



Executive Summary – Car Survey

On behalf of Aviva

Fieldwork: 1st - 6th March 2019

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Executive Summary of Key Findings:

Introduction

This Key Findings report is based on the results from Aviva 'Car Drivers' survey; fieldwork was undertaken between 21st - 22nd March. The survey questions were asked to a nationally representative GB sample of n=2,019 adult respondents aged 18+ of which 1,487 were identified to be regular driver (who drive "less often than once a week". This survey was conducted online¹

Sample

For this nationally representative survey² This survey has been conducted using an online interview administered to members of the YouGov Plc UK panel of 800,000+ individuals who have agreed to take part in surveys. Emails are sent to panellists selected at random from the base sample. The e-mail invites them to take part in a survey and provides a generic survey link. Once a panel member clicks on the link they are sent to the survey that they are most required for, according to the sample definition and quotas. (The sample definition could be "GB adult population" or a subset such as "GB adult females"). Invitations to surveys don't expire and respondents can be sent to any available survey. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is normally derived from census data or, if not available from the census, from industry accepted data.

Background

The survey was conducted by YouGov on behalf of Aviva to investigate the "Car Drivers" and the types of equipment and technology that they currently use in their car what they would be likely to use in the future. The survey also looked at drivers perceptions of technology and their motivations behind using or not using technology.

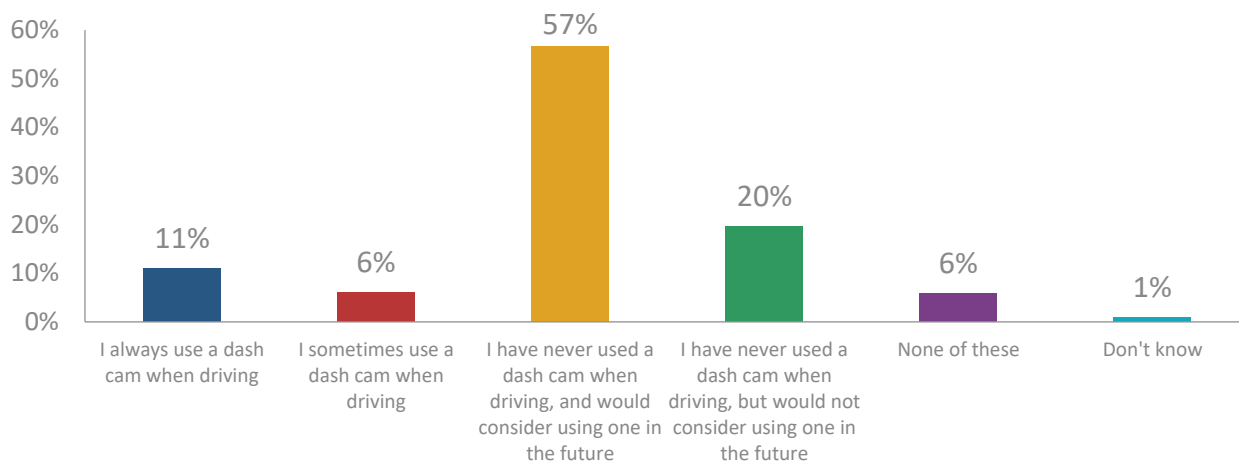
¹ Please be aware that YouGov is an online research agency and all of our respondents are regular Internet users.

² Although our total 'panel' of respondents is not an exact representation of the British public, it does contain enough people in each major demographic group to draw samples that do represent the population as a whole. This is because:

- our pool is sufficiently large to capture Britain's diversity;
- the company's recruitment strategy seeks to maximise the chances of obtaining a broadly-based panel; and
- ~~the internet itself has now reached all parts of British society.~~

Key Findings

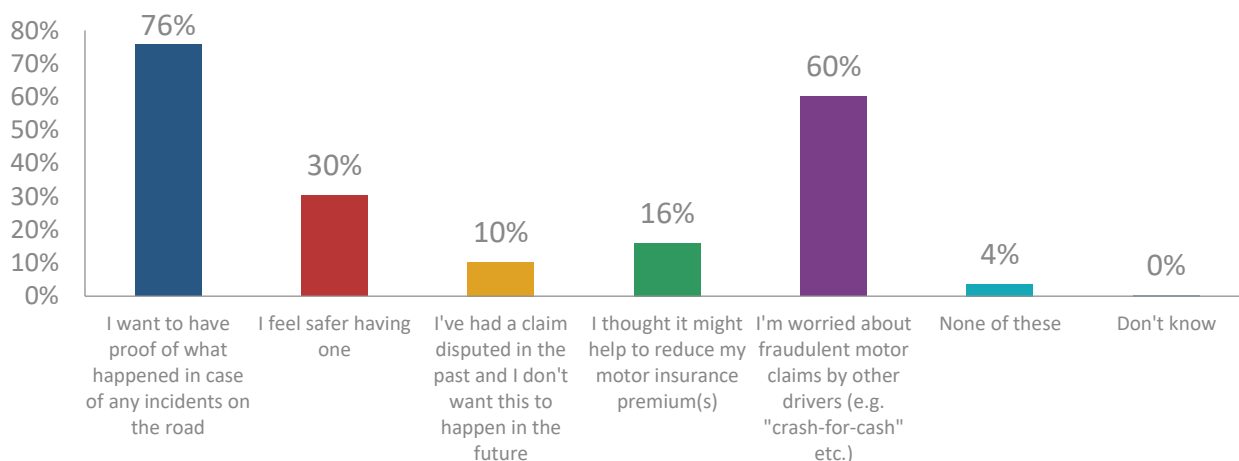
Dash cams



Above: Chart 1 - “For the following question, by “dash cam”, we mean a camera which is mounted on the windscreen or dashboard of a vehicle to record a view of the road through the windscreen. Which ONE, if any, of the following best applies to you? (Please select the option that best applies)” (Base: 1476 All GB Adults who drive)

