

1 April 2025

EASTLINK'S SELF-DRIVING & ELECTRIC CAR SURVEY: TRENDS, PREFERENCES AND PERCEPTIONS

In late 2024, EastLink conducted its eighth Annual Victorian Self-Driving & Electric Car Survey, gathering insights from over 5,700 motorists who use Melbourne's EastLink. This comprehensive annual survey, the largest of its kind, sheds light on evolving vehicle power preferences, barriers to electric vehicle (EV) adoption, and perceptions of self-driving technology.

Summary of Key Findings

1. Vehicle Power Preferences:

- **Hybrid Electric:** a record high 51% of motorists now prefer hybrid electric for their next vehicle, up from 46% in the previous two years.
- **100% Electric:** Preference for fully electric vehicles has declined to 30%, continuing a downward trend from a peak of 42% two years ago.
- **Petrol and Diesel:** Preferences for petrol (31%) and diesel (15%) have remained steady, confirming the increase from their low points two years ago.

2. Barriers to Electric Vehicle Adoption:

- **Purchase Cost:** The primary barrier, though decreasing, remains the purchase cost (62%).
- **Charging Facilities:** 58% of motorists cite the lack of charging facilities away from home as a significant barrier.
- **Vehicle Range:** 52% are concerned about the range before recharging.

3. Government Incentives:

- 50% of motorists believe that government incentives are necessary to encourage electric vehicle adoption, with a preference for incentives that reduce the upfront purchase price and annual registration costs. This is significantly lower than the peak of 74% three years previously.

4. Driver Assist Functions:

- Usage of a wide range of driver assist functions is continuing to increase every year.
- The exceptions are active parking assistance and automatic lane changing,

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which are much less frequently used than other driver assist functions.

5. Self-Driving Vehicles:

- Following years of decline in desirability of self-driving technology across a wide range of use cases, this survey now indicates a small bounce upwards in desirability of self-driving technology for each use case.
- However, desirability remains well below 2017 levels across all of these use cases.
- Do these small upward bounces in desirability indicate that motorists' expectations are passing the Gartner Hype Cycle's "Trough of Disillusionment" and are now in transition towards the "Slope of Enlightenment" when it comes to self-driving vehicles?

6. Connected Cars:

- While there has been a small decline in desirability for vehicle connectivity over the past few years, a majority of motorists continue to desire connectivity for traffic warnings, road condition warnings, and vehicle security applications.

EastLink remains committed to supporting advancements in self-driving and electric vehicle technologies through its involvement with the Centre for Connected and Automated Transport (CCAT).

The survey results highlight the ongoing challenges and opportunities in bringing the public along on this journey towards a more sustainable and technologically advanced future.

The detailed survey results are attached (see overleaf).

For further information:

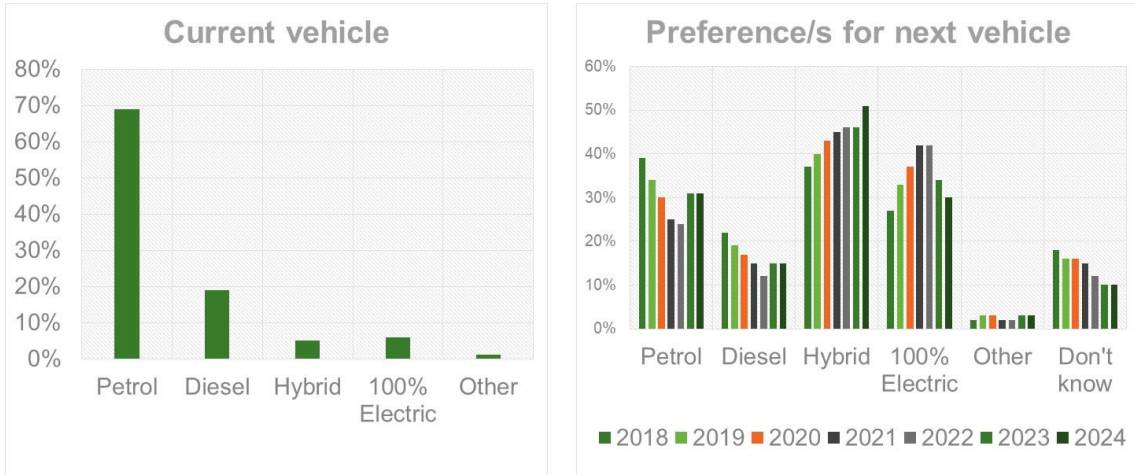
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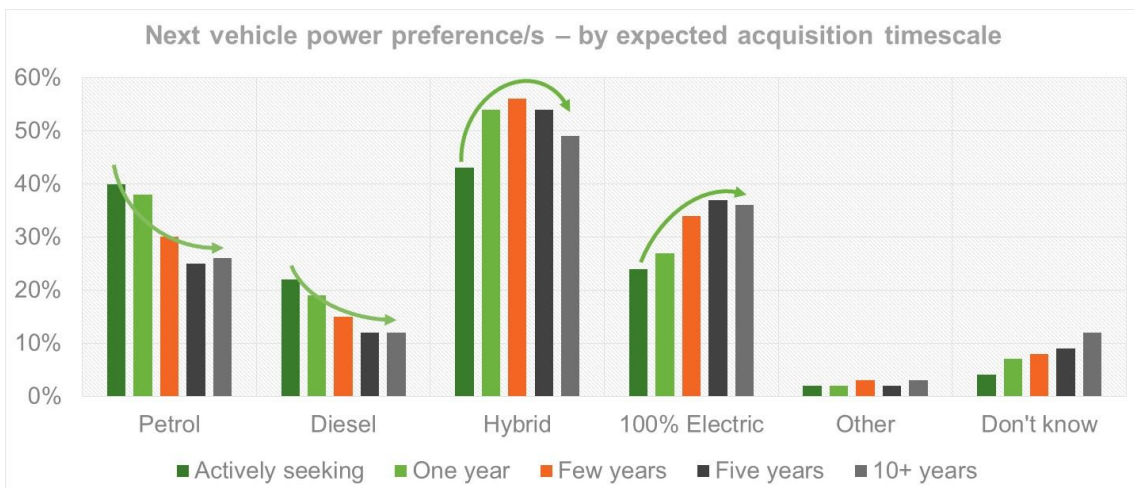
DETAILED SURVEY RESULTS

