



REACHING ZERO CRASHES

6-5-4-3-2-1-0

*A DIALOGUE ON THE ROLE OF
ADVANCED DRIVER ASSISTANCE SYSTEMS*

OCTOBER 27 | 2016



**National
Transportation
Safety Board**

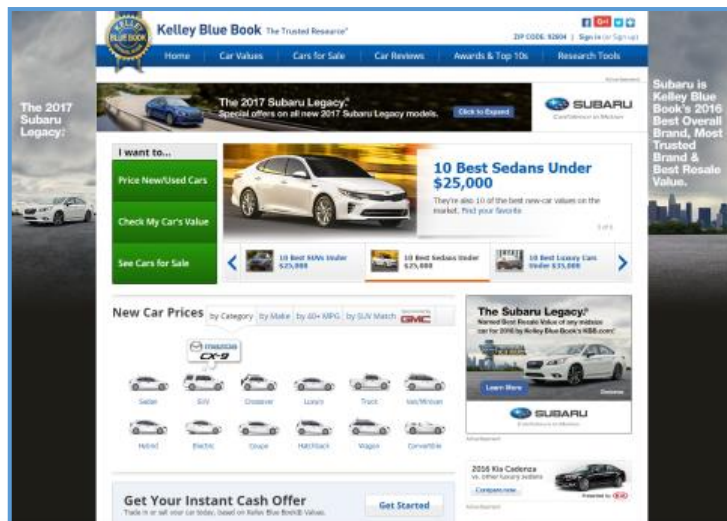




Advanced Driver-Assist Safety Technologies: Educating Consumers Through Online Media

Prepared for NTSB
October 27, 2016
Washington, DC

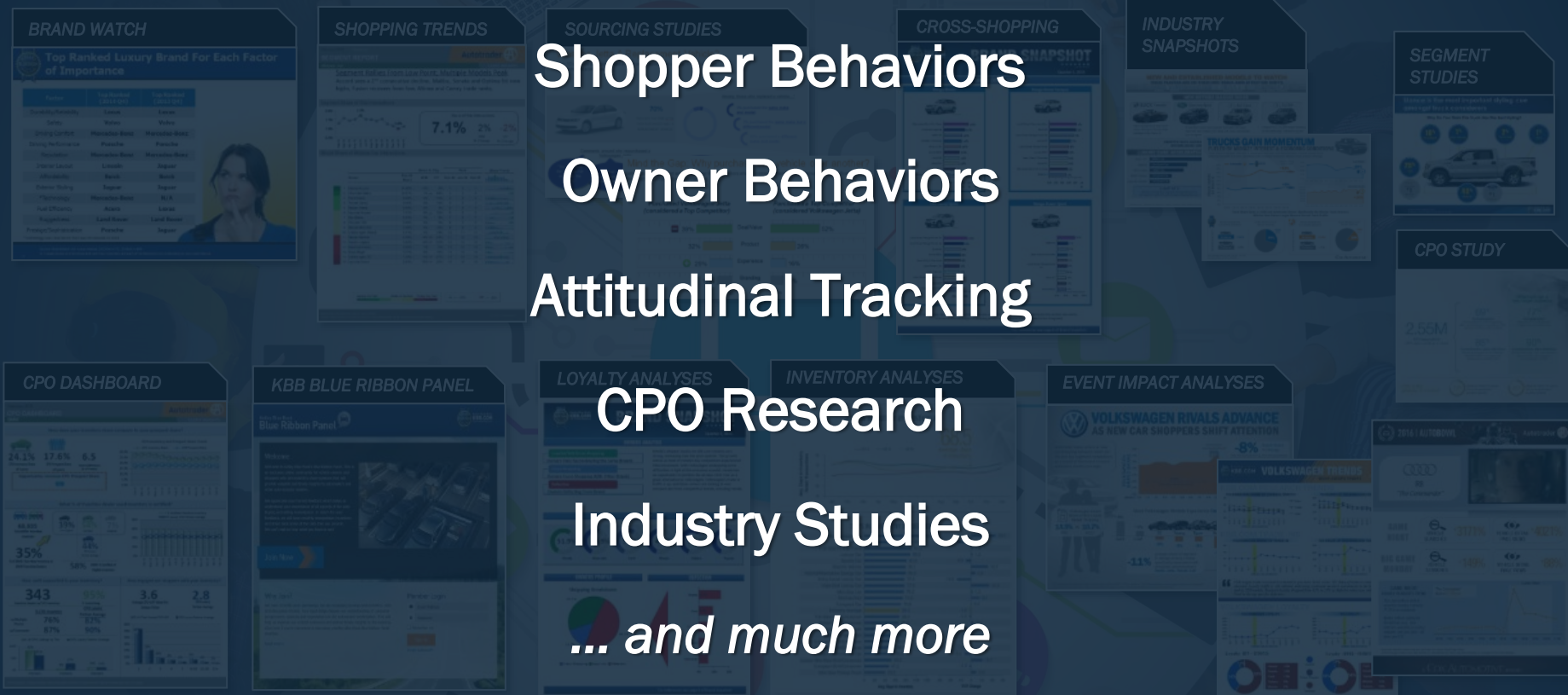
We leverage our audience to understand consumer attitudes and behaviors



