



# **SAFETY FIRST: THE EVOLUTION OF DRIVING AND MOBILITY IN 2020**





## INTRODUCTION

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Volvo Car USA has teamed up with The Harris Poll to deepen insights into the American opinion across four core themes: design, safety, technology and the environment. These insights are distilled into “Volvo Reports” and will feature information on various topics.

This edition of Volvo Reports investigates how safety, mobility and driving have evolved in the wake of a global pandemic this year.

We encourage you to use these statistics freely, properly sourcing Volvo Car USA/The Harris Poll. If you have any questions regarding these findings or would like to delve deeper into Volvo’s electrification commitment, please reach out to Thomas Schultz at [thomas.schultz@volvocars.com](mailto:thomas.schultz@volvocars.com).

## METHODOLOGY

This research includes two surveys: one that was conducted online within the United States by The Harris Poll on behalf of Volvo from September 15 to 22, 2020 among 2,002 licensed adults ages 18 and older, and one that was conducted on September 30 to October 13, 2020, among 2,003 licensed adults ages 18 and older. These online surveys are not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

# SAFETY TAKES ON A NEW MEANING

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In the wake of the global pandemic, safety has become increasingly top of mind, causing Americans to re-evaluate their relationship with the outside world. Concern over day-to-day safety has spiked during COVID-19, **as 8 in 10 say they are “more worried about the safety of themselves and their loved ones than they were a year ago” (79%)**. Safety is also taking on new meaning during this time, as a similar percentage say, **“safety has a broader definition to me now than it did 6 months ago” (82%) – and this isn’t just a temporary trend.**

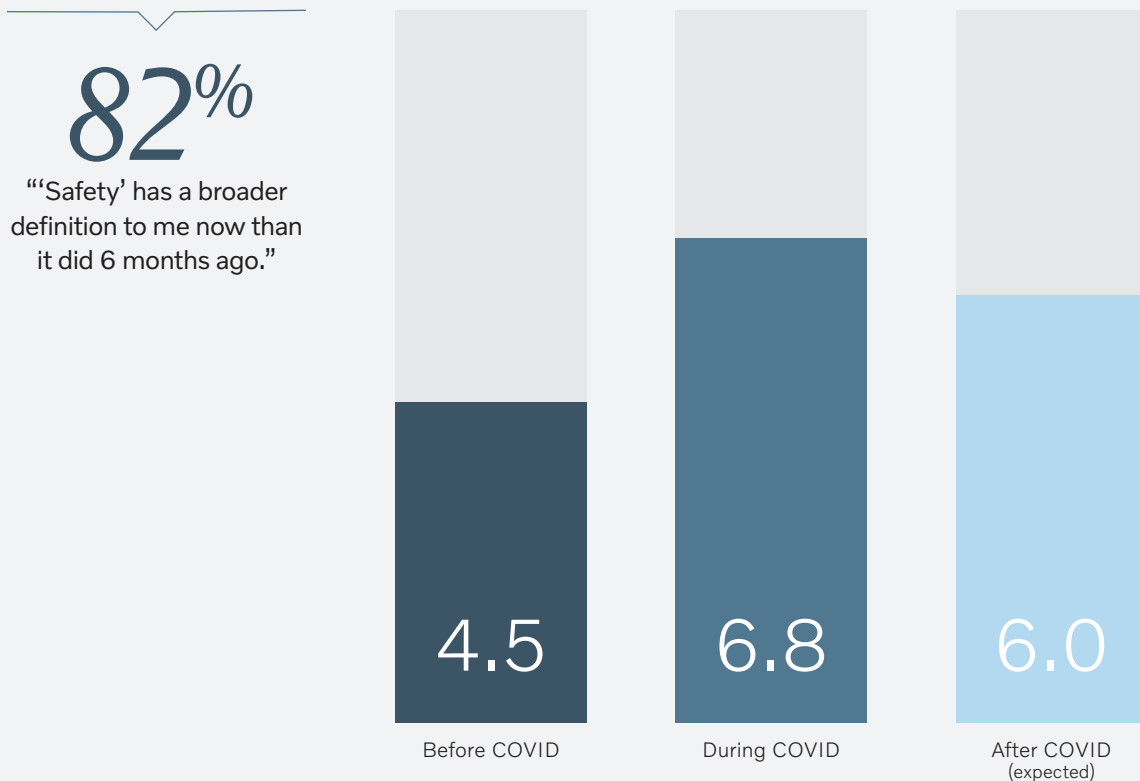
Most expect this heightened concern to continue even after the pandemic ends, resulting in a fundamental shift in how we think about safety and protection.

