

30 March 2023 – FOR IMMEDIATE RELEASE

## **EASTLINK'S ANNUAL VICTORIAN SELF-DRIVING & ELECTRIC CAR SURVEY: LATEST RESULTS**

In late 2022, EastLink conducted its sixth Annual Victorian Self-Driving & Electric Car Survey. More than 11,000 motorists who use Melbourne's EastLink participated in the latest survey, confirming the EastLink tracking survey as the largest of its kind in the world.

The survey shows that hybrid is currently the most preferred power option (across all motorists) and will continue to be the most preferred for the next few years, while 100% electric becomes the most preferred beyond 5 years.

However, purchase cost continues to be by far the largest barrier to owning a 100% electric vehicle, with an increasing proportion of motorists citing this as a barrier from year to year. This is despite the apparently declining price of 100% electric vehicles.

More than two thirds of motorists think that governments should provide incentives to encourage the take-up of electric vehicles.

The survey indicates that while usage of most of the latest driver assist functions is increasing strongly, there are some functions – in particular active parking assistance and automatic lane changing – that are much less popular and not increasing in popularity.

The question now arises, is the reported increase in the usage of most driver assist functions resulting in improvements to road safety statistics such as the number of vehicle collisions and the severity of collision outcomes? And to what extent have previously anticipated road safety improvements been achieved? Further research is needed at a state and national level.

In terms of fully self-driving cars, the results suggest that there is still a significant and increasing amount of scepticism and uncertainty among motorists about the safety and feasibility of these vehicles. For example, there has been a significant decline in the number of motorists who would use hands-off driving on a freeway. The proportion of motorists who would travel as a passenger in a fully self-driving car has steadily declined from year to year. And one in three motorists have the probably unrealistic expectation that fully self-driving cars should be 100% safe and will never be involved in a collision.

This indicates that fully self-driving cars may not be widely adopted, at least until trust in the technology improves.

On the other hand, the results regarding vehicle connectivity suggest that there is strong latent demand for cars that are connected to data networks for various applications such as traffic warnings, road condition warnings, vehicle security, automatic emergency assistance, and

For further information:

DOUG SPENCER-ROY  
Corporate Affairs & Marketing Manager  
ConnectEast Group  
T 03 9955 1700  
M 0439 940 530  
dsroy@connecteast.com.au



entertainment. This suggests that future cars are likely to be increasingly connected and equipped with various features that can enhance safety, convenience, and entertainment for drivers and passengers.

In summary, the EastLink survey indicates that hybrid power will continue to be a more preferred power option than 100% electric over the next few years, with 100% electric becoming more preferred in the longer term. Motorists are rapidly adopting most of the latest driver assist functions. Motorists want future cars to be more connected and equipped with a range of new features and capabilities. However, fully self-driving across a range of formats and driving scenarios will take longer to gain widespread acceptance and adoption.

EastLink is proud to be a founding member of CCAT. As the findings show, there is still much to be done to bring the public along for the journey when it comes to self-driving technologies in particular, and we support CCAT's work as a public champion in this space.

*The detailed survey results are attached (see overleaf).*

---

**For further information:**

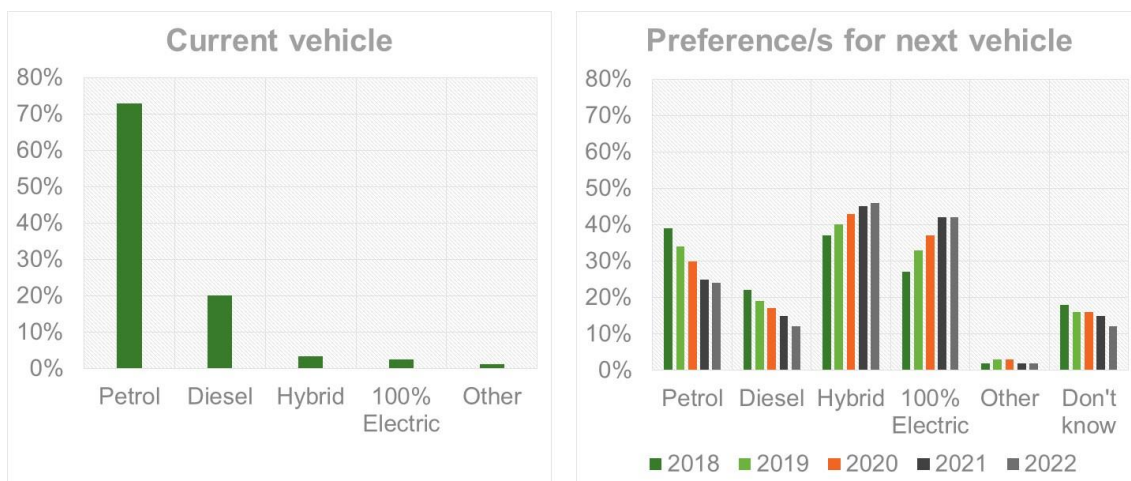
DOUG SPENCER-ROY  
Corporate Affairs & Marketing  
Manager  
ConnectEast Group  
T 03 9955 1700  
M 0439 940 530  
dsroy@connecteast.com.au



