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# Future Autonomous Vehicle Driver Study

September 2016



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## Background

Autonomous Vehicles are capturing the attention of the industry, consumers, dealers, automakers and developers alike. The industry is thirsty for guidance and inspiration in a time of dynamic change, uncertainty and excitement. **As an expert in Autonomous Vehicles, we wanted to gather consumer feedback to ignite new conversations around Autonomous Vehicles and the changes that will impact transportation and vehicles forever.**

## Research Objectives

Identify current consumer perceptions and misperceptions of Autonomous Vehicles overall and by each level of autonomy

Size the current marketplace in terms of appeal and overall perceptions towards Autonomous Vehicles

Reveal the occasions and situations in which people would use autonomous vehicles

Assess catalysts and barriers to adoption to better understand the “tipping point” into autonomy

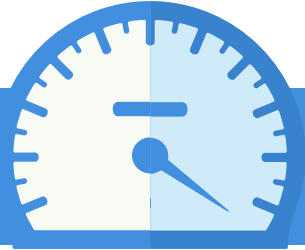


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# Methodology

National online survey of U.S. residents  
**12-64 years old**

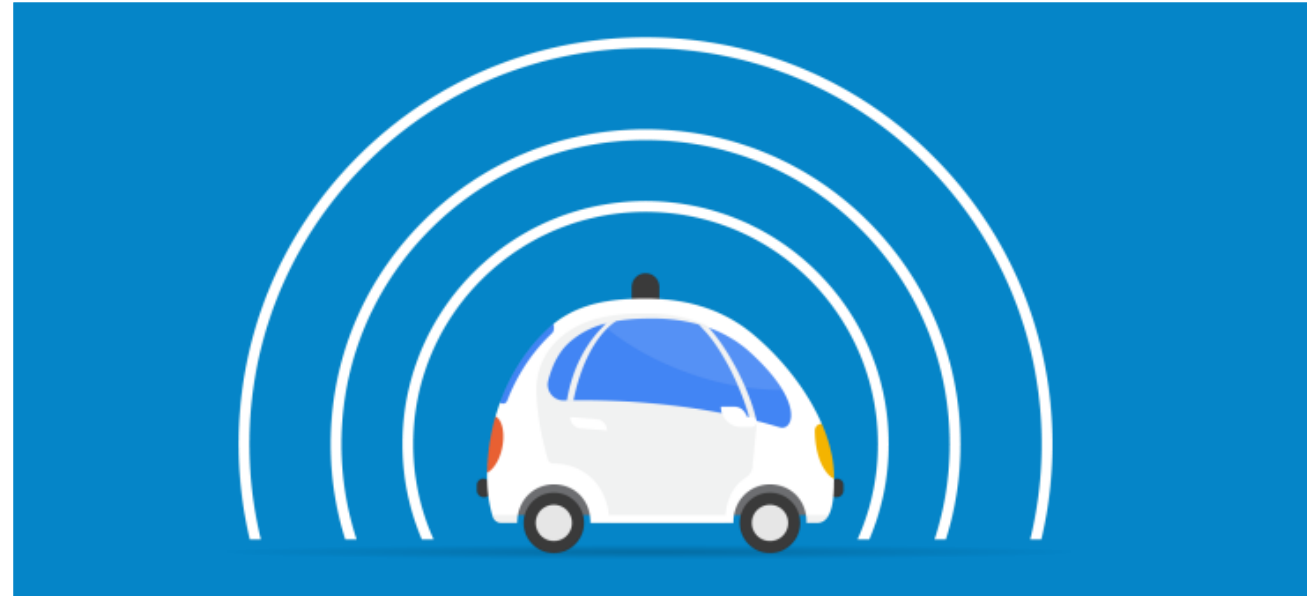
n= **2,264**



Conducted from **May 20-27, 2016**

*The sample was weighted to Census figures by age, gender, ethnicity and region.*

In order to quickly educate our respondents and bring them up to speed with the levels of autonomy, we showed them a short animation that touched on features that differentiate each level from the next.

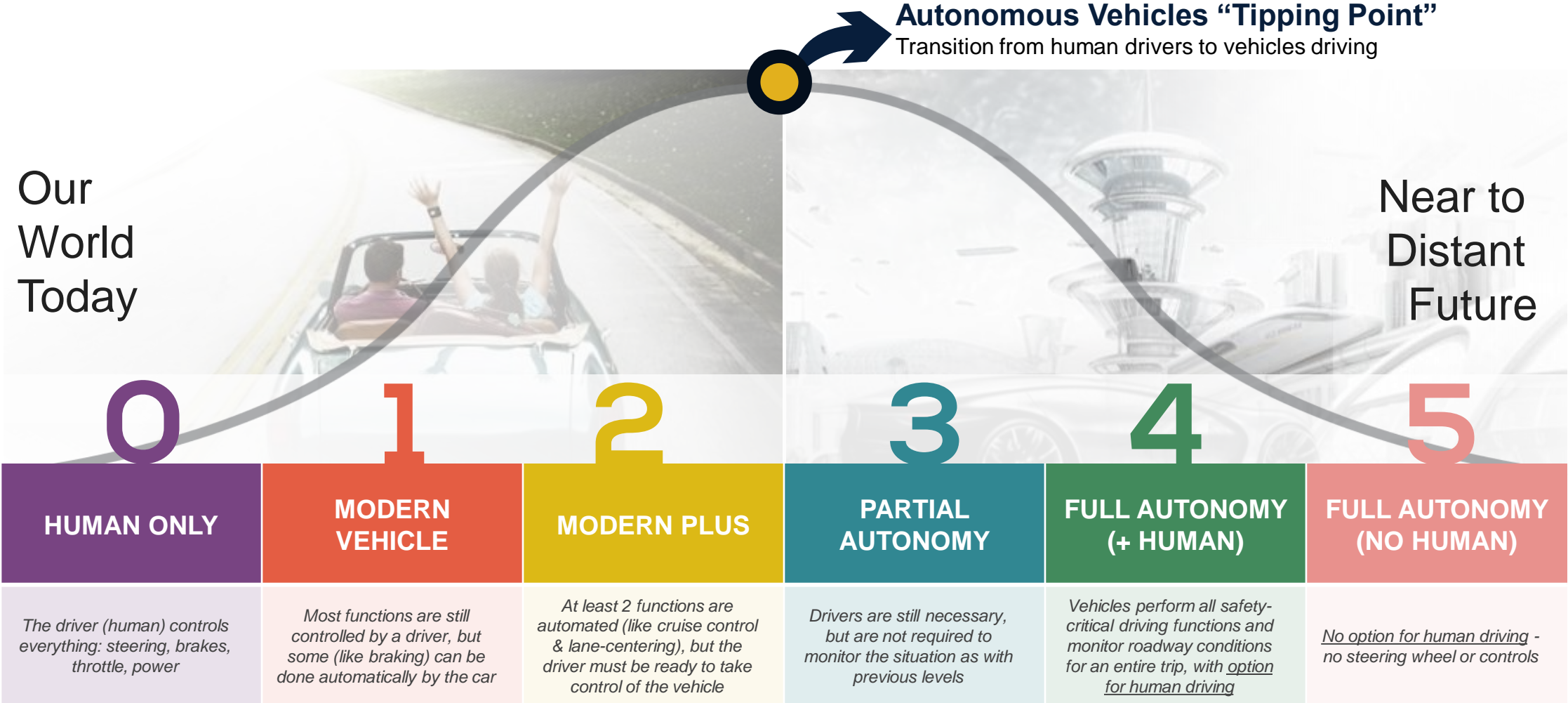


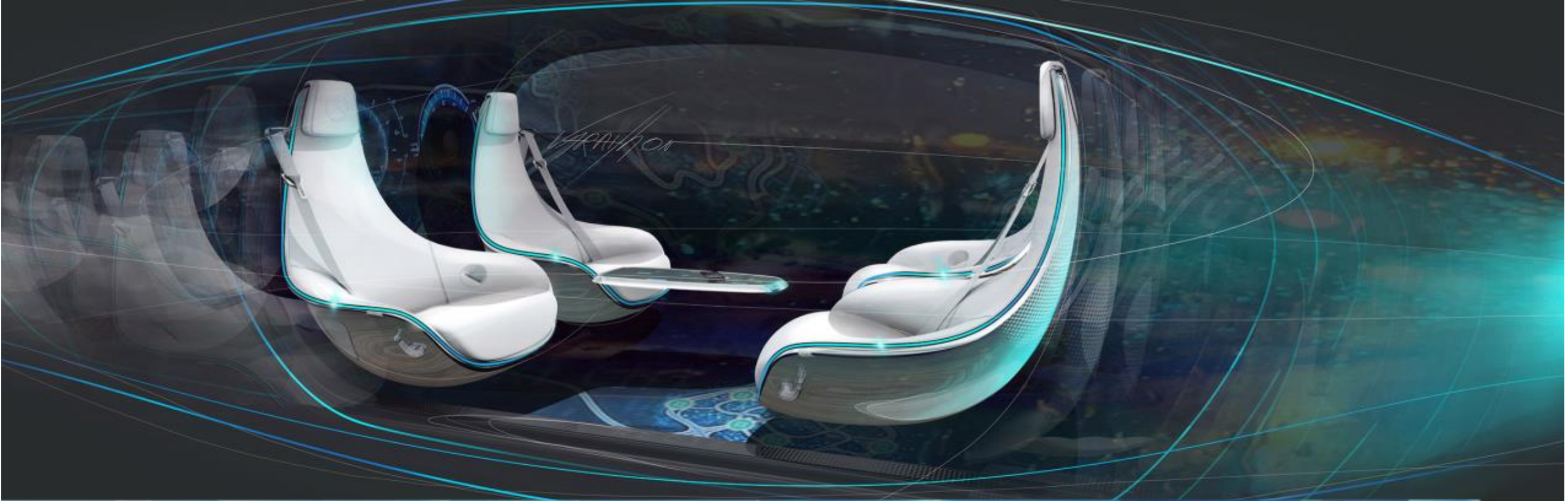
## LEVELS OF AUTONOMY DRIVING

5	<b>FULL AUTONOMY (NO HUMAN)</b> NO HUMAN DRIVER	VEHICLES DON'T CONTAIN STEERING WHEELS OR PEDAL, AND CAN'T BE DRIVEN BY HUMANS
4	<b>FULL AUTONOMY (+ HUMAN)</b> VEHICLE HAS FULL CONTROL	VEHICLES CAN OPERATE ALL ASPECTS OF DRIVING HUMANS CAN STILL DRIVE IF THEY WANT TO
3	<b>PARTIAL AUTONOMY</b> VEHICLE HAS TEMPORARY CONTROL	CAN TAKE OVER DRIVING IN THE CITY OR ON HIGHWAYS, BUT REQUIRES A HUMAN DRIVER FOR UNMARKED ROADWAYS OR HIGHLY CONGESTED AREAS
2	<b>MODERN PLUS</b> VEHICLE DETECTS A RESPONSE	CORRECTS LANE DRIFTING AVOIDS FORWARD/REAR COLLISIONS
1	<b>MODERN VEHICLE</b> VEHICLE DETINFORMS & ASSISTS	CRUISE CONTROL ANTI-LOCK BRAKES LANE-KEEPING ASSIST
0	<b>HUMAN ONLY</b>	THE VEHICLE HAS NO AUTONOMOUS FEATURES



# ➤ The levels of Autonomous Vehicles



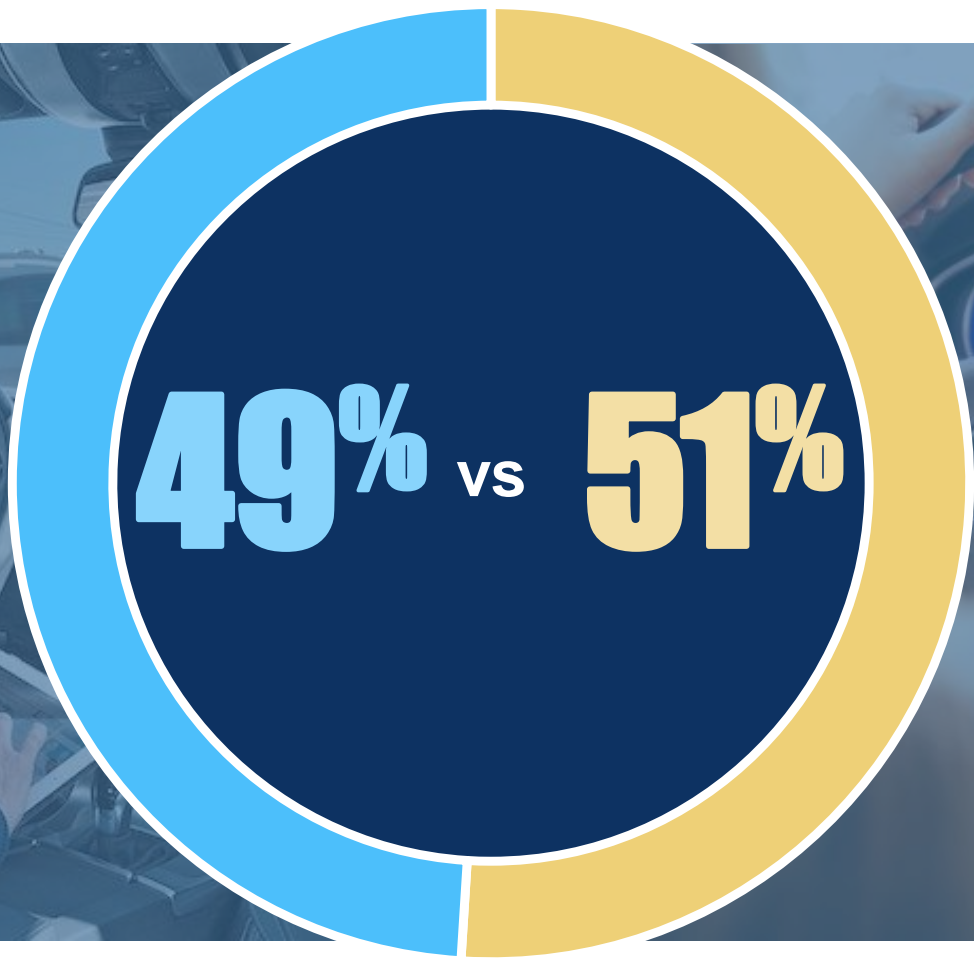


# Americans Proceed with Caution When It Comes to Level 5 Full Autonomy (No Human)



# ➤ Consumers are torn between the need for safety and the desire for control

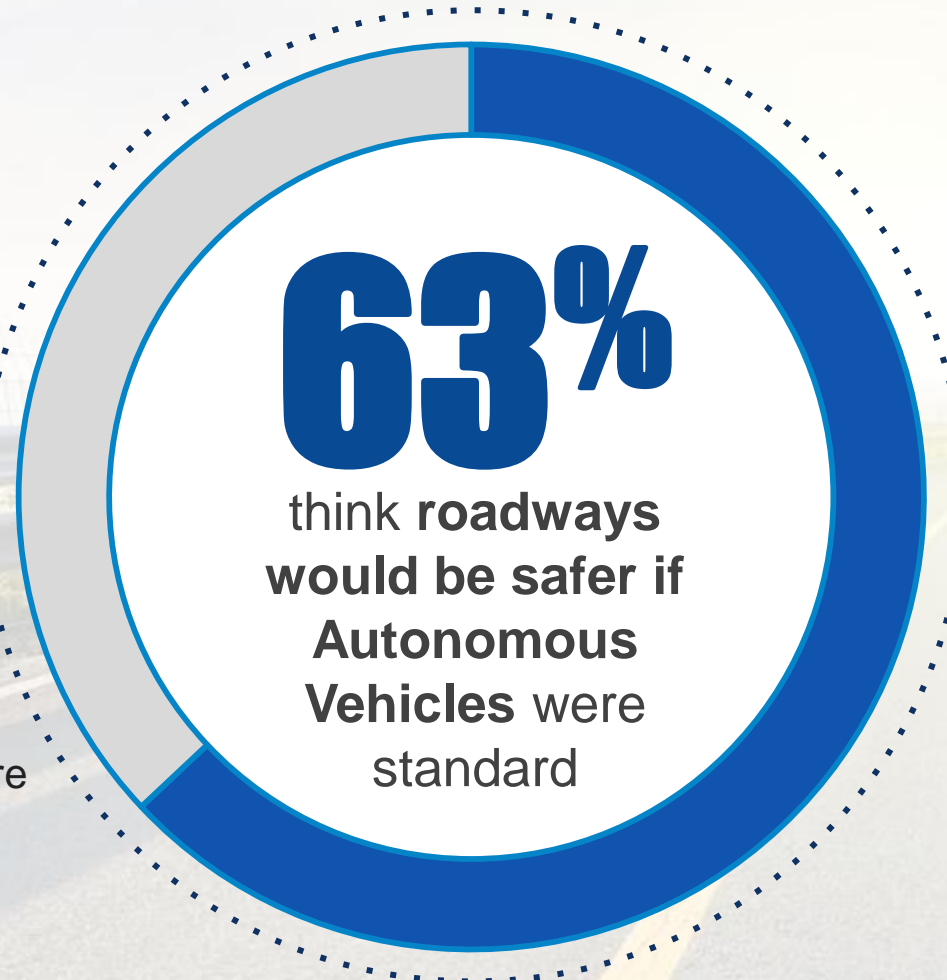
I prefer to have a safer roadway for all, even if that means I have less control over my own vehicle



