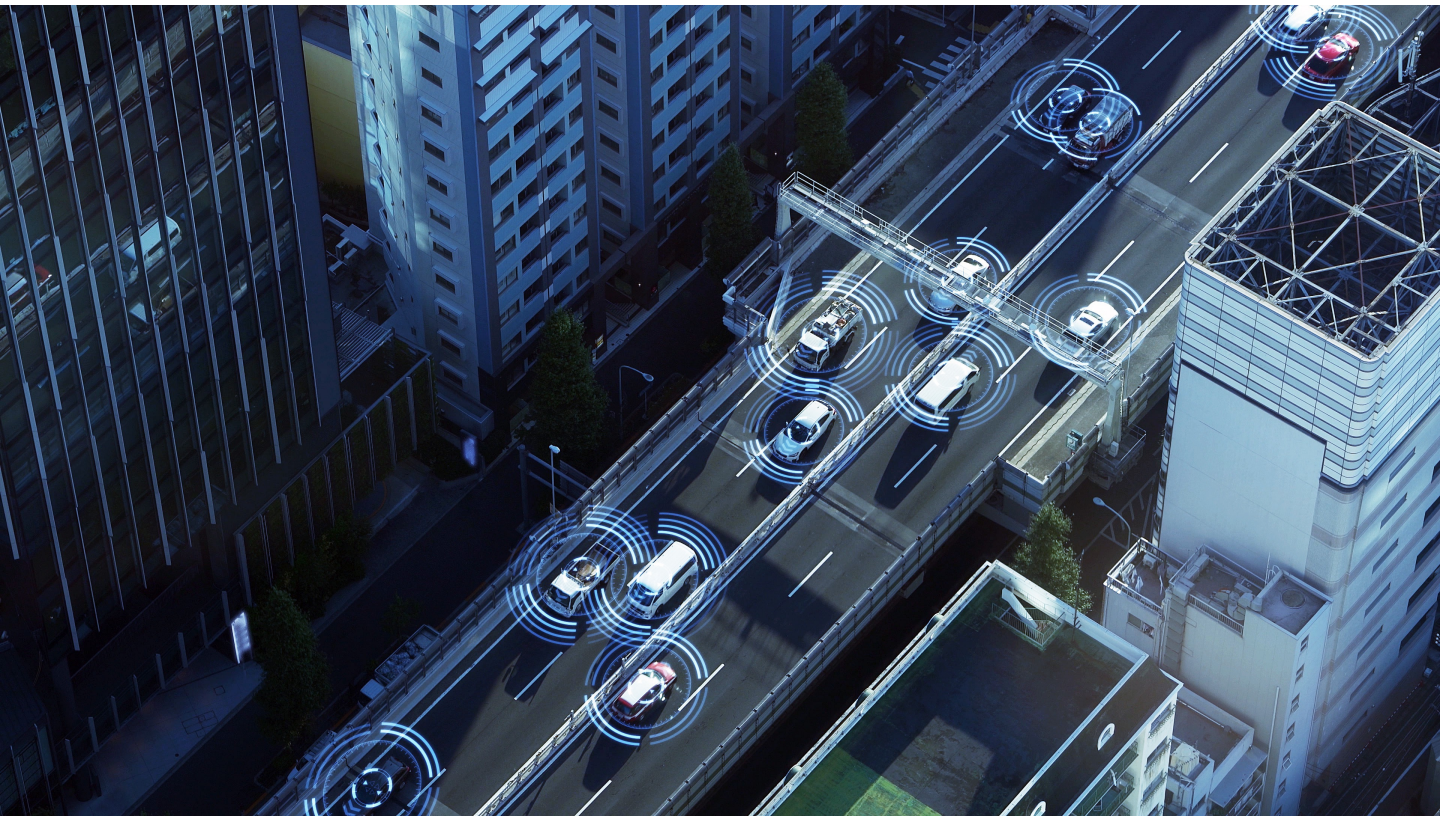




# Self-Driving Vehicle Sentiment Survey

United Kingdom, 2021



# CarGurus Self-Driving Vehicle Sentiment Survey

In this report, you'll find a recap of the study's findings followed by implications for the automotive industry and what this means for dealerships in particular.