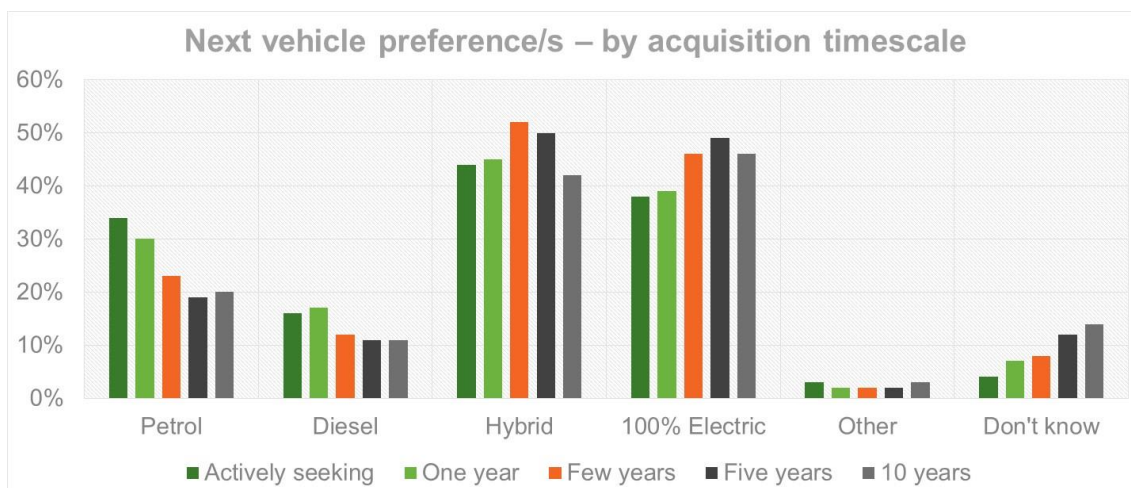
## DETAILED SURVEY RESULTS

### Vehicle power

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



- 46% of motorists now include hybrid and 42% of motorists now include 100% electric in their power preferences for their next vehicle.
- Whereas, just 24% of motorists now include petrol and 12% of motorists now include diesel in their power preferences.
- While hybrid continues to grow as a preference, 100% electric is unchanged compared to the previous year and has stopped ‘catching up’ on hybrid as a preference (at least for now).



- Hybrid is the most popular power preference for motorists who expect to get their next vehicle within the next few years.

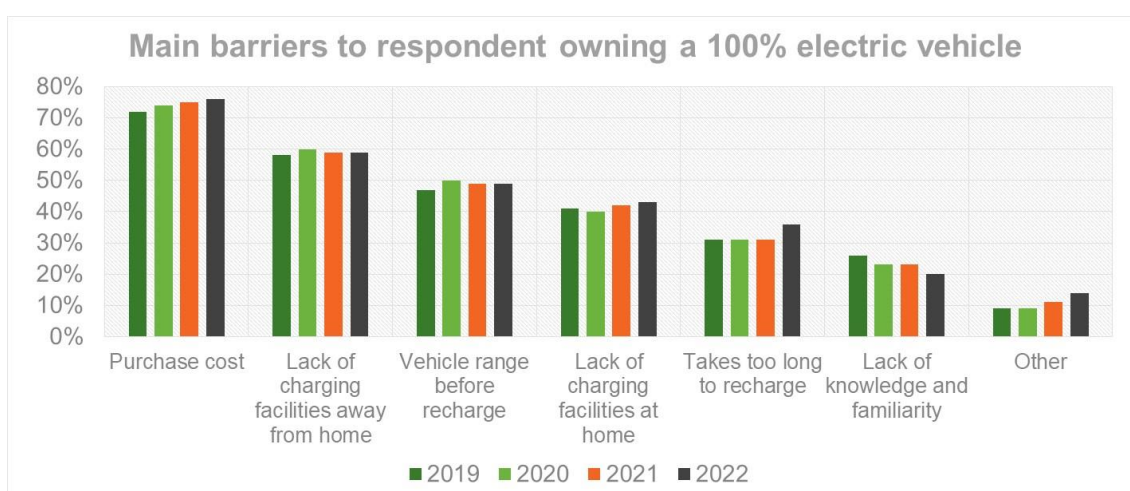
For further information:

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au



- However, 100% electric becomes the most popular power preference for motorists who expect to get their next vehicle beyond 5 years.
- For the first time in this annual survey, the preference for petrol is higher for those who expect to get their next vehicle in 10 years' time compared to 5 years' time. Whereas in previous surveys, the preference for petrol was lower for those who expect to get their next vehicle in 10 years' time compared to 5 years' time. This increased preference for petrol is at the expense of the preference for 100% electric for this group of motorists. Will this be seen again in future surveys?

