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# Our future as drivers...motoring in the future

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# POSITIVE ABOUT TECHNOLOGY

## ATTITUDES TOWARDS TECHNOLOGY

To what extent do you agree or disagree with the following statements?

Technology generally makes life better

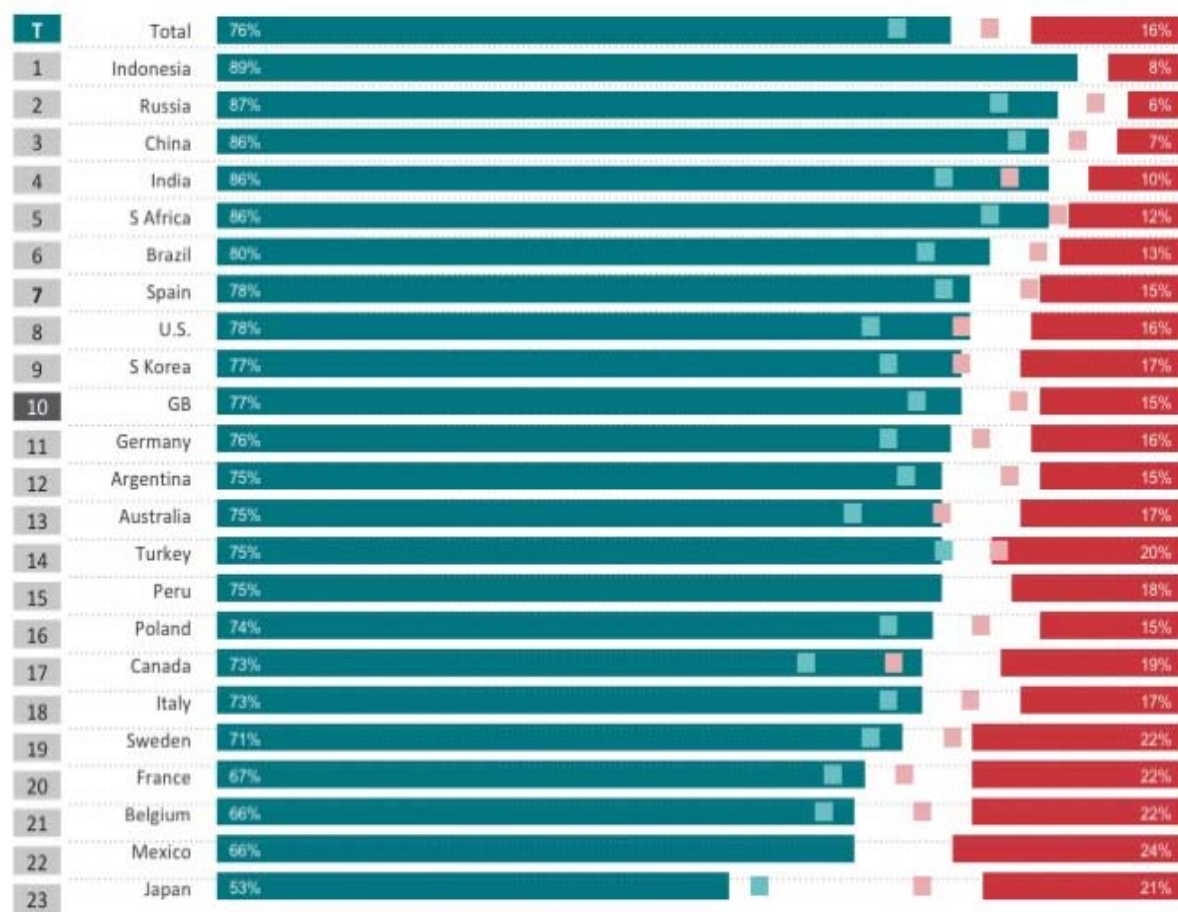
**KEY:**

Agree 2016

Disagree 2016

Agree 2014

Disagree 2014



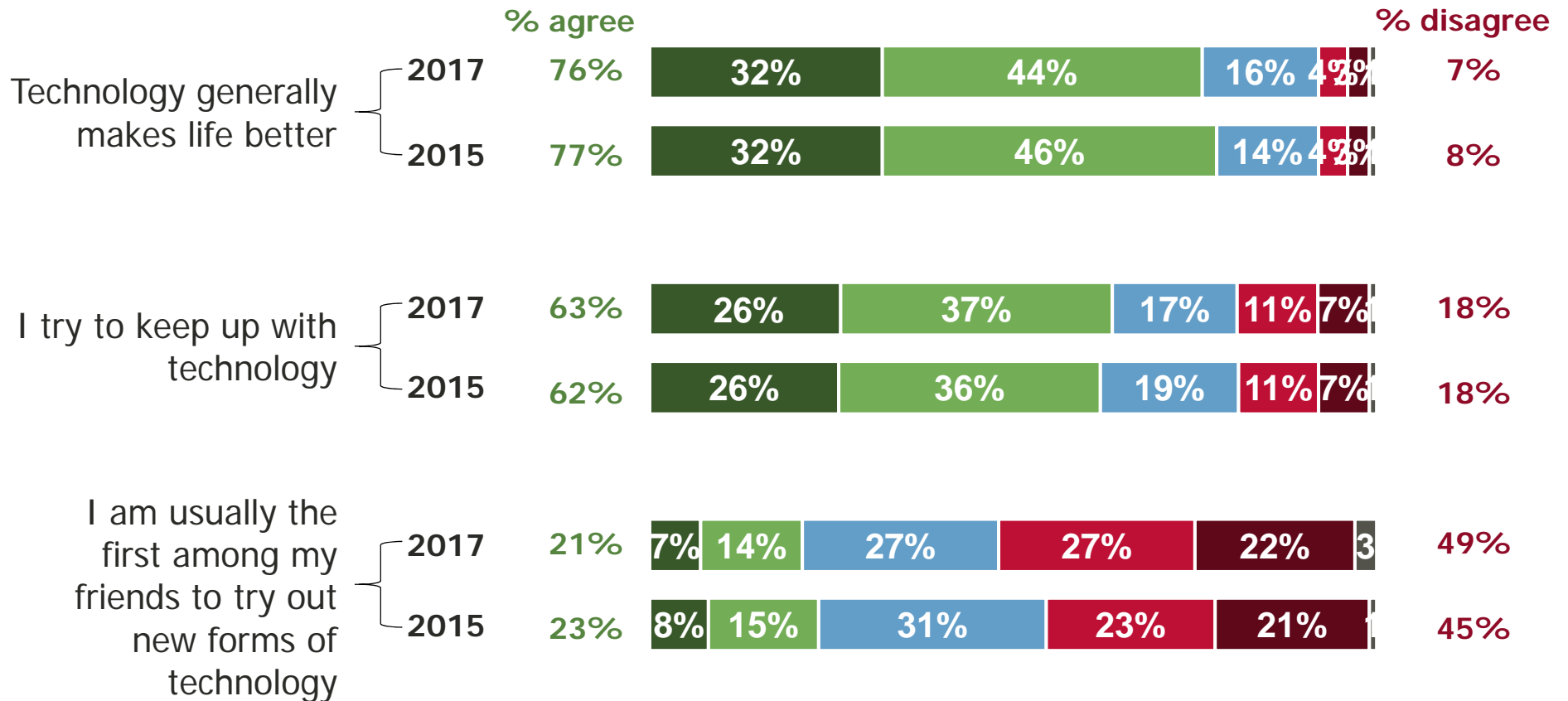
Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016