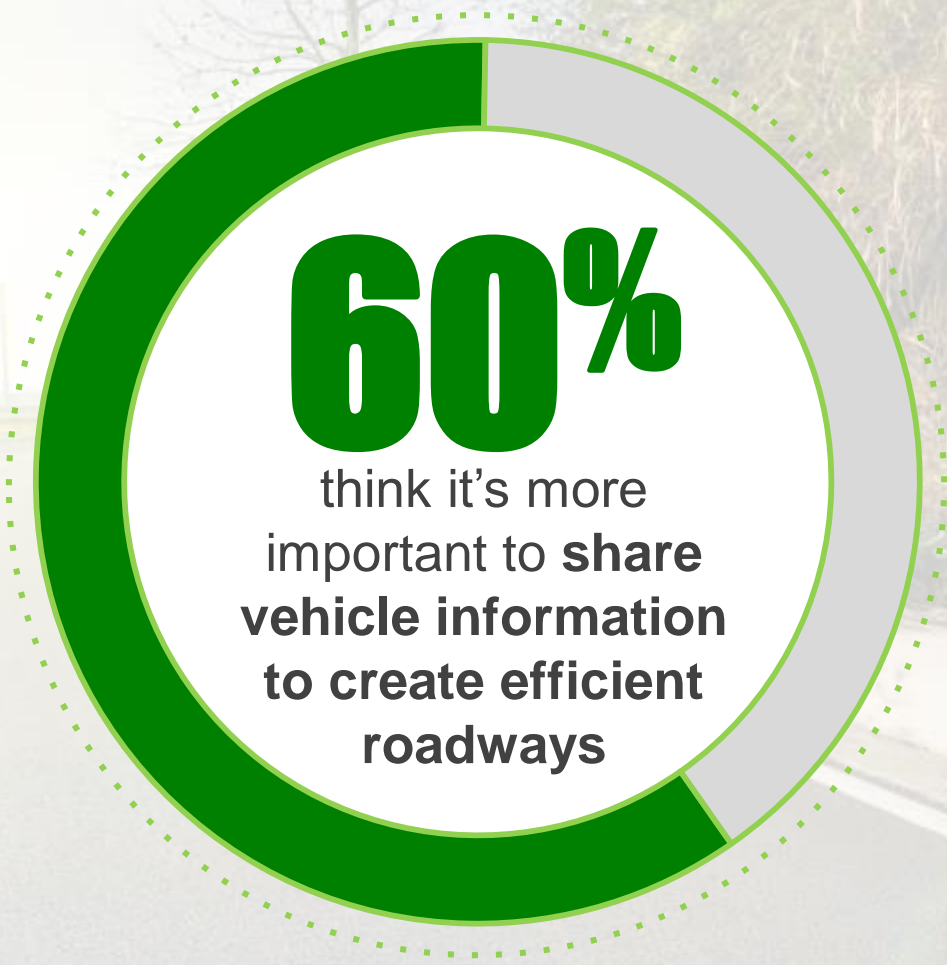
I prefer to have full control of my vehicle, even if it's not as safe for other drivers

➤ A majority of Americans see a world with fully Autonomous Vehicles as safer and more efficient... but there are detractors as well

**37%**  
think roadways would be safer if all vehicles were operated by people



**60%**  
think it's more important to share vehicle information to create efficient roadways



**40%**  
think it's more important to keep vehicle information private, even if roadways are less efficient



Base: Total (n=2264)  
ATT1. Below are some statements that people have used to describe their feelings towards Autonomous Vehicles and driving in general. For each pair of statements, please indicate which statement you agree with more.  
ATT1A. Below are two statements that people have used to describe their feelings towards this potential future, please indicate which statement you agree more with.

# However, today Americans still crave being in the driver's seat, as driving is far from being considered a chore

People should **always have the option to drive themselves**



If every vehicle can be driven by a computer system, it should be illegal for people to drive

**I need to be in control of my vehicle**



I would be comfortable letting a vehicle drive me without my control

**I love to drive/driving seems fun**



Driving is a chore/driving seems like a chore

**I prefer to drive when I'm in a vehicle**

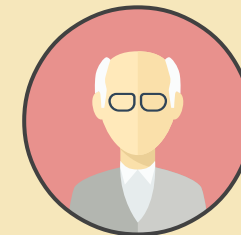


I prefer to be a passenger when I'm in a vehicle

**Occasions best fitted for Level 5 Full Autonomy (No Human) are limited to:**



**59%**  
Those Involving alcohol



**37%**  
Traveling for seniors



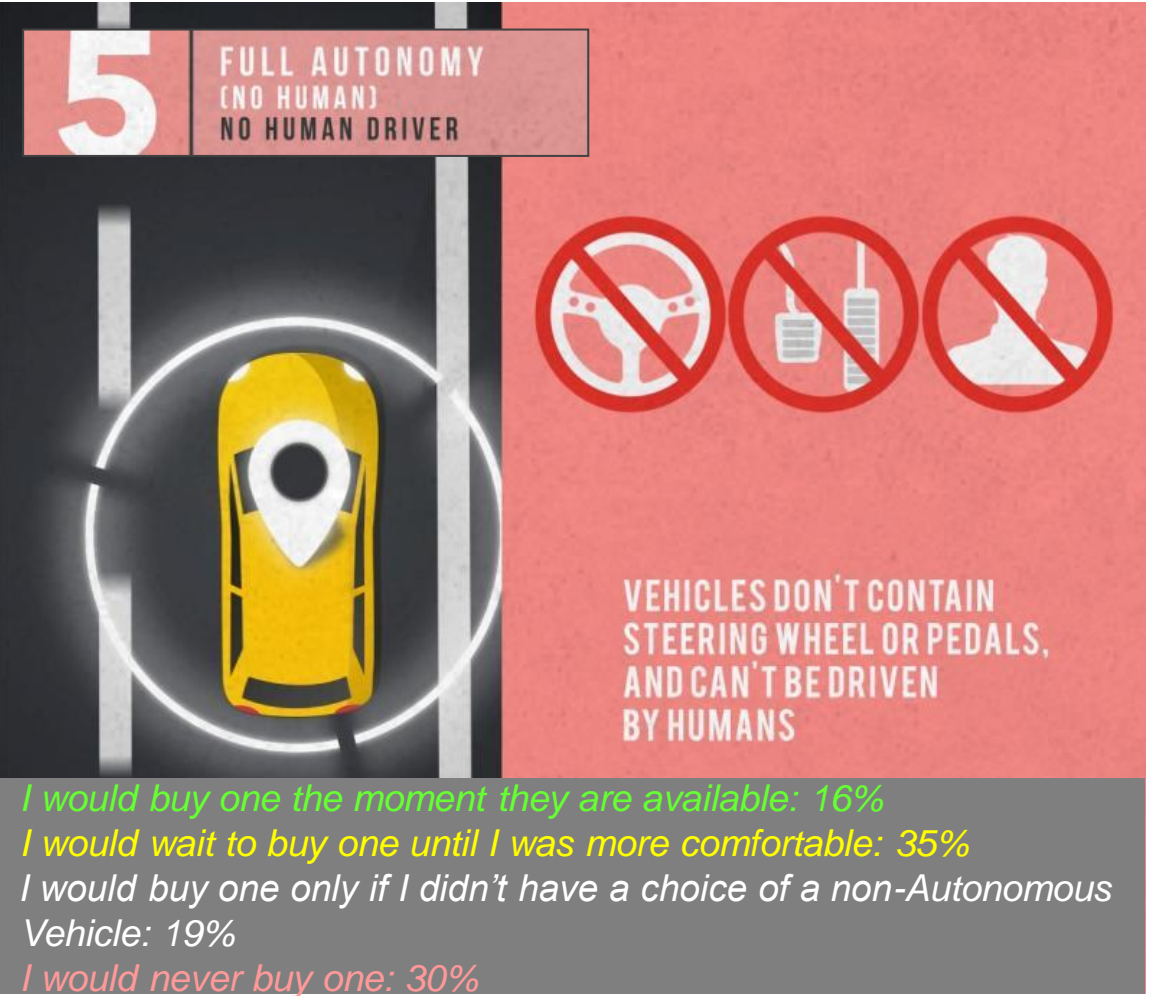
Base: Total (n=2264)

ATT1. Below are some statements that people have used to describe their feelings towards Autonomous Vehicles and driving in general. For each pair of statements, please indicate which statement you agree with more.

AV9. For each occasion, please select the level(s) of autonomy that you think is the best fit.



# ➤ As such, Americans aren't quite ready for Level 5 Full Autonomy (No Human)



Base: Those responding (n=1695)  
AV13A: And which of the following best describes your attitude toward buying/leasing an autonomous vehicle at each level?



# Autonomous Vehicles are Still a Mystery to Consumers



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➤ Americans are more familiar with the term “Self-Driving Vehicles” than “Autonomous Vehicles”

Terms Heard of

Self-driving Vehicles

79%

Driverless Vehicles

70%

Autonomous Vehicles

41%



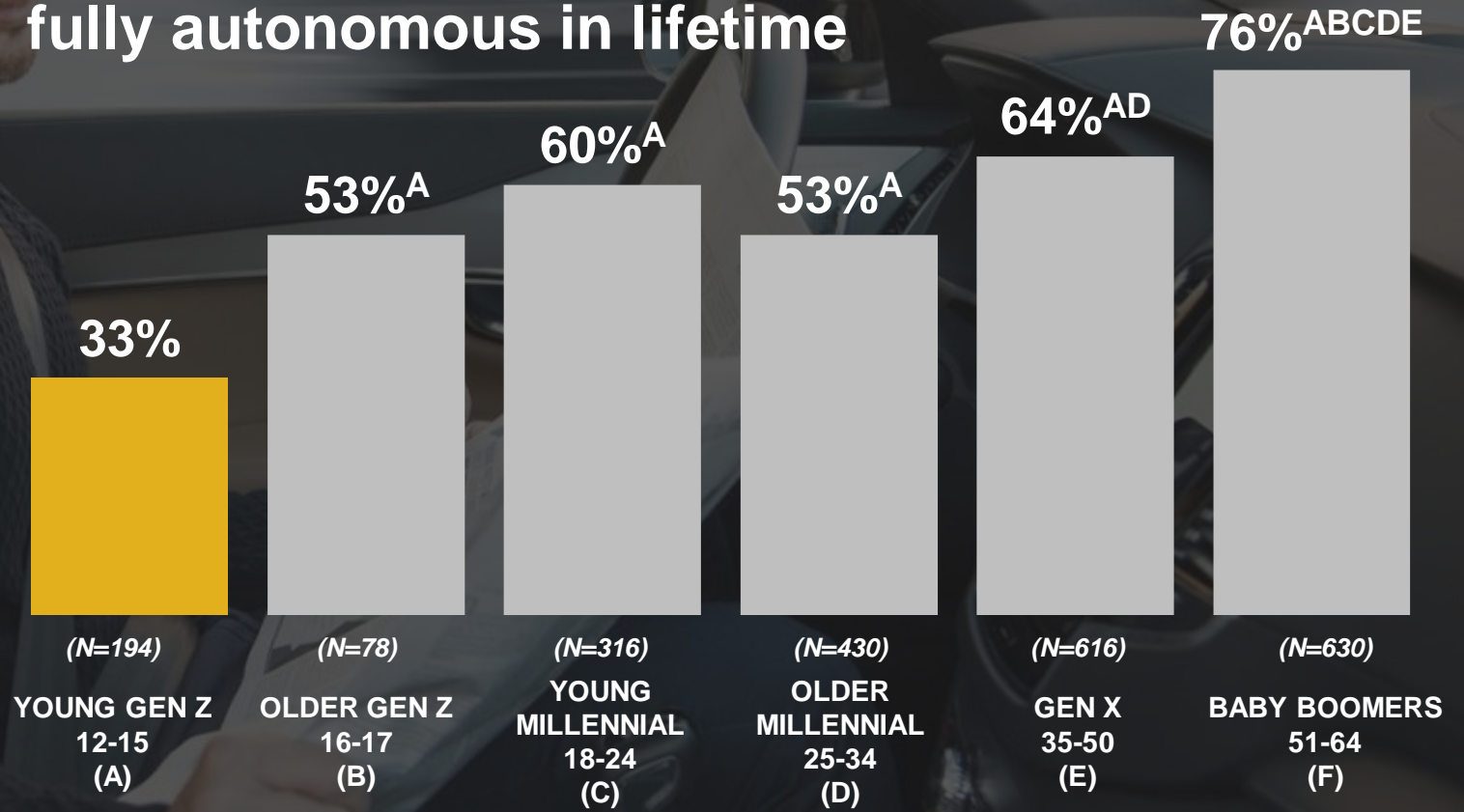
Base: Total (n=2264)  
AV1: Have you ever heard of any of the following?

Most consumers do not think they will live to see a world where all vehicles are fully autonomous; this sentiment is strongest among older consumers



*“I don’t think all vehicles will be fully autonomous in my lifetime”*

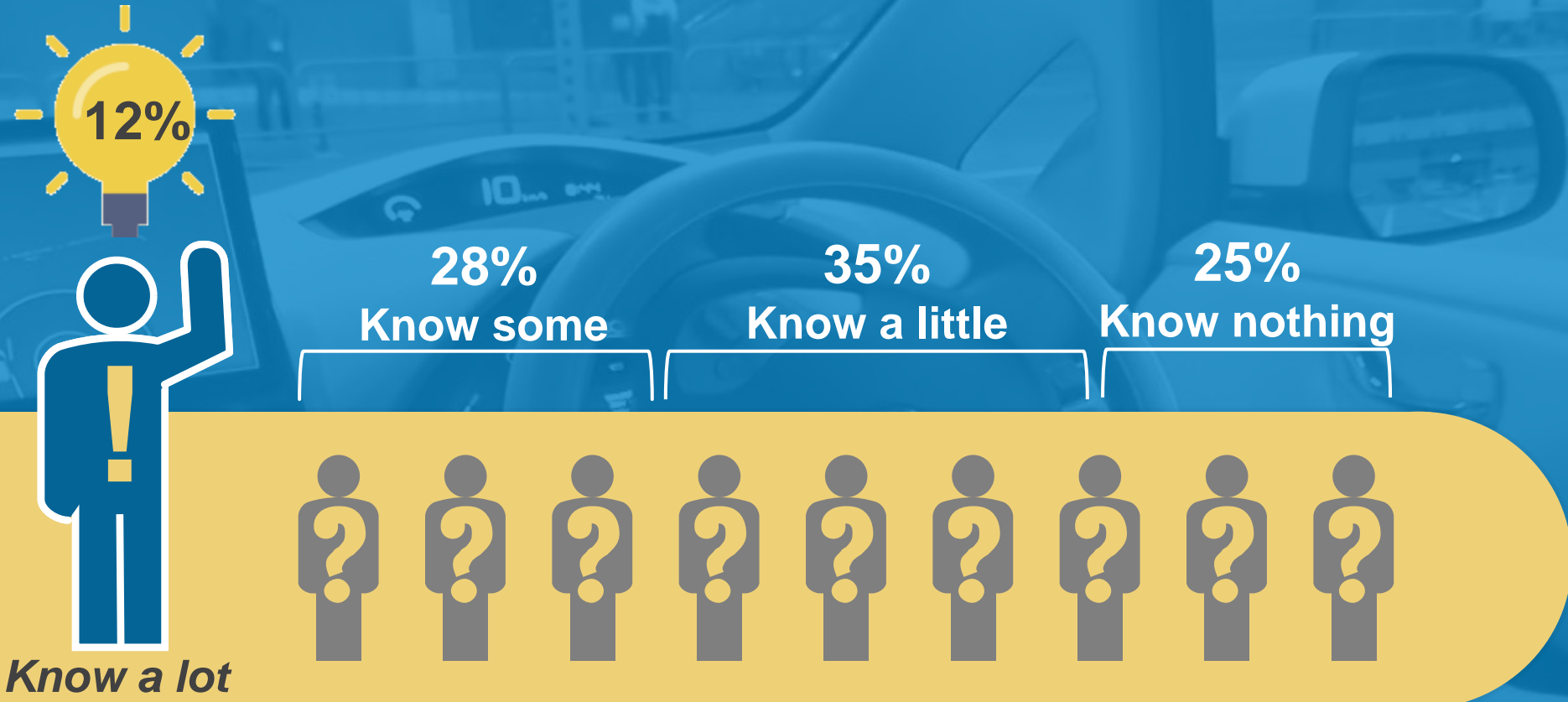
% DON'T think all vehicles will be fully autonomous in lifetime



