

7 February 2020 – FOR IMMEDIATE RELEASE

EASTLINK SELF-DRIVING & ELECTRIC CAR SURVEY: MOTORISTS NOW PREFER HYBRID OVER TRADITIONAL PETROL ENGINES

For the first time in EastLink’s Annual Victorian Self-Driving & Electric Car Survey, motorists prefer hybrid power for their next car over a traditional petrol engine.

While the EastLink survey shows that use of the latest driver assistance functions is growing each year, some motorists are disillusioned with fully self-driving cars.

Most motorists “definitely want” a connected car for traffic warnings, road condition warnings and vehicle security features.

However, the EastLink survey also indicates that most motorists remain unconvinced by road use charging.

Key survey findings:

- For the first time, more motorists would prefer hybrid power for their next car over a traditional petrol combustion engine.
- The preference for 100% fully electric power is not far behind, also growing strongly.
- 68% of motorists think that Governments should provide incentives to encourage the take-up of electric vehicles.
- More and more motorists are using the latest driver assistance functions each year.
- However, some motorists are disillusioned with the concept of fully self-driving cars.
- Six out of ten motorists want a connected car for traffic warnings, road condition warnings and vehicle security features
- Meanwhile, 63% of motorists continue to be unconvinced by road use charging.

About the survey

EastLink corporate affairs and marketing manager Doug Spencer-Roy said, “More than 22,000 Victorian motorists fully completed the latest survey in late 2019, which is a 22% increase on the previous year.”

“The EastLink survey is the world’s largest annual tracking study of motorists’ attitudes to self-driving and driver assistance technologies, vehicle connectivity, vehicle electrification and road use charging – technologies which are expected to converge in cars of the future,” he added.

For further information:

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



Hybrid and fully electric cars

For the first time in EastLink's annual survey, more Victorian motorists prefer hybrid power than a traditional petrol combustion engine for their next car.

The desirability of 100% fully electric power is not far behind hybrid, and is also growing strongly.

The EastLink survey indicates that motorists think the biggest barrier to owning a 100% fully electric vehicle is purchase cost (72%), followed by the lack of charging facilities away from home (58%), and then vehicle range before re-charging (47%).

To address the cost barrier, 68% of motorists think that Governments should provide incentives to encourage the take-up of electric vehicles.

Doug Spencer-Roy noted, "In particular, motorists told us they want Government incentives that will reduce the up-front purchase price as well as reduce the cost of annual registration for electric vehicles."

Charging facilities at home are seen as a less significant barrier. Most motorists said they park their car overnight in their private garage or on their private driveway, leading to two thirds of motorists having these as their preferred charging locations.

The latest driver assistance functions

The EastLink survey demonstrates that more and more Victorian motorists are using the latest driver assistance functions each year.

Doug Spencer-Roy said, "Functions like collision warning, lane departure warning, adaptive cruise control, lane keeping assistance and automatic emergency braking are expected to deliver significant road safety benefits long before fully self-driving cars become commonplace."

"This is because the latest driver assistance functions will reduce the likelihood of collisions, as well as reduce the severity of collisions."

The EastLink survey indicates that female motorists increasingly want the latest driver assistance functions in their next car, which is closing the gap in demand for these functions compared to male motorists.

"These survey results support EastLink's expectation that use of the latest driver assistance functions will become commonplace long before we see lots of fully autonomous vehicles on our roads," said Doug Spencer-Roy.

For further information:

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



Fully self-driving cars

However, a number of results in the EastLink survey indicate that some Victorian motorists are disillusioned with fully self-driving cars.

For example, there has been a sizeable decrease in the proportion of motorists who could imagine using hands-off driving on a freeway.

Demand for fully self-driving on all roads remains significantly lower than it was two years ago.

And there has also been a decrease in the proportion of motorists who would take a ride in a fully self-driving vehicle, even when there is a driver in the vehicle constantly monitoring and ready to take control.

Connected cars

Connected cars are expected to become widely available in Australia over the next few years.

The EastLink survey shows that a majority of Victorian motorists continue to “definitely want” their next car to be connected to a data network for traffic warnings, road condition warnings and vehicle security features.

Doug Spencer-Roy commented, “Freeway operators – public and private – across Australia should come together to plan infrastructure-to-vehicle communications in a more co-ordinated and consistent way. Otherwise we risk having various roads communicating with vehicles and motorists in different ways, which could cause some confusion among motorists.”

Road use charging

The popularity of road use charging is unchanged compared to the previous year’s survey.

With more and more vehicles expected to be hybrid powered or 100% fully electric in the coming years, government fuel excise (tax) revenue is expected to reduce.

Road use charging – which would apply to all vehicles irrespective of power type – has been put forward as a solution to this tax revenue gap, as well as a means of more fairly charging motorists according to their actual road use and their individual impact on the road network.

“However, despite efforts by a range of organisations to promote road use charging, 63% of Victorian motorists continue to be unconvinced, which is unchanged compared to the previous year,” said Doug Spencer-Roy.

