Quantitative Research on Drone Users Lifestyle and Demographics

Final Report

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This public opinion research report presents the results of an online survey conducted by Leger Marketing Inc. on behalf of Transport Canada. The research was conducted with 700 Canadian drone users between February the 25th and March 6, 2019.

Cette publication est aussi disponible en français sous le titre : Étude quantitative sur le profil démographique et les habitudes des utilisateurs de drones au Canada

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1. Executive Summary

Leger is pleased to present Transport Canada with this report on findings from a quantitative survey designed to learn about Canadians drone users.

This report was prepared by Leger who was contracted by Transport Canada (contract number T8053-180127/001/CY awarded February 7, 2019).

1.1   Background and objectives

Despite exponential growth, the civilian drone sector continues to be in its early stages, and the number of studies and available data on drone users is somewhat limited, particularly in smaller markets like Canada. To properly target the Transport Canada's (TC) communications and awareness efforts, information is needed on drone users, including demographics, as well as related activities they may be involved in, how they purchase and use their drones, and what their understanding of aviation safety is. This research will also support the partnership between Transport Canada and Code for Canada, which will be working over the course of 2018-19 to develop a digital solution for drone safety in Canada.

The results will inform the Civil Aviation Group within Transport Canada of their target audience. The research will also aid the Drone Safety ("Know Before You Go") communications campaign to determine how information, educational tools and resources should be delivered to the drone community. The products this research will inform include educational material, advertising, web content and social media messaging.

Research on drone users will allow TC to:

- Understand the consumer profile of commercial and recreational drone users.
- Examine and gain insight on how aviation safety is understood by users.
- Identify opportunities to deliver and improve messaging, educational tools, and educational material to drone users.
- Support the partnership between Transport Canada and Code for Canada to develop a digital solution for drones in Canada. The partnership will place a heavy emphasis on user-driven work to seek a better understanding of drone pilots and their motivations.
- Results of this research study will help develop and deliver effective drone safety communication products.

1.2 Methodology – Quantitative research

Online survey

This consumer research was conducted via online surveys, using Computer Aided Web Interviewing (CAWI) technology. Fieldwork for the survey was carried out from February 25 to March 6, 2019. A total of 700 Canadian drone users were interviewed.

With the objective of having enough respondents in each category of drone users (recreational/professional; owns a drone/does not own a drone but occasionally flies drone) minimum quotas were set on each of these profiles. We ensured a minimum of 100 respondents corresponding to each of the aforementioned profiles of drone users, which allow us to draw up demographic profiles and compare them.

A pre-test of 20 interviews was completed before launching data collection to validate the programming of the questionnaire.

Since we didn't use an actual probability sampling method, the calculation of the margin of error cannot be done for this project.

Leger adheres to the most stringent guidelines for quantitative research. The survey instrument was compliant with the Standards of Conduct of Government of Canada Public Opinion Research.

A complete methodological description is provided in the Appendix section of this document (please see Appendix A).

Notes to the reader

The cross-tabulations in this report present the detailed responses obtained for the questions in the drone users' survey.

Presented in the "Total" column are the results for all respondents, and then the results per subgroup (for example, by gender, age, drone owners and non-owners, etc.). **Red** (with a - symbol) and **green** (with a + symbol) numbers respectively indicate lower or higher results that are considered statistically significant compared to results obtained for other respondents. Two proportions or two averages are significantly different only when statistical tests confirm this difference.

In the example below, we observe that overall 15% of respondents have a background in aviation. There are significant differences among the type of drone users. Respondents who own their drone(s) (21%) are more likely to have a background in aviation. There are also significant differences among the drone users based on the purpose of drone usage. Recreational respondents are less likely to have a background in aviation (13%). As shown in Table 1, the "non-owner" category refers to people who said that they do fly drones but do not own them. As such, they are drone users, without being owners.

Table 1. Background in aviation by type of drones users

Q27. Do you have a background in aviation (flying lessons, pilot license or anything related)? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	15%	**21%+**	**6%-**
No	80%	**76%-**	**86%+**
DNK / Refusal	5%	**3%-**	**8%+**

Table 2. Background in aviation by drone usage purpose

Q27. Do you have a background in aviation (flying lessons, pilot license or anything related)? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	15%	**13%-**	21%	**28%+**
No	80%	**84%+**	**67%-**	**62%-**
DNK / Refusal	5%	**3%-**	**12%+**	**10%+**

Note: Unweighted n = actual number of respondents surveyed in each sub-group.

1.3 Overview of quantitative findings

Profile and habits of drone users

- Overall, the incidence of drone users on the Canadian population is 17%. This incidence rate includes recreational and/or professional drone users, regardless if they own a drone or not. Three users out of five consider themselves drone owners (61%) and almost four users out of five fly drones for recreational purposes (79%). Only one user out of ten fly drones for work or research purposes (12%), and the same goes for users who fly drones for both recreational and work or research purposes (10%).

- Generally speaking, Ontario residents are more likely to be drone users (18%). Same goes for people who are aged between 18 and 34 (28%) and males (23%). Prior to launching the survey, it was established that drones can be used for two main reasons: recreational purposes and work or research purposes. Results show that people between the age of 55 and 64 are more likely to be recreational users (88%).

- On average, respondents who fly drones for both recreational and work or research purposes stated that they fly their drone 48% of the time for recreational purposes and 37% of the time for work or research purposes.

- A clear majority of respondents do not have any background in aviation. Indeed, when questioned about having a background in aviation, 80% of the respondents said they did not, while only one out of ten respondents said they did (15%). Results show that drone owners are more likely to have a background in aviation (21%) and non-owners[1] are more likely not to have one (86%).

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[1] Non-owners refer to respondents who said they fly a drone but do not own one. This can apply to both recreational and professional drone users.

- Generally speaking, drone users use their drone(s) for less than an hour on a weekly basis (40%). A clear majority of drone owners fly their drone up to 4 hours per week (82%). Respondents who stated they fly drones for both recreational and work or research purposes are more likely to use their drone(s) between 10 and 14 hours per week (12%).

- Recreational users seem to mainly fly their drone(s) just for the fun of flying (64%). Results show that non-owners are less likely to fly their drone just for the fun of flying (52%). At the other end, one out of four professional users said the main reason they fly drones is for filmmaking, videography or photography (25%) and a little over one out of five said it was for research/academic purposes (22%).

- Generally speaking, almost four out of ten respondents say they usually fly their drone(s) in a rural area (37%).

Profile of drone owners

- Drone owners seem to mostly own one drone (68%). Indeed, almost three out of four recreational drone owners own only one drone (74%). On the other hand, three out of ten owners who fly drones for both recreational purposes said they own three drones or more (30%).

- Three quarters of the drone owners bought their drone(s) through a retail store (76%), whether online (27%) or in-store (49%). Half of the recreational owners purchased their drone in-store (53%) and are less likely to have made an online purchase (26%). On the other hand, almost three owners out of ten who fly drones for recreational and work or research purposes bought the drone they fly most often online through a website specializing in drones (29%).

- Surprisingly, almost three drone owners out of ten said they didn't know the make or brand of the drone they fly most often (28%). The most popular brand among the respondents is DJI (16%), followed by Blade (11%) and Parrot (9%). In the same vein, drone owners didn't seem to know the weight of the drone they fly most often. Results show that almost three quarters of the respondents weren't able to give an answer when questioned about the weight of their most used drone (74%). The overall average weight of a drone is 5.8 pounds and the general median is 1 pound. When looking at the answers given by recreational users, the average weight comes down to 3.7 pounds. The complete opposite happens when looking at the answers given by professional users: the average weight goes up to 24.6 pounds.

Clubs, learning techniques, certifications, and safety trainings

- Only 2% of the respondents are part of a drone or model aircraft club, but almost one out of five respondents said they are looking into joining one (18%). A little over three quarters of the recreational users are not part of any drone or model aircraft clubs nor looking to join one (77%).

- More than half of the respondents learned to fly drones on their own/without assistance (54%), almost one out of five was taught by a friend or colleague (18%) and one out of ten learned through instructional videos (YouTube or through a drone company) (11%). Only 4% of the respondents stated they enrolled in a drone-flying class, either online (47%) or in class (e.g. school, community centre) (48%).

- Two respondents out of ten either have a Drone Pilot Certificate issued by the Government of Canada or are in the process of obtaining one (21%). One quarter (25%) of the professional users are in the process of obtaining their certificate and 21% of the users who fly for both recreational and professional purposes already have their certificate. Results show that recreational users are more likely to not have a drone pilot certificate (79%) and professional users are less likely to not have one (48%).

- More than half of the respondents have not received any training or seen any instructional video specifically on safety relative to flying drones or model aircraft in Canada (58%). However, three respondents out of ten have received such training or seen such instructional video (37%). Four out of ten drone owners stated they did receive a training or saw an instructional video specifically on safety relative to flying drones or model aircraft in Canada (44%). Professional users are less likely to be part of those who did not receive any training nor seen any instructional video on drone safety (47%). In the same vein, only one quarter of the respondents have received training or saw an instructional video on Transport Canada's drone safety regulations (25%).

Information sources and regulations

- Generally speaking, more than half of the respondents mentioned they did not search for information on Canadian Government regulations regarding drones or model aircraft (57%). Results show that 43% of drone owners did search to get information on Canadian regulations, while only 28% of the non-owners did. While 63% of recreational users did not conduct such a search, more than half of the respondents who fly drones for work or research purposes did search for information on Canadian government regulations regarding drones or model aircraft at one point or another (52%). Out of all the respondents who stated they searched for information on Canadian government regulations regarding drone and model aircraft, almost seven out of ten conducted a search engine query (68%), almost half visited the Government of Canada website (48%) and one quarter visited TC's website (25%).

- Overall, 57% of the respondents who did not search for information on Canadian government regulations regarding drones or model aircraft directly on TC's website did, however, visit TC's website pages about drones at one point or another. A clear majority of these respondents searched for information about the current rules and regulations (80%), one respondent out of ten was looking for information on how to register their drone (11%) and only 8% were looking for information on how to get a drone pilot certificate.

- Half of the respondents self-evaluate themselves as not knowledgeable with regards to TC's drones and model aircraft regulations (50%). All in all, only 11% of the respondents considered they were "Very knowledgeable." Six respondents who fly drones for both recreational and work or research purposes out of ten consider themselves knowledgeable of the Transport Canada regulations on drones and model aircraft (62%). The best-known rule by recreational users is the one stating that one must fly their drone outside of controlled airspace (74%). As for professional users, half of them are aware that you must apply to TC to obtain a Special Flight Operations Certificate OR be eligible for an exemption if your operation is low-risk (50%).

- Six respondents out of ten weren't aware that there were new drone regulations coming into effect June 1, 2019 (64%). Only 27% were aware and 9% preferred not to say. Of the 27% of respondents who were aware that there were new regulations coming into effect, a good majority does not have a clear understanding of what those regulations will bring. Indeed, when asked to explain in their own words what changes the new regulations will bring, six respondents out of ten said they either didn't know or preferred not to answer (61%). While proportions of "do not know" answers tend to be higher for web surveys (compared to the telephone), an expected level of "do not know" should remain in the 30% range, not 61%. The new rule most of the respondents are aware of is that "You must keep your drone within your visual line of sight" (62%). In general, drone owners and respondents who fly their drones for both recreational and work or research purposes are more likely to be aware of the new rules.

Communication channels

- When it comes to staying informed on the newest trends about drones and model aircraft, two out of ten respondents do so on the internet through a Google search (20%). YouTube channels are also a source of information for 14% of the respondents.

- When asked, respondents believe an advertising campaign on TV is the best medium for TC to reach drone and model aircraft users (26%), followed by social media platforms (20%). Online ads on drone speciality websites is the preferred medium for 23% of the users who fly drones for both recreational and professional purposes.

- Results show that the preferred format to get information regarding safely flying drones in Canada is online videos (46%). Web content is the second preferred format with 23%.

1.4   Notes on interpretation of research findings

The views and observations expressed in this document do not reflect those of Transport Canada. This report was compiled by Leger based on the research conducted specifically for this project. This research is not probabilistic; the results cannot be inferred to the general population of Canada.

1.5 Political neutrality statement and contact information

Leger certifies that the final deliverables fully comply with the Government of Canada's political neutrality requirements outlined in the *Policy on Communications and Federal Identity* and the *Directive on the Management of Communications.*

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed: _____

Christian Bourque, Senior Researcher

Léger

2. Detailed results

2.1 Profiling

As mentioned before, this study is interested in people who fly drones, which include the following:

- Canadians who personally own a drone or other model aircraft that they fly for recreational purposes;

- Canadians who personally own a drone or other model aircraft that they fly for work or research purposes;

- Canadians who do not own a drone or other model aircraft but fly them for recreational purposes;

- Canadians who do not own a drone or other model aircraft but fly them for work or research purposes;

- Canadians who personally own a drone or other model aircraft that they fly BOTH for work or research purposes AND recreational purposes; and

- Canadians who do not own a drone or other model aircraft but fly for BOTH work or research purposes AND recreational purposes.

While this study is non-probabilistic, our results show that the incidence of drone users on the Canadian population is 17%. They are not necessarily the owner of the drone they fly and they can use them for either recreational purposes, work or research purposes or for both purposes. Weighting was based on administrative statistics of the starting sample, which creates a calibrated final sample that is representative of the Canadian population, allowing us to evaluate the prevalence of drone users in the population.

Drone users profile

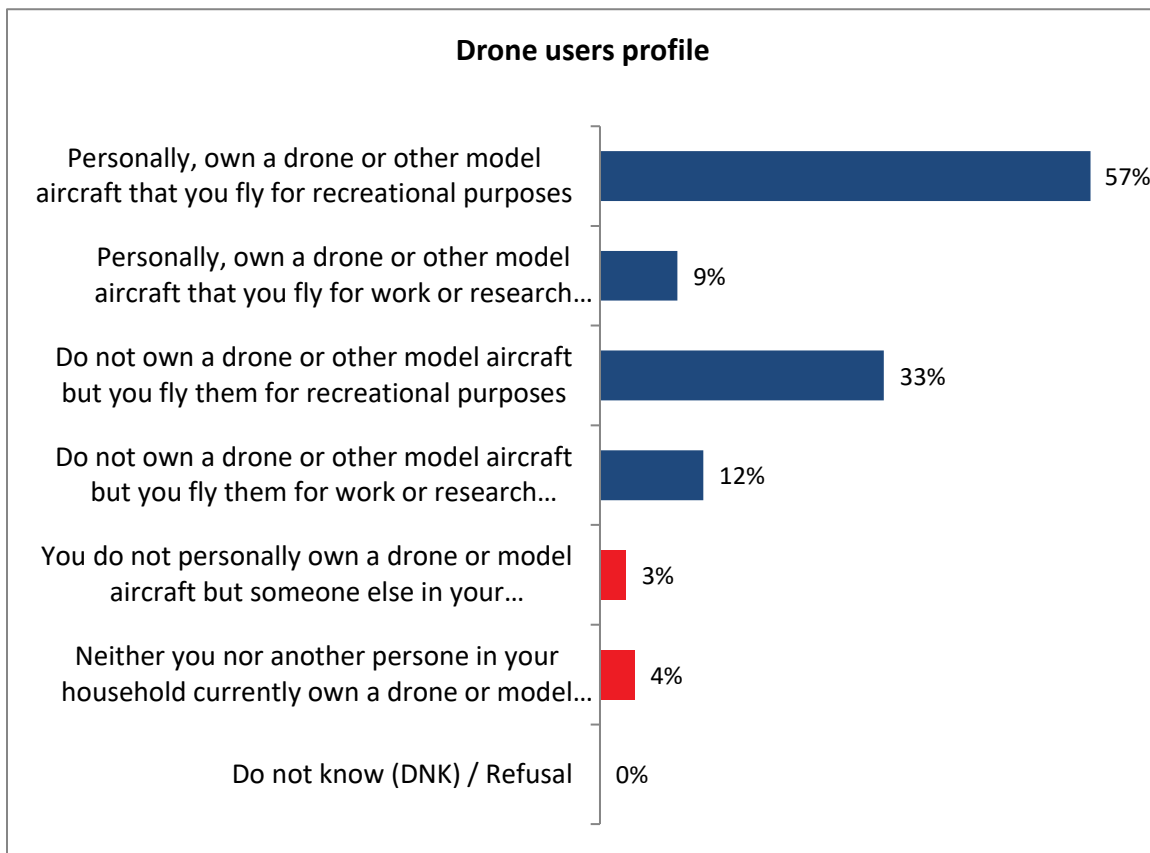| Category	Value
Personally, own a drone or other model aircraft that you fly for recreational purposes	57%
Personally, own a drone or other model aircraft that you fly for work or research…	9%
Do not own a drone or other model aircraft but you fly them for recreational purposes	33%
Do not own a drone or other model aircraft but you fly them for work or research…	12%
You do not personally own a drone or model aircraft but someone else in your…	3%
Neither you nor another person in your household currently own a drone or model…	4%
Do not know (DNK) / Refusal	0%

Figure 1. Answer to question 1: Which of the following best applies to your current situation? Multiple answers allowed *
Base: Total sample (n=700)
*Because respondents were able to give multiple answers, total mentions may exceed 100%.

The next tables detail the prevalence of drone users among Canadians.

Generally speaking, Ontario residents are more likely to be drone users (18%). Males are also more likely to be drone users (23%) as well as people aged between 18 and 34 years (28%). Quebec residents are, at their end, more likely to be non-users (88%). Females are less likely to be drone users (10%) and people who are 55 years and older are more likely to be non-users (92%).

Table 3. Prevalence of drones users among regions

Q1. Which of the following best applies to your current situation?	Total	Atlantic	Quebec	Ontario	Prairies (MB, SK)	Alberta	B.C.+ Territories
n= (weighted)	4,484	307	1,045	1,724	293	504	610
n= (unweighted)	4,484	331	1,187	1,573	287	519	587
Users	17%	18%	**12%-**	**18%+**	14%	19%	16%
Non-users	83%	82%	**88%+**	**82%-**	86%	81%	84%

Table 4. Prevalence of drones users among gender

Q1. Which of the following best applies to your current situation?	Total	Male	Female
n= (weighted)	4,484	2,169	2,306
n= (unweighted)	4,484	2,285	2,192
Users	17%	**23%+**	**10%-**
Non-users	83%	**77%-**	**90%+**

Table 5. Prevalence of drones users among age groups

Q1. Which of the following best applies to your current situation?	Total	18-34	35-54	55+
n= (weighted)	4,484	1,224	1,529	1,731
n= (unweighted)	4,484	1,166	1,686	1,632
Users	17%	**28%+**	17%	**8%-**
Non-users	83%	**72%-**	83%	**92%+**

The next tables detail the type of drone users among Canadians.

Males are more likely to be drone owners (71%), while females are more likely to be non-owners (59%).

Table 6. Type of drone users among regions

Q1. Which of the following best applies to your current situation?	Total	Atlantic	Quebec	Ontario	Prairies (MB, SK)	Alberta	B.C.+ Territories
n= (weighted)	700	51	123	301	40	92	93
n= (unweighted)	700	55	131	280	41	97	96
Owner	61%	69%	59%	62%	67%	59%	59%
Non-owner	39%	31%	41%	38%	33%	41%	41%

Table 7. Type of drone users among gender

Q1. Which of the following best applies to your current situation? Base: All respondents	Total	Male	Female
n= (weighted)	700	479	220

	n= (unweighted)	700	509	190
Owner		61%	**71%+**	**41%-**
Non-owner		39%	**29%-**	**59%+**

Table 8. Type of drone users among age groups

Q1. Which of the following best applies to your current situation?	Total	18-34	35-54	55+
n= (weighted)	700	318	252	130
n= (unweighted)	700	303	286	111
Owner	61%	62%	62%	58%
Non-owner	39%	38%-	38%	42%

The next tables detail the purpose of drone usage among Canadians.

Generally speaking, Canadians who are 55 and older are more likely to be recreational users only (88%). At their end, people aged 18 to 34 are more likely to be professional users.

Table 9. Purpose of drone usage among regions

Q1. Which of the following best applies to your current situation?	Total	Atlantic	Quebec	Ontario	Prairies (MB, SK)	Alberta	B.C.+ Territories
n= (weighted)	700	51	123	301	40	92	93
n= (unweighted)	700	55	131	280	41	97	96
Recreational	79%	81%	81%	80%	78%	79%	72%
Professional	12%	12%	13%	10%	16%	8%	17%
Both	10%	7%	7%	10%	6%	14%	12%

Table 10. Purpose of drone usage among gender

Q1. Which of the following best applies to your current situation? Base: All respondents	Total	Male	Female
n= (weighted)	700	479	220
n= (unweighted)	700	509	190
Recreational	79%	79%	79%
Professional	12%	11%	13%
Both	10%	11%	7%

Table 11. Purpose of drones usage among age groups

Q1. Which of the following best applies to your current situation?	Total	18-34	35-54	55+
n= (weighted)	700	318	252	130
n= (unweighted)	700	303	286	111
Recreational	79%	75%-	79%	88%+
Professional	12%	14%+	11%	7%
Both	10%	11%	10%	6%

2.2 Habits of use of the drone

Generally speaking, the respondents who said they did fly their drones for both recreational purposes and work or research purposes, fly their drones on average 48% of the time for recreational purposes and 37% of the time for work or research purposes.

Out of all the respondents, 31% stated they fly their drone recreationally for less than half of the time, 35% for half of the time or more, and 35% preferred not to say.
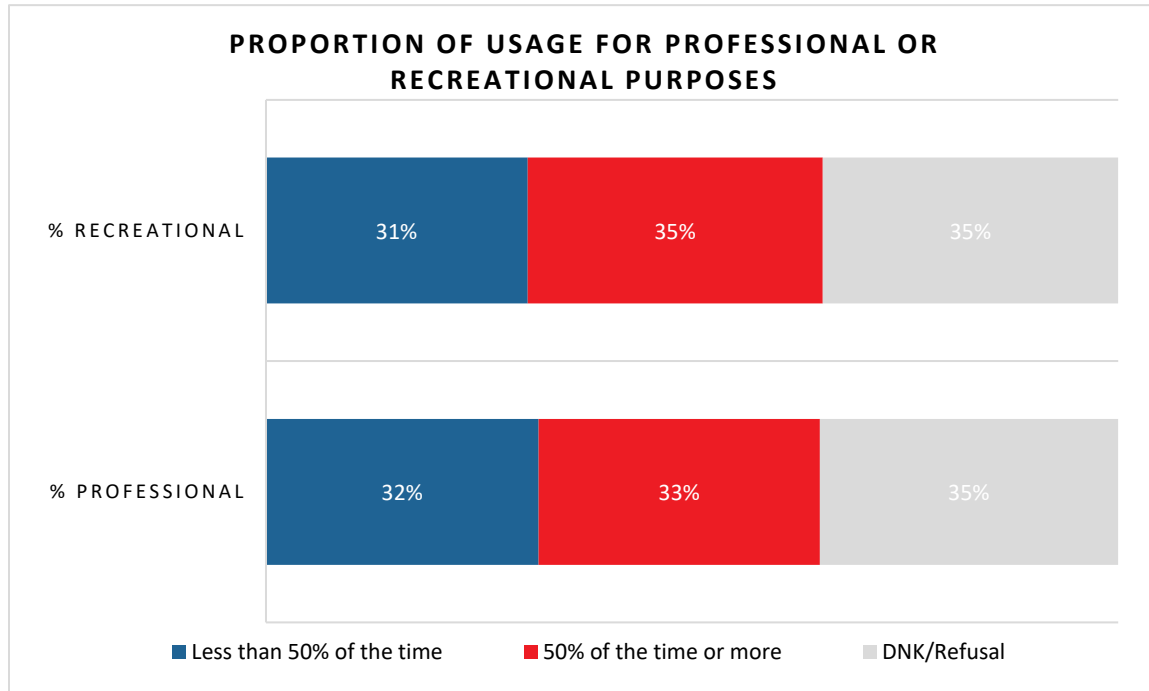

Figure 2. Answer to question 2: You indicated that you fly drones or model aircraft for both work or research and recreational purposes. Thinking about the total number of hours you fly, what is the percentage devoted to professional use versus recreational use? SPONTANEOUS ANSWERS Base: Respondents who fly drones for both recreational and professional purpose (n=71)

Table 12. Proportion of usage for professional or recreational purposes by type of drones users

Q2. Thinking about the total number of hours you fly, what is the percentage devoted to professional use versus recreational use? (% mean) Spontaneous answers Base: Respondents who fly drones for both recreational and professional purpose	Total	Owner	Non-owner*
n= (weighted)	67	35	32
n= (unweighted)	71	43	28
% recreational	48.8%	50.5%	42.0%
% professional	37.3%	40.6%	27.8%

* Given the small number of respondents (n<30) data are presented for illustrative purposes only.

Of all the respondents, only 15% of them have a background in aviation, while 80% said they did not and 5% preferred not to say.

Respondents that are owners of their drone(s) are more likely to have a background in aviation (21%). On their side, respondents who fly drones only for recreational purposes are more likely not to have a background in aviation (84%).