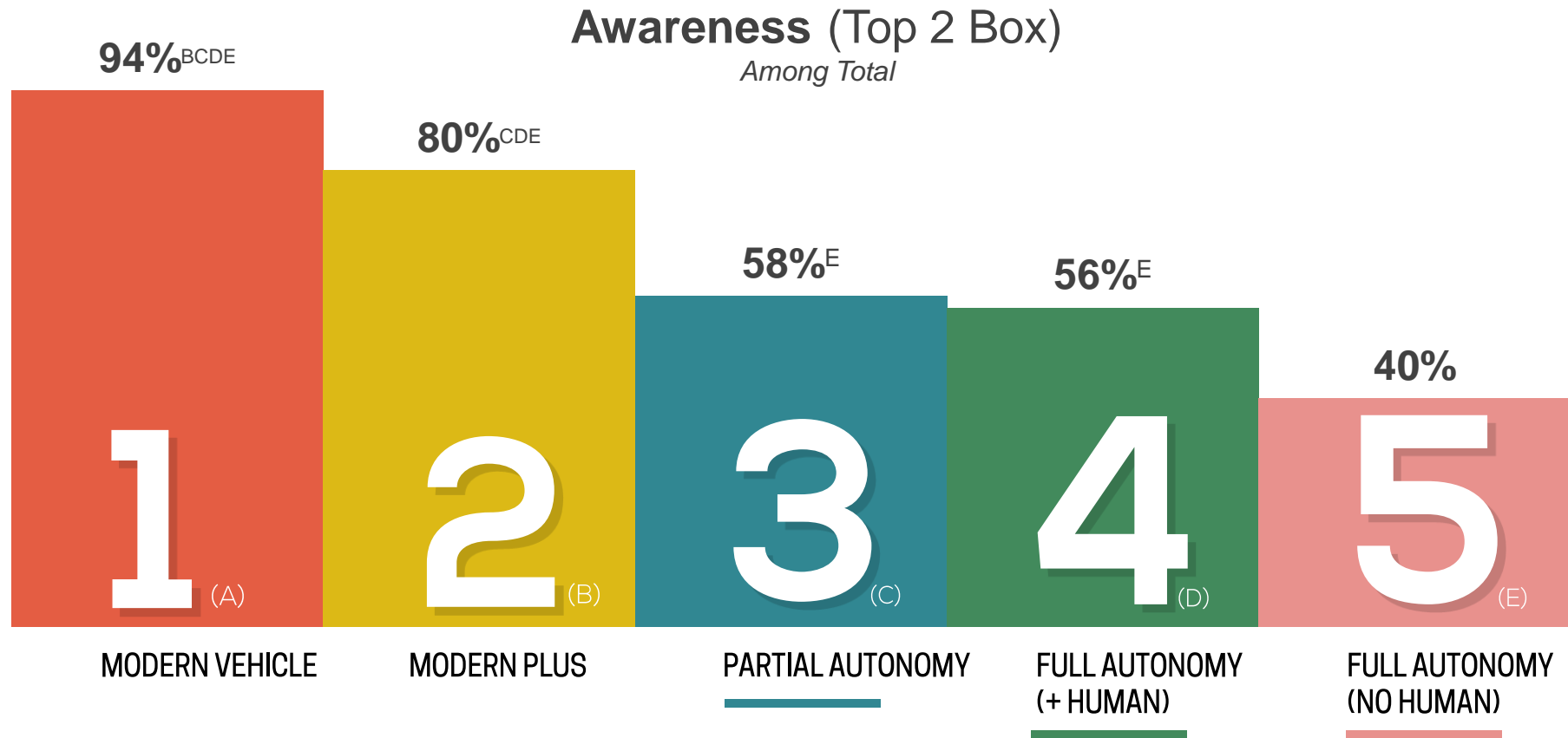
Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-F  
 Base: Total (n=2264); By generation (varies)  
 ATT5. Do you believe all vehicles will be fully autonomous/self-driving in your lifetime?

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# ➤ 6-in-10 know little or nothing about Autonomous Vehicles



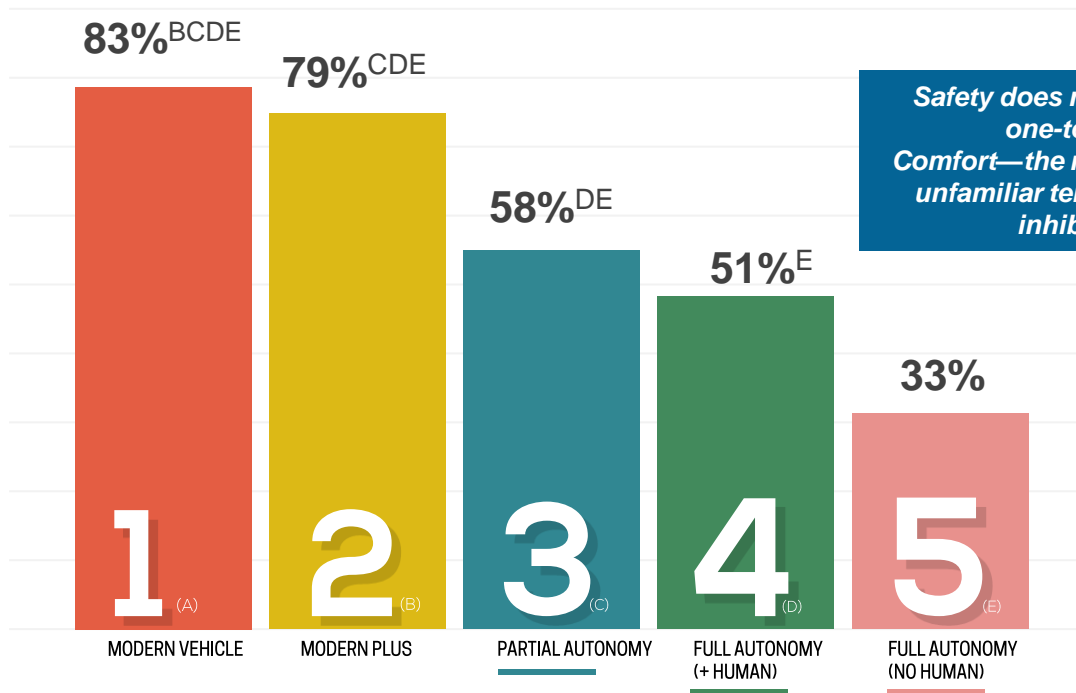
# ➤ Only about half of Americans are aware of higher levels of autonomy, with a large drop off from Level 2 Modern Plus to Level 3 Partial Autonomy



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
Base: Total (n=2264)  
AV4A. What is your familiarity with each level of vehicle autonomy below?

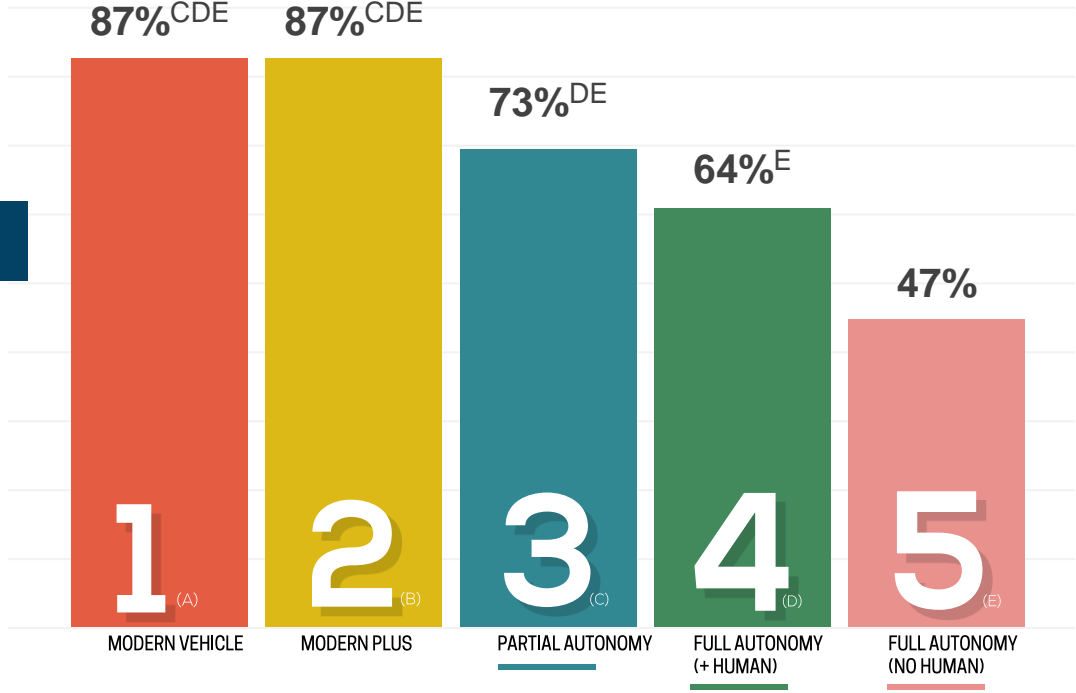
# Americans are most comfortable with vehicles on the road today, even thinking Levels 1 Modern Vehicle & 2 Modern Plus are significantly safer than higher levels of autonomy

**Comfort (Top 2 Box)**  
Among Total



*Safety does not equate one-to-one with Comfort—the mystery of unfamiliar territory can inhibit comfort*

**Safety (Top 5 Box)**  
Among Total



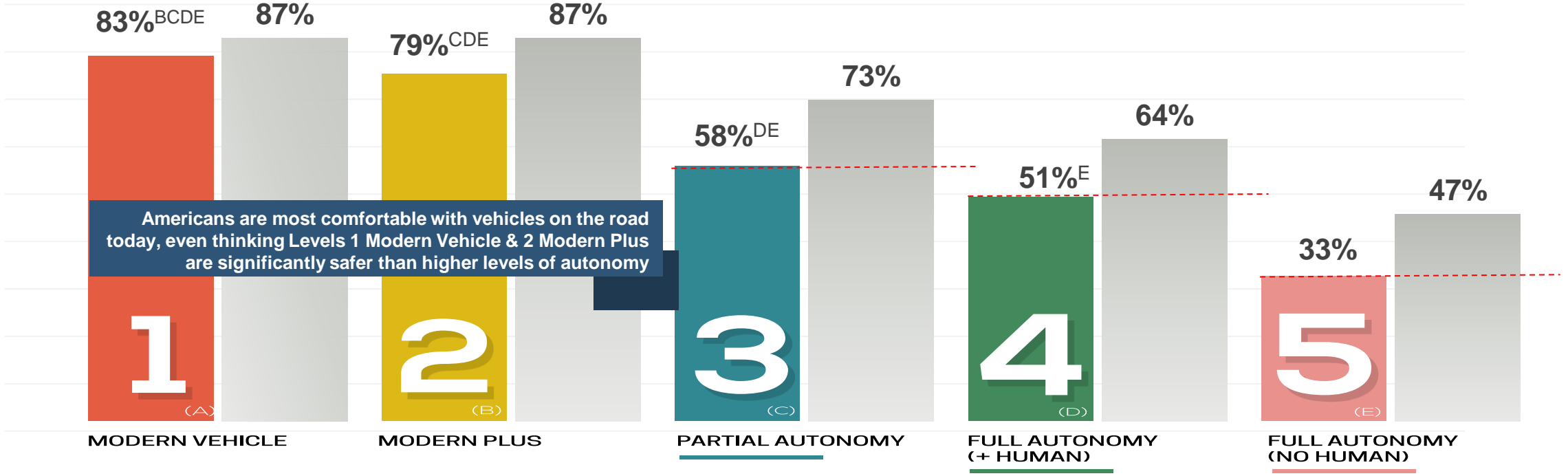
Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
Base: Total (n=2264)

AV8. Based on what you've seen, heard, or read, how comfortable are you with each level of vehicle autonomy?  
AV7. How safe would you feel traveling in a vehicle at each level of autonomy?

# ➤ Safety does not equate one-to-one with Comfort when it comes to higher levels of vehicle autonomy as the mystery of unfamiliar territory may inhibit comfort

**Comfort (Top 2 Box)**  
Among Total

**Safety (Top 5 Box)**  
Among Total



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
Base: Total (n=2264)

AV8. Based on what you've seen, heard, or read, how comfortable are you with each level of vehicle autonomy?  
AV7. How safe would you feel traveling in a vehicle at each level of autonomy?



➤ Though lower levels of autonomy are most associated with daily life activities, the jump to higher levels of autonomy is not far off (as Levels 3 Partial Autonomy and 4 Full Autonomy (+Human) are similar to Level 1 Modern Vehicle)

**1** (A)  
MODERN VEHICLE

**2** (B)  
MODERN PLUS

**3** (C)  
PARTIAL AUTONOMY

**4** (D)  
FULL AUTONOMY  
(+ HUMAN)

**5** (E)  
FULL AUTONOMY  
(NO HUMAN)

Levels 1 & 2 are most associated with day-to-day activities, but Levels 3 & 4 show potential

Going shopping/running errands

34%<sup>CDE</sup>

45%<sup>ACDE</sup>

31%<sup>E</sup>

30%<sup>E</sup>

14%

Going to the movies/out to eat

33%<sup>DE</sup>

45%<sup>ACDE</sup>

31%<sup>E</sup>

29%<sup>E</sup>

15%

City street travel

31%<sup>DE</sup>

44%<sup>ACDE</sup>

34%<sup>ADE</sup>

30%<sup>E</sup>

16%

Shuttling kids to school/activities

30%<sup>E</sup>

45%<sup>ACDE</sup>

30%<sup>E</sup>

29%<sup>E</sup>

18%

Heavy traffic

27%<sup>E</sup>

43%<sup>ACDE</sup>

30%<sup>AE</sup>

30%<sup>AE</sup>

20%

Freeway and highway travel

26%

37%<sup>AE</sup>

40%<sup>ABE</sup>

41%<sup>ABE</sup>

25%

Road trips longer than 100 miles

24%

30%<sup>AE</sup>

37%<sup>ABE</sup>

44%<sup>ABCE</sup>

26%

Traveling for seniors

16%

28%<sup>A</sup>

26%<sup>A</sup>

37%<sup>ABC</sup>

37%<sup>ABC</sup>

In situations that may involve alcohol

9%

15%<sup>A</sup>

13%<sup>A</sup>

28%<sup>ABC</sup>

59%<sup>ABCD</sup>

Levels 3,4 and 5 are currently viewed for longer trips or special situations



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
Base: Total (2264)  
AV9. For each occasion, please select the level(s) of autonomy that you think is the best fit.