Vehicle power

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



- 51% of motorists now include hybrid electric in their power preferences for their next vehicle (up from 46% in the previous two years).
- However, just 30% of motorists now include 100% electric in their power preferences, which continues the decline in this power preference (from 42% two years ago and 34% last year).
- The preference for petrol has remained steady at 31% (above its low point of 24% two years ago), and the preference for diesel has also remained steady at 15% (above its low point of 12% two years ago).



- Hybrid continues to be the most popular power preference for motorists who expect to get

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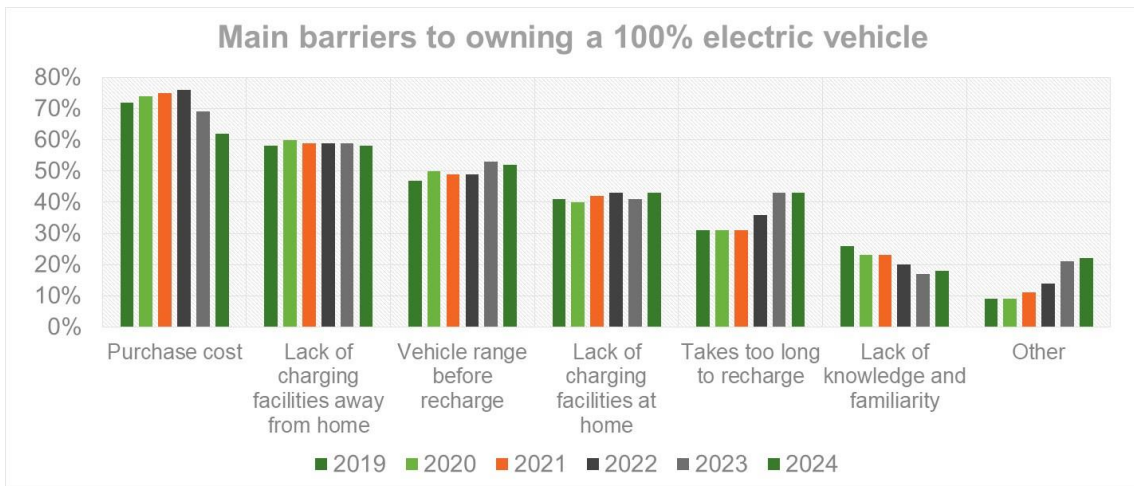
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their next vehicle within the next few years.