# POSITIVE ABOUT TECH

Q1. To what extent do you agree or disagree with the following statements?

■ Strongly agree  
 ■ Tend to agree  
 ■ Neither / nor  
 ■ Tend to disagree  
 ■ Strongly disagree  
 ■ Don't know



Base: All adults aged 16-75 in Great Britain (2,154) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

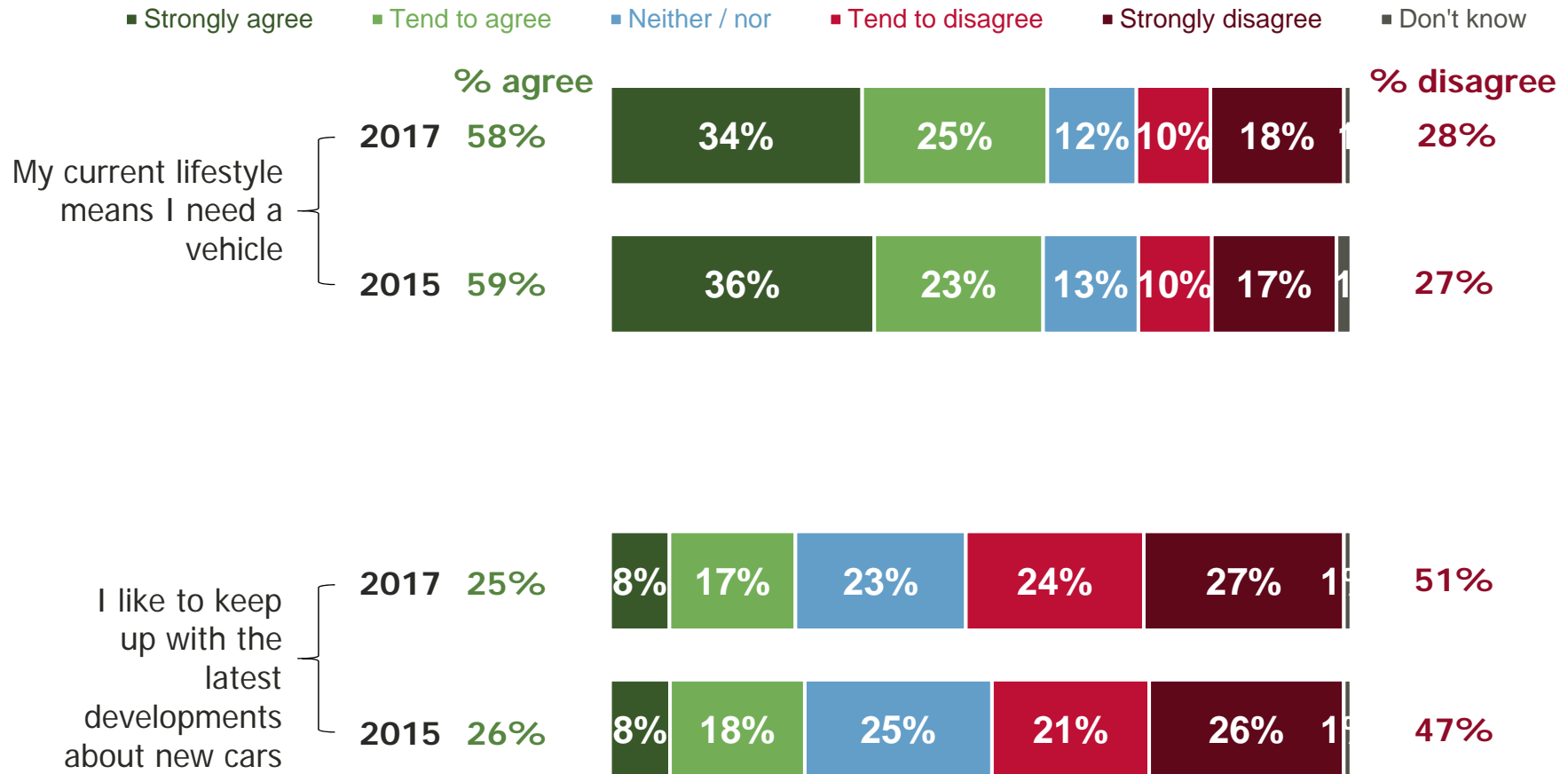
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# WANT CARS – BUT NOT IN LOVE

Q6. To what extent do you agree or disagree with the following statements?



Base: All adults aged 16-75 in Great Britain (2,154) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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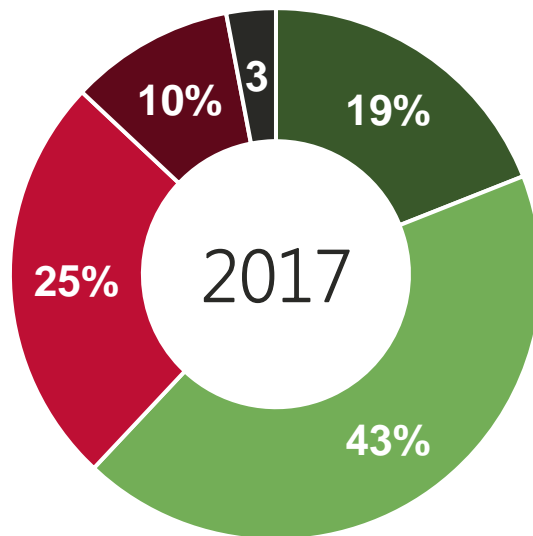