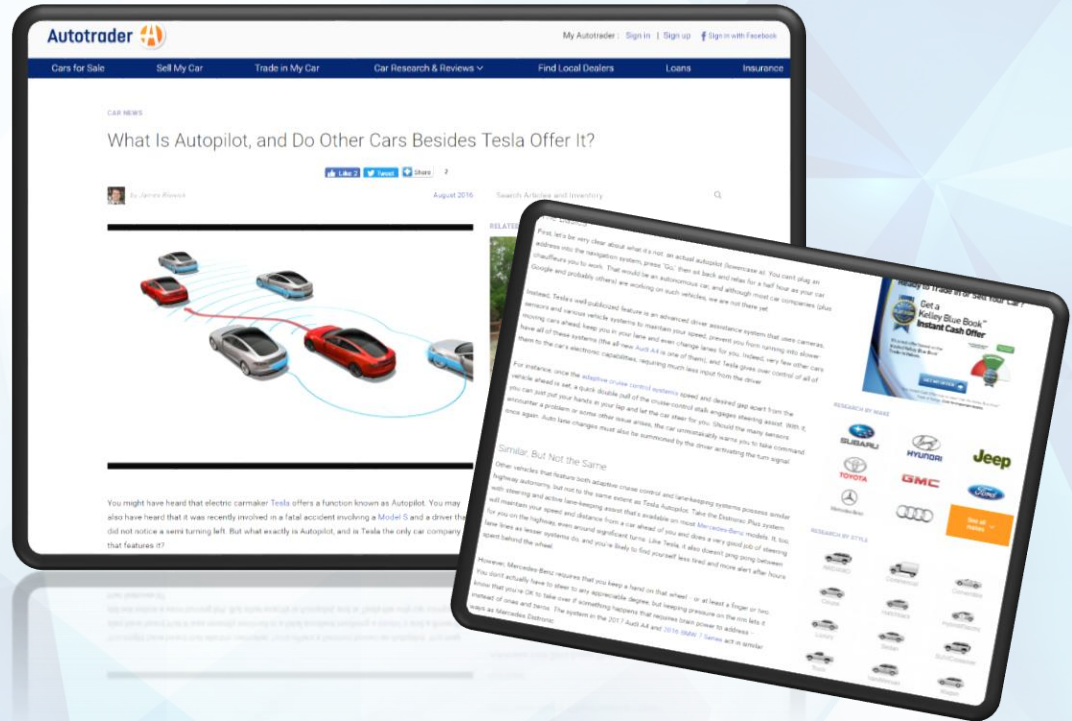


The Power of Cox Automotive Insights

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... and much more



Kelley Blue Book and Autotrader provide consumers with continuously updated information regarding in-vehicle technology





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KBB study finds American drivers still prefer a hands-on approach

By Bob Nagy on September 28, 2016 11:29 AM

A new national study commissioned by Kelley Blue Book has found that despite all of the efforts being made today towards advancing self-driving technology, American motorists are not exactly racing to embrace it. According to the 2016 Kelley Blue Book Future Autonomous Vehicle Driver Study, the majority of Americans still believe their conventional cars are significantly safer than those with higher levels of autonomy. It also discovered that 62 percent of today's drivers don't believe they'll live long enough to see a world where all vehicles are fully autonomous. However, it did find 67 percent of Gen Z pre-drivers (ages 12-15) do expect to be around to see the transition happen and that 79 percent of this tech-savvy group felt self-driving cars would provide the greatest level of overall safety.