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



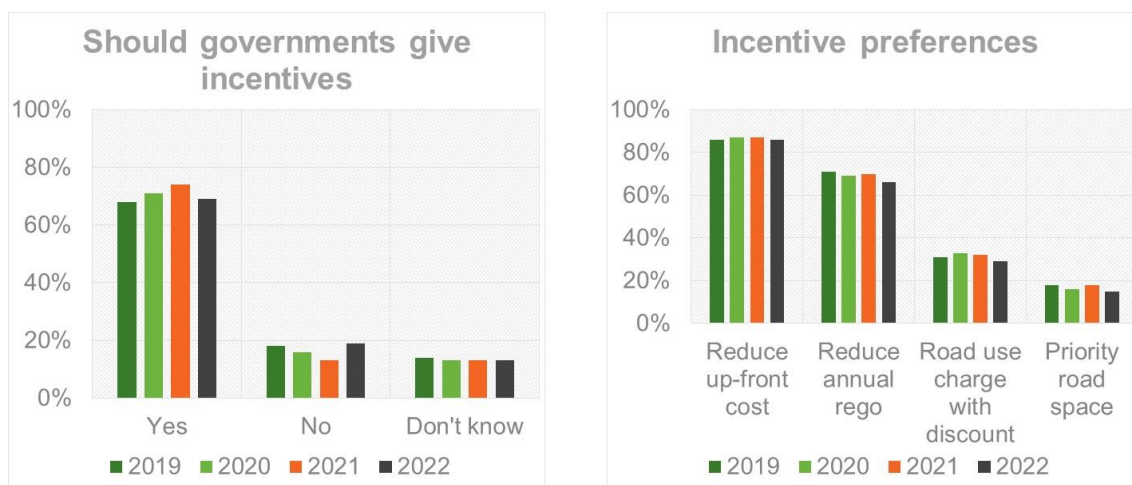
- The main barriers to owning a 100% electric vehicle are: purchase cost (76%), followed by the lack of charging facilities away from home (59%), and then vehicle range before re-charging (49%).
- Purchase cost is increasingly cited as a barrier, growing steadily from 72% of motorists in 2019 to 76% of motorists in 2022.
- Logic suggests that purchase cost really needs to be a barrier that is perceived to be declining from year to year, not increasing.

**For further information:**

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au

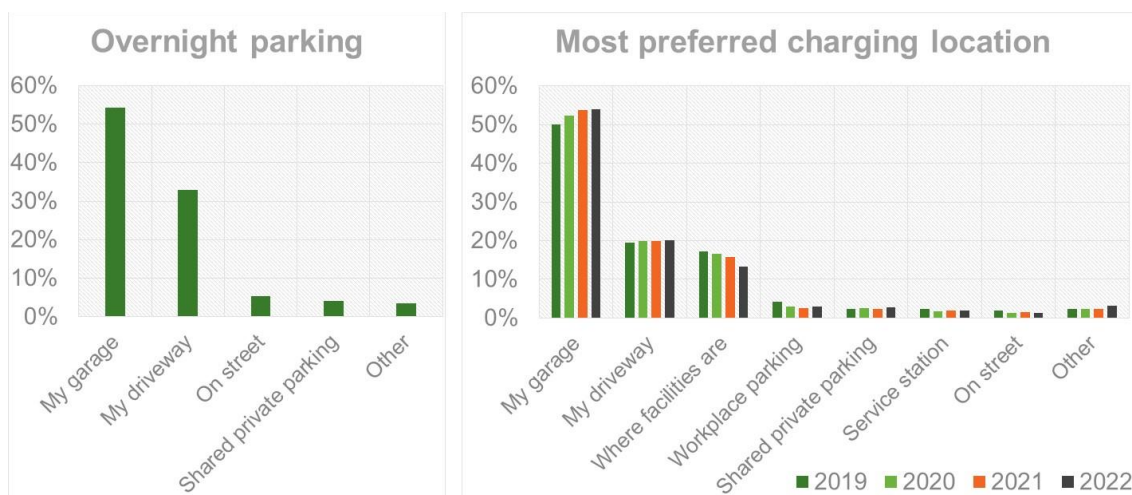


**Do you think governments should give incentives to drive a faster uptake of electric vehicles in Australia? If yes, what type of incentives should governments provide?**



- 69% of motorists think that governments should provide incentives to encourage the take-up of electric vehicles (although this is less than the previous year's 74%, reversing the previous trend of increasing support for government incentives from year to year).
- Most motorists want government incentives that will reduce the up-front purchase price as well as reduce the cost of annual registration for electric vehicles.