Background in aviation

5%   15%   80%

■ Yes   ■ No   ■ DNK / Refusal

Figure 3. Answer to question 27: Do you have a background in aviation (flying lessons, pilot license or anything related)? Base: All respondents (n=700)

Table 13. Background in aviation by type of drones users

Q27. Do you have a background in aviation (flying lessons, pilot license or anything related)? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	15%	**21%+**	**6%-**
No	80%	**76%-**	**86%+**

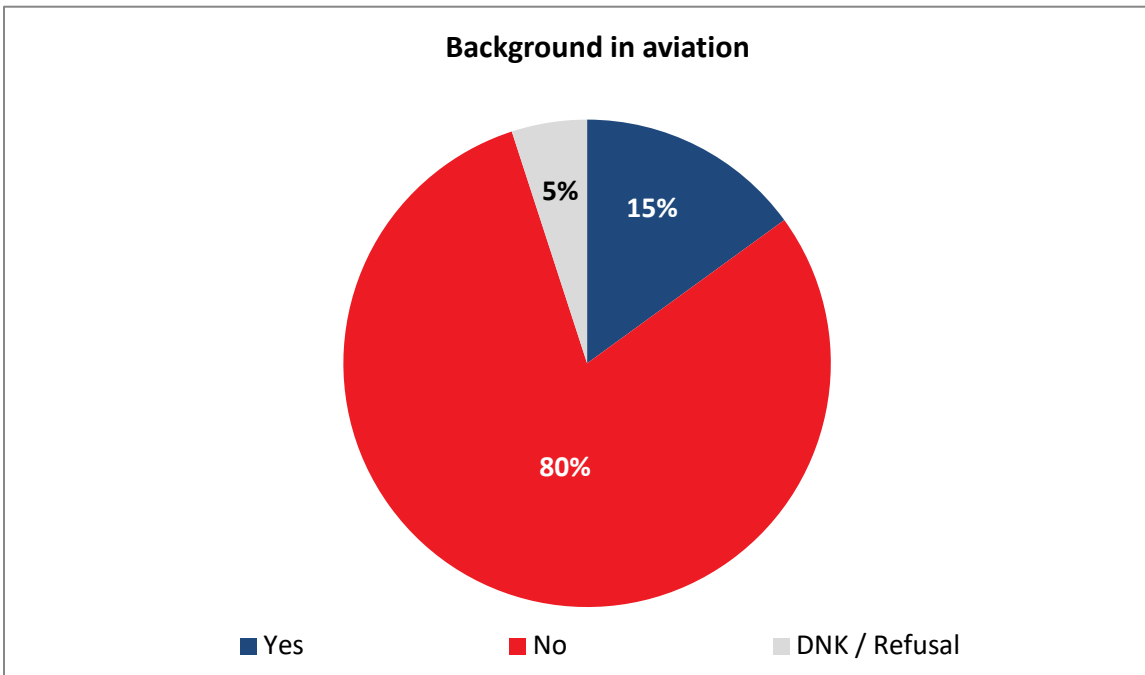|				
DNK / Refusal	5%	**3%-**		**8%+**

Table 14. Background in aviation by drone usage purpose

Q27. Do you have a background in aviation (flying lessons, pilot license or anything related)? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	15%	**13%-**	21%	**28%+**
No	80%	**84%+**	**67%-**	**62%-**
DNK / Refusal	5%	**3%-**	**12%+**	**10%+**

In terms of flying hours, 72% of the respondents say they usually fly their drone(s) for 4 hours or less in a week. Of that percentage, 40% say they usually fly their drone(s) for less than an hour per week and 32% say they fly theirs between one hour and four hours per week.

Drone owners are more likely to fly drones for less than an hour per week (45%) or between one hour and four hours (37%). Recreational users are more likely to fly their drone(s) less than an hour per week (46%), while respondents who fly drones for both recreational purposes and work or research purposes are more likely to use their drone(s) between 10 and 14 hours on a weekly basis (12%).
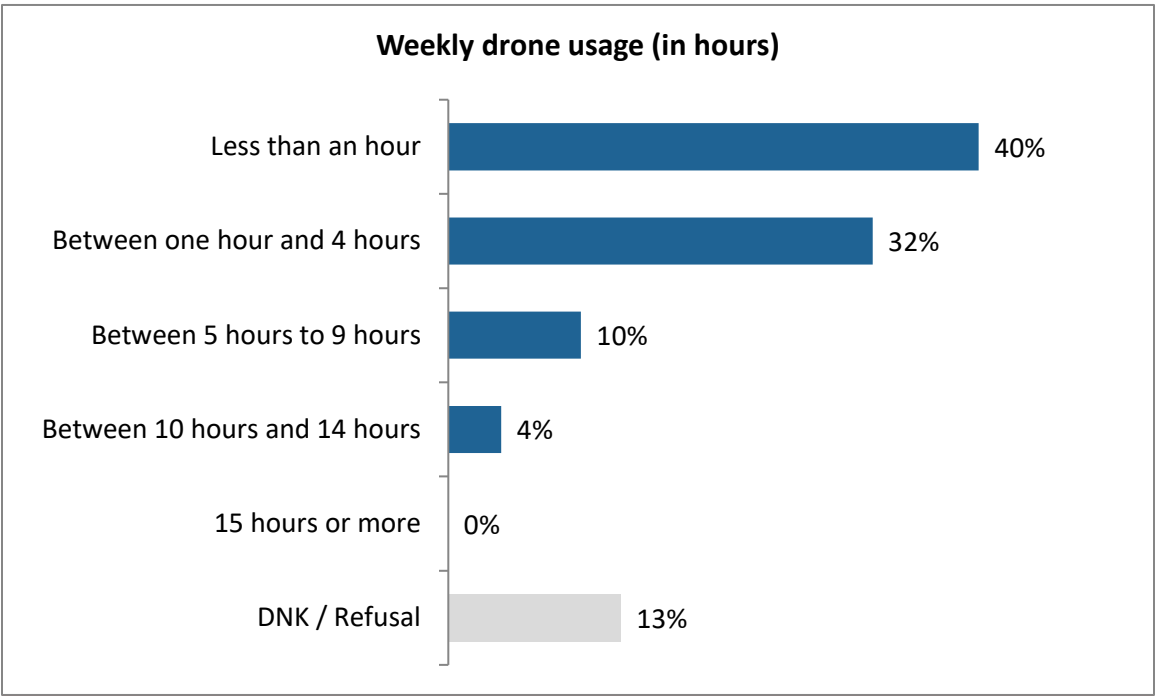

Figure 4. Answer to question 2B: You indicated that you fly drones or model aircraft for work or research and/or recreational purposes. How many hours per week do you approximately fly drones or model aircraft?
Base: All Respondents (n=700)

Table 15. Weekly drone usage (in hours) by type of drones users

Q2B. You indicated that you fly drones or model aircraft for work or research and/or recreational purposes. How many hours per week do you approximately fly drones or model aircraft? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Less than an hour	40%	**45%+**	**33%-**
Between one hour and 4 hours	32%	**37%+**	**24%-**
Between 5 hours to 9 hours	10%	11%	8%
Between 10 hours and 14 hours	4%	5%	2%
15 hours or more	0%	0%	1%
DNK / Refusal	13%	**2%-**	**32%+**

Table 16. Weekly drone usage (in hours) by drone usage purpose

Q2B. You indicated that you fly drones or model aircraft for work or research and/or recreational purposes. How many hours per week do you approximately fly drones or model aircraft? Base : All Respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Less than an hour	40%	**46%+**	**17%-**	**18%-**
Between one hour and 4 hours	32%	32%	39%	22%
Between 5 hours to 9 hours	10%	**8%-**	**18%+**	15%
Between 10 hours and 14 hours	4%	**3%-**	4%	**12%+**
15 hours or more	0%	**0%-**	**2%+**	2%
DNK / Refusal	13%	**10%-**	**21%+**	**31%+**

Generally speaking, recreational users mainly fly their drone(s) for the fun of flying (64%) and 26% fly theirs to film videos or take pictures.

Drone owners are more likely to fly their drone(s) just for the fun of flying (70%). On their part, non-owners are less likely to fly drones just for the fun of flying (52%).

Recreational drone usage

Category	Percentage
Just for the fun of flying	64%
To film video or take pictures	26%
Other use	1%
DNK / Refusal	9%
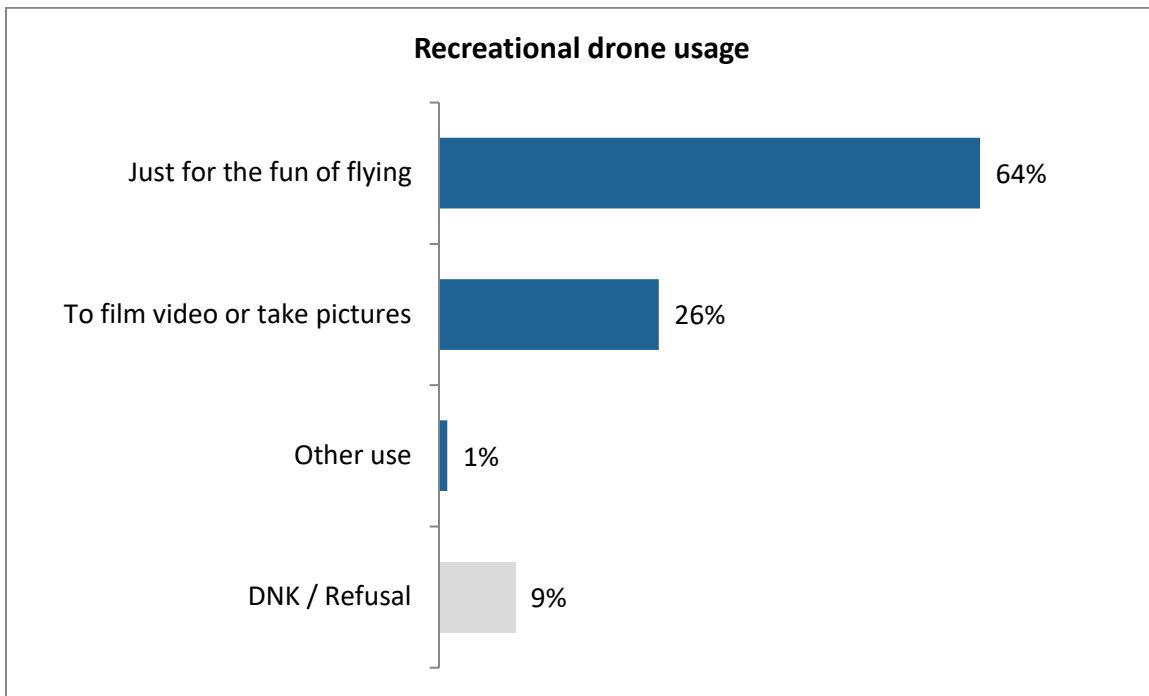
Figure 5. Answer to question 3: How do you mainly use your drone or model aircraft? Base: Respondents who fly drones for recreational purpose (n=618)

Table 17. Recreational drone usage by type of drones users

Q3. How do you mainly use your drone or model aircraft? Base: Respondents who fly drones for recreational purpose	Total	Owner	Non-owner
n= (weighted)	619	400	219
n= (unweighted)	618	419	199
Just for the fun of flying	64%	**70%+**	**52%-**
To film video or take pictures	26%	28%	23%
Other use	1%	1%	0%
DNK / Refusal	9%	**1%-**	**23%+**

One out of four professional users (25%) mainly fly drones for filmmaking, videography or photography, and one out of five (22%) mainly fly drones for research/academic research purposes. Respondent that own at least one drone are more likely to fly drones for research/academic research purposes than anything else (35%).

Professional drone usage

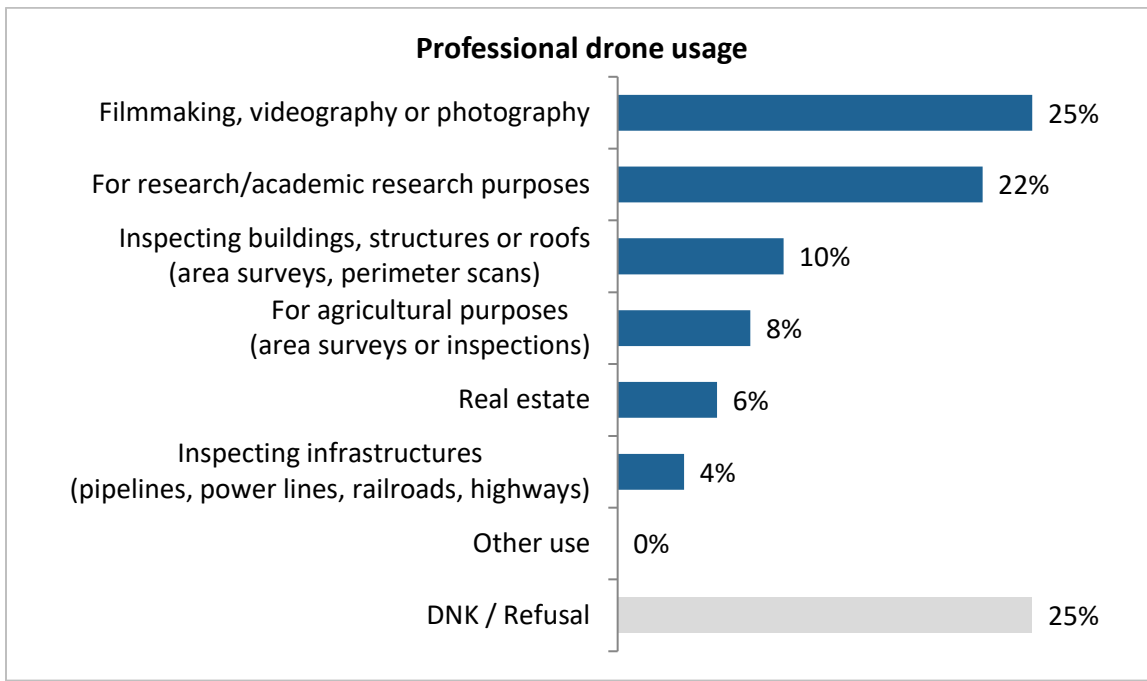| Category	Percentage
Filmmaking, videography or photography	25%
For research/academic research purposes	22%
Inspecting buildings, structures or roofs (area surveys, perimeter scans)	10%
For agricultural purposes (area surveys or inspections)	8%
Real estate	6%
Inspecting infrastructures (pipelines, power lines, railroads, highways)	4%
Other use	0%
DNK / Refusal	25%

Figure 6. Answer to question 5: What is your main reason for flying a drone or model aircraft for work or research? Base: Respondents who fly drones for professional purpose (n=153)

Table 18. Professional drone usage by type of drones users

Q5. What is your main reason for flying a drone or model aircraft for work or research? Base: Respondents who fly drones for professional purpose	Total	Owner	Non-owner
n= (weighted)	148	64	84
n= (unweighted)	153	71	82
Filmmaking, videography or photography	25%	28%	23%
For research/academic research purposes	22%	**35%+**	**12%-**
Inspecting buildings, structures or roofs (area surveys, perimeter scans)	10%	13%	8%
For agricultural purposes (area surveys or inspections)	8%	12%	4%
Real estate	6%	7%	6%
Inspecting infrastructures (pipelines, power lines, railroads, highways)	4%	4%	4%
Other use	0%	0%	1%
DNK / Refusal	25%	**1%-**	**43%+**

Generally speaking, drone users mostly fly their drone(s) in a rural area (37%).

That being said, drone owners are more likely to fly their drone(s) in urban and suburban areas (respectively 36% and 38%). Users who fly drones for both recreational and professional purposes are more likely to fly their drone(s) in an urban area (43%).

Most popular location to fly drones

Location	Percentage
In a rural area	37%
In a suburban area	34%
In an urban area	32%
DNK / Refusal	11%
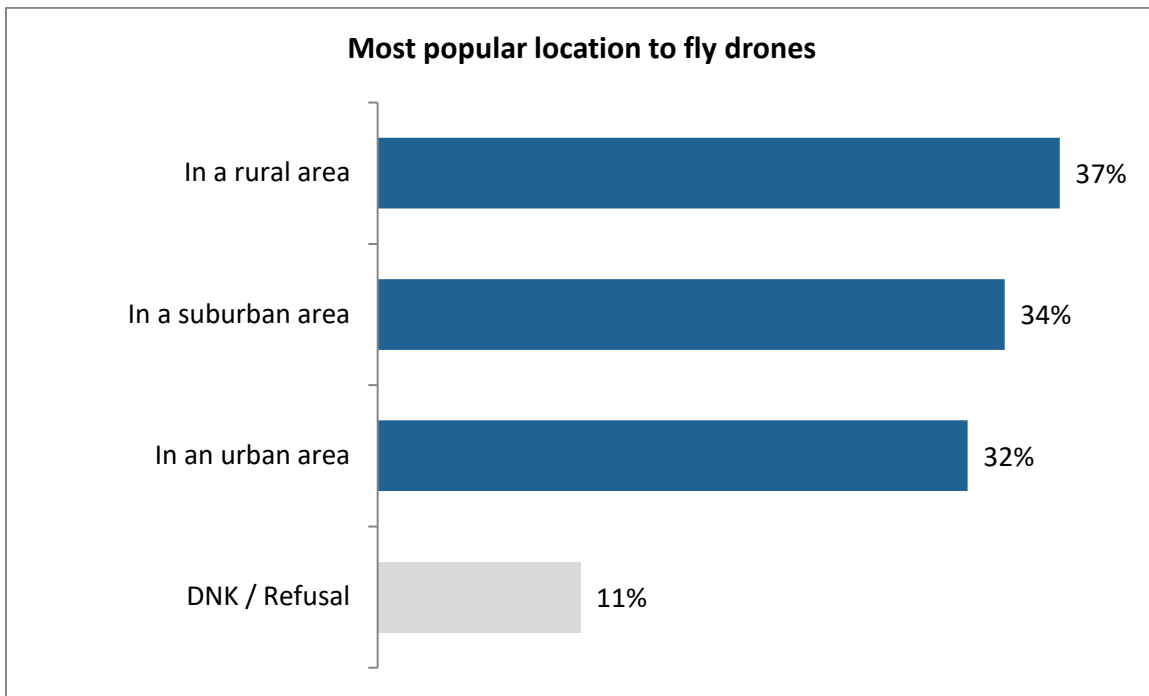
*Figure 7. Answer to question 4: Where do you most often fly your drone or model aircraft? MULTIPLE ANSWERS ALLOWED * Base: Total sample (n=700)*

*Because respondents were able to give multiple answers, total mentions may exceed 100%.

Table 19. Most popular location to fly drones by type of drones users

Q4. Where do you most often fly your drone or model aircraft? Multiple answers allowed * Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
In a rural area	37%	37%	36%
In a suburban area	34%	**38%+**	**28%-**
In an urban area	32%	**36%+**	**26%-**
DNK / Refusal	11%	**3%-**	**24%+**

*Because respondents were able to give multiple answers, total mentions may exceed 100%.

Table 20. Most popular location to fly drones by drone usage purpose

Q4. Where do you most often fly your drone or model aircraft? MULTIPLE ANSWERS ALLOWED * Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
In a rural area	37%	38%	30%	32%
In a suburban area	34%	35%	32%	34%
In an urban area	32%	31%	29%	**43%+**
DNK / Refusal	11%	**9%-**	**18%+**	**23%+**

Because respondents were able to give multiple answers, total mentions may exceed 100%.

2.3   Profile of drone owned

Generally, six out of ten drone owners (68%) don't own more than one drone, almost two out of ten owners (19%) own two drones and less than one owner out of ten (8%) owns three drones or more.

As shown in table 21, drone owners who fly drones for both professional and recreational purposes are more likely to own more than one drone. Indeed, 30% of the drone owners who fly drones for both purposes said that they own three drones or more. On the other hand, drone owners who only fly drones for recreational purposes are more likely to only own one drone (74%).

Numbers of drones owned

- 1: 68%
- 2: 19%
- 3 or more: 8%
- DNK / Refusal: 5%
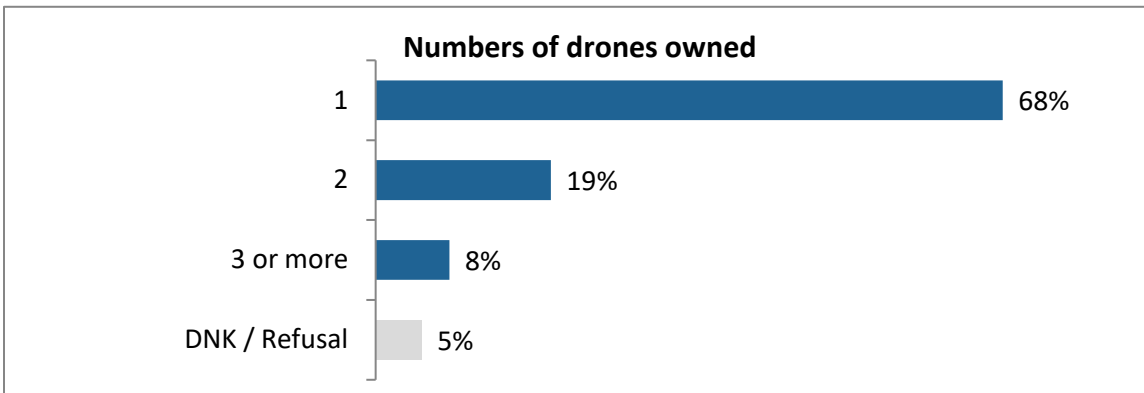
Figure 8. Answer to question 6: How many drones or model aircraft do you currently own? Spontaneous mentions
Base: Drone owners (n=447)

Table 21. Numbers of drones owned by drone usage purpose

Q6. How many drones or model aircraft do you currently own? SPONTANEOUS MENTIONS Base: Drone owners	Total	Recreational	Professional*	Both
n= (weighted)	429	364	29	35
n= (unweighted)	447	376	28	43
1	68%	**74%+**	33%	**34%-**
2	19%	18%	30%	22%
3 or more	8%	**6%-**	17%	**30%+**
DNK / Refusal	5%	**3%-**	19%	**14%+**

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

As for the place of purchase, three quarter of the respondents bought their most used drone through a retail store (76%), whether it was in-store (49%) or online (27%).

Recreational drone owners are more likely to have made an in-store purchase (53%) and are less likely to have made the purchase online (26%). On their part, drone owners that fly drones for recreational and professional reasons are more likely to have made their purchase online, through a website specializing in drones (29%).

