



DRIVERLESS VEHICLES: TRANSFORMING THE WAY WE TRANSPORT MODERN SOCIETIES

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To help us assess the state of public opinion, Kennedys conducted an online survey based on a sample of 1,000 UK adults. The survey was designed and commissioned by Cicero Research between 18 and 20 April 2017 based on a nationally representative sample of people aged 18 and over living in the UK.

EXECUTIVE SUMMARY

The consumer research findings show that Britons remain to be convinced of the benefits of driverless vehicles. Overall, the UK public does not currently have a consensus view in favour of driverless vehicles. Only a minority - 44% of the UK adults - favoured the use of driverless cars on the UK roads. A major public debate focussing on the benefits of the technology could see this picture shift quickly.

Public concern is greater when considering driverless commercial vehicles

People are uncomfortable sharing the roads with driverless commercial vehicles.

- Only one-in-five people are comfortable with the idea of driverless heavy goods vehicles being allowed on our roads.
- Meanwhile, 40% said they would be less inclined to get on board a driverless bus. 37% would be less inclined to use a driverless taxi.
- Even where automation is already widely used, such as trains, the public feels uneasy. 34% would be less inclined to take a driverless train.

- Those who drive commercial vehicles are among the least supportive (no doubt automation is perceived as a threat to their livelihood). Just 40% of those who drive as part of their day job support driverless vehicles.

Support for automation has its limits

The notion that the driver should be able to take over control of the vehicle is central to the public's concept of what kind of technology they would want to see developed.

- Over two-fifths support the notion that vehicles could in future be allowed to drive on the UK's roads without a human taking control at the steering wheel.
- However, just 4% support moving towards so-called 'Level 5' technology in which the car is always in control with no human override.
- Therefore, some kind of 'handover' function would be a necessary feature in order to maximise public support. This feature needs to be properly explained to help overcome concerns about potential driver confusion.

Improving the driver experience

Driverless cars seem like an affront to those who enjoy motoring: 40% thought it would make driving less fun. However, there are many potential benefits for drivers.

- 65% said driverless cars would result in 'efficiency' benefits such as knowing which routes are less congested and being able to take the quickest routes.
- 65% thought connected vehicles would be less likely to get lost.
- 61% recognized that this would free up time to do other things.
- 64% liked the car's ability to collect its owner on demand.

Safer roads and lower insurance premiums

The prospect of fewer road traffic accidents is very real, but there is still a widespread view that humans exercise better judgement than computers.

- Over half of all respondents (51%) believe driverless cars would result in fewer road accidents.
- 63% believed they would reduce the number of road rage incidents.
- 63% expect there to be a drop in motor insurance premiums.
- Concerns for road safety are an important factor among those who do not support driverless vehicles. Six-in-ten are concerned about the dangers posed by driverless vehicles to other road users such as pedestrians.
- 61% of those who oppose the technology prefer to place their trust in human judgement. Even though driver error is currently a major cause of road traffic accidents in the UK, 64% liked the car's ability to collect its owner on demand.

Social benefits

Never having to worry about falling asleep at the wheel or being able to drink alcohol and still 'drive' are obvious benefits. However, the real social transformation lies in extending social inclusion and independence to Britain's elderly, disabled rural communities.

- 73% of people thought driverless cars would enable elderly or disabled people to maintain their independence.
- 84% of those who are currently unable to drive due to disability support the introduction of driverless cars. Potentially one million people living with disabilities would become more likely to own their own car.
- The benefits extended to helping make rural communities less reliant on infrequent public transport services. 45% thought driverless vehicles would offer a significant benefit in this respect.

Long-term changes in motoring behaviours

It is not just the technology that is set to change. The way Britons own and insure their cars is set to transform dramatically.

- 12% of current motorists say they would be less inclined to own their own car. This could mean four million motorists trading their car in.
- 17% said they would be more inclined to lease their car and replace it regularly to keep up with technology. This could mean five million extra leased vehicles on the UK's roads.
- Currently, almost all motorists rely on fully comprehensive annual renewal insurance policies. However, 17% said they would be less inclined to take out an annual insurance policy reflecting changing behaviour patterns.