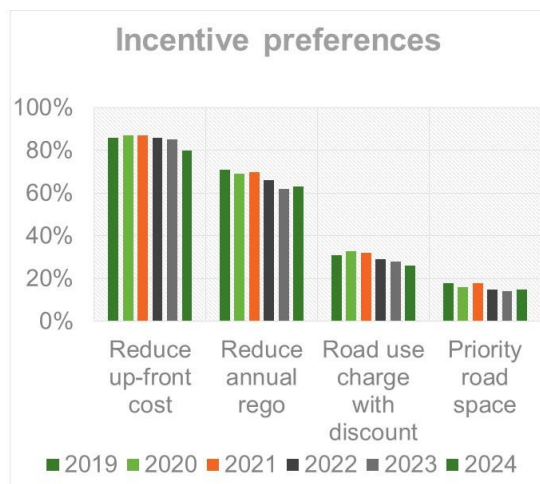
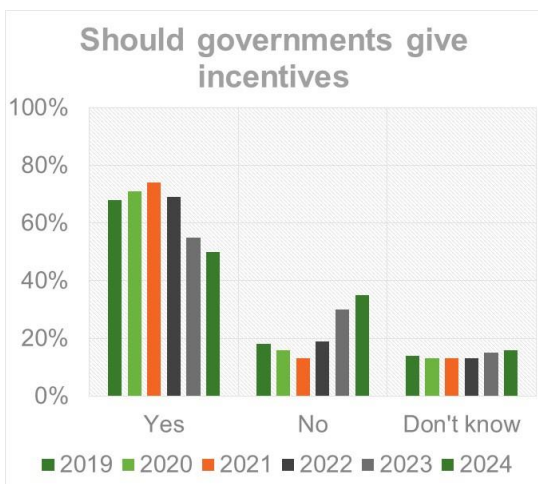
- Surveys until two years ago indicated that 100% electric was the most popular power preference for motorists who expect to get their next vehicle beyond 5 years.
- However, for the second successive year in this annual survey, the preference for hybrid continues to significantly exceed the preference for 100% electric for motorists who expect to get their next vehicle beyond 5 years.

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 (62%, down from 69% in the previous year and a peak of 76% two years ago), followed by the lack of charging facilities away from home (58%, unchanged since 2019), and then vehicle range before re-charging (52%, up from 47% since 2019).
- Price reductions for established electric vehicle models and the introduction of new models with even lower costs are continuing to reduce the purchase cost barrier.

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?



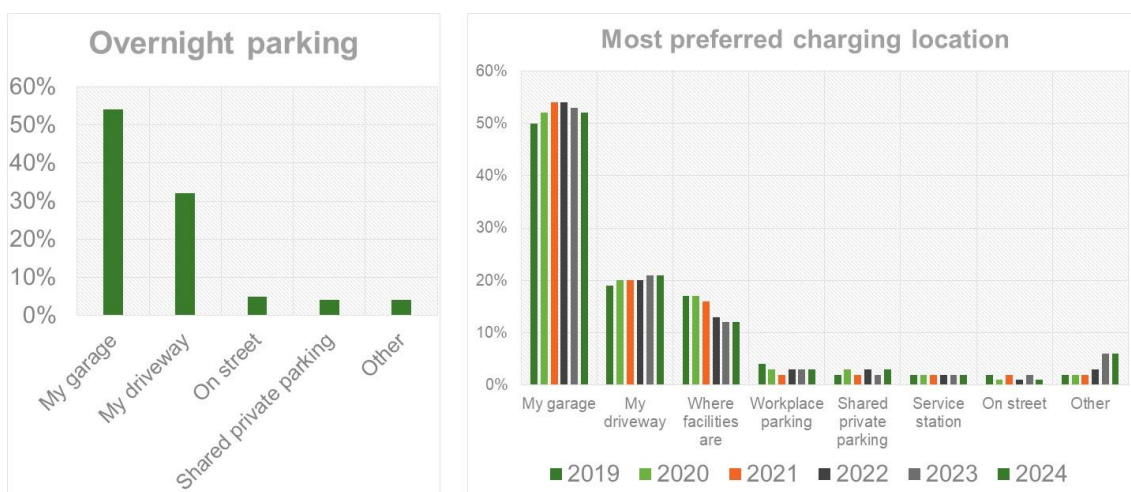
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- 50% of motorists now think that governments should provide incentives to encourage the take-up of electric vehicles, continuing the steady decline from the peak of 74% three years previously.
- Of those motorists who think government incentives should be provided, most want incentives that will reduce the up-front purchase price as well as reduce the cost of annual registration for electric vehicles.