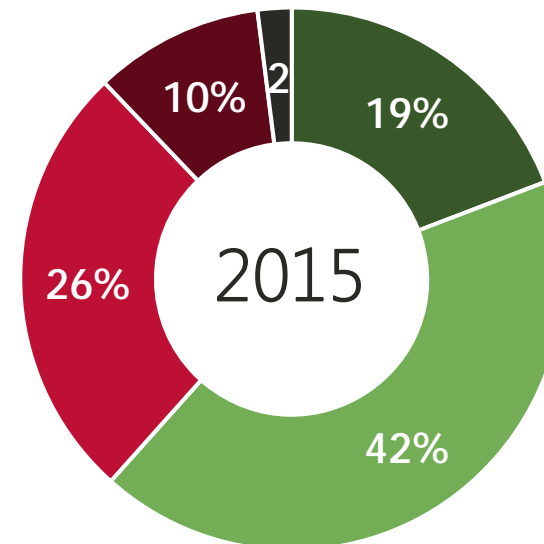
# INTERESTED IN CONNECTED CARS

Q7. Vehicle technologies are increasingly connecting the driver to their vehicle (e.g. tyre pressure), their journey (e.g. traffic alerts) and the outside world (e.g. text messages, phone calls). To what extent, if at all, are you interested in these 'connected driving technologies'?

- Very interested
- Fairly interested
- Not very interested
- Not at all interested
- Don't know



Interested	62%
Not interested	35%



Interested	61%
Not interested	36%

Base: All who currently drive or are considering buying a vehicle in the next 1-2 years (1,621) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

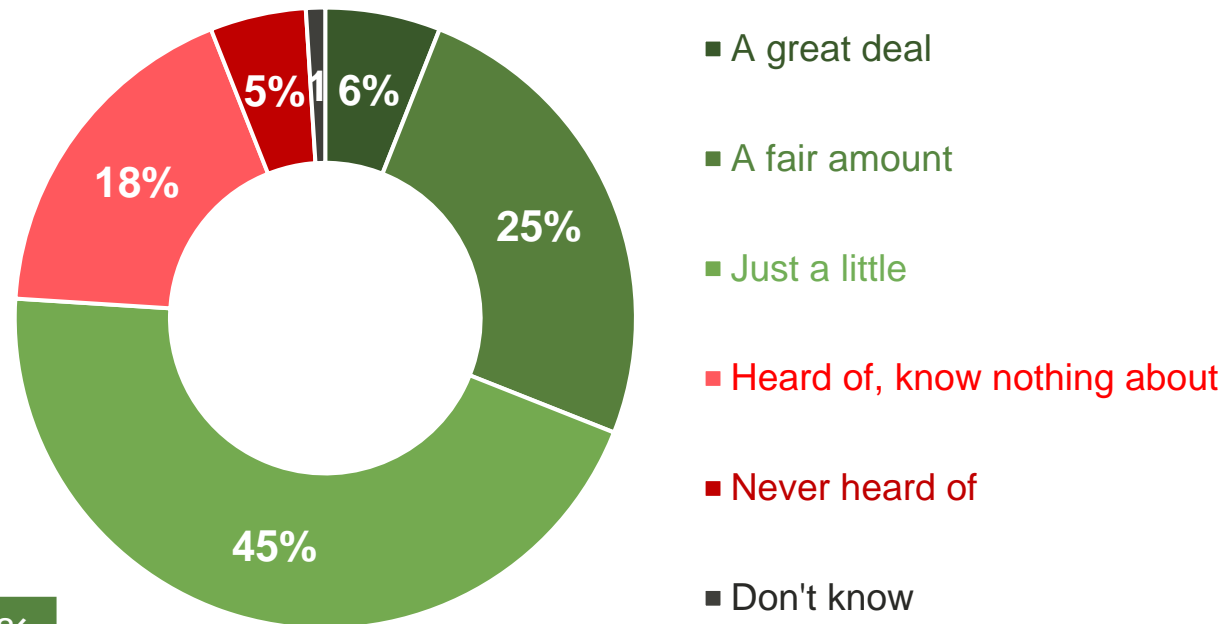
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## GOOD CLAIMED KNOWLEDGE

Q8. Vehicle technologies are increasingly incorporating 'driver assistance' systems that operate automatically, such as cruise control and automatic parking. How much, if anything, would you say you know about 'driver assistance' technologies?



A great deal/fair amount	31%
Just a little/heard of	63%
Heard of (all)	94%

Base: All who currently drive or are considering buying a vehicle in the next 1-2 years (1,621) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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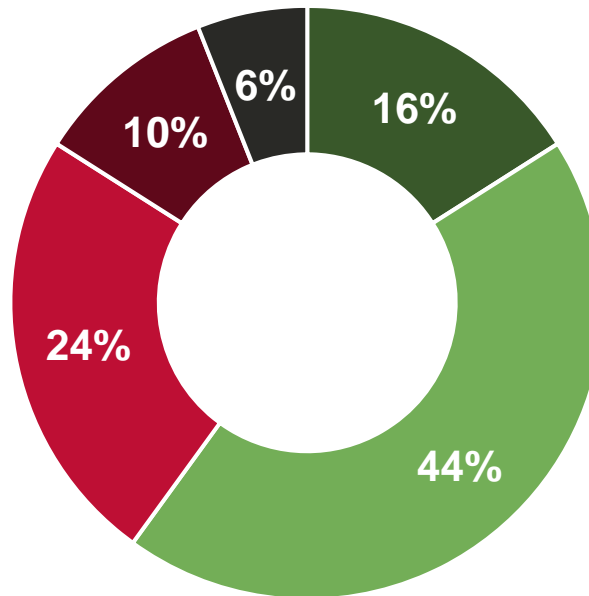




# REAL INTEREST IN DRIVER ASSISTANCE

Q9. To what extent, if at all, would you be interested in having these 'driver assistance' technologies in your vehicle?