As Americans’ focus on safety rises, most are also working to create secure spaces of protection for themselves and their families. Cars and homes feel safest for most right now – and many are upgrading these spaces to be more accommodating for the current climate, especially amongst younger people.

## SAFETY TAKES ON A HEIGHTENED ROLE

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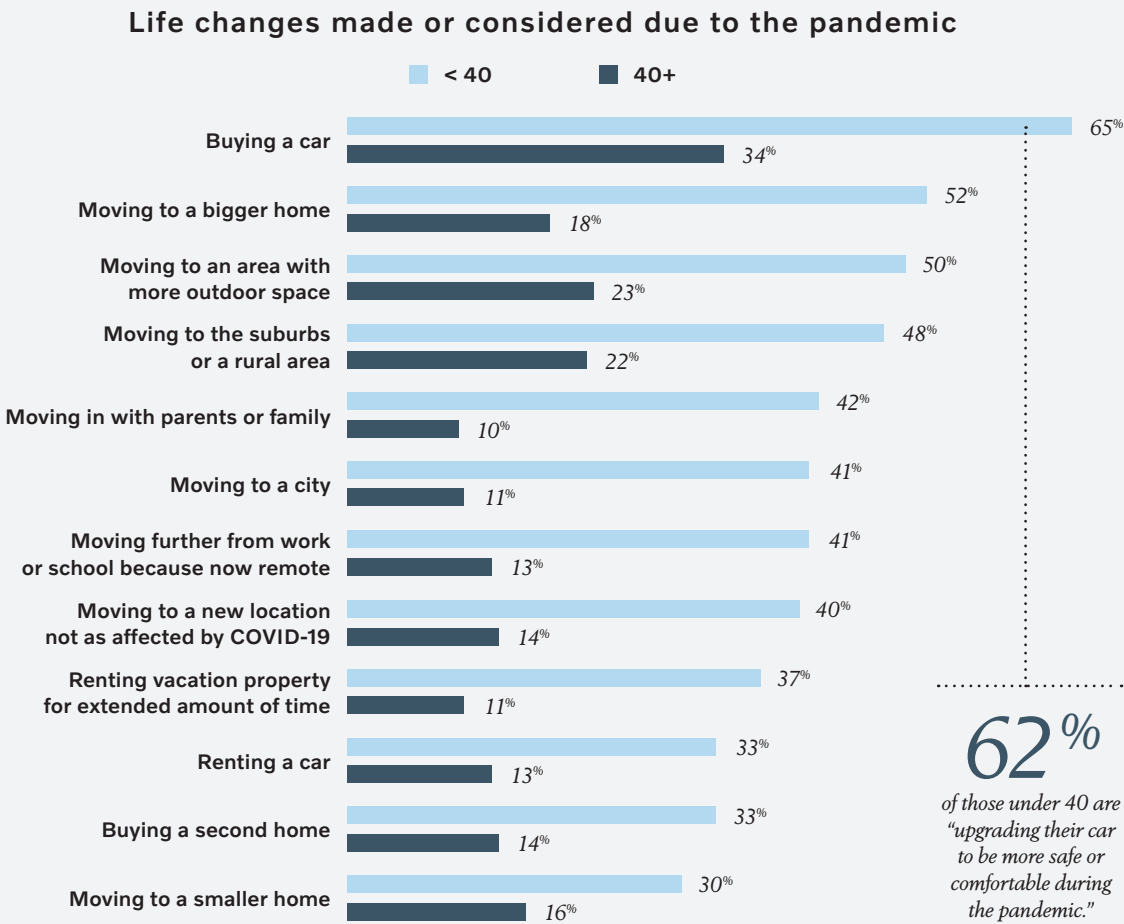
Average concern for day-to-day safety over time  
(1-10 scale)



Two-thirds of those under 40 years old – the Gen Z and Millennial generations – either have bought or are considering buying a car due to the pandemic (65%), saying they’d like to “upgrade their car” to be more safe or comfortable during this time (62%). A similar percentage say the same about upgrading their living arrangements (62%) for greener, more spacious pastures. Half either have or are considering moving to a bigger home (52%), to an area with more outdoor space (50%), or to the suburbs or a rural area (48%).