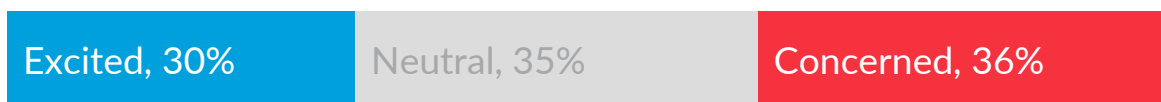
## About the study

In April 2021, CarGurus surveyed 1,007 automobile owners in the United Kingdom through an online survey on their sentiments towards self-driving vehicles and driver-assistance features. Respondents were balanced in terms of key demographics (gender, region, income). The study has been fielded for several years in the U.S. and was also fielded in Canada in 2021.

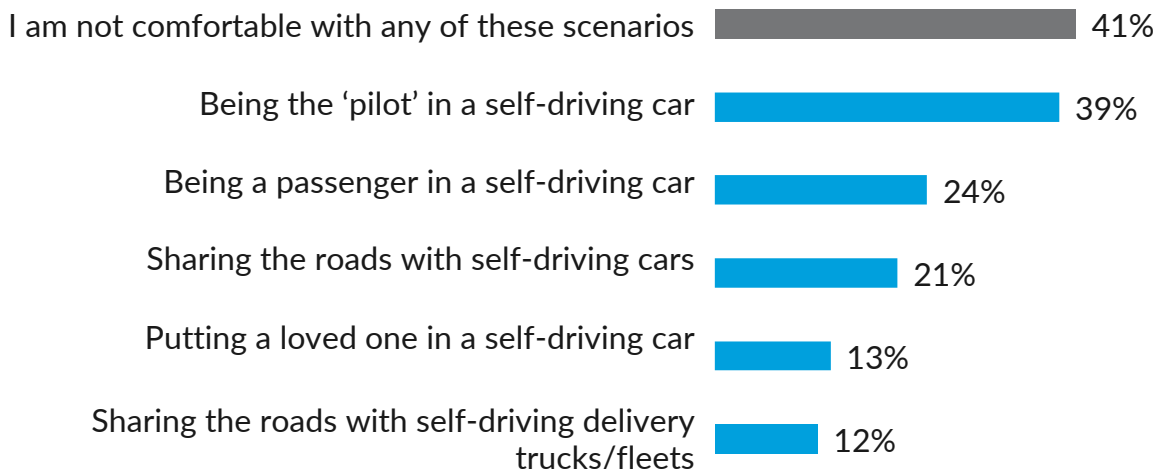
## Comfort with AVs

30% of respondents say they're excited for the development of self-driving cars– but more say they're concerned. People feel most comfortable with the idea of still being behind the wheel, and least comfortable sharing the roads with self-driving delivery trucks or putting their loved ones in a self-driving car.

What is your overall opinion about the development of self-driving cars?



Which of the following scenarios do you feel comfortable with?



# Timeline to AV adoption

A third of consumers expect to own a self-driving vehicle in the next ten years, or by 2031. Buyers say it's a huge leap in technology, but most are not yet convinced the pros outweigh the cons, especially with regard to safety.

How likely are you to own a self-driving vehicle..?  
*showing probably/definitely*



What are you most **excited** about when it comes to self-driving cars? Select up to three.

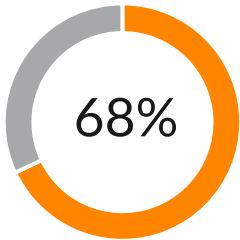
It's a huge leap in technology	45%
They will make travel by car safer	29%
I'd appreciate a car that does the driving for me	22%
They will make travel by car more fun	21%
They will make my travel/commute time more productive	19%

What are you most **concerned** about when it comes to self-driving cars? Select up to three.