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

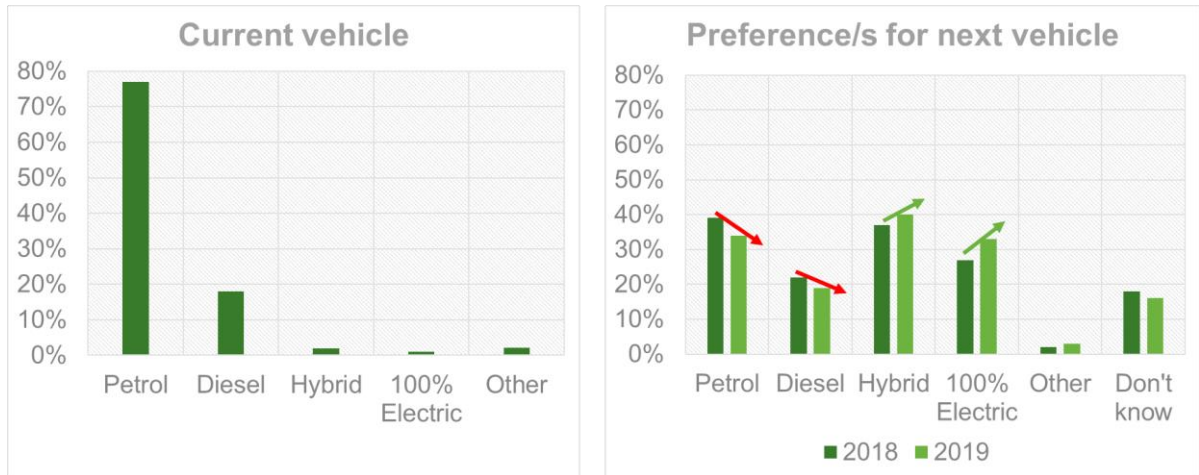


DETAILED SURVEY RESULTS

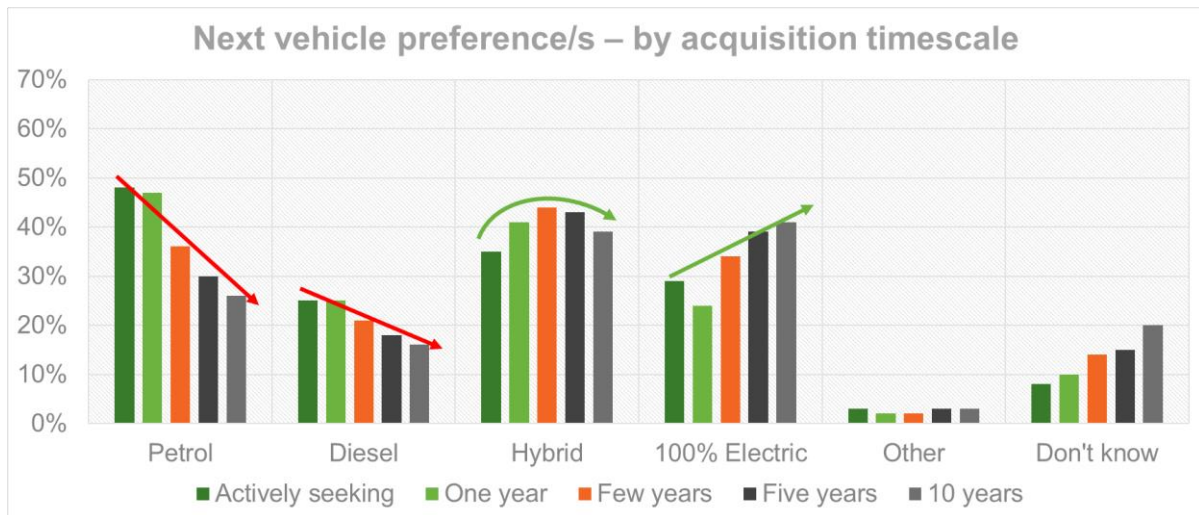
Vehicle power

How is your current vehicle powered?

What power preference/s do you have for your NEXT vehicle?



- Motorists’ preference for hybrid power in their next vehicle now exceeds their preference for a traditional petrol combustion engine.
- In addition, motorists’ preference for 100% fully electric power in their next vehicle is not far behind and is growing quickly.



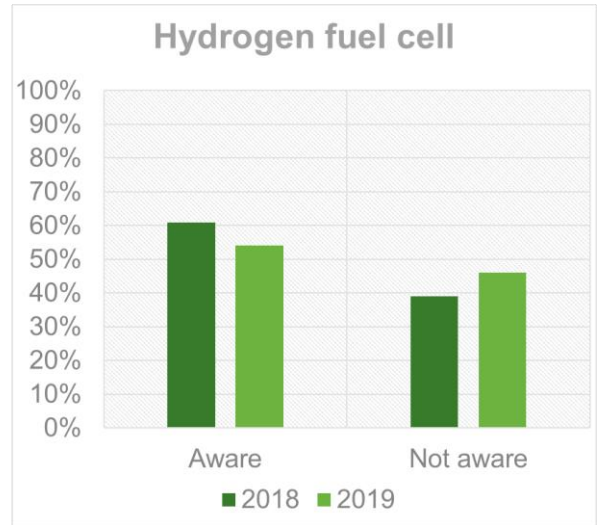
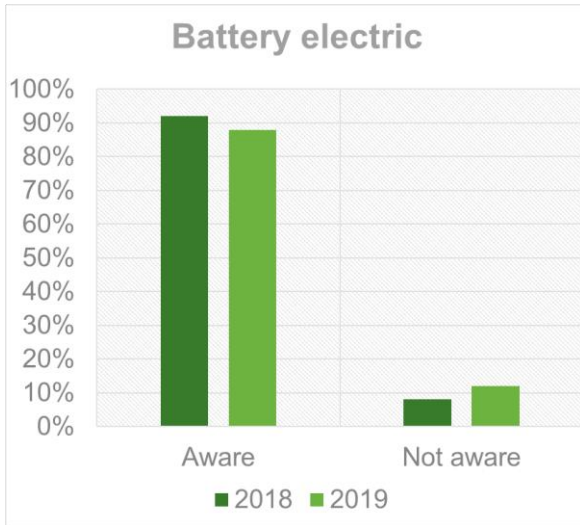
- The further into the future the motorist expects to get their next vehicle, the less likely they prefer traditional petrol or diesel combustion engines as an option.
- The further into the future the motorist expects to get their next vehicle, the more likely they prefer 100% electric as an option.

For further information:

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

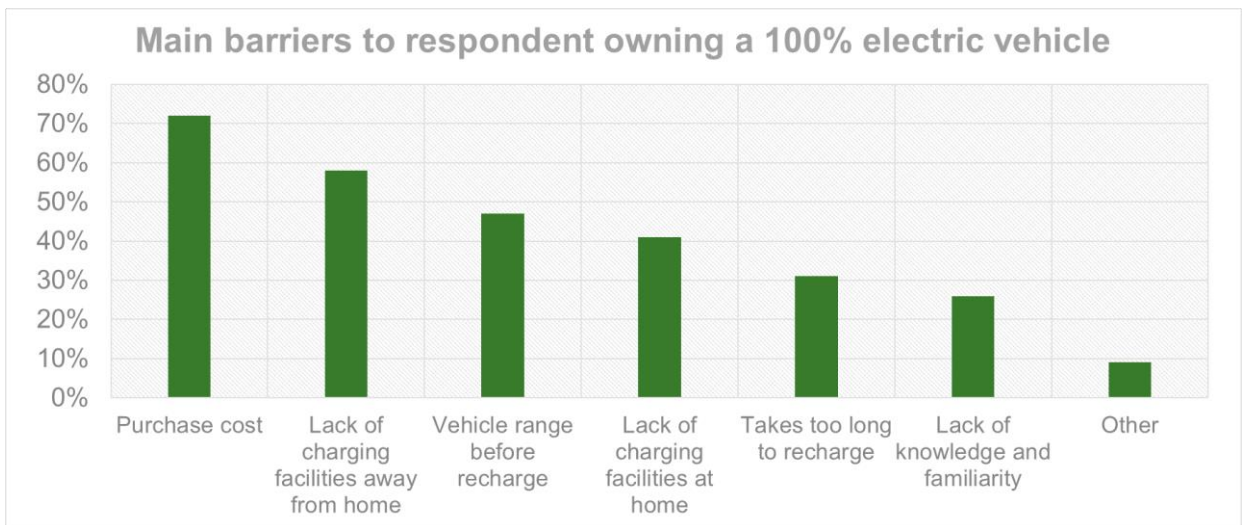


Are you aware of these types of fully electric vehicle?