Place of purchase

In a retail store (in-store purchase)	49%
Online through a retail store	27%
Online through a website specializing in drones	10%
Second-hand (e.g. from a friend, online through Kijiji, etc.)	5%
Received it as a gift	5%
I built it myself from a kit	2%
I built it myself from parts	1%
DNK / Refusal	1%

Figure 9. Answer to question 7: Thinking of the drone or model aircraft you now fly most often, where did you purchase it?
Base: Drone owners (n=447)

Table 22. Place of purchase by drone usage purpose
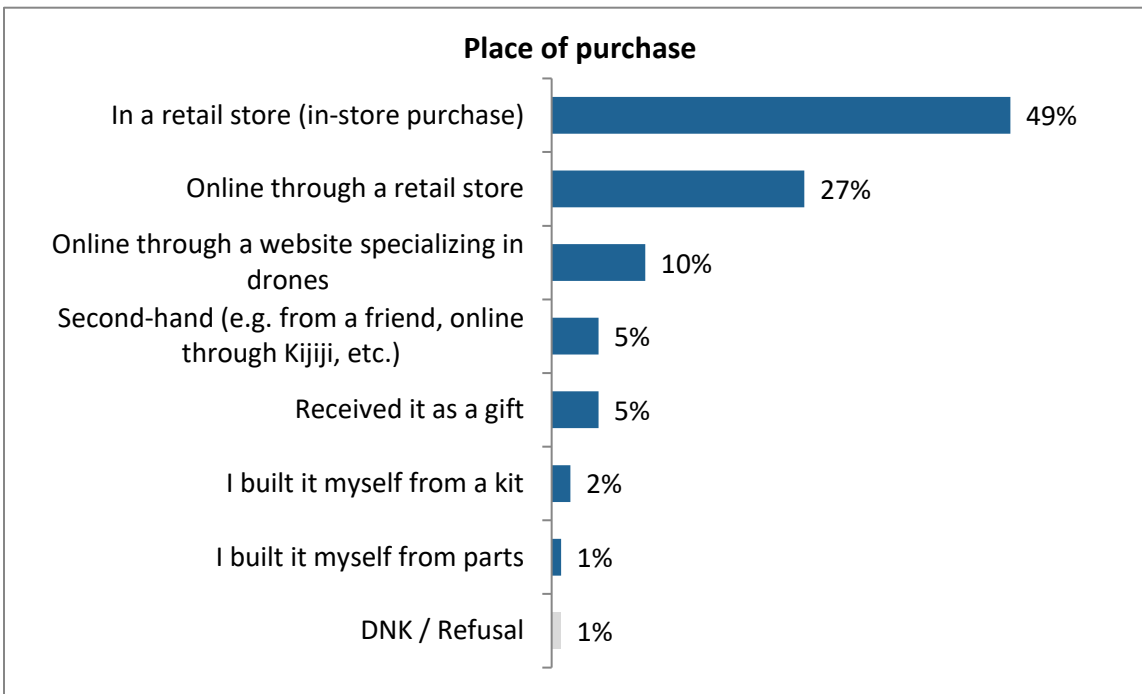
Q7. Thinking of the drone or model aircraft you now fly most often, where did you purchase it? Base: Drone owners	Total	Recreational	Professional*	Both
n= (weighted)	429	364	29	35
n= (unweighted)	447	376	28	43

In a retail store (in-store purchase)	49%	**53%+**	15%	35%
Online through a retail store	27%	**26%-**	48%	30%
Online through a website specializing in drones	10%	**7%-**	27%	**29%+**
Second-hand (e.g. from a friend, online through Kijiji, etc.)	5%	5%	2%	3%
Received it as a gift	5%	**6%+**	0%	0%
I built it myself from a kit	2%	2%	4%	3%
I built it myself from parts	1%	1%	0%	0%
DNK / Refusal	1%	0%	4%	0%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

When questioned about the make or brand of the drone they fly most often, 28% of the drone owners who did not build their drone themselves said they did not know what it was. DJI seems to be the most popular brand (16%), followed by Blade (11%). That being said, drone owners who did not build their drone themselves and who fly drones for both recreational and professional purposes are more likely to own a Parrot drone (22%).
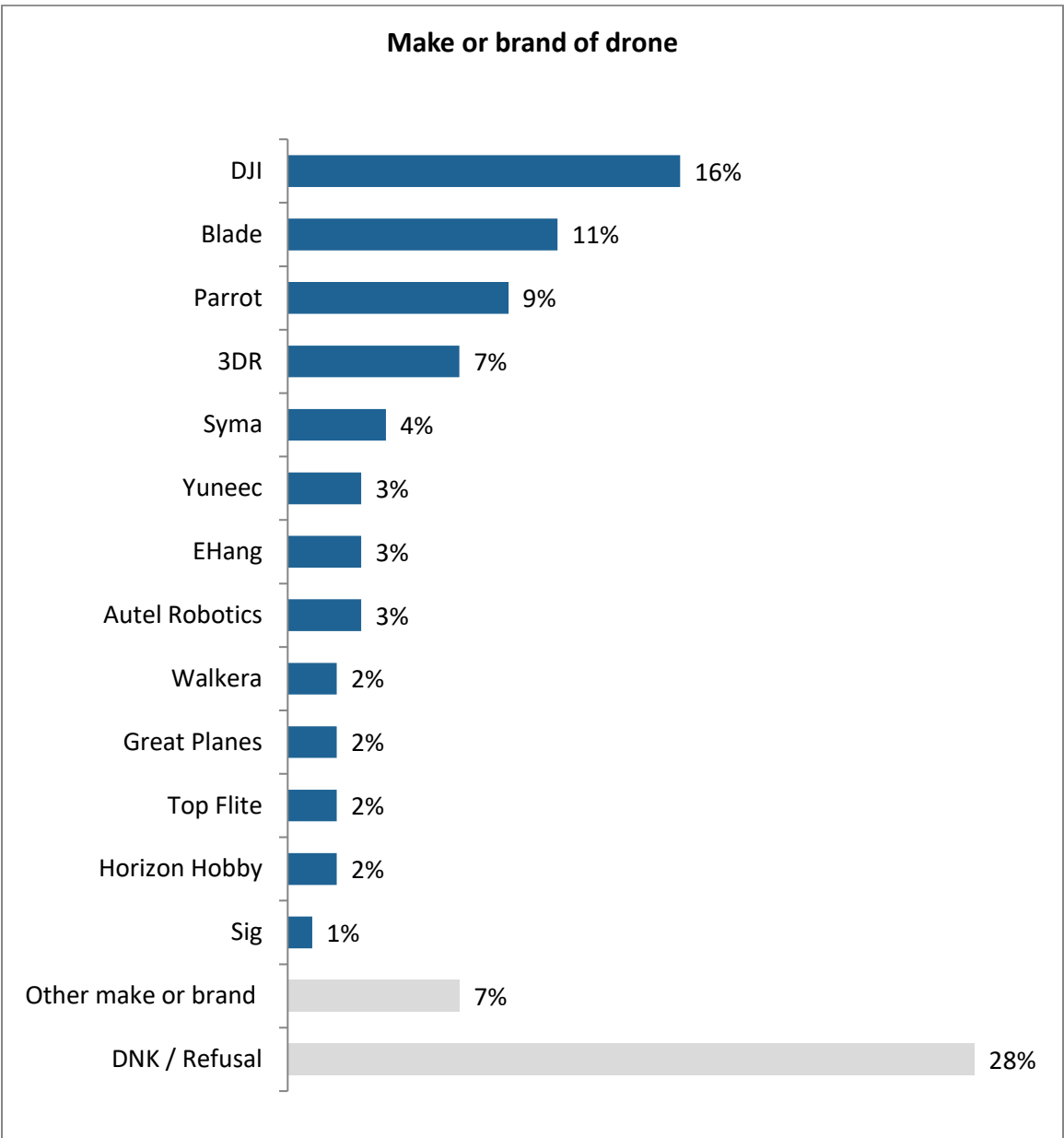
Make or brand of drone

Brand	Percentage
DJI	16%
Blade	11%
Parrot	9%
3DR	7%
Syma	4%
Yuneec	3%
EHang	3%
Autel Robotics	3%
Walkera	2%
Great Planes	2%
Top Flite	2%
Horizon Hobby	2%
Sig	1%
Other make or brand	7%
DNK / Refusal	28%

Figure 10. Answer to question 8: What is the make or brand of your drone or model aircraft you fly most often?
Base: Drone owners who did not build their drone themselves (n=444)

Table 23. Make or brand of drone by drone usage purpose

Q8. What is the make or brand of your drone or model aircraft you fly most often? Base: Drone owners who did not build their drone themselves	Total	Recreational	Professional*	Both
n= (weighted)	426	361	29	35
n= (unweighted)	444	373	28	43
DJI	16%	15%	19%	23%
Blade	11%	10%	12%	17%
Parrot	9%	8%	6%	**22%+**
3DR	7%	6%	20%	7%

Syma	4%	4%	6%	4%
Yuneec	3%	3%	4%	6%
EHang	3%	3%	4%	2%
Autel Robotics	3%	**1%-**	14%	**8%+**
Walkera	2%	2%	6%	5%
Great Planes	2%	2%	4%	0%
Top Flite	2%	2%	1%	4%
Horizon Hobby	2%	2%	2%	0%
Sig	1%	1%	0%	0%
Other make or brand	7%	**9%+**	0%	2%
DNK / Refusal	28%	**33%+**	0%	**2%-**

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

Generally speaking, drone owners don't seem to know the weight of the drone they fly most often. Indeed, 74% of the respondents said they didn't know the weight of the drone they most often fly, even when given the choice to answer in metric or imperial system. For those who knew the weight of their drone, the average weight is 5.8 pounds. The overall average weight of a drone is 5.8 pounds and the general median is 1 pound. When looking at the answers given by recreational users, the average weight comes down to 3.7 pounds. The complete opposite happens when looking at the answers given by professional users—the average weight goes up to 24.6 pounds. Recreational drone owners are less likely to own a drone that weighs more than 5 pounds (4%).
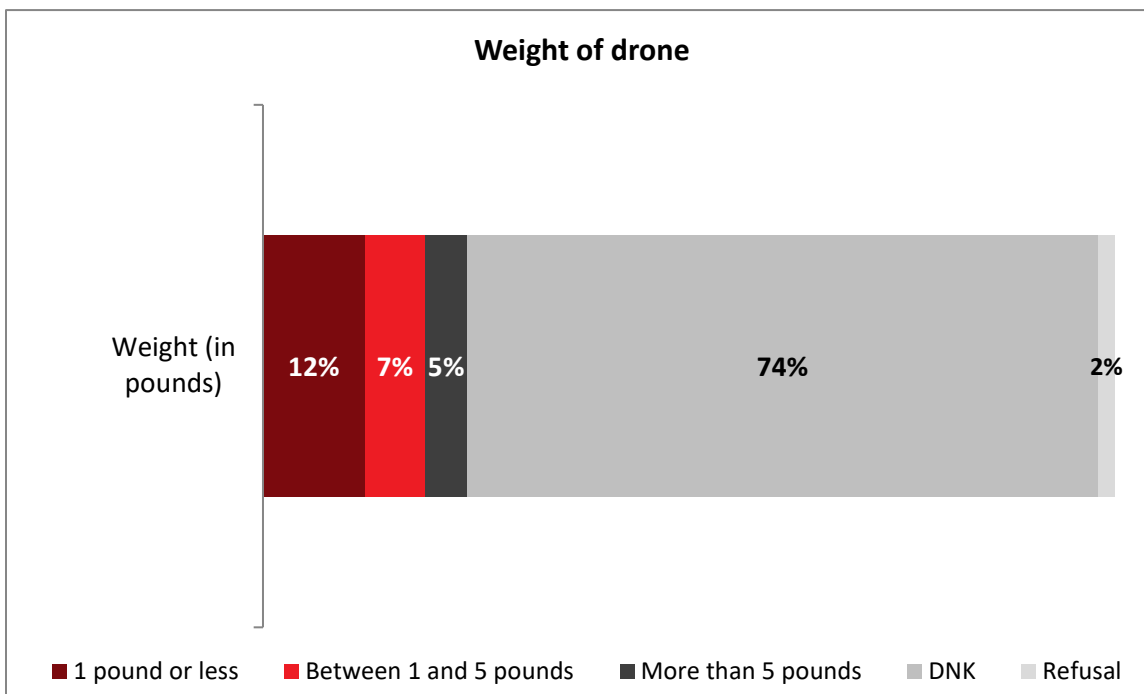

Figure 11. Answer to question 9: Do you know the weight of your drone or model aircraft you fly most often? Spontaneous answers Base: Drone owners (n=447)

Table 24. Weight of drone by drone usage purpose

Q9. Do you know the weight of your drone or model aircraft you fly most often? SPONTANEOUS	Total	Recreational	Professional*	Both

ANSWERS Base: Drone owners				
n= (weighted)	429	364	29	35
n= (unweighted)	447	376	28	43
1 pound or less	12%	12%	13%	12%
Between 1 and 5 pounds	7%	7%	1%	9%
More than 5 pounds	5%	**4%-**	14%	8%
Do not know	74%	75%	67%	67%
Refusal	2%	2%	4%	3%
Mean (pounds)	5.8	3.7	24.6	7.1

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

2.4 Drone clubs and learning techniques

Only 2% of the respondents are part of a drone or model aircraft club or group. That being said, 18% of the respondents said they are actively looking into joining one.

Respondents who are flying drones for recreational and professional purposes are more likely to be looking into joining a club or group (29%), while recreational users are more likely to not be part of a club or group (77%).
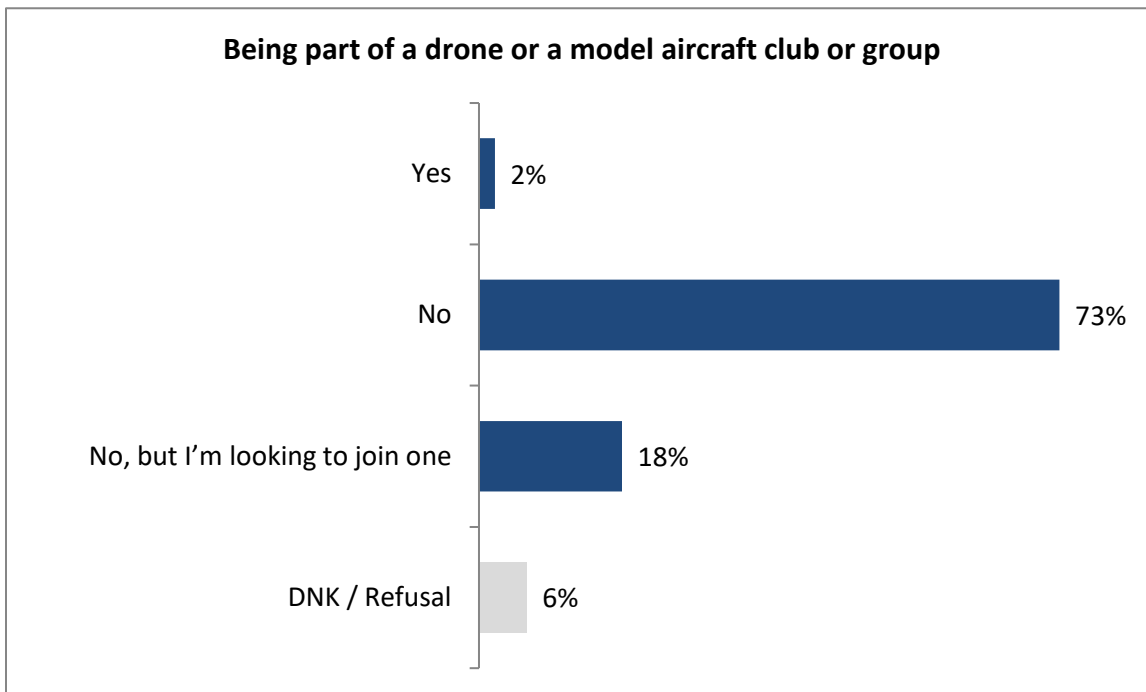

Being part of a drone or a model aircraft club or group

- Yes 2%
- No 73%
- No, but I'm looking to join one 18%
- DNK / Refusal 6%

Figure 12. Answer to question 10: Do you currently belong to a drone or model aircraft club or group?
Base: Total sample (n=700)

Table 25. Being part of a drone or a model aircraft club or group by type of drones users

Q10. Do you currently belong to a drone or model aircraft club or group? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	2%	2%	1%

No	73%	73%	73%
No, but I'm looking to join one	18%	20%	15%
DNK / Refusal	6%	**4%-**	**10%+**

Table 26. Being part of a drone or a model aircraft club or group by drone usage purpose

Q10. Do you currently belong to a drone or model aircraft club or group? Base : All Respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	2%	2%	4%	4%
No	73%	**77%+**	64%	**50%-**
No, but I'm looking to join one	18%	**17%-**	22%	**29%+**
DNK / Refusal	6%	**5%-**	10%	**18%+**

Generally speaking, one out of two respondents learned how to fly a drone or a model aircraft by trial and error (54%). Only 4% of respondents enrolled in a drone-flying class to learn the drone flying technique.

Drone owners are more likely to be self-taught (67%) while they are less likely to have learned through a friend or colleague (13%). On the other hand, non-owners are less likely to be self-taught (33%), but they are more likely to have been taught by a friend or colleague (24%).

Based on the purpose of drone usage, professional users are less likely to be self-taught (19%), while recreational users are more likely to be self-taught than by any other way (62%). On the other hand, professional drone users are more likely to have enrolled in a drone flying class (13%).
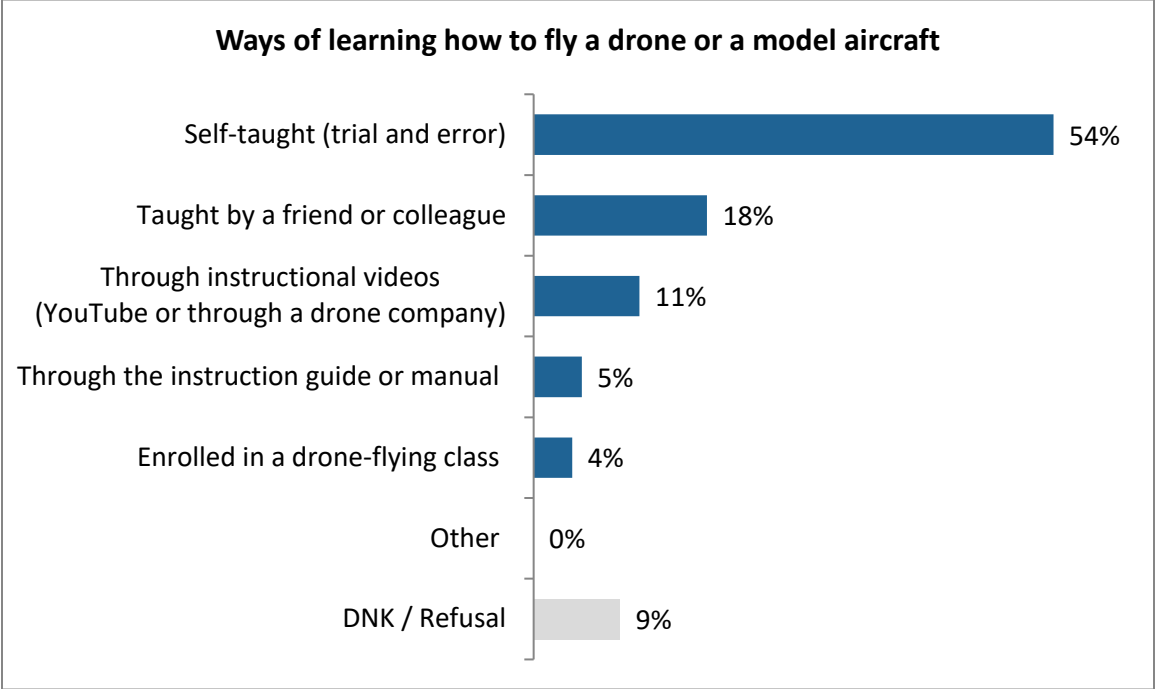

Ways of learning how to fly a drone or a model aircraft

- Self-taught (trial and error) — 54%
- Taught by a friend or colleague — 18%
- Through instructional videos (YouTube or through a drone company) — 11%
- Through the instruction guide or manual — 5%
- Enrolled in a drone-flying class — 4%
- Other — 0%
- DNK / Refusal — 9%

Figure 13. Answer to question 11: How did you learn to fly a drone or model aircraft?
Base: Total sample (n=700)

Table 27. Ways of learning how to fly a drone or a model aircraft by type of drones users

Q11. How did you learn to fly a drone or model aircraft? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Self-taught (trial and error)	54%	**67%+**	**33%-**
Taught by a friend or colleague	18%	**13%-**	**24%+**
Through instructional videos (YouTube or through a drone company)	11%	11%	11%
Through the instruction guide or manual	5%	6%	4%
Enrolled in a drone-flying class	4%	3%	5%
Other	0%	0%	0%
DNK / Refusal	9%	**0%-**	**22%+**

Table 28. Ways of learning how to fly a drone or a model aircraft by drone usage purpose

Q11. How did you learn to fly a drone or model aircraft? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Self-taught (trial and error)	54%	**62%+**	**19%-**	**28%-**
Taught by a friend or colleague	18%	**16%-**	23%	**27%+**
Through instructional videos (YouTube or through a drone company)	11%	**9%-**	**21%+**	12%
Through the instruction guide or manual	5%	5%	**10%+**	2%
Enrolled in a drone-flying class	4%	**2%-**	**13%+**	6%
Other	0%	0%	0%	0%
DNK / Refusal	9%	**6%-**	13%	**25%+**

Out of the respondents who admitted having enrolled in a drone flying class (4%), 47% of them took an online class, while 48% of them attended a physical class (e.g. school, community centre).
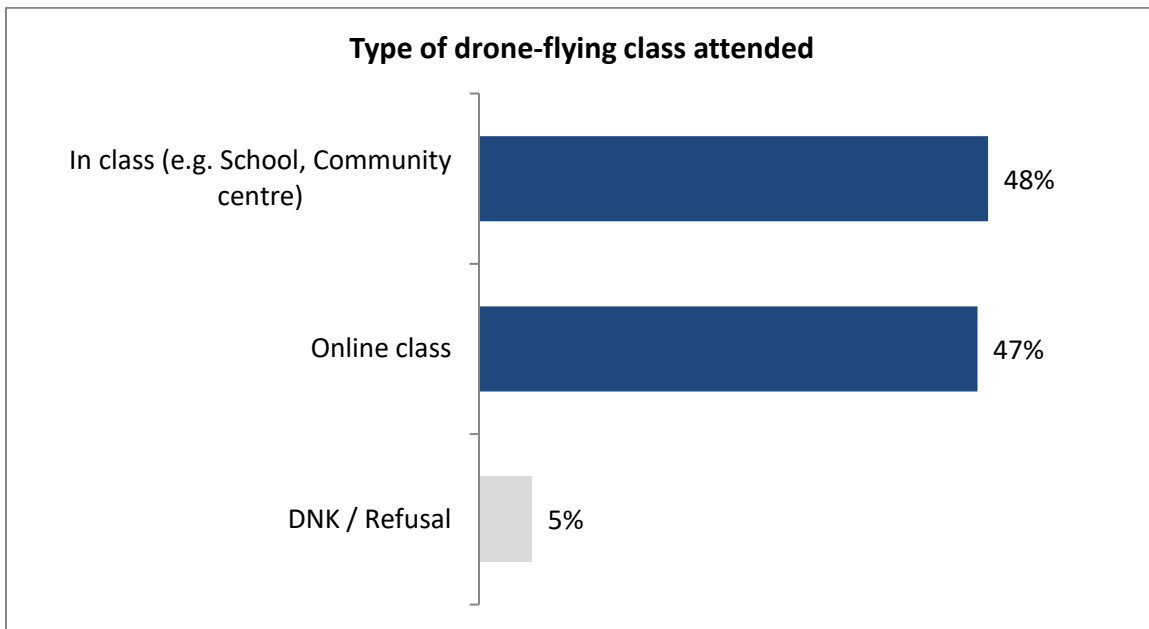
Type of drone-flying class attended

Category	Percentage
In class (e.g. School, Community centre)	48%
Online class	47%
DNK / Refusal	5%

Figure 14. Answer to question 12: You mentioned attending a drone-flying class. What kind of class was it?
Base: Respondents who attended a drone-flying class (n=34)

2.5   Drone pilot certification and safety training

Even though the majority of the respondents do not have a drone pilot certificate issued by the Government of Canada (73%), two out of ten respondents either have one or are in the process of obtaining one (21%).

Drone owners are more likely to have a drone pilot certificate issued by the Government of Canada (13%). Recreational users are less likely to have the certificate (7%), while users who fly drones for both purposes are more likely to have a drone pilot certificate (21%). As for professional users, they are more likely to be in the process of obtaining their certificate (25%).
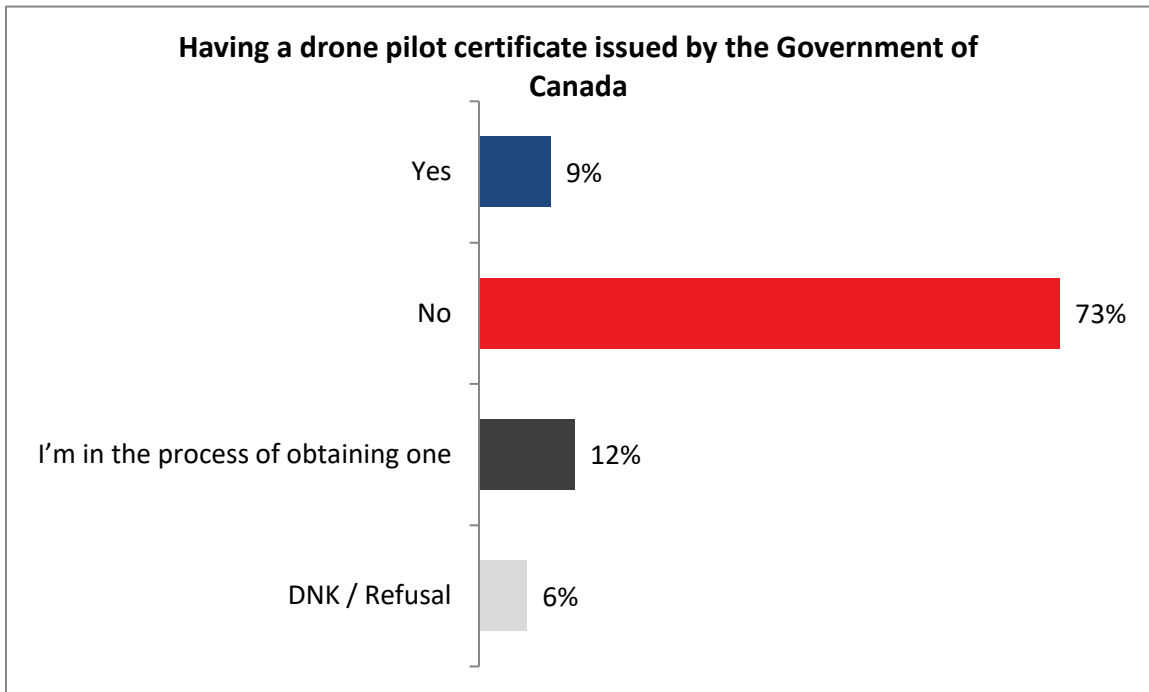
Having a drone pilot certificate issued by the Government of Canada

Category	Percentage
Yes	9%
No	73%
I'm in the process of obtaining one	12%
DNK / Refusal	6%

Figure 15. Answer to question 13: Do you have a drone pilot certificate issued by the Government of Canada?
Base: All respondents (n=700)

Table 29. Having a drone pilot certificate issued by the Government of Canada by type of drones users

| Q13. Do you have a drone pilot certificate issued by the Government of Canada? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	9%	**13%+**	**3%-**
No	73%	71%	75%
I'm in the process of obtaining one	12%	13%	11%
DNK / Refusal	6%	**3%-**	**11%+**

Table 30. Having a drone pilot certificate issued by the Government of Canada by drone usage purpose

Q13. Do you have a drone pilot certificate issued by the Government of Canada? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	9%	**7%-**	14%	**21%+**
No	73%	**79%+**	**48%-**	**48%-**
I'm in the process of obtaining one	12%	**9%-**	**25%+**	18%
DNK / Refusal	6%	**4%-**	**13%+**	**12%+**

As you can see in figure 16, more than half of the respondents (58%) have not received any training or seen any instructional video specifically on safety relative to flying drones or model aircraft in Canada. However, three out of ten respondents (37%) have seen such a video or received such training.

Drone owners are more likely to have received training or seen an instructional video on drone safety (44%). In the same vein, professional users and users who fly drones for both recreational and work or research purposes are less likely to be part of those who did not receive any training nor seen any instructional video on drone safety (respectively 47% and 38%).