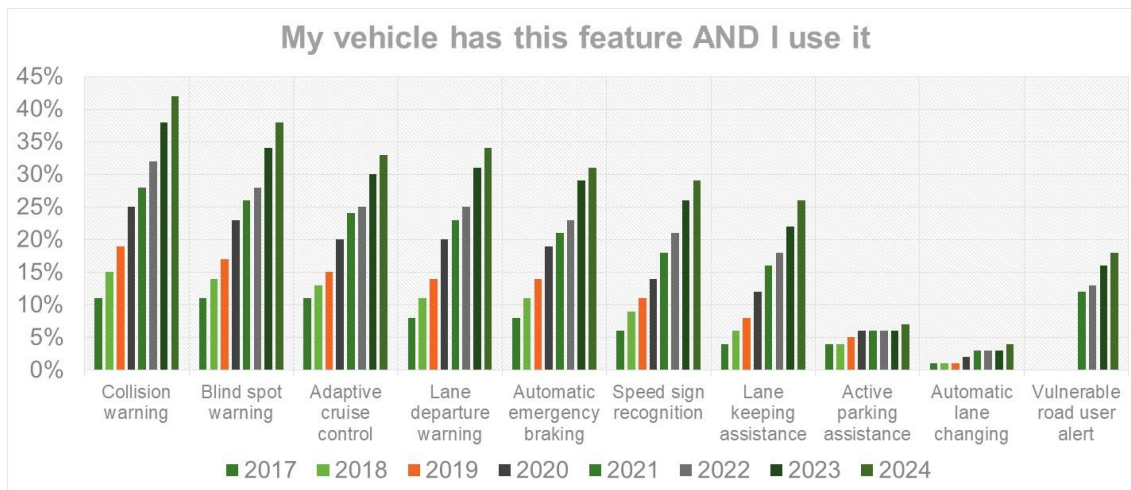
At home currently, where do you mostly park your car overnight when not in use? If you owned a 100% battery electric vehicle where would you most prefer to charge it?



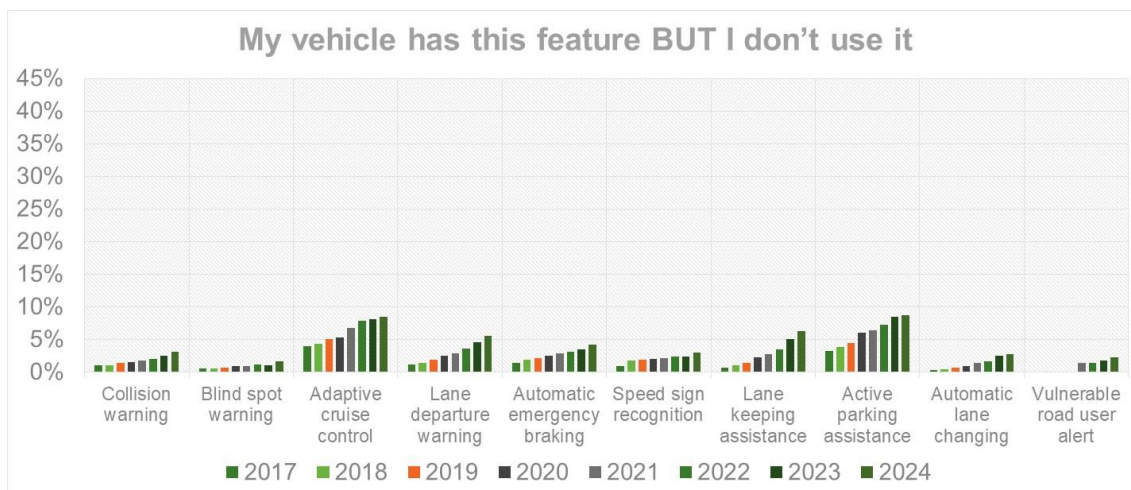
- 86% of motorists said they park their car overnight in their private garage or on their private driveway.
- 73% of motorists identified these two locations as their most preferred charging locations.
- This is similar to previous years.

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 only slowly increasing.



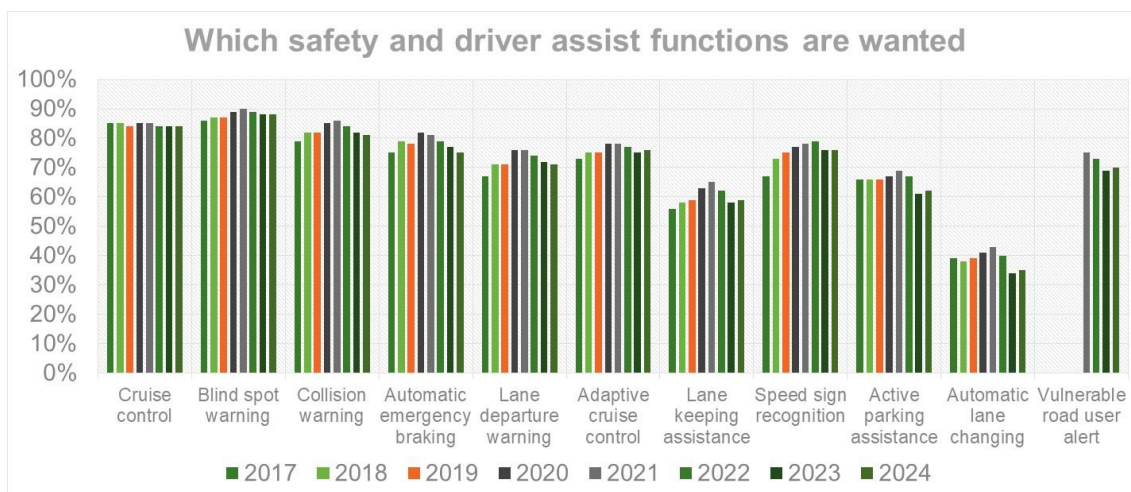
- Compared to other driver assist functions, active parking assist is much less likely to be used by motorists when these functions are available.
- It is the only driver assist function where the proportion of motorists with this feature who don't use it exceeds the proportion of motorists with this feature who do use it.

