1 December 2025

EASTLINK'S SELF-DRIVING & ELECTRIC CAR SURVEY: TRENDS, PREFERENCES AND PERCEPTIONS

The 2025 EastLink Self-Driving & Electric Car Survey – Australia's largest annual study of its kind – reveals a rapidly evolving landscape in motorists' attitudes toward vehicle technology.

With over 5,700 participants, the survey highlights a growing preference for hybrid vehicles, steady but cautious interest in fully electric cars, and a complex mix of excitement and scepticism about self-driving technology.

Key Trends:

- **Hybrid vehicles** remain the top choice for future car buyers, while interest in fully electric vehicles is recovering after a recent dip.
- **Barriers to electric vehicle adoption** are shifting: lack of charging infrastructure, battery lifespan, and recharging time now rival purchase cost as leading concerns.
- **Driver assist features** are increasingly used, but motorists remain wary of functions that take over steering, such as automatic lane changing and active parking assistance.
- **Knowledge and trust in self-driving cars** are gradually increasing, yet safety, legal, and ethical questions persist. Many motorists want more information about how these vehicles operate, their safety record, and who is liable in the event of an accident.
- **Public sentiment** is polarized: While some are excited by the potential for safer, more accessible, and environmentally friendly transport, many remain sceptical, citing concerns about loss of control, cybersecurity, and readiness of infrastructure.
- **Hands-off driving and robotaxis** are slowly gaining acceptance, but most motorists still prefer to retain some level of control or oversight.

This year's results suggest that while the "hype" around self-driving and electric vehicles is stabilizing, the journey toward mainstream adoption will depend on addressing practical barriers, building public trust, and demonstrating real-world benefits.

The survey underscores the importance of continued innovation, transparent communication, and robust regulatory frameworks as Australia moves toward a more connected and sustainable transport future.

EastLink is committed to supporting advancements in self-driving and electric vehicle technologies through its involvement with the Centre for Connected and Automated Transport (CCAT).

As part of that commitment, EastLink sponsored and participated in CCAT's National Future Transport Summit in September 2025. At the Summit, 14 recommendations on maximising the benefits of connected and automated transport were debated and agreed.

The detailed survey results are attached (see overleaf).

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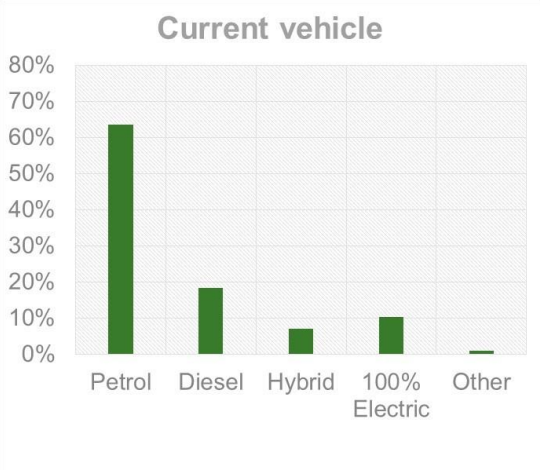
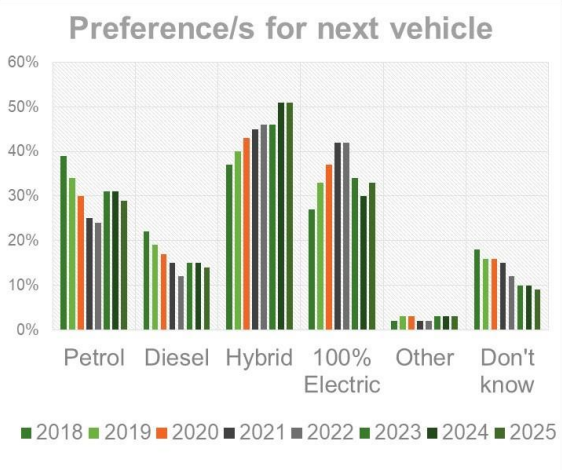
DETAILED SURVEY RESULTS

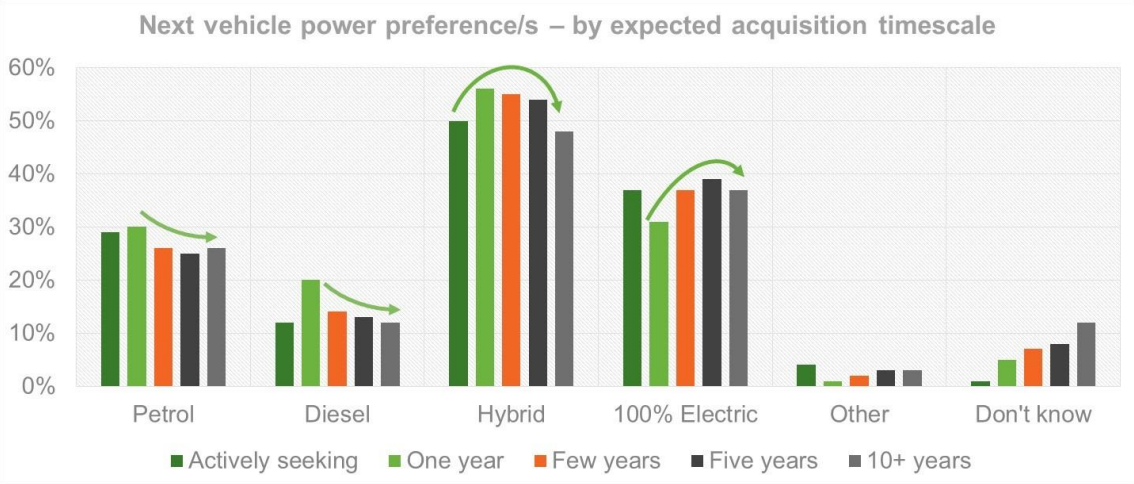
Vehicle power

How is your current vehicle powered? What preference/s do you have for your NEXT vehicle?





- 51% of motorists continue to include hybrid electric in their power preferences for their next vehicle (same 51% as last year and up from 46% in the preceding two years).
- 33% of motorists now include 100% electric in their power preferences (up from 30% last year but still well below its high point of 42% three years ago).
- The preference for petrol has dropped to 29% (from 31% last year, but still well above its low point of 24% three years ago).
- The preference for diesel has also declined to 14% (from 15% last year, but still above its low point of 12% three years ago).