**At home currently, where do you mostly park your car overnight when not in use? If you owned a 100% battery electric vehicle where would you most prefer to charge it?**



- 87% of motorists said they park their car overnight in their private garage or on their private driveway.
- 74% of motorists identified these two locations as their most preferred charging locations.

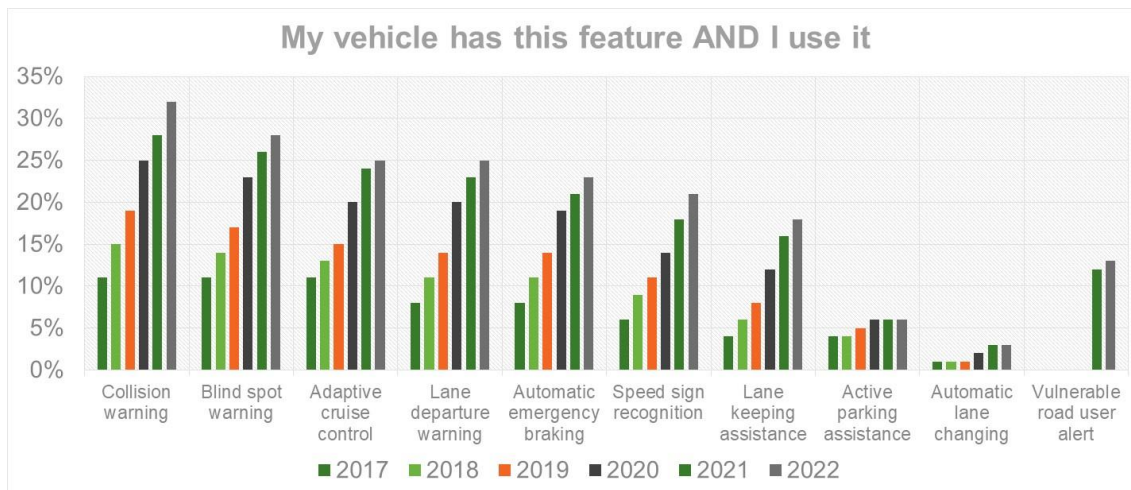
For further information:

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au

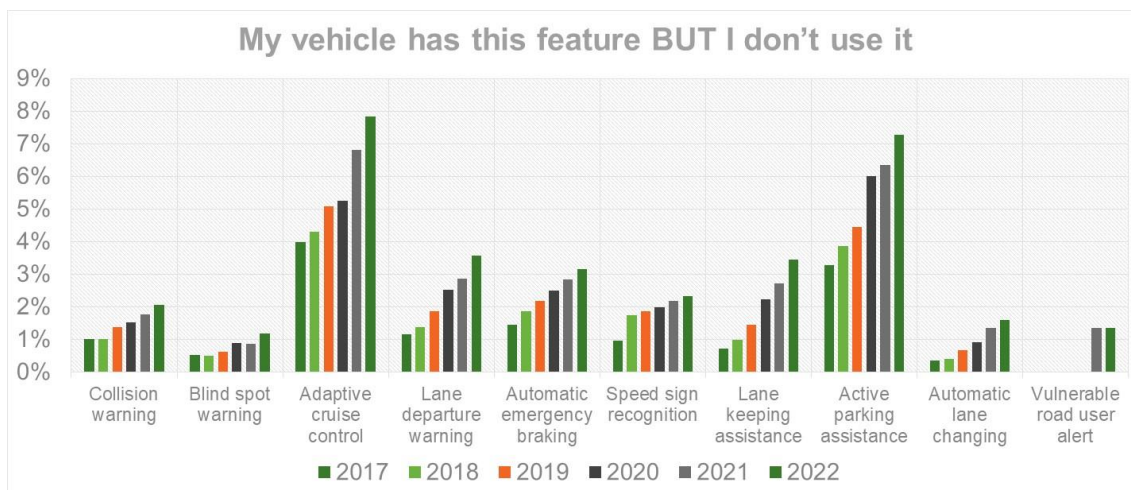


### Driver assist functions

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 not increasing.