Personal control versus collective safety

According to the study, current U.S. drivers are conflicted on the question of personal control versus collective safety for all as it pertains to self-driving vehicles, with 51 percent favoring the former and 49 percent prioritizing the latter. However, 64 percent of respondents stated they prefer to be in full control of a vehicle at all times while 80 percent want the option to take command whenever they so choose. That said, 63 percent of those surveyed also believed that our roads would be safer if autonomous vehicles were standard-issue.

The Society of Automotive Engineers currently recognizes six levels of vehicle autonomy, ranging from zero (none) to five (full, with no human input). The KBB study found that consumer interest is currently greatest for Level 4 technology—which offers full autonomy with the possibility for human input—and that if all levels of autonomy were available by 2020, 59 percent of respondents said they'd be likely to buy a vehicle equipped with Level 3 or higher tech. Not surprisingly, firsthand experience also was found to be a key factor in fostering interest and acceptance among consumers for all forms of autonomous operation.

A new study from Kelley Blue Book shows how Americans' affinity for driving could slow the adoption of driverless vehicle technology in the United States. Rather than fully autonomous vehicles, Americans prefer cars equipped with self-driving...

Driverless future? Not so fast say Americans [video]
The Valley Town Crier - Oct 3, 2016
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Study: Consumers aren't excited about self-driving cars
The Detroit News - Oct 2, 2016
A new study from Kelley Blue Book shows how Americans' affinity for driving could slow the adoption of driverless vehicle technology in the United States. Rather than fully autonomous vehicles, Americans prefer cars equipped with self-driving...

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Hill Country Journal - Oct 2, 2016
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The Statesman - Oct 1, 2016
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Bellingham Herald - Oct 1, 2016
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Survey Finds Four Out of Five Want Driver Control in Autonomous ...
Hybrid Cars News - Sep 28, 2016
Eighty percent of surveyed consumers don't want to own a car in the ... not really ready for a fully autonomous vehicle," said Rebecca Lindland, ...
Study: Consumers want option to control autonomous cars
The Detroit News - Sep 28, 2016
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Driverless future? Not so fast say Americans
Washington Post - Sep 28, 2016
Rather than fully autonomous vehicles, Americans prefer cars ... where we are retrofitting everything here in the states," said Rebecca Lindland, ...
Do Americans really want self-driving cars?
Christian Science Monitor - Sep 28, 2016
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Nevada Issues Historic License to Paralyzed Race Car Driver
TechNewsWorld - Oct 7, 2016
... Blue Book Senior Analyst Rebecca Lindland told TechNewsWorld ... The autonomous vehicle is not permitted to drive in snow or ice, and the ...



One-third of drivers say they'll never buy fully autonomous cars
New York Post - Sep 28, 2016
Sixty-two percent of respondents said they don't think all vehicles will ... there yet," Rebecca Lindland, a senior analyst for Kelley Blue Book, ... "Consumers are not necessarily looking for a fully autonomous vehicle," Lindland ...



Driverless future? Not so fast say many Americans
Chicago Daily Herald - Oct 8, 2016
Rather than fully autonomous vehicles, Americans prefer cars ... where we are retrofitting everything here in the states," said Rebecca Lindland, ...



Americans are skittish about drones delivering their packages
The News Journal - Oct 15, 2016
Whether it's drones, self-driving cars or even the Internet, the less someone ... have found that those with partly autonomous vehicles — a Tesla with autopilot, ... "Familiarity breeds desire," Rebecca Lindland, senior director of ...



How people actually get on board with new technologies
Washington Post - Oct 12, 2016
Whether it's drones, self-driving cars or even the Internet, the less someone has ... found that those with partly autonomous vehicles — a Tesla with autopilot, ... "Familiarity breeds desire," Rebecca Lindland, senior director of ...