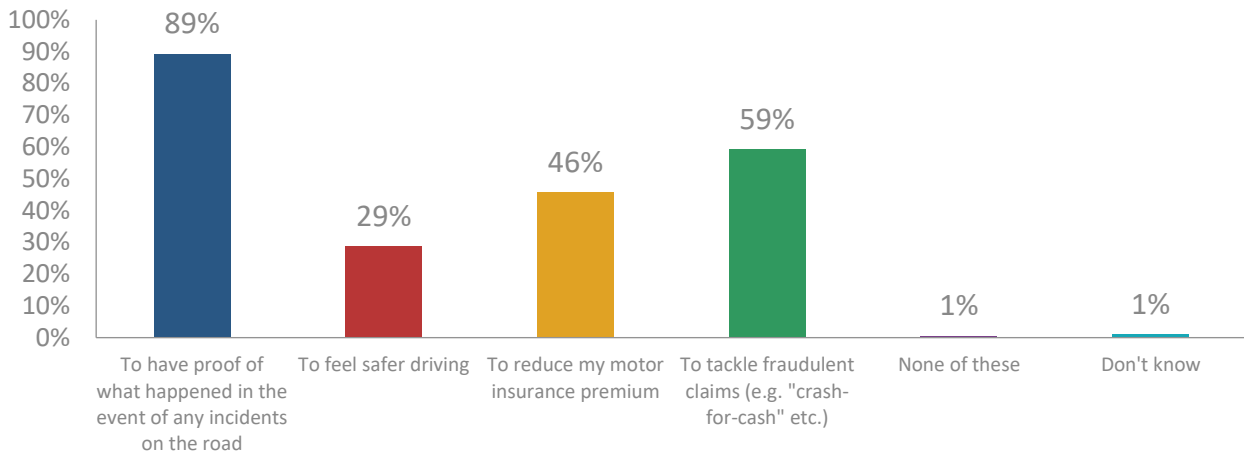
Only 18% of respondents currently use a dashcam at least sometimes (11% always, 6% sometimes). Furthermore, 20% of respondents don’t use one and would also not consider using one in the future.

- When we look specifically at gender amongst the people who either always or sometimes use a dashcam, men as twice as likely to use a dashcam 15% of men always do compare to 7% of women.



Above: Chart 2 - “You previously said that you use a dash cam when you drive. Which, if any, of the following are reasons for this? (Please select all that apply)” (Base: 251 All GB Adults who drive and use a dash-cam)

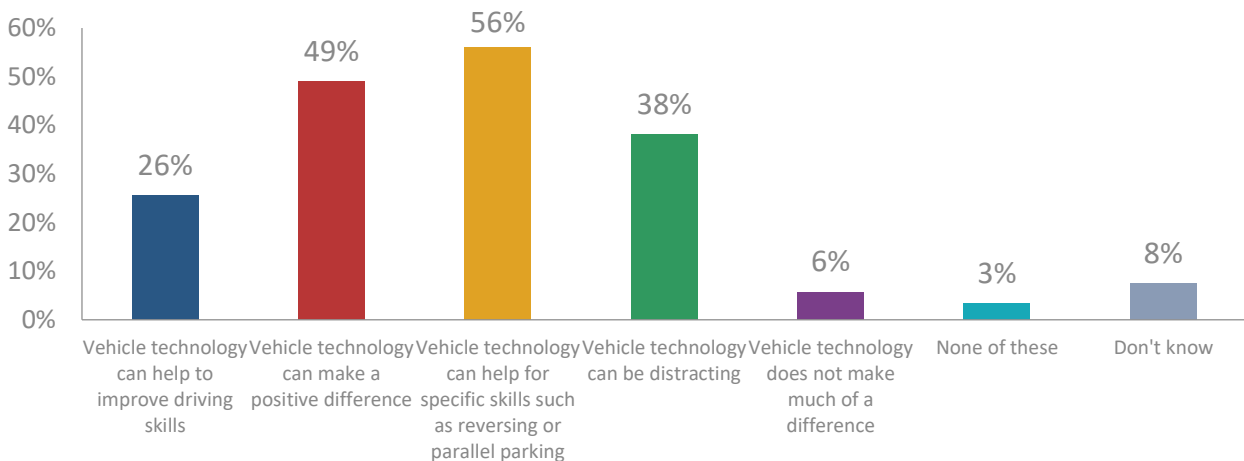
Of the respondents who said they use a dashcam, the main reason that they are used is because “I want to have proof of what happened in case of any incidents on the road” with 76% of respondents saying that is one of the reason why they use one. This is closely followed by worry about fraudulent claims by other driver with 60%.



Above: Chart 3 - "You previously said that you don't use a dash cam when you drive, but would consider using one in the future. Which, if any, of the following are reasons for why you would consider using one in the future? (Please select all that apply)" (Base: 837 All GB Adults who drive and do not use a dash-cam)

When asked why, drivers who don't currently use a dash cam why they may do in the future the answer was again overwhelmingly "To have proof of what happened in the event of any incidents on the road" The second most popular answer again similar to the reasons why drivers have dashcams and that is "To tackle fraudulent claims (e.g. "crash-for-cash" etc.) with 59%.

Vehicle Technology

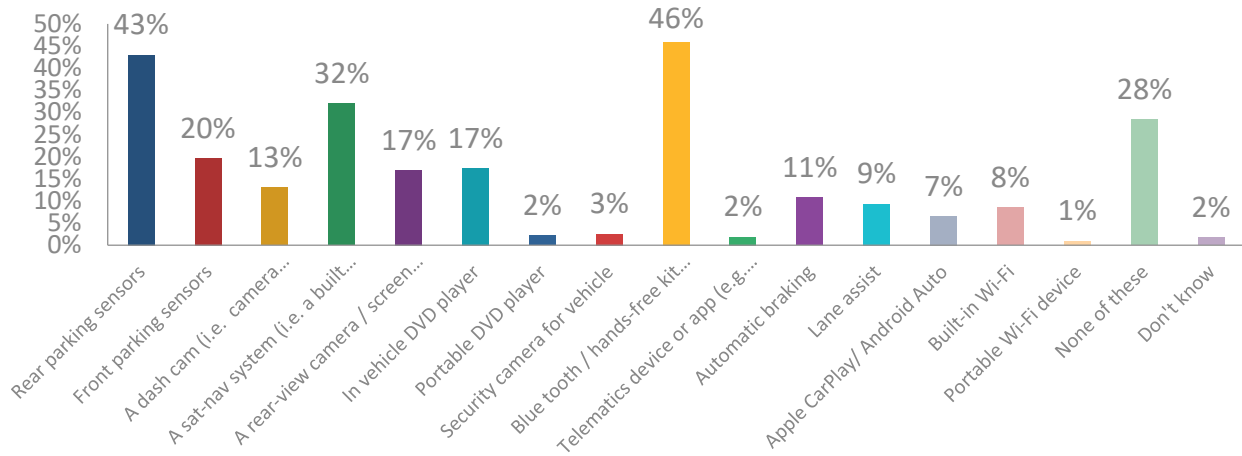


Above: Chart 4 - "For the following question, by "vehicle technology" we mean devices which come as standard in a vehicle or can be built-in or devices which are separate from the vehicle. Which, if any, of the following statements do you agree with? (Please select all that apply)" (Base: 1476 Base: All GB Adults online who drive)

Over half of respondents 56% agree that "Vehicle technology can help for specific skills such as reversing or parallel parking" whilst 49% feel that "Vehicle technology can make a positive difference". Conversely, 6% of respondents agree that "Vehicle technology does not make much of a difference"

- When we look at the demographic breakdown of the statement "Vehicle technology can help to improve driving skills" the difference between the 18-24 and 45-54 is 17% with 39% of 18-24 respondents compared to 21% of 45-54s.