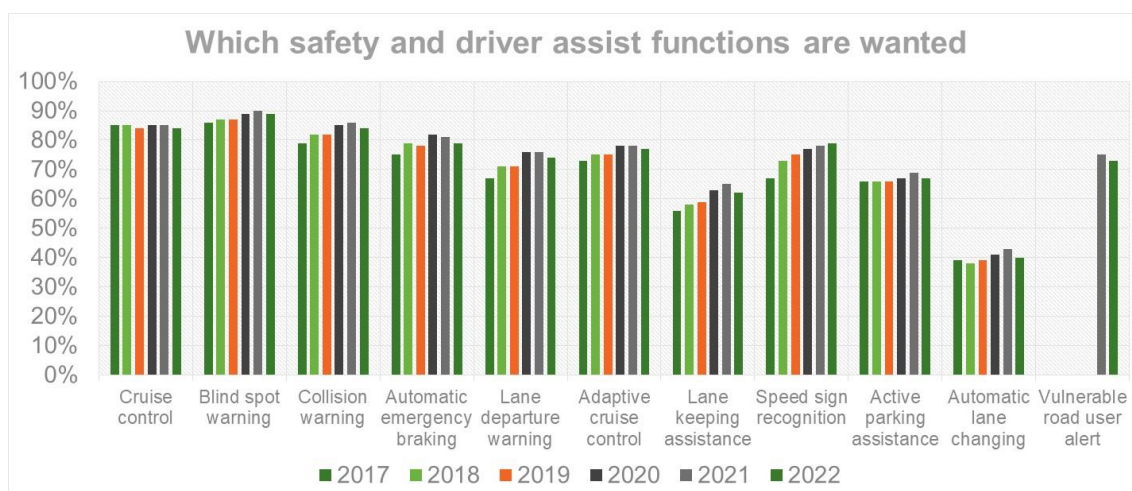
- Compared with other driver assist functions, adaptive cruise control and active parking assist are less likely to be used by motorists when these functions are available.

For further information:

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au



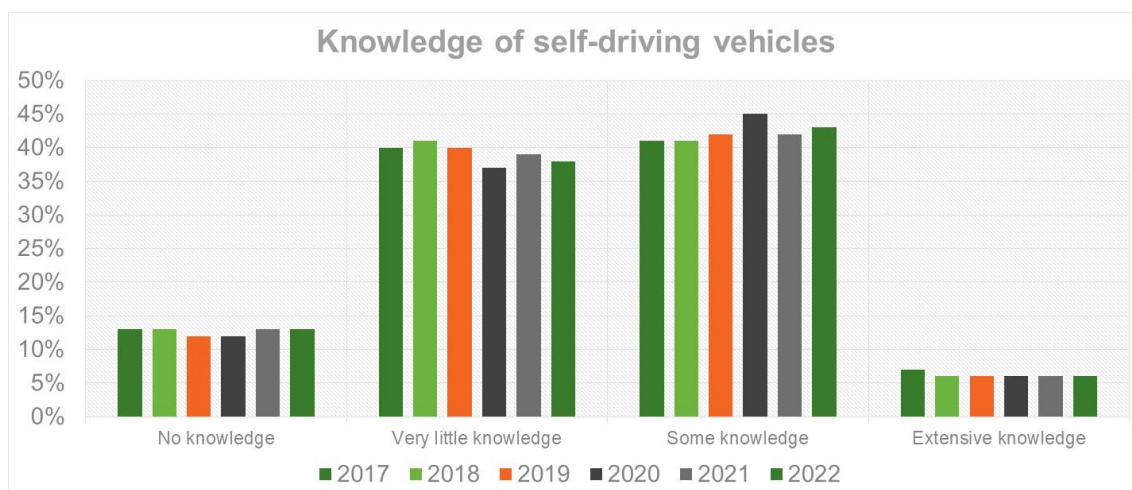
## Which of the following automated functions would you want in your NEXT vehicle?



- Desirability of most driver assist functions declined slightly in 2022 compared to 2021.
- Speed sign recognition stands out as the only driver assist function that motorists have said they increasingly want each year since 2017.

## Fully self-driving cars

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



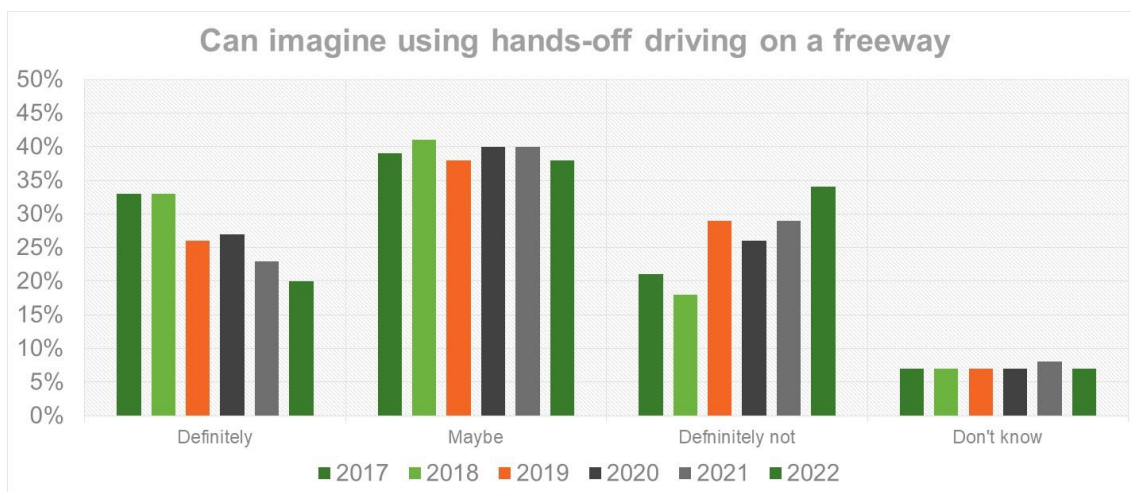
- Since 2017, there has been very little change in motorists' perceptions of their knowledge of self-driving cars, other than a small shift (just 2% of motorists) from "very little knowledge" to "some knowledge".
- Half of all motorists continue to think they have "no knowledge" or "very little knowledge" of self-driving vehicles.