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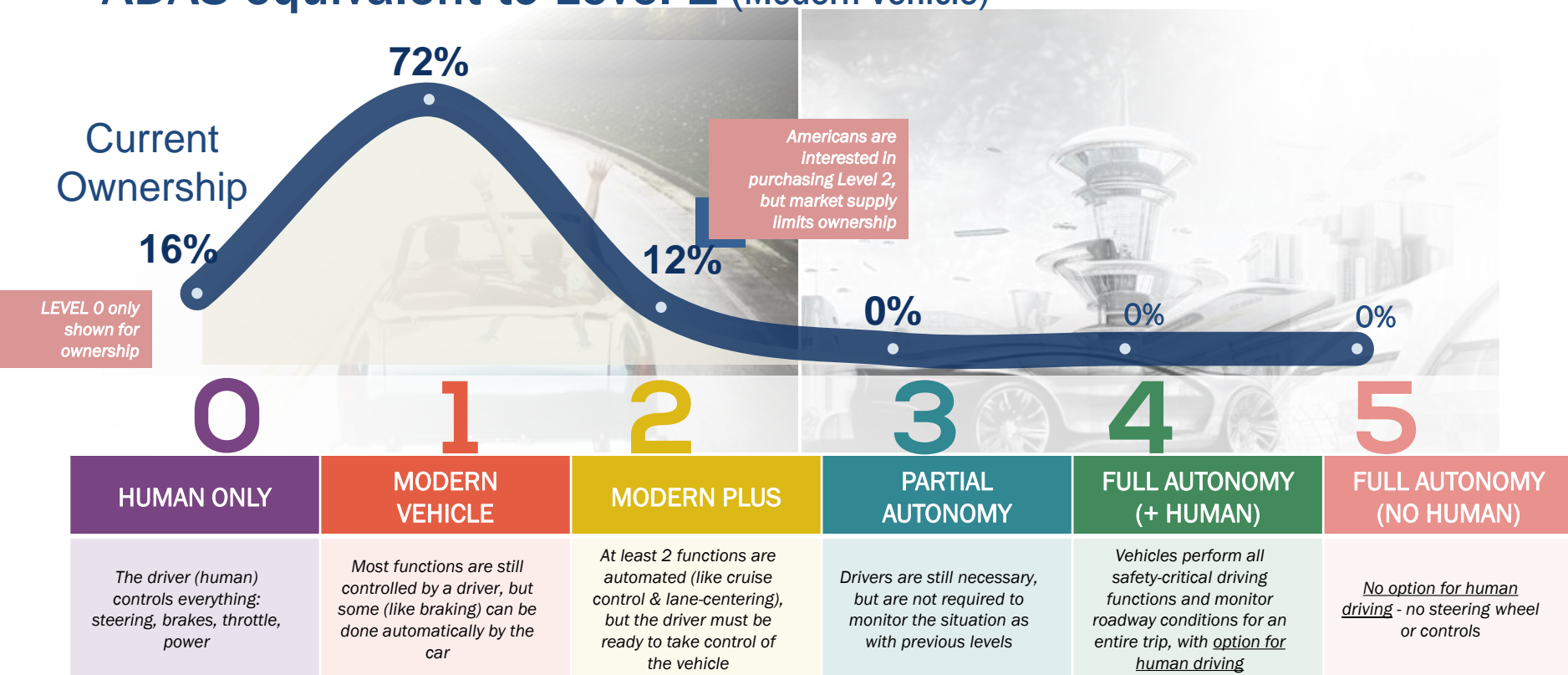
IN-VEHICLE TECHNOLOGY

Topline Report





The majority of vehicles on the road today are equipped with ADAS equivalent to Level 1 (Modern Vehicle)