- Hybrid continues to be the most popular power preference for motorists who expect to get

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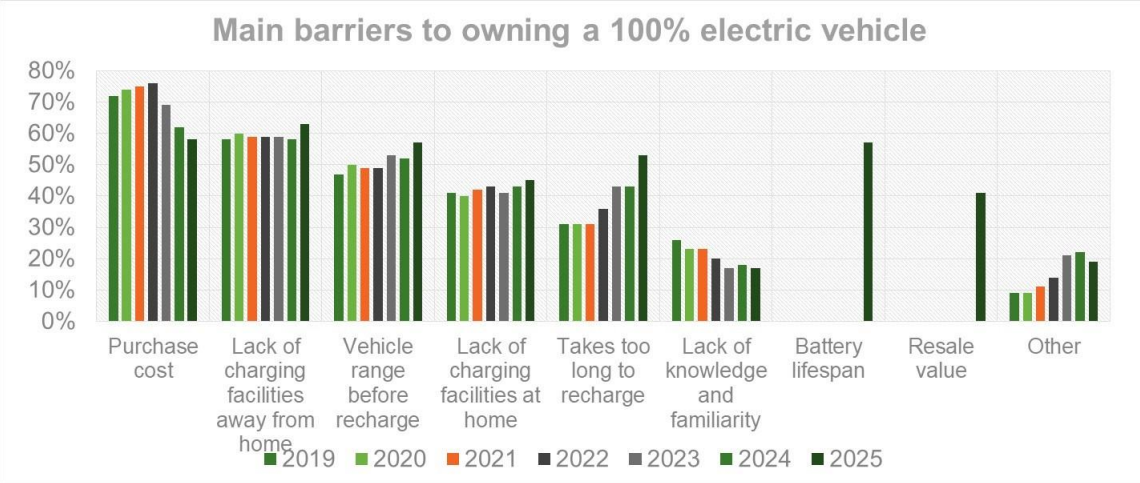
their next vehicle within the next few years.

- Surveys until three years ago indicated that 100% electric was the most popular power preference for motorists who expect to get their next vehicle beyond 5 years.
- However, for the third successive year in this annual survey, the preference for hybrid continues to significantly exceed the preference for 100% electric for motorists who expect to get their next vehicle beyond 5 years.

What do you see as the main barriers to you owning a 100% electric vehicle?



- The lack of charging facilities away from home (63%) is up from 58% which was unchanged since 2019. This is now the leading barrier for the first time.
- Purchase cost (58%) is continuing its steady decline since peaking at 76% three years ago).
- Vehicle range before re-charging (57%) has been increasing steadily since 47% in 2019.
- Included in the survey for the first time, battery lifespan (57%) is also one the leading barriers.
- Takes too long to recharge (53%) has been increasing steadily over the past four years from a previously stable base of 31%.

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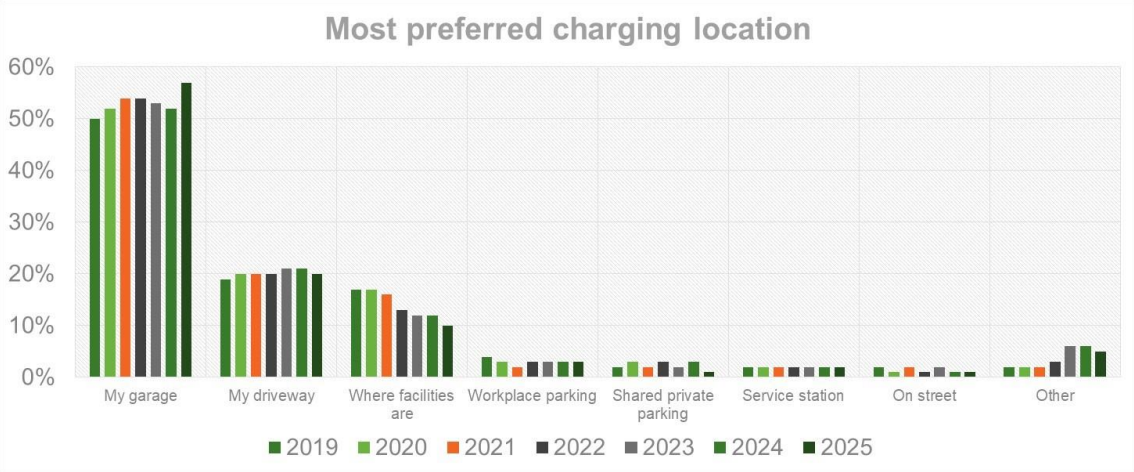
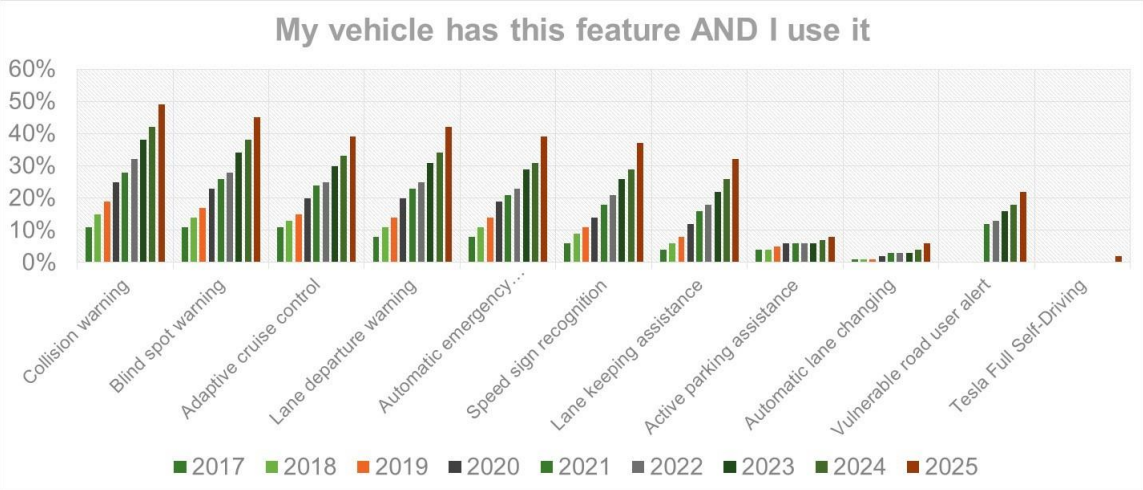
If you owned a 100% battery electric vehicle where would you most prefer to charge it?



