not risk or displace the quality of care delivered by the NHS was an expectation of Welsh publics.

In our UK-wide survey publics were asked to consider not only how drones might be used, but also where their use might provide benefits. Table 1 shows the perceived benefit of potential uses of drones across different locations: urban (e.g. city and town centres), suburban (e.g. outside city and town centres), rural (e.g. villages and countryside), remote or isolated (e.g. islands or mountainous areas) or a null option where use cases were perceived to provide no benefits to any UK community. More respondents see drone uses as providing benefits in rural and remote or isolated locations, even for the most widely supported use cases. For example, 10% more see emergency services drone use as beneficial in remote or isolated locations compared to urban locations. The only use case where the converse is true is drone use for policing – where publics are more likely to see this as beneficial in urban areas. Caution is needed here though as respondents in rural areas are actually more likely to view police drone use in urban locations as beneficial (70% rural respondents vs. 64% urban respondents). This pattern (which is not repeated for wider emergency service uses) may reflect that people outside larger cities often perceive urban areas as having higher crime rates and greater policing needs. Regional variations in responses are also notable: for example, respondents in London are least likely to see police drone use as beneficial (58%), while those in the South West are most likely to do so (71%). This indicates that perceptions of the value of drone use are shaped not only by the potential application, but also by the location in which drones are used.

Similarly, whilst drones for household deliveries are seen as one of the least popular use cases overall in urban areas (35%), they are significantly more supported in rural (55%) or remote isolated communities (59%). However, while only 37% of people who self-identify as living in urban areas view urban household deliveries as a beneficial use case, this rises to 48% of respondents who live in London. When we look at urban and rural household deliveries by age group we find that people aged 18-34 years old are most likely to support urban household drone deliveries (urban household deliveries net beneficial by age - 18-34yrs: 46%, 35-54yrs: 35%, 55+yrs: 25%) whereas support for rural household deliveries is more likely to be supported by older age groups (rural household deliveries net beneficial by age- 18-34yrs: 51%, 35-54yrs: 57%, 55+yrs: 57%). Therefore, it is not

¹ Data were collected between January-February 2026, via five community engagement meetings and four key stakeholder interviews to assess attitudes to BVLOS environmental drones in the Somerset Levels and Quantocks regions.

² Focus groups were conducted with 66 members of the Welsh public in February and August 2026 to attitudes to BVLOS medical use drones. Two in-person focus groups were undertaken with 31 participants in February 2026. Six online focus groups were conducted with 35 Welsh members of the public in August 2026.

simply the case that younger age groups will be more likely to perceive benefits than older age groups, it is that the perception of benefits is location contingent by age group.

Consideration of *where* drones may provide benefits is therefore important alongside consideration of *why* and *how* they are used, and by *whom*.

Table 1: UK public perceived benefits of drones by location/community

	Urban	Sub-urban	Rural	Remote/ Isolated	None
To support emergency services response (e.g. search and rescue, fire services, motorway accidents)	63%	67%	74%	73%	2%
Inspection and maintenance of infrastructure in hard to reach or high-risk environments (e.g. powerlines, offshore wind farms, railways, roads)	53%	56%	69%	72%	2%
To support disaster relief within the UK (e.g. response to floods or wildfires)	55%	60%	73%	72%	3%
Delivery of medical supplies, blood samples or tests	55%	58%	69%	70%	5%
Farming and agriculture (e.g. smart farming, surveying, monitoring livestock, crop health monitoring, disease detection, precision crop spraying to reduce waste)	21%	29%	74%	60%	4%
Delivery of mail, parcels or packages to local collection hubs	40%	45%	57%	57%	11%
Police surveillance	65%	58%	55%	53%	12%
Delivery of mail, parcels or packages to individual households	35%	41%	55%	59%	13%
Police monitoring of borders	40%	41%	50%	56%	12%
Commercial movement of goods and materials	36%	40%	50%	51%	15%

Table 1 Survey Question: Listed below are some examples of the ways in which non-passenger carrying drones might be used. 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. 1) Beneficial in urban locations (e.g. city and town centres), 2) Beneficial in sub-urban locations (e.g. outside city/town centres), 3) Beneficial in rural locations (e.g. villages and countryside), 4) Beneficial in remote or isolated locations (e.g. islands or mountainous areas), 5) Not beneficial to any community in the UK, 6) Don't know, [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

3.2 UK Publics' Perceived Drawbacks of BVLOS Drone Operations

While publics recognise the potential benefits of drones across different locations, they also recognise a wide range of the potential drawbacks or negative impacts. The greatest concerns are around cyber security (85%), the potential for use in criminal activity (81%), and the impacts on animals, such as birds or agricultural animals (80%) and invasion of privacy (79%) [see table 2].