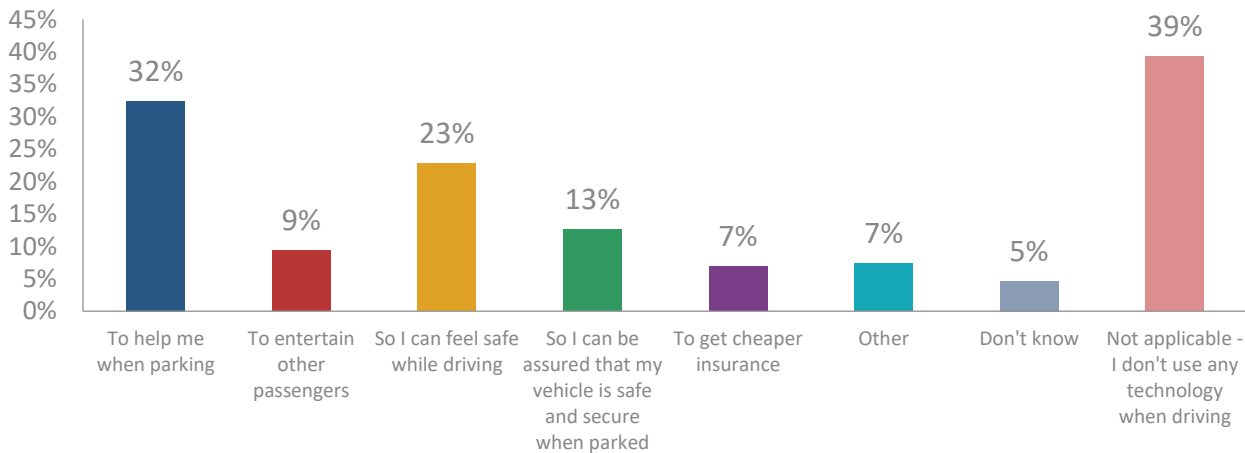
Technology in Vehicle



Above: Chart 5 - “As a reminder, by “vehicle technology” we mean devices which come as standard in a vehicle or can be built-in or devices which are separate from the vehicle. Which, if any, of the following vehicle technology devices do you currently have in your vehicle? (Please select all that apply)” (Base: 1476 Base: All GB Adults online who drive)

The most common type of technology that respondents reported that they had in their car was “Blue tooth / hands-free kit for mobile phone” with 46% of respondents saying this. The next most common was “Rear parking sensors” with 43% of respondents saying they have them.

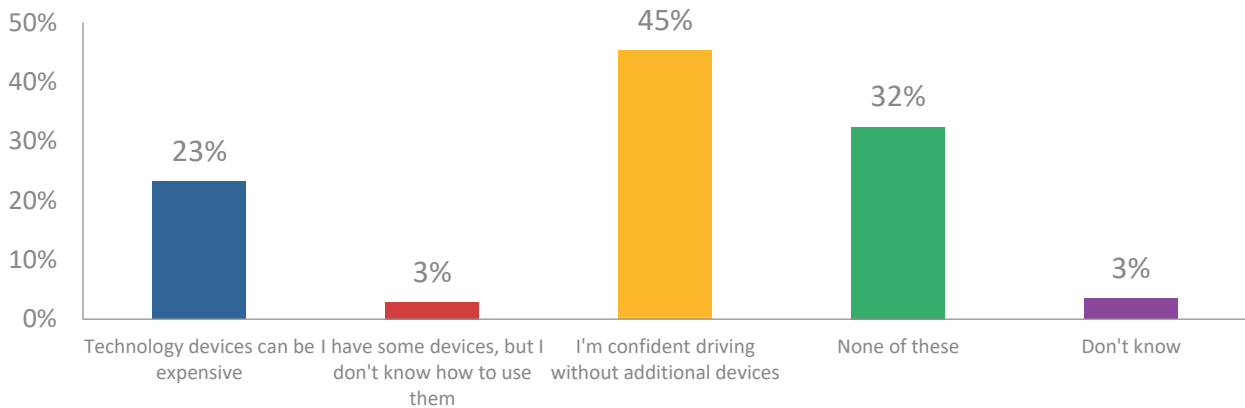
Reasons for using technology



Above: Chart 6 - “Which, if any, of the following are your reasons for using vehicle technology when driving? (Please select all that apply. If you don't use any technology when driving, please select the “Not applicable” option)” (Base: 1476 Base: All GB Adults online who drive)

The main reason that drivers use vehicle technology is “To help me when parking” with 32% of respondents giving this answer. While the second most common reason for wanting to use technology is “So I can feel safe while driving” with 23% responding this way.

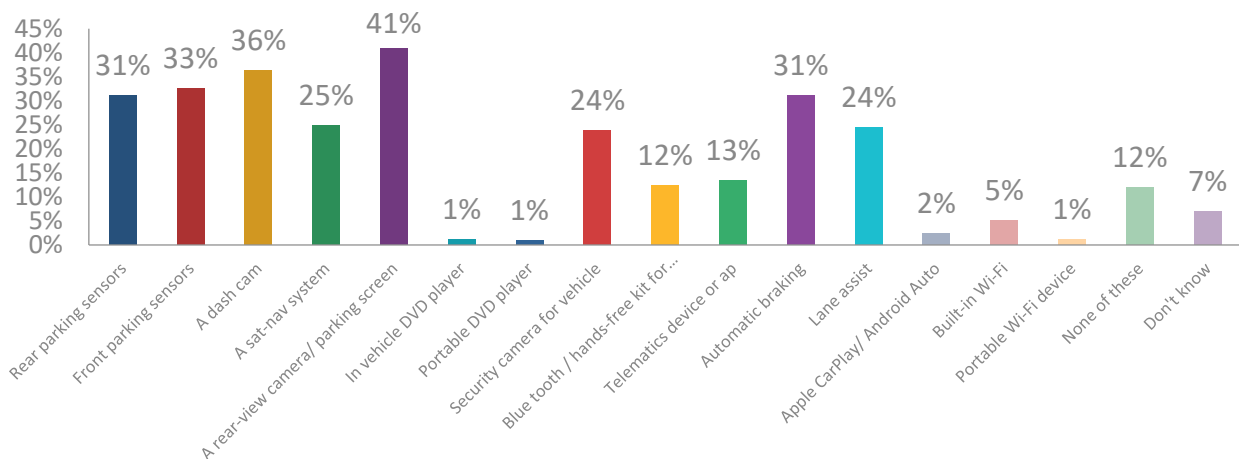
Reason for not using Vehicle technology



Above: Chart 7 - “You previously said that you don't use any vehicle technology devices when driving... Which, if any, of the following are reasons for this? (Please select all that apply)” (Base: 580 Base: Base: All GB Adults who drive and do not use vehicle technology)

The main reason that drivers do not use any vehicle technology when they are driving is because they “confident driving without additional devices” with 45% of respondents giving this answer. Secondary to this is that driver also feel that vehicle technology is expensive with 23% of respondents saying this.

