# Industry Perception Study - Interviews

PwC recently collaborated with BEIS to conduct a study on how “Industry 1” perceives drones. We are now testing some of the themes that emerged from the study with a small number of stakeholders and would appreciate it if you could share your views by completing the interview questions below. Thank you.

## Background to the study

In 2022, we collaborated with BEIS and DfT to produce a report on the potential impact of drones on the UK economy to 2030, [Skies Without Limits v2.0](https://www.pwc.co.uk/issues/intelligent-digital/the-impact-of-drones-on-the-uk-economy.html). We noted that, to achieve this potential, there were several barriers to overcome. These included Perception, (manner of drone) Implementation, Technology, Regulation and Skills. In the course of writing the Perception section, we referred to our 2019 “[Building Trust in Drones](https://www.pwc.co.uk/issues/intelligent-digital/drones-and-trust.html)” study. We have now refreshed the Industry[[1]](#footnote-2) perception part of the 2019 work to give us an indication of what has changed in the last 3 years.

We would be interested in your reflections on 6 key points that emerged from the study, to determine if they match your own experience with drones and, potentially, to influence actions that will address the issues found. The 6 key points are effective use of drones, drone service provider credibility, drone use case understanding, benefit case, industry specific qualifications and data overload. We may include your responses in our final report, with your job title and company noted, refer to section 7.

*Before completing the main questions, please answer the following about your background:*

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| **Question** | **Answer** |
| Company name |  |
| Respondent name and title |  |
| Market segment(s)/ target market segment(s) – Please select (by ticking) as many as are applicable from the list.  *Note - for drone service providers, target market refers to the market you provide services to or that you aim to provide services to* | Defence  Education  Government and public services  Healthcare (part of the NHS)  Healthcare (not part of the NHS)  Charities/ Trade Unions  Agriculture  Forestry  Mining, quarrying  Upstream oil and gas  Gas and electricity generation [including renewable energies]  Transport and logistics  Rail  Midstream oil and gas  Construction and civil engineering  Aerospace  Downstream oil and gas  Food, drink  Other manufacturing  Media  Telecommunications  IT, Computing and Technology  Financial and Insurance  Legal, accounting and consulting  Marketing, advertising, PR and market research  Security  Hospitality and leisure  Wholesale and retail trade  Real estate  Other – Please State: |
| Tick all of these that apply to you | We are a drone service provider  We have an internal drone team  We purchase drone services from external drone service provider(s)  We do not use drones |
| If you answered “We do not use drones” above, do you plan to use drones in the future? | Yes  No  Please add any comments you consider relevant: |
| Which of these drone applications are relevant in your line of work (please select as many as apply). | Search and rescue  Providing live situational awareness during fires, spills and other emergencies  Police use such as monitoring the streets for illegal activity  Identifying and tracking criminals  Inspection of infrastructure such as oil and gas platforms, wind turbines, telecoms masts, electricity pylons  Assessment of transport infrastructure such as railways, roads and bridges  Using drone data to assess crop health in agriculture  Mapping construction sites to track progress on large projects  Calculating the volume of stockpiles, e.g. coal  Professional photography or journalism  Delivering small to mid-sized retail packages to homes  Delivering medical aid to individuals, homes or businesses  Transferring medical supplies between hospitals (e.g. organ transplants)  Drones acting as flying taxis transporting individual people  Acting as air-ambulances transporting individual patients  Other – Please state: |

*Below are a series of themes that have been identified in our refreshed Industry Perception Study. Please read through each theme and answer the questions that follow.*

1. **Effective use of drones**

More than 80% of respondents expect drones to be beneficial in the areas of safety, cost, time, productivity, digital transformation, carbon reduction, meeting skills shortages. However, despite this, only 43% agree that “**Drones have been embraced by my industry and are used effectively**”. This is an increase over the 33% we reported in 2019 but may still be considered low in an absolute sense, given the strong support of the benefits of drones.

1. What do you think about the notion that more than 40% of your industry/ target industry has embraced drones and are using them effectively?

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1. What does a 10% increase in the effective use of drones over the last 3 years make you think?

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1. What do you think might be the reasons why a significant proportion of industry does not appear to be using drones effectively?

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1. **Service provider credibility**

63% of respondents agree that “**More drone services would be used if there were more service providers with a credible offering**”.

1. What are your thoughts about this implied lack of drone service provider credibility?

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1. How would you say this matches your experience (give examples if possible)?

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1. In your opinion, what would help to increase credibility in the industry?

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1. **Drone use case understanding**

57% of respondents agree that “**There is not a wide enough understanding of drones in general and so they are not considered**”

1. Do you have any comments on this lack of understanding of drones?

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1. Please share any examples of where a lack of understanding of drones has prevented drone adoption.

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1. Do you have any thoughts about how the understanding of drones could be increased? Please share examples of successfully increasing understanding.

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1. **Benefit case**

59% of respondents agree that “**Adoption has been slow due to a lack of clear, compelling evidence of specific drone benefits in my industry**”

1. What are your thoughts on the idea that there are a lack of compelling benefit cases for drones?

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1. Please share any examples of where a lack of a compelling evidence of drone benefits has prevented drone adoption or compelling evidence of drone benefits has accelerated drone adoption.

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1. **Industry-specific qualification**

56% of respondents agree that “**If there were an industry specific drone qualification which ensured the quality of drone services purchased, there would be more adoption in my industry**”

1. How do you feel about this?

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1. What are your thoughts on whether an industry-specific drone qualification would increase service provider credibility? (question 2).

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1. **Data overload**

67% of the respondents that work for organisations that use drones agree that **“Drones produce a lot of data which is a challenge to store and takes/would take my team hours to review, the traditional approach is better”**

1. Do you have any thoughts about this?

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1. If drone data is (or was) a challenge for you, please share how you plan to address (or managed to address) this issue

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1. **Closing questions**
2. Do you think that more drones should be used in your industry/ target industry?

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1. If so, what are the top 3 actions you would take to address this and why do you think these would be effective? Please be as specific as possible in how your suggestions would work.

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1. Is there anything else you would like to share on adoption of drones by industry?

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1. **Finally, please confirm that you have read and accept the two statements below:**
2. The UK Government has helped fund this work and you agree that they can use your statements in other materials, at their discretion
3. You agree that quotes from your responses may be included in the final report, along with your company name and job title

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| Signed: |
| Name: |
| Date: |

If you would prefer your responses to remain anonymous, please make this clear in your email response. Note – if this form is not signed but you have replied with a filled-in form and not stated that you want to remain anonymous, we will assume that you meant to sign the form and may include your responses in your report.

1. “Industry” refers to public and private sector entities who may, for example, purchase or provide drone services. We surveyed 251 individuals from across UK Industry, including the public sector (20% of the sample) and private sector. [↑](#footnote-ref-2)