# Level 4 Full Autonomy (+ Human) is the “Sweet Spot” of Vehicle Autonomy

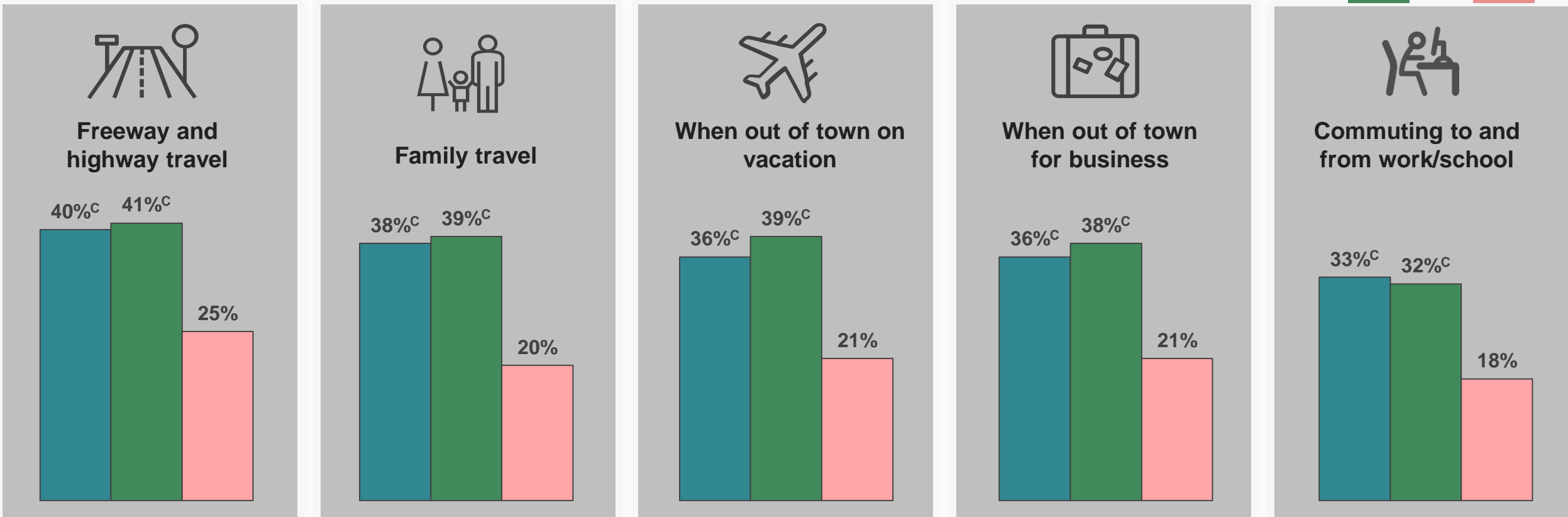


# Within the higher levels of autonomy, Levels 3 Partial Autonomy & 4 Full Autonomy (+ Human) are perceived virtually identically in terms of utility [Level 5 drops off notably]



## Occasion Fit

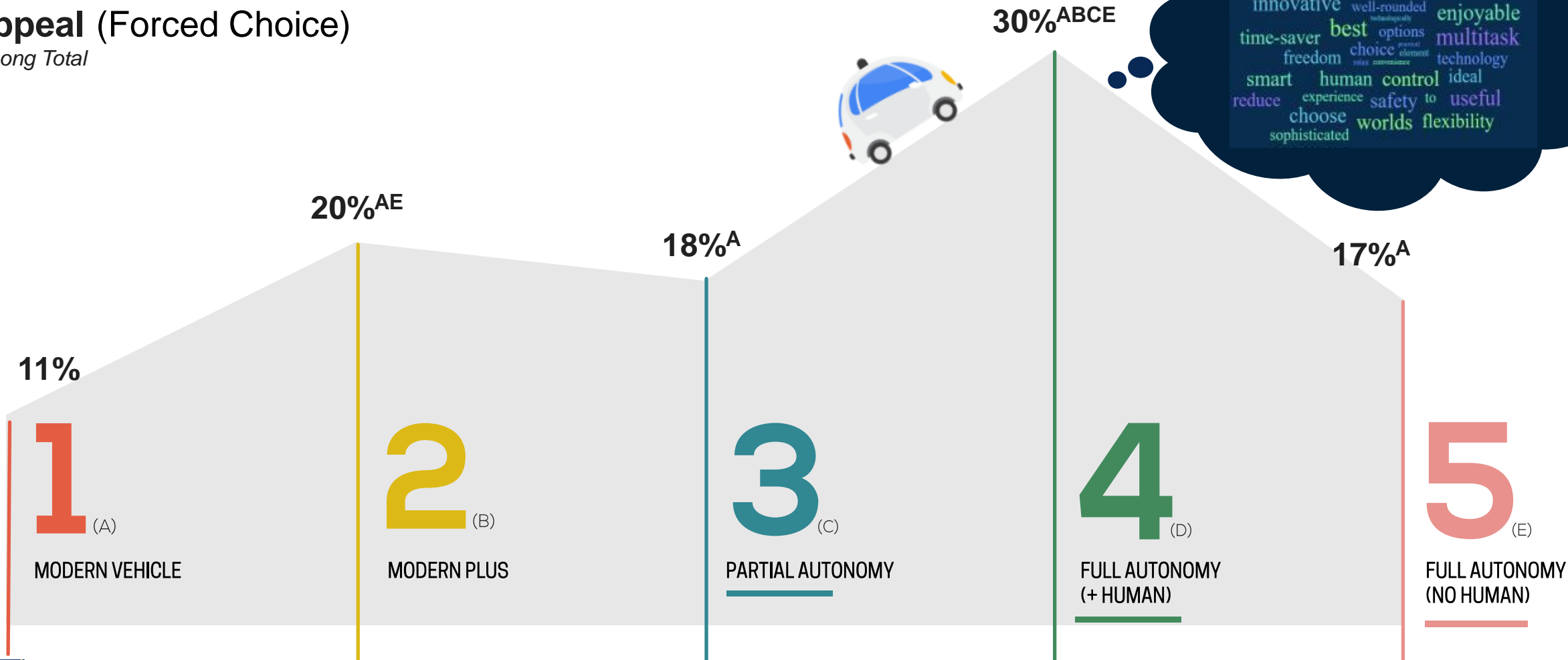
Among Total



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B Base: Total (n=2264) AV9. For each occasion, please select the level(s) of autonomy that you think is the best fit.

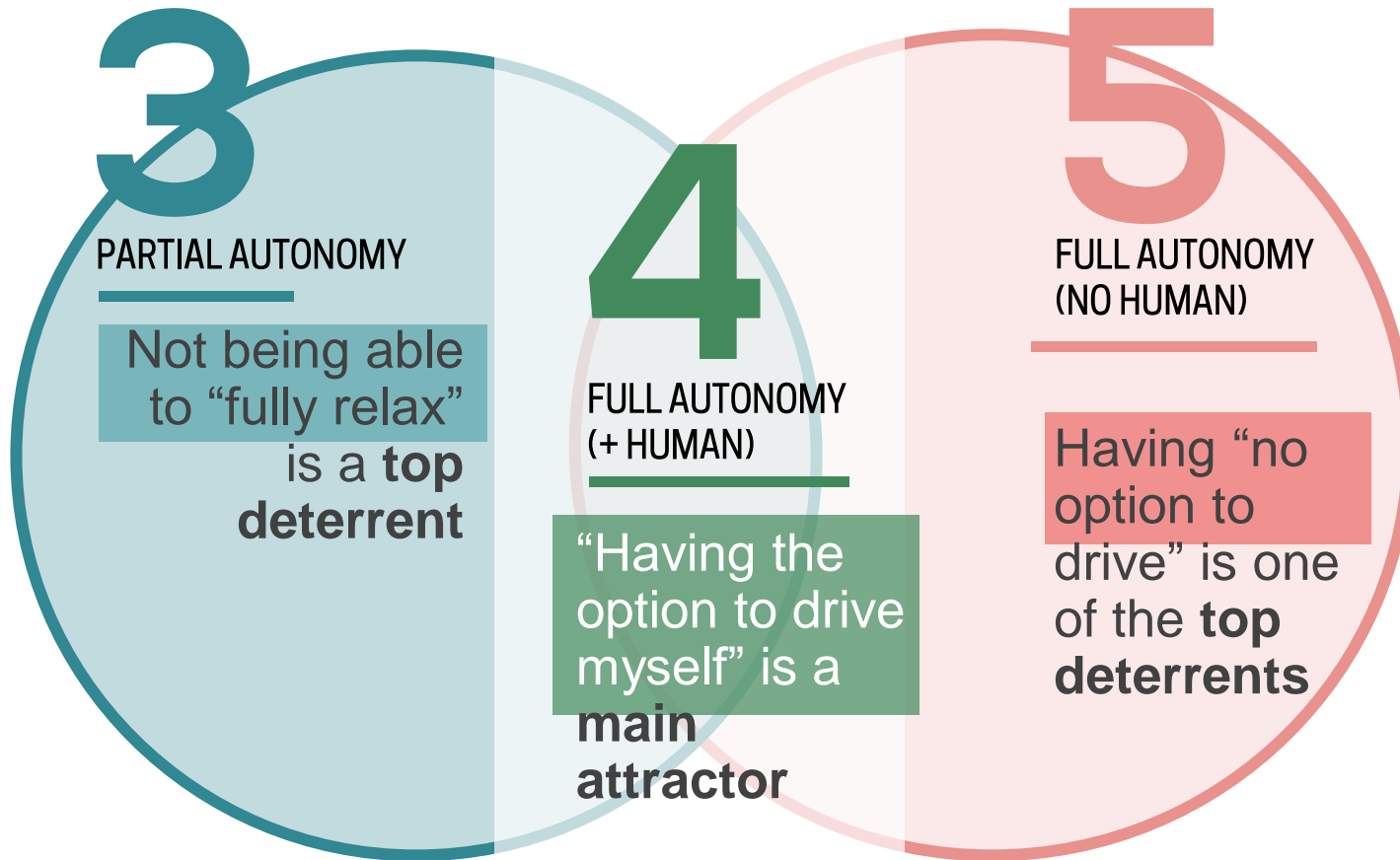
# ➤ However - Level 4 Full Autonomy (+ Human) autonomy is the most appealing

**Appeal (Forced Choice)**  
Among Total



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
 Base: Total (n=2264), Find Level 4 Most Appealing (n=680)  
 AV6. And which level of vehicle autonomy is most appealing to you?  
 AV6A. And why is Level 4 the most appealing?

➤ **Level 4 Full Autonomy (+ Human) hits the “sweet spot” by providing all the benefits of vehicle autonomy without stripping away driver control**



*“It seems to offer the best rounded experience—allows people to not have to drive if they don't want to/can't for any reason (age, sickness, just don't feel like it, unfamiliar area, etc.), yet allows for one to drive if needed or desired.”*

*“It gives me the option to drive or not drive. There are times that it is fun to drive a car—out in the country where you can stop or slow down to look at things. But for a long trip, the full autonomy would be great.”*

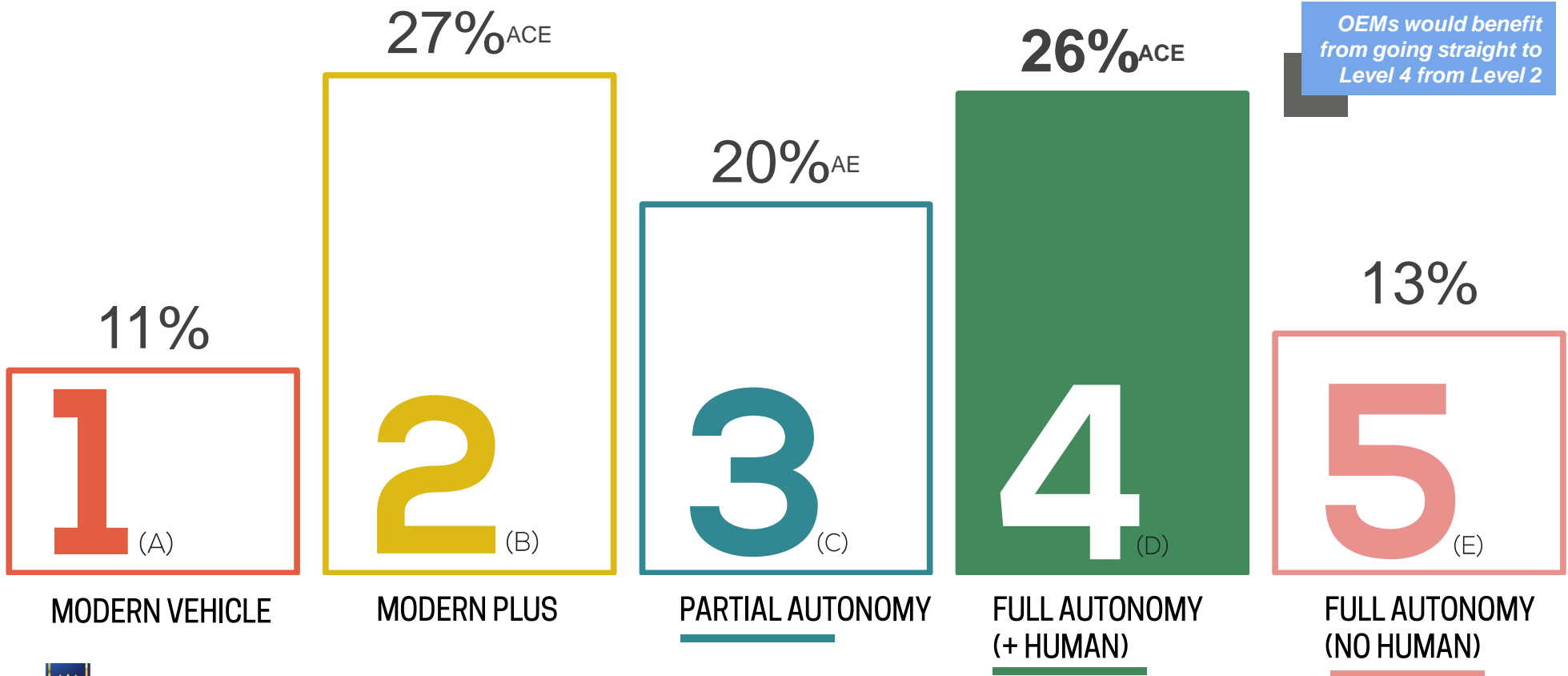
*“Because even though it is chiefly autonomous it still is equipped with seating, a steering wheel and brakes so that a human can take over if needed. Machines are not 100% reliable and we need the human element to fall back on.”*



AV17. Thinking about the different levels of autonomy below, what would deter you from purchasing/leasing a vehicle from each level? Base: Level 3 Those responding (n=2182), Level 5 Total (n=2264)  
L\_3. Please tell us what you like most about each level of autonomy below. Base: Total (n=2264)

# ➤ Americans want to buy Level 4 Full Autonomy (+ Human) as much as vehicles available today

**Purchase Consideration (Forced Choice)**  
*Among Plan to Purchase/Lease Vehicle*



“  
**LEVEL 4**  
 is the most appealing to me because it allows the vehicle to take over all driving tasks for the human, **while still allowing the human to have 'executive control'** in case of emergencies, system errors, or other unforeseen circumstances.”



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
 Base: Plan to Purchase/Lease Vehicle at Some Point (n=1695)  
 AV11. Assuming each level of autonomy was available on the market today, what level of autonomy would you be most likely to purchase/lease?