Safety Devices while driving

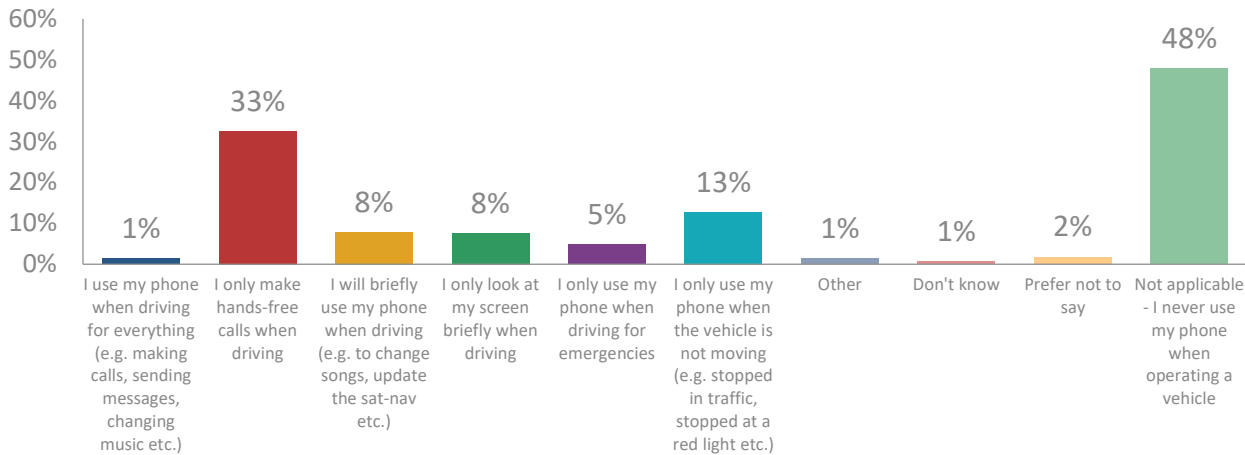


Above: Chart 8 - “Which, if any, of the following are your reasons for using vehicle technology when driving? (Please select all that apply. If you don't use any technology when driving, please select the “Not applicable” option)” (Base: 1476 Base: All GB Adults online who drive)

GB drivers think that the most important piece of technology when it come to their safety while driving is a “A rear-view camera / screen for parking”, 41% of respondents thinking this. Second is “a dash cam” 36% and third is “automatic breaking” with 31%.

- When looking at automatic breaking amongst ages groups 18-24s are nearly twice as likely (44%) than older age groups to think that automatic breaks are important (55+s - 26%).

Use of phone while driving

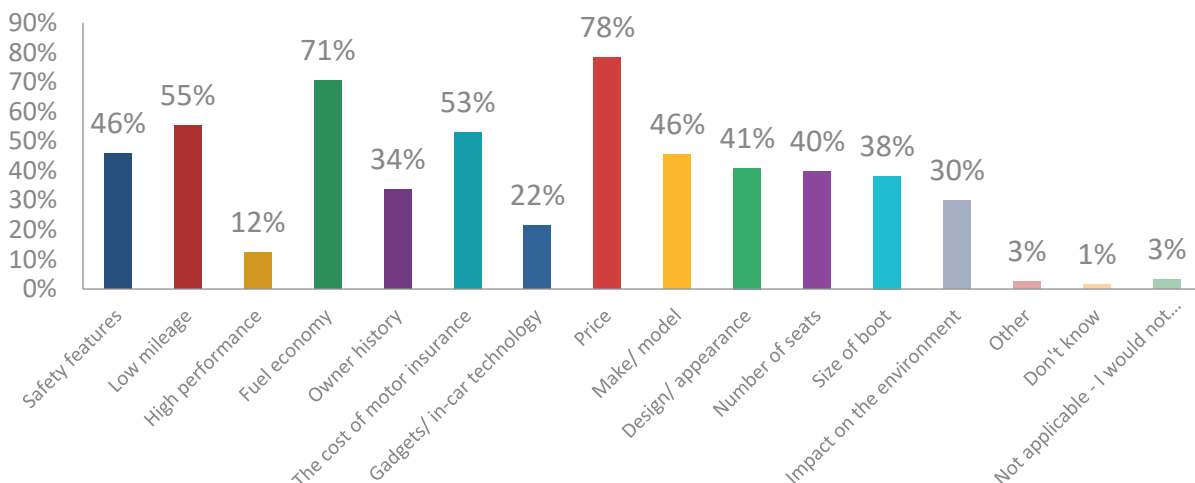


Above: Chart 9 - “Which, if any, of the following apply to you when driving? (Please select all that apply. If you would rather not share your experiences, please select the “Prefer not to say” option. If you never use your phone while driving, please select the “Not applicable option”) (Base: 1476 All GB adults who drive)

When asked about mobile phone use while driving, the most common answer given was that that the respondent “never” used their phone while driving, 48% of respondents said this. A further 33% said that they only use their phone for hands free calls while driving. A further 13% of respondents admit to using their phone while the vehicle is stopped despite it being illegal.

- When looking at age groups 7% of 18-24 year olds admit to using their phone while driving for everything whereas only 27% of 18-24 say they never use their phone for anything.

Top priorities when choosing a new vehicle

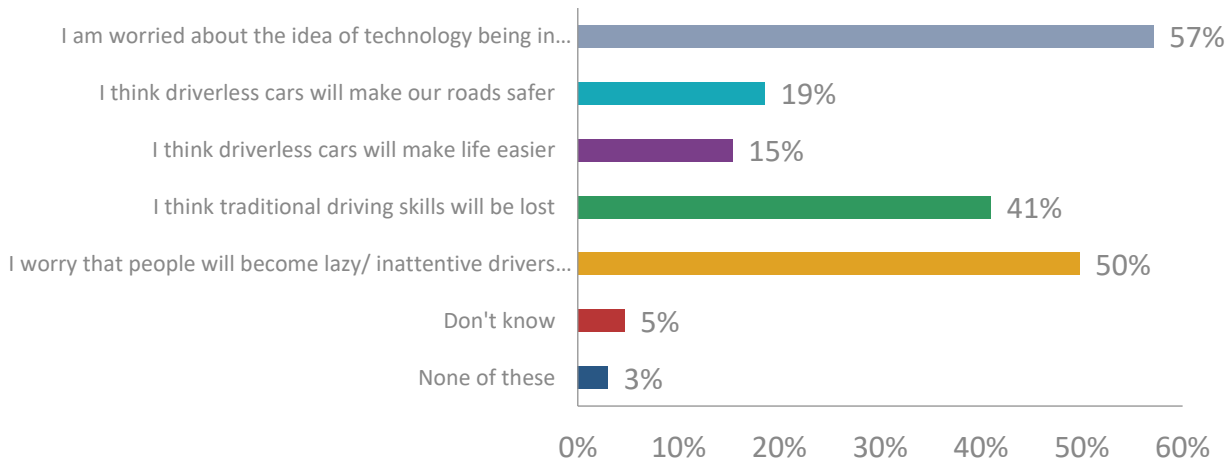


Above: Chart 10 - “For the following question, please imagine that you were looking to buy a new vehicle... Which, if any, would be your priorities when purchasing? (Please select all that apply. If you would not have any priorities when choosing a new vehicle, please select the “Not applicable” option)” (Base: 1476 All GB adults who drive)

Over three quarters (78%) of respondents said that ‘price’ would be a priority for them when purchasing a new vehicle. Followed by ‘fuel economy’ (71%), ‘Low mileage’ (55%) and ‘The cost of motor insurance’ (53%).

