



***How Americans View
Drone Safety and Privacy
and Why That Information
is Vital to Understanding
the American Drone Market***

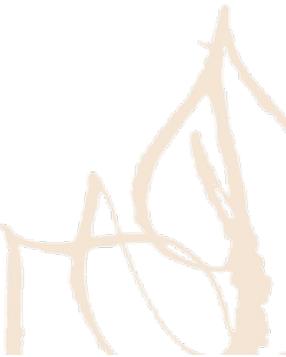


**A Hawthorn Group Visit With
The European UCA Conference**

December 4, 2019

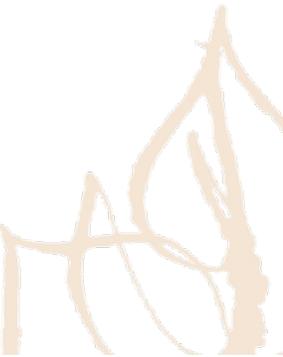
Today's Agenda

- I. How Americans View Drone Safety**
- II. Why That is Important**



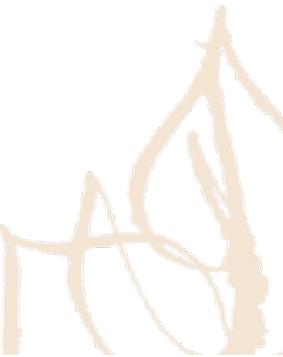
Custom Drone Poll

- **November 17-19**
- **801 Interviews**
- **58% Landline, 42% Mobile**
- **Registered Voters**
- **Margin of Error: $e = +/- 3$ points**



Key Findings – Good News (Mostly)

- **80% aware:** recently read, seen, heard
- **Despite serious safety concerns, drones are 58% good idea; 42% not**
- **51% support neighborhood deliveries; 49% too dangerous**
- **70% expect home delivery 5-10 years 30% do not**



Key Findings – Bad News

- **Safety and drones**

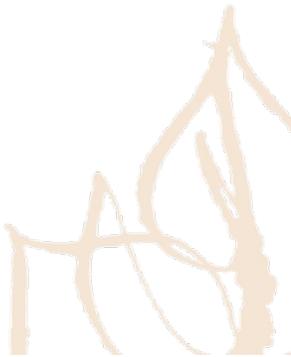
- **20% extremely concerned**
- **48% somewhat concerned**
- **25% not very concerned**
- **7% not at all concerned**

68%

32%

- **Main reason for concern**

- **48% people**
- **43% passenger planes and other aircraft**
- **10% buildings and property**

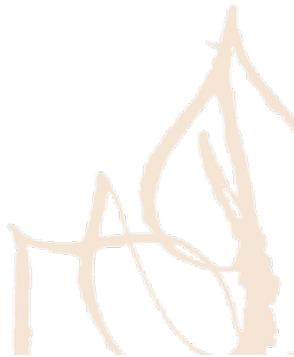


Key Findings – More Good News

- **Safe for commercial use in and over communities and neighborhoods**
 - 15% strongly believe
 - 53% somewhat believe
 - 24% somewhat do not believe
 - 8% strongly do not believe

68%

32%

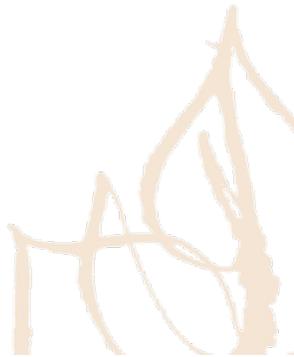


Key Findings – More Bad News

- **Commercial drones used for small scale and cargo deliveries will cause a serious accident sooner or later**
 - 37% strongly believe
 - 45% somewhat believe
 - 15% somewhat do not believe
 - 3% strongly do not believe
- **71% concerned about privacy; 29% not**

82%

18%

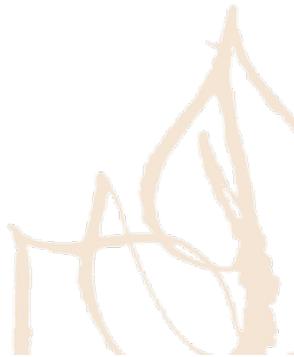


Key Findings

- **48% heavily regulated;**
45% lightly regulated
7% not regulated
- **34% Federal Government**
31% State Governments
12% Industry self-regulation
23% All of the Above

93%

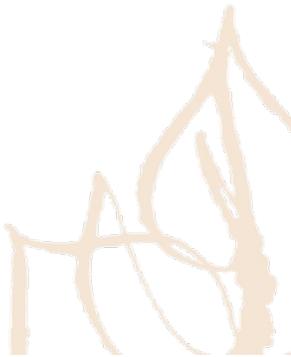
7%



Additional Data – 536 Online Interviews 11/25;

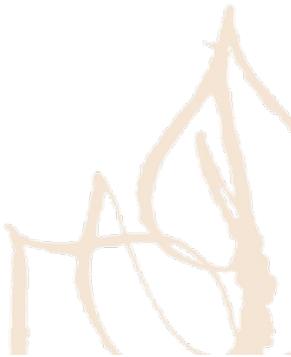
e = +/- 4 points

- **Awareness of increasing news coverage of drones:**
89.3% Yes, 10.7% No
- **If violate law by getting too close to airports TSA should have authority to shoot down:**
86.6% Yes, 13.4% No
- **If immediate risk to public safety, law enforcement authorized to shoot down:**
93.7% Yes, 6.3% No



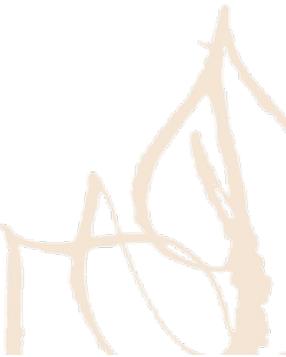
Additional Data – 536 Online Interviews 11/25

- **Concern about security with Chinese manufacturer valid:**
83% Yes, 17% No
- **Chinese-made drones should be banned from U.S. government agencies:**
71.3% Yes, 28.7% No
- **Chinese-made drones should be banned from U.S. businesses and individuals:**
54.7% Yes, 45.3% No



American Markets

- **Business Opportunity/Performance**
- **Government Interference**
 - **Taxes** (burden and/or incentives)
 - **Legislation and Regulation** (access, location, qualification, licensing, operations, security, liability . . . all subject to **Litigation**)
 - **Federal, State, and/or Local** [city, county, regional]



American Markets

- **Policy Driven by**
 - **Politics**
 - **Media (news and social)**
 - **Public Opinion**
- **Fueled by**
 - **Incidents** (real, rumor, and/or fake)
 - **Opposition** (commercial, NIMBY and/or ideological)
 - **Advocates and Allies**





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