Our findings in relation to concerns around potential negative impacts on agricultural animals, birds and habitats also suggest that these concerns are not grounded in a simplistic 'NIMBYist' (not in my backyard) attitude. Around two-thirds of respondents expressed concern across urban, suburban and rural locations. Concern about habitat destruction was slightly higher in urban (67%), suburban (67%) and rural (70%) locations than concern about impacts on agricultural animals and birds (62%, 59% and 67%, respectively). This relatively consistent pattern across locations suggests that these concerns extend beyond respondents' immediate locality and may reflect broader UK publics' concerns surrounding environmental conservation and animal welfare. However, it should also be noted that slightly less than 1/3 of respondents indicated they would be comfortable living near a drone hub (29%), and about 1/3 indicated they would be comfortable with having drones flying over their home or street (33%)³.

Table 2: UK public level of concern in relation to perceived drawbacks of drones

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

Table 2 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. 1) Very concerned 2) Somewhat concerned 3) Not very concerned 4) Not at all concerned 5) Don't Know [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

³ Survey Question: Please indicate how comfortable or uncomfortable you would be with each of the following: a) Having drones flying over your home or street, b) Living near a drone hub. 1) Very comfortable 2) Somewhat comfortable 3) Not very comfortable 4) Not at all comfortable 5) Don't know [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

Invasion of privacy was of significant concern in both our survey (79%) and qualitative research. When asked specifically about data recording that may be undertaken by drones and eVTOLs, 61% of respondents indicated they would be concerned about data being collected by cameras for navigation or logging flights (net unconcerned 28%).⁴

Notably, noise has not been the top concern across our qualitative and quantitative data collection. In our survey data concerns about visual pollution, or the risk of crowded skies, are seen as a concern by more respondents than noise pollution. Again, these concerns are not always clear cut, with nearly two-thirds concerned about noise pollution from drones (62%), whilst over half of the same survey respondents (55%)⁵ see a benefit of drone use as a reduction in noise pollution, which maps onto expectations about the potential for reduction of on-ground traffic. However, our research also shows that publics aren't clear about who or how they may raise wider concerns about drones use to or with (see section 4 below). Given there are currently limited routes for publics to raise any concerns and that traditionally aviation complaints have centred on noise, there is a risk that noise will in places become a proxy complaint for other wider concerns.

Though our South West regional case study identified strong support for environmental monitoring drones, this support came with several caveats. Sentiments expressed echoed those identified at the national level and included concerns about invasions of privacy, noise and visual pollution, impacts on wildlife and implications for workers in specific sectors. Local publics and key stakeholders also raised concerns linked to their specific region or special interests they held. For example, general aviation pilots we spoke to were concerned about safe integration of drones into airspace they use for leisure. Whilst parish councillors recognised potential benefits for the areas they represented, they stressed the need for clear and transparent communication about drone use in their communities. Farming representatives were concerned about privacy implications from overflight of private land, as well as impacts on agricultural buildings, land or animals in the event of collisions. Finally, tourism representatives had concerns over the potential for drone use to reduce the appeal of rural areas of outstanding natural beauty, reducing potential visitor numbers with knock-on effects for their industry.

⁴ Net Concerned, Survey Question: Drones and eVTOLs would need to record flight data during flight (e.g. for navigation or logging flights). This could include cameras that are filming their immediate external environment. Considering this, please indicate to what extent you would be concerned or unconcerned about data handling about flights by the companies operating drones and eVTOLs. Scale: Very Concerned, Somewhat Concerned, Not Very Concerned, Not at all Concerned, Don't Know [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

⁵ See Figure 1

4. Trade Offs, Relative Benefits and Drawbacks

Our quantitative and qualitative research has shown that UK publics take very considered and nuanced views of potential BVLOS drone operations, not only acknowledging the drawbacks, or the benefits, but weighing them against each other. For example, in our survey the majority of UK publics see the potential benefits of BVLOS drone use as outweighing the potential drawbacks (68%)⁶. However, when we looked at this alongside those who identified one or more beneficial use case across different regions (see table 1), 22% of that group nonetheless felt that overall the benefits did not outweigh the drawbacks. Therefore, publics acknowledging benefits in one or more use case should not be seen as tacit support for any or all use cases.