- When broken down by gender, men are more likely to say that ‘Make/model’ (52%) and ‘Design/appearance’ (45%) are priorities compared to only 39% and 36% of women.

Feelings about driverless cars

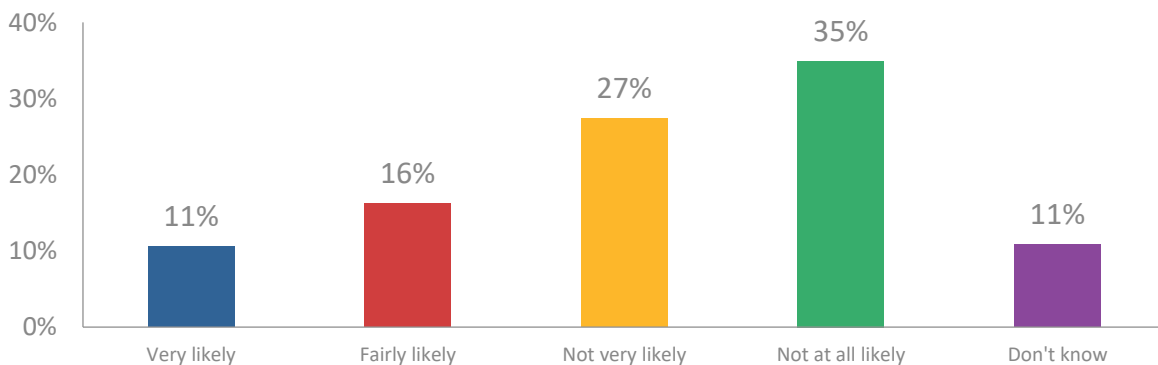


Above: Chart 11 - “For the following question, by “driverless car”, we mean a self-driving car that is capable of sensing its environment and moving with little or no human input. Which, if any, of the following describes how you feel about the concept of driverless cars? (Please select all that apply)” (Base: 1476 All GB adults who drive)

Over half of respondents (57%) said that they were ‘worried about the idea of technology being in control rather than the driver’. Whilst only 19% thought that ‘driverless cars will make our roads safer (e.g. the number of road collisions will be reduced’.

- 18-24 year olds are much more likely to think that ‘driverless cars will make life easier (e.g. have extra time to do other things’ (33%), compared to only 9% of 55+.

Yes/ no use a driverless car

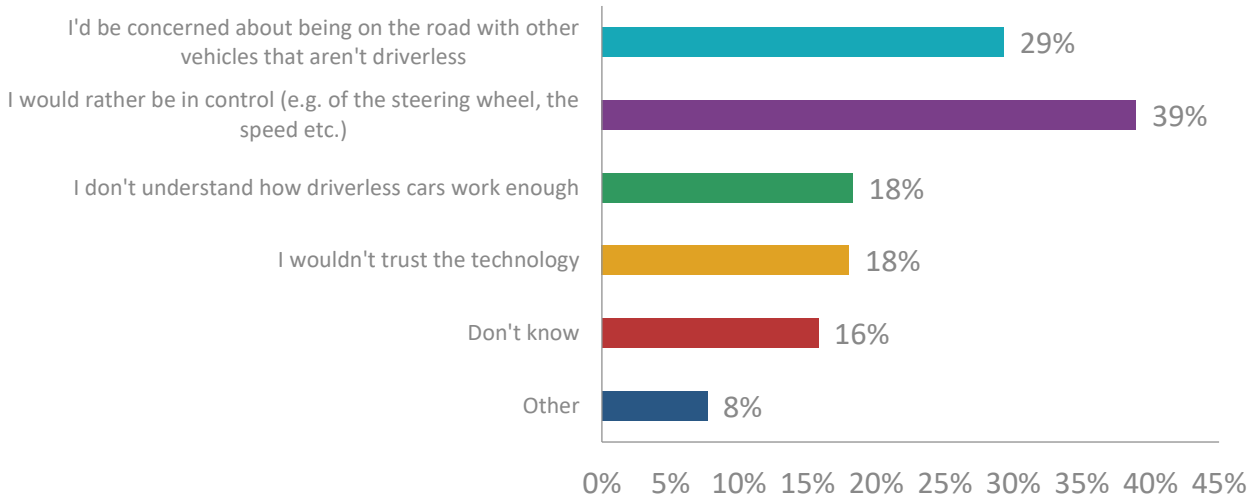


Above: Chart 12 - “As a reminder, by “driverless car”, we mean a self-driving car that is capable of sensing its environment and moving with little or no human input. How likely, if at all, would you be to ever travel in a driverless car (i.e. being a passenger)? (Please select the option which best applies)” (Base: 1476 All GB adults who drive)

27% of respondents would be likely to travel in a driverless car, with 11% being very likely and 16% being fairly likely. Conversely, 62% of respondents say they would be unlikely to use a driverless car in the future.

- Looking at the difference between men and women, 36% of men are likely to travel in a driverless car, compared to only 17% of women.