Having received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada

37%

58%

5%
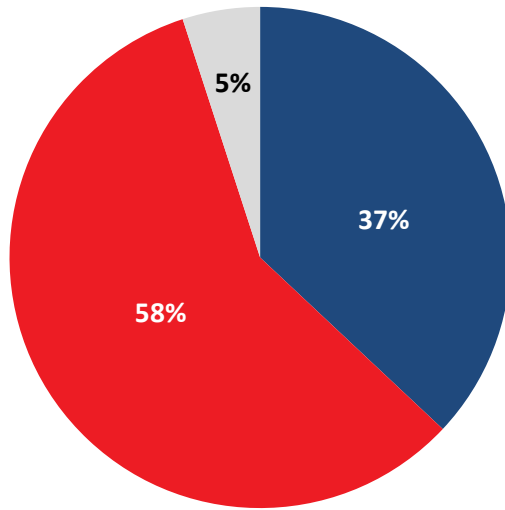
■ Yes   ■ No   ■ DNK / Refusal

Figure 16. Answer to question 14: Have you ever received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada?
Base: All respondents (n=700)

Table 31. Having received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada by type of drones users

Q14. Have you ever received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	37%	**44%+**	**26%-**
No	58%	**54%-**	**64%+**
DNK / Refusal	5%	**3%-**	**10%+**

Table 32. Having received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada by drone usage purpose

Q14. Have you ever received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	37%	36%	40%	42%
No	58%	**62%+**	**47%-**	**38%-**
DNK / Refusal	5%	**2%-**	**14%+**	**20%+**

In the same vein as the results just presented, six out of ten respondents (68%) have not received any training or seen any instructional video specifically on Transport Canada's drone safety regulations, only a quarter of the respondents (25%) have seen such a video or received such training.

Drone owners are more likely to have received training or seen an instructional video on Transport Canada's drone safety (28%). Professional users and users who fly drones for both recreational and work or research purposes are less likely to be part of those who did not receive any training nor seen any instructional video on TC's drone safety regulations (respectively 43% and 47%).

It is also interesting to note that respondents who fly drones for work or research as well as the ones that do so for both recreational and work or research purposes are more likely to not know if they have received such training or seen such instructional videos (respectively 15% and 17%).

Having received training or seen an instructional video specifically on tc's draftey regulations

- 25%
- 68%
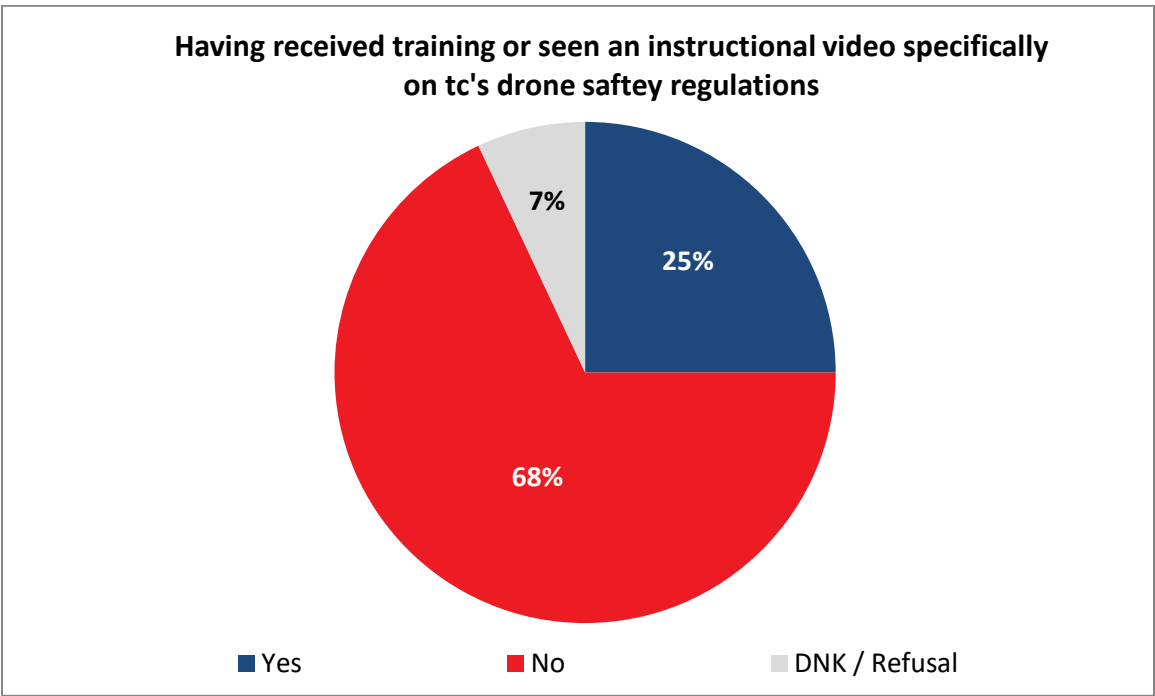- 7%

Yes   No   DNK / Refusal

Figure 17. Answer to question 15: Have you ever received training or seen an instructional video on Transport Canada's drone safety regulations? Base: All respondents (n=700)

Table 33. Having received a training or seen an instructional video specifically on Transport Canada's drone safety regulations by type of drones users

Q15. Have you ever received training or seen an instructional video on Transport Canada's drone safety regulations? Base : All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	25%	**28%+**	**20%-**
No	68%	67%	70%
DNK / Refusal	7%	**4%-**	**11%+**

Table 34. Having received training or seen an instructional video specifically on Transport Canada's drone safety regulations by drone usage purpose

Q15. Have you ever received training or seen an instructional video on <u>Transport Canada's drone safety regulations?</u> Base : All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	25%	**21%-**	**41%+**	**36%+**
No	68%	**74%+**	**43%-**	**47%-**
DNK / Refusal	7%	**4%-**	**15%+**	**17%+**

2.6 Information sources and Transport Canada's website drone pages visits

Generally speaking, 57% of the respondents mention that they did not seek or search for information on Canadian government regulations regarding drones or model aircraft.

Drone owners are more likely to have sought or searched for information on Canadian government regulations (43%). According to the purpose of drone usage, recreational users are less likely to have sought for information on Canadian government regulations (33%). As for professional users and the ones who fly drones for both purposes, they are more likely to have sought for information on Canadian government regulations (respectively 52% and 49%).

Having searched for information on Canadian Government regulations regarding drones or model aircraft
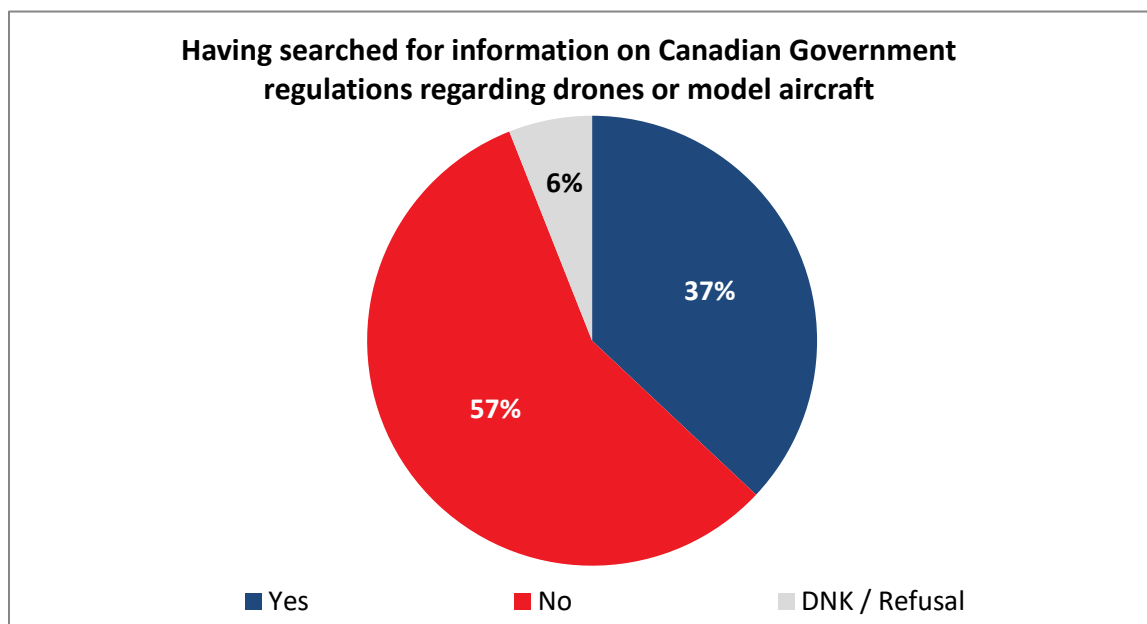
- Yes: 37%
- No: 57%
- DNK / Refusal: 6%

Figure 18. Answer to question 16: Have you ever sought or searched for information on Canadian government regulations regarding drones or model aircraft?
Base: All respondents (n=700)

Table 35. Having searched for information on Canadian Government regulations regarding drones or model aircraft by type of drones users

Q16. Have you ever sought or searched for information on Canadian Government	Total	Owner	Non-owner

regulations regarding drones or model aircraft? Base: All respondents			
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	37%	**43%+**	**28%-**
No	57%	55%	62%
DNK / Refusal	6%	**3%-**	**10%+**

Table 36. Having searched for information on Canadian Government regulations regarding drones or model aircraft by drone usage purpose

Q16. Have you ever sought or searched for information on Canadian Government regulations regarding drones or model aircraft? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	37%	**33%-**	**52%+**	**49%+**
No	57%	**63%+**	**38%-**	**34%-**
DNK / Refusal	6%	**4%-**	10%	**17%+**

Of the respondents who stated that they have sought information on Canadian government regulations regarding drones or model aircraft, 68% of them did so using a search engine
(e.g. Google, Bing, Yahoo, etc.), 48% visited the Government's website and 25% went directly on Transport Canada's website.

Based on the purpose of drone usage, respondents flying drones only for work or research purposes are less likely to have conducted a search engine query (50%), while recreational users are more likely to have done so (72%). As for users who fly drones for both purposes, they are more likely to have visited the Government of Canada website (69%), consulted a hobbyist publication, article or magazine for drone users (23%) or asked a specialized retailer—whether online or in-store (27%).

Seven out of ten respondents (71%) who conducted a social media search used Facebook as the search platform.
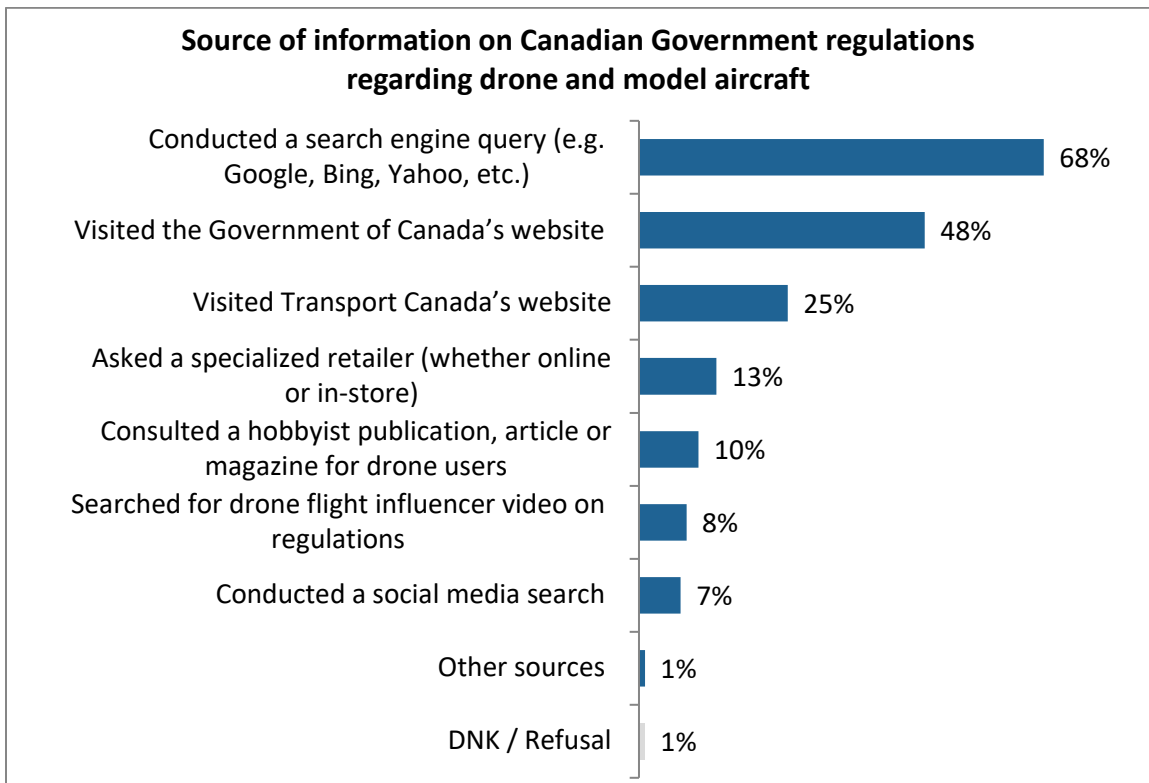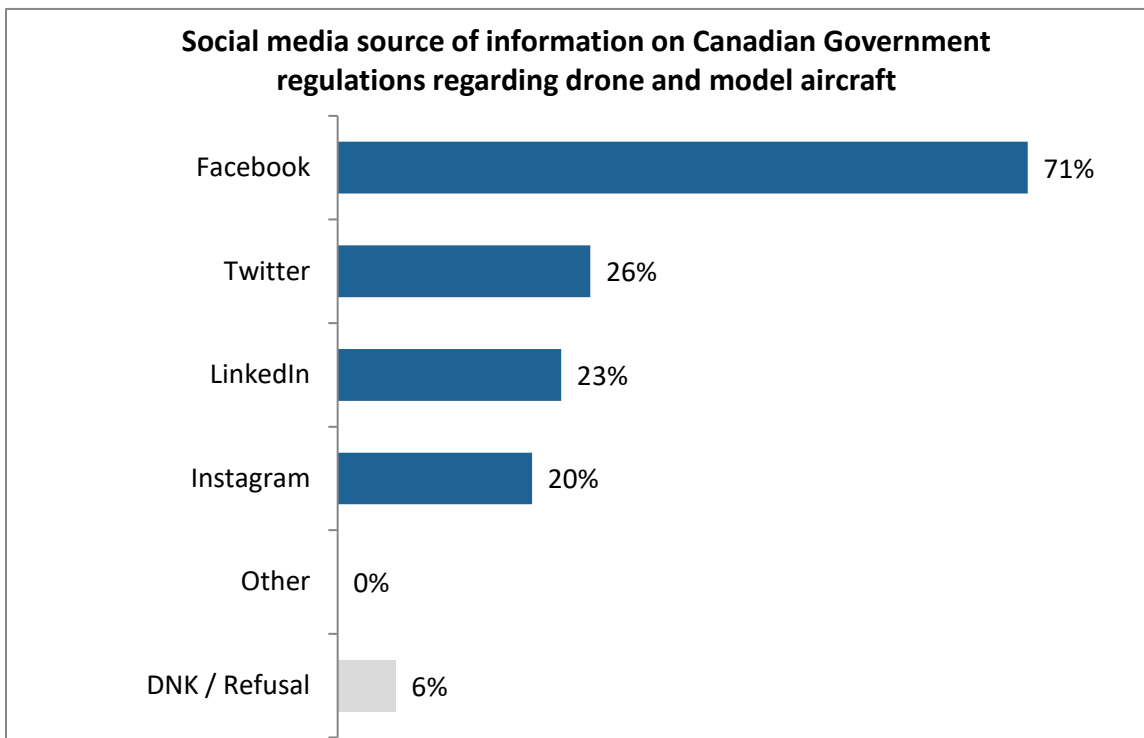
Source of information on Canadian Government regulations regarding drone and model aircraft

Source	Percentage
Conducted a search engine query (e.g. Google, Bing, Yahoo, etc.)	68%
Visited the Government of Canada's website	48%
Visited Transport Canada's website	25%
Asked a specialized retailer (whether online or in-store)	13%
Consulted a hobbyist publication, article or magazine for drone users	10%
Searched for drone flight influencer video on regulations	8%
Conducted a social media search	7%
Other sources	1%
DNK / Refusal	1%

Figure 19. Answer to question 17: Where did you go to find that information?
Base: Respondents who searched for information on Canadian government regulations regarding drones or model aircraft (n=275)

Table 37. Source of information on Canadian Government regulations regarding drone and model aircraft by type of drones users

Q17. Where did you go to find that information? Base: Respondents who searched for information on Canadian Government regulations regarding drones or model aircraft	Total	Owner	Non-owner
n= (weighted)	259	183	76
n= (unweighted)	275	194	81
Conducted a search engine query (e.g. Google. Bing, Yahoo, etc.)	68%	70%	61%
Visited the Government of Canada's website	48%	49%	44%
Visited Transport Canada's website	25%	26%	25%
Asked a specialized retailer (whether online or in-store)	13%	15%	10%
Consulted a hobbyist publication, article or magazine for drone users	10%	10%	10%
Searched for drone flight influencer video on regulations	8%	6%	12%
Conducted a social media search	7%	6%	10%
Other sources	1%	1%	0%
DNK / Refusal	1%	0%-	2%+

Table 38. Source of information on Canadian Government regulations regarding drone and model aircraft by drone usage purpose

Q17. Where did you go to find that information? Base: Respondents who searched for information on Canadian Government regulations regarding drones or model aircraft	Total	Recreational	Professional	Both
n= (weighted)	259	184	43	33
n= (unweighted)	275	190	47	38
Conducted a search engine query (e.g. Google. Bing, Yahoo, etc.)	68%	**72%+**	**50%-**	65%
Visited the Government of Canada's website	48%	**41%-**	58%	**69%+**
Visited Transport Canada's website	25%	**22%-**	31%	37%
Asked a specialized retailer (whether online or in-store)	13%	11%	11%	**27%+**
Consulted a hobbyist publication, article or magazine for drone users	10%	**7%-**	13%	**23%+**
Searched for drone flight influencer video on regulations	8%	7%	12%	8%
Conducted a social media search	7%	6%	9%	8%
Other sources	1%	1%	0%	0%
DNK / Refusal	1%	**0%-**	0%	**5%+**

Social media source of information on Canadian Government regulations regarding drone and model aircraft

- Facebook 71%
- Twitter 26%
- LinkedIn 23%
- Instagram 20%
- Other 0%
- DNK / Refusal 6%

Figure 20. Answer to question 17B: You mentioned that you found information regarding Canadian Government regulations of drones or model aircraft through a social media search. Please specify which platform(s). Multiple answers allowed*
Base: Respondents who searched for information on Canadian government regulations regarding drones or model aircraft though a social media

Because respondents were able to give multiple answers, total mentions may exceed 100%.
**Given the small number of respondents (n<30) data are presented for illustrative purposes only.*

Of the respondents who did not search for information on Canadian Government regulations regarding drones or model aircraft on Transport Canada's site, 57% of them said they did visit TC's website drone pages and 37% of them said they did not.

Drone owners are more likely to have visited Transport Canada website drone pages (62%) and recreational users are less likely to have visited the pages (52%).
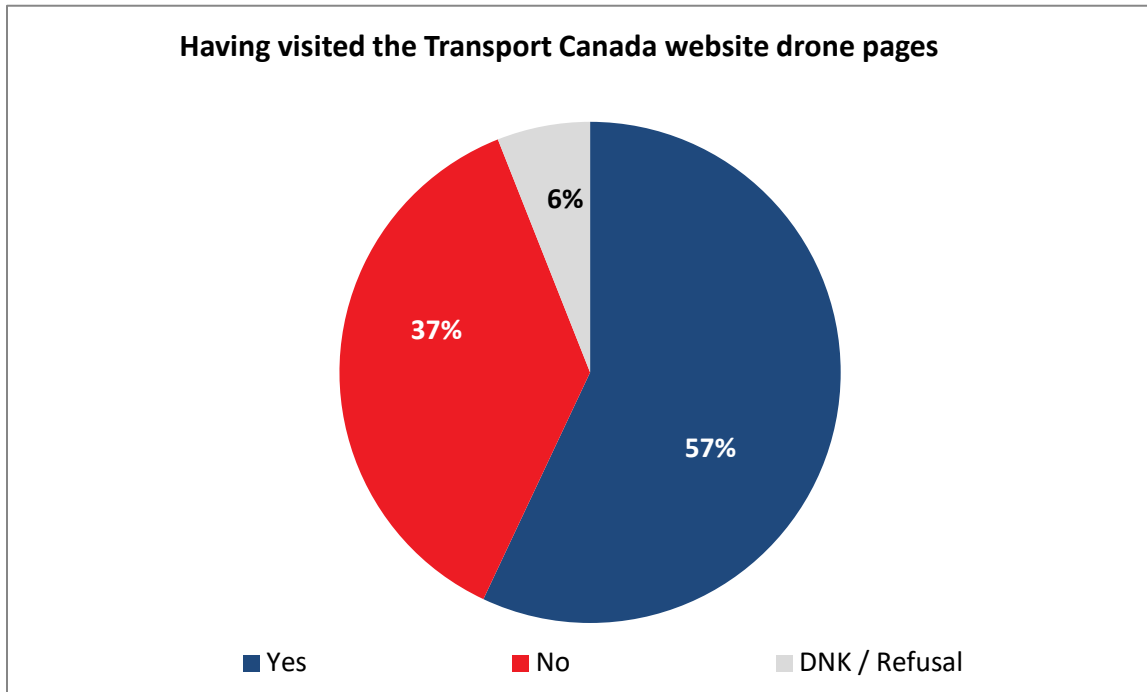

Having visited the Transport Canada website drone pages

- Yes — 57%
- No — 37%
- DNK / Refusal — 6%

Figure 21. Answer to question 18: Have you ever visited the Transport Canada website drone pages?
Base: Respondents who did not search for information on Canadian Government regulations regarding drones or model aircraft on Transport Canada's website (n=202)

Table 39. Having visited the Transport Canada website drone pages by type of drones users

Q18. Have you ever visited the Transport Canada website drone pages? Base: Respondents who did not find information on Canadian government regulations regarding drones or model aircraft on Transport Canada's website	Total	Owner	Non-owner
n= (weighted)	194	136	57
n= (unweighted)	202	146	56
Yes	57%	62%+	45%-
No	37%	32%-	49%+
DNK / Refusal	6%	6%	5%

Table 40. Having visited the Transport Canada website drone pages by drone usage purpose

Q18. Have you ever visited the Transport Canada website drone pages? Base: Respondents who did not find information on Canadian government regulations regarding drones or model aircraft on Transport Canada's website	Total	Recreational	Professional	Both*
n= (weighted)	194	144	29	21
n= (unweighted)	202	145	33	24
Yes	57%	**52%-**	67%	76%
No	37%	41%	33%	18%
DNK / Refusal	6%	7%	0%	6%

*Given the small number of respondents (n<30) data are presented for illustrative purposes only.

A clear majority of the respondents who visited Transport Canada's website pages about drones (80%) searched for information about the current rules and regulations. One respondent out of ten searched for information on how to register their drone (11%) and only 8% sought information on how to get a drone pilot certificate. It appears some respondents dissociate the notion of actively searching for information on regulations from their actual visit of the Transport Canada website.

Looking at tables 41 and 42, you can see that there are no significant differences between the type of drone users and the purpose of drone usage in regards to the information sought on Transport Canada's website.

Information searched when visiting the Transport canada website pages about drones

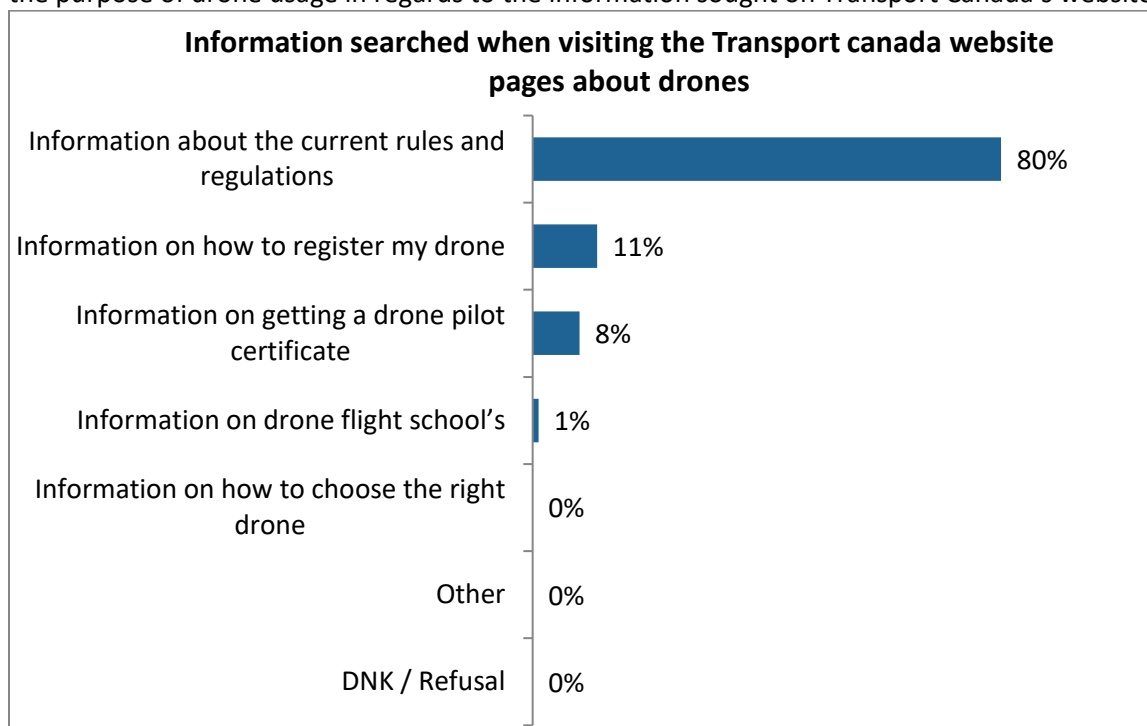|	
Information about the current rules and regulations	80%
Information on how to register my drone	11%
Information on getting a drone pilot certificate	8%
Information on drone flight school's	1%
Information on how to choose the right drone	0%
Other	0%
DNK / Refusal	0%

Figure 22. Answer to question 19: Please indicate exactly what you were looking for when you visited the Transport Canada website pages about drones? Multiple answers allowed*
Base: Respondents who visited the Transport Canada website pages about drones (n=121)
*Because respondents were able to give multiple answers, total mentions may exceed 100%.