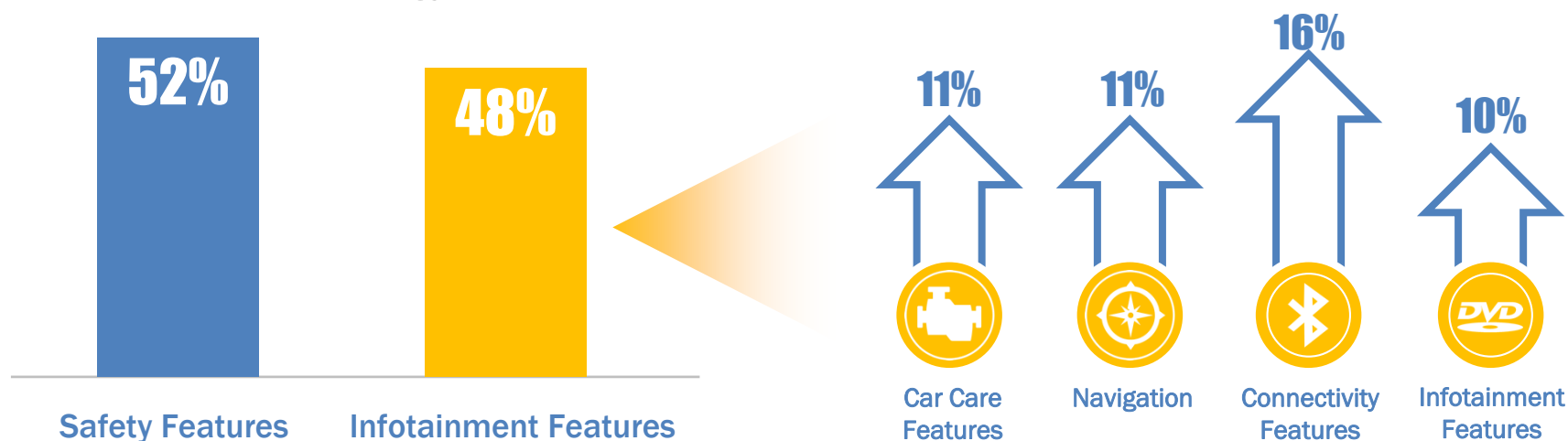


Base: Total Currently Own/Lease (n=1550)

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.

Consumers Are Split Between Safety And Infotainment When Defining In-Vehicle Technology

Which of The Following Best Represents In-Vehicle Technology to You?

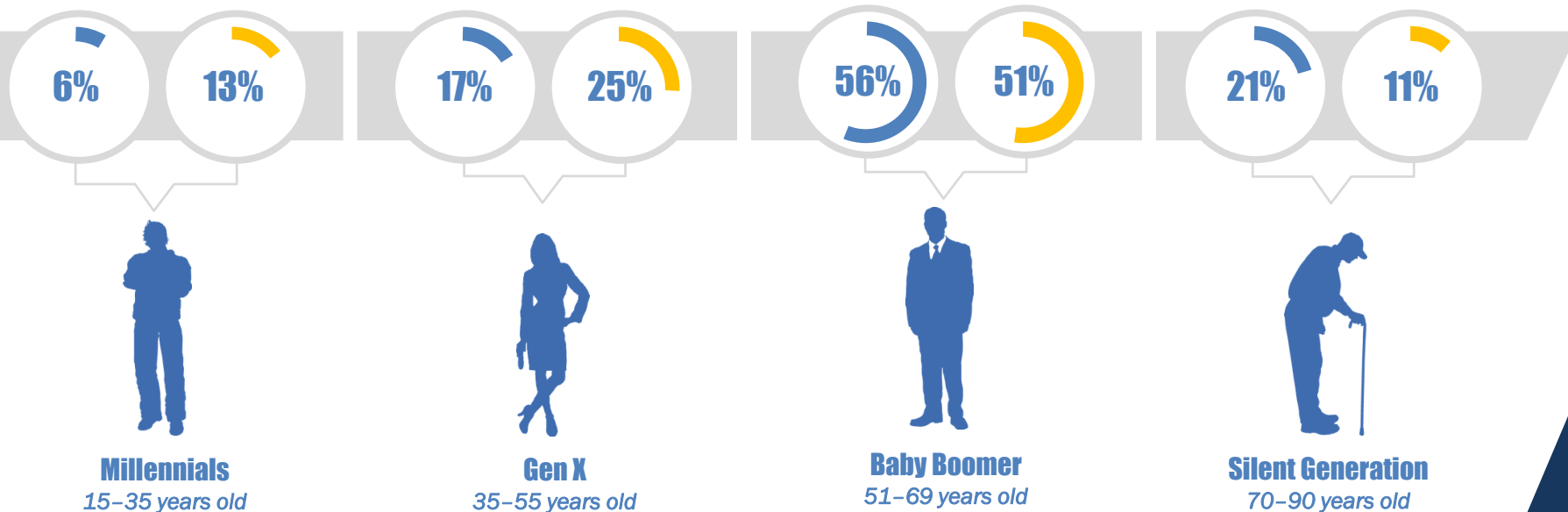


Q: Which of the following best represents in-vehicle technology to you?
In-Vehicle Tech Survey
N = 2076

Young Shoppers Associate In-Vehicle Technology With Infotainment Features

Which of The Following Best Represents In-Vehicle Technology to You?