Reasons for not using a driverless car

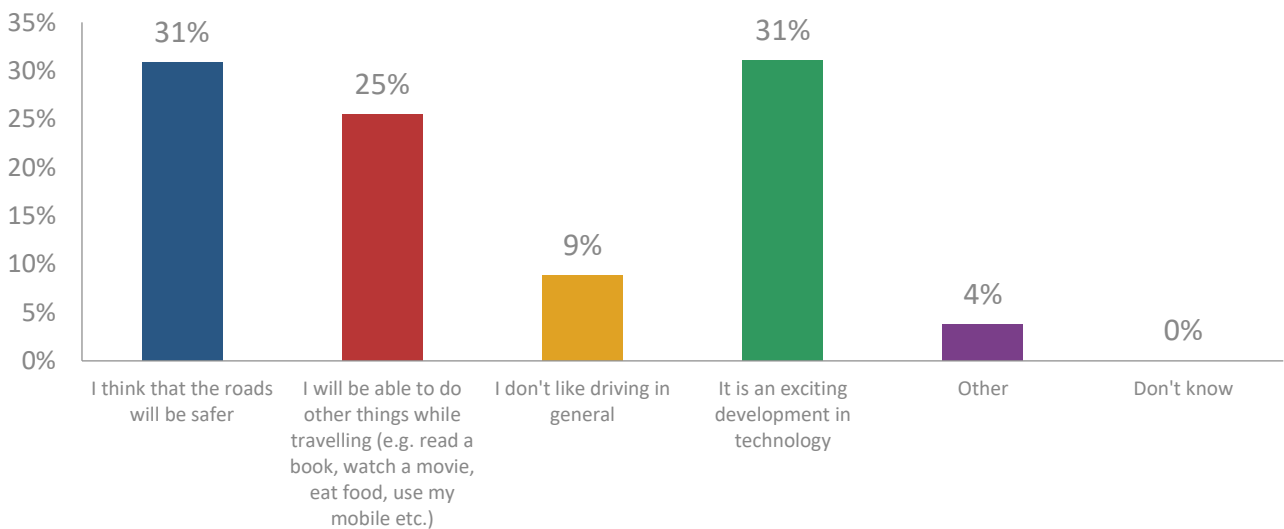


Above: Chart 13 - "You previously said that you would not travel in a driverless car (i.e being a passenger). Which, if any, of the following are reasons for this? (Please select all that apply)" (Base: 240 All GB adults who drive and would not travel in a driverless car)

39% of respondents said they would not travel in a driverless car because they 'would rather be in control (e.g. steering the wheel, the speed etc.). Whilst 29% said, they would be 'concerned about being on the road with other vehicles that aren't driverless.

- Interestingly, 26% of women said that they would not travel in a driverless car because they 'don't understand how driverless cars work enough' compared to only 13% on men.

Reasons for using a driverless car

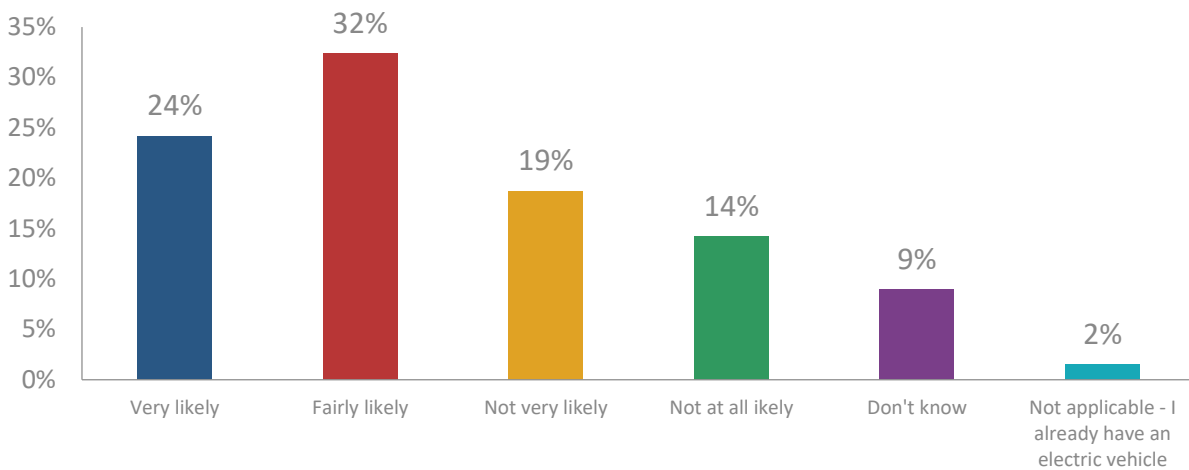


Above: Chart 14 - “You previously said that you would travel a driverless car (i.e. being a passenger). Which, if any, of the following are reasons for this? (Please select all that apply)” (Base: 156 All GB Adults who drive and would travel in a driverless car)

31% of respondents said that their reason for travelling in a driverless car is that they think ‘that the roads will be safer’ and ‘it’s an exciting development in technology’. Whilst only 9% said that it was because they ‘don’t like driving in general’

- Looking at the results based on gender, a fifth of women (20%) said their reason for travelling in a driverless car was because they ‘don’t like driving in general’, compared to only 5% of men.

Consider buying an electric vehicle

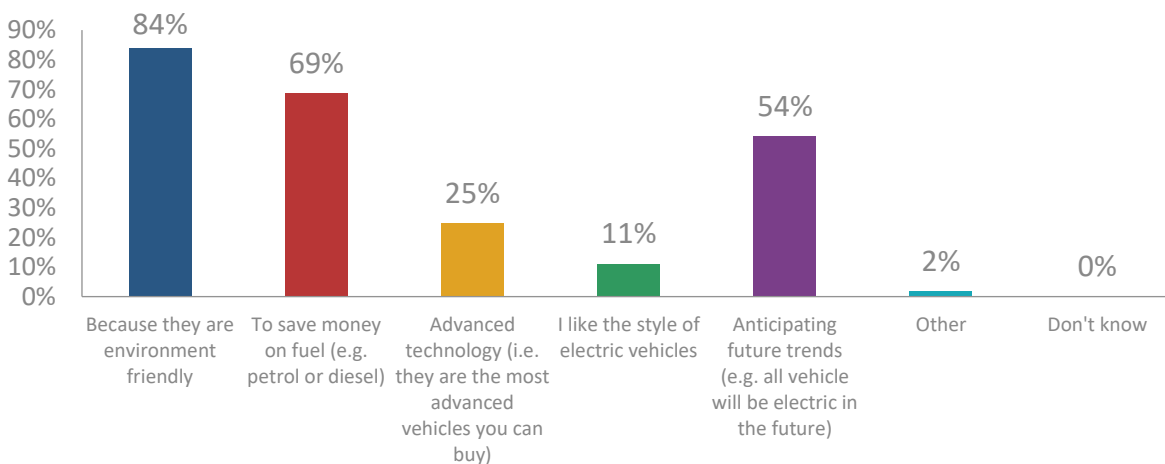


Above: Chart 15 - “For the following question, by “electric vehicle (EV)”, we mean a vehicle which is powered by energy stored in its rechargeable batteries, which are recharged by common household electricity. How likely, if at all, would you be to ever consider purchasing an electric vehicle (EV), if it was available at a price you would consider reasonable? (Please select the option that best applies. If you already have an electric vehicle (EV), please select the “Not applicable” option)” (Base: 1476 All GB Adults who drive)

57% of respondents would be likely to consider purchasing an electric vehicle if it was available to them at a price they would consider reasonable. With, 32% of respondents being fairly likely and 24% very likely.

- When looking at the results by age, 18-24 year olds are much more likely to purchase an electric vehicle (73%), than 55+ (51%).