- Very interested
- Fairly interested
- Not very interested
- Not at all interested
- Don't know



Interested	60%
Not interested	34%

Base: All who currently drive or are considering buying a vehicle in the next 1-2 years (1,621) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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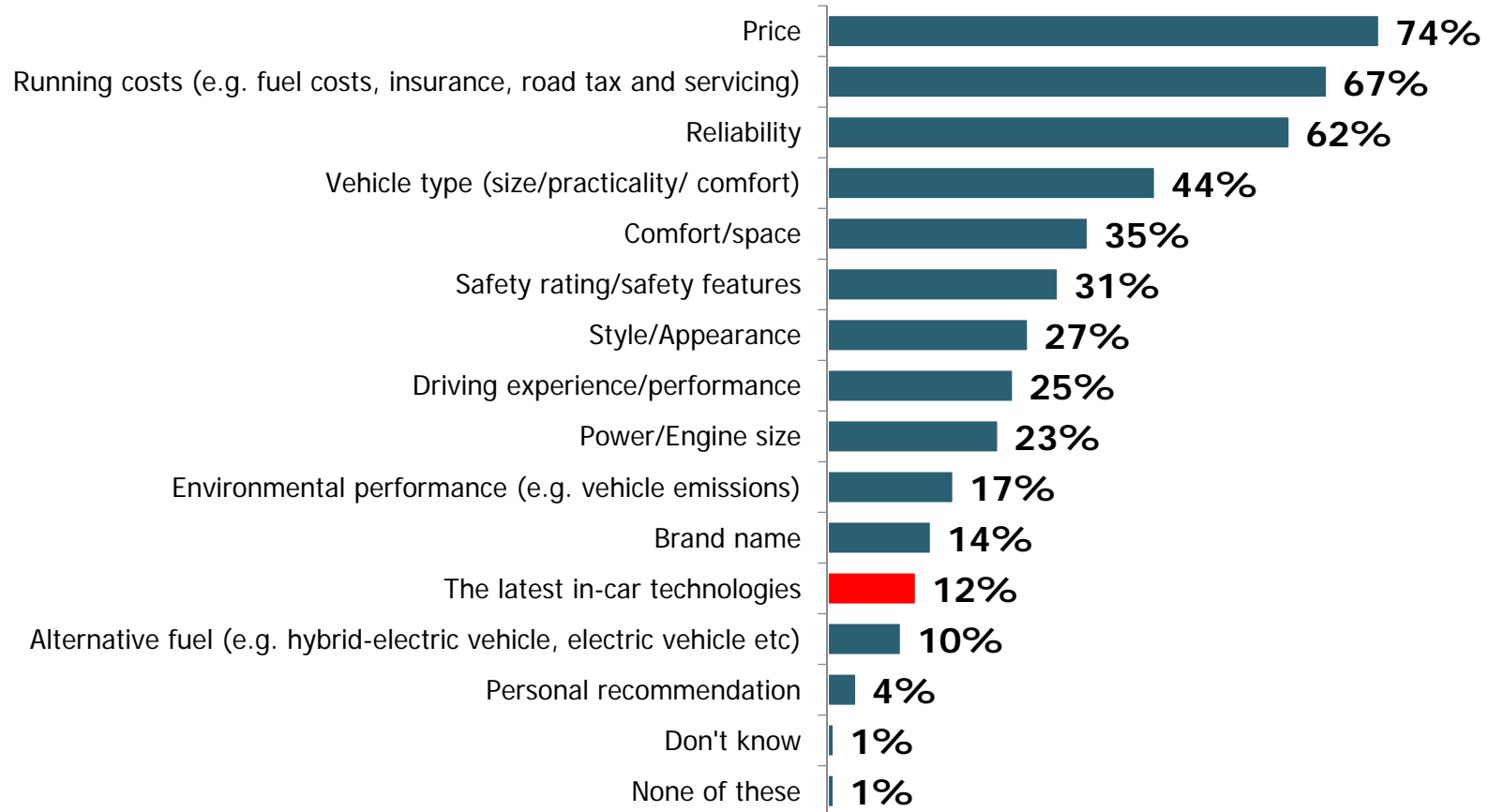






# BUT PRICE HAS TO BE RIGHT

**Q10. If you were looking to buy a new or used vehicle, which, if any, of these factors would be the most important in helping you make your decision?**



Base: All who currently drive or are considering buying a vehicle in the next 1-2 years (1,621) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

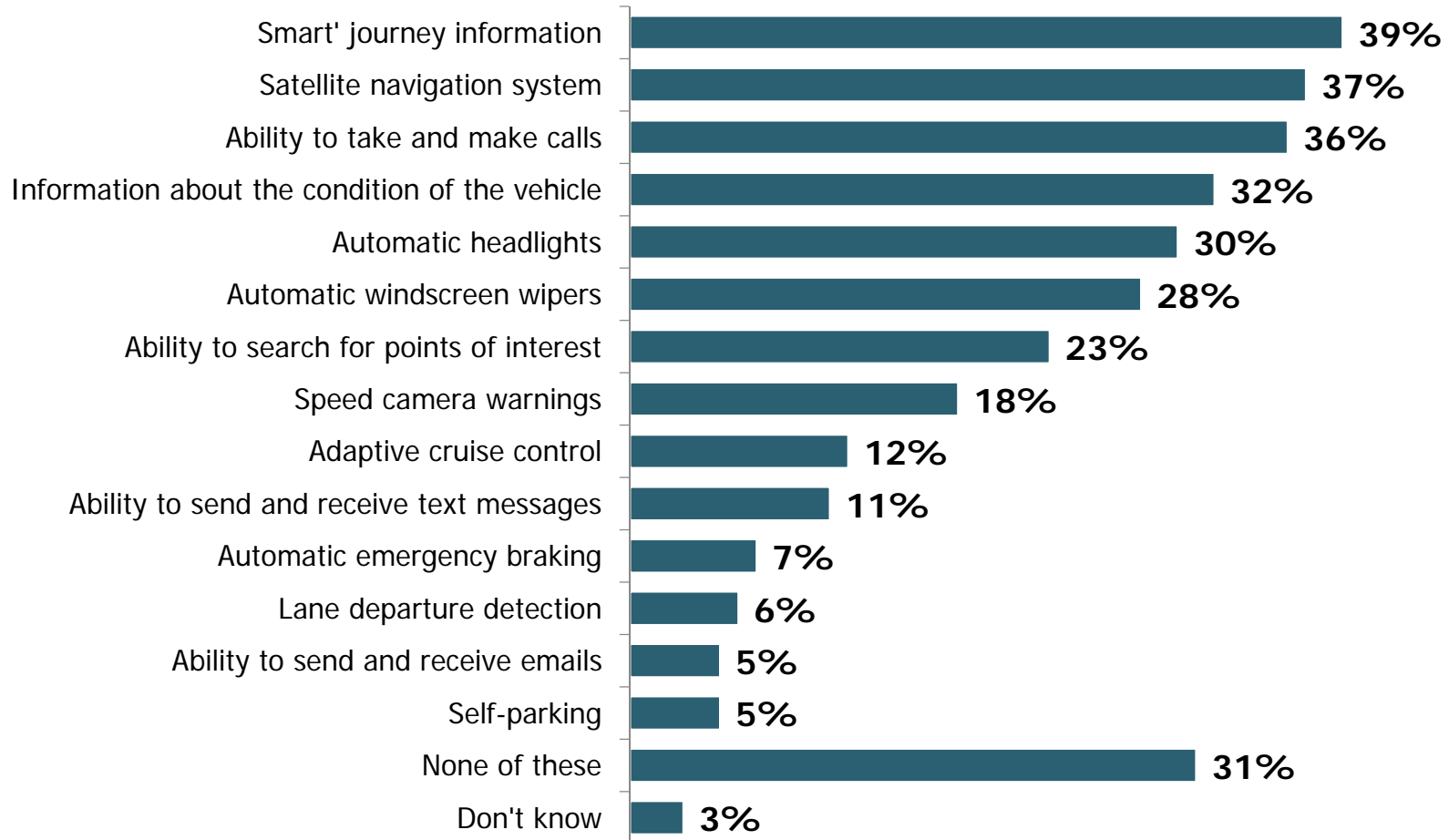
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# WHAT DO THEY CURRENTLY HAVE

Q12. Which of the following features, if any, do you have in this vehicle?