They will be very expensive	48%
I'm not comfortable relying on them for safety	44%
I worry about who is responsible if something goes wrong	44%
I like driving and prefer to operate the car	28%
I don't think the technology is ready yet	27%
Sharing the roads with them	20%

# Driving assistance features

Driving assistance features, on the other hand, are widely regarded as advancements in safety. Buyers are most-interested in tech that helps them keep in control vs. tech that takes control.



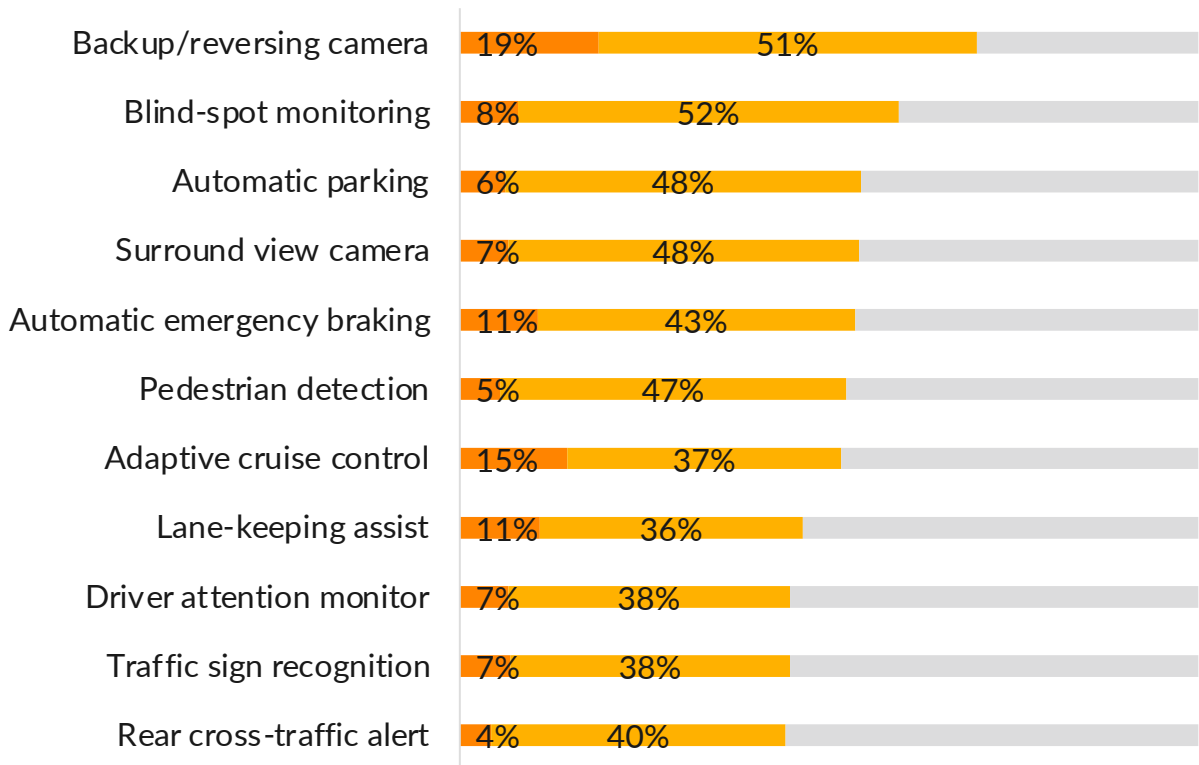
agree with the statement:

*“Driving assistance features make travel by car safer.”*

By comparison, only 29% of respondents chose “self-driving cars will make travel by car safer” as a reason to be excited for the technology.

Which of the following driving assistance features do you own? Which would you be interested in for your next vehicle?