Reasons for buying an electric vehicle

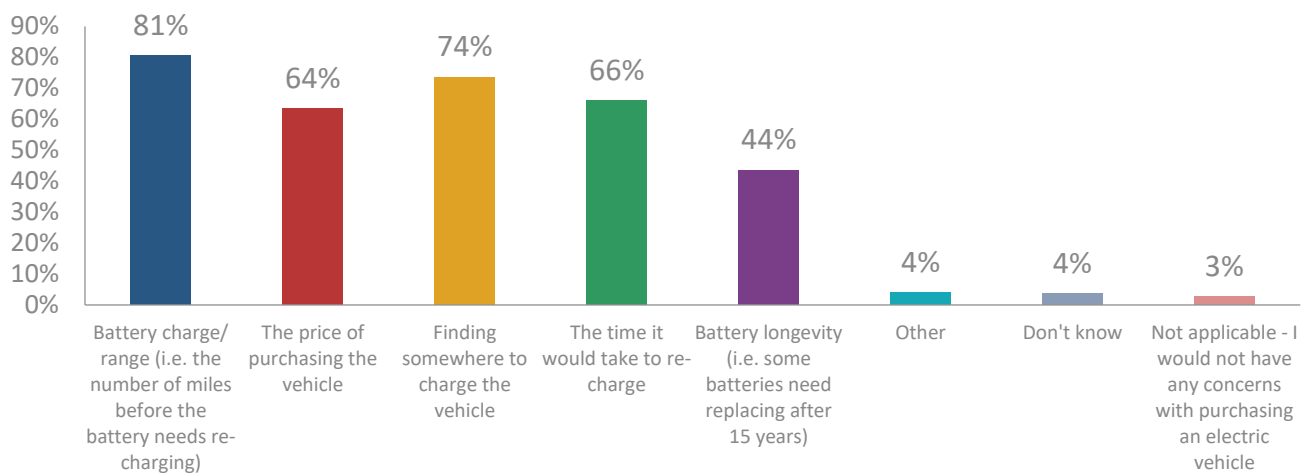


Above: Chart 16 - “You previously said that you would consider purchasing an electric vehicle (EV), if it was available at a price you would consider reasonable. Which, if any, of the following are reasons for this? (Please select all that apply)” (Base: 357 All GB Adults who drive and would consider buying an electric vehicle)

The majority of respondents (84%) said that the reason they would consider purchasing an electric vehicle is because ‘they are environment friendly’, followed by ‘to save money on fuel’ (69%) and ‘Anticipating future trends’ (54%).

- Women are more likely to buy consider buying an electronic vehicle because ‘they are environment friendly’ (92%) than men (78%). Whilst men are more likely to consider buying an electronic vehicle because of ‘Advanced technology’ (32%), than women (14%).

Concerns buying an electric vehicle

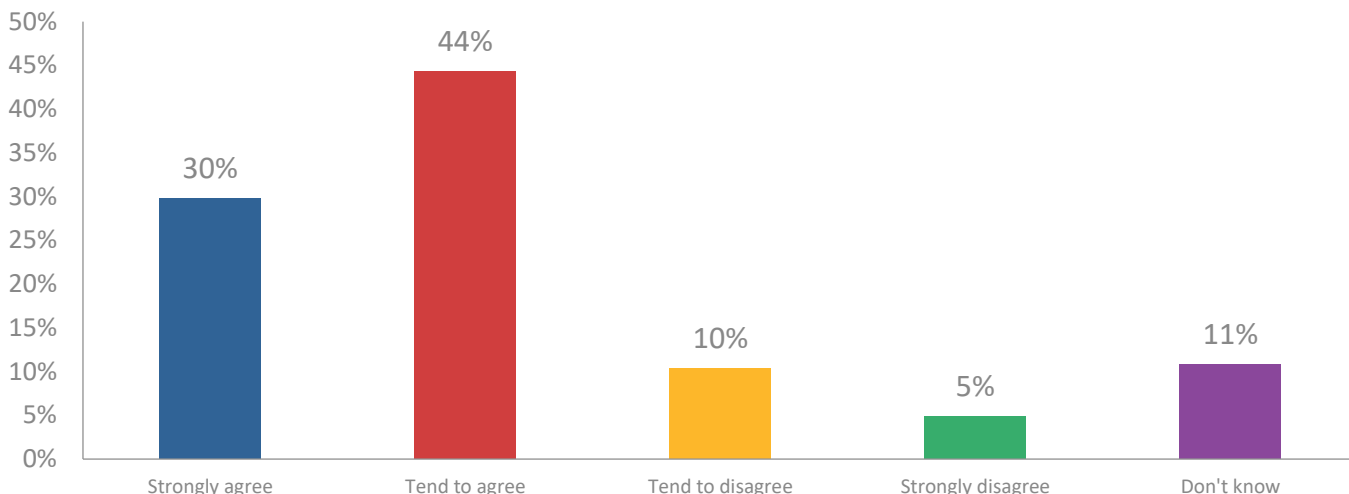


Above: Chart 17 - “Which, if any, of the following concerns would you have about purchasing an electric vehicle? (Please select all that apply. If you would not have any concerns about purchasing an electric vehicle, please select the “Not applicable” option).” (Base: 1476 All GB Adults who drive)

The majority of respondents (81%) would be concerned about ‘battery charge/ range’ when purchasing an electric vehicle. Followed by, ‘finding somewhere to charge the vehicle’ (74%), ‘the time it would take to re-charge’ (66%) and ‘the price of purchasing the vehicle’ (64%).

- Londoners are the least concerned about ‘finding somewhere to charge the vehicle’ (62%). Whilst respondents in Scotland are most concerned (83%).

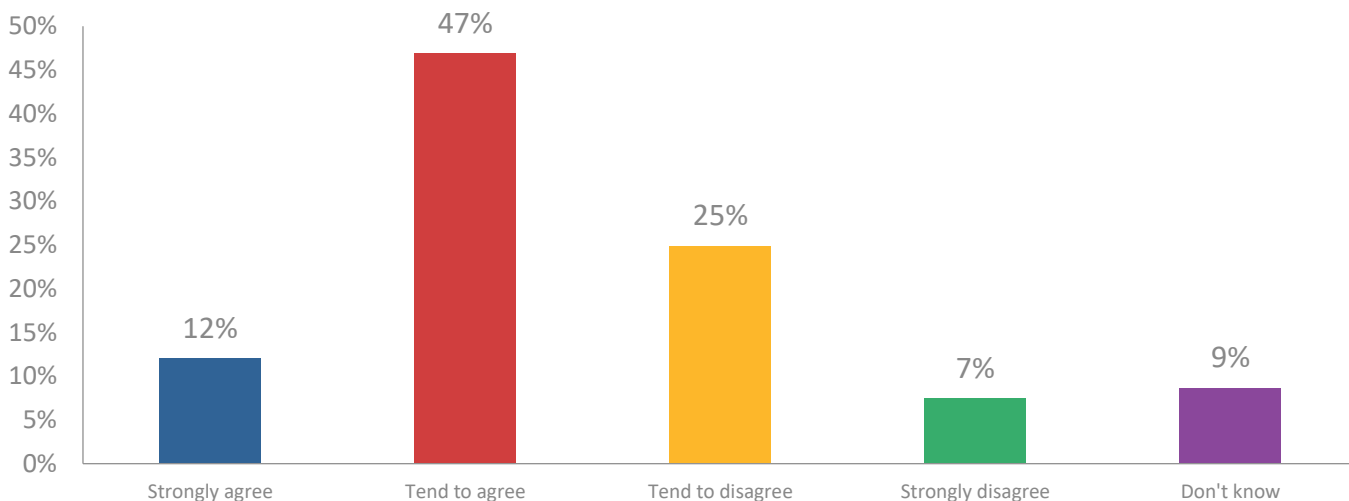
Agree electric vehicle are more environmentally friendly