Base: All drivers who have at least 1 vehicle in their household (1,474) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

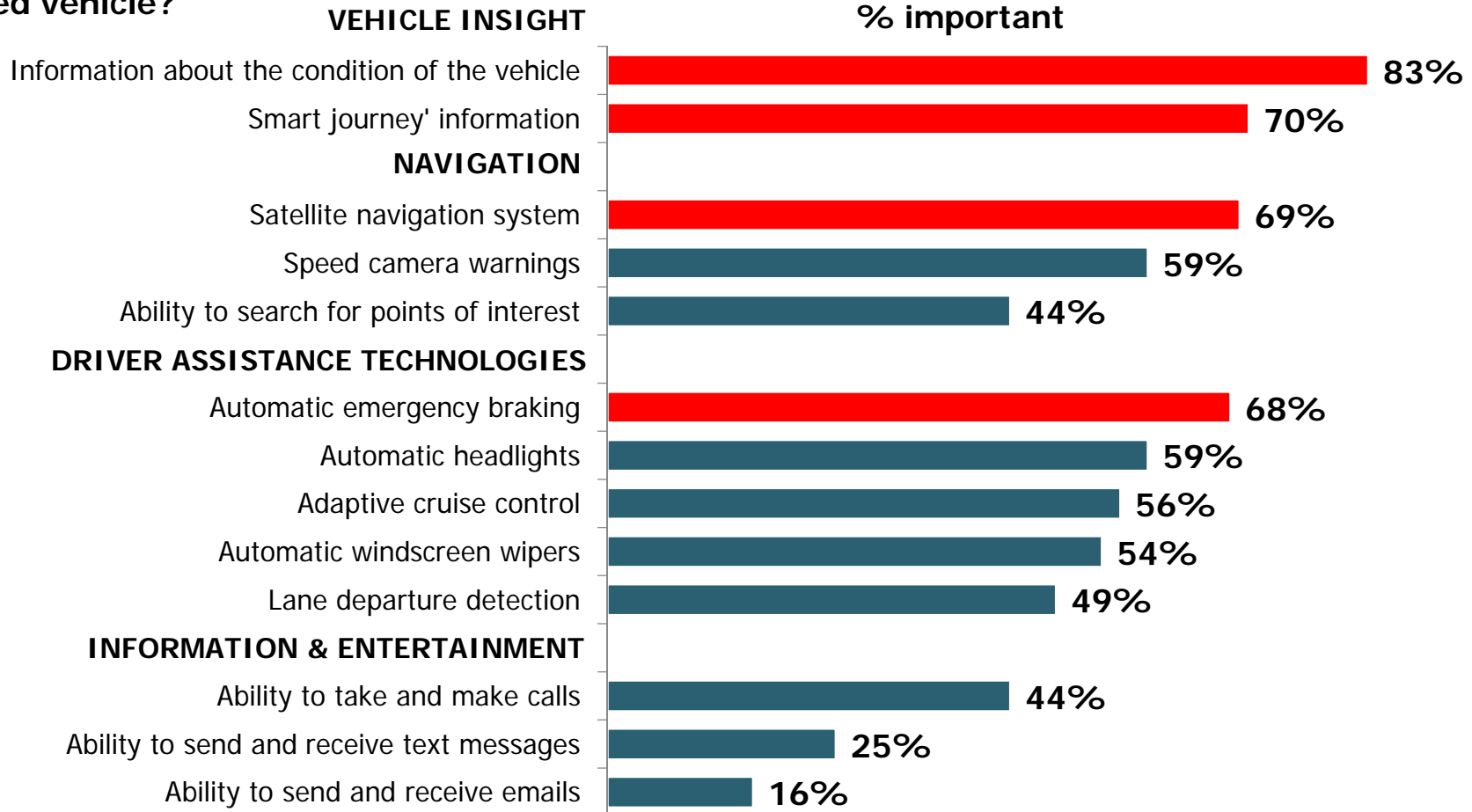
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# WHAT DO THEY WANT....

Q11. How important, if at all, would this feature be to you if you were looking to buy a new or used vehicle?