For further information:

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au

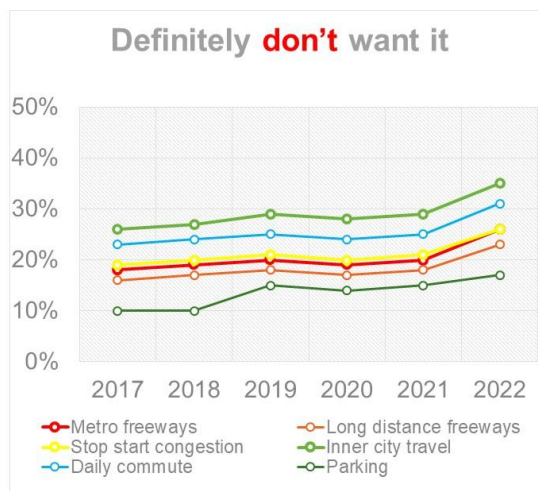
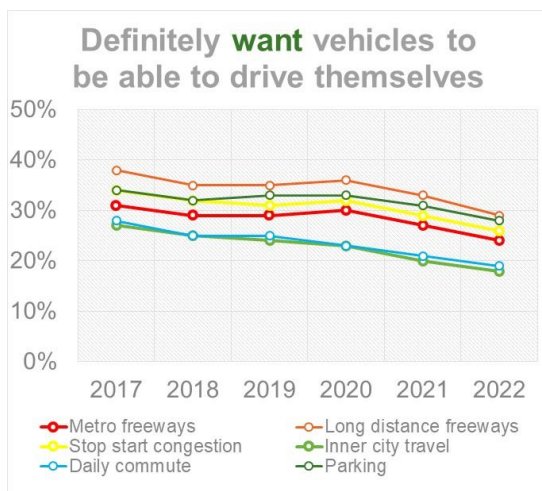


## Could you imagine using hands-off driving on a freeway?



- Since 2017 there has been a significant decline in the number of motorists who say they could “definitely” imagine using hands-off driving on a freeway.
- This has been matched by a corresponding increase in the number of motorists who say they could “definitely not” imagine it.

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

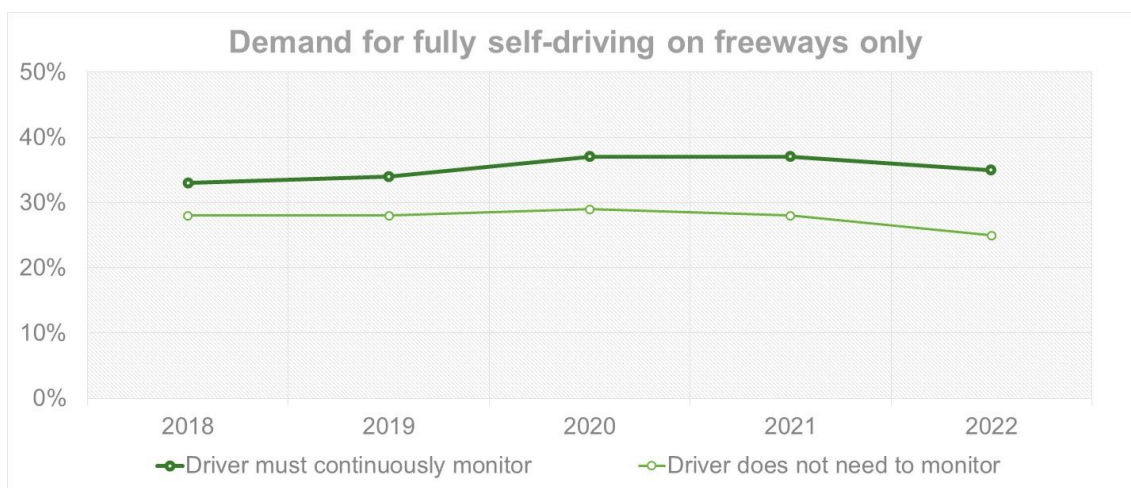


- Since 2017 there has been a significant decline in the number of motorists who say they “definitely want” vehicles to be able to drive themselves across a wide range of journey types.
- This has been matched by a corresponding increase in the number of motorists who say they “definitely don't want” it.