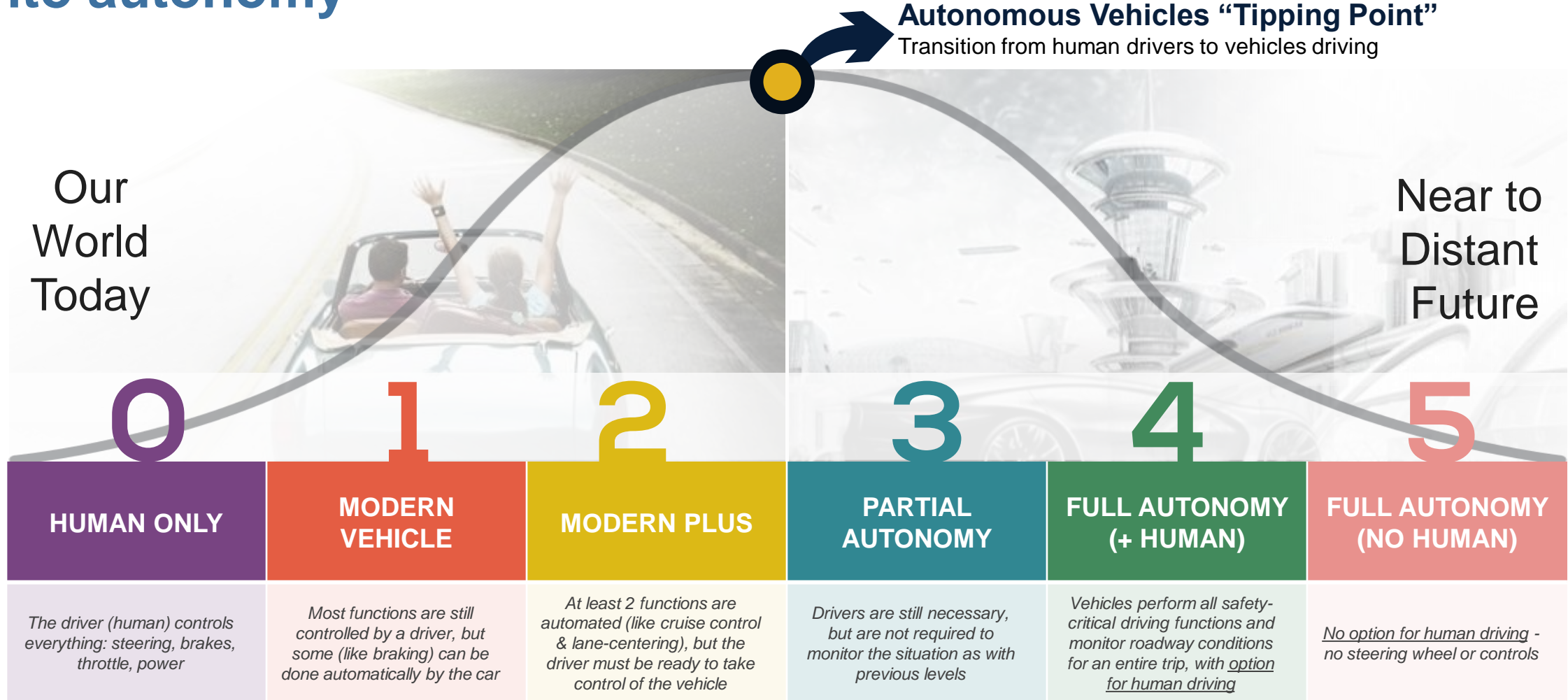
# Experience & Knowledge Will Accelerate Autonomous Vehicle Adoption



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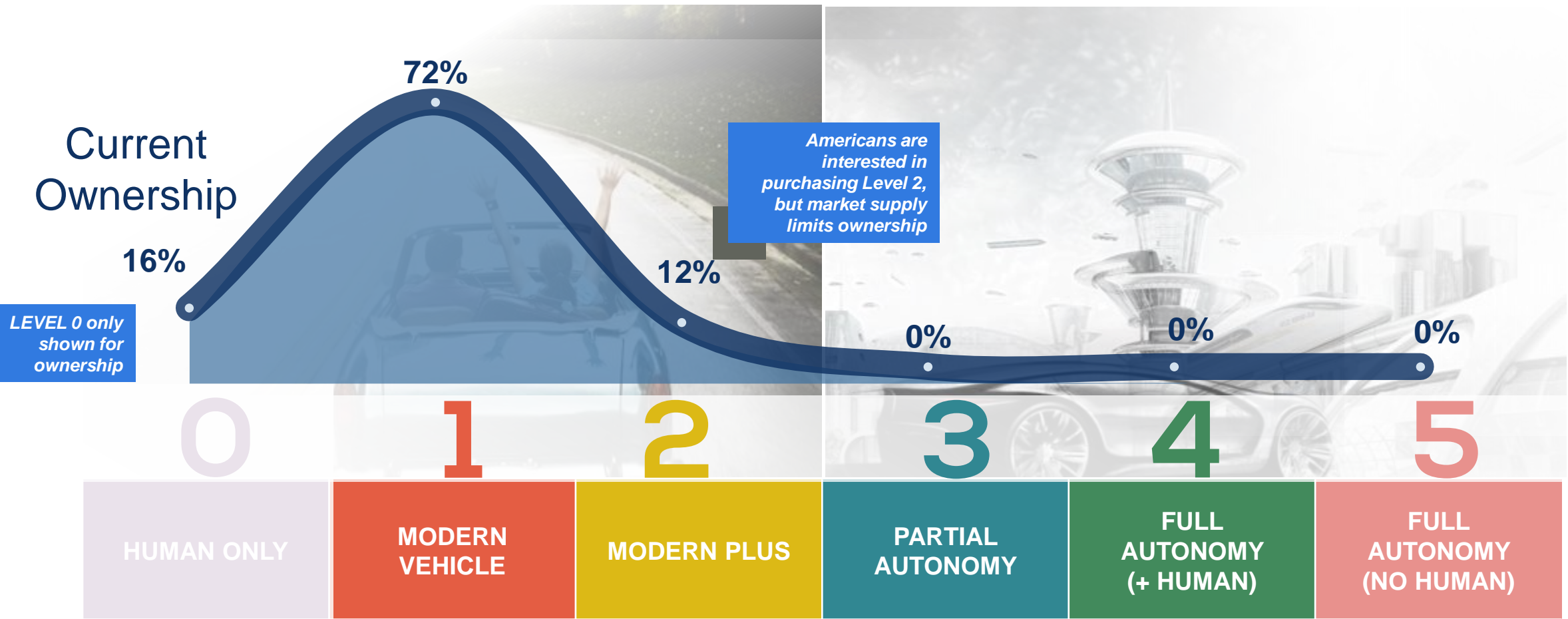
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# ➤ Level 3 Partial Autonomy adoption is when the market "tips" into autonomy





# ➤ The majority of vehicles on the road today are Level 1 Modern Vehicle



Base: Total Currently Own/Lease (n=1550)  
 AV4. Please select what level of vehicle autonomy applies to a car you currently own or lease, or have owned or leased in the past.

# ➤ Perceived expense and fear of software malfunction hold most Americans back from "tipping" into autonomy

## Trial is the biggest catalyst to adoption, after safety and price



### Barriers to Autonomy

3 4 5

	3	4	5
More expensive than can afford	47%	51%	50%
Expensive to fix	44%	46%	48%
Software hack	40%	41%	44%
Software/computer crash	39%	42%	47%
Trust myself to drive more than technology	31%	33%	38%
Concerned about interaction between AV & Non-AV	31%	34%	37%
Can't fully relax	28%	26%	27%
Fearful of vehicles not communicating well	28%	32%	37%
No option to drive	13%	14%	43%



### Catalysts to Autonomy

3 4 5

	3	4	5
Proven/shown to be a safe vehicle	42%	52%	51%
Available in my price range	37%	51%	53%
Insurance company told me my rates would go down	26%	34%	35%
Try technology without fully committing	24%	30%	30%
Tax breaks	22%	29%	28%
It had the most advanced technology	22%	24%	20%
Proven/shown to be more environmentally friendly	18%	20%	19%
Came standard in vehicle I wanted	17%	27%	28%

**FIRST-HAND EXPERIENCE** (like test drives, short-term leasing, or daily rentals) will be crucial in spurring Autonomous Vehicle adoption



Base: Level 2+ Non-Owners for catalysts (n=1573), Total for barriers (n=2264)  
 AV15. Thinking about the different levels of autonomy below, what would encourage you to purchase/lease from each level? (n=2182)  
 AV17. Thinking about the different levels of autonomy below, what would deter you from purchasing/leasing a vehicle from each level?

# ➤ Level 2+ Partial Autonomy Owners are significantly more favorable toward higher levels of Autonomy, and are less likely to think people should always have the option to drive themselves

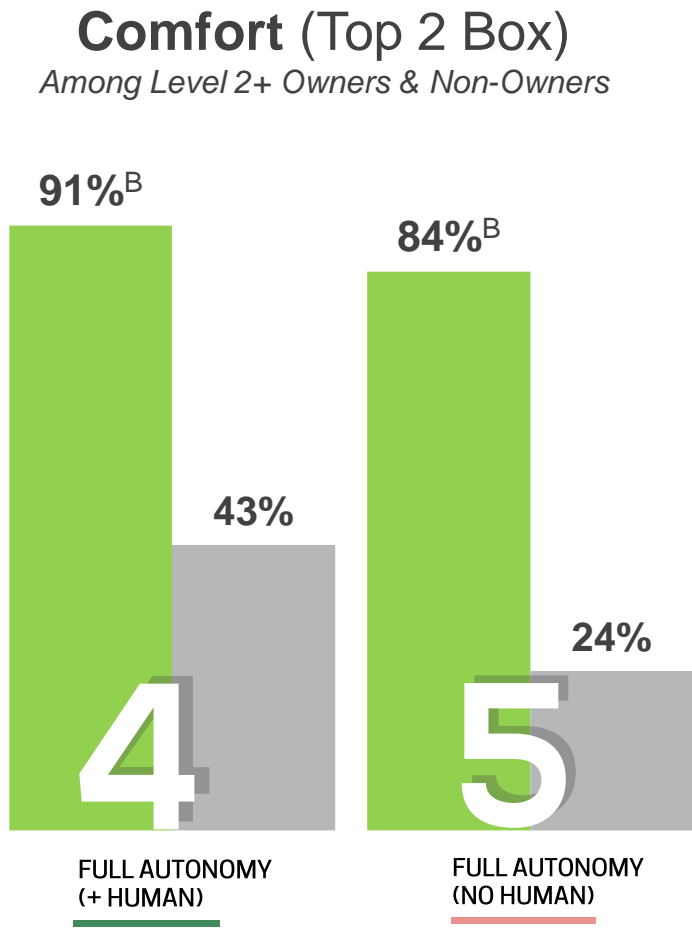
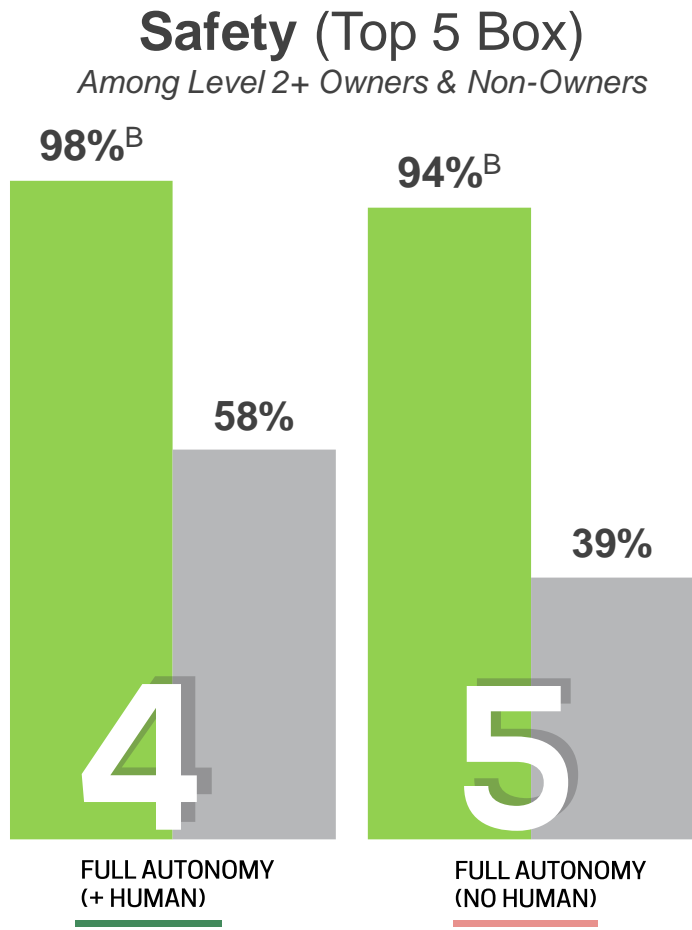
**Level 2+ Owners (A)**

**Level 2+ Non-Owners (B)**

**People should always have the option to drive themselves**

**Level 2+ Owners (A) 54%**

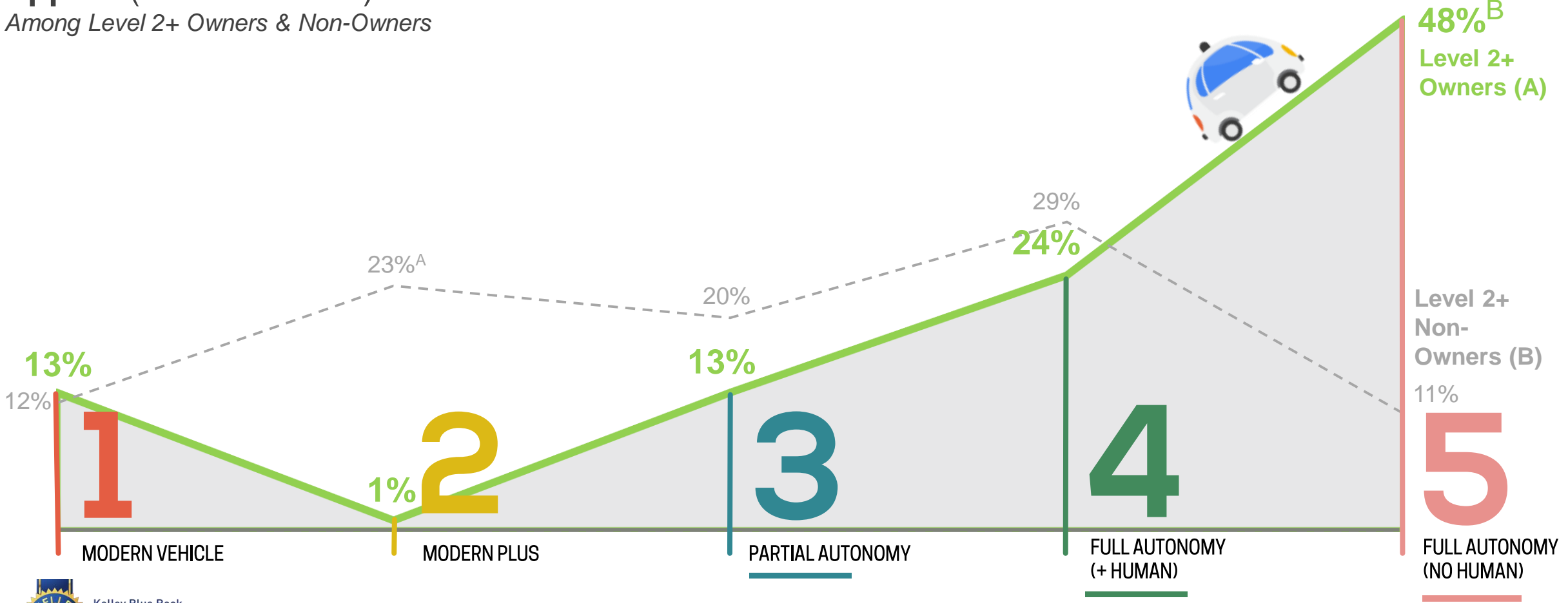
**Level 2+ Non-Owners (B) 85%<sup>A</sup>**



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
 Level 2+ includes those who own vehicles with cutting-edge Autonomous features but haven't quite reached full Level 3 capability (self identified)  
 Base: Level 2+ Owners (n=77), Level 2+ Non-Owners (n=1573)  
 AV7. How safe would you feel travelling in a vehicle at each level of autonomy? AV8. Based on what you've seen, heard, or read, how comfortable are you with each level of vehicle autonomy? ATT1. Below are some statements that people have used to describe their feelings towards Autonomous Vehicles and driving in general. For each pair of statements, please indicate which statement you agree more with.

# ➤ Level 2+ Partial Autonomy Owners find Level 5 (No Human) significantly more appealing than Non-Owners

**Appeal (Forced Choice)**  
 Among Level 2+ Owners & Non-Owners



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
 Level 2+ includes those who own vehicles with cutting-edge Autonomous features but haven't quite reached full Level 3 capability (self identified)  
 Base: Level 2+ Owners (n=77), Level 2+ Non-Owners (n=1573)  
 AV6. And which level of vehicle autonomy is most appealing to you?