Base: All who currently drive or are considering buying a vehicle in the next 1-2 years (1,621) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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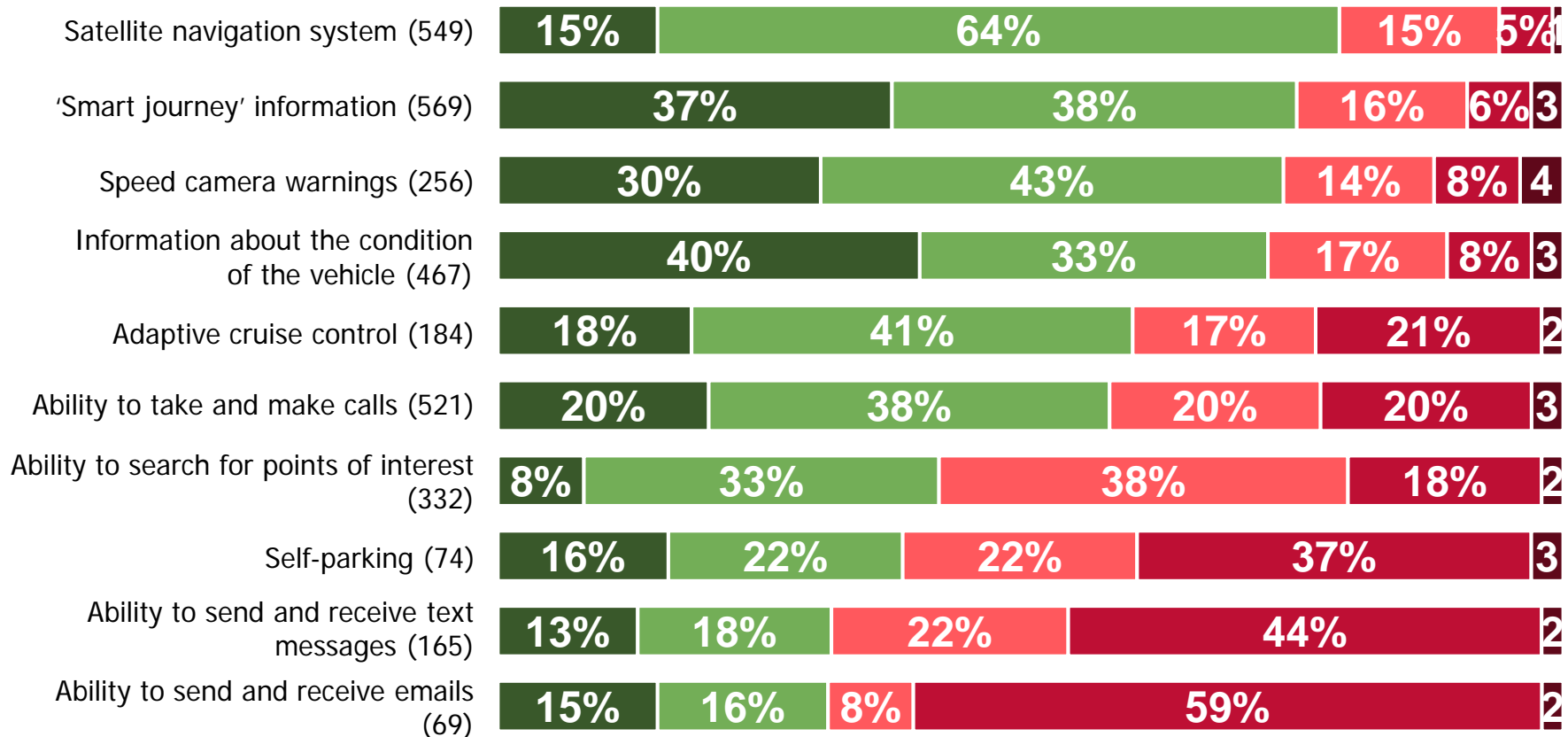




# NAVIGATION CURRENTLY DOMINATES

Q13. How often, if at all, do you personally, as a driver, use this feature?

- Always when I drive
- Sometimes when I drive
- Hardly ever when I drive
- Never when I drive
- Don't know



Base: All drivers who have at least 1 vehicle in their household (1,474) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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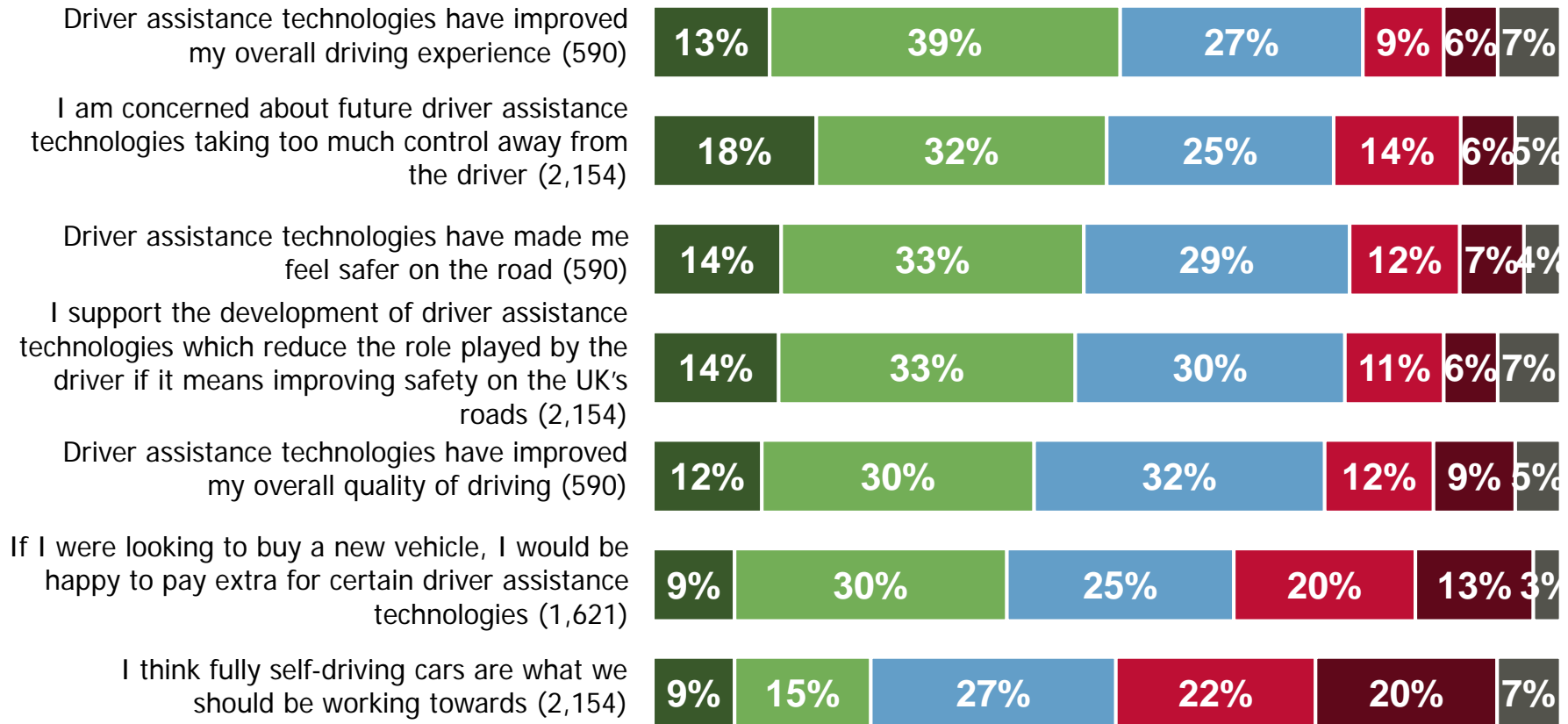




# WARY OF SELF DRIVING CARS

## Q14. To what extent do you agree or disagree with these statements?

■ Strongly agree  
 ■ Tend to agree  
 ■ Neither / nor  
 ■ Tend to disagree  
 ■ Strongly disagree  
 ■ Don't know



Base: All adults aged 16-75 in Great Britain (see above); All who have a vehicle with at least one form of driver assistance technology in their vehicle (see above); All who currently drive or are considering buying a vehicle in the next 1-2 years (see above); Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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# IS THIS HAVING AN EFFECT?