- Motorists report that awareness of battery electric and hydrogen fuel cell technologies has decreased slightly (even although motorists are now more likely to prefer 100% fully electric power for their next vehicle).

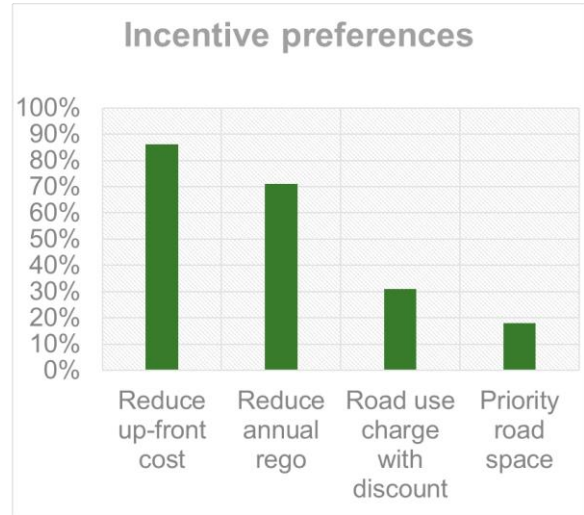
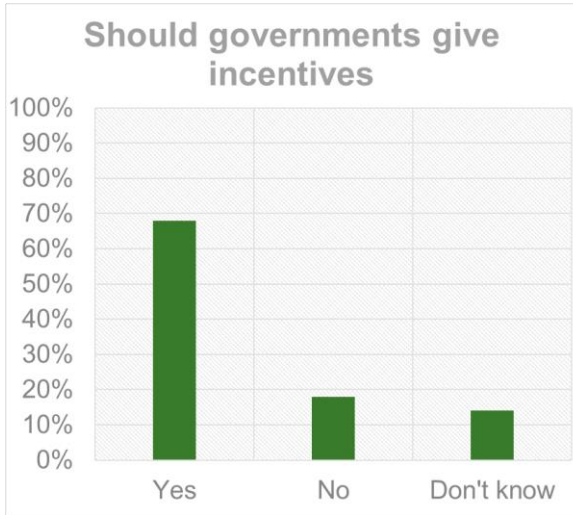
What do you see as the main barriers to you owning a 100% electric vehicle?



- The biggest barrier to owning a 100% fully electric vehicle is purchase cost (72%), followed by the lack of charging facilities away from home (58%), and then vehicle range before re-charging (47%).

Do you think governments should give incentives to drive a faster uptake of electric vehicles in Australia?

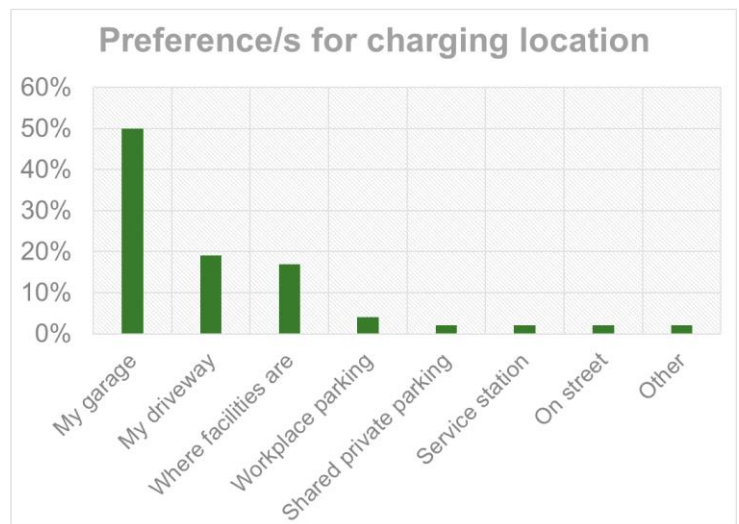
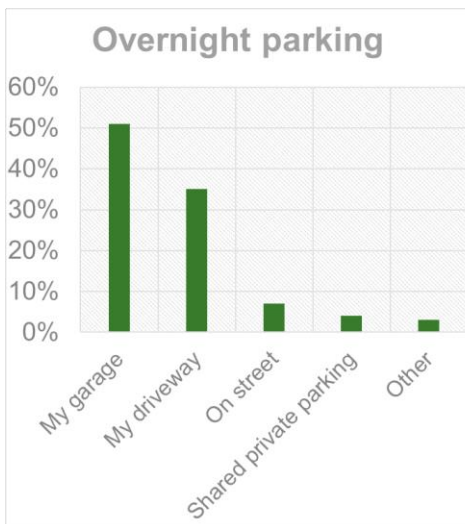
If yes, what type of incentives should governments provide?



- 68% of motorists think that Governments should provide incentives to encourage the take-up of electric vehicles.
- 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?



- Most motorists said they park their car overnight in their private garage or on their private driveway.
- Two thirds of motorists identified these as their preferred charging locations.

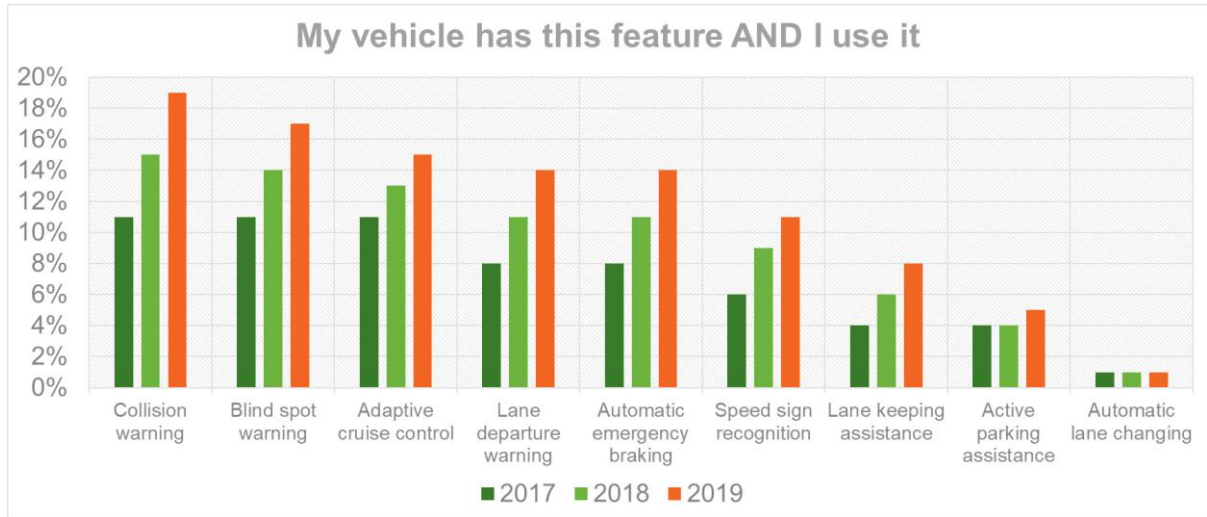
For further information:

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

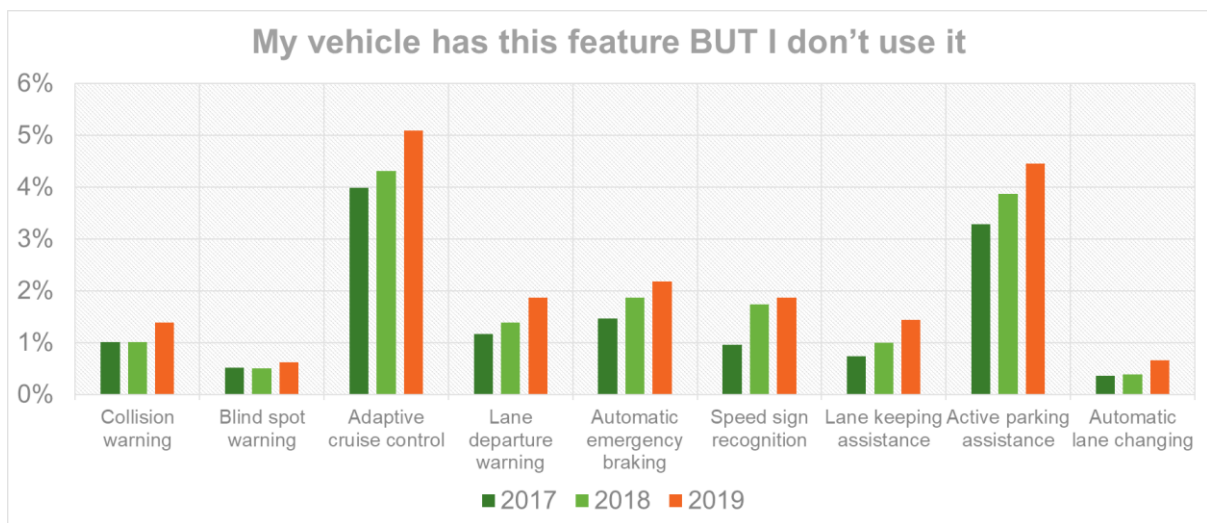


Driver assist functions – motorist’s *current* vehicle

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 exception is automatic lane changing, which has not yet made an impact.



- Usage of most driver assist functions is relatively good – with many more motorists who have the function using it compared to not using it.
- However, usage of adaptive cruise control and active parking assist is lagging usage of the other driver assist functions.

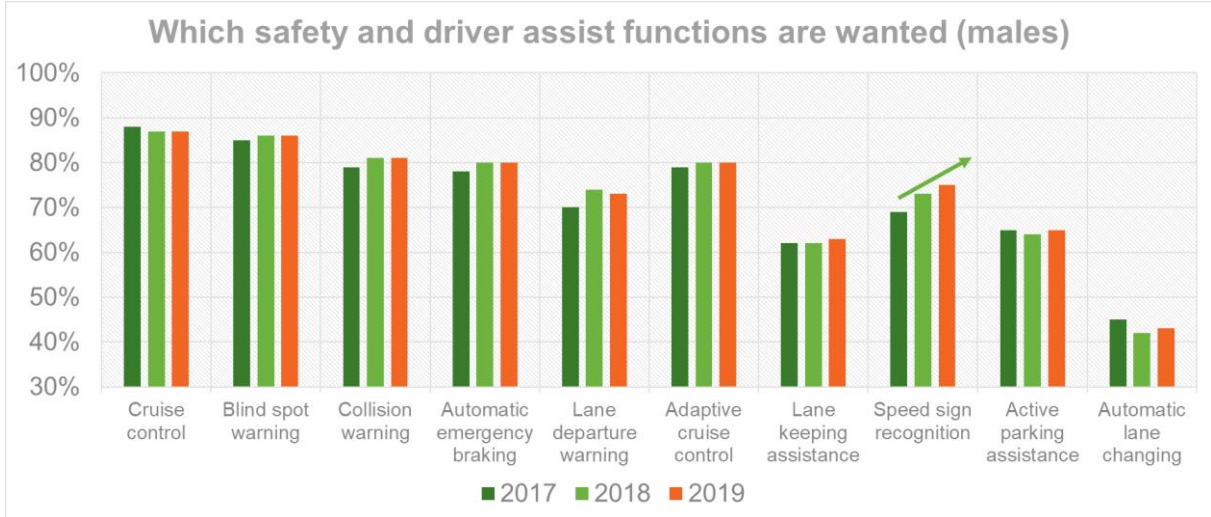
For further information:

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

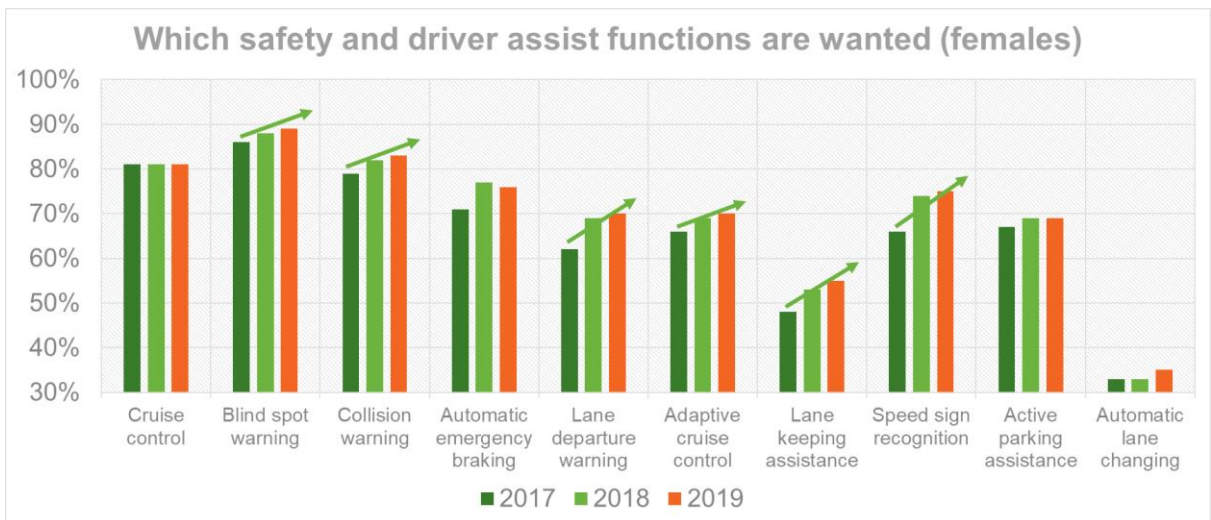


Driver assist functions – motorist’s *next* vehicle

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



- For male motorists, the desirability of most driver assist functions continues to be high, while speed sign recognition is steadily increasing in desirability.



- For female motorists, there has been a steady increase in the desirability of most driver assist functions. This is closing the gap in demand compared to male motorists.

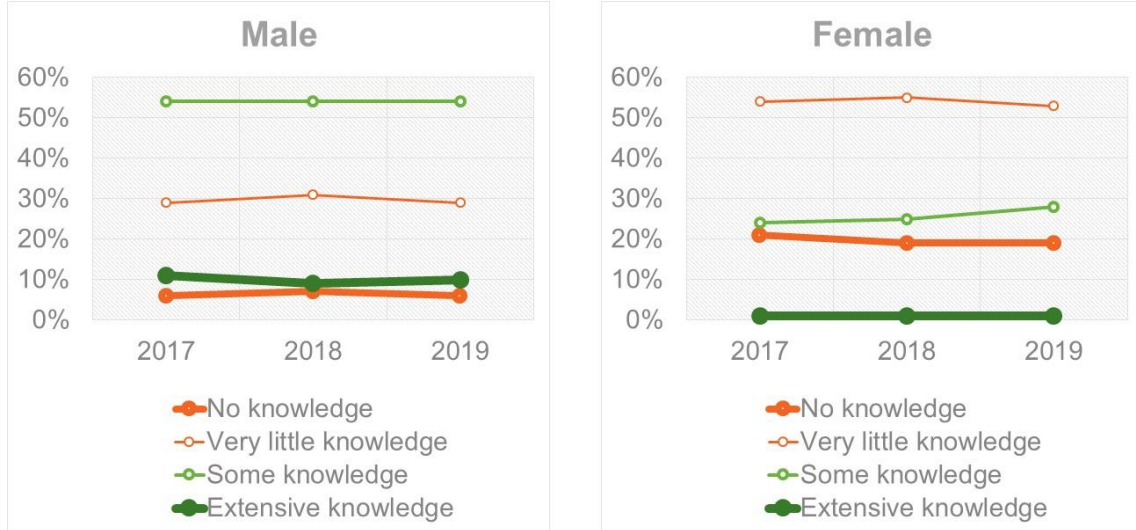
For further information:

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



Knowledge about self-driving cars

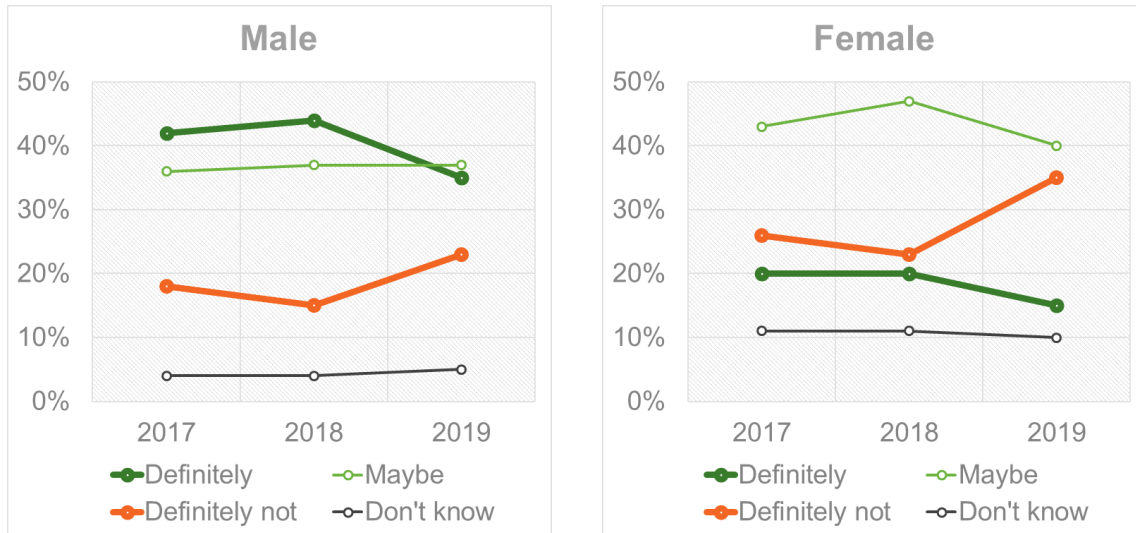
How much would you say you know about self-driving vehicles?



- Some female motorists consider themselves a bit more knowledgeable about self-driving vehicles compared to previous years.
- However, there is little evidence of any change for male motorists.

Hands-off driving and fully self-driving

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



- There has been a significant decline in the number of motorists – male and female – who say they could “definitely” imagine using hands-off driving on a freeway.