# ➤ Tipping point methodology

To project the future automotive landscape, we combined respondents' estimated timing of their next vehicle purchase/lease and the level of autonomy they would be most likely to purchase/lease

**When are you planning to purchase or lease your next vehicle?** (Single Select)

(among current vehicle owners/lessees)

- Within the next year
- Within the next 2 years
- Within the next 3 years
- Within the next 4 years
- Within the next 5 years or more
- I am not planning to purchase/ lease another vehicle at all, ever

**Mean is ~3 years**

$$\begin{array}{l} \text{Current year} \\ \text{Year for projection} \end{array} + \begin{array}{l} \text{Mid 2016} \\ \text{+ 3 years} \end{array} = \begin{array}{l} \text{Avg. yrs until next purchase} \\ \text{= 2020} \end{array}$$

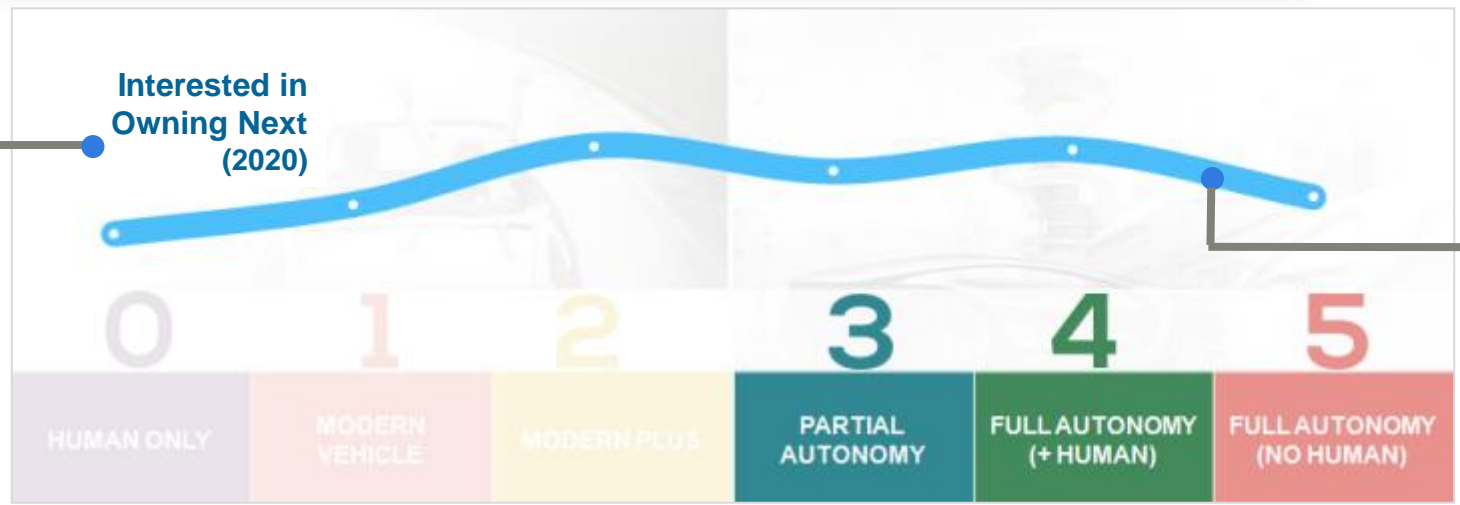
Assuming each level of autonomy was available on the market today, what level of autonomy would you be most likely to purchase/lease?

(Single Select)  
(among those planning to purchase/lease another vehicle)

Level 0 → Level 5

\*Every respondent required to choose a level

**Determining the year for the projection**

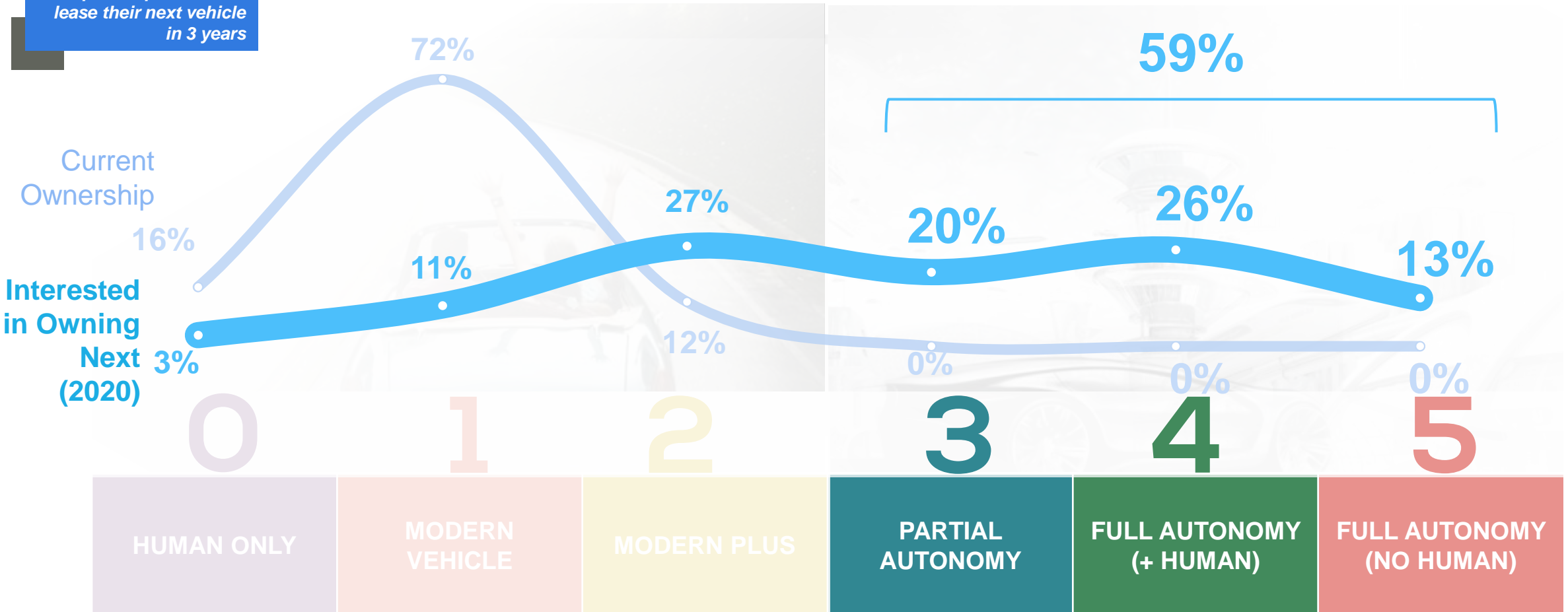


**Calculating the projection line**



# By 2020, assuming all levels of autonomy were available, 59% of consumers would be interested in purchasing/leasing higher levels of autonomy

On average, Americans plan to purchase or lease their next vehicle in 3 years





# Gen Z Are Ready to Get Onboard the Road to Autonomy



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# ➤ Their generation feels as though they are the most educated about Autonomous Vehicles; Boomers feel the least educated

Believe Fully Autonomous Vehicles Will Happen in their Lifetime

67%<sup>BCDEF</sup>

47%<sup>F</sup>

40%<sup>F</sup>

47%<sup>EF</sup>

36%<sup>F</sup>

24%

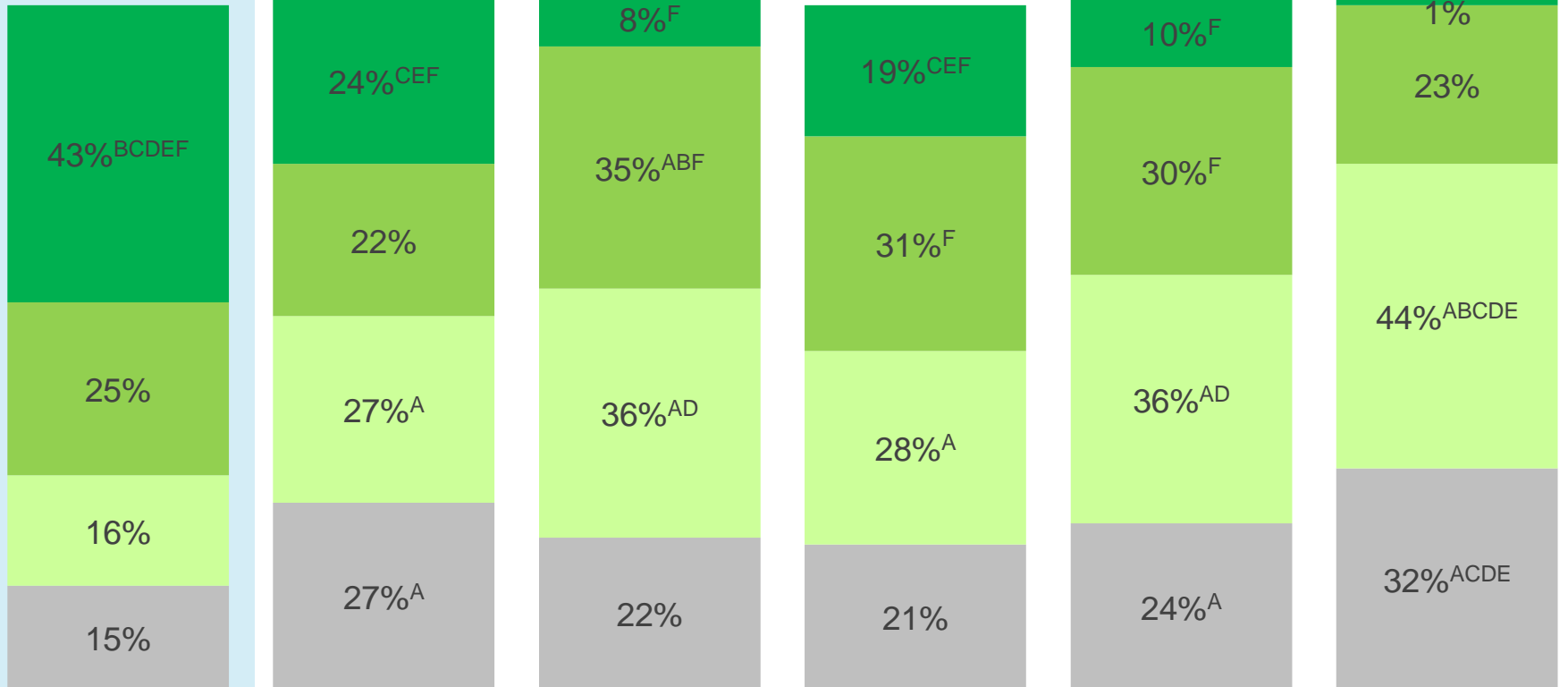
Autonomous Vehicle Knowledge

KNOW "A LOT"

KNOW "SOME"

KNOW "A LITTLE"

KNOW "NOTHING"



(N=194)

(N=78)

(N=316)

(N=430)

(N=616)

(N=630)

YOUNG GEN Z  
12-15 (A)

OLDER GEN Z  
16-17 (B)

YOUNG MILLENNIAL  
18-24 (C)

OLDER MILLENNIAL  
25-34 (D)

GEN X  
35-50 (E)

BABY BOOMERS  
51-64 (F)



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-F  
 Base: By Generation (varies)  
 ATT5. Do you believe all vehicles will be fully autonomous/self-driving in your lifetime?  
 AV2. How much do you know about Autonomous Vehicles?



➤ Pre-driving Young Gen Z don't crave vehicle control like other cohorts

48%

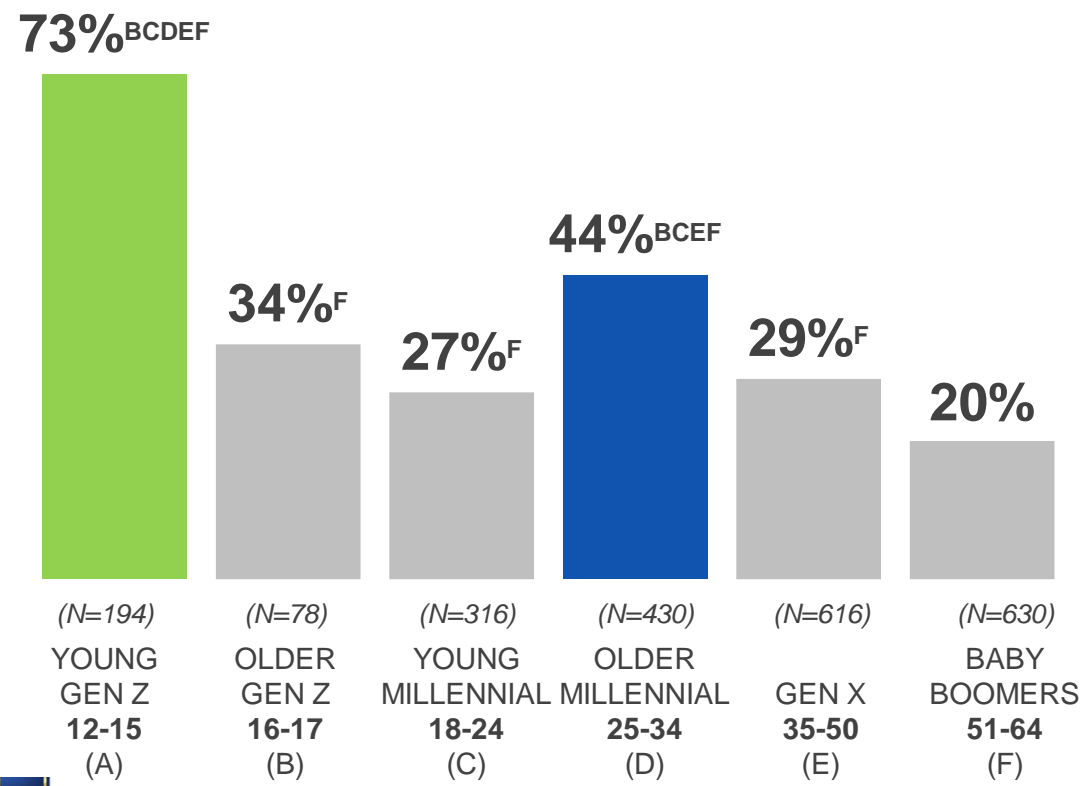
**OF YOUNG GEN Z**

are comfortable letting a vehicle drive them without their control  
(compared to 36% of total — includes Gen Z)

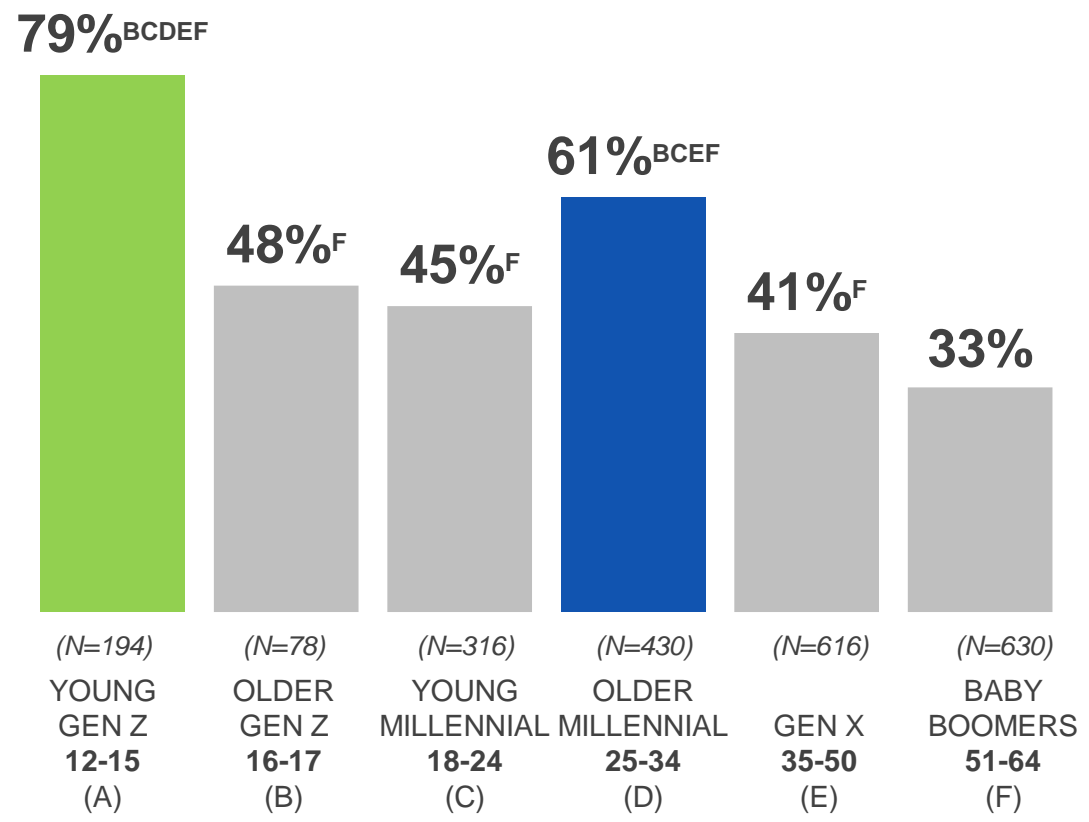


➤ Young Gen Z are the most comfortable and feel safest with the highest level of vehicle autonomy, with Older Millennials, who have actual purchasing power today, are not very far behind