## Driverless cars: safer perhaps, but professor warns of privacy risks

<https://www.theguardian.com/technology/2017/sep/22/driverless-cars-safer-perhaps-but-professor-warns-of-privacy-risks>

## Volvo's driverless cars 'confused' by kangaroos

<http://www.bbc.co.uk/news/technology-40416606>

## Car makers told to do more to stop hackers taking over internet-connected vehicles

<http://www.telegraph.co.uk/news/2017/08/05/car-makers-told-do-stop-hackers-taking-internet-connected-vehicles/>

## Tesla driver dies in first fatal crash while using autopilot mode

The autopilot sensors on the Model S failed to distinguish a white tractor-trailer crossing the highway against a bright sky

<https://www.theguardian.com/technology/2016/jun/30/tesla-autopilot-death-self-driving-car-elon-musk>

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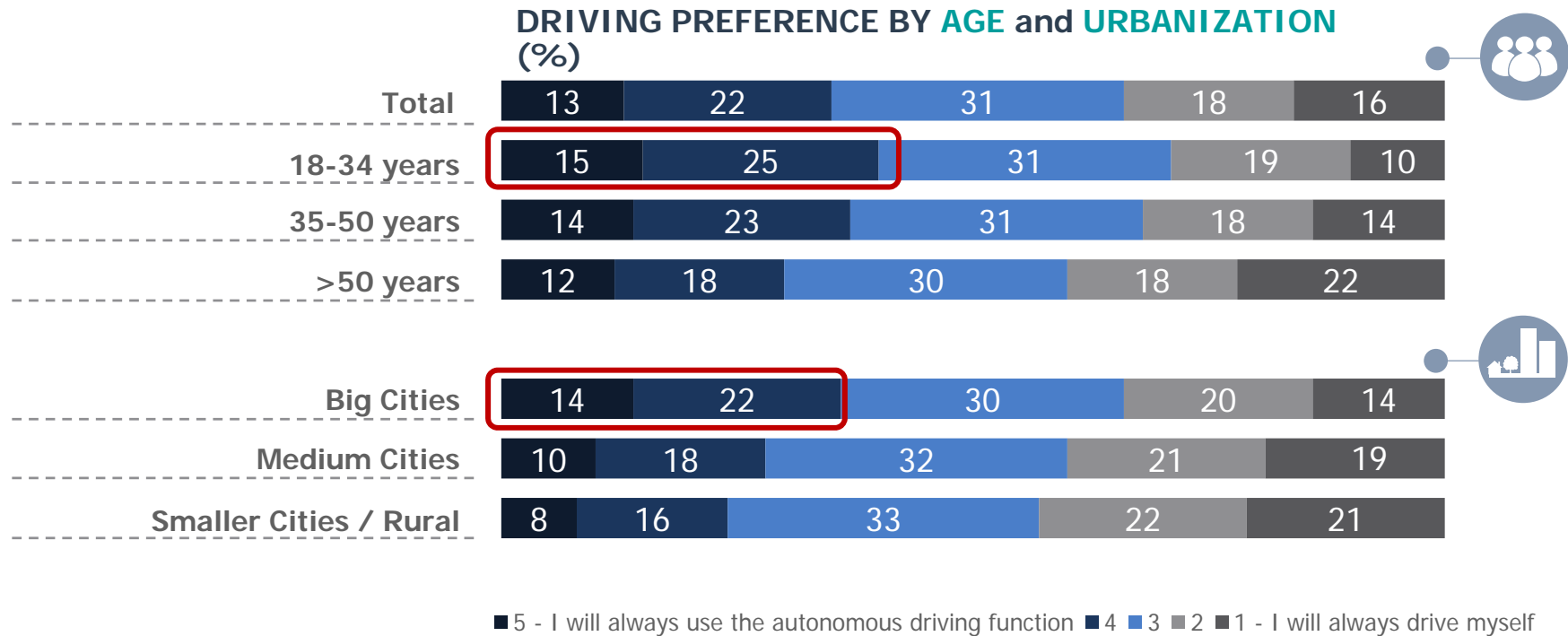


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# ONLY A MINORITY WILL USE IT?

Q21: Let's assume your car in 2023 will have a fully automated driving function, which you can switch on and off. How often would you drive on your own versus let the car drive automatically?



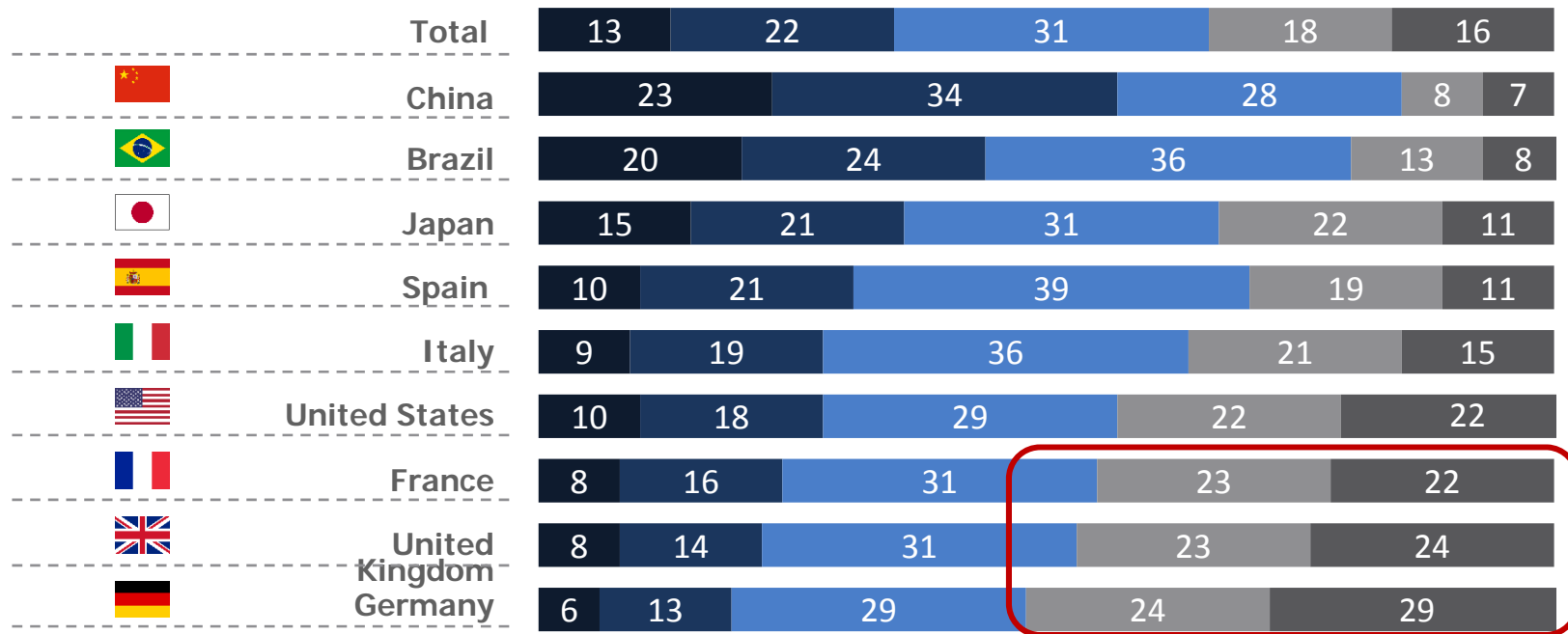
Base: Total n=137,340; 18-24 yrs n=29820; 35-50 yrs n=49,751; >50 yrs n=57,769; Big Cities n=13,818; Medium Cities n=86,008; Small Cities / Rural areas n=29,967 (all excl. China / will be added in module 2) : Fieldwork dates: Q1 2017