Above: Chart 18 - “To what extent, if at all, do you agree or disagree with the following statement? Electric vehicles (EV) are more environmentally friendly than petrol and diesel vehicles” (Base: 1476 All GB Adults who drive)

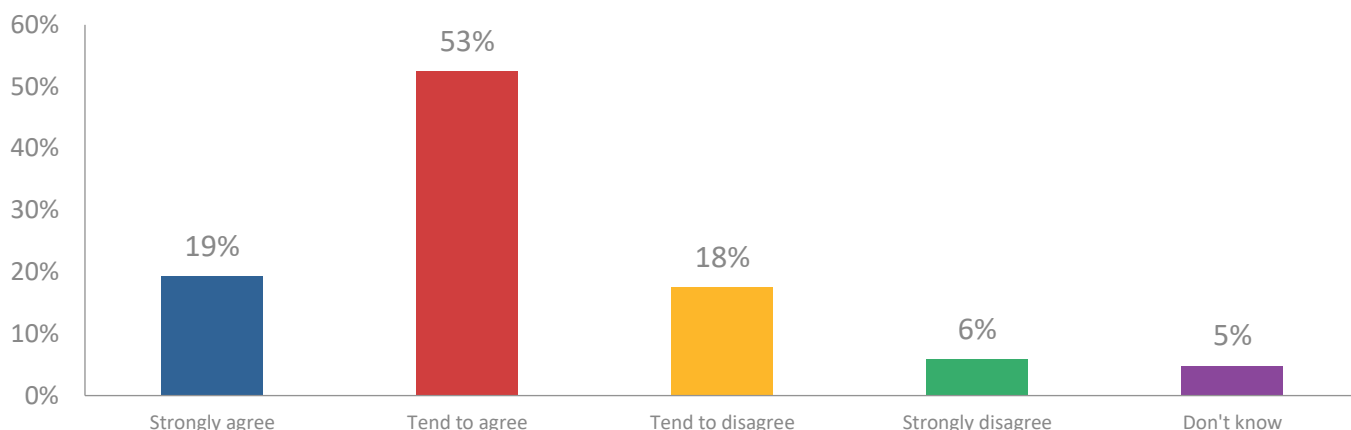
74% of respondents agreed that ‘Electric vehicles (EV) are more environmentally friendly than petrol and diesel vehicles’

Agree/ Disagree statements environment consciousness



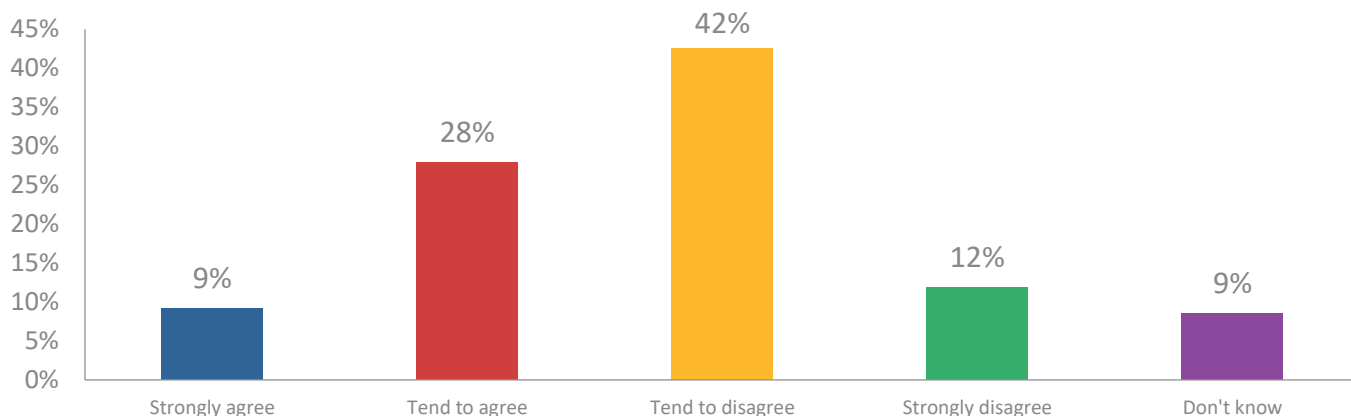
Above: Chart 19 - “For the following question, by “environmental consciousness”, we mean considering the health and well being of the environment (i.e. avoiding doing things which have the potential to harm the environment). To what extent, if at all, do you agree or disagree with the following statement? - Environmental consciousness is a concern for me when purchasing a vehicle (e.g. looking for eco-friendly vehicles etc.)” (Base: 1476 All GB Adults who drive)

Over half of respondents (59%) agreed that Environmental consciousness is a concern for me when purchasing a vehicle (e.g. looking for eco-friendly vehicles etc.)



Above: Chart 20 - "For the following question, by "environmental consciousness", we mean considering the health and well being of the environment (i.e. avoiding doing things which have the potential to harm the environment). To what extent, if at all, do you agree or disagree with the following statement? - Environmental consciousness is a concern for me when purchasing household products (e.g. purchasing reusable products, compostable bin bags, recycled products etc.)" (Base: 1476 All GB Adults who drive)

The majority of respondents (72%) agreed that - Environmental consciousness is a concern for me when purchasing household products (e.g. purchasing reusable products, compostable bin bags, recycled products etc.)"



Above: Chart 21 - "For the following question, by "environmental consciousness", we mean considering the health and well being of the environment (i.e. avoiding doing things which have the potential to harm the environment). To what extent, if at all, do you agree or disagree with the following statement? - I consider the environment when travelling for long distances (e.g. flying etc.)" (Base: 1476 All GB Adults who drive)

Only 37% of respondents agreed that they consider the environment when travelling for long distances (e.g. flying etc.)

PR Editors Notes:

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2019 adults of which 1476 were driver. Fieldwork was undertaken between 1st - 6th March 2019. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).