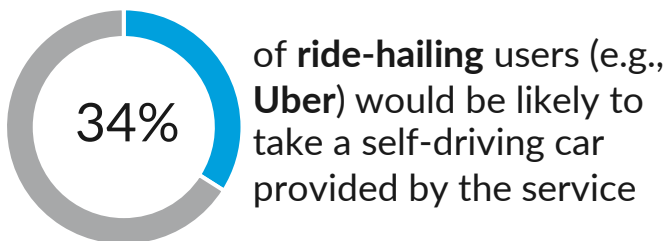
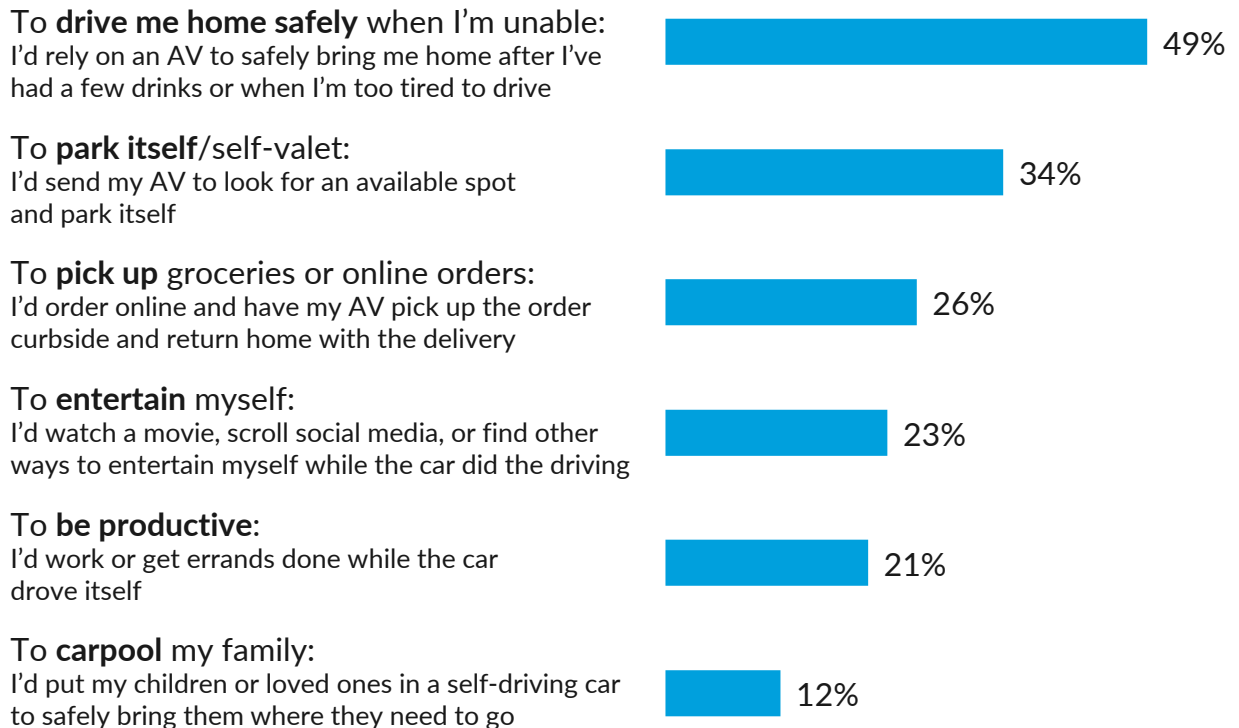
■ Already own    ■ Very/extremely interested



# How people imagine using AVs

When thinking about the possibilities self-driving cars can unlock, buyers are most excited by the idea of the car driving them home safely when they're unable, parking itself, and picking up online orders. There are also shared-transit users ready and willing to take driverless transportation.

Once the technology was safe enough to do so, which of the following ways would you want to use a self-driving car? Consider each and select all that apply.