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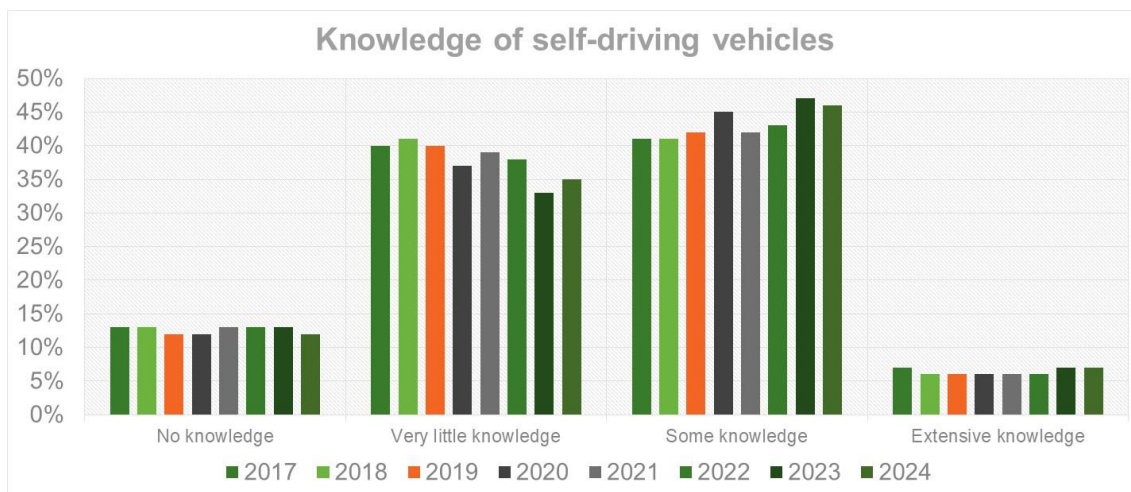
Which of the following automated functions would you want in your NEXT vehicle?



- Desirability of most driver assist functions was generally similar to the previous year, however slightly lower than their respective peaks a few years ago.
- The three least wanted features are the three driver assist features that involve steering of the vehicle: automatic lane changing, lane keeping assistance and active parking assistance.

Fully self-driving cars

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



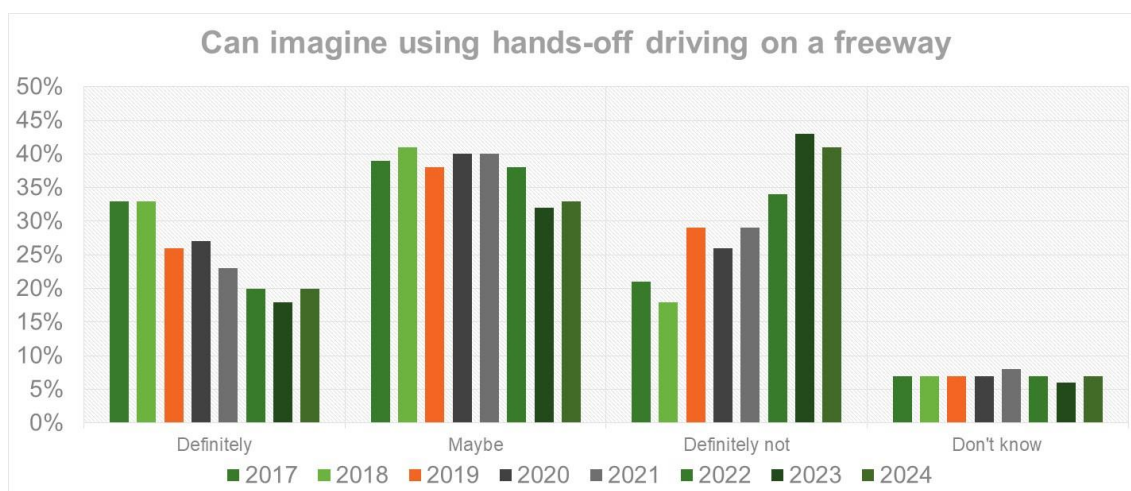
- Since 2017, the most significant change in motorists’ perceptions of their knowledge of self-driving cars has been a small shift of motorists over the past few years from “very little knowledge” to “some knowledge”.
- Almost half of motorists (47%) think they have “no knowledge” or “very little knowledge” of self-driving vehicles.