Table 41. Information searched when visiting the Transport Canada website drone pages by type of drones users

Q19. Please indicate exactly what you were looking for when you visited the Transport Canada website pages about drones? Multiple answers allowed* Base: Respondents who visited the Transport Canada website pages about drones	Total	Owner	Non-owner**
n= (weighted)	111	85	26
n= (unweighted)	121	93	28
Information about the current rules and regulations	80%	80%	80%
Information on how to register my drone	11%	10%	11%
Information on getting a drone pilot certificate	8%	7%	9%
Information on drone flight school's	1%	2%	0%
Information on how to choose the right drone	0%	0%	0%
Other	0%	0%	0%
DNK / Refusal	0%	0%	0%

*Because respondents were able to give multiple answers, total mentions may exceed 100%.
**Given the small number of respondents (n<30) data are presented for illustrative purposes only.

Table 42. Information searched when visiting the Transport Canada website drone pages by drone usage purpose

Q19. Please indicate exactly what you were looking for when you visited the Transport Canada website pages about drones? Multiple answers allowed* Base: Respondents who visited the Transport Canada website pages about drones	Total	Recreational	Professional**	Both**
n= (weighted)	111	75	20	16
n= (unweighted)	121	78	23	20
Information about the current rules and regulations	80%	85%	76%	65%
Information on how to register my drone	11%	8%	15%	18%
Information on getting a drone pilot certificate	8%	5%	9%	17%
Information on drone flight school's	1%	2%	0%	0%
Information on how to choose the right drone	0%	0%	0%	0%
Other	0%	0%	0%	0%
DNK / Refusal	0%	0%	0%	0%

*Because respondents were able to give multiple answers, total mentions may exceed 100%.
**Given the small number of respondents (n<30) data are presented for illustrative purposes only.

2.7 Drones and model aircraft regulations

Generally speaking, half of the respondents think that they are not knowledgeable in regards of the Transport Canada drones and model aircraft regulations (50%). Indeed, 26% said they considered themselves "Not very knowledgeable" and 24% stated they were "Not at all knowledgeable." All in all, only 11% considered they were "Very knowledgeable."

Drone owners are more likely to be knowledgeable (50%) while non-owners are more likely to not be knowledgeable (57%). Users who only fly drones for recreational purposes are less likely to be knowledgeable (40%). On their side, respondents who fly drones for work or research purposes are more likely to be knowledgeable (55%). Users who fly drones for both purposes are, on their end, more likely to be knowledgeable (62%).

Level of knowledge of the Transport Canada regulations on drones and model aircraft

- Very knowledgeable — 11%
- Somewhat knowledgeable — 33%
- Not very knowledgeable — 26%
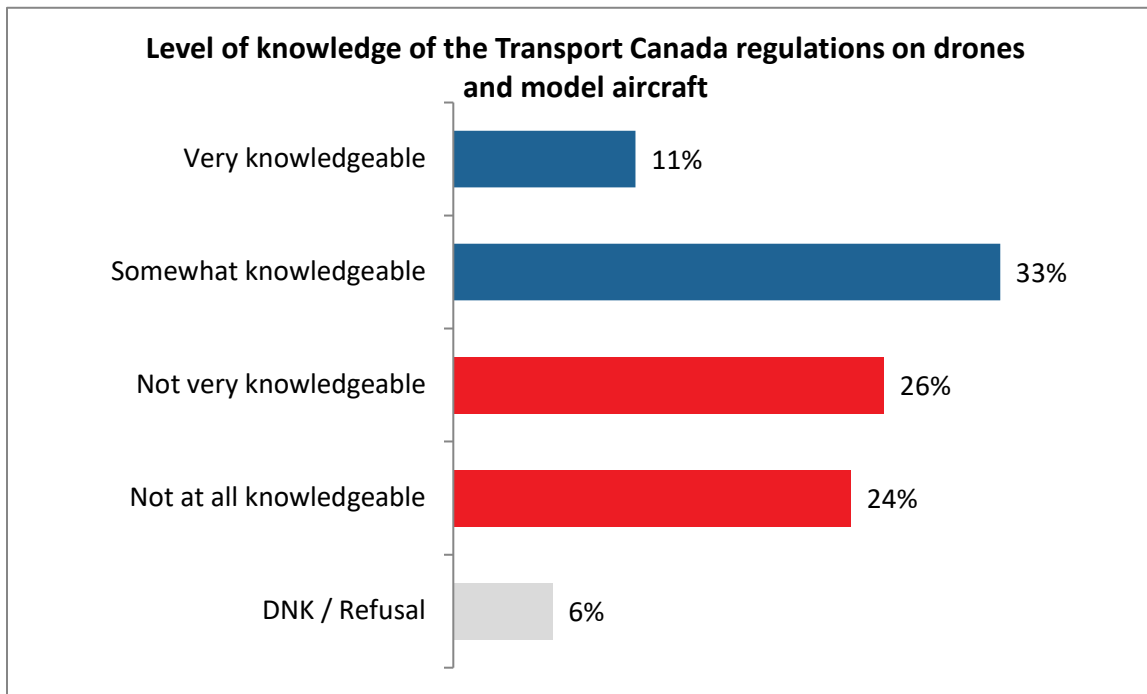- Not at all knowledgeable — 24%
- DNK / Refusal — 6%

Figure 23. Answer to question 20: How would you rate your level of knowledge of the Transport Canada regulations on drones and model aircraft? Base: All respondents (n=700)

Table 43. Level of knowledge of the Transport Canada regulations on drones and model aircraft by type of drones users
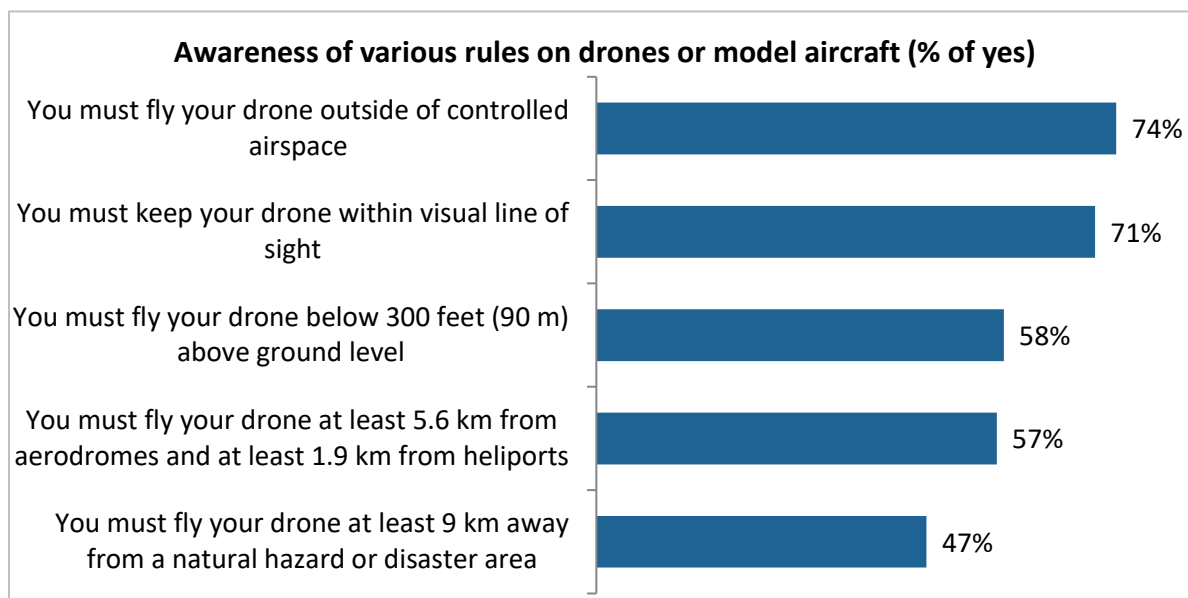
Q20. How would you rate your level of knowledge of the Transport Canada regulations on drones and model aircraft? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Net Knowledgeable	44%	50%+	34%-
Very knowledgeable	11%	14%+	6%-
Somewhat knowledgeable	33%	36%+	27%-
Net Not knowledgeable	50%	45%-	57%+
Not very knowledgeable	26%	29%+	22%-
Not at all knowledgeable	24%	16%-	35%+
DNK / Refusal	6%	5%-	10%+

Table 44. Level of knowledge of the Transport Canada regulations on drones and model aircraft by drone usage purpose

Q20. How would you rate your level of knowledge of the Transport Canada regulations on drones and model aircraft? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Net Knowledgeable	44%	**40%-**	**55%+**	**62%+**
Very knowledgeable	11%	**8%-**	**23%+**	**20%+**
Somewhat knowledgeable	33%	32%	32%	42%
Net Not knowledgeable	50%	**54%+**	41%	**24%-**
Not very knowledgeable	26%	**29%+**	22%	**11%-**
Not at all knowledgeable	24%	**25%+**	19%	**14%-**
DNK / Refusal	6%	6%	4%	**14%+**

The drone or model aircraft rule that is the best known by recreational users is the one stating that one must fly its drone outside of controlled airspace (74%) followed closely by the one stating that one must keep its drone within visual line of sight (71%).

Generally speaking, drone owners who fly drones recreationally are more likely to be aware of the various rules on drones and model aircraft listed (see table 45). But there are no significant results whether the user only flies drones for recreational purposes or if they fly them for both recreational and professional purposes.

Awareness of various rules on drones or model aircraft (% of yes)

Rule	%
You must fly your drone outside of controlled airspace	74%
You must keep your drone within visual line of sight	71%
You must fly your drone below 300 feet (90 m) above ground level	58%
You must fly your drone at least 5.6 km from aerodromes and at least 1.9 km from heliports	57%
You must fly your drone at least 9 km away from a natural hazard or disaster area	47%

Figure 24. Answer to question 21A: Were you aware of the following rules on drones or model aircraft currently in force in Canada?
Base: Respondents who fly drones and model aircraft recreationally (n=618)

Table 45. Awareness of various rules on drones and model aircraft by type of drones users

Q21A. Were you aware of the following rules on drones or model aircraft currently in force in Canada? % of YES Base: Respondents who fly drones and model aircraft recreationally	Total	Owner	Non-owner
n= (weighted)	619	400	219
n= (unweighted)	618	419	199
You must fly your drone outside of controlled airspace	74%	**80%+**	**62%-**
You must keep your drone within visual line of sight	71%	**76%+**	**62%-**
You must fly your drone below 300 feet (90 m) above ground level	58%	**65%+**	**46%-**
You must fly your drone at least 5.6 km from aerodromes and at least 1.9 km from heliports	57%	**64%+**	**45%-**
You must fly your drone at least 9 km away from a natural hazard or disaster area	47%	**51%+**	**41%-**

Half of the respondents who fly drones for work or research purposes (50%) are aware that they must apply to Transport Canada to obtain a Special Flight Operations Certificate OR be eligible for an exemption if their operation is low-risk.

In the same vein as the recreational users, drone owners who fly drones for work or research purposes are more likely to be aware of the rule on drones and model aircraft (65%) listed (see table 47). But there are no significant differences whether the user only flies drones for professional purposes or if they flies them for both recreational and professional purposes.
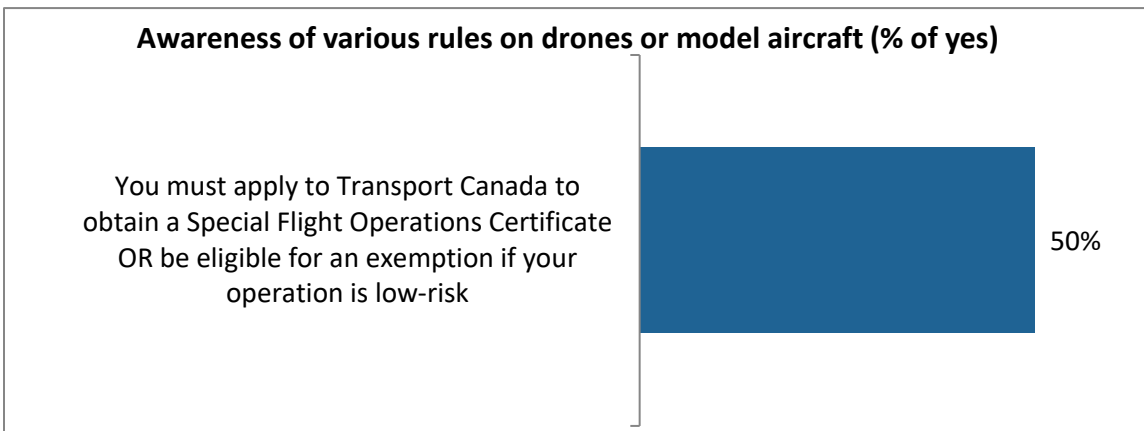
Awareness of various rules on drones or model aircraft (% of yes)

You must apply to Transport Canada to obtain a Special Flight Operations Certificate OR be eligible for an exemption if your operation is low-risk — 50%

Figure 25. Answer to question 21: Were you aware of the following rules on drones or model aircraft currently in force in Canada? Base: Respondents flying drones or model aircraft for work or research (n=153)

Table 46. Awareness of various rules on drones and model aircraft by type of drones users

Q21. Were you aware of the following rules on drones or model aircraft currently in force in Canada? % of YES Base: Respondents flying drones or model aircraft for work or research (n=153)	Total	Owner	Non-owner
n= (weighted)	148	64	84
n= (unweighted)	153	71	82

You must apply to Transport Canada to obtain a Special Flight Operations Certificate OR be eligible for an exemption if your operation is low-risk	50%	**65%+**	**38%-**

Generally speaking, six respondents out of ten weren't aware there are new drone regulations coming into effect June 1, 2019 (64%). Of all the respondents, 27% of them were aware of the new regulations.

Drone owners are more likely to be aware of the changes that are coming in regards to the drone regulations (32%). Respondents flying drones for both recreational and work or research purposes are more likely to be aware of the new drone regulations coming into effect (39%). Opposite to that, recreational users are more likely not to be aware of the new regulations coming into effect (68%).

Awareness of the new drone regulations

27%
9%
64%

■ Yes   ■ No   ■ DNK / Refusal
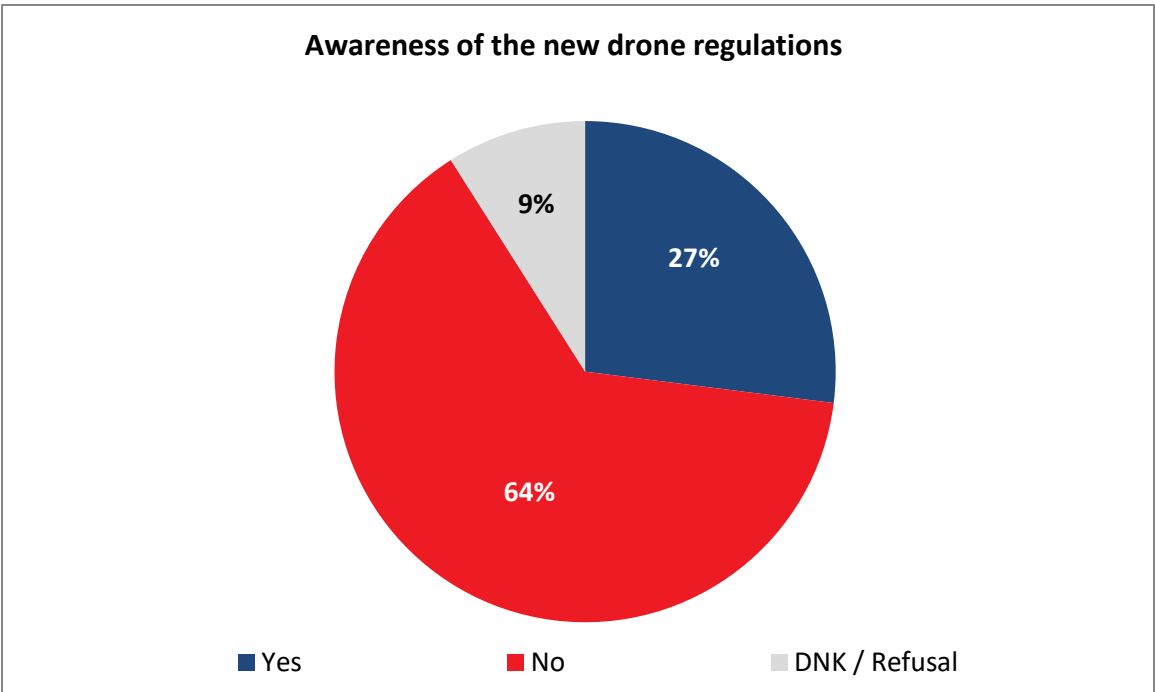
Figure 26. Answer to question 22: Did you know, or have you heard about the NEW drone regulations that will come into effect June 1, 2019? Base: All respondents (n=700)

Table 47. Awareness of the new drone regulations by type of drones users

Q22. Did you know or have you heard about the NEW drone regulations that will come into effect June 1, 2019? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Yes	27%	**32%+**	**18%-**
No	64%	62%	68%
DNK / Refusal	9%	**6%-**	**14%+**

Table 48. Awareness of the new drone regulations by drone usage purpose

Q22. Did you know or have you heard about the NEW drone regulations that will come into effect June 1, 2019? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Yes	27%	**25%-**	30%	**39%+**
No	64%	**68%+**	56%	**47%-**
DNK / Refusal	9%	**8%-**	14%	14%

Generally speaking, a majority of the respondents who stated they were aware of the new regulations coming into effect don't have a clear understanding of what those regulations will bring. Indeed, when asked to explain in their own words what changes the new regulations will bring once they take effect, 6 respondents out of 10 (61%) said they either didn't know or preferred not to answer.

The main thing that was understood is that it will now require a permit (or certification) to fly drones of a certain weight and size (11%). Some respondents also brought up the fact that the new regulations will make it safer to fly drones and minimize accidents since the environment will be more controlled (6%).

Results show that drone owners are less likely to think the new regulations will bring more safety (4%). On their end, non-owners are more likely to think they will (14%).
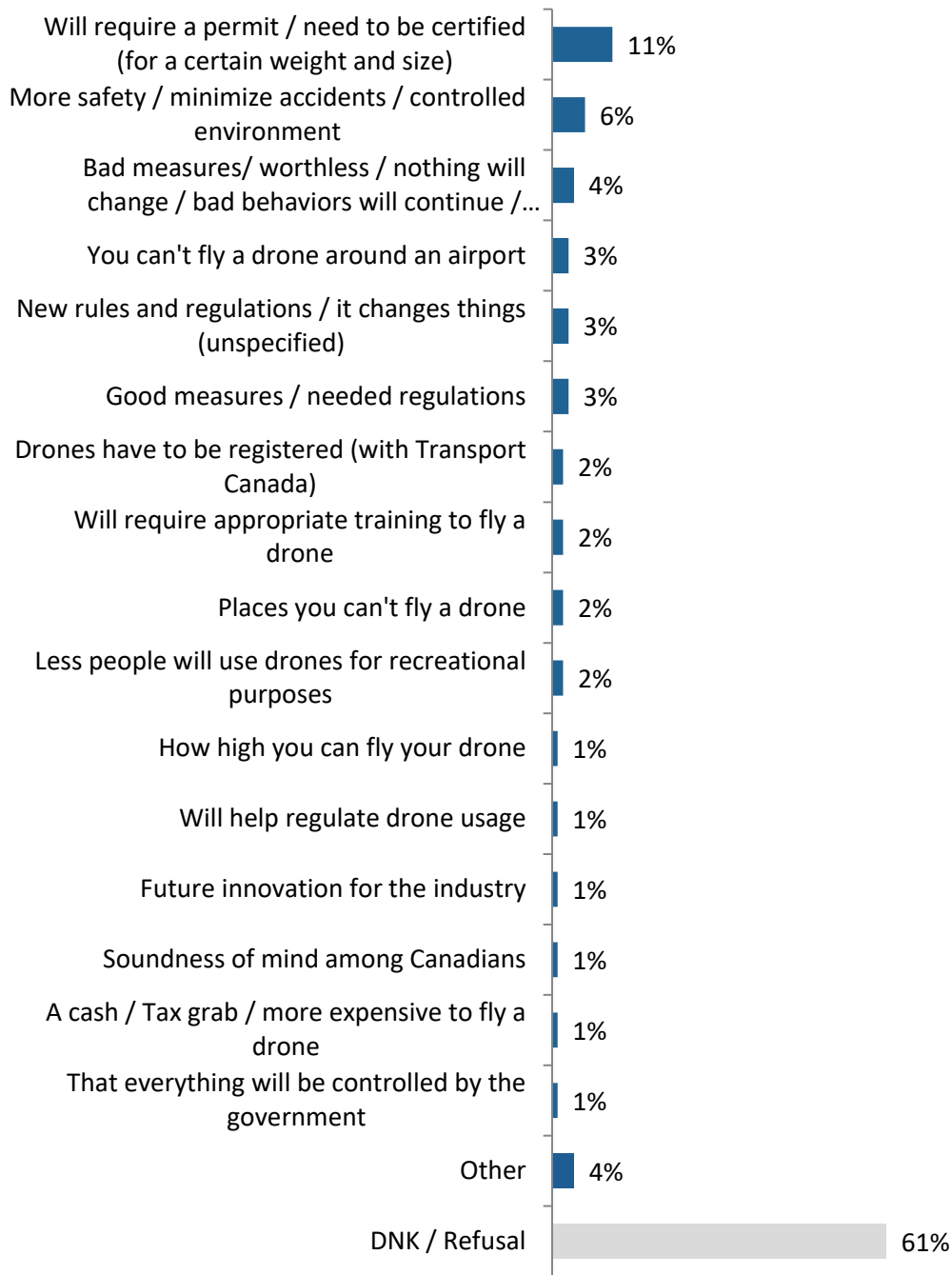
Understanding of the changes in the new regulations

Response	Percentage
Will require a permit / need to be certified (for a certain weight and size)	11%
More safety / minimize accidents / controlled environment	6%
Bad measures/ worthless / nothing will change / bad behaviors will continue /…	4%
You can't fly a drone around an airport	3%
New rules and regulations / it changes things (unspecified)	3%
Good measures / needed regulations	3%
Drones have to be registered (with Transport Canada)	2%
Will require appropriate training to fly a drone	2%
Places you can't fly a drone	2%
Less people will use drones for recreational purposes	2%
How high you can fly your drone	1%
Will help regulate drone usage	1%
Future innovation for the industry	1%
Soundness of mind among Canadians	1%
A cash / Tax grab / more expensive to fly a drone	1%
That everything will be controlled by the government	1%
Other	4%
DNK / Refusal	61%

Figure 27. Answer to question 23: Please explain in your own words what changes these new regulations will bring once they take effect?
Base: Respondents who know or heard about the new drone regulations (n=204)

Table 49. Understanding of the changes in the new regulations by type of drones users

Q23. Please explain in your own words what changes these new regulations will bring once they take effect. Spontaneous mentions Base: Respondents who know or heard about the new drone regulations	Total	Owner	Non-owner
n= (weighted)	186	138	48
n= (unweighted)	204	150	54
Will require a permit / need to be certified (for a certain weight and size)	11%	10%	13%
More safety / minimize accidents / controlled environment	6%	**4%-**	**14%+**
Bad measures/ worthless / nothing will change / bad behaviors will continue / penalize good users	4%	4%	2%
You can't fly a drone around an airport	3%	3%	3%
New rules and regulations / it changes things (unspecified)	3%	4%	1%
Good measures / needed regulations	3%	3%	3%
Drones have to be registered (with Transport Canada)	2%	1%	4%
Will require appropriate training to fly a drone	2%	2%	3%
Places you can't fly a drone	2%	1%	4%
Less people will use drones for recreational purposes	2%	1%	4%
How high you can fly your drone	1%	2%	0%
Will help regulate drone usage	1%	0%	1%
Future innovation for the industry	1%	0%	2%
Soundness of mind among Canadians	1%	**0%-**	**3%+**
A cash / tax grab / more expensive to fly a drone	1%	1%	0%
Everything will be controlled by the government	1%	2%	0%
Other	4%	3%	5%
DNK / Refusal	61%	**64%+**	**54%-**

Table 50. Understanding of the changes in the new regulations by drone usage purpose

Q23. Please explain in your own words what changes these new regulations will bring once they take effect. Spontaneous mentions Base: Respondents who know or heard about the new drone regulations	Total	Recreational	Professional*	Both
n= (weighted)	186	135	24	26
n= (unweighted)	204	145	28	31
Will require a permit / need to be certified (for a certain weight and size)	11%	12%	10%	5%
More safety / minimize accidents / controlled environment	6%	6%	10%	3%

Bad measures/ worthless / nothing will change / bad behaviors will continue / penalize good users	4%	4%	4%	2%
You can't fly a drone around an airport	3%	2%	3%	5%
New rules and regulations / it changes things (unspecified)	3%	2%	12%	0%
Good measures / needed regulations	3%	3%	0%	3%
Drones have to be registered (with Transport Canada)	2%	2%	4%	0%
Will require appropriate training to fly a drone	2%	3%	0%	0%
Places you can't fly a drone	2%	2%	3%	0%
Less people will use drones for recreational purposes	2%	2%	4%	0%
How high you can fly your drone	1%	2%	0%	0%
Will help regulate drone usage	1%	1%	0%	0%
Future innovation for the industry	1%	0%	3%	2%
Soundness of mind among Canadians	1%	1%	0%	0%
A cash / tax grab / more expensive to fly a drone	1%	1%	0%	4%
That everything will be controlled by the government	1%	1%	0%	5%
Other	4%	4%	0%	8%
DNK / Refusal	61%	61%	60%	64%

*Given the small number of respondents (n<30) in some categories, data are presented for illustrative purposes only.