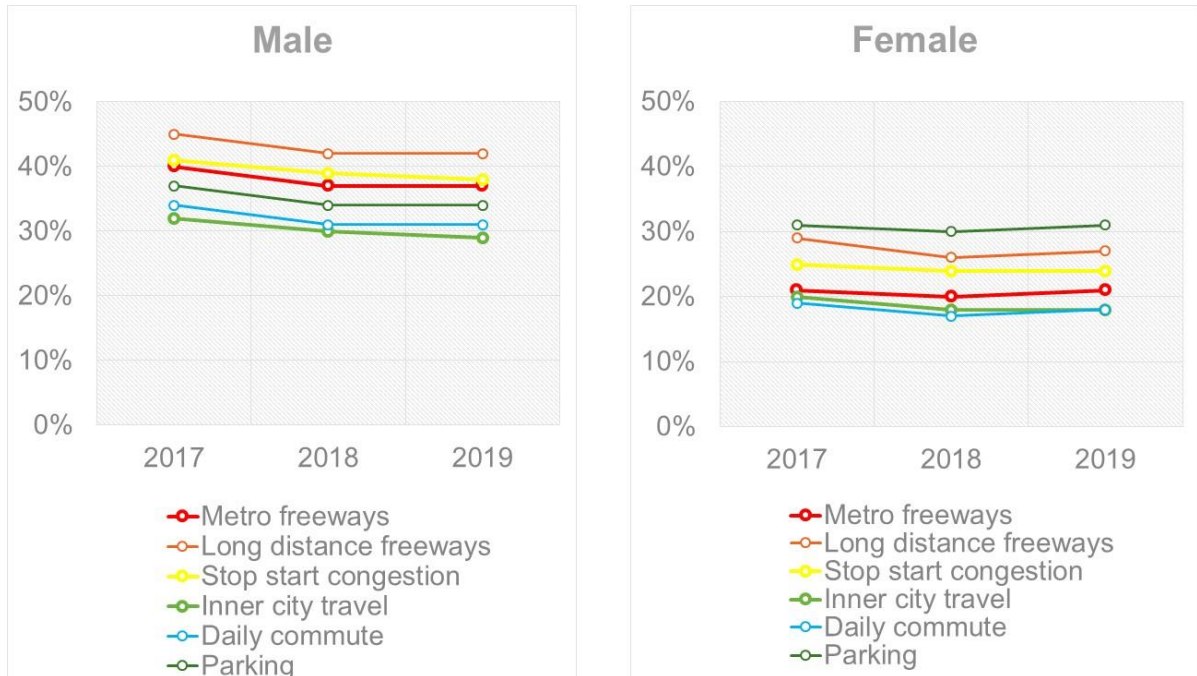
For further information:

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



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

“Definitely want it”:



- Since 2017, there has been a decline in the number of male motorists who say they “definitely want” vehicles to be able to drive themselves across a range of journey types.
- There is little evidence of any change for female motorists.

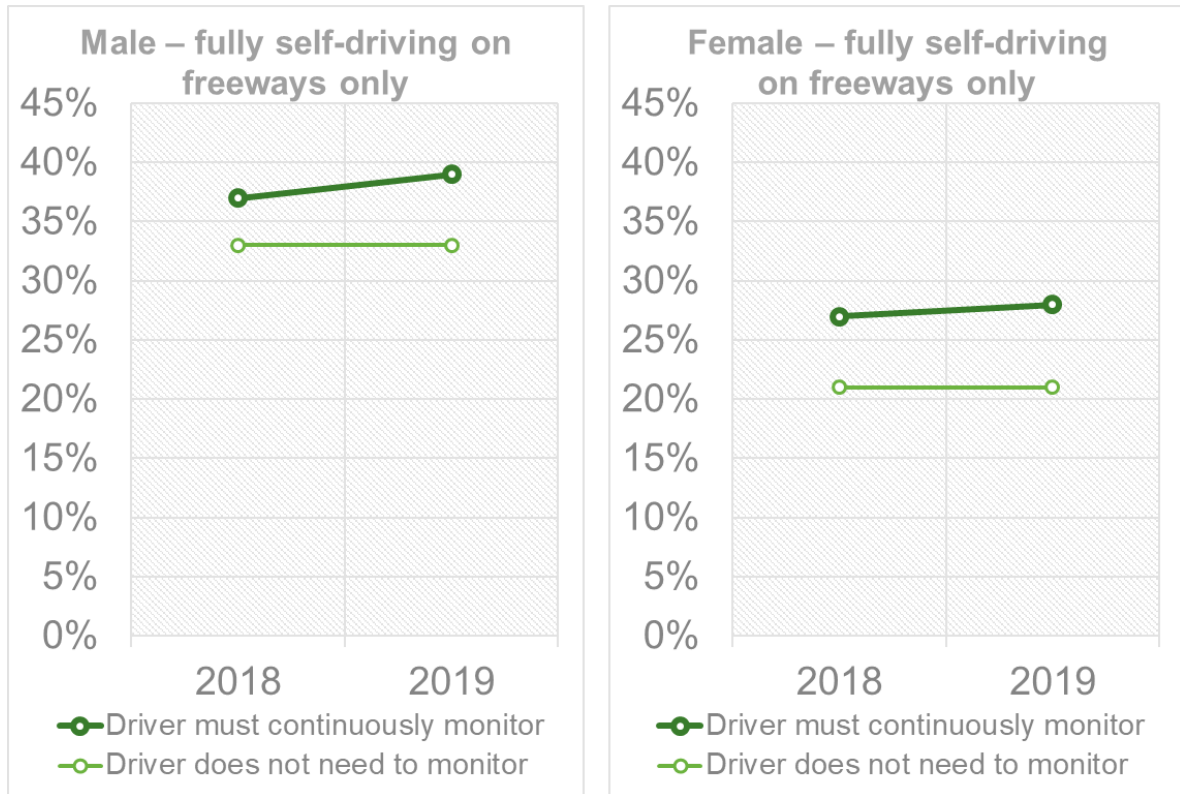
For further information:

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



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?



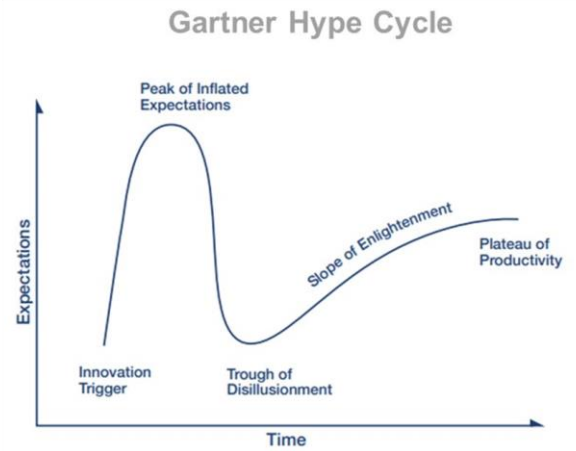
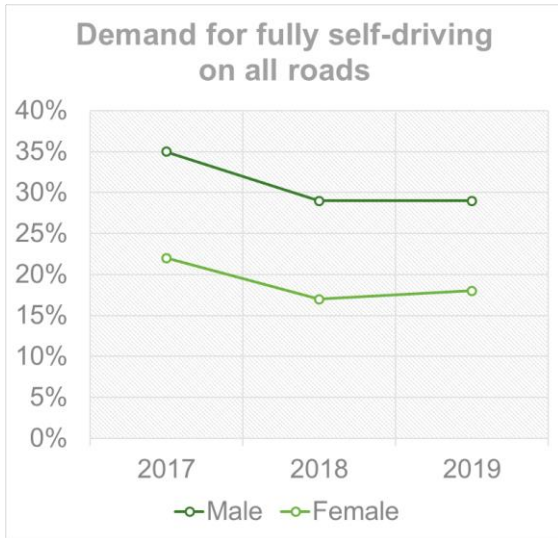
- There has been an increase in the number of motorists – male and female – who want their next vehicle to offer fully self-driving on freeways provided the driver must continuously monitor the vehicle at all times.
- However, there has been no change in the number of motorists – male and female – who want their next vehicle to offer fully self-driving on freeways with the driver not needing to monitor and the vehicle able to ask the driver to take back control.