Others are working to make their current spaces safer and more comfortable, as two-thirds either have or are considering upgrading their home security systems (64%) or taking on a home renovation, such as remodeling an office to better accommodate working from home, or upgrading their kitchen to accommodate more home cooking (63%). On a day-to-day basis, young Americans have also been plussing up their grocery lists, taking steps like buying higher quality food, or food with immunity boosting properties to help stay healthy (72%), and their home appliances (60%).

GEN ZS AND MILLENNIALS EMBRACE THE SAFETY UPGRADE





In this intensified pursuit of protection, Americans are also prioritizing reliable brands, as two-thirds say they, “now seek out brands that are known for safety in their products and services” (67%). This is especially true for vehicles, with the vast **majority of drivers attesting they are more likely to seek vehicle brands that are trustworthy (84%) and known for safety (81%) during this time.**

Additionally, safety and reliability are the top values drivers are increasingly seeking from vehicle manufacturers compared to before the pandemic. **Two-thirds say they would “pay more of a premium for vehicle safety today than they would a year ago” (63%).** Meanwhile, showiness takes a backseat, as 67% say, “buying ‘flashy’ cars is not tasteful in the current economic climate.”

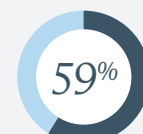
### Would you rather have a car known for...?

Safety

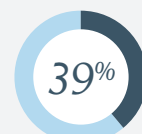


Flashiness

### More important of qualities in a vehicle manufacturer compared to before pandemic



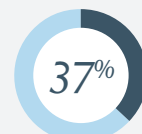
Safety



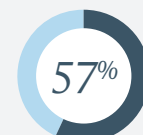
Authenticity



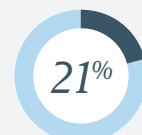
Reliability



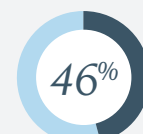
Innovation



Trustworthiness



Showiness



Reputation



# THE ROLE OF CARS DURING THE PANDEMIC

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As routines shift to become more homebound this year, cars are also serving new and different roles for consumers. 8 in 10 say their car has “been a lifeline for them during this time” (78%), and the vast majority agree that, “cars are the safest way to get around right now” (87%). Many are relying on their cars as an escape, saying “driving helps me relieve stress these days” (63%), including 3 in 4 Millennials (75%).





Most Americans also say that their car has been “a peaceful place for me to get away and escape during this time (71%).”

**More than half of new parents note that they have used their car as an “alone zone” (55%),** while Gen Zs are most likely to use their car as an “adventure mobile” (40%), and Millennials as a “snack stop” (35%).

3 in 4 have used their car as some form of escape (75%) – including 88% of those under 40 years old – such as going for a drive alone to get out of the house (30%) or taking a boredom drive to get family out of the house (25%).



## CARS HAVE BECOME A SOURCE FOR SOLITUDE, ESCAPE AND ENTERTAINMENT

Roles vehicle has played during COVID-19		Total	Gen Z	Millennial	New Parents
	Alone Zone	34%	46%	48%	55%
	Adventure mobile	28%	40%	37%	42%
	Snack Stop	23%	33%	35%	42%
	Childcare distraction	11%	10%	22%	18%

## Actions taken during the pandemic



30%

Gone for a drive alone  
to get out of the house  
40% new parents



24%

Gone on a  
road trip



9%

Drive-in activity  
or entertainment  
16% Luxury Drivers



29%

Driven to see family/  
friends at a distance  
37% new parents



18%

Used vehicle for  
other purpose  
36% Gen Z



25%

None  
of these  
12% under 40



25%

Driven to get family  
out of the house  
38% new parents



16%

Gone for a drive  
as a lunch break  
27% new parents



25%

Gone for a  
long drive  
29% Millennials



12%

Drive-by birthday  
celebration  
17% Gen Z

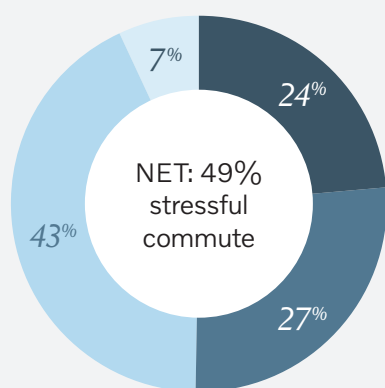
Another silver lining: commuting stress is down as many work remotely this year. Among those we surveyed, half who typically commute say they are working from home right now (51%), and national transportation-data firm Inrix reports that traffic decreased by as much as 41% nationwide in April

compared to pre-pandemic volumes. With fewer drivers on the road, our data also shows that commuting stress has dropped 20% this year when compared to 2018. Ironically, many now miss the solitude of commuting, including nearly half of Millennials who miss having a bit of time to themselves (46%).