Respondents were mostly aware of the new rules on drones and model aircraft prior to taking the survey. Indeed, as you can see in figure 28, six respondents out of ten were aware that "You must keep your drone within your visual line of sight" (62%). Five respondents out of ten knew that "You must not fly your drone near or in emergency situations (e.g. forest fires)" (53%) and that "You must keep your drone out of controlled airspace unless you have an Advanced Drone Pilot certificate" (51%). Four respondents out of ten are aware that "You must fly your drone below 400 feet above ground level" (40%) and that "You must keep your drone at least 30 metres away from bystanders unless you have an Advanced Drone Pilot Certificate" (40%). Finally, three out of ten respondents were also aware of the following rules:

- "You must get a drone pilot certificate for the type of operation you want to fly ('Basic' or 'Advanced')" (33%);
- "You must register any drone that weighs 250 g or more, but not more than 25 kg" (31%); and
- "You must mark your Transport Canada registration number on your drone" (30%).

Drone owners are more likely to be aware of most of the new rules with two exceptions:

- "You must get a drone pilot certificate for the type of operation you want to fly ('Basic' or 'Advanced')"; and
- "You must mark your Transport Canada registration number on your drone."

Based on the purpose of drone usage, recreational only users are less likely to be aware of most of the changes coming in June 2019. The exceptions are "You must keep your drone within your visual line of sight," "You must keep your drone out of controlled airspace unless you have an advanced drone pilot certificate" and "You must not fly you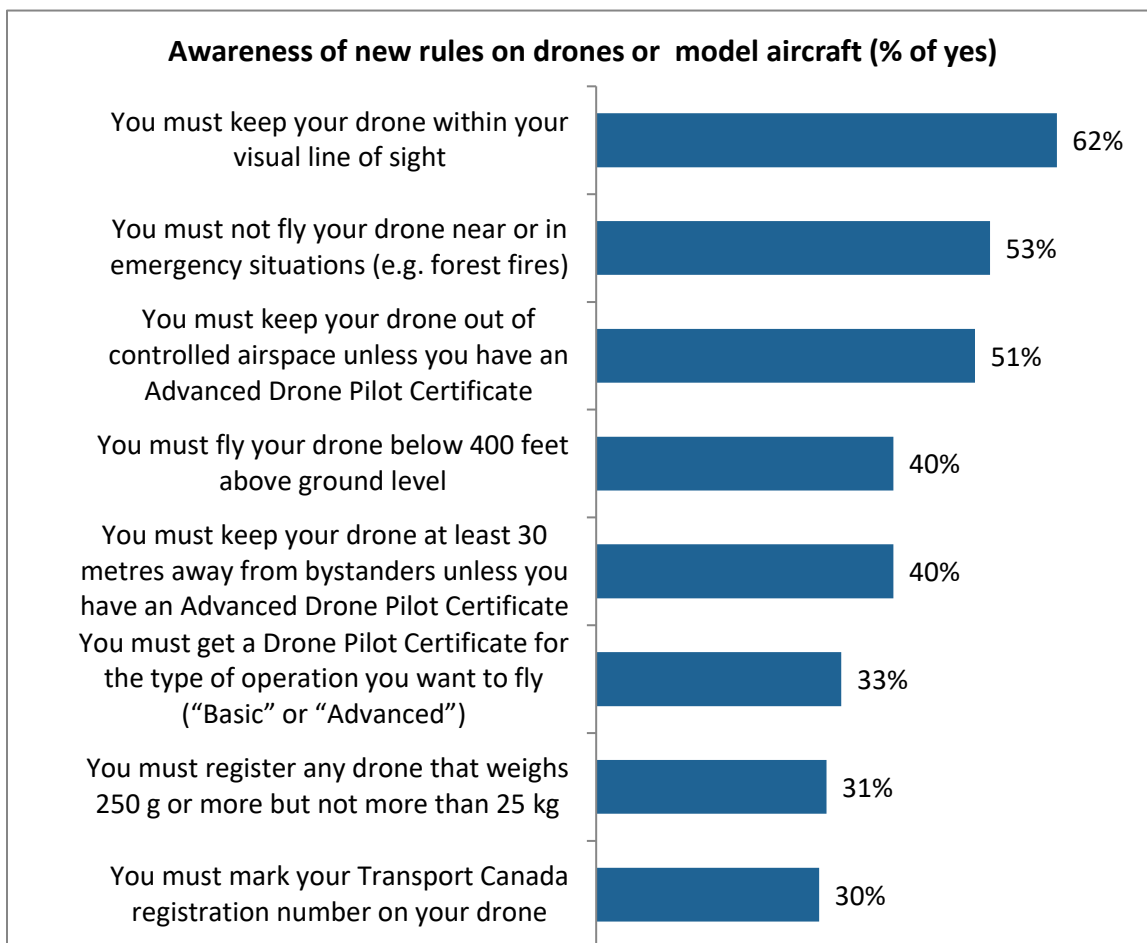r drone near or in emergency situations (e.g. forest fires)." Users who only fly drones for work or research purposes are more likely to be aware that "You must mark your Transport Canada registration number on your drone" (40%). At their end, users who fly drones for both purposes are more likely to be aware of most of the new changes, in exception to:

- "You must keep your drone within your visual line of sight";
- "You must keep your drone at least 30 metres away from bystanders unless you have an advanced drone pilot certificate";

- You must keep your drone out of controlled airspace unless you have an advanced drone pilot certificate"; and
- "You must not fly your drone near or in emergency situations (e.g. forest fires)."

Awareness of new rules on drones or model aircraft (% of yes)

Rule	%
You must keep your drone within your visual line of sight	62%
You must not fly your drone near or in emergency situations (e.g. forest fires)	53%
You must keep your drone out of controlled airspace unless you have an Advanced Drone Pilot Certificate	51%
You must fly your drone below 400 feet above ground level	40%
You must keep your drone at least 30 metres away from bystanders unless you have an Advanced Drone Pilot Certificate	40%
You must get a Drone Pilot Certificate for the type of operation you want to fly ("Basic" or "Advanced")	33%
You must register any drone that weighs 250 g or more but not more than 25 kg	31%
You must mark your Transport Canada registration number on your drone	30%

Figure 28. Answer to question 24: Were you aware, prior to taking this survey, of the following changes coming in June 2019? Base: All respondents (n=700)

Table 51. Awareness of new rules on drones and model aircraft by type of drones users

Q24. Were you aware, prior to taking this survey, of the following changes coming in June 2019? % of YES Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
You must keep your drone within your visual line of sight	62%	**67%+**	**55%-**
You must not fly your drone near or in emergency situations (e.g. forest fires)	53%	**58%+**	**46%-**
You must keep your drone out of controlled airspace unless you have an advanced drone pilot certificate	51%	**55%+**	**44%-**
You must fly your drone below 400 feet above ground level	40%	**45%+**	**33%-**

You must keep your drone at least 30 meters away from bystanders unless you have an advanced drone pilot certificate	40%	**45%+**	**33%-**
You must get a drone pilot certificate for the type of operation you want to fly ("Basic" or "Advanced")	33%	36%	30%
You must register any drone that weighs 250 g or more but not more than 25 kg	31%	**34%+**	**26%-**
You must mark your Transport Canada registration number on your drone	30%	32%	27%

Table 52. Awareness of new rules on drones and model aircraft by drone usage purpose

Q24. Were you aware, prior to taking this survey, of the following changes coming in June 2019? % of YES Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
You must keep your drone within your visual line of sight	62%	64%	57%	60%
You must not fly your drone near or in emergency situations (e.g. forest fires)	53%	53%	51%	61%
You must keep your drone out of controlled airspace unless you have an advanced drone pilot certificate	51%	50%	50%	56%
You must fly your drone below 400 feet above ground level	40%	**38%-**	46%	**54%+**
You must keep your drone at least 30 meters away from bystanders unless you have an advanced drone pilot certificate	40%	**38%-**	49%	48%
You must get a drone pilot certificate for the type of operation you want to fly ("Basic" or "Advanced")	33%	**30%-**	43%	**54%+**
You must register any drone that weighs 250 g or more but not more than 25 kg	31%	**28%-**	35%	**45%+**
You must mark your Transport Canada registration number on your drone	30%	**27%-**	**40%+**	**44%+**

2.8   Communications channels

Two out of ten respondents who look for the latest trends about drones and model aircraft will do so on the Internet through a search engine (20%). YouTube channels are also a source of information for 14% of the respondents as well as other social media platforms, whether it is Facebook or any other (6%).

Drone owners are less likely to have information on the latest trends about drones and model aircraft from their friends or colleagues, even if they are pilots (0%). Recreational users are more likely to search for the latest trends directly on the Internet through a search engine (22%). Users who fly drones for both recreational purposes and work or research purposes are less likely to search for the latest trends about drones and model aircraft on YouTube channels (5%).

Source of information for the latest trends about drones and model aircraft

Source	Percent
Internet / Google	20%
YouTube channels	14%
Social media	5%
Blogs / Forums / Online reviews	2%
Magazines	2%
Facebook	1%
Friends / Colleagues / Pilots	1%
Stores / Retailers	1%
Drones or model aircraft websites	1%
Manufacturer's website	1%
Other	2%
Not interested / no need / I don't go...	2%
DNK / Refusal	56%

Figure 29. Answer to question 28: Where do you go to find the latest trends about drones and model aircraft (e.g. magazines, Internet, social media, Youtubers – please be specific)?
Base: All respondents (n=700)

Table 53. Source of information for the latest trends about drones and model aircraft by type of drones users

Q28. Where do you go to find the latest trends about drones and model aircraft (e.g. magazines, internet, social media, Youtubers – please be specific)? Spontaneous mentions Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Internet / Google	20%	21%	18%
YouTube channels	14%	14%	12%
Social media	5%	4%	6%
Blogs / Forums / Online reviews	2%	1%	2%
Magazines	2%	2%	3%
Facebook	1%	1%	0%
Friends / Colleagues / Pilots	1%	**0%-**	**3%+**
Store / Retailers	1%	2%	0%
Drones or model aircraft websites	1%	1%	1%
Manufacturer's website	1%	1%	0%

Not interested / no need / I don't go for trends about drones or model aircraft	2%	2%	3%
Other	2%	3%	2%
DNK / Refusal	56%	55%	59%

Table 54. Source of information for the latest trends about drones and model aircraft by drone usage purpose

Q28. Where do you go to find the latest trends about drones and model aircraft (e.g. magazines, internet, social media, Youtubers – please be specific)? Spontaneous mentions Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Internet / Google	20%	**22%+**	13%	15%
YouTube channels	14%	15%	14%	**5%-**
Social media	5%	5%	4%	5%
Blogs / Forums / Online reviews	2%	2%	2%	0%
Magazines	2%	3%	0%	1%
Facebook	1%	1%	0%	0%
Friends / Colleagues / Pilots	1%	1%	3%	0%
Store / Retailers	1%	1%	0%	0%
Drones or model aircraft websites	1%	1%	2%	0%
Manufacturer's website	1%	1%	1%	1%
Not interested / no need / I don't go for trends about drones or model aircraft	2%	2%	2%	4%
Other	2%	3%	0%	3%
DNK / Refusal	56%	**53%-**	68%	66%

When asked about the best advertising medium to reach drone and model aircraft users, two respondents out of ten thought advertising on TV (26%) and on social media platforms (20%) were the go-to choices. Online ads on drone speciality websites were stated as the best medium by 15% of the respondents.

Drone owners are more likely to think an advertising campaign on TV is the best way for Transport Canada to make sure drone users come across all relevant information regarding safely flying their drone in Canada (30%). The same goes for recreational users (28%). Drone users who fly drones for both recreational and professional purposes are more likely to think the best way to do so is through online ads on drone speciality websites (23%).

Best advertising medium to reach drone and model aircraft users

Medium	Percentage
Advertising campaign on TV	26%
Social media platforms (e.g. Facebook, Instagram, YouTube, etc.)	20%
Online ads on drone specialty websites	15%
Collaboration with Youtubers or influencers	9%
Advertising in specialized retailers (in-store)	7%
Advertising on specialized online retailers' websites	5%
In-person information sessions (e.g. national tour of drone clubs)	5%
By mail / brochures	1%
DNK / Refusal	13%

Figure 30. Answer to question 25: If Transport Canada wanted to make sure that you came across all relevant information regarding safely flying your drone in Canada, what is the best way for them to get that information to you?
Base: All respondents (n=700)

Table 55. Best advertising medium to reach drone and model aircraft users by type of drones users

Q25. If Transport Canada wanted to make sure that you came across all relevant information regarding safely flying your drone in Canada, what is the best way for them to get that information to you? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Advertising campaign on TV	26%	**30%+**	**21%-**
Social media platforms (e.g. Facebook, Instagram, YouTube, etc.)	20%	19%	21%
Online ads on drone specialty websites	15%	14%	16%
Collaboration with Youtubers or influencers	9%	11%	6%
Advertising in specialized retailers (in-store)	7%	7%	7%
Advertising on specialized online retailers' websites	5%	5%	4%
In-person information sessions (e.g. national tour of drone clubs)	5%	5%	3%
By mail / Brochures	1%	1%	0%
DNK / Refusal	13%	**7%-**	**22%+**

Table 56. Best advertising medium to reach drone and model aircraft users by drone usage purpose

Q25. If Transport Canada wanted to make sure that you came across all relevant information regarding safely flying your drone in Canada, what is the best way for them to get that information to you? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Advertising campaign on TV	26%	**28%+**	**15%-**	21%
Social media platforms (e.g. Facebook, Instagram, YouTube, etc.)	20%	21%	17%	13%
Online ads on drone specialty websites	15%	**13%-**	19%	**23%+**
Collaboration with Youtubers or influencers	9%	9%	13%	8%
Advertising in specialized retailers (in-store)	7%	7%	6%	4%
Advertising on specialized online retailers' websites	5%	5%	4%	3%
In-person information sessions (e.g. national tour of drone clubs)	5%	5%	4%	5%
By mail / Brochures	1%	1%	0%	0%

DNK / Refusal	13%	**10%-**	19%	**24%+**

Generally speaking, the preferred format to get information regarding safely flying drones in Canada for four out of ten respondents is online video (46%). Two out of ten respondents would rather get the information through web content (23%). Only one respondent out of ten would prefer to get the information in a booklet or written guide format (17%) and 4% would prefer infographics.

There are no significant differences on the preferred format when looking at the type of user (owner or not) or purpose of use (recreational, professional or both).
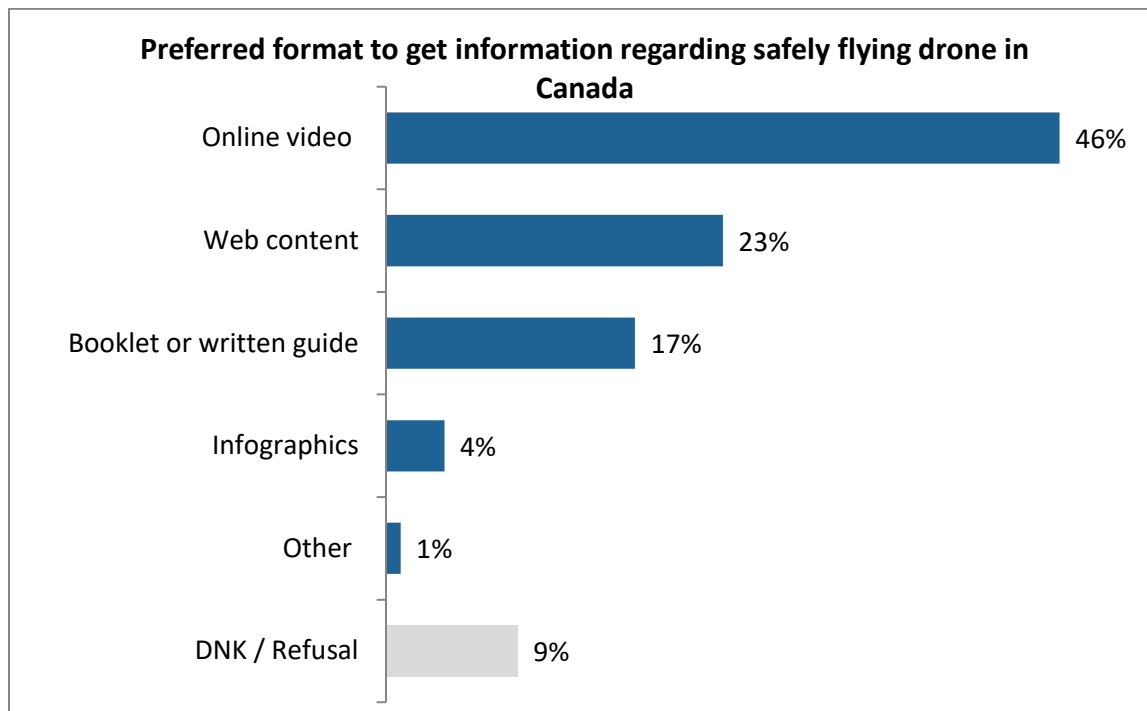
Figure 31. Answer to question 26: In what format would you prefer getting this information to make sure that you take a look at it?
Base: All respondents (n=700)

Table 57. Preferred format to get information regarding safely flying drone in Canada by type of drones users

Q26. In what format would you prefer getting this information to make sure that you take a look at it? Base: All respondents	Total	Owner	Non-owner
n= (weighted)	700	429	271
n= (unweighted)	700	447	253
Online video	46%	47%	44%
Web content	23%	24%	22%
Booklet or written guide	17%	19%	13%
Infographics	4%	5%	4%
Other	1%	1%	0%
DNK / Refusal	9%	**4%-**	**18%+**

Table 58. Preferred format to get information regarding safely flying drone in Canada by drone usage purpose

Q26. In what format would you prefer getting this information to make sure that you take a look at it? Base: All respondents	Total	Recreational	Professional	Both
n= (weighted)	700	552	81	67
n= (unweighted)	700	547	82	71
Online video	46%	48%	42%	35%
Web content	23%	23%	24%	24%
Booklet or written guide	17%	18%	16%	9%
Infographics	4%	4%	6%	4%
Other	1%	1%	0%	0%
DNK / Refusal	9%	**8%-**	**11%+**	**28%+**

Appendix A – Detailed research methodology

A.1 Quantitative methodology

Online survey

This consumer research was conducted via online surveys, using Computer Aided Web Interviewing (CAWI) technology. Fieldwork for the survey was carried out from February 25 to March 6, 2019. A total of 700 Canadians drone users were interviewed.

A pretest of 20 interviews, 10 in French and 10 in English, was completed before the launch of the data collection to validate the programming of the questionnaire.

Since we didn't use an actual probability sampling method, the calculation of the margin of error cannot be done for this project.

Leger adheres to the most stringent guidelines for quantitative research. The survey instrument was compliant with the Standards of Conduct of Government of Canada Public Opinion Research.

Computer Aided Web Interviewing (CAWI)

A panel-based Internet survey with a sample of adult Canadians drone users was conducted by Leger. A total of 700 respondents participated in the survey. Participant selection was made randomly from *LegerWeb*'s online panel.

Leger owns and operates an Internet panel of more than 400,000 Canadians from coast to coast. An Internet panel is made up of web users profiled on different sociodemographic variables. The majority of Leger's panel members (61%) have been recruited randomly over the phone over the past decade, making it highly similar to the actual Canadian population on many demographic characteristics.

Since an Internet sample (from the panel) is non-probabilistic in nature, the margin of error does not apply.

LegerWeb online panel

For several years now, Leger has been conducting surveys via the Internet and this method is increasingly preferred because of the speed of operation, the flexibility it allows, particularly by the introduction of visuals and reliability of results.

Our testing reveals that results obtained in web surveys concord statistically with those obtained in phone surveys. The validity of online surveys rests on three determining factors:

1. validity of respondents
2. validity of responses
3. expertise of a team dedicated to online surveys

The validity of respondents

Our online surveys are conducted with a panel of Internet users. Our panel has 400,000 Canadians and grows each month by 10,000 new panellists. This impressive panel allows us to conduct surveys with the public, but also with specific clienteles. For example, some segments of the population are more difficult to reach, such as people who travel a lot, workers, young people, consumers of specific products, and so on. This volume provides close sample control and strict quality control measures.

To ensure the most representative respondents for our online surveys, we have developed a proven sampling method. By cross tabulating data relating to gender, age, language and region, we can establish a target group, minimize margins of error, and provide a better respect of quotas or eligibility criteria.

Internet users who make up our panel were recruited through complementary methods:

- telephone recruitment;
- e-mail invitations;
- links between sites; and

- invitations using a reference system.

Data from our panel is secured though a private system accessed with a password that panellists receive when invited to answer an online survey.

To foster participation and increase response rates, each panellist invited to answer a questionnaire online has a chance to win a prize drawn each month.

Moreover, to guarantee respondent quality, the *LegerWeb* team manages the panel database on a continual basis.

The validity of responses

By answering an online survey, participants feel they represent an anonymous portion of a targeted group, providing reassurance regarding response confidentiality and validity. Also, the questionnaire must be designed with a minimum number of clicks and a reasonable number of questions because experience has shown that after a certain amount of time respondents lose interest and no longer concern themselves with answering properly.

In addition, a pre-test with twenty Internet users is essential to catch any skip errors between questions, to respect screening criteria, and to check navigation fluidity from one question to the next and interview duration. During the pre-test, panellists are invited to provide comments after having answered the questionnaire. This information is not only very useful but may also be used to improve the questionnaire.

A process of elimination is applied to avoid keeping a questionnaire in which question fatigue ratios are detected at the end of the questionnaire.

The expertise of a team dedicated to online surveys

The *LegerWeb* team includes about ten professionals and technicians who specialize in information technology and e-marketing and who ensure follow-ups from 8:00 AM to 7:00 PM every day of the week. Most members of our team come from the fields of telephone polling or face-to-face interviews and draw on their mastery of the art of the interview.

With its customer support, the *LegerWeb* team provides panellists with all the technical information and assistance they may need when answering an online survey.

The *LegerWeb* team works in close collaboration with the research and statistics teams and shares all pertinent information concerning a polling project. Constant communication allows us to proceed very quickly, to detect errors or problems as soon as they arise and to resolve them in record time.

Software developed by the *LegerWeb* team to conduct online surveys was designed to allow maximum flexibility, efficiency and security when administering the questionnaire. Furthermore, the team performs continuous monitoring of each online survey.

Leger uses the most recent innovations in the field of online surveys and acts in full knowledge of the limits and possibilities of research performed through online surveys.

Finally, it should be specified that Leger strives to develop its expertise in online polling by implementing the same quality standards and criteria from its renowned telephone surveys.

Also, for all our quantitative research projects, Leger has established quality control measures that are identical to the ISO process, in which all stages are verified, allowing us to verify previous stages as well. The quality assurance process is based on the following elements:

- Designating a project manager responsible for final product quality to avoid diluting responsibility internally;

- Scrupulously verifying how well client objectives match the final questionnaire, making sure that each dimension is found in the questionnaire;

- Verifying how each question is formulated, from the perspective of simplicity of expression, the unequivocal meaning of the syntax according to the specific idea to be covered during the interview;

- Verifying the effects of contamination a priori, i.e., that the location of each question in the survey overall does not have undue effects on the following responses (generally by providing information indirectly to respondents, making the sample unrepresentative);

- Closely verifying the computerized version of the questionnaire with the reference questionnaire approved by the client;

- Before the pre-test, verifying programmed skips in the computerized system;

- Conducting a pre-test, which allows to verify comprehension of questions and concepts, possible ambiguities, and logical question skips, etc.;

- The highly vigilant *LegerWeb* team detects all questions with problems while on field;

- The use of software prevents data entry errors, non-established skips, etc., logical validation is therefore done beforehand and not after the fact;

- Coding of open-ended questions is done with a first sample selection of responses on file and by setting up the codes, which are submitted to the client for approval.

We consider that the implementation of all these procedures is a guarantee of optimal quality when conducting online surveys.

Data cleaning

Upon completion of data collection, Leger's data analysts and data processing department cleaned the data thoroughly, ensuring that:

- all closed-ended questions were within the allowable or logical range (allowable ranges would be confirmed with the client in any circumstance where it is not obvious from the questionnaire);

- outliers were verified and, if necessary, excluded from the data;

- all skip patterns had been followed correctly;

- the data was complete (except where it is intentional and within client expectations); and

- information was consistent and logical across questions, with no contradictions in the data.