● Safety Features ● Infotainment Features

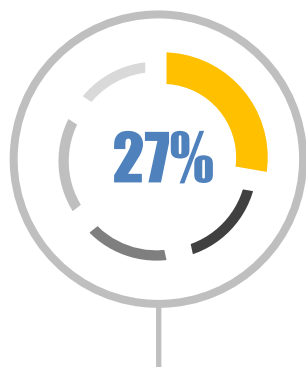


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In-Vehicle Tech Survey N = 2076

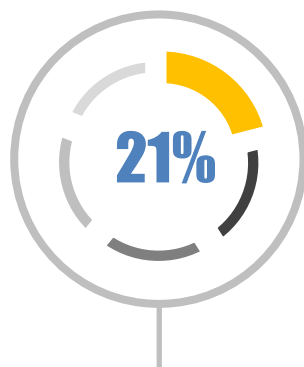
Safety Features Are Most Important When Considering A New Vehicle

When Are Certain Features Considered?

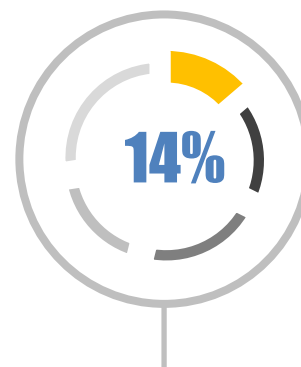
● Safety ● Navigation ● Entertainment ● Connectivity ● Car Care



When I'm First
Researching



When I'm Narrowing Down
The List I'm Considering



After I Visit
The Dealers

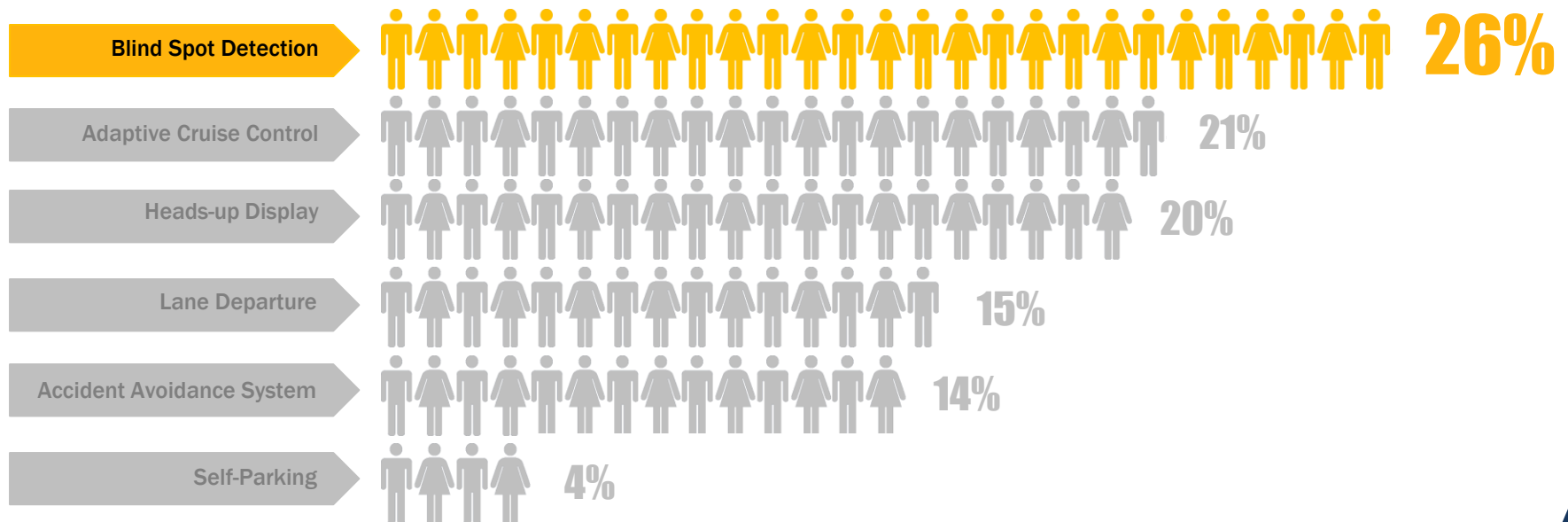


Never

Q: In your shopping process, when would you consider each of the following?
In-Vehicle Technology Survey
N = 2076

64% Of People Have Never Experienced These Safety Features.