- 57% of motorists identified their private garage as their most preferred charging location. This is at a record high.
- A further 20% identified their private driveway as their most preferred charging location, which has remained relatively steady since 2019.

Driver assist functions

Does your CURRENT vehicle have any of the following safety or driver assist functions? If so, do you use them?



- More and more motorists each year are using the latest driver assist functions.
- The exceptions are active parking assistance and automatic lane changing, which are not used much, and for which usage is only slowly increasing.
- With Tesla Full Self-Driving (Supervised) now available in Australia, this function has been included in the survey for the first time. 2% of respondents are using Tesla Full Self-Driving (Supervised). Notably, just over 5% of respondents have a Tesla as their current vehicle.

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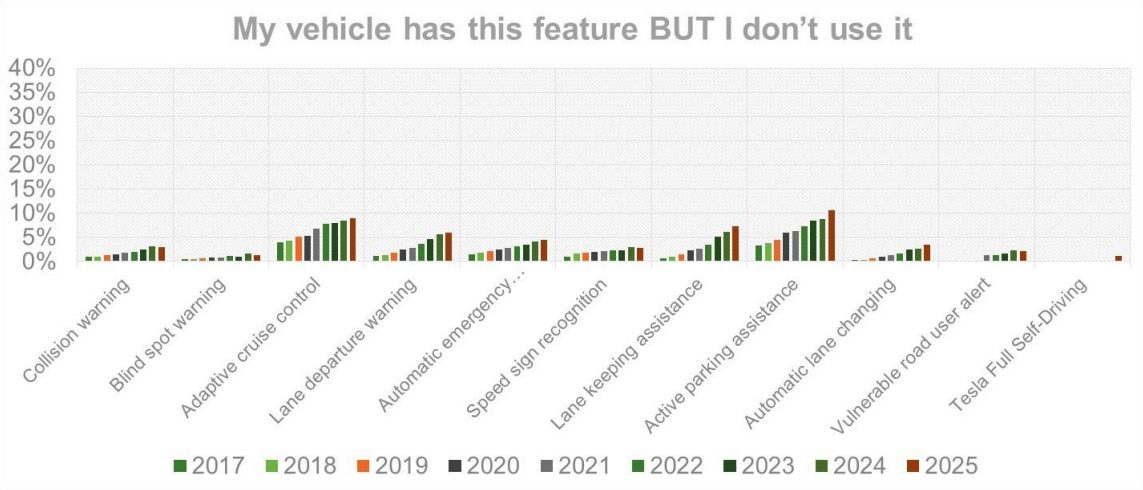
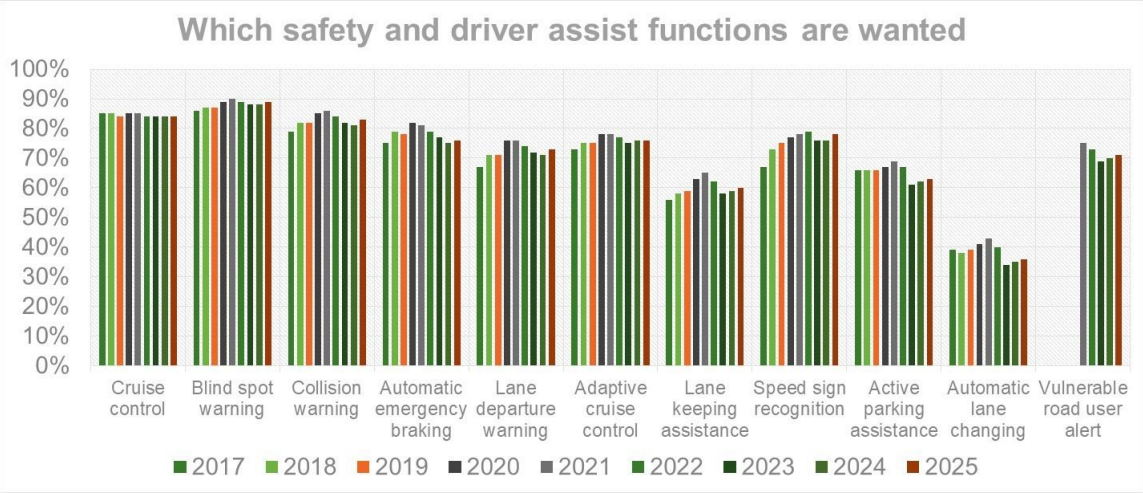


- Compared to other driver assist functions, active parking assistance is much less likely to be used by motorists when these functions are available.
- It is the only driver assist function where the proportion of motorists with this feature who don't use it exceeds the proportion of motorists with this feature who do use it.

Which of the following automated functions would you want in your NEXT vehicle?



- Desirability of most driver assist functions has increased slightly over the past year or two. However they have not yet recovered to their respective peaks three to five years ago.
- The three least wanted features are the three driver assist features that involve steering of the vehicle: automatic lane changing, lane keeping assistance and active parking assistance.

