

Drones Industry Action Group (DIAG)

Industrial Perception Strategy

Agenda

- Introduction to the Drones Industry Action Group
- Perception Working Group
 - Working group objectives
 - Team
 - PwC survey
 - Industry perception
 - Actions

Drones Industry Action Group

- In 2016, BEIS Secretary of State invited Professor Iain Gray as Chair to convene a broad range of business voices (including R&D and academia) to inform, support and shape the business environment facing companies in this sector
- The Drone IAG brings together leading UK drone companies, regulators and academics and is attended by the UK regulator (Civil Aviation Authority), the Department for Business, Energy & Industrial Strategy and the Department for Transport.
- It is the primary collaborative forum between Government and industry and aims to take actions that **drive the growth of the UK Drone Economy**
- Impartial, open mechanism to exchange information between the sector and government, to complement the formal consultation approaches and daily CAA contact with companies. To date, has helped to build understanding and momentum within government
- Current Drone IAG working groups
 - Operating Safety Cases – To develop possible improvements to the CAA's current OSC risk assessment procedure
 - DevSpace – To propose solutions to the challenges of testing novel or complex applications
 - **Public and commercial perceptions** – To consider handling issues around public attitudes and routes to increased awareness of drone services in relevant sectors
- A comprehensive repository of information of the multiple issues across the sector over the past 3 years can be found at <https://www.arpas.uk/drone-iag/>

DIAG

Perception Working Group

- The DIAG exists to accelerate the growth of the UK Drone Economy
- Why the Perception Working Group?
 - To address industrial perception and understanding of drone applications, factors which the DIAG considers could limit the growth of the UK Drone economy
- What can we do about perception?
 - Deploy the working group strategy to educate industries with growth potential
- What do we need from you?
 - As you will see on the next slides, we have quite some in-kind commitment to execute this strategy
 - We have financial commitments from government but, to launch the initiative, we need a little more industry backing
 - To give a sense of scale, Iain Gray (DIAG Chair and Director of Aerospace @ Cranfield) has committed £5K
- What will you get out of it?
 - Expanded market opportunity if we get the industrial messaging and channels right
 - Potential vehicle for your company's case studies
 - Visibility within government

Background

- The DIAG achieved a consensus on perception – it considered that improved industry perception was fundamental to the growth of the UK drone economy
- The results of the PwC survey indicate that the proposed DIAG perception working group strategy addresses the appropriate areas
- The DIAG should act as a repository and distribution mechanism for “drones for good” campaigns, aimed at industry groups
 - Whilst the group believes that such case studies may be obtained, assessed and prioritised at no cost by the group and that group members will be willing to be the “face” of such stories if appropriate, a level of funding is required
 - Funding is key to ensure that the messaging and distribution is effective and may include items such as website design and maintenance, PR firm engagement to write press and distribute to traditional and social media. A level of marketing support will be provided by CPC
 - Government has indicated a willingness to match fund, industry has contributed c.£15K in kind (to date, with further anticipated) with a further £8K pledged should the initiative go ahead – [we need more industry support to reach the £50K target for 1 campaign/ month over 10 months](#)
- This document states the working group objectives, feeds in the results of the PwC survey and suggests next actions

Working Group Objectives

- Facilitate the growth of the UK drone economy by engaging with industry sectors that will benefit from drone-based solutions and deploying actions to improve awareness and accelerate the adoption of DroneTech

Team

- Craig Roberts – PwC – lead
- Graham Brown – ARPAS
- Simon Ritterband – Moonrock
- Ian Williams-Wynn – Blue Bear
- Ajay Modha – CPC
- Oliver Kirkby - CPC
- Rikke Carmichael – Network Rail
- Phil Tarry – Halo Drones
- Kathy Nothstine – Nesta
- Stuart McGlynn - Cyberhawk

PwC Survey Details

- Survey fieldwork
 - 18th to 25th April 2019
- Sample
 - 252 senior industry decision makers in sectors likely to see increased drone usage
- Funded and led by PwC with inputs into the survey questions from the DIAG Perception Working Group

PwC Survey Highlights

- Industry
 - Drone use cases not articulated and drone service providers not credible
 - Drones not used effectively by industry...but those who already use drones think they are effective, implying that the issue is perception