The data was checked and cleaned after the first night of field and at project completion. During analysis, all numbers were double-checked, and any outliers were also double-checked to ensure the data has been entered accurately in the first place. If necessary, the original phone call could be reviewed to check the answer.

Final sample distribution

The survey was conducted with a voluntary panel sample of adults. Special attention was still given when extracting the sample to ensure a distribution of respondents that is representative of the general population, while ensuring a minimum number of them in every region of the area. The following table shows the target distribution of respondents across the regions and other demographic characteristics.

Table A1: Distribution of respondents by gender

Gender	Final drone users sample	General population representative sample
Weighted totals:	700	4484
Unweighted totals:	700	4484
Male	68%	48%

Female	31%	51%

Table A2: Distribution of respondents by age group

Age group	Final drone users sample	General population representative sample
Weighted totals:	700	4484
Unweighted totals:	700	4484
18-24	19%	11%
25-34	26%	16%
35-44	21%	16%
45-54	15%	18%
55-64	12%	17%
65-74	5%	16%
75+	1%	5%

Table A3: Distribution of respondents by mother tongue

First language	Final drone users sample	General population representative sample
Weighted totals:	700	4484
Unweighted totals:	700	4484
English	76%	21%
French	13%	56%
Other	11%	23%

Table A4: Distribution of respondents by presence of children under 12 in the household

Children under 12	Final drone users sample	General population representative sample
Weighted totals:	700	4484
Unweighted totals:	700	4484
Yes	44%	27%
No	56%	72%

Table A5: Distribution of respondents across regions

Regions	Final drone users sample	General population representative sample
Weighted totals:	700	4484

Unweighted totals:	700	4484
Atlantic	7%	7%
Quebec	18%	23%
Ontario	43%	38%
Prairies (MB,SK)	6%	7%
Alberta	13%	11%
British-Columbia + Territories	13%	14%

Table A6: Distribution of respondents by education level

Education level	Final drone users sample	General population representative sample
Weighted totals:	700	4844
Unweighted totals:	700	4844
Elementary / High school	30%	34%
College	40%	36%
University	30%	23%

Weighting of the results

The results of the Internet survey were weighted by gender, age, region and first language (based on the results of the 2016 census) in order to make them representative of the actual population of Canada.

Profile of respondents and additional socio-demographic analysis

Nevertheless, a basic comparison of the unweighted and weighted samples sizes was conducted to identify potential non-response bias that could be introduced by lower response rates among specific demographic subgroups (see table below). We see that our unweighted sample closely matches the weighted numbers and/or follow the same trends, devised using Statistics Canada updated data.

Table A8: Profile of respondents with weighted and unweighted totals, by gender

Total	Weighted totals:	Unweighted totals:
Gender	700	700
Male	479	509
Female	220	190

Table A9: Profile of respondents with weighted and unweighted totals, by age group

Total	Weighted totals:	Unweighted totals:
Age group	700	700
18-24	134	130
25-34	184	173
35-44	146	164
45-54	106	122
55-64	86	67
65-74	35	37

| 75+ | 9 | 7 |

Table A10: Profile of respondents with weighted and unweighted totals, by mother tongue

Total	Weighted totals:	Unweighted totals:
Mother tongue	**700**	**700**
English	532	512
French	91	102
Other	77	86

Table A11: Profile of respondents with weighted and unweighted totals, by presence of a children under 12 in the household

Total	Weighted totals:	Unweighted totals:
Children under 12 in the household	**700**	**700**
Yes	307	334
No	390	362

Table A12: Profile of respondents with weighted and unweighted totals, across regions

Total	Weighted totals:	Unweighted totals:
Regions	**700**	**700**
Atlantic	51	55
Quebec	123	131
Ontario	301	280
Prairies (MB, SK)	40	41
Alberta	92	97
British-Columbia + Territories	93	96

Table A13: Profile of respondents with weighted and unweighted totals, by education level

Total	Weighted totals:	Unweighted totals:
Education level	**700**	**700**
Elementary/H.school	213	160
College	278	217
University	208	322

In some places where there are some differences (for example respondents younger than 35 years old), the weighting corrected these differences and restores the true weight in the final results.

However, there is no evidence from the data that having achieved demographic distribution prior to weighting would have significantly changed the results for this study. The relatively small sizes of weights and of the differences in responses between various subgroups suggest that data quality was not affected. The basic weight that was applied (age, gender, region and first language) corrected the initial imbalance for data analysis purposes and no further manipulations were necessary.

As with all research conducted by Leger, contact information was kept entirely confidential and all information that could allow for the identification of participants was removed from the data, in accordance with the Privacy Act of Canada.

Participation rate of the web survey

Below is the calculation of the participation rate to the web survey. It should be noted that this is not a classic calculation of the response rate, given the difference in methodology.

Table A15: Participation rate of the web sample

ITEMS	n=
Total number of invitations sent	23,695
Total number of click on the link	4,635
Number of completed questionnaires	700
Number of screened out	3,764
Number of incomplete	125
Participation rate	**2.95%**

Appendix B – Survey Questionnaire

Transports Canada Drone Survey – Final Questionnaire

Intro – Intro

Survey for the Government of Canada

The Government of Canada has hired Léger to conduct this research survey to gather information on the Canadian population.

The survey takes approximately 12 minutes to complete. Your participation in the study is voluntary and completely confidential. All your answers will remain anonymous and will be combined with responses from all other participants.

To view our privacy policy, click here.

Prov – Prov – ask all

In which province or territory do you live?

British Columbia (BC)
Alberta (AB)
Saskatchewan (SK)
Manitoba (MB)
Ontario (ON)
Quebec (QC)
New Brunswick (NB)
Nova Scotia (NS)
Prince Edward Island (PE)
Newfoundland (NF)
Northwest Territories (NT)
Yukon (YK)
Nunavut (NU)

QAB – QAB – ask if prov = AB

In which region of Alberta do you live?

Calgary (61)
Edmonton (62)
Other regions of Alberta (63)

QBC – QBC – ask if prov = BC

In which region of British Columbia do you live?

Metro Vancouver (70)
Other region in British Columbia (71)

QON – QON – ask if prov = ON

In which region of Ontario do you live?

Hamilton – Niagara Peninsula (50)
Kingston – Pembroke (51)
Kitchener – Waterloo – Barrie (52)
Greater London area (53)
Muskoka – Kawarthas (54)
Northeast (55)
Northwest (56)

Greater Ottawa area (57)
Stratford – Bruce Peninsula (58)
Greater Toronto area (59)
Windsor – Sarnia (60)

Q0QC – Q0QC – ask all

In which region of Quebec do you live?

Bas-Saint-Laurent (1)
Saguenay-Lac-Saint-Jean (2)
Capitale-Nationale (3)
Mauricie (4)
Estrie (5)
Montréal (6)
Outaouais (7)
Abitibi-Témiscamingue (8)
Côte-Nord (9)
Nord-du-Québec (10)
Gaspésie/Îles-de-la-Madeleine (11)
Chaudière-Appalaches (12)
Laval (13)
Lanaudière (14)
Laurentides (15)
Montérégie (16)
Centre-du-Québec (17)

Q0QCA – Q0QCA – ask if Q0QC = 14 (Lanaudière)

Your city of residence may not appear on the list at the next question.

For statistical processing reasons, only certain cities outside of the Island of Montreal are identified. If this is the case, please select the response "other city".

In which city do you live?

L'Assomption (1)
Charlemagne (2)
L'Épiphanie (3)
Lavaltrie (4)
Mascouche (5)
Repentigny (6)
Saint-Sulpice (7)
Terrebonne (8)
Other Lanaudière city (96)

Q0QCB – Q0QCB – ask if Q0QC = 15 (Laurentides)

Your city of residence may not appear on the list at the next question.

For statistical processing reasons, only certain cities outside of the Island of Montreal are identified. If this is the case, please select the response "other city".

In which city do you live?

Blainville (1)
Boisbriand (2)
Bois-des-Filion (3)
Deux-Montagnes (4)

Gore (5)
Kanesatake (6)
Lorraine (7)
Mirabel (8)
Oka (9)
Pointe-Calumet (10)
Rosemère (11)
Saint-Colomban (12)
Sainte-Anne-des-Plaines (13)
Saint-Lin-Laurentides (20)
Sainte-Marthe-sur-le-Lac (14)
Sainte-Thérèse (15)
Saint-Eustache (16)
Saint-Jérôme (17)
Saint-Joseph-du-Lac (18)
Saint-Placide (19)
Other city of Laurentides (96)

Q0QCC – Q0QCC – ask if Q0QC = 16 (Montérégie)

Your city of residence may not appear on the list at the next question.

For statistical processing reasons, only certain cities outside of the Island of Montreal are identified. If this is the case, please select the response "other city."

In which city do you live?

Beauharnois (1)
Beloeil (2)
Boucherville (3)
Brossard (4)
Candiac (5)
Carignan (6)
Chambly (7)
Châteauguay (8)
Coteau-du-Lac (9)
Delson (10)
Hudson (11)
Kahnawake (12)
La Prairie (13)
Léry (14)
Les Cèdres (15)
Les Coteaux (16)
L'Île-Cadieux (17)
L'Île-Perrot (18)
Longueuil (19)
McMasterville (20)
Mercier (21)
Mont-Saint-Hilaire (22)
Notre-Dame-de-l'Île-Perrot (23)
Otterburn Park (24)
Pincourt (25)
Pointe-des-Cascades (26)
Richelieu (27)

Saint-Amable (28)
Saint-Basile-le-Grand (29)
Saint-Bruno-de-Montarville (30)
Saint-Constant (31)
Sainte-Catherine (32)
Saint-Jean-sur-Richelieu (47)
Sainte-Julie (33)
Saint-Isidore (34)
Saint-Lambert (35)
Saint-Lazare (36)
Saint-Mathias-sur-Richelieu (37)
Saint-Mathieu (38)
Saint-Mathieu-de-Beloeil (39)
Saint-Philippe (40)
Saint-Zotique (41)
Terrasse-Vaudreuil (42)
Varennes (43)
Vaudreuil-Dorion (44)
Vaudreuil-sur-le-Lac (45)
Verchères (46)
Other city of Montérégie (96)

Q0QCD – Q0QCD – ask if Q0QC= 3 (Capitale-Nationale)

Your city of residence may not appear on the list at the next question.

For statistical processing reasons, only certain cities on the outskirts of Québec City are identified. If this is the case, please select the response "other city."

In which city do you live?

Ville de Québec (1)
Boischatel (2)
Château-Richer (3)
Fossambault-sur-le-Lac (4)
L'Ancienne-Lorette (5)
L'Ange-Gardien (6)
Lac-Beauport (7)
Lac-Delage (8)
Lac-Saint-Joseph (9)
Neuville (10)
Notre-Dame-des-Anges (11)
Saint-Augustin-de-Desmaures (12)
Saint-François-de-l'Île-d'Orléans (13)
Saint-Gabriel-de-Valcartier (14)
Saint-Jean-de-l'Île-d'Orléans (15)
Saint-Laurent-de-l'Île-d'Orléans (16)
Saint-Pierre-de-l'Île-d'Orléans (17)
Sainte-Brigitte-de-Laval (18)
Sainte-Catherine-de-la-Jacques-Cartier (19)
Sainte-Famille (20)
Sainte-Pétronille (21)
Shannon (22)
Stoneham-et-Tewkesbury (23)

Wendake (24)
Other city of Capitale-Nationale (96)

Q0QCE – Q0QCE – ask if Q0QC = 12 (Chaudière-Appalaches)

Your city of residence may not appear on the list at the next question.

For statistical processing reasons, only certain cities on the outskirts of Québec City are identified. If this is the case, please select the response "other city."

In which city do you live?

Ville de Lévis (1)
Beaumont (2)
Saint-Antoine-de-Tilly (5)
Saint-Henri (3)
Saint-Lambert-de-Lauzon (4)
Other city of Chaudière-Appalaches (96)

Q0QCF – Q0QCF – ask if Q0QCD = 1

Please indicate in which borough you live:

Borough of La Cité-Limoilou (1)
Borough of Sainte-Foy-Sillery-Cap-Rouge (2)
Borough of Les Rivières (3)
Borough of Beauport (4)
Borough of Charlesbourg (5)
Borough of La Haute-St-Charles (Lac-Saint-Charles, Saint-Émile, Loretteville, Les Châtels, Val-Bélair) (6)

Q0QCG – Q0QCG – ask if Q0QCE = 1

Please indicate in which borough you live:

Desjardins (1)
Chutes-de-la-Chaudière-Est (2)
Chutes-de-la-Chaudière-Ouest (3)

Sexe – Sexe – ask all

Please indicate your sex:

Note: As indicated by Statistics Canada, transgender, transsexual, and intersex Canadians should indicate the sex (male or female) with which they most associate themselves.

Male (1)
Female (2)
Other (96)
I prefer not to answer (99)

Age – Age – ask all

How old are you?

Under 18 (0)
Between 18 and 24 (1)
Between 25 and 34 (2)
Between 35 and 44 (3)
Between 45 and 54 (4)
Between 55 and 64 (5)

Between 65 and 74 (6)
75 or older (7)
I prefer not to answer (9)

Langu – Langu – ask all

What is the language you first learned at home in your childhood and that you still understand?

French (1)
English (2)
Other (3)
English and French (7)
French and other (4)
English and other (5)
Other and other (6)
I prefer not to answer (9)

Enfa – Enfa – ask all

Are there any children under 18 years old living in your household?

Yes (1)
No (2)
I prefer not to answer (9)

Scol – Scol – ask all

What is the highest level of formal education that you have completed?

Grade 8 or less (1)
Some high school (2)
High school diploma or equivalent (3)
Registered Apprenticeship or other trades certificate or diploma (4)
College, CEGEP or other non-university certificate or diploma (5)
University certificate or diploma below bachelor's level (6)
Bachelor's degree (7)
Post graduate degree above bachelor's level (9)
I prefer not to answer (8)

Q1 – Q1 – ask all

Which of the following best applies to your current situation? (select all that apply)

Personally, own a drone or other model aircraft that you fly for recreational purposes (1)
Personally, own a drone or other model aircraft that you fly for work or research purposes (2)
Do not own a drone or other model aircraft but you fly them for recreational purposes (3)
Do not own a drone or other model aircraft but you fly them for work or research purposes (4)
You do not personally own a drone or model aircraft but someone else in your household does (5) [terminate]
Neither you nor another person in your household currently own a drone or model aircraft (6) [terminate]
Do not know (98) [terminate]
Prefer not to answer (99) [terminate]

Q2B – Q2B – ask all

You indicated that you fly drones or model aircraft for work or research and/or recreational purposes. How many hours per week do you approximately fly drones or model aircraft?

Less than an hour (1)
Between one hour and 4 hours (2)

Between 5 hours to 9 hours (3)
Between 10 hours and 14 hours (4)
15 hours or more (5)
Do not know (98)
Prefer not to answer (99)

Q2 – Q2 – ask only of those who fly for both recreational and work reasons

You indicated that you fly drones or model aircraft for both work or research and recreational purposes. Thinking about the total number of hours you fly, what is the percentage devoted to professional use versus recreational use?

% recreational (1)   _____

% professional (2)   _____

Q2REF – Q2REF – ask only of those who fly for both recreational and work reasons

Do not know (998)
Prefer not to answer (999)
END   Condition f('Q1').any('1','3') && f('Q1').any('2','4')

Q3 – Q3 – recreational users only

How do you mainly use your drone or model aircraft?

Just for the fun of flying (1)
To film video or take pictures (2)
Other use (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q4 – Q4 – ask all

Where do you most often fly your drone or model aircraft? (select all that apply)

In an urban area (1)
In a suburban area (2)
In a rural area (3)
Do not know (98)
Prefer not to answer (99)

Q5 – Q5 – professional use only

What is your main reason for flying a drone or model aircraft for work or research?

For research/academic research purposes (1)
For agricultural purposes (area surveys or inspections) (2)
Real estate (3)
Inspecting buildings, structures or roofs (area surveys, perimeter scans) (4)
Inspecting infrastructures (pipelines, power lines, railroads, highways) (5)
Filmmaking, videography or photography (6)
Other use (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q6 – Q6 – ask only if Q1 = 1, 2

How many drones or model aircraft do you currently own?

Insert number
Do not know (998)

Prefer not to answer (999)

Q7 – Q7 – ask only if Q1 = 1, 2

Thinking of the drone or model aircraft you now fly most often, where did you purchase it?

In a retail store (in-store purchase) (1)
Online through a retail store (2)
Online through a website specializing in drones (3)
Second-hand (e.g. from a friend, online through Kijiji, etc.) (4)
I built it myself from a kit (5)
I built it myself from parts (6)
Other (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q8 – Q8 – ask only if Q1 = 1, 2 / do not ask if Q7 = 6

What is the make or brand of your drone or model aircraft you fly most often?

DJI (1)
Parrot (2)
3DR (3)
Yuneec (4)
EHang (5)
Walkera (6)
Syma (7)
Autel Robotics (8)
Blade (9)
Great Planes (10)
Sig (11)
Top Flite (12)
Horizon Hobby (13)
Other make or brand (please: specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q9A – Q9A – ask only if Q1 = 1, 2

Do you know the weight of your drone or model aircraft you fly most often?

Yes: [Insert weight in metric system] (grams) (1)   _____

Yes: [Insert weight in imperial system] (pounds) (2)   _____

Q9AREF – Q9AREF – ask only if Q1 = 1, 2

No, do not know the weight of the drone (998)
Prefer not to answer (999)

Q10 – Q10 – ask all

Do you currently belong to a drone or model aircraft club or group?

Yes – please specify (96) _____
No (95)
No, but I'm looking to join one (97)
Do not know (98)
Prefer not to answer (99)

Q11 – Q11 – ask all

How did you learn to fly a drone or model aircraft?

Self-taught (trial and error) (1)
Taught by a friend or colleague (2)
Through instructional videos (YouTube or through a drone company) (3)
Enrolled in a drone-flying class (4)
Through the instruction guide or manual (5)
Other (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q12 – Q12 – ask if Q11=4

You mentioned attending a drone flying class. What kind of class was it?

Online class (1)
In class (e.g. school, community centre) (2)
Do not know (98)
Prefer not to answer (99)

Q13 – Q13 – ask all

Do you have a drone pilot certificate issued by the Government of Canada?

Yes (1)
No (2)
I'm in the process of obtaining one (3)
Do not know (98)
Prefer not to answer (99)

Q14 – Q14 – ask all

Have you ever received training or seen an instructional video specifically on safety relative to flying drones or model aircraft in Canada?

Yes (1)
No (2)
Do not know (98)

Prefer not to answer (99)

Q15 – Q15 – ask all

Have you ever received training or seen an instructional video on Transport Canada's drone safety regulations?

Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

Q16 – Q16 – ask all

Have you ever sought or searched for information on Canadian government regulations regarding drones or model aircraft?

Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

Q17 – Q17 – only ask if Q16=1

Where did you go to find that information? (Select all that apply)

Conducted a search engine query (e.g. Google. Bing, Yahoo, etc.) (1)
Visited the Government of Canada's website (2)
Consulted a hobbyist publication, article or magazine for drone users (3)
Asked a specialized retailer (whether online or in-store) (4)
Visited Transport Canada's website (5)
Conducted a social media search (6)
Searched for drone flight influencer video on regulations (7)
Other sources (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q17B – Q17B – ask if Q17 = 6

You mentioned that you found information regarding Canadian government regulations of drones or model aircraft through a social media search. Please specify which platform(s). (Select all that apply)

Instagram (1)
Facebook (2)
LinkedIn (3)
Twitter (4)
Other (specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q18 – Q18 – ask if transport Canada not answered (#5) at Q17

Have you ever visited the Transport Canada website pages regarding drone?
Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

Q19 – Q19 – ask if Q18 = 1

Please indicate exactly what you were looking for when you visited the Transport Canada website pages about drones?

Information about the current rules and regulations (1)
Information on how to register my drone (2)
Information on getting a drone pilot certificate (3)
Information on how to choose the right drone (4)
Information on drone flight school's (5)
Other (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q20 – Q20 – ask all

How would you rate your level of knowledge of the Transport Canada regulations on drones and model aircraft?

Very knowledgeable (1)
Somewhat knowledgeable (2)
Not very knowledgeable (3)
Not at all knowledgeable (4)
Do not know (98)

Prefer not to answer (99)

Q21 – Q21 – ask all

Were you aware of the following rules on drones or model aircraft currently in force in Canada?

Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

You must fly your drone below 300 feet (90 m) above ground level (1)
You must fly your drone at least 5.6 km from aerodromes and at least 1.9 km from heliports (2)
You must fly your drone outside of controlled airspace (3)
You must fly your drone at least 9 km away from a natural hazard or disaster area (4)
You must keep your drone within visual line of sight (5)
You must apply to Transport Canada to obtain a Special Flight Operations Certificate OR be eligible for an exemption if your operation is low-risk (6)

Q22 – Q22 – ask all

Did you know or have you heard about the NEW drone regulations that will come into effect June 1, 2019?

Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

Q23 – Q23 – only ask if Q22 = 1

Please explain in your own words what changes these new regulations will bring once they take effect? [td {vertical-align: top;}]
Your answer:

(96)_____
Do not know (98)
Prefer not to answer (99)

Q24 – Q24 – ask all

Were you aware, prior to taking this survey, of the following changes coming in June 2019?

Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

You must fly your drone below 400 feet above ground level (1)
You must keep your drone within your visual line of sight (2)
You must register any drone that weighs 250 g or more but not more than 25 kg (3)
You must get a drone pilot certificate for the type of operation you want to fly ('Basic' or 'Advanced') (4)
You must mark your Transport Canada registration number on your drone (5)
You must keep your drone at least 30 metres away from bystanders unless you have an advanced drone pilot certificate (6)
You must keep your drone out of controlled airspace unless you have an advanced drone pilot certificate (7)
You must not fly your drone near or in emergency situations (e.g. forest fires) (8)

Q25 – Q25 – ask all

If Transport Canada wanted to make sure that you came across all relevant information regarding safely flying your drone in Canada, what is the best way for them to get that information to you?

Advertising campaign on TV (1)
Online ads on drone specialty websites (2)
Collaboration with Youtubers or influencers (3)
Advertising in specialized retailers (in-store) (4)
Advertising on specialized online retailers' websites (5)
Social media platforms (e.g. Facebook, Instagram, YouTube, etc.) (6)
In-person information sessions (e.g. national tour of drone clubs) (7)
Other (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q26 – Q26 – ask all

In what format would you prefer getting this information to make sure that you take a look at it?

Online video (1)
Web content (2)
Booklet or written guide (3)
Infographics (4)
Other (please specify) (96) _____
Do not know (98)
Prefer not to answer (99)

Q27 – Q27 – ask all

Do you have a background in aviation (flying lessons, pilot license or anything related)?

Yes (1)
No (2)
Do not know (98)
Prefer not to answer (99)

Q28 – Q28 – ask all

Where do you go to find the latest trends about drones and model aircraft? (e.g. magazines, internet, social media, Youtubers – please be specific)

Your answer:

(96)_____
Do not know (98)
Prefer not to answer (99)

QSCTDEMO – QSCTDEMO

The following questions are for statistical purposes only.

Occup – Occup – ask all

What is your current main occupation?

N.B. we are referring to paying jobs only.

Even if you are on a sabbatical, maternity/paternity, illness or work-related accident leave, please select your occupation. [td { vertical-align : top; }]

Office worker (cashier, office clerk, accounting clerk, secretary, etc.) (1)

Personnel specialized in sales (insurance agent, salesperson, sales clerk, real estate agent, real estate broker, sales rep, etc.) (2)
Personnel specialized in services (security agent, taxi driver, hairdresser, cook, esthetician, clergy member, military force member, police officer, etc.) (3)
Manual worker (farmer, packer, day labourer, labourer, miner, fisherman, forestry worker, etc.) (4)
Skilled, semi-skilled worker (bricklayer, truck driver, electrician, machine operator, mechanic, painter, etc.) (5)
Science and technologies worker (computer specialist, programmer-analyst, technician, audio-technician, lab technician, etc.) (6)
Professional (archeologist, architect, artist, lawyer, banker, biologist, accountant, consultant, foreman, dentist, etc.) (7)
Manager/administrator/owner (director, administrator, editor, entrepreneur, executive, manager, businessperson, politician, president, self-employed, etc.) (8)
Homemaker (9)
Student (full-time or whose studies take up most of his/her time) (10)
Retired (pre-retired or annuitant) (11)
Unemployed (unemployment, welfare) (12)
Other (96)
I prefer not to answer (99)

Reven – Reven – ask all

Among the following categories, which one best reflects the total INCOME, before taxes, of all the members of your household in 2018?

$19,999 or less (1)
Between $20,000 and $39,999 (2)
Between $40,000 and $59,999 (3)
Between $60,000 and $79,999 (4)
Between $80,000 and $99,999 (5)
$100,000 or more (6)
I prefer not to answer (99)

MessComplete – MessComplete

The questionnaire is now complete.

Thank you for your participation.

Transport Canada – Sondage au sujet des drones – Questionnaire final

Intro – Intro

Sondage pour le Gouvernement du Canada

Le Gouvernement du Canada a mandaté la firme Léger pour un sondage auprès de la population canadienne.

La présente étude prend approximativement 12 minutes à compléter. Votre participation à cette étude est sur une base volontaire et est complètement confidentielle. Toutes vos réponses resteront anonymes et seront combinées aux réponses de tous les autres participants.

