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THE POLITICS OF THE DRONE ECONOMY

HOW THE UK PUBLIC VIEW DRONES AND WHAT IT
MEANS FOR GOVERNMENT AND INDUSTRY

MARCH 2026

TAKEAWAYS:

Public Servants Not Consumer Services:

While autonomous technology may be technically ready for civilian use, public acceptance is lagging behind. The public want the government to step in and increase support for drones in the military, police and border control. Meanwhile they also want the government to impede the rollout of driverless taxis and drones for online deliveries.

Silver Supporters - Inaction Isn't An Option:

Support for drones increases with age. Those past retirement age are over three times as likely to support drones as those just entering the workforce. Industry will need to make a stronger case for the value of drones to younger audiences as they become politically active, otherwise drones risk remaining a peripheral technology for some time.

The Green - Reform Alliance:

The application of drones is one of the few policy areas on which Reform UK, Conservative, Liberal Democrat, Labour and Green Party voters broadly agree. All voter groups want to see the government deploy drones for public services while regulating commercial drones out of the market.

THE NEW AGE OF DRONES

The world is becoming a more dangerous place. Realpolitik is taking hold, and global powers are competing for dominance. There is an ever-present fear of regional wars escalating into a global conflict. Novel aircraft are threatening to change how war is conducted and there is a real concern that British skies are unprotected from this new threat.

This is the context in which the first drone was invented by Archibald Low in 1916.

While drones have been around for a hundred years, recent advances in technology have fundamentally changed how policymakers need to think about their deployment, strategic importance, and the regulatory framework surrounding them. The military and civilian potential of drones has expanded dramatically, creating a wide range of use cases that were not available even ten years ago. Each of these brings challenges but also opportunities, and countries that seize these opportunities will leave those that don't behind.

The military applications of drones, and the need for defences against them, are becoming self-evident in Ukraine and the Middle East, as well as through suspected Russian drone activity in Europe. Meanwhile, civilian applications are beginning to reach the market, most recently in the UK with driverless taxis and pilot schemes for drone deliveries.

The novelty of the technologies has caught policymakers cold. Existing regulatory mechanisms were not designed with autonomous vehicles in mind, and this environment is stifling their development and deployment. To make the

most of the opportunity in front of us, the UK government needs to provide better regulation and support investment. For the UK government to do so, there needs to be clear political will.

Despite the geopolitical situation, real-terms defence spending is proving difficult to deliver. Despite pledges to increase defence spending and pressure from the USA, there is not yet a clear plan to deliver this in the UK. The specific application of drones within this is even further away, despite their prominence on the battlefield. While the need to invest in drones and drone defences is becoming clear academically, the political will is not aligned. It may require a political or security crisis to spur government into action.

Civilian drone adoption will not have a crisis moment and is therefore more dependent on voter pressure for legislative change. Full deployment will depend on commercial organisations winning over the public and persuading politicians to improve regulation and increase investment. This will not be simple, as the Overton window on drone use does not currently include commercial use for most voters.

Public support will be crucial to the successful adoption of drone technology in the UK. In this report, we investigate a selection of drone use cases to understand where public support already exists, where it needs to be built, and the political challenges that may emerge along the way.