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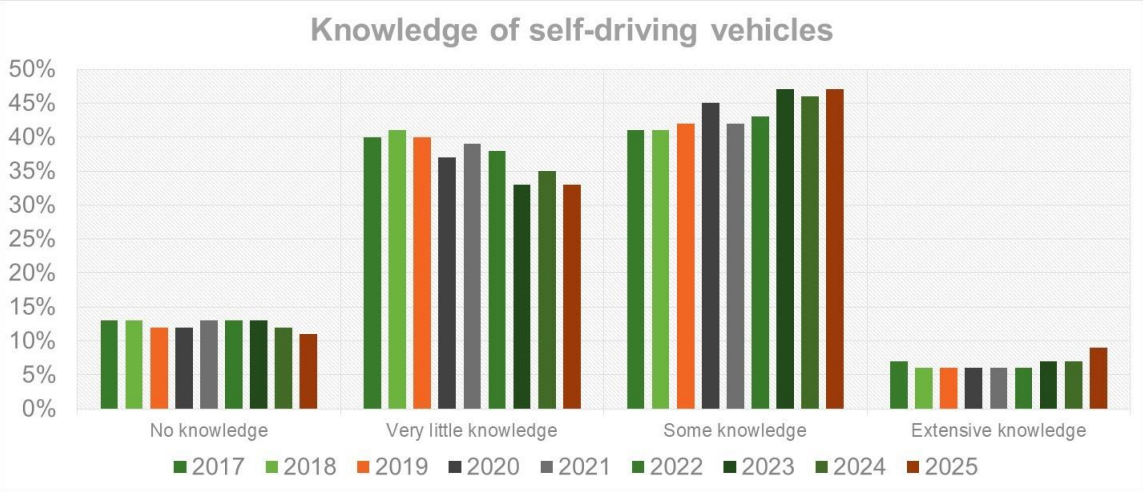
Fully self-driving cars

How much would you say you know about self-driving vehicles?



- Since 2017, the most significant change in motorists' perceptions of their knowledge of self-driving cars has been a steady shift of motorists from "very little knowledge" to "some knowledge".
- A record 9% of respondents now think they have "extensive knowledge", which is a significant increase from the steady 6% during the years 2018 to 2022.
- 47% think they have "no knowledge" or "very little knowledge" of self-driving vehicles, which is now at a record low compared to 54% in 2018.

What respondents would like to know about self-driving vehicles

Qualitative analysis of free text comments made by survey respondents:

1. Safety Concerns

Overwhelming Focus: The vast majority of respondents are concerned about the safety of self-driving vehicles. Questions include:

- Are they safe for drivers, passengers, pedestrians, and cyclists?
- How do they handle unexpected situations, bad weather, poor road conditions, and unpredictable human drivers?
- What are the accident rates and reliability statistics compared to human-driven cars?
- What safety features and redundancies exist to prevent or mitigate failures?
- Can the driver quickly take control in emergencies?
- How do vehicles respond to system malfunctions, loss of power, or hacking attempts?

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Trust Issues: Many respondents express distrust in the technology, citing fears of software bugs, hacking, and the inability of AI to make complex ethical decisions in emergencies.

2. Legal and Regulatory Questions

Legality: There is widespread uncertainty about whether self-driving vehicles are legal in Australia, especially in Victoria.

Liability: Respondents want to know who is responsible in the event of an accident – driver, manufacturer, or software provider.

Insurance: Many are unclear about how insurance works for self-driving vehicles, including coverage, premiums, and claims processes.

Regulation: Questions about government oversight, certification, and the process for approving self-driving vehicles for public use are common.

3. Technology and Operation

Technical Curiosity: Some respondents are interested in how self-driving vehicles work, including:

- The role of sensors, cameras, radar, lidar, and AI.
- How vehicles detect and respond to obstacles, road signs, and animals.
- The accuracy of features like collision avoidance, speed recognition, and lane keeping.
- The ability to operate in various environments (urban, rural, unmarked roads).

Manual Override: Many want assurance that the driver can override the system at any time and are curious about how easy and reliable this process is.

4. Ethical and Social Issues

Decision-Making: Respondents question how AI systems make ethical decisions in unavoidable accident scenarios (e.g., choosing between harming occupants or others).

Impact on Driving Skills: Concerns about drivers losing skills and becoming complacent are frequently mentioned.

Accessibility: Some see potential benefits for people with disabilities or older adults, while others worry about exclusion due to cost.

5. Cost and Accessibility

Affordability: Many respondents are concerned about the high cost of self-driving vehicles and whether they will be accessible to the general public.

Running Costs: Questions about maintenance, insurance, battery life, and charging infrastructure are common.

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6. Environmental Impact

Sustainability: Some respondents ask about the environmental friendliness of self-driving vehicles, including energy consumption, battery disposal, and the impact of mining for battery materials.

7. Integration with Existing Infrastructure

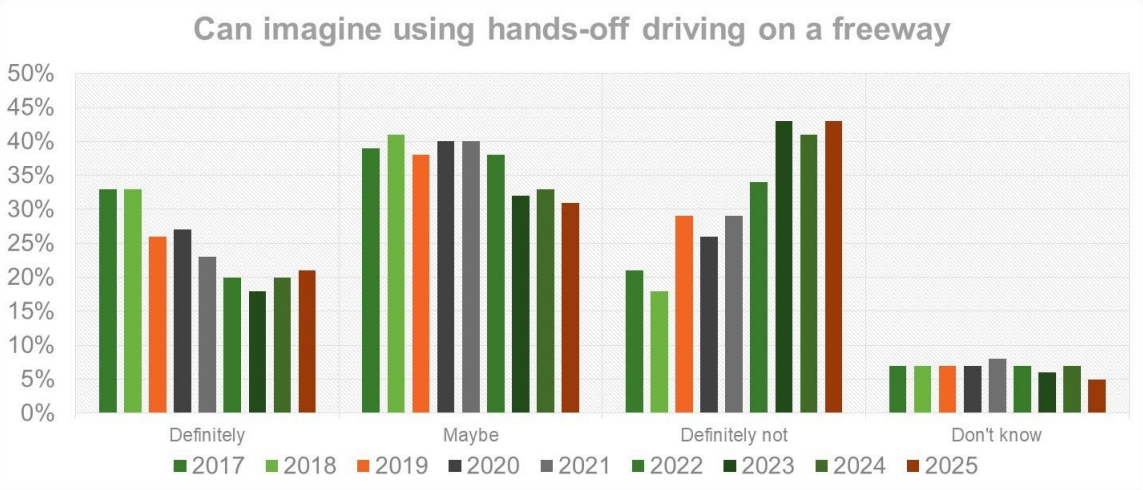
Road Readiness: There are questions about whether Australian roads and infrastructure are ready for self-driving vehicles, including signage, lane markings, and GPS coverage.

Interaction with Human Drivers: Respondents wonder how self-driving vehicles will integrate with human-driven cars, especially in mixed traffic and complex intersections.

8. General Interest and Scepticism

Polarized Views: While a minority express excitement and curiosity about the technology, most respondents are sceptical or uninterested, preferring to retain control over their vehicles.