Our Wales regional case study also highlighted that publics acknowledge a degree of inevitability whereby increased usage of societally beneficial use cases of BVLOS drones may be accompanied by a much more widespread roll out of use cases across the public and commercial sectors. In this scenario, our research participants sought, without prompting, to evaluate the trade-offs between use cases, exploring together two scenarios; a) having beneficial drone uses alongside uses that were viewed more negatively or b) no drone use at all. This discussion highlighted that when linked to concerns about privacy, visual congestion, noise pollution, and safety, the considerations publics make regarding an 'all-or-nothing' scenario may lead to support for the most beneficial use cases being undermined.

Building on this, a further strand of our qualitative research explored how UK publics reason about beyond visual line of sight (BVLOS) drone operations across use cases. Six focus groups examined three BVLOS use cases - medical deliveries, police operations, and commercial package delivery - not only as individual applications but as parts of an emerging shared drone system.⁷ Across all six groups, participants produced a stable medical > police > commercial hierarchy of acceptability, underpinned by a consistent evaluative logic: whether a use case met a genuine social need, whether its benefits outweighed its disbenefits, and whether the institution deploying it was trustworthy and subject to adequate oversight. Medical use was strongly endorsed on all three counts; police use was broadly supported for targeted applications (such as search and rescue) but raised significant concern around general surveillance and accountability; and commercial delivery was the most contested, frequently seen as failing to meet a genuine need, particularly in urban contexts where alternatives already exist.

A key contribution of this work was testing how publics respond when asked to weigh these use cases against one another as a connected system rather than in isolation, directly interrogating the "drones for good" narrative that currently shapes some of industry, public or third sector

⁶ Survey Question: Considering the potential benefits and potential drawbacks of non-passenger carrying drones, which of the following statements comes closest to your view? 1) The potential benefits outweigh the potential drawbacks 2) The potential drawbacks outweigh the potential benefits [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

⁷ This research is drawn from six focus groups conducted in March 2026, involving 34 participants from across England and Wales. Groups were organised by area type, covering city centres, outer urban areas, town and small city centres, outer town areas, village and rural areas, and remote rural areas. Recruitment aimed for a sample frame with a mix of age, gender and ethnicity broadly representative of the UK population. Focus groups were conducted online via Zoom and lasted approximately 90 minutes each, with two University of Birmingham researchers facilitating.

communications around drones, which assumes that support for beneficial applications will generalise into broader acceptance of drone technologies, systems or services. Our qualitative research suggests that this assumption does not hold reliably. Three distinct positions emerged – refusal, conditional acceptance and inevitability - when participants were asked whether they would accept a less desirable use case (commercial delivery) as the price of a more desirable one (medical delivery) sharing the same airspace and regulatory system. Some participants refused the trade-off outright, with the presence of commercial use undermining their acceptance of the system as a whole, even where they strongly supported medical use. Others offered conditional acceptance, contingent on measures subordinating commercial operations to socially beneficial ones (e.g. licensing conditions or prioritised airspace for medical drones). A third group regarded commercial rollout as inevitable, shifting their focus from whether it should happen to how its worst effects might be mitigated. Across all three positions, and across all six groups, participants raised a consistent concern about the absence of genuine public consultation to date, alongside a clear appetite for meaningful engagement - an opportunity that current rollout timelines mean is closing quickly.

5. Trust and Accountability

Our research shows the need for more, better and meaningful public engagement, democratic oversight and consultation. Given this, open and transparent communication alongside clear guiderails and accountability for a range of potential issues and concerns will be vital for building public confidence around BVLOS drone technologies, systems and services. It is important to know who is more likely to be seen as reliable in this endeavour and who members of the public are likely to approach with any concerns or questions.