For further information:

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



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 2017, motorists are still much less likely to want their next vehicle to offer fully self-driving on all roads.
- This, together with other results in the survey, indicates that motorists' expectations remain in Gartner's "trough of disillusionment" when it comes to fully self-driving on all roads.

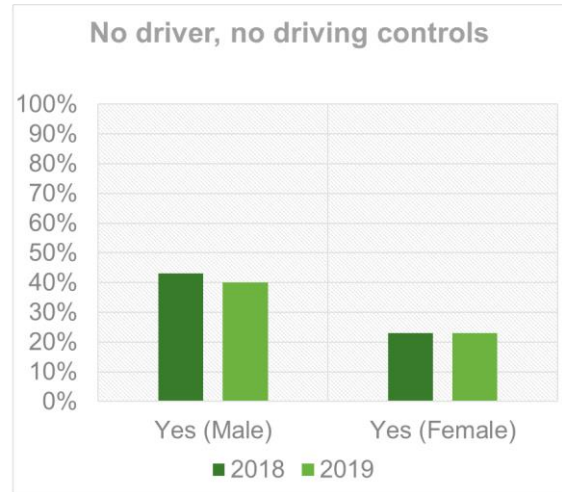
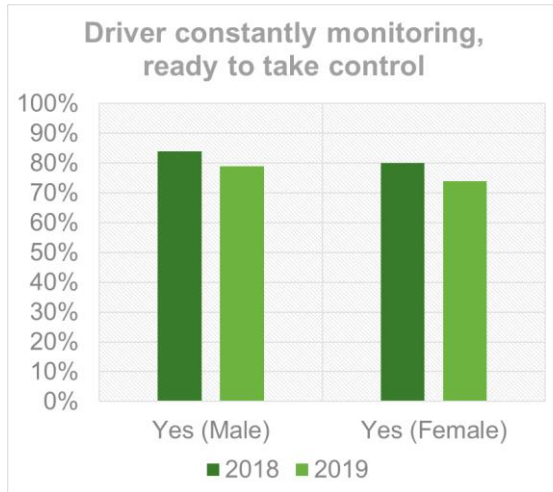
For further information:

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



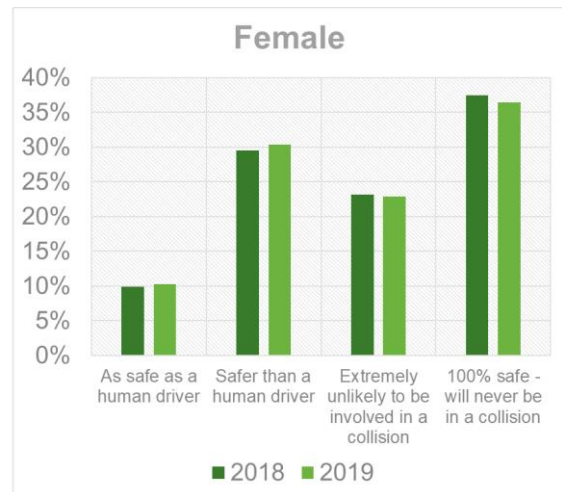
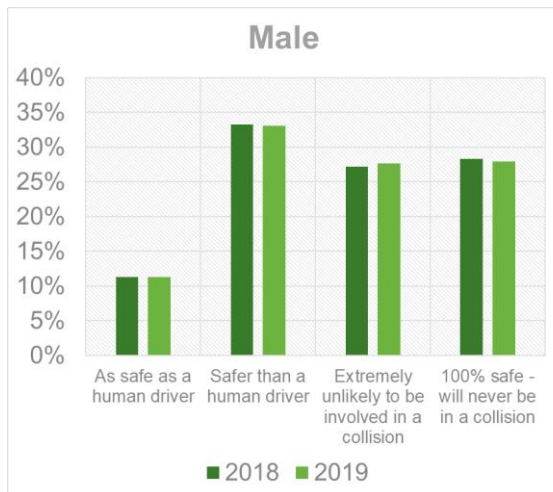
Safety and self-driving cars

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 a decline in the number of motorists – male and female – 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 a decline in the number of male 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.

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



- A significant proportion of motorists – 28% of male and 36% of female – continue to expect that fully self-driving cars should be 100% safe and will never be involved in a collision.
- This is an unrealistic expectation.

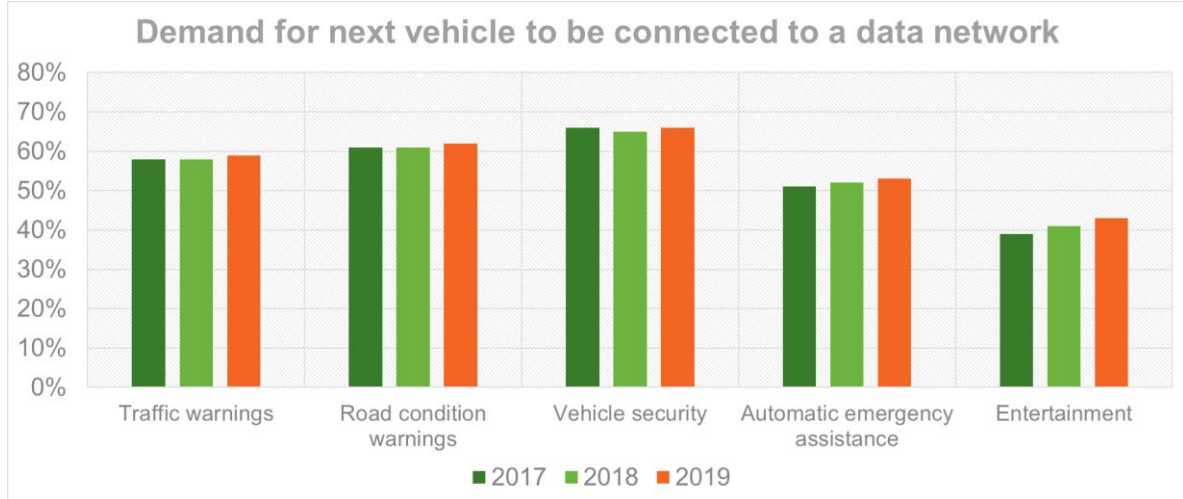
For further information:

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



Connected cars

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



- A clear majority of motorists still “definitely want” their next car to be connected to a data network for traffic warnings, road condition warnings and vehicle security features.
- Half of motorists still “definitely want” their next car to be connected to a data network for automatic emergency assistance.
- Four in ten motorists – increasing from year to year – now “definitely want” their next car to be connected to a data network for entertainment.