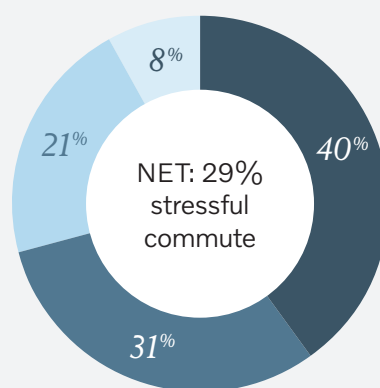
## COMMUTING STRESS DROPS DURING THE PANDEMIC

### Stress of commute

■ Not at all stressful ■ Not very stressful ■ Somewhat stressful ■ Very stressful



2018



2020

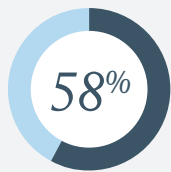
### Two-thirds of commuters (67%) miss something about the daily drive

Missed aspects of commuting	Total	Gen Z	Millennial	Gen X	Boomers+
Having a bit of time to myself	37%	34%	46%	35%	27%
Getting to listen to music or a podcast	33%	48%	39%	30%	23%
Having time to unwind on either end of the workday	24%	37%	31%	20%	15%
The routine/structure it gave to my days	24%	31%	31%	22%	12%
Other	2%	6%	2%	1%	1%
<b>N/A</b> N/A – I don't miss anything about commuting	33%	15%	21%	39%	53%

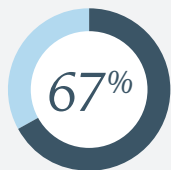




On the other hand, one downside of this decreased traffic could be a surge in reckless and distracted driving. 77% say they are just as or more comfortable speeding when fewer drivers on the road, while 4 in 10 admit “it’s tempting to speed or drive recklessly when there are fewer drivers on the road” (39%). Nearly half of drivers report personally witnessing more speeding (47%) and reckless driving (43%) than they did before the pandemic. Inrix also reports average driving speeds jumped by as much as 75% in some of the most congested areas of the country and fatality rates increased or stayed the same compared to pre-pandemic volumes.<sup>234</sup> Ultimately, **the majority believes that “people have become worse drivers during the pandemic” (58%).**



*of drivers say “people have become worse drivers during the pandemic”*



*of Millennial and Gen Z drivers say they have been more distracted behind the wheel due to the pandemic*

Alongside the rise of speeding and reckless driving, **many also report feeling more distracted while driving due to pandemic-related scenarios (49%),** such as stress about the world’s events (23%) or trying to navigate new driving situations like curbside pickup (19%). Nearly a third have tried to sanitize something while driving (27%), while 13% admit to taking a conference call on the road.

Millennial and Gen Z drivers are especially struggling to find focus, with two-thirds saying they have been more distracted behind the wheel due to pandemic (67%). Half of this younger cohort also say they have “never been as distracted as they are in 2020,” compared to only a third of those aged 40 and older (33%).

**Parents are also being uniquely challenged during this time, with 1 in 3 reporting unique COVID-19-related driving distractions (33%),** such trying to help a child with virtual school while behind the wheel – **which 15% of parents admit to doing.** Compared to before the pandemic, parents also say they are spending more time doing things like adjusting entertainment while driving to keep kids occupied and mediating disputes in the backseat. New parents are especially prone to report increased distraction during the pandemic (60%).