Our survey shows that public awareness of the role of the Civil Aviation Authority (CAA) is relatively high (74%)⁸, as is trust in their role in ensuring safety (65% -see figure 2). As table 2 shows around three-quarters of respondents were concerned about technological safety of these aircraft (74%). Respondents were also asked which of a range of measures should be taken that would help them feel these technologies are safe. The most common response was the technologies receiving UK regulatory approval from the CAA (65%), followed by the technologies being compliant with internationally recognised standards (58%), and new UK laws on the technologies (52%). [Figure 2]

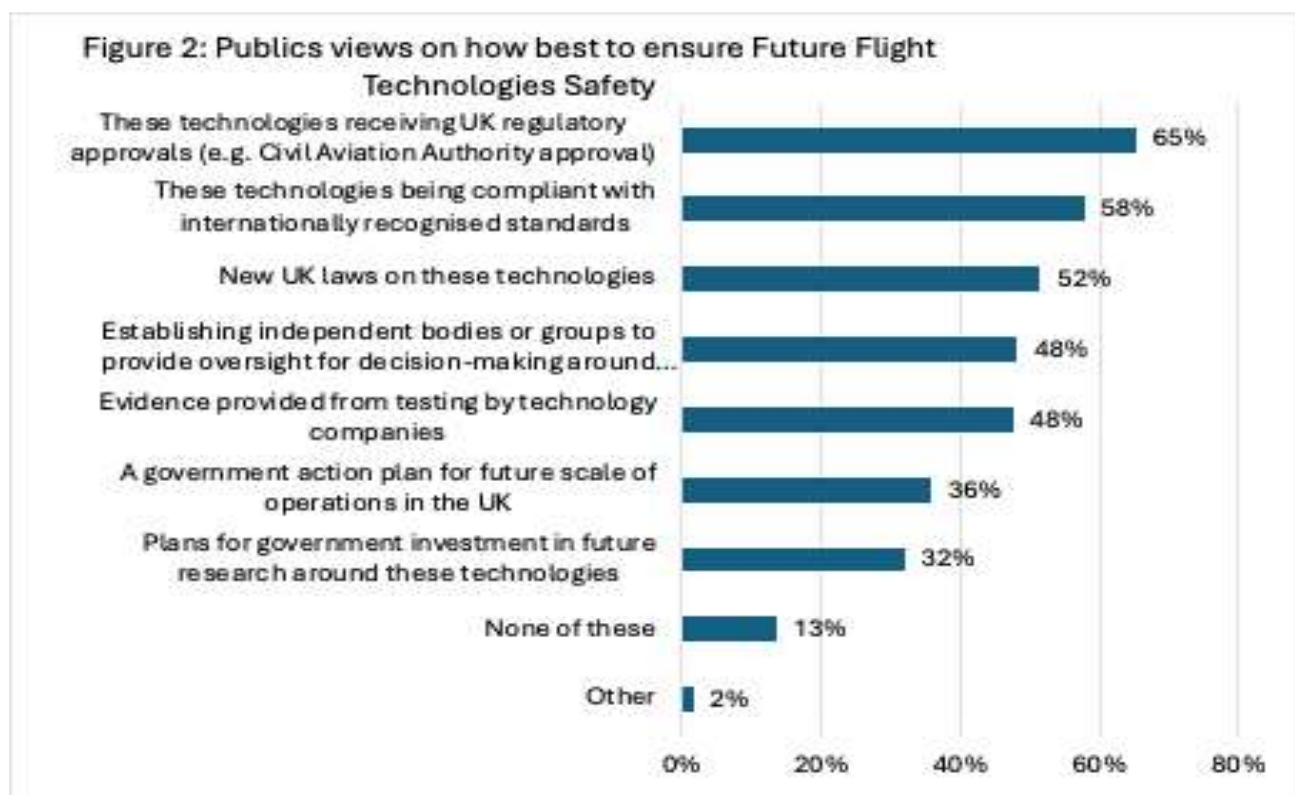


Figure 2 Survey Question: If the future flight technologies discussed in this survey are used for commercial services and scaled up within the UK, there are a number of different steps which may be taken to ensure these new technologies are safe (e.g. government policies, regulations, international standards). With this in mind, please indicate which, if any, of the following would make you feel that future flight technologies are safe. Please select all that apply. [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

⁸ Survey Question: Have you heard of the Civil Aviation Authority (CAA)? Yes/No [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

However, our qualitative work shows that there are a range of oversight structures that are needed, some of which sit outside of the CAA's current remit, others that may be responsibilities of other regulators (e.g. data protection), and some potentially falling between the remits of more than one regulator or for which there are currently no formalised oversight mechanisms.