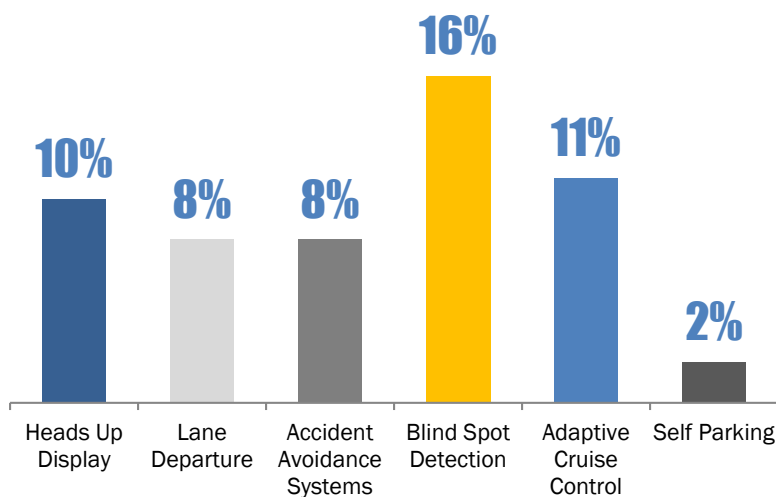
When Are Certain Features Considered?



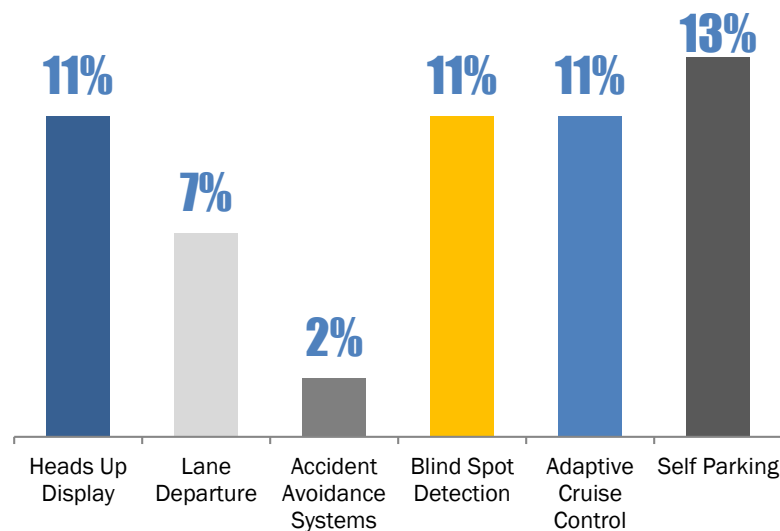
Q: Have you ever driven a car with any of the following safety features?
In-vehicle Tech Survey
N = 737

People Who Think “Technology” Means “Safety” Are More Likely To Have Experience With Safety Features

Safety Features



Infotainment Features



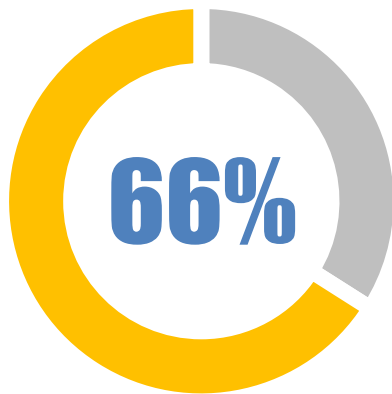
Q: Have you ever driven a car with any of the following safety features?
Q: Which of the following best represents in-vehicle technology to you?
In-vehicle Tech Survey
N Safety = 1435, N Infotainment = 1216



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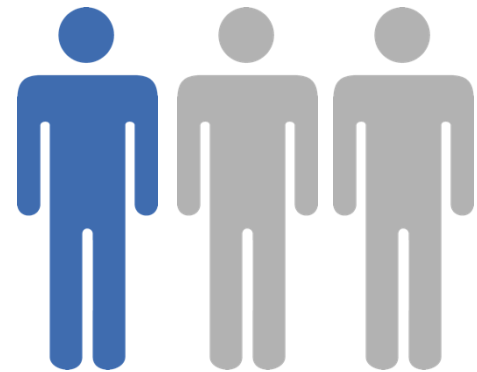
For 1 In 3 People, Technology Is “Make Or Break” When Choosing A Car