<sup>2</sup> [The coronavirus pandemic emptied America’s highways. Now speeders have taken over.](#) (Washington Post)

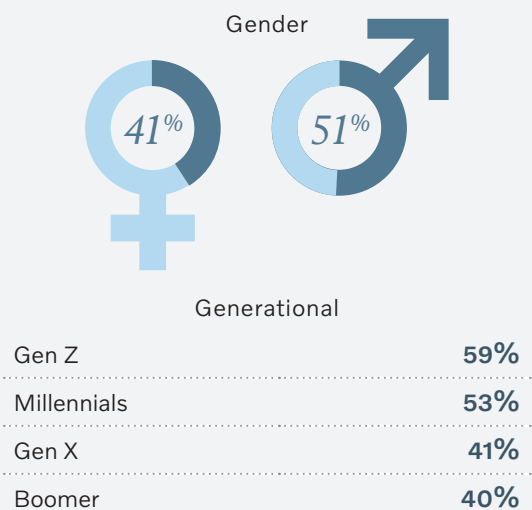
<sup>3</sup> [As coronavirus empties streets, speeders hit the gas](#) (Reuters)

<sup>4</sup> [The roads are quieter due to coronavirus, but there are more fatal car crashes](#) (Wall Street Journal)

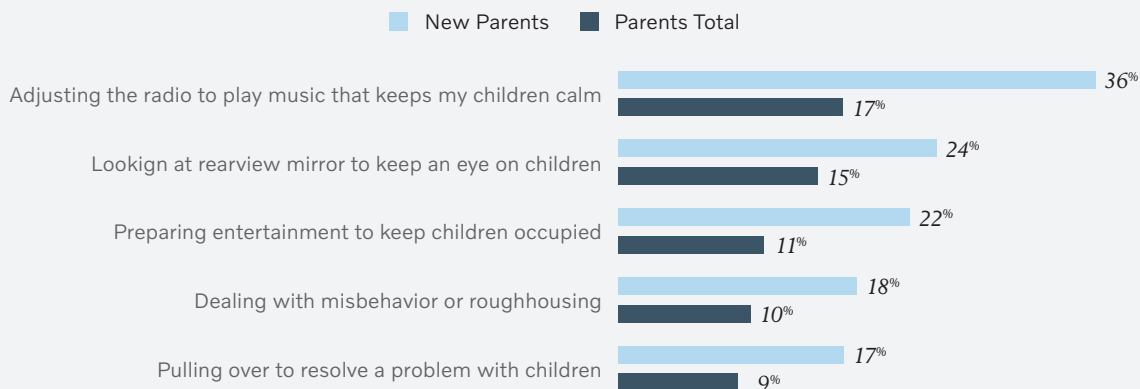
The pandemic has also introduced its own new set of logistical considerations. **Half of drivers say they wear a mask behind the wheel (46%)**, including a majority of men and younger Americans. Top motivators for wearing a mask while driving center around protecting others, with the majority of mask wearers saying they do so when other people are in the car (66%) and when going through a drive through (58%), though nearly 1 in 4 also say they have done so when driving alone (22%).

That said, two-thirds of drivers admit that wearing a face mask while driving can be distracting (67%), with those who have done so reporting issues such as discomfort (29%) and blocked vision (16%) due to the mask. Nearly half say they have adjusted their mask while driving (46%), and more than a third of parents with children under the age of 5 have also helped someone else adjust their mask while behind the wheel (35%).

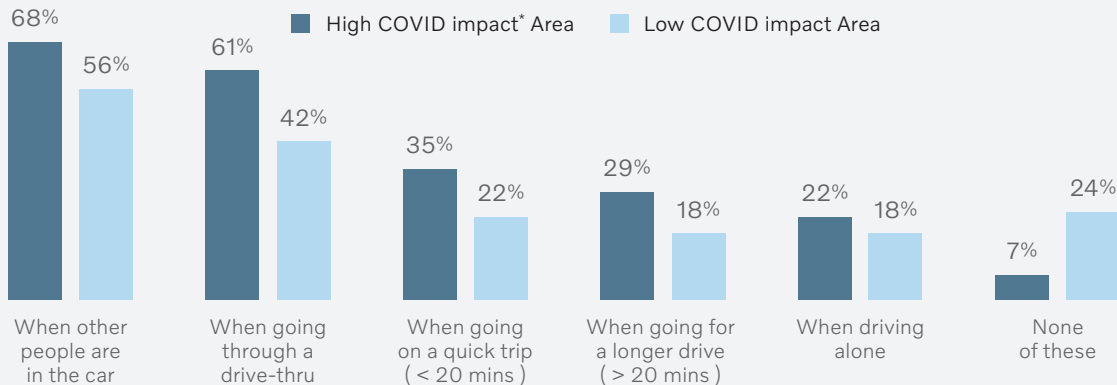
### Who's masking up behind the wheel?