For example, our Wales case showed that publics have concerns about data safety and security if private companies were to be responsible for operating medical drones on behalf of the NHS. Coordination is therefore required between regulators including the Civil Aviation Authority, the Information Commissioner's Office (ICO), as well as the Medicines and Healthcare products Regulatory Agency (MHRA), to coordinate and ensure safeguards are in place and are well-communicated.

Another clear candidate here is further independent oversight and regulation of police use of drones. Public dialogue participants were particularly concerned to see proactive governance of police BVLOS drone use ahead of their widespread and routine adoption.⁹ Without this robust, transparent and independent oversight to ensure accountability and sufficient safeguards over police drone use, particularly for applications such as surveillance, public support for police use of drones was significantly reduced. A little over 4 in 5 of our survey respondents (81%) considered it important for independent oversight of drones use for surveillance (e.g. by police or private security services) to be established¹⁰.

When asked who they would go to with questions about drones (see figure 3), government departments, such as the Department for Transport (35%) were the most likely to be selected, followed by Aviation regulatory bodies (31%). Local MPs were also selected by a quarter of respondents (25%), while 26% selected 'none of these'. This suggests that there are particular organisations that publics may see as potential key sources of information or as having some responsibility for, and ability to act on, the development and use of these technologies. However, there is no single body or point of contact for publics to address their questions or concerns to. The proportion of respondents selecting 'none of these' (1 in 4) and social media or traditional media (1 in 5) is notable, suggesting that a significant minority may not see the organisations listed as appropriate or trustworthy sources of information about these technologies. Ongoing use case specific research suggests that different organisations will likely be trusted or approached in nuanced and context specific ways, and that as scale up grows it may be local government structures (e.g. borough councils, combined authorities etc) that are most likely to be contacted by publics. This is an important consideration for communication and public engagement as drone use develops.

When it comes to the impact of technological developments on society, it is important to recognise that publics' trust in information will vary dependent on the source from which the information

⁹ Fern Elsdon-Baker et al., Navigating Future Flight: Societal Principles for Drones and Advanced Air Mobility in the UK (University of Birmingham, 2025), 5, <https://futureflightssocial.ac.uk/research/title-23/>.

¹⁰ Survey Question: How important or unimportant do you think the following are in relation to the operations of Future Flight Technologies, systems, and related services? a) Establishment of independent oversight of drone use for surveillance (e.g. by police or private security services). 1) Not important at all 2) Somewhat unimportant 3) Neutral 4) Somewhat important 5) Very important [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

comes. Our survey also asked respondents how reliable they considered different categories of people and organisations to be in accurately explaining the impact of technological developments on society.¹¹ Researchers working at UK universities were seen as the most reliable source by a clear margin, with 75% of respondents rating them as reliable, ahead of researchers undertaking government research (61%), environmental protection organisations (61%), and consumer organisations (58%). Researchers working in industrial or privately funded research organisations were rated somewhat lower (53%), while civil servants and government officials excluding politicians (47%), industry and private companies (41%), and journalists (40%) fell further down the ranking. Local government councillors (31%) and national government politicians (27%) were seen as the least reliable sources.