Veuillez cliquer ici pour voir nos politiques de confidentialités.

Prov – Prov – poser à tous

Quelle est votre province/territoire de résidence ?

Colombie-Britannique (BC)
Alberta (AB)
Saskatchewan (SK)
Manitoba (MB)
Ontario (ON)
Québec (QC)
Nouveau-Brunswick (NB)
Nouvelle-Écosse (NS)
Ile-du-Prince-Édouard (PE)
Terre-Neuve (NF)
Territoires du Nord-Ouest (NT)
Yukon (YK)
Nunavut (NU)

QAB – QAB – poser si Prov = AB

Dans quelle région de l'Alberta demeurez-vous?

Calgary (61)
Edmonton (62)
Autre région de l'Alberta (63)

QBC – QBC – poser si Prov = BC

Dans quelle région de la Colombie-Britannique habitez-vous?

Région du Grand Vancouver (70)
Autre région de Colombie-Britannique (71)

QON – QON – poser si Prov = ON

Dans quelle région de l'Ontario demeurez-vous ?

Hamilton – Peninsule Niagara (50)
Kingston – Pembroke (51)
Kitchener – Waterloo – Barrie (52)
Grande région de London (53)
Muskoka – Kawarthas (54)
Nord-Est (55)
Nord-Ouest (56)
Grande région d'Ottawa (57)
Stratford – Peninsule Bruce (58)

Grande région de Toronto (59)
Windsor – Sarnia (60)

Q0QC – Q0QC – poser à tous

Dans quelle région du Québec demeurez-vous ?

Bas-Saint-Laurent (1)
Saguenay-Lac-Saint-Jean (2)
Capitale-Nationale (3)
Mauricie (4)
Estrie (5)
Montréal (6)
Outaouais (7)
Abitibi-Témiscamingue (8)
Côte-Nord (9)
Nord-du-Québec (10)
Gaspésie/Îles-de-la-Madeleine (11)
Chaudière-Appalaches (12)
Laval (13)
Lanaudière (14)
Laurentides (15)
Montérégie (16)
Centre-du-Québec (17)

Q0QCA – Q0QCA – poser si Q0QC = 14 (Lanaudière)

Il est possible que votre ville de résidence ne figure pas dans la liste.

Pour des raisons de traitement statistique, seulement certaines villes, en périphérie de l'Ile-de-Montréal, sont identifiées. Si c'est le cas, veuillez choisir la réponse « Autres villes ».

Dans quelle ville demeurez-vous ?

L'Assomption (1)
Charlemagne (2)
L'Épiphanie (3)
Lavaltrie (4)
Mascouche (5)
Repentigny (6)
Saint-Sulpice (7)
Terrebonne (8)
Autres villes de Lanaudière (96)

Q0QCB – Q0QCB – poser si Q0QC = 15 (Laurentides)

Il est possible que votre ville de résidence ne figure pas dans la liste.

Pour des raisons de traitement statistique, seulement certaines villes, en périphérie de l'Ile-de-Montréal, sont identifiées. Si c'est le cas, veuillez choisir la réponse « Autres villes ».

Dans quelle ville demeurez-vous?

Blainville (1)
Boisbriand (2)
Bois-des-Filion (3)
Deux-Montagnes (4)
Gore (5)
Kanesatake (6)

Lorraine (7)
Mirabel (8)
Oka (9)
Pointe-Calumet (10)
Rosemère (11)
Saint-Colomban (12)
Sainte-Anne-des-Plaines (13)
Saint-Lin-Laurentides (20)
Sainte-Marthe-sur-le-Lac (14)
Sainte-Thérèse (15)
Saint-Eustache (16)
Saint-Jérôme (17)
Saint-Joseph-du-Lac (18)
Saint-Placide (19)
Autres villes des Laurentides (96)

Q0QCC – Q0QCC – poser si Q0QC = 16 (Montérégie)

Il est possible que votre ville de résidence ne figure pas dans la liste.

Pour des raisons de traitement statistique, seulement certaines villes, en périphérie de l'Ile-de-Montréal, sont identifiées. Si c'est le cas, veuillez choisir la réponse « Autres villes ».

Dans quelle ville demeurez-vous?

Beauharnois (1)
Beloeil (2)
Boucherville (3)
Brossard (4)
Candiac (5)
Carignan (6)
Chambly (7)
Châteauguay (8)
Coteau-du-Lac (9)
Delson (10)
Hudson (11)
Kahnawake (12)
La Prairie (13)
Léry (14)
Les Cèdres (15)
Les Coteaux (16)
L'Île-Cadieux (17)
L'Île-Perrot (18)
Longueuil (19)
McMasterville (20)
Mercier (21)
Mont-Saint-Hilaire (22)
Notre-Dame-de-l'Île-Perrot (23)
Otterburn Park (24)
Pincourt (25)
Pointe-des-Cascades (26)
Richelieu (27)
Saint-Amable (28)
Saint-Basile-le-Grand (29)

Saint-Bruno-de-Montarville (30)
Saint-Constant (31)
Sainte-Catherine (32)
Saint-Jean-sur-Richelieu (47)
Sainte-Julie (33)
Saint-Isidore (34)
Saint-Lambert (35)
Saint-Lazare (36)
Saint-Mathias-sur-Richelieu (37)
Saint-Mathieu (38)
Saint-Mathieu-de-Beloeil (39)
Saint-Philippe (40)
Saint-Zotique (41)
Terrasse-Vaudreuil (42)
Varennes (43)
Vaudreuil-Dorion (44)
Vaudreuil-sur-le-Lac (45)
Verchères (46)
Autres villes de la Montérégie (96)

Q0QCD – Q0QCD – poser si Q0QC = 3 (Capitale-Nationale)

Il est possible que votre ville de résidence ne figure pas dans la liste.

Pour des raisons de traitement statistique, seulement certaines villes, en périphérie de la ville de Québec sont identifiées. Si c'est le cas, veuillez choisir la réponse « Autres villes ».

Dans quelle ville demeurez-vous ?

Ville de Québec (1)
Boischatel (2)
Château-Richer (3)
Fossambault-sur-le-Lac (4)
L'Ancienne-Lorette (5)
L'Ange-Gardien (6)
Lac-Beauport (7)
Lac-Delage (8)
Lac-Saint-Joseph (9)
Neuville (10)
Notre-Dame-des-Anges (11)
Saint-Augustin-de-Desmaures (12)
Saint-François-de-l'Île-d'Orléans (13)
Saint-Gabriel-de-Valcartier (14)
Saint-Jean-de-l'Île-d'Orléans (15)
Saint-Laurent-de-l'Île-d'Orléans (16)
Saint-Pierre-de-l'Île-d'Orléans (17)
Sainte-Brigitte-de-Laval (18)
Sainte-Catherine-de-la-Jacques-Cartier (19)
Sainte-Famille (20)
Sainte-Pétronille (21)
Shannon (22)
Stoneham-et-Tewkesbury (23)
Wendake (24)
Autres villes de la Capitale-Nationale (96)

Q0QCE – Q0QCE – poser si Q0QC = 12 (Chaudière-Appalaches)

Il est possible que votre ville de résidence ne figure pas dans la liste à la prochaine question.

Pour des raisons de traitement statistique, seulement certaines villes, en périphérie de la ville de Québec sont identifiées. Si c'est le cas, veuillez choisir la réponse « Autres villes ».

Dans quelle ville demeurez-vous ?

Ville de Lévis (1)
Beaumont (2)
Saint-Antoine-de-Tilly (5)
Saint-Henri (3)
Saint-Lambert-de-Lauzon (4)
Autres villes de Chaudière-Appalaches (96)

Q0QCF – Q0QCF – poser si Q0QCD = 1

Veuillez indiquer votre arrondissement de résidence :

Arrondissement La Cité-Limoilou (1)
Arrondissement Sainte-Foy-Sillery-Cap-Rouge (2)
Arrondissement Les Rivières (3)
Arrondissement Beauport (4)
Arrondissement Charlesbourg (5)
Arrondissement La Haute-St-Charles (Lac-Saint-Charles, Saint-Émile, Loretteville, Les Châtels, Val-Bélair) (6)

Q0QCG – Q0QCG – poser si Q0QCE = 1

Veuillez indiquer votre arrondissement de résidence :

Desjardins (1)
Chutes-de-la-Chaudière-Est (2)
Chutes-de-la-Chaudière-Ouest (3)

Sexe – Sexe – poser à tous

Êtes-vous de sexe :

Note : comme indiqué par Statistique Canada, les Canadiens transgenres, transsexuels et intersexués doivent indiquer le sexe (masculin ou féminin) auquel ils s'identifient le plus.

Masculin (1)
Féminin (2)
Autre (96)
Je préfère ne pas répondre (99)

Age – Age – poser à tous

Quel âge avez-vous?

Moins de 18 ans (0)
De 18 à 24 ans (1)
De 25 à 34 ans (2)
De 35 à 44 ans (3)
De 45 à 54 ans (4)
De 55 à 64 ans (5)
De 65 à 74 ans (6)
75 ans ou plus (7)
Je préfère ne pas répondre (9)

Langu – Langu – poser à tous

Quelle est la langue que vous avez apprise en premier lieu à la maison dans votre enfance et que vous comprenez toujours ?

Français (1)
Anglais (2)
Autre (3)
Français et anglais (7)
Français et autres (4)
Anglais et autres (5)
Autres et autres (6)
Je préfère ne pas répondre (9)

Enfa – Enfa – poser à tous

Y a-t-il des enfants de moins de 18 ans vivant dans votre ménage?

Oui (1)
Non (2)
Je préfère ne pas répondre (9)

Scol – Scol – poser à tous

Quel est le niveau de scolarité le plus élevé que vous ayez atteint?

Primaire (8e année ou moins) (1)
Études secondaires non terminées (2)
Diplôme d'études secondaires ou l'équivalent (formation technique, certificats, attestations ou diplômes de perfectionnement) (3)
Apprentissage enregistré ou diplôme ou certificat d'une école de métiers (4)
Collège, CEGEP, ou certificat ou diplôme non universitaire (5)
Certificat universitaire ou diplôme inférieur au baccalauréat (6)
Baccalauréat (7)
Certificat universitaire supérieur au baccalauréat (9)
Je préfère ne pas répondre (8)

Q1 – Q1 – poser à tous

Lequel des énoncés suivants correspond le mieux à votre situation actuelle? (Sélectionnez toutes les réponses qui s'appliquent.)

Je possède personnellement un drone ou un autre aéromodèle que je fais voler à des fins créatives. (1)
Je possède personnellement un drone ou un autre aéromodèle que je fais voler à des fins professionnelles ou de recherche. (2)
Je ne possède pas de drone ou autre aéromodèle, mais j'en fais voler à des fins récréatives. (3)
Je ne possède pas de drone ou autre aéromodèle, mais j'en fais voler à des fins professionnelles ou de recherche. (4)
Je ne possède pas personnellement de drone ou d'aéromodèle, mais une autre personne de mon foyer en possède. (5) [conclure]
Aucune personne dans mon foyer, moi compris, ne possède en ce moment de drone ou d'aéromodèle. (6) [conclure]
Je ne sais pas. (98) [conclure]
Je préfère ne pas répondre. (99) [conclure]

Q2B – Q2B – poser à tous

Vous avez indiqué que vous faisiez voler des drones à des fins professionnelles ou de recherche et/ou à des fins récréatives. Pendant combien d'heures par semaine, en moyenne, faites-vous voler des drones?

Moins d'une heure (1)

Entre 1 et 4 heures (2)
Entre 5 et 9 heures (3)
Entre 10 et 14 heures (4)
15 heures ou plus (5)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q2 – Q2 – demander à ceux qui font voler des drones à des fins récréatives et professionnelles

Vous avez indiqué que vous faisiez voler des drones à des fins professionnelles ou de recherche et à des fins récréatives. Sur la base du nombre total d'heures que vous passez à faire voler des drones, quel pourcentage consacrez-vous à une utilisation professionnelle, d'une part, et à une utilisation récréative, d'autre part?

% à des fins récréatives (1) _____

% à des fins professionnelles (2) _____

Q2REF – Q2REF – demander à ceux qui font voler des drones à des fins récréatives ET professionnelles
Je ne sais pas. (998)
Je préfère ne pas répondre. (999)
Terminer   Condition f('Q1').any('1','3') && f('Q1').any('2','4')

Q3 – Q3 – utilisateurs récréatifs seulement

Quelle utilisation faites-vous généralement de votre drone ou aéromodèle?

Juste pour le plaisir de le faire voler (1)
Pour prendre des vidéos ou des photos (2)
Pour une autre utilisation (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q4 – Q4 – poser à tous

Où faites-vous le plus souvent voler votre drone ou aéromodèle? (Sélectionnez toutes les réponses qui s'appliquent.)
Dans une zone urbaine (1)

En banlieue (2)
En milieu rural (3)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q5 – Q5 – utilisateurs professionnels seulement

Quelle est la principale raison pour laquelle vous faites voler un drone à des fins professionnelles ou de recherche?

À des fins de recherche, de recherche universitaire ou autre (1)
À des fins agricoles (étude ou inspection de zones) (2)
À des fins immobilières (3)
Pour inspecter des bâtiments, des structures ou des toits (étude de zones, balayage de périmètres) (4)
Pour inspecter des infrastructures (pipelines, lignes électriques, voies ferrées, autoroutes) (5)
Pour faire des films ou prendre des vidéos ou des photos (6)
Pour une autre utilisation (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q6 – Q6 – poser si Q1 = 1, 2

Combien de drones possédez-vous en ce moment?

Insérez un nombre

Q6REF – Q6REF – poser si Q1 = 1, 2

Je ne sais pas. (998)
Je préfère ne pas répondre. (999)

Q7 – Q7 – poser si Q1 = 1, 2

Où avez-vous acheté le drone ou l'aéromodèle que vous faites voler le plus souvent?

Dans un commerce de détail (achat en magasin) (1)
En ligne, auprès d'un commerce de détail (2)
En ligne, sur un site Web spécialisé dans les drones (3)
D'occasion (p. ex. d'un ami, en ligne sur Kijiji, etc.) (4)
Je l'ai construit moi-même à partir d'un ensemble prêt-à-monter. (5)
Je l'ai construit moi-même à partir de pièces détachées. (6)
Autre (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q8 – Q8 – poser si Q1 = 1, 2 / ne pas poser si Q7 = 6

Quel est le modèle ou la marque de votre drone ou aéromodèle que vous faites voler le plus souvent?

DJI (1)
Parrot (2)
3DR (3)
Yuneec (4)
EHang (5)
Walkera (6)
Syma (7)
Autel Robotics (8)
Blade (9)
Great Planes (10)
Sig (11)
Top Flite (12)
Horizon Hobby (13)
Autre modèle ou marque (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q9A – Q9A – poser si Q1 = 1, 2

Connaissez-vous le poids de votre drone ou aéromodèle?

Oui : insérer le poids en système métrique (grammes) (1)   _____

Oui : insérer le poids en système impérial (livres) (2)   _____

Q9AREF – Q9AREF – Poser si Q1 = 1, 2

Non, je ne connais pas le poids de mon drone. (998)
Je préfère ne pas répondre. (999)

Q10 – Q10 – poser à tous

Faites-vous, en ce moment, partie d'un club ou d'un groupe consacré aux drones ou aéromodèles?

Oui – veuillez préciser (96) _____
Non (95)

Non, mais je suis en processus de recherche (97)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q11 – Q11 – poser à tous

Comment avez-vous appris à faire voler un drone ou un aéromodèle?

J'ai appris tout seul (essais et erreurs). (1)
C'est un ami ou un collègue qui m'a appris. (2)
J'ai regardé des vidéos éducatives (sur YouTube ou par l'intermédiaire d'une compagnie de drones). (3)
Je me suis inscrit à un cours de pilotage de drone. (4)
Je me suis référé au guide d'instructions ou au manuel. (5)
Autre (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q12 – Q12 – poser si Q11=4

Vous avez indiqué avoir suivi un cours de pilotage de drone. De quel type de cours s'agissait-il?

Un cours en ligne (1)
Un cours en classe (p. ex. dans une école ou dans un centre communautaire) (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q13 – Q13 – poser à tous

Avez-vous un certificat de pilote de drone émis par le gouvernement du Canada?

Oui (1)
Non (2)
Je suis en voie d'en obtenir un. (3)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q14 – Q14 – poser à tous

Avez-vous déjà suivi une formation ou vu une vidéo éducative portant spécifiquement sur la sécurité en matière de pilotage de drones ou d'aéromodèles au Canada?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q15 – Q15 – poser à tous

Avez-vous déjà suivi une formation ou vu une vidéo éducative sur la réglementation de Transports Canada en matière de sécurité des drones?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q16 – Q16 – poser à tous

Avez-vous déjà recherché de l'information sur la réglementation du gouvernement canadien visant les drones et les aéromodèles?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q17 – Q17 – poser si Q16=1

Si oui, comment avez-vous fait pour accéder à cette information? (Sélectionnez toutes les réponses qui s'appliquent)

J'ai utilisé un moteur de recherche (p. ex. Google, Bing, Yahoo, etc.) (1)
Je me suis rendu sur le site Web du gouvernement du Canada. (2)
J'ai consulté une publication, un article ou un magazine amateur destiné aux utilisateurs de drones. (3)
J'ai demandé à un détaillant spécialisé (en ligne ou en magasin). (4)
Je me suis rendu sur le site Web de Transports Canada. (5)
J'ai fait une recherche sur les médias sociaux. (6)
J'ai cherché une vidéo d'influenceur sur le pilotage de drone portant sur la réglementation. (7)
J'ai eu recours à d'autres sources (veuillez préciser). (96)_____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q17B – Q17B – poser si = 6

Vous avez indiqué que vous aviez trouvé de l'information sur la réglementation du gouvernement canadien encadrant l'utilisation des drones ou des aéromodèles au moyen de recherches sur les médias sociaux. Veuillez préciser quelle(s) plateforme(s). (Sélectionnez toutes les réponses qui s'appliquent.)

Instagram (1)
Facebook (2)
LinkedIn (3)
Twitter (4)
Autre (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q18 – Q18 – poser si Transport Canada pas sélectionné (#5) à Q17

Avez-vous déjà consulté les pages du site Web de Transports Canada portant sur les drones?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q19 – Q19 – poser si Q18 = 1

Veuillez indiquer ce que vous cherchiez exactement lorsque vous avez consulté des pages du site Web de Transports Canada portant sur les drones.

De l'information sur les règles et règlements actuels (1)
Comment immatriculer mon drone (2)
Comment obtenir un certificat de pilote de drone (3)
Comment choisir le bon drone (4)
De l'information sur les écoles de pilotage de drones (5)
Autre (veuillez préciser) (96) _____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q20 – Q20 – poser à tous

Comment évalueriez-vous votre niveau de connaissances de la réglementation de Transports Canada encadrant l'utilisation des drones et des aéromodèles?

Très bon (1)
Bon (2)
Pas très bon (3)
Aucune connaissance (4)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q21 – Q21 – poser à tous

Étiez-vous au courant des règles suivantes actuellement en vigueur au Canada sur les drones ou aéromodèles?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

> Vous devez faire voler votre drone à une altitude maximale de 90 mètres (300 pieds). (1)
> Vous devez faire voler votre drone à au moins 5,6 kilomètres des aérodromes et à au moins 1,9 kilomètres des héliports. (2)
> Vous devez faire voler votre drone à l'extérieur d'un espace aérien contrôlé. (3)
> Vous devez faire voler votre drone à au moins 9 kilomètres d'un danger naturel ou d'une zone sinistrée. (4)
> Vous devez garder votre drone dans votre champ de vision. (5)
> Vous devez demander à Transports Canada un certificat d'opérations aériennes spécialisées OU bénéficier d'une exemption si le pilotage de votre drone présente peu de risques. (6)

Q22 – Q22 – poser à tous

Connaissez-vous ou avez-vous entendu parler de la NOUVELLE réglementation sur les drones qui entrera en vigueur le 1er juin 2019?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q23 – Q23 – poser si Q22 = 1

Veuillez expliquer dans vos propres mots les changements que cette nouvelle réglementation entraînera lorsqu'elle entrera en vigueur.

Votre réponse :

(96)_____
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

Q24 – Q24 – poser à tous

Avant de répondre à ce sondage, saviez-vous que ces changements allaient entrer en vigueur en juin 2019?

Oui (1)
Non (2)
Je ne sais pas. (98)
Je préfère ne pas répondre. (99)

> Vous devez faire voler votre drone à moins de 122 mètres (400 pieds) d'altitude. (1)

Vous devez garder votre drone dans votre champ de vision. (2)

Vous devez immatriculer votre drone s'il pèse 250 g ou plus, mais moins de 25 kg. (3)

Vous devez obtenir un certificat de pilote de drone pour le type d'opérations que vous souhaitez (de base ou avancées). (4)

Vous devez inscrire le numéro d'immatriculation de Transports Canada sur votre drone. (5)

Vous devez faire voler votre drone loin des passants, à une distance minimale de 30 mètres, à moins que vous ayez un certificat de pilote – opérations avancées. (6)

Vous devez faire voler votre drone à l'extérieur d'un espace aérien contrôlé, à moins que vous ayez un certificat de pilote – opérations avancées. (7)

Vous devez faire voler votre drone loin des situations d'urgence (p. ex. feux de forêt). (8)

Q25 – Q25 – poser à tous

Si Transports Canada souhaite s'assurer que vous avez accès à toutes les informations pertinentes portant sur l'utilisation sécuritaire d'un drone au Canada, quelle serait pour eux la meilleure manière de vous faire parvenir ces informations?

Campagne publicitaire à la télévision (1)

Publicités en ligne sur des sites Web consacrés aux drones (2)

Collaboration avec des youtubeurs ou des influenceurs (3)

Publicités chez des détaillants spécialisés (en magasin) (4)

Publicités sur les sites Web de détaillants spécialisés en ligne (5)

Plateformes de médias sociaux (p. ex. Facebook, Instagram, YouTube, etc.) (6)

Séances d'information en personne (p. ex. tournée nationale des clubs de drones) (7)

Autre (veuillez préciser) (96) _____

Je ne sais pas. (98)

Je préfère ne pas répondre. (99)

Q26 – Q26 – poser à tous

Sous quelle forme préféreriez-vous obtenir ces informations pour vous assurer de les consulter?

Vidéo en ligne (1)

Contenu Web (2)

Brochure ou guide écrit (3)

Infographie (4)

Autre (veuillez préciser) (96) _____

Je ne sais pas. (98)

Je préfère ne pas répondre. (99)

Q27 – Q27 – poser à tous

Avez-vous de l'expérience en aviation (leçons de vol, permis de pilote ou autre)?

Oui (1)

Non (2)

Je ne sais pas. (98)

Je préfère ne pas répondre. (99)

Q28 – Q28 – poser à tous

Où allez-vous pour trouver les dernières tendances en matière de drones et d'aéromodèles (p. ex. magazines, Internet, médias sociaux, youtubeurs – veuillez être précis)?

Votre réponse :

(96)_____

Je ne sais pas. (98)

Je préfère ne pas répondre. (99)

QSCTDEMO – QSCTDEMO

Les prochaines questions serviront à des fins statistiques seulement.

Occup – Occup – poser à tous

Quelle est votre occupation principale actuelle ?

N.B. on parle d'emploi rémunéré seulement.

Même si vous êtes en congé sabbatique, de maternité/paternité, de maladie ou d'accident de travail, veuillez préciser votre emploi.

Employé(e) de bureau (caissier, commis de bureau, commis comptable, secrétaire, etc.) (1)
Personnel spécialisé dans la vente (agent d'assurances, vendeur, commis-vendeur, agent immobilier, courtier immobilier, représentant, etc.) (2)
personnel spécialisé dans les services (agent de sécurité, chauffeur de taxi, coiffeur, cuisinier, esthéticien, membre clergé, militaire, policier, etc.) (3)
Travailleur manuel (agriculteur, emballeur, journalier, manoeuvre, mineur, pêcheur, travailleur forestier, etc.) (4)
Ouvrier spécialisé/semi-spécialisé (briqueteur, chauffeur de camion, électricien, machiniste, mécanicien, peintre, etc.) (5)
Travailleur des sciences & technologies (informaticien, programmeur-analyste, technicien, technicien-audio, technicien de laboratoire, etc.) (6)
Professionnel (archéologue, architecte, artiste, avocat, banquier, biologiste, comptable, consultant, contremaître, dentiste, designer, etc.) (7)
gestionnaire/administrateur/propriétaire (administrateur, directeur, éditeur, entrepreneur, exécutif, gérant, homme / femme d'affaires, politicien, président, travailleur autonome, etc.) (8)
Au foyer (9)
étudiant(e) (à temps plein ou dont les études constituent l'occupation principale) (10)
retraité(e) (pré-retraité, rentier) (11)
Sans emploi (assurance-emploi, aide sociale, etc.) (12)
Autre (96)
Je préfère ne pas répondre (99)

Reven – Reven – poser à tous

Parmi les catégories suivantes, laquelle reflète le mieux le REVENU total avant impôt de tous les membres de votre foyer pour l'année 2018 ?
19 999 $ et moins (1)
De 20 000 $ à 39 999 $ (2)
De 40 000 $ à 59 999 $ (3)
De 60 000 $ à 79 999 $ (4)
De 80 000 $ à 99 999 $ (5)
100 000 $ et plus (6)
Je préfère ne pas répondre (99)

MessComplete – MessComplete

Merci, vous avez complété le sondage.