

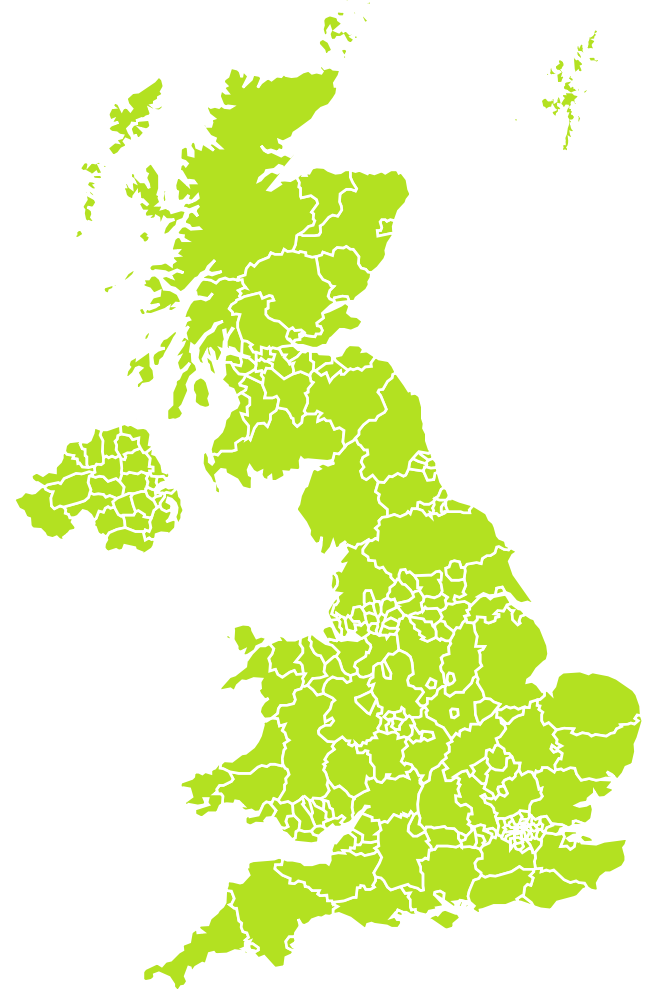
# What we learned in 2016

## Britain and self-driving vehicles



Over 3,000 people from all backgrounds across the UK completed the UKAutodrive Survey (UKADS) during the autumn of 2016.

Here are a few insights from what we learned.



## UKAutodrive

### OBJECTIVE

There is an increasing interest in developing connected and self-driving vehicles because of the benefits they might bring in terms of **improved road safety, congestion relief, reduced emissions, and increased productivity.**

These are the underlying principles behind self-driving vehicle innovations and what we seek to measure in this work.

### Attitudes

In the full-scale collection, participants from all parts of the UK, covering metropolitan cities to rural areas, provided input.

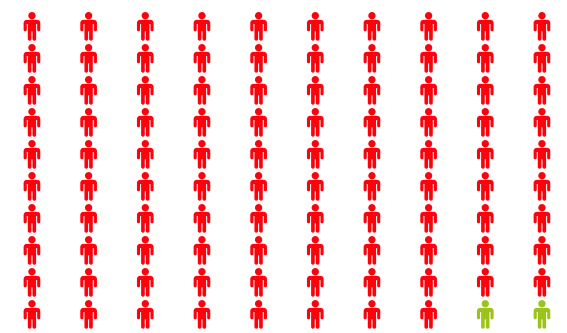
We assessed how certain aspects of daily life and individual circumstances influence attitudes toward SDV, and how these might be useful for delivering UKAutodrive in a way that meets the needs of the British public.



### Commute Difficulties

Would it surprise you that **98%** of the population faces at least one major difficulty on their daily commute?

Amazingly, **20%** of participants experience more than three difficulties every day!



### Inside the attitudes

#### Snapshots

With 49 variables and many sub-levels to certain items, UKADS can be a lot to chew on. We have extracted some of the key insights from more complex analyses, focusing on the nine key attitude items, which add up to comprise the Public Attitudes toward Self-driving Vehicle score, known as PATSV.

#### Enjoyment & stress

There is only a very small relationship between the enjoyment people got from their current travel and the likelihood they would use self-driving cars.

Also, across the country, **39%** of people said that their daily journey **adds some or a lot of stress**, and **22%** said they **experience some or a lot of enjoyment on their daily journey**.

### Applying what we learned: Key variables

1

#### AGE MATTERS

Young people and working-age adults report the greatest difficulties in travel and the most positive attitudes toward SDVs.

2

#### ACCESS AS AN OBSTACLE

Three in ten people say that walking or cycling (or both) is not a realistic option, though their attitudes are no different toward SDVs.