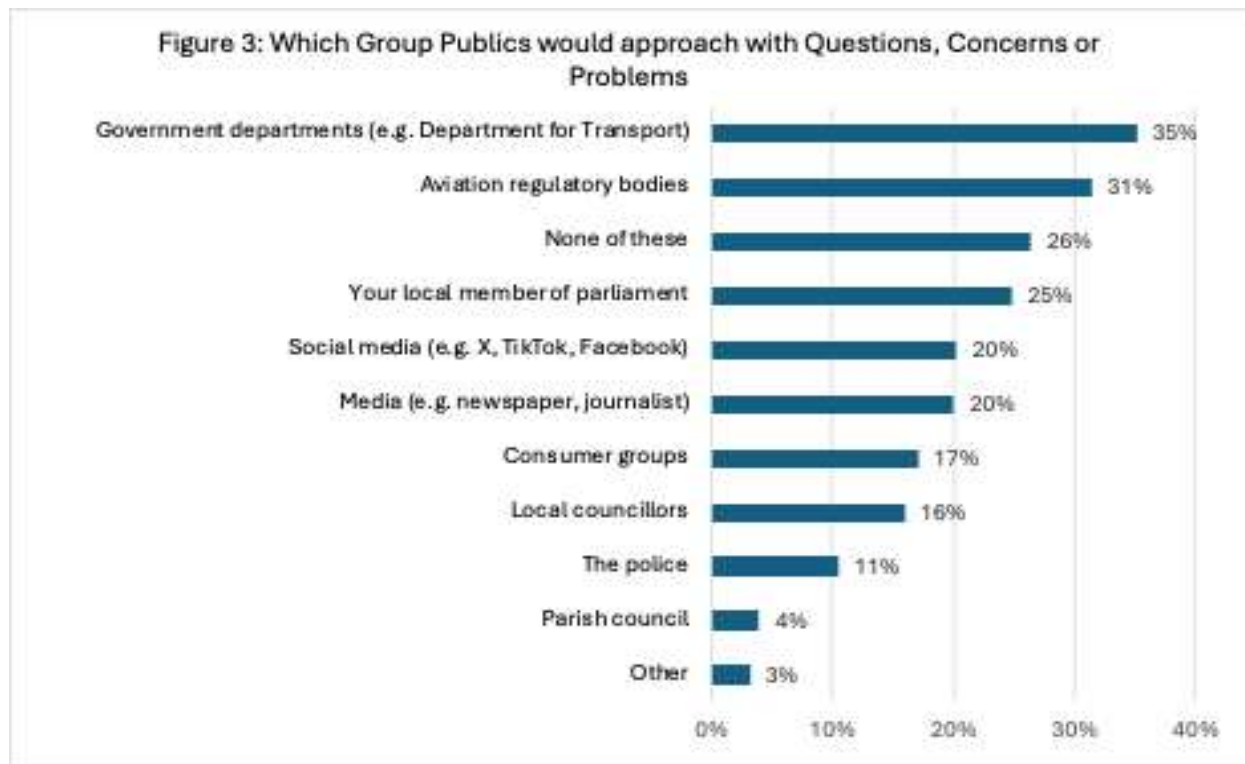


Figure 3 Survey Question: Please indicate which of the following groups you would go to if you had any questions, concerns, or problems around the future flight technologies described previously (drones and eVTOLs). [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

This ordering is notable: it suggests that publics place greatest trust in independent, university-based expertise, above both government and commercial sources, and considerably above elected representatives. This has a direct bearing on the communications and oversight challenges outlined above: as the range of oversight structures needed to govern BVLOS drone use expands beyond the CAA's remit, university researchers are well placed to play a trusted, convening role in explaining impacts and mediating public concerns. It is also worth noting that this report itself is the product

¹¹ 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? Please answer on a scale from very reliable to not at all reliable. [UK Base n=3588, age 18+, nationally representative, data collected Dec '24-Jan'25]

of independent academic research and public engagement undertaken by university social scientists, feeding directly into policy development. Given the trust publics place in this kind of independent research, this approach to evidence-gathering and engagement is likely to be one that publics would recognise and value moving forward.

Overall, our findings point to a clear practical need: clear routes for communication and engagement as well as transparency and accountability across a range of issues and concerns. However, no single existing body or organisation currently holds the full trust or remit required to oversee BVLOS drone use end-to-end, and closing that gap will depend on coordination between regulators, local and national government, sustained investment in independent research, and continued public engagement as drone technologies, systems and services scale up.