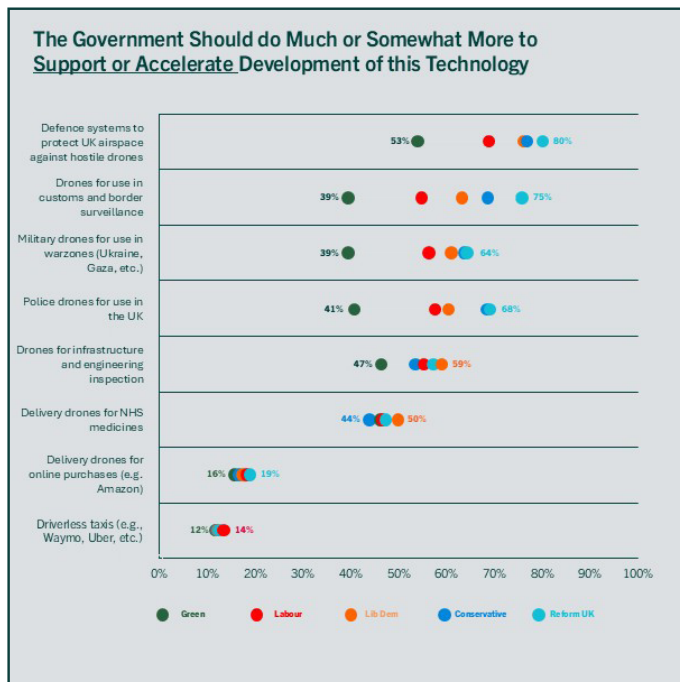
UNIVERSAL REJECTION AND UNEVEN SUPPORT

The application of drones is one of the few policy areas on which Reform UK, Conservative, Lib Dem, Labour and Green Party voters broadly agree. Driverless taxis and deliveries are consistently unpopular with all voter groups. A range of 35%–41% of each voter group actively opposes delivery drones, and this opposition is stronger for driverless taxis (49%–59%).

Meanwhile, there is middling cross-party support for delivery drones when used for NHS medicines, at just under 50%.

Consensus weakens as the overall level of support increases, but broad agreement remains. The UK Green Party is the biggest outlier, as its voters are consistently less supportive of the use of drones in public services, most notably for warfare and surveillance. However, given the party's historical positions on immigration and NATO, the fact that two-in-five Green Party voters want to see more action on drones in this space is telling.

Indeed, despite these differences, most voters, regardless



of party, prefer support rather than restrictions for these applications.

The overarching story is that there is broad political agreement that the government should do more to get drones into public service. Regardless of the target voter, creating better regulation for drone adoption for public services will be popular.

This should embolden organisations working in this space and hoping to supply drone systems for public services to engage government on deployment.

By contrast, the consensus rejection of driverless taxis and delivery providers presents a significant challenge for organisations looking to enter these markets. Much work remains to win over the British public before politicians support their expansion or consumers adopt the technology.

The time is now to begin this work to move the Overton window on public acceptance as drones are coming to market.



A SIGNAL TO GOVERNMENT, OPPORTUNITY FOR INDUSTRY

The political support for greater use of drones in public services is clear and overwhelming, as is the broad political rejection of their use in everyday commercial applications. This is a clear signal for government to act.

With ongoing pressure from the United States to increase defence spending, drones and drone defences offer a politically popular option for the government. An option that can be leveraged to support civil adoption for public services as well. Policymakers should recognise this opportunity and move quickly to capitalise on it.

There is an expectation across the electorate for the government to do more to get drones into public service. Cost will always be a consideration, but there are regulatory levers available to the government. The current operating environment for drones is stifling the industry, and regulatory changes can improve this with low levels of taxpayer investment. Creating a regulatory environment that supports investment and deployment of drones can stimulate growth.

Companies developing drones for defence and public services should use this moment to push for clearer rules that allow testing, development and deployment. For the civil drone industry, the situation is more difficult.

Civilian applications are developing more slowly, and public support is far weaker. Companies such as Waymo and other providers of autonomous services will need to convince the British public of the value of their services if they are to become viable in the long term. If large parts of the public want government to slow down these technologies, the sector runs the risk of being scapegoated by populist politicians looking for low-risk reactive policy platforms.

However, the situation is not hopeless for the commercial drone industry. There are significant benefits to autonomous commercial vehicles, Waymo reports 90% fewer crashes compared to human drivers, and this story needs to land with the public before the industry can be weaponised politically. If not, it could spell the end of the industry in the UK before it begins.

The opportunities presented by drones are significant, and the UK is at a tipping point to decide whether or not to capitalise on this opportunity. Delaying will only push drone manufactures and operators to other, more favourable markets and allow other countries to steal a march on the UK.

Britain pioneered drones in 1916, and with the right policy choices, it could be a pioneer again.



Methodology

Data provided by Norstat

N=6225 Nationally Representative Poll

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