Could you imagine using hands-off driving on a freeway?



- The proportion of motorists who say they could “definitely” imagine using hands-off driving on a freeway has continued to bounce up following years of decline.
- However, the proportion of motorists who say they could “definitely not” imagine it has returned to match its peak two years ago.
- 21% can now “definitely” imagine it, compared to 43% who can “definitely not” imagine it.
- However, despite this upward bounce in those who could “definitely” imagine using hands-off driving on a freeway, the most recent data remains well below the 2017 and 2018 surveys, when 33% could “definitely” imagine it.

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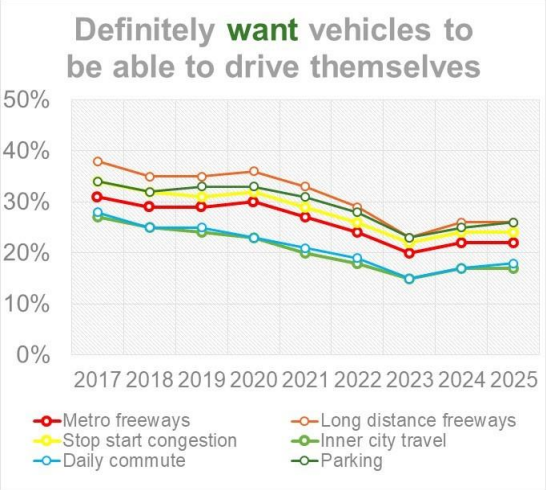
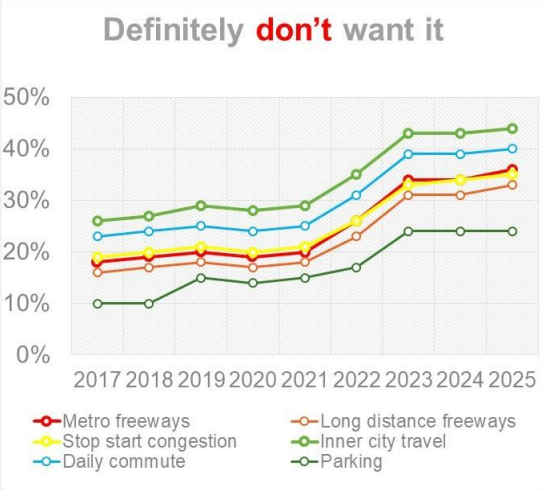
Do you want vehicles to be able to drive themselves in these types of journeys?

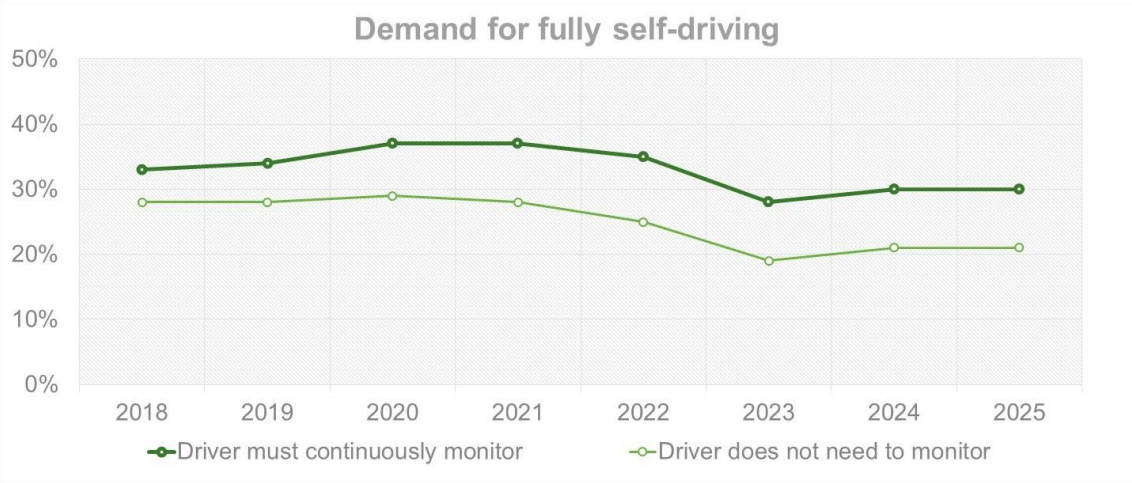




- The proportion of motorists who say they "definitely want" vehicles to be able drive themselves across a wide range of journey use cases has stabilised following last year's small bounce up, which was recorded after years of decline.
- However, despite this upward bounce and stabilisation, the most recent data remains well below 2017 data.

Would you want YOUR NEXT vehicle to offer fully self-driving on freeways, under each of these circumstances:

- **driver must continuously monitor the vehicle at ALL times?**
- **driver does not need to monitor but the vehicle may ask the driver to take back control?**



- The number of motorists who want their next vehicle to offer fully self-driving on freeways has stabilised following last year's small bounce up, which was recorded after several years of decline.

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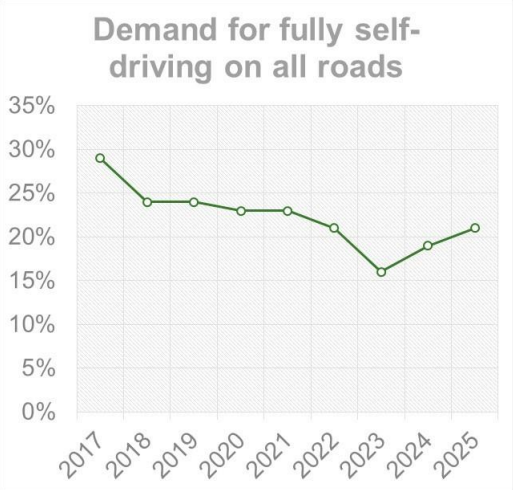
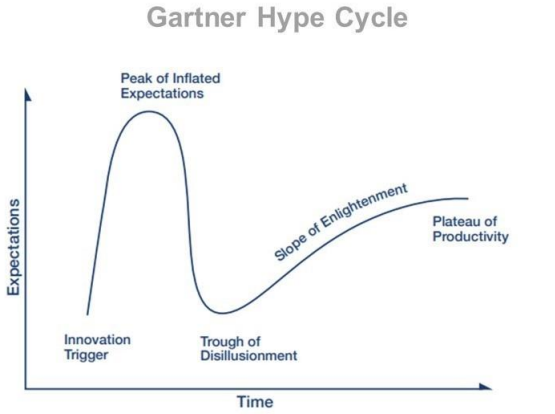
- This is the case for both of the following scenarios:
  - the driver must continuously monitor the vehicle at all times; and
  - the driver does not need to monitor and the vehicle is able to ask the driver to take back control.
- However, despite this upward bounce and stabilisation, the most recent data remains well below 2018-2022 data.