3

#### BIG CITIES MORE DIFFICULTY

Those who live in cities record a greater number of difficulties in regular travel than those in smaller towns or rural areas.



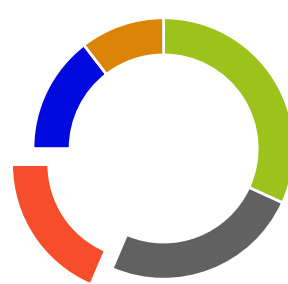
## No, thanks.

Participants were asked what might increase their likelihood of using SDVs and could give multiple answers.

However, **one in three individuals gave no indication that anything would change their opinion.**

Route correction and WIFI were the most likely to increase the chance someone would use an SDV.

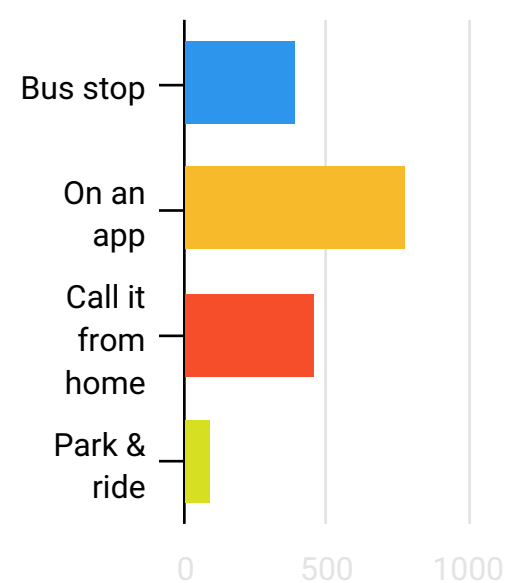
### What changes attitudes?



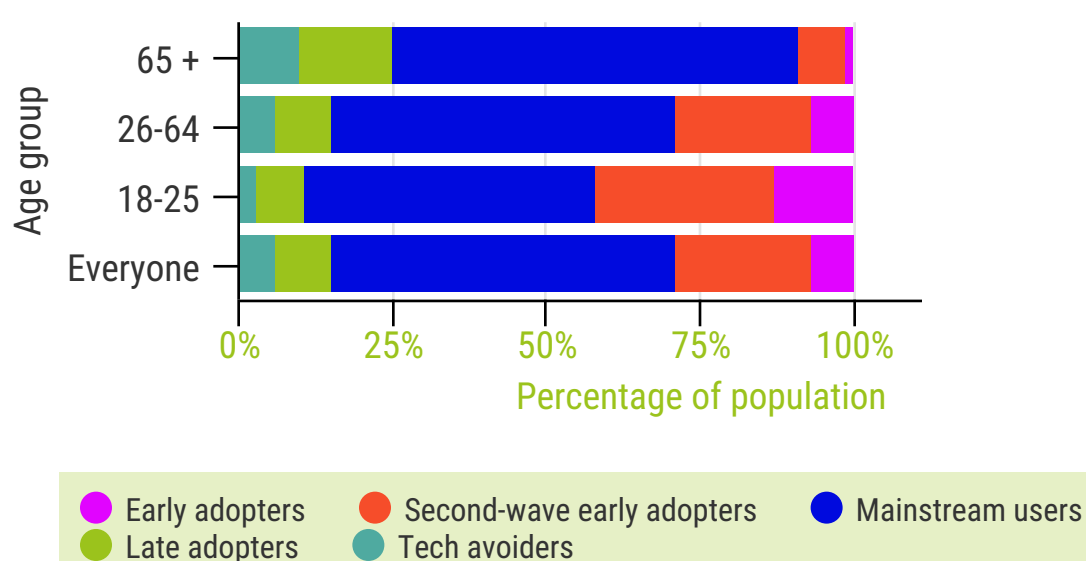
CONTROL OVER ROUTE  
NOTHING  
INTERACTIVE SCREENS  
WIFI  
INFOTAINMENT

### CALL ME ON MY CELL PHONE?

For the 1,700 people (over 50%) who would use SDVs, the most popular way to access it is via a smartphone app.



### Generational patterns using new technologies



### Generational differences in tech Adaptation?

When we looked only at general willingness to use new technologies – not simply SDVs – we found clear differences in the patterns between generations.

Younger people between 18 and 24 are much more likely to immediately use new technologies, either being the first or amongst the first to purchase when something is released. Additionally, a much smaller number of young people are likely to avoid new technologies entirely than working age or older people. Still, across all groups, the majority of the population prefers to wait until something has hit the mainstream and price has dropped.