**Level 5 Comfort (Top 2 Box)**  
by Generation



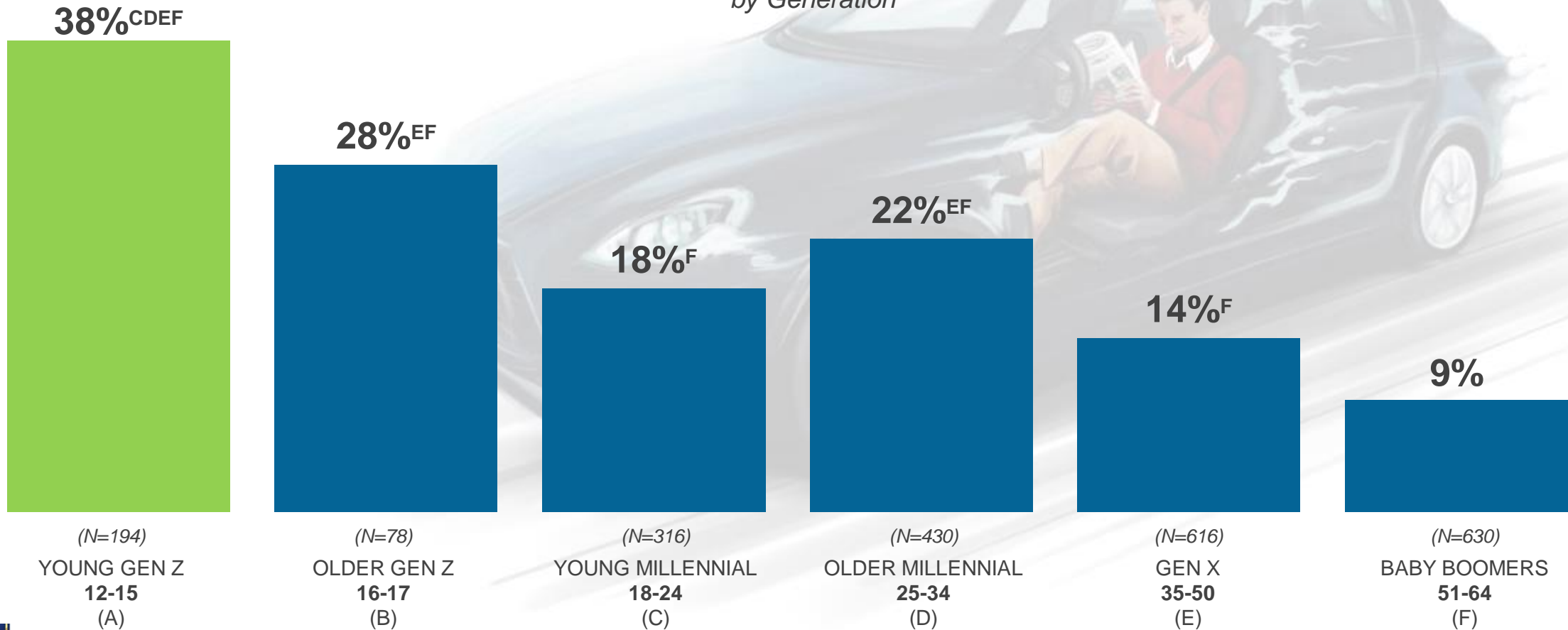
**Level 5 Safety (Top 5 Box)**  
by Generation



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-F  
 Base: By Generation (varies)  
 AV7. How safe would you feel traveling in a vehicle at each level of autonomy?  
 AV8. Based on what you've seen, heard, or read, how comfortable are you with each level of vehicle autonomy?

# Across generations, Level 5 Full Autonomy (No Human) is by far the most appealing to Young Gen Z

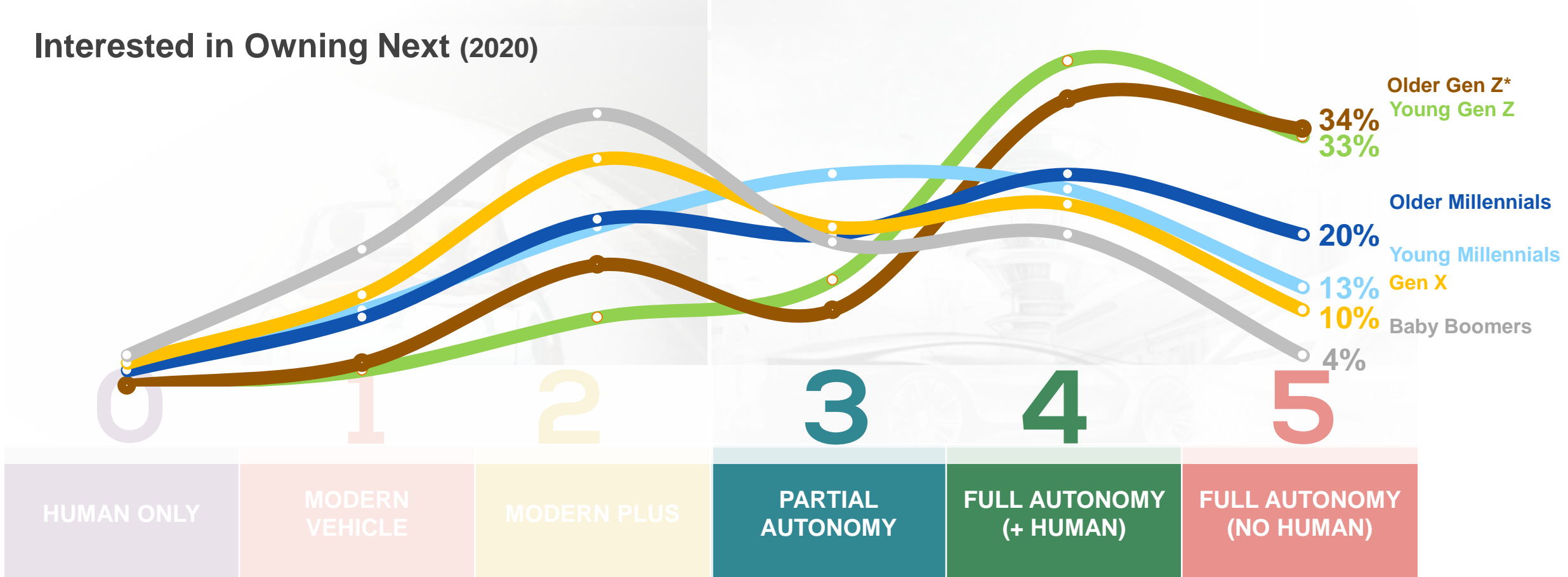
**Level 5 Appeal (Forced Choice)**  
by Generation



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-E  
Base: By generation (varies)  
AV6. And which level of vehicle autonomy is most appealing to you?

# Young Gen Z won't need or experience a tipping point, as they generally would like their first vehicles to be Level 4 Full Autonomy (+ Human) and 5 Full Autonomy (No Human)

Interested in Owning Next (2020)



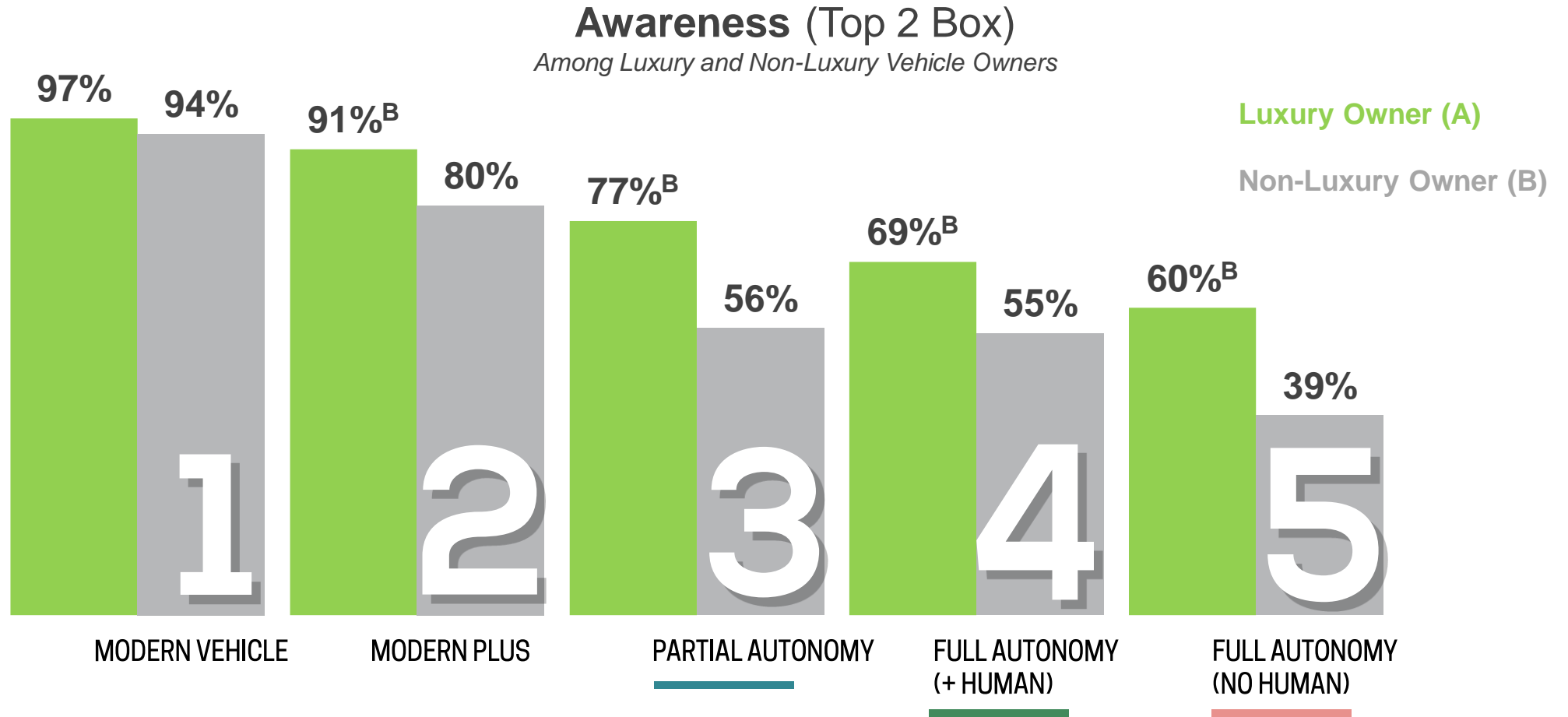
\*Indicates small base size  
 Base: Young Gen Z (n=164), Older Gen Z (n=32\*), Young Millennials (n=206), Older Millennials (n=350), Gen X (n=473), Baby Boomers (n=470)  
 S16. When are you planning to purchase or lease your next vehicle? (n=1770)  
 AV11. Assuming each level of autonomy was available on the market today, what level of autonomy would you be most likely to purchase/lease?



# Luxury Vehicle Owners Are Getting Ready for Autonomy



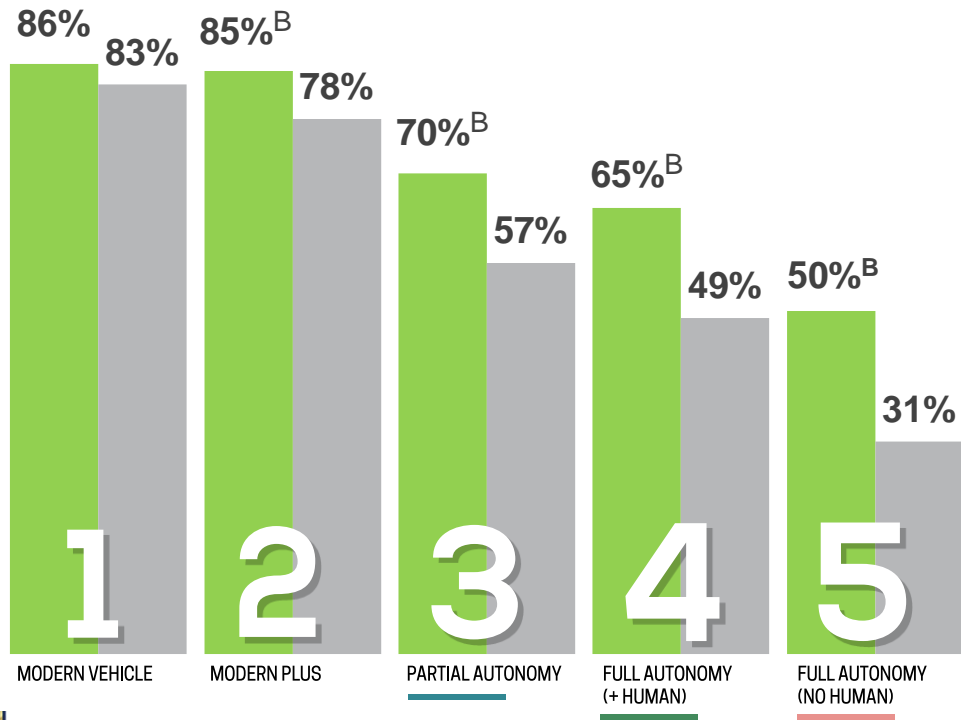
# Luxury Vehicle Owners have more awareness of higher levels of Autonomy versus Non-Luxury Vehicle Owners, particularly for Level 5 Full Autonomy (No Human)



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
Base: Luxury Vehicle Owners (n=184), Non-Luxury Vehicle Owner (n=2080)  
AV4A. What is your familiarity with each level of vehicle autonomy below?

# Compared to Non-Luxury Vehicle Owners, Luxury Vehicle Owners are more comfortable with higher levels of Autonomy, also finding them safer

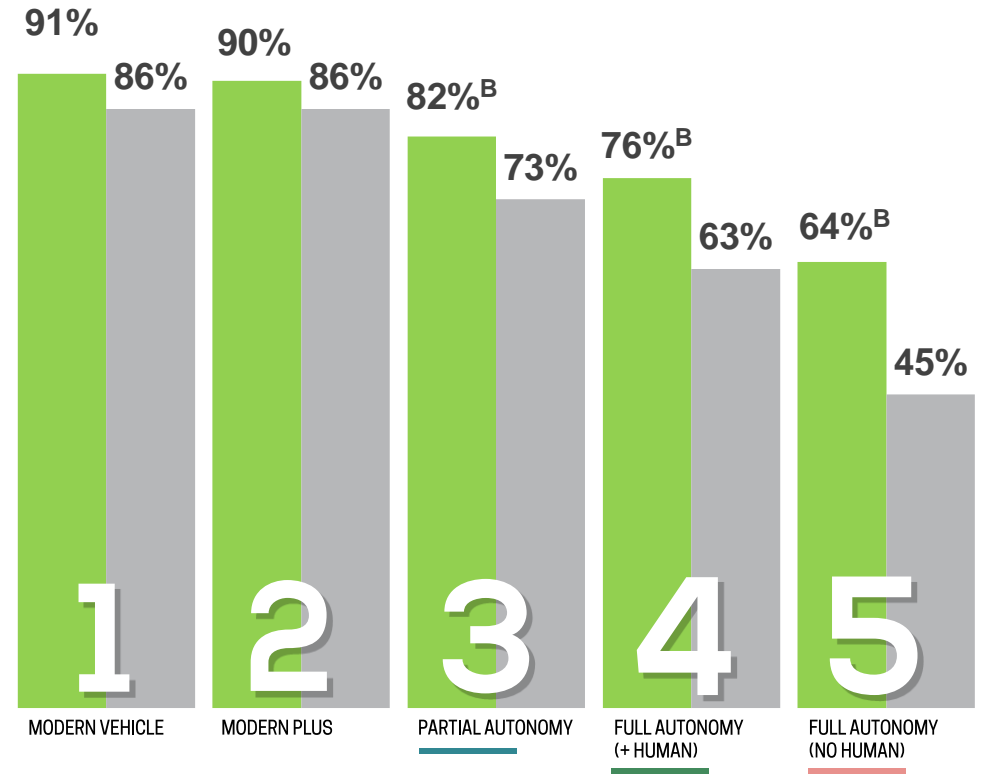
**Comfort (Top 2 Box)**  
Among Luxury and Non-Luxury Vehicle Owners



Luxury Owner (A)

Non-Luxury Owner (B)

**Safety (Top 5 Box)**  
Among Luxury and Non-Luxury Vehicle Owners

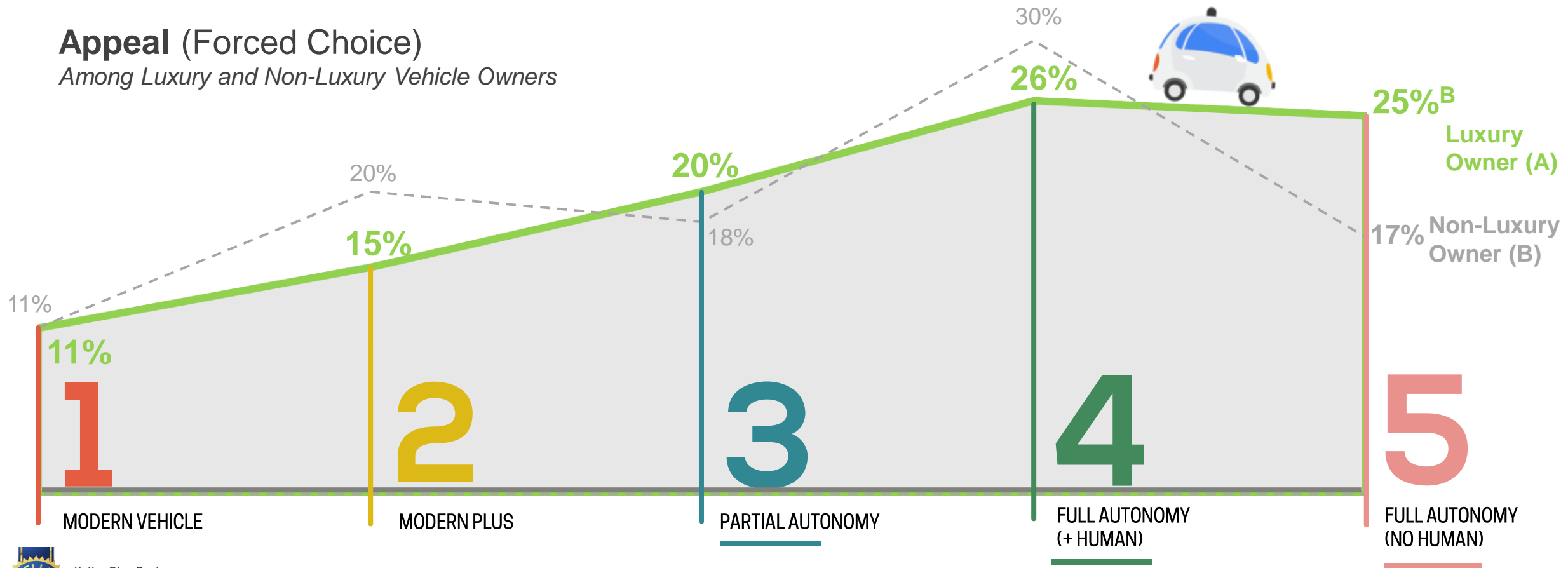


Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
 Base: Luxury Vehicle Owners (n=184), Non-Luxury Vehicle Owner (n=2080)  
 AV7. How safe would you feel traveling in a vehicle at each level of autonomy?  
 AV8. Based on what you've seen, heard, or read, how comfortable are you with each level of vehicle autonomy?