Would you want your NEXT vehicle to offer fully self-driving on all roads?





Source: Gartner Methodologies, Gartner Hype Cycle, https://www.gartner.com/en/research/methodologies/gartner-hype-cycle

- The proportion of motorists who want their next vehicle to offer fully self-driving on all roads has bounced upwards following years of decline.
- 21% of motorists now want it, compared to 19% last year and 16% two years ago.
- However this is still much lower than the 29% result from 2017.
- Together with the other results in the survey outlined above, do the small upward bounces of the last two years indicate that motorists' expectations are transitioning from Gartner's "*Trough of Disillusionment*" towards the "*Slope of Enlightenment"* when it comes to self-driving vehicles?
- Gartner explains parts of its Hype Cycle as follows:
  - ***Trough of Disillusionment:*** *Interest wanes as experiments and implementations fail to deliver. Producers of the technology shake out or fail. Investments continue only if the surviving providers improve their products to the satisfaction of early adopters.*
  - ***Slope of Enlightenment:*** *More instances of how the technology can benefit the enterprise start to crystallize and become more widely understood. Second- and third-generation products appear from technology providers. More enterprises fund pilots; conservative companies remain cautious.*
  - ***Plateau of Productivity:*** *Mainstream adoption starts to take off. Criteria for assessing provider viability are more clearly defined. The technology's broad market applicability and relevance are clearly paying off.*

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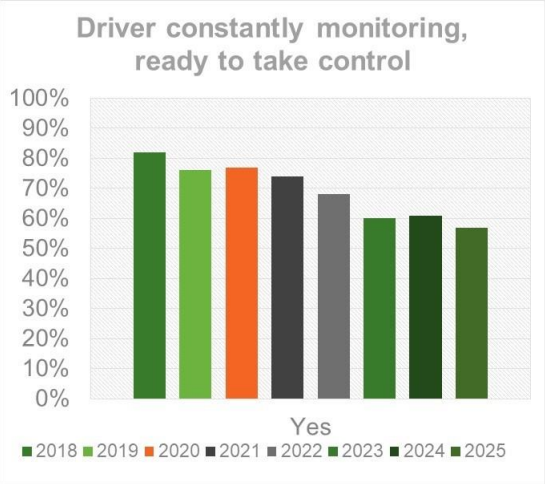
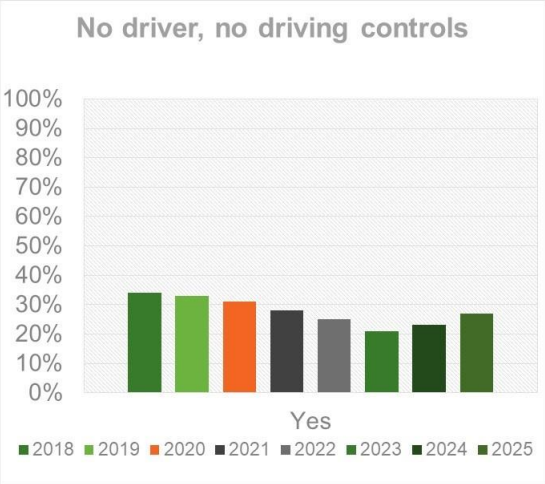
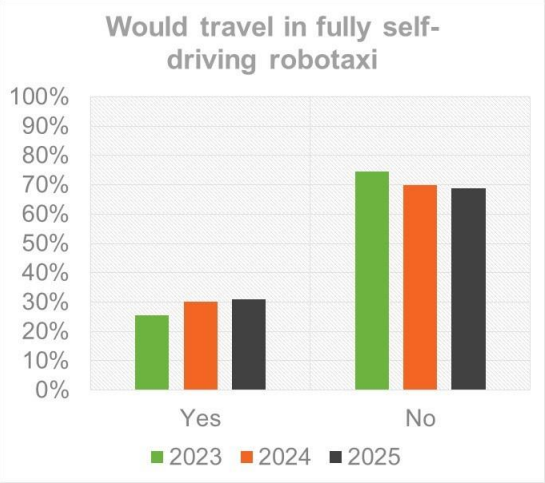
If you were given the opportunity to travel as a passenger in a fully self-driving car on a freeway among other traffic, would you do it?





- The number of motorists who would travel as a passenger in a fully self-driving car on a freeway where the vehicle has a driver who is monitoring and able to take over control, has continued its steady decline from 82% in 2018 to 57% in 2025.
- By contrast, the number of motorists who would travel as a passenger in a fully self-driving car on a freeway where the vehicle has no driver and no driving controls, has increased for the second successive year, from 21% in 2023 to 23% in 2024, and on to 27% in 2025.
- While the concept of a fully self-driving vehicle with no driver and no driving controls is starting to increase in acceptability, the rather 'unnatural' concept of a driver sitting idly at the controls waiting for an event that may not happen is perhaps destined to continue its decline until it has no value whatsoever.

Would you travel in a fully self-driving robotaxi?



- The number of people who would travel in a fully self-driving robotaxi has increased from 25% in 2023 to 30% in 2024, and on to 31% in 2025.