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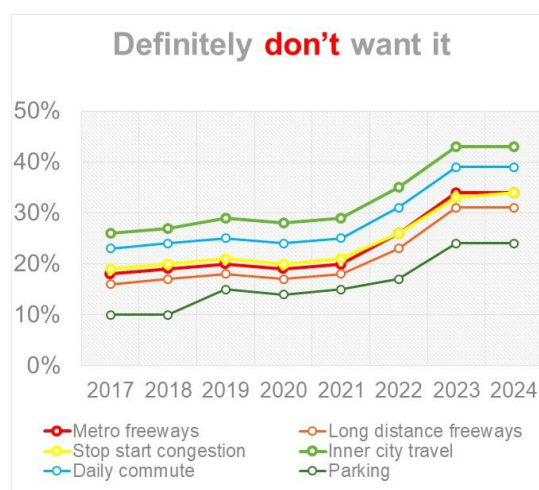
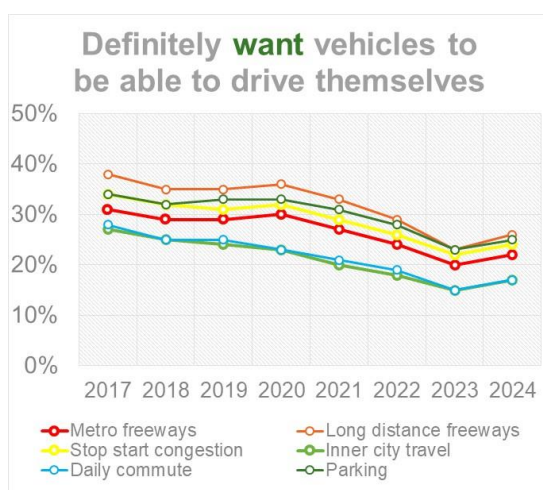


Could you imagine using hands-off driving on a freeway?



- The proportion of motorists who say they could “definitely” imagine using hands-off driving on a freeway has bounced up slightly following years of decline.
- Similarly, the proportion of motorists who say they could “definitely not” imagine it has reduced by the same amount.
- 20% can now “definitely” imagine it, compared to 41% who can “definitely not” imagine it.
- However, despite this upward bounce in those who could “definitely” imagine using hands-off driving on a freeway, the most recent data remains well below the 2017 survey, when 33% could “definitely” imagine it.

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



- The proportion of motorists who say they “definitely want” vehicles to be able drive themselves across a wide range of journey use cases has bounced up slightly following years of decline.
- However, despite this upward bounce, the most recent data remains well below 2017 data.