RECOMMENDATIONS

Realising the government's pledge to shape the UK into a world leader in new vehicle technologies, such as driverless cars, requires a collaborative approach between government agencies, the private sector and end-users. Only by working together can barriers be removed from companies in testing and adopting the technology on the UK's roads. Below we set out some of the issues each of the stakeholders will need to consider when promoting driverless vehicles.

The government

- The starting point in the development of connected and autonomous vehicle technology will be to recognise the need for a clearer liability framework. The government should therefore update UK legislation by reintroducing the Vehicle Transport and Aviation Bill, which begins to address the issue of insuring driverless cars involved in road traffic accidents.
- The UK government needs to continue to work in collaboration with the EU and the UN to develop common standards where possible to ensure that new technologies are developed consistently between different motor manufacturers and between different jurisdictions.
- In parallel with any legal changes, the government must undertake a wide-ranging public awareness campaign around the perceived benefits of the new technology. The public often fail to appreciate the potential for improved road safety and a reduction in the number of accidents and road deaths. Building greater awareness and public support will be essential in ensuring that the technology is quickly adopted.

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- The UK also needs to consider strongly the need for a broader and more inclusive process of public consultation around what type of technology is required to ensure that the voice of the end-users is heard when developing a new legal framework.
- The government should take more of a leadership role in helping to facilitate greater collaboration between stakeholders, by building greater communications between motor manufacturers, technology firms, motor insurers and end-user groups to help define what consumer needs look like and how best to address those needs through a set of common standards around driver behaviour and vehicle communications.
- A longer-term objective will be to work with all stakeholders in the development of new road infrastructure including new road lay-out, changes to junctions and slip roads, new road signage and any amendments to the Highway Code, all of which will be required to support the roll out of driverless vehicles. This also needs to be reflected in updated theory tests for all new drivers sitting their driving test.

Motor manufacturers

- All manufacturers need to work collaboratively to develop common standards governing driver and vehicle behaviour and vehicle communications. The potential danger of a fragmented approach between manufacturers operating in different jurisdictions needs to be avoided at all costs.
- Consult widely with motorists around the implications arising from Level 3 and Level 4 automated vehicle and the consequences for any move towards fully automated vehicles (Level 5). This needs to reflect the fact that public support for Level 5 automation is currently very low.
- Consider the need for additional driver awareness and training when rolling out the next generation of autonomous vehicles. All motorists purchasing an automated vehicle (Level 3 or beyond) will need to be issued with documents setting out the key features of vehicle behaviour and communications with point-of-sale training or orientation offered to motorists covering the automated vehicle safety and driver assist features.
- Communicate to customers about the importance of data protection setting out what data is likely to be collected, how it will be stored securely, and who will be able to access that information and for what purposes.
- Data management will also be a critical issue in the new driverless vehicles environment.

Manufacturers will need to anticipate the rapid increase in data collection and storage and should look to create an industry-wide data bank to demonstrate what impact the technology is having. It would be beneficial to share this data with government agencies and insurers.

Motor insurers

- Insurers need to get fully involved in efforts to develop the new technology to help them better understand the changing profile of risk when insuring the new vehicles and the impact on premium levels and pricing models.
- Commission their own end-user research to fully understand the likely changing patterns of car ownership and its consequential impact on consumer demand for distinct types of insurance cover.
- Product development teams will need to develop new types of policies which will reflect the

changes in customer behaviours. This might also result in motorists buying motor insurance in different ways, for example, insurance could become more of an ancillary sale aligned with the sale of new cars. Insurers need to anticipate the changing relationship between themselves and motor manufacturers.

- Educate existing customers about the new types of technology coming onto the market and how that is likely to impact on vehicle safety and insurance premiums.

FURTHER INFORMATION

To find out more about our services and expertise, and key contacts, go to: kennedyslaw.com

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