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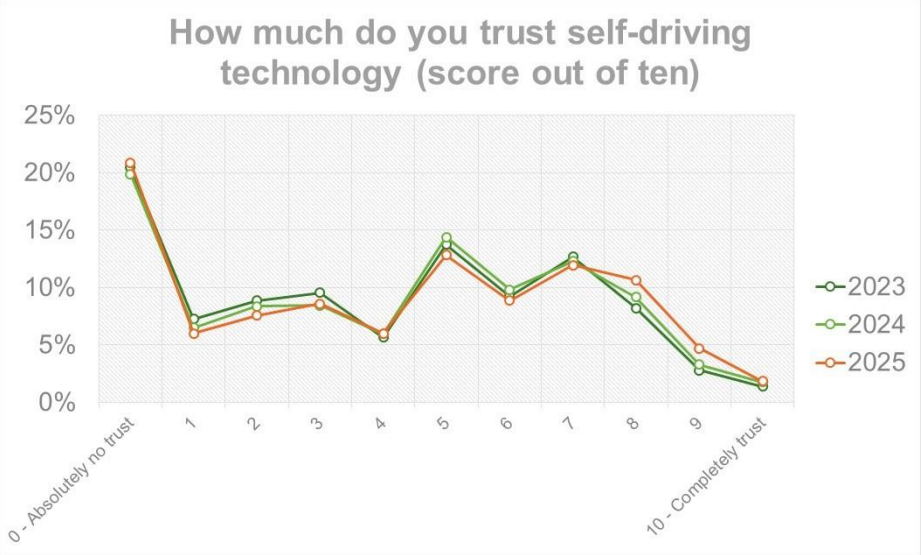
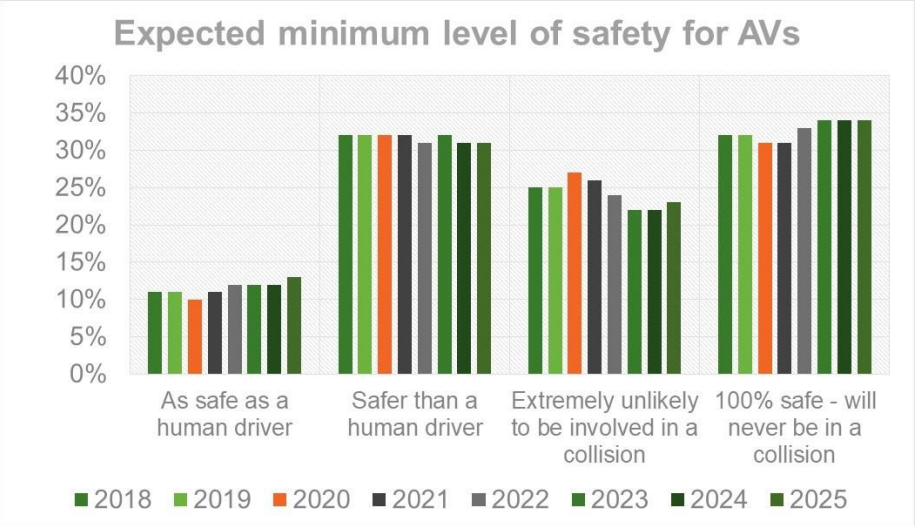
How much do you trust self-driving technology?



- Trust in self-driving technology is gradually increasing.
- The proportion of respondents who score their trust in self-driving technology most highly (scoring 8 to 10 out of ten) has increased from 12% in 2023 to 14% in 2024 and on to 17% in 2025.
- Meanwhile, the proportion of respondents who score their trust in self-driving technology the least (scoring 0 to 2 out of ten) has decreased from 37% in 2023 to 35% in 2024 and down to 34% in 2025.

What are your expectations of the MINIMUM level of safety that should be provided by fully self-driving vehicles?



- One in three motorists continue to have the probably unrealistic expectation that fully self-driving cars should be 100% safe and will never be involved in a collision.

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What concerns &/or excites respondents about the introduction of self-driving vehicles

Qualitative analysis of free text comments made by survey respondents:

CONCERNS

1. Safety and Reliability

Overwhelmingly, respondents are concerned about the safety of self-driving vehicles. Many cite fears about system malfunctions, software glitches, and the inability of technology to handle unpredictable or complex real-world situations (e.g., sudden obstacles, erratic human drivers, wildlife).

There is scepticism about whether current technology can match human intuition, judgment, and adaptability, especially in adverse weather or on poorly maintained roads.

Numerous references are made to accidents, “phantom braking,” and failures in existing semi-autonomous systems (notably Tesla’s camera-only approach).

2. Loss of Control and Trust

Many people express discomfort with relinquishing control to a machine, fearing being unable to intervene in emergencies or if the system fails.

There is a strong desire for manual override options and scepticism about trusting one’s life to a computer.

3. Legal, Ethical, and Accountability Issues

Respondents are concerned about who is responsible in the event of an accident: the manufacturer, the software developer, or the vehicle owner.

Ethical dilemmas, such as how a vehicle should prioritize lives in unavoidable crash scenarios (“trolley problem”), are frequently mentioned.

4. Cybersecurity and Privacy

The risk of hacking, data breaches, and remote takeover of vehicles is a significant worry.

Concerns about surveillance, data collection, and loss of privacy are also raised.

5. Infrastructure and Readiness

Many doubt that current road infrastructure, signage, and markings are adequate for self-driving technology, especially in Australia.

There is concern about the readiness of laws, insurance frameworks, and emergency response protocols.

6. Human Factors

Respondents worry that drivers will become complacent, lose driving skills, and be less able to respond in emergencies.

There is apprehension about mixing self-driving and human-driven vehicles on the road,

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with fears that human unpredictability will undermine safety.

7. Social and Economic Impacts

Job losses for professional drivers (taxi, truck, delivery) are a recurring concern.

Some fear increased inequality if the technology is only accessible to wealthier individuals.

EXCITEMENT

1. Potential for Increased Safety

Some respondents are optimistic that, once mature, self-driving vehicles could dramatically reduce accidents caused by human error, fatigue, distraction, or impairment.

2. Greater Accessibility and Independence

There is excitement about the potential for elderly, disabled, or otherwise non-driving individuals to gain or retain mobility and independence.

3. Reduced Stress and Increased Productivity

The prospect of relaxing, working, reading, or sleeping during commutes is appealing to many.

Some look forward to less stressful long-distance travel and the elimination of parking hassles.

4. Environmental and Urban Benefits

Hopes are expressed for cleaner, electrified fleets, reduced congestion, and more efficient use of vehicles (e.g., robotaxis, car sharing).

AMBIVALENCE & CALLS FOR CAUTION

Many respondents are undecided or express a “wait and see” attitude, wanting more real-world testing, transparency, and evidence of safety before accepting the technology.