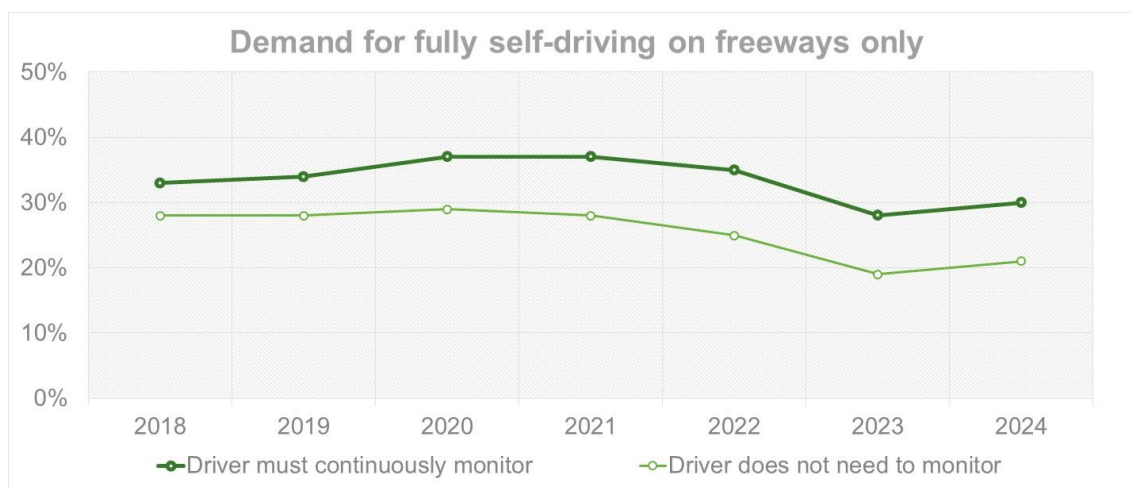
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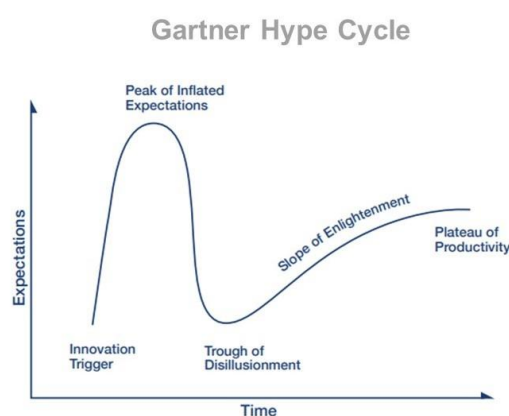
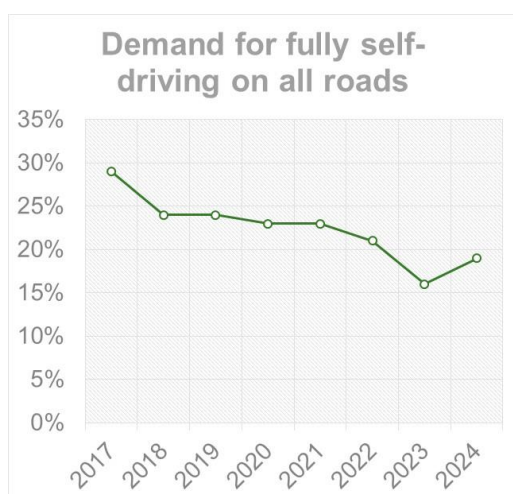
Would you want YOUR NEXT vehicle to offer fully self-driving on freeways, under each of these circumstances:

- 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 bounced up slightly following several years of decline.
- 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>

- The proportion of motorists who want their next vehicle to offer fully self-driving on all roads has bounced upwards following years of decline.
- 19% of motorists now want it, compared to 16% in the previous year.

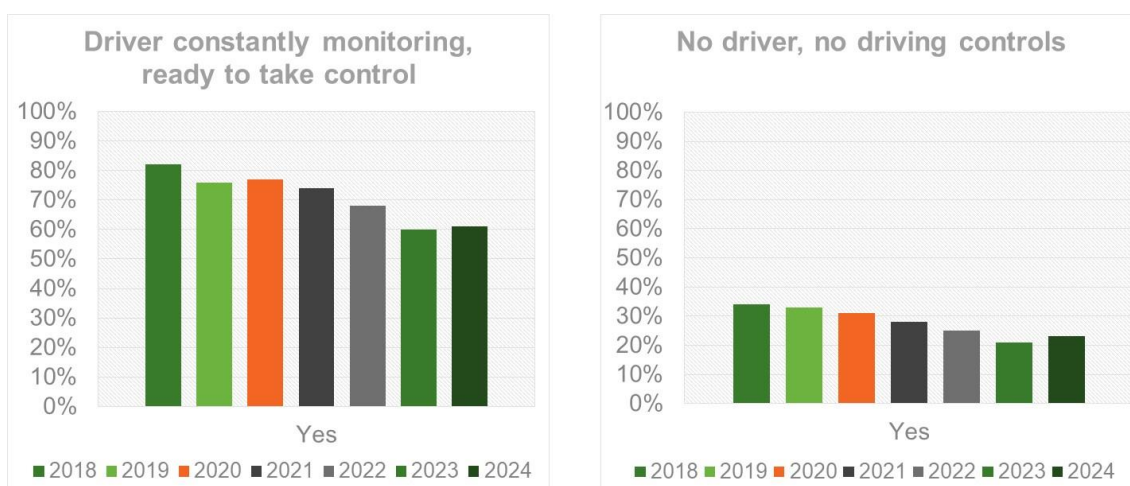
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- However this is still much lower than the 29% result from 2017.
- Together with the other results in the survey outlined above, do the small upward bounces indicate that motorists' expectations are passing Gartner's "Trough of Disillusionment" and in transition towards the "Slope of Enlightenment" when it comes to self-driving vehicles?
- Gartner explains parts of its Hype Cycle as follows:
 - **Trough of Disillusionment:** Interest wanes as experiments and implementations fail to deliver. Producers of the technology shake out or fail. Investments continue only if the surviving providers improve their products to the satisfaction of early adopters.
 - **Slope of Enlightenment:** More instances of how the technology can benefit the enterprise start to crystallize and become more widely understood. Second- and third-generation products appear from technology providers. More enterprises fund pilots; conservative companies remain cautious.
 - **Plateau of Productivity:** Mainstream adoption starts to take off. Criteria for assessing provider viability are more clearly defined. The technology's broad market applicability and relevance are clearly paying off.