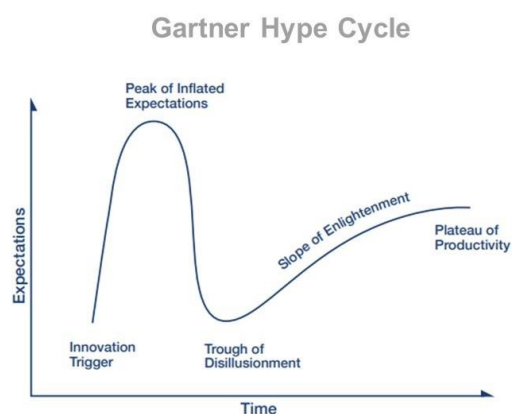
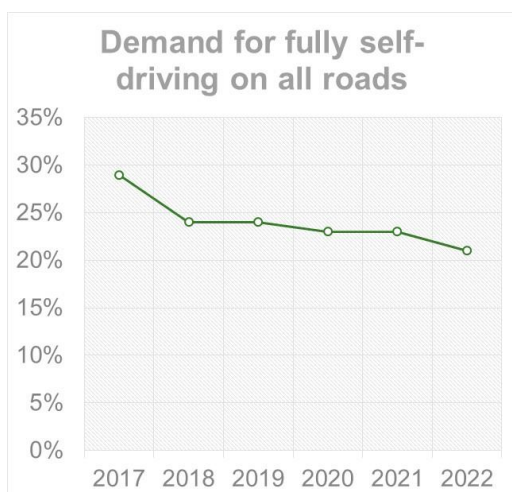
Would you want YOUR NEXT vehicle to offer fully self-driving on freeways, under each of these circumstances:

- 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 declined slightly following a peak in 2020.
- 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.

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>

- Compared to earlier years – especially the peak in 2017 – motorists are less likely to want their next vehicle to offer fully self-driving on all roads.
- This, together with the other results in the survey outlined above, indicates that motorists'

For further information:

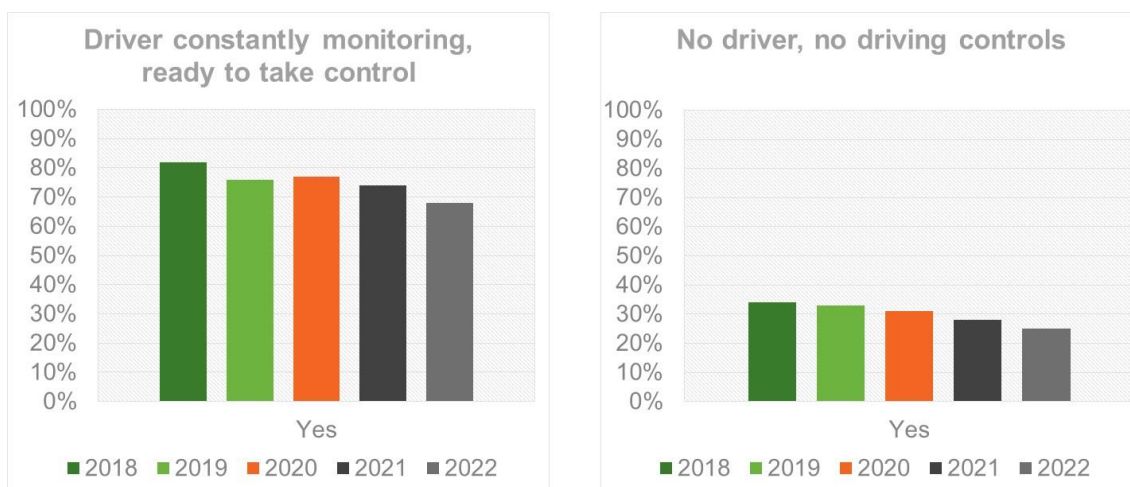
DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au



expectations remain in Gartner’s “trough of disillusionment” when it comes to fully self-driving on all roads.