# Level 4 Full Autonomy (+ Human) and Level 5 Full Autonomy (No Human) are equally appealing to Luxury Vehicle Owners, while Non-Luxury Vehicle Owners favor Level 4 Full Autonomy (+ Human)

## Appeal (Forced Choice)

Among Luxury and Non-Luxury Vehicle Owners



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
 Base: Luxury Vehicle Owners (n=184), Non-Luxury Vehicle Owner (n=2080)  
 AV6. And which level of vehicle autonomy is most appealing to you?





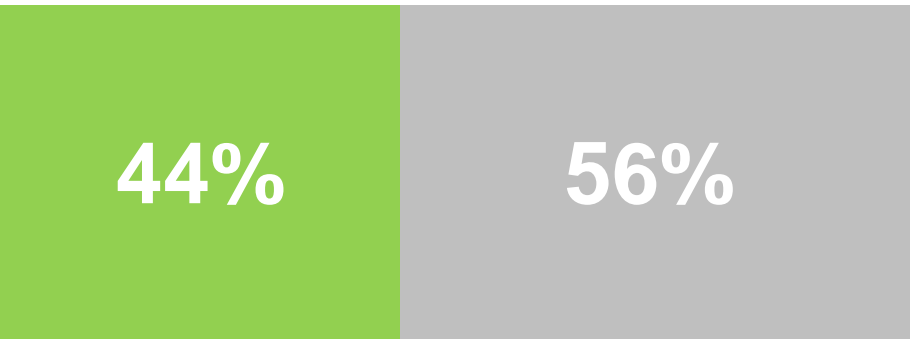
# Americans Are Still Revving Up to the Idea of Autonomous Ride-Sharing Services



Kelley Blue Book  
**KBB.COM**  
The Trusted Resource

# ➤ Americans lean slightly more toward human drivers rather than self-driving vehicles when ride-sharing

I would prefer to use services such as taxis, Uber or Lyft with **self-driving vehicles**



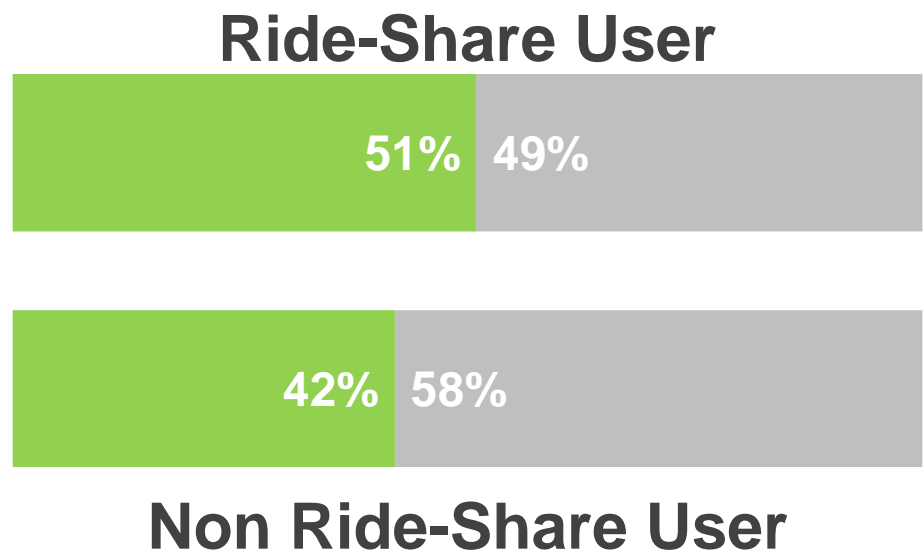

I would prefer to use services such as taxis, Uber or Lyft with human drivers



Base: Total (n=2264)  
ATT1. Below are some statements that people have used to describe their feelings towards Autonomous Vehicles and driving in general. For each pair of statements, please indicate which statement you agree with more.

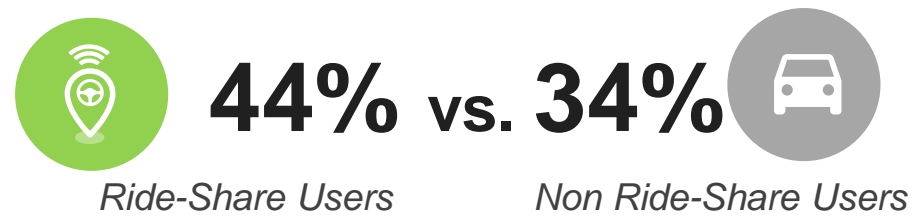
# However, those who already use ride-sharing services are more likely to give autonomous ride-sharing vehicles a chance versus their counterparts

I would prefer to use services such as taxis, Uber or Lyft with **self-driving vehicles**







I would prefer to use services such as taxis, Uber or Lyft with **human drivers**

Ride-Share Users are **significantly more comfortable letting a vehicle drive** them without their control versus Non Ride-Share Users

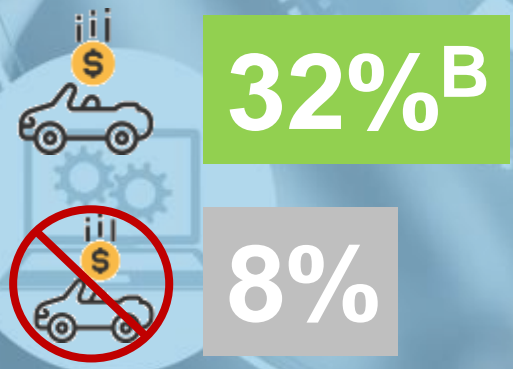


➤ Not only are Ride-Share Users more knowledgeable about Autonomous Vehicles, but they are more favorable toward higher levels of autonomy

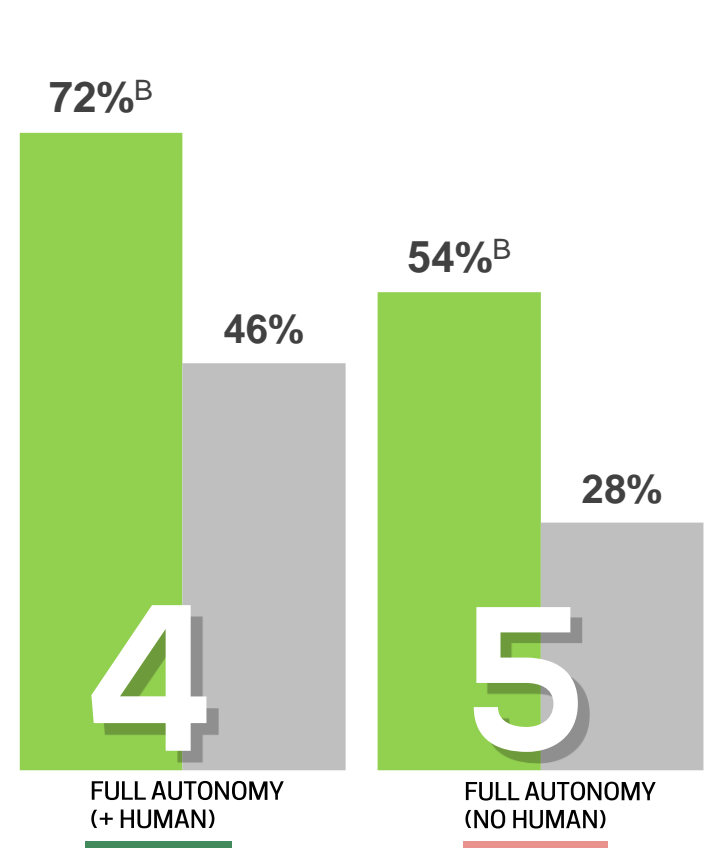
 **Ride Share Users (A)**

 **Non-Ride Share Users (B)**

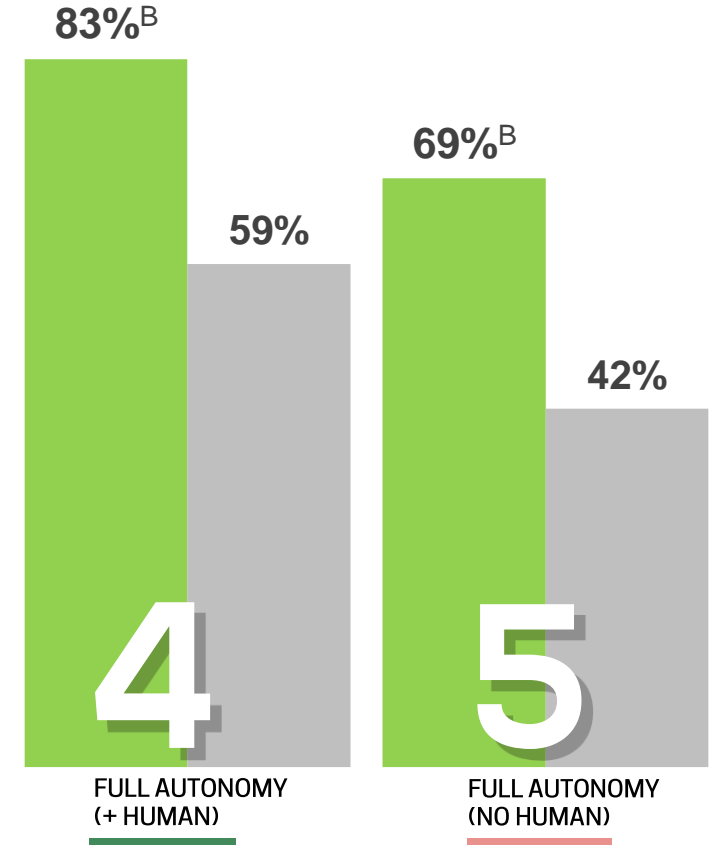
**Know a lot about Autonomous Vehicles**



**Comfort (Top 2 Box)**  
Among Ride Share Users & Non-Users



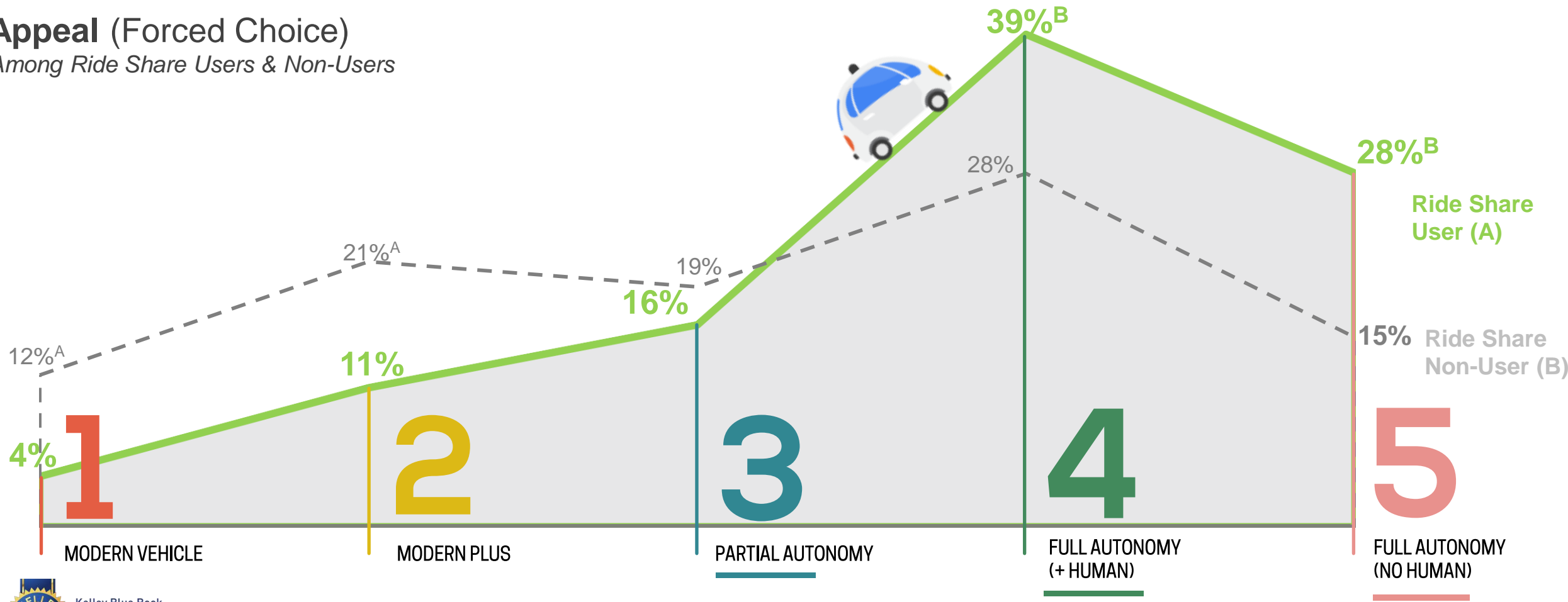
**Safety (Top 5 Box)**  
Among Ride Share Users & Non-Users



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
 Base: Ride Share User (n=405), Ride Share Non-User (n=1859)  
 AV2. How much do you know about Autonomous Vehicles?  
 AV7. How safe would you feel travelling in a vehicle at each level of autonomy?  
 AV8. Based on what you've seen, heard, or read, how comfortable are you with each level of vehicle autonomy?

➤ Both Ride-Share Users and Non-Users find Level 4 Full Autonomy (+Human) the most appealing, but Ride-Share Users are significantly more likely to do so. They are also almost twice as likely to pick Level 5 Full Autonomy (No Human) as most appealing.

**Appeal (Forced Choice)**  
Among Ride Share Users & Non-Users



Please Note: Capital letters indicate statistical differences at the 95% confidence level: A-B  
Base: Ride Share User (n=405), Ride Share Non-User (n=1859)  
AV6. And which level of vehicle autonomy is most appealing to you?

## What's the story around Autonomous Vehicles?

- 1** On the road to autonomy, interest peaks with Level 4 Full Autonomy (+ Human) as it offers the best of both worlds – a fully Autonomous Vehicle that still provides the option to drive
- 2** With most Americans living in a Level 1 Modern Vehicle world, Autonomous Vehicles are still a novel and almost foreign concept
- 3** Americans will need convincing to reach a Level 5 Full Autonomy (No Human) future
- 4** A quarter of Americans are enthusiastic about Autonomous Vehicles and show interest in purchasing higher levels of autonomy
- 5** Experiencing higher levels of autonomy first-hand is a key to “tipping” into an autonomous future
- 6** Young Gen Z and Luxury Owners are excited about and ready for an autonomous future

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Thank You!



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