# BRITISH AND GERMANS LEAST KEEN

Q21: Let's assume your car in 2023 will have a fully automated driving function, which you can switch on and off. How often would you drive on your own versus let the car drive automatically?

DRIVING PREFERENCE BY COUNTRY (%)



■ 5 - I will always use the autonomous driving function ■ 4 ■ 3 ■ 2 ■ 1 - I will always drive myself

Base: Total n=137,340; China n=7,283; Brazil n=5,218; Japan n=9,060; Spain n=10,859; USA n=22,665; France n=31,612; UK n=19,249; Germany n=14,580 : Fieldwork dates: Q1 2017

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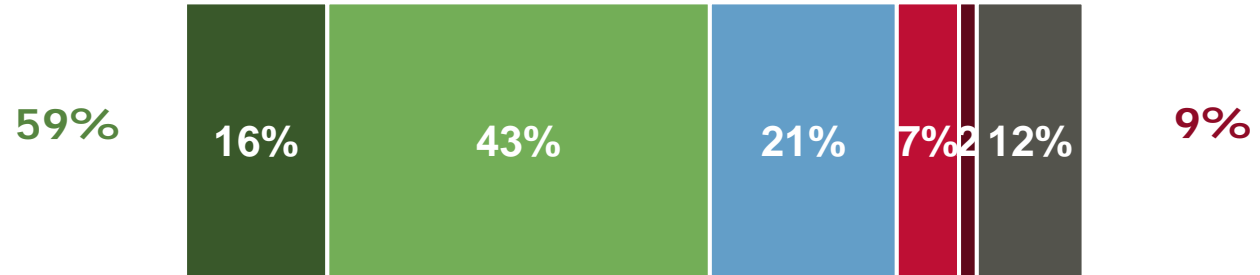


# CHANGE THE DRIVING TEST?

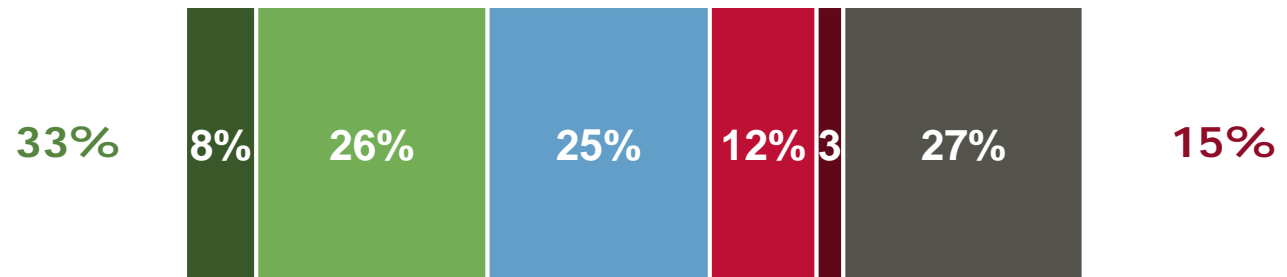
Q16. To what extent do you agree or disagree...?

- Strongly agree
  - Tend to agree
  - Neither / nor
  - Tend to disagree
  - Strongly disagree
  - Don't know
- % agree % disagree

The way people are taught to drive in the UK should be updated to reflect the new technologies in vehicles nowadays



I don't believe the UK driving test has kept up-to-date with the new technologies in vehicles nowadays



Base: All adults aged 16-75 in Great Britain (2,154) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

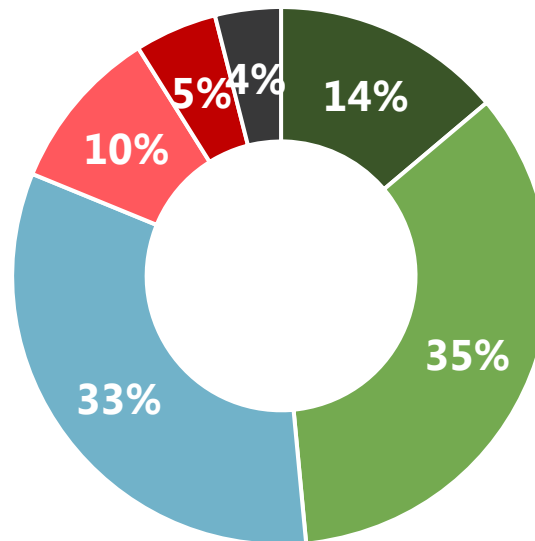
Source: Ipsos MORI



# SUPPORT FOR NEW DRIVING TEST

Q17. The Driver and Vehicle Standards Agency (DVSA) recently confirmed that from 4 December 2017 the majority of driving tests will include a section where the candidate will be asked to follow directions from a DVSA supplied satnav. To what extent do you support or oppose the use of a satnav to provide route information to candidates in future driving tests, or do you have no feelings either way?

■ Strongly support ■ Tend to support ■ Neither/nor ■ Tend to oppose ■ Strongly oppose ■ Don't know



Support	49%
Oppose	14%

Base: All adults aged 16-75 in Great Britain (2,154) : Fieldwork dates: 14<sup>th</sup> – 18<sup>th</sup> July 2017

Source: Ipsos MORI

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## SOME THOUGHTS

Hard for people to anticipate how will adapt or adopt new technologies

Real interest in many automated/assisted features

Price – as well as regulation – will drive adoption

Big psychological adjustments to come....

Over to you!



# THANK YOU

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