For further information:

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



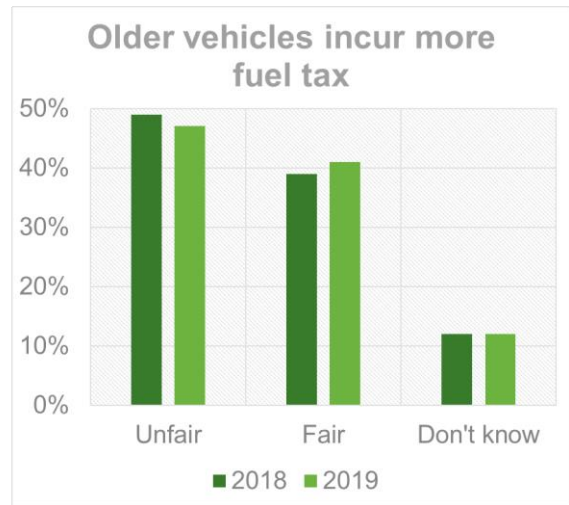
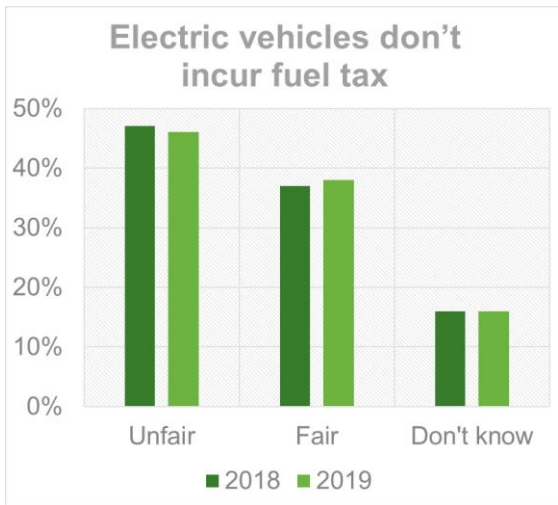
Road use charging

The price of petrol and diesel includes fuel tax. Fuel tax is approximately 41 cents per litre.

Fuel tax revenue is used by our Governments to help fund road maintenance.

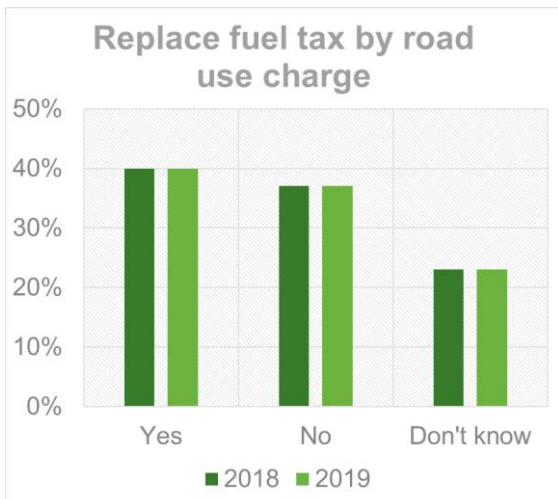
Now that you know this, do you think it's fair that fully electric vehicles use roads without incurring any fuel tax?

Do you think it's fair that older less efficient petrol/diesel vehicles incur more fuel tax than modern petrol/diesel vehicles?



- There has been a small increase in the proportion of motorists who think that that these aspects of the current fuel excise system are fair.

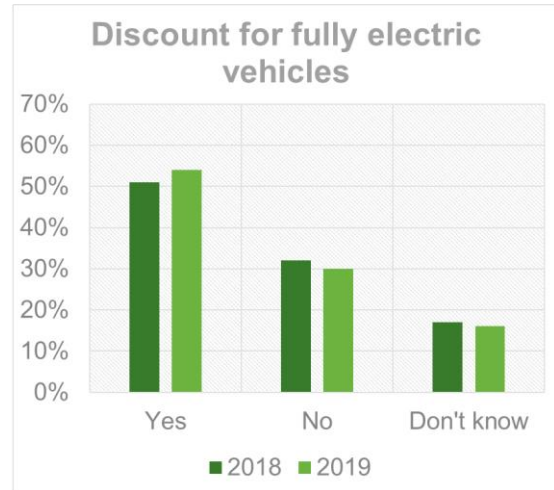
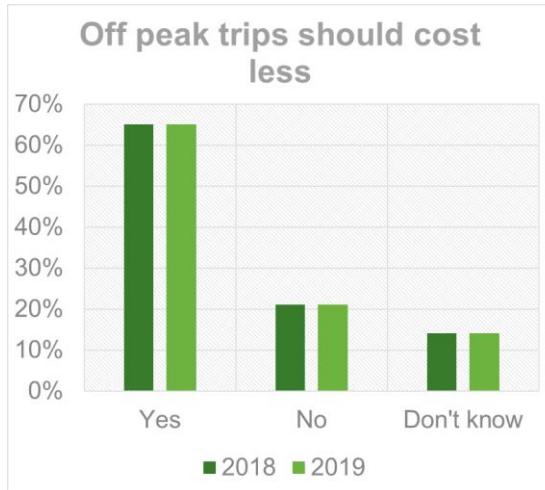
Do you think fuel tax should be replaced by a per-kilometre road use charge that EVERY vehicle is charged? (trucks would pay more per kilometre than cars)



- 63% of motorists continue to be unconvinced by road use charging.

If a road use charge is introduced by Governments in the future, do you think off-peak trips should cost less per kilometre than peak period trips?

If a road use charge is introduced by Governments in the future, do you think fully electric vehicles should get a discount to encourage take up of fully electric vehicles?



- If a road use charge is introduced by Governments in the future, a large majority of motorists continue to think off-peak trips should cost less per kilometre than peak period trips.
- If a road use charge is introduced by Governments in the future, more than half of motorists – an increase on the previous year – think fully electric vehicles should get a discount to encourage take up of fully electric 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