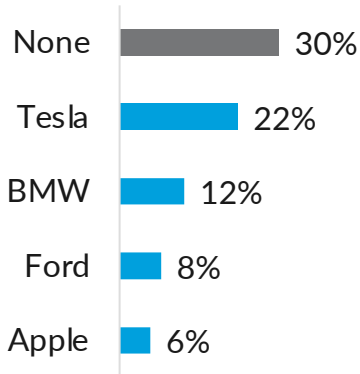


# Trust in AV brands

Tesla is the most trusted brand to develop AVs ([just as they were EVs](#)), but more respondents say they don't trust any company to develop the tech. While Tesla is seen as the leader in developing the tech, BMW and Audi are more likely to be considered by those interested in AVs.

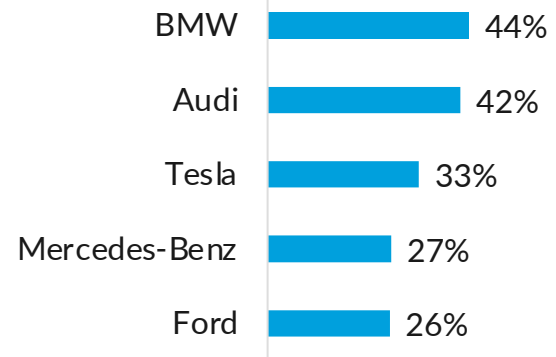
What brand do you trust most to develop self-driving vehicles?

Select one.



What brand of self-driving vehicle would you be likely to consider, assuming they were available?

Select all that apply.<sup>1</sup>



For what reasons would you not trust a brand's self-driving capabilities? Select all that apply.

The technology is too early for me to trust any brand's self-driving capabilities	51%
High-profile crashes in the news	30%
Overpromises/under-delivers on self-driving capabilities	25%
I don't know or recognize the company	22%
Not known as a tech-savvy company	22%
Not an established manufacturer of traditional cars	21%
I don't think their traditional cars are reliable	15%

If there is an accident involving a self-driving car (and no other drivers are to blame), who should be responsible for the damages? Select all that apply.

**48%**  
the **pilot** in the driver's seat and/or their insurance

**52%**  
the **manufacturer**  
e.g., Tesla, Ford

<sup>1</sup>among those who plan to own a self-driving vehicle in next decade

CarGurus 2021 Self-Driving Vehicles Sentiment Survey, United Kingdom (n= 1,007)

# CarGurus Self-Driving Vehicle Sentiment Survey

## *Implications for the automotive industry:*

1. **More people are concerned about AVs than excited.** Consumers need convincing the technology is safe and offers a meaningful benefit to their lives.
2. **Buyers are more interested in driving assistance features.** These technologies are widely regarded as safe, and interest is strong— even among features that dip into self-driving, like automatic parking or emergency braking.
3. **The AV tech offering must align with how people want to use it.** Consumers are most interested in using AVs to drive them home when they're unable to safely, which for many can be seen as interchangeable ride-hailing services like Uber. For personal ownership of AVs to happen, there needs to be more clear benefits and use cases for consumers.
4. **Tesla is most trusted to develop AV tech, but BMW and Audi are more likely to be considered.** Overpromises of self-driving capabilities and high-profile crashes are noted as top reasons to *not* trust an AV brand beyond it just being too soon to trust anyone.

## *Recommendations for dealerships:*

1. **Equip your team to educate consumers on driving assistance features.** Though the majority of consumers believe buying an AV is still at least 10 years away, interest in driving assistance features remains strong. More than two-thirds (68%) feel these systems make driving safer and they could be considered a steppingstone to self-driving cars. System names can vary by brand though, so it's crucial you have a deep understanding of the technology and provide consistent education to consumers during the buying process. More information will translate to more satisfied customers and safer drivers on the road, so start getting consumers familiar with them.
2. **Don't panic—AVs aren't imminent.** With 87% of consumers uncomfortable with the idea of putting a loved one in an AV and 61% uncomfortable putting themselves behind a driverless wheel, it's clear that consumers are likely to shy away from AVs for a while.
3. **Pay attention to key trends on the topic.** AVs won't be available to the public anytime soon—and could be extremely expensive when they are—but it's important to stay relevant. Keep an eye on what different brands are doing and be open to adapting when the time comes.