### "Compared to pre-COVID times, I spend more of my time behind the wheel \_\_\_\_\_."



### Situations when drivers wear a mask



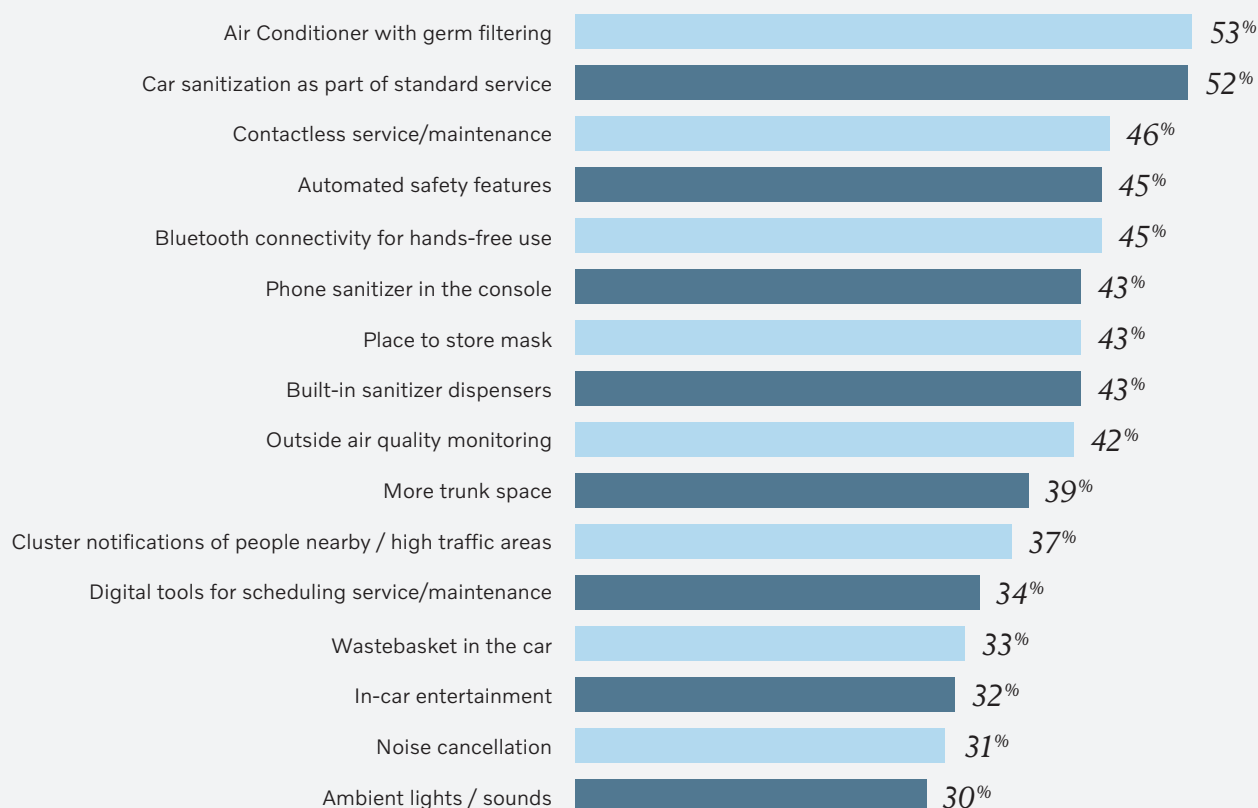
\* High COVID impact is defined as those who said their area had experienced an impact of 6 or more on a 10 point scale, while low impact refers to those whose area was impacted by 5 or less

# AMERICANS LOOKING FOR NEW TYPES OF VEHICLE ‘SAFETY’ FEATURES

As Americans increasingly rely on their cars for connection to the outside world and protection from it, appetite for built-in safety features is also on the rise. **Drivers’ top wish list items include vehicles that offer an air conditioner with built-in germ filtering (53%) and incorporate sanitization**

**procedures within the standard maintenance package (52%).** As majorities now keep supplies like face masks, sanitizer and disinfectant in their car, drivers are also seeking ways to make these items more accessible, such as having a phone sanitizer in the console (43%) or a designated place in the car to store a mask (43%).

## Vehicle features that are more important to people after the pandemic



## Safety supplies become console staples

### Items kept in car

■ Did Before COVID ■ Started during COVID