There is a strong call for rigorous, independent testing and government regulation, rather than reliance on manufacturer claims or “beta testing” on public roads.

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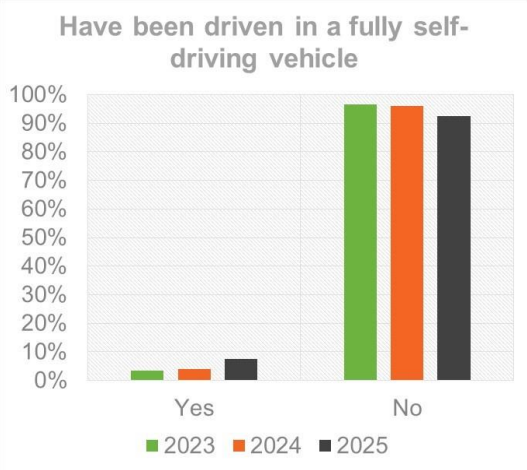
Have you been driven in a fully self-driving vehicle? If yes, where?



If yes, where?

54% in a Tesla operating with Full Self-Driving (Supervised)

22% in an overseas robotaxi

11% in an Australian trial

13% other (including train, bus, mining truck, monorail)

- The proportion of respondents who have been driven in a fully self-driving vehicle has increased from 3.5% in 2023 to 4.0% in 2024, and on to 7.4% in 2025.
- Half of this real-world experience is attributed to Tesla's Full Self-Driving (Supervised) function.

What respondents thought about their experience of being driven in a fully self-driving vehicle

Qualitative analysis of free text comments made by survey respondents:

1. Range of Emotional Responses

Positive Reactions: Many respondents described their experiences as "amazing," "fantastic," "exciting," "fun," "relaxing," and "safe." Some felt the technology was "impressive," "brilliant," or "the future of transportation." Several mentioned they would like to own a self-driving vehicle or already use the technology regularly.

Negative Reactions: Others reported feeling "scared," "nervous," "uncomfortable," "unsafe," or "anxious." Some described the experience as "unnerving," "strange," or "horrible," and a few said they would not want to use self-driving vehicles again.

2. Trust and Adaptation

Building Trust: A common theme was initial hesitation or discomfort, which for some gave way to trust as the ride progressed and the technology demonstrated its capabilities. Several noted that repeated exposure increased their comfort level.

Persistent Doubts: However, some respondents never fully relaxed or trusted the vehicle, citing concerns about unpredictable situations, the need for human supervision, or specific incidents where the technology made mistakes.

3. Perceived Safety and Performance

Safety Perceptions: Many felt safer than with human drivers, especially appreciating the vehicle's consistency, adherence to rules, and ability to detect hazards. Others felt

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EastLink Time better spent.

less safe, particularly in complex urban environments or when the system made errors (e.g., misreading signs, abrupt stops, or failing to predict human behaviour).

Performance Feedback: Respondents praised smooth rides, hazard detection, and stress reduction, especially on highways. Criticisms included overly cautious behaviour, slow speeds, difficulty merging, and struggles with certain road conditions or signage.

4. Technology and Features

Impressive Technology: Respondents were often impressed by the vehicle's ability to make real-time decisions, maintain lane discipline, and provide a glimpse into the future of mobility.

Areas for Improvement: Suggestions included better handling of urban roads, improved speed sign recognition, more assertive driving in traffic, and the addition of sensors like lidar for enhanced safety.

5. Impact on Travel Experience

Convenience and Comfort: Many found the experience convenient, less tiring, and enjoyable, especially for longer trips. Some appreciated the novelty and the ability to relax or focus on other things.

Concerns and Limitations: Others felt disengaged, bored, or overly alert due to the need to supervise the system. Some noted that the technology is not yet ready for all conditions, particularly in Australia or on complex roads.

6. Societal and Personal Implications

Accessibility and Independence: Several respondents highlighted the potential for self-driving vehicles to improve accessibility for people who cannot drive, restore independence, and enhance road safety.

Scepticism and Resistance: A minority expressed strong scepticism, citing negative experiences, safety incidents, or a preference for human control.

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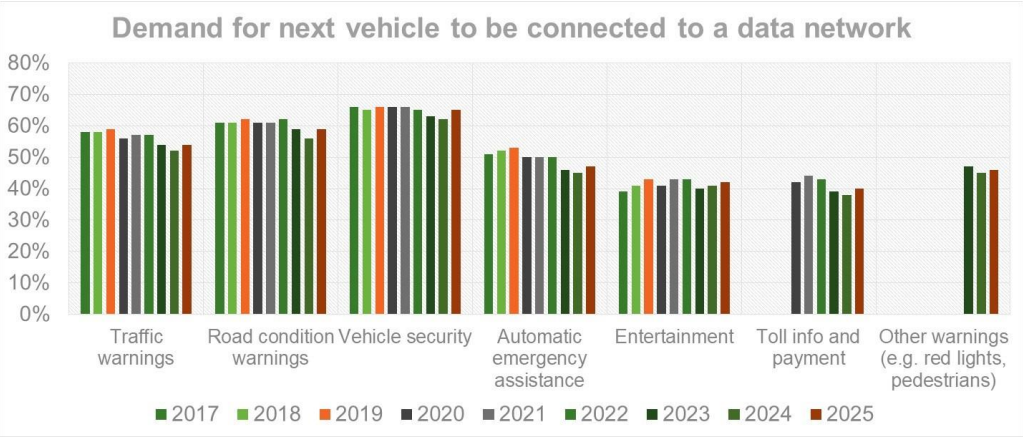
Connected cars

Do you want your NEXT vehicle to be connected to a data network for the following reasons?



- There has been a small up-tick in demand for vehicle connectivity following a few years of decline.
- A majority of motorists continue to “definitely want” their next car to be connected to a data network for traffic warnings, road condition warnings and vehicle security applications.
- 47% motorists “definitely want” their next car to be connected to a data network for automatic emergency assistance.
- 46% of motorists “definitely” want their next car to be connected to a data network for other warnings (e.g. red lights, pedestrians).
- Four in ten motorists “definitely want” their next car to be connected to a data network for entertainment as well as toll information and toll payment.

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