- Gartner has explained its Hype Cycle “trough of disillusionment” as follows:  
*Impatience for results begins to replace the original excitement about potential value. Problems with performance, slower-than-expected adoption or a failure to deliver financial returns in the time anticipated all lead to missed expectations, and disillusionment sets in.*

**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?**



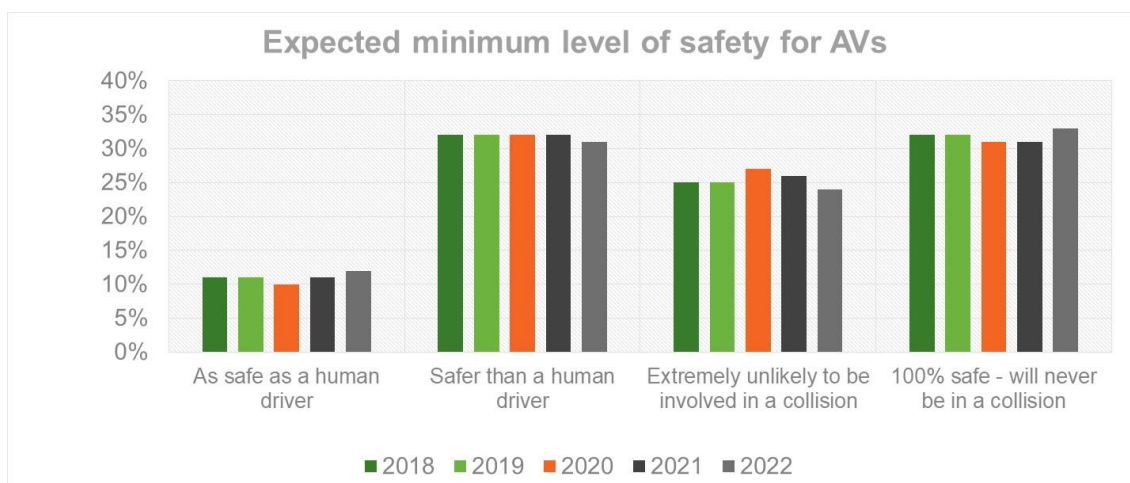
- There has been an on-going decline in the number of motorists who would travel as a passenger in a fully self-driving car on a freeway where the vehicle has a driver who is monitoring and able to take over control.
- There has also been an on-going decline in the number of motorists who would travel as a passenger in a fully self-driving car on a freeway where the vehicle has no driver and no driving controls.
- While 68% would now travel in a fully self-driving car on a freeway where the vehicle has a driver who is monitoring and able to take over control, this falls to just 25% where the vehicle has no driver and no driving controls.

For further information:

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au



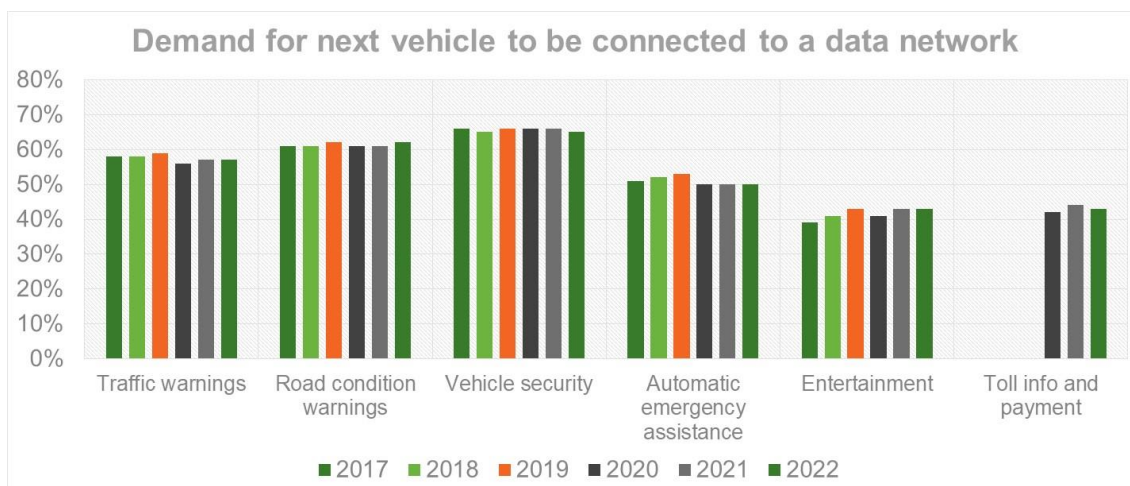
## What are your expectations of the MINIMUM level of safety that should be provided by fully self-driving vehicles?



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

## Connected cars

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



- A clear 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.
- Half of motorists still “definitely want” their next car to be connected to a data network for automatic emergency assistance.
- 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.
- There is a latent demand for future applications enabled through vehicle connectivity.

**For further information:**

DOUG SPENCER-ROY  
 Corporate Affairs & Marketing  
 Manager  
 ConnectEast Group  
 T 03 9955 1700  
 M 0439 940 530  
 dsroy@connecteast.com.au