6. Summary and Recommendations

Across our quantitative and qualitative research, UK publics are, overall, supportive of BVLOS drone operations. Majorities recognise clear benefits across a range of use cases, particularly in emergency services, medical delivery, environmental monitoring, and improving access to services in isolated and remote communities. However, this support is neither unconditional nor uniform. Publics consistently weigh perceived benefits against a substantial set of drawbacks and risks — including cyber security, criminal misuse, privacy invasion, and impacts on animals and habitats — and this weighing process becomes more complex, not less, once use cases are considered together as part of a single emerging drone system rather than in isolation. Support for one beneficial use case cannot be read as tacit support for drone rollout more broadly: a meaningful proportion of the public who see clear benefits in specific applications nonetheless judge that overall benefits do not outweigh drawbacks, and our qualitative work shows that association with less trusted or less clearly necessary use cases (such as

some commercial delivery applications) can actively undermine support for the system as a whole, even among those who strongly back medical or emergency use. Location, age and regional context further shape these judgements in ways that resist simple assumptions - rural and remote communities are often, but not always, more supportive of specific applications than urban ones, and perceptions of benefit vary by age in ways that are themselves place-contingent.

What emerges from this body of research undertaken over a 5-year period is a nuanced picture of a range of publics that are engaged, discerning, and willing to support BVLOS drone integration - provided that integration is transparent, proportionate, genuinely accountable, and developed with rather than simply for (or indeed against the desires of) the communities it will affect. The window to build this trust and establish these structures is open now, while operations are scaling up, but will narrow as BVLOS use becomes routine. On the basis of these findings, we set out five recommendations.

1. **Establish transparent and accountable oversight structures** that enable genuine democratic input into how drone systems and services operate. This has been one of the most consistent findings across our five years of public dialogue and survey research: independent oversight is not a marginal

preference but a foundational condition of public trust in BVLOS drone integration, and appetite for it is both strong and stable over time. No single regulator currently holds the full remit needed to oversee BVLOS drone operations end-to-end: responsibilities are split, and in places absent, across regulatory bodies and organisations. Closing these gaps, and coordinating across them, is essential - particularly for applications that engender questions around consent and legitimacy such as police surveillance use, or in relation to wider privacy concerns, where our research participants have been clear that independent, proactive oversight must precede rather than follow widespread adoption. Meeting this demand does not require a single, universal approach. In many areas it means strengthening coordination, remit and public-facing accountability within and across existing regulatory structures. In others - particularly where BVLOS operations combine an entirely new mode of transport with new forms of data collection or service delivery - existing bodies were not designed to cover the gaps that arise, and new oversight mechanisms or functions may genuinely be needed to fill them. Crucially, oversight structures should not simply inform the public after decisions are made, but create real and meaningful mechanisms through which citizens can shape how systems and services are designed and operated.

2. Communicate clearly and honestly about the full balance of benefits, risks

and drawbacks - as a system, not use case by use case. Publics do not evaluate drone use cases individually; they reason about them as an interconnected system sharing airspace, regulation and public trust. Communications and policy narratives that lead only with the most popular use cases risk being undermined by association with less trusted ones, rather than the reverse. Effective communication must set out realistic, honest accounts of cumulative impacts across the system as a whole - what is gained, what is put at risk or what wider impacts might be, and what is being done to mitigate the latter - rather than relying on a generalised "drones for good" framing.

3. Deliver early and meaningful public engagement that feeds into decisions at both local and national levels. The absence of wider public awareness and consultation to date is a live concern for the public, not a peripheral one, and appetite for involvement is high. Engagement needs to happen early enough to influence real decisions - including where, how and by whom drones are deployed - and to operate at both national and local levels, given that trust, priorities and concerns vary meaningfully by place.

4. Ensure communication and engagement strategies are sensitive to local and demographic context, without treating any community as homogeneous. Perceived benefit and acceptability vary by location (urban, suburban, rural, remote), region, and

age, sometimes in counterintuitive combinations. A single national messaging or engagement strategy is unlikely to work everywhere; approaches need to be adaptable to place-specific priorities and concerns, while avoiding the assumption that geography or demographics alone determine attitudes.

5. Invest in continued, independent research to inform policy and practice as BVLOS operations scale. Independent university research is the most trusted

source of information on the societal impact of new technologies, ahead of government, industry and media sources. Sustained investment in this kind of independent evidence-gathering - of the sort underpinning this report - offers a credible and publicly-valued route for tracking attitudes, surfacing emerging concerns, and supporting the coordinated oversight and engagement described above as drone technologies, systems and services continue to develop.

Future Flight Social Insight.

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