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?



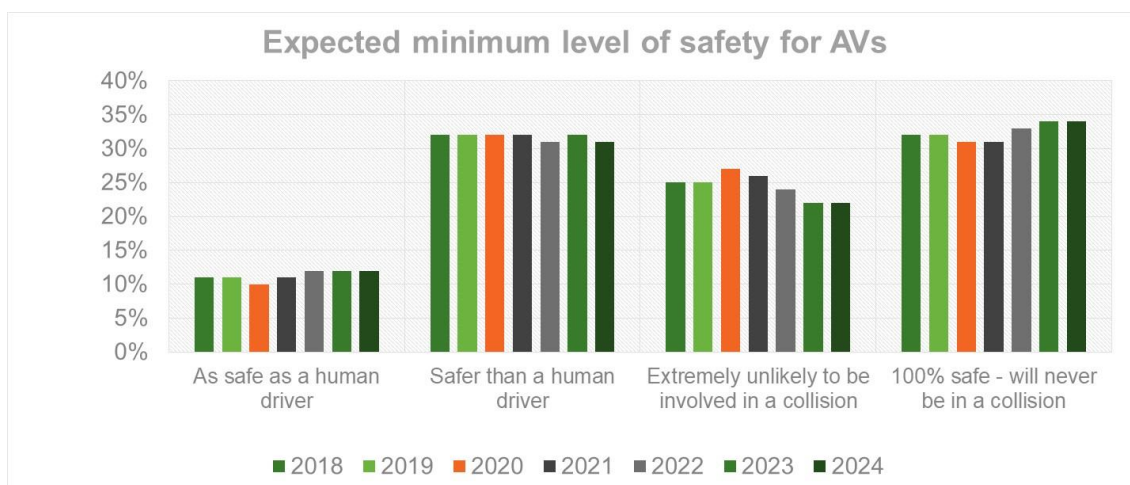
- The number of motorists who would travel as a passenger in a fully self-driving car on a freeway has bounced up slightly following years of decline.
- This is slight upward bounce is evident for both scenarios:
 - where the vehicle has a driver who is monitoring and able to take over control.
 - where the vehicle has a driver who is monitoring and able to take over control,
- While 61% 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 23% where the vehicle has no driver and no driving controls.

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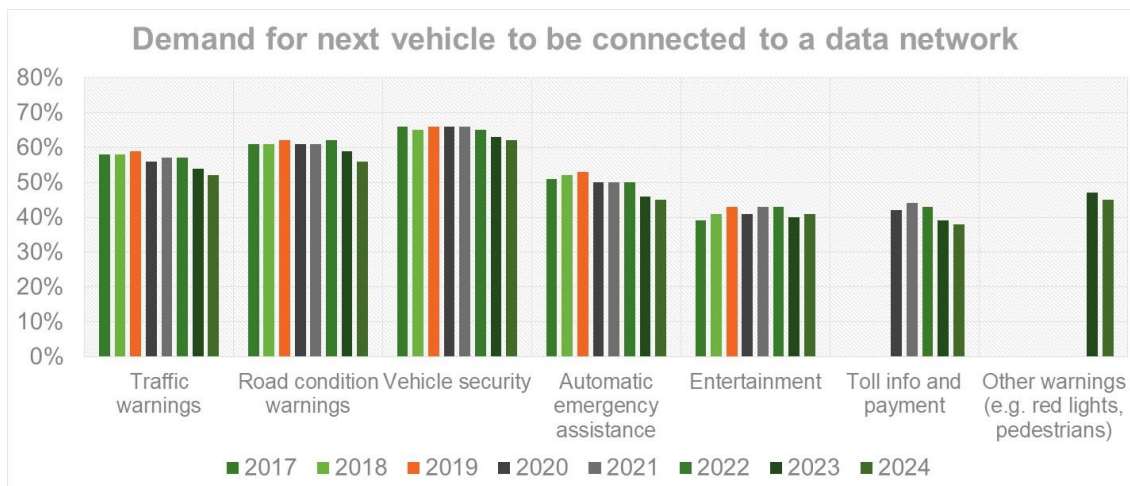
What are your expectations of the **MINIMUM** level of safety that should be provided by fully self-driving vehicles?



- One in three motorists continue to 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?



- While there has been a small decline in demand for vehicle connectivity over the past few years, a 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.
- 45% of motorists “definitely” want their next car to be connected to a data network for other warnings (e.g. red lights, pedestrians).
- 45% motorists “definitely want” their next car to be connected to a data network for

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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.

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