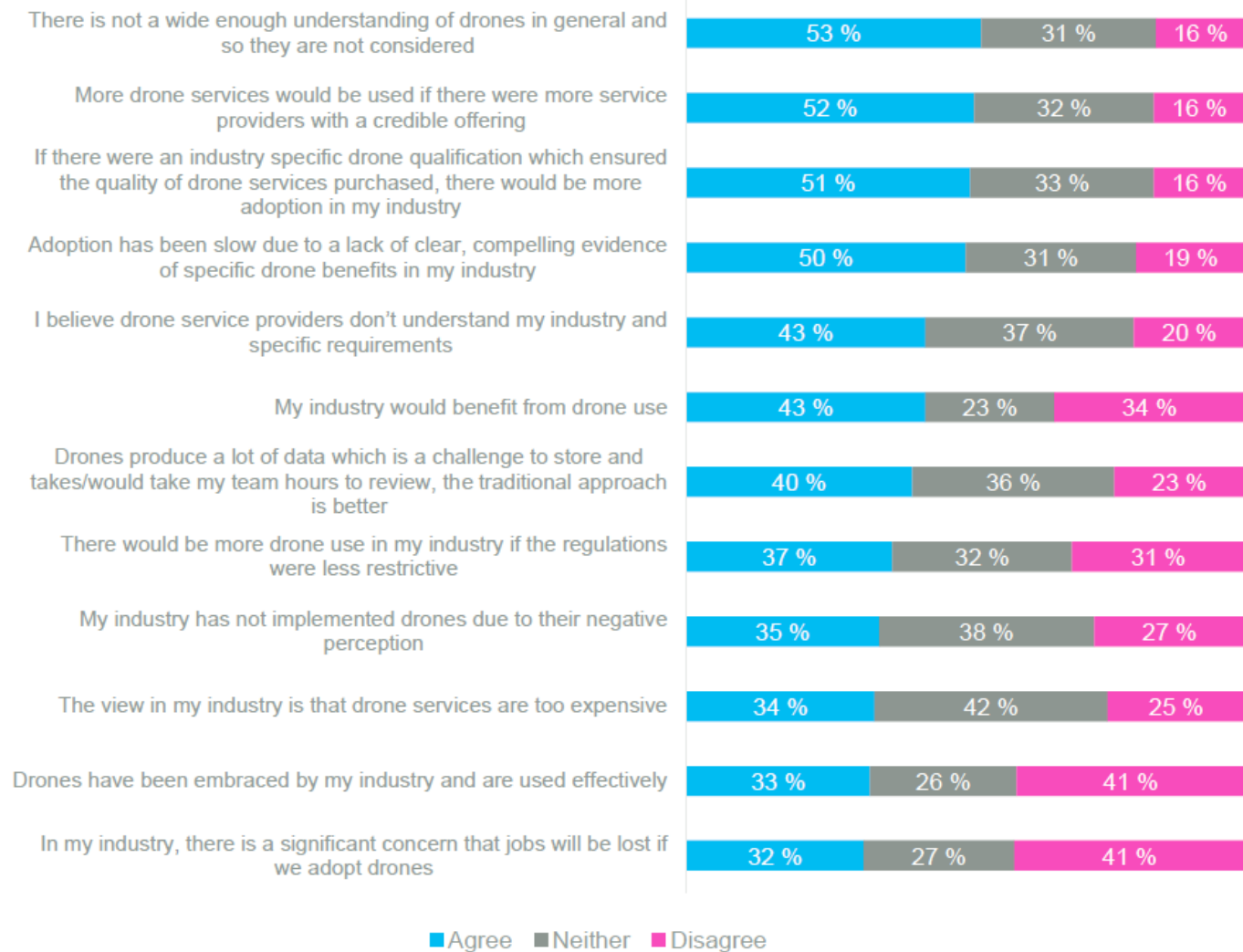
We'll break this down further in the next sections

Industry Perception

PwC Industry Summary

- Drone use cases not articulated and drone service providers not credible, drones not used effectively by industry but benefits expected...those who already use drones think they are effective, implying that the issue is perception
 - 53% agree that “there is not a wide enough understanding of drones in general and so they are not considered” (16% disagree)
 - 52% agree that “more drone services would be used if there were more service providers with a credible offering” (16% disagree)
 - More than 50% of respondents think that an **industry-specific qualification** would lead to more adoption and that a **lack of clear, compelling evidence of specific benefits** has slowed adoption
 - Only 33% agreed with the statement that “drones have been embraced by my industry and are used effectively” (41% disagree)
 - Among those whose industry already uses drones, every benefit mentioned is seen as beneficial by more than 90%, indicating that those who have already adopted drones are satisfied with the benefits they bring
 - 78% of industry respondents say that saving time will be beneficial, 77% that safety will be beneficial and 76% each agreed that increasing productivity and digital transformation would be beneficial

Industry – Agreement with Statements



Industry Perception Scope

- Drone ecosystem
 - In – Industrial (*inspection and survey – O&G, utilities (incl. water), renewables, rail, construction, mining, transport, nuclear, telecoms, agriculture, etc*), surveillance and security, marine
 - Out – delivery, passenger, counter, emergency response/ search and rescue, media, “touch” applications (powerline stringing, tree planting, etc)
- Target groups (where to aim drone perception messaging)
 - In – industrial sectors that it is reasonable to assume will buy or insource drone services if education improves
 - Out – drone service providers, public services (eg regulatory bodies/ blue light), sectors that will be served by delivery, passenger or counter drone applications

Prioritisation

- To maximise the impact of any perception activities, a prioritisation scoring approach will be used comprising
 - Growth potential
 - Technology available over the time horizon of the project
 - Drone-use maturity

Summary

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Actions

Actions

- **LEVEL 1**

- Confirm initial strategy with DIAG – Craig Roberts, complete
- PwC public and industry perception drone survey questions comments – working group, complete
- Top level funding plan – Craig Roberts/ Gordon Baker, complete
- Issue funding request letter and top level plan to relevant bodies, in and out of the DIAG – Iain Gray/ Gordon Baker/ Craig Roberts, complete
- Last call for funding - Iain Gray/ Gordon Baker
- Appoint a new lead for the working group – Iain Gray

- **LEVEL 2**

- Actions dependent on satisfactory resolution of level 1 action *funding*

Actions – Level 2

- General
 - Working group composition, meeting schedule and governance
 - Detailed resource and funding plan, including KPIs
 - Agree website and PR spec, retain website/ PR resources
- Industry
 - Collate “drones for good” industry case studies in agreed format (including clear numerical benefits such as financial, health and safety improvements and time savings), with permissions
 - Determine market segment prioritisation scoring mechanism and complete a prioritisation table in the agreed format
 - Agree and approach 4 or 5 industry bodies that the group considers offer effective channels to target market segments
 - Build a campaign (10 months, 1 per month)
 - Assesses, select and prioritises case studies based on target market segments and survey feedback
 - Agree KPIs
 - Agree channels (social/ traditional media, campaign approach, public "face" of DIAG? Key relationships?)