When Choosing The Car I Will Purchase



Any Technology That Comes in the Car is an Added Bonus

1 In 3 People



Technology Features in the Car Will Make or Break My Decision

Q: When choosing the car I will purchase...
In-Vehicle Technology Survey
N = 2076

Common Tech Items Are Most Important When Shopping For A New Vehicle

Very Important

Back-up Camera

USB/Auxiliary Port

Bluetooth

Remote keyless entry

Neutral

Blind Spot Detector

Navigation

Push to Start

4G LTE hotspot

Remote engine start

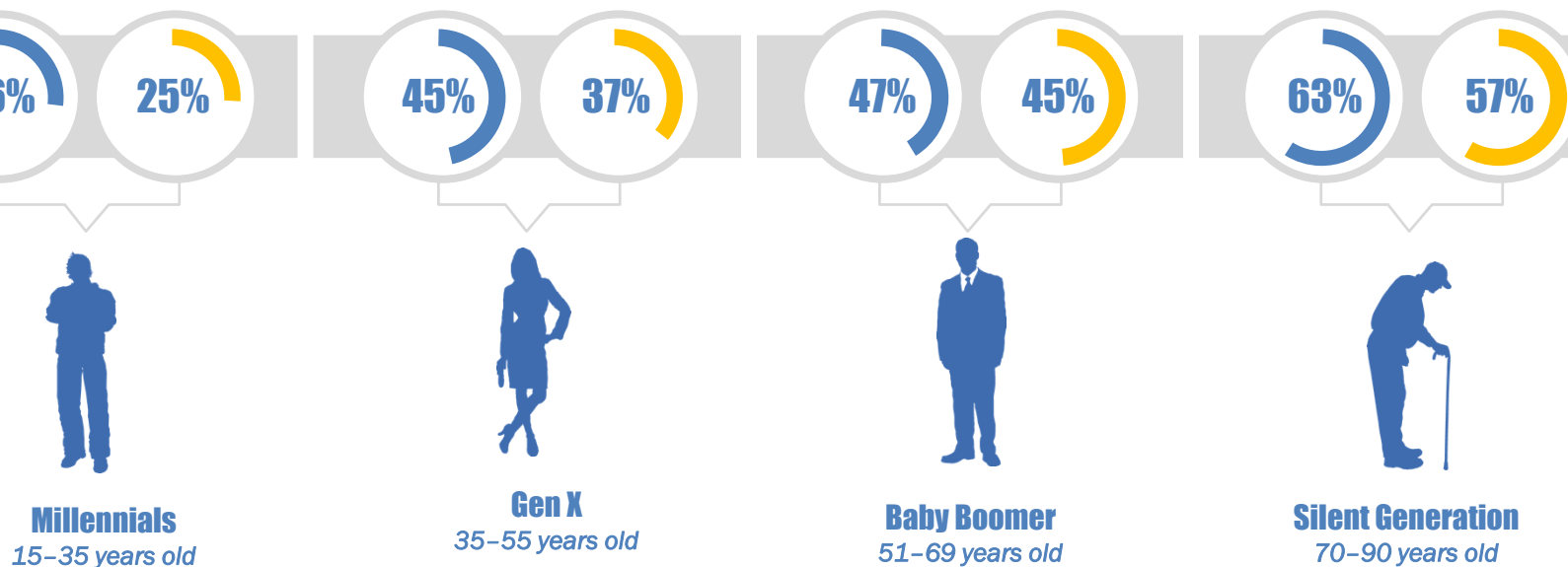
Not Important

Satellite Radio

Voice Commands

Safety Technology is More Important As Drivers Age

How Important Are The Following Technology Features to You?



● Back-Up Camera ● Blind Spot Detector

Q: How important are the following technology features to you?
Q: What is your age?
In-Vehicle Technology Survey
N = 2076

Younger Drivers Value Connectivity Features More

How Important Are The Following Technology Features to You?

● USB/Auxiliary Port ● Bluetooth

25%

30%



Silent Generation
70–90 years old

42%

39%



Baby Boomer
51–69 years old

62%

49%



Gen X
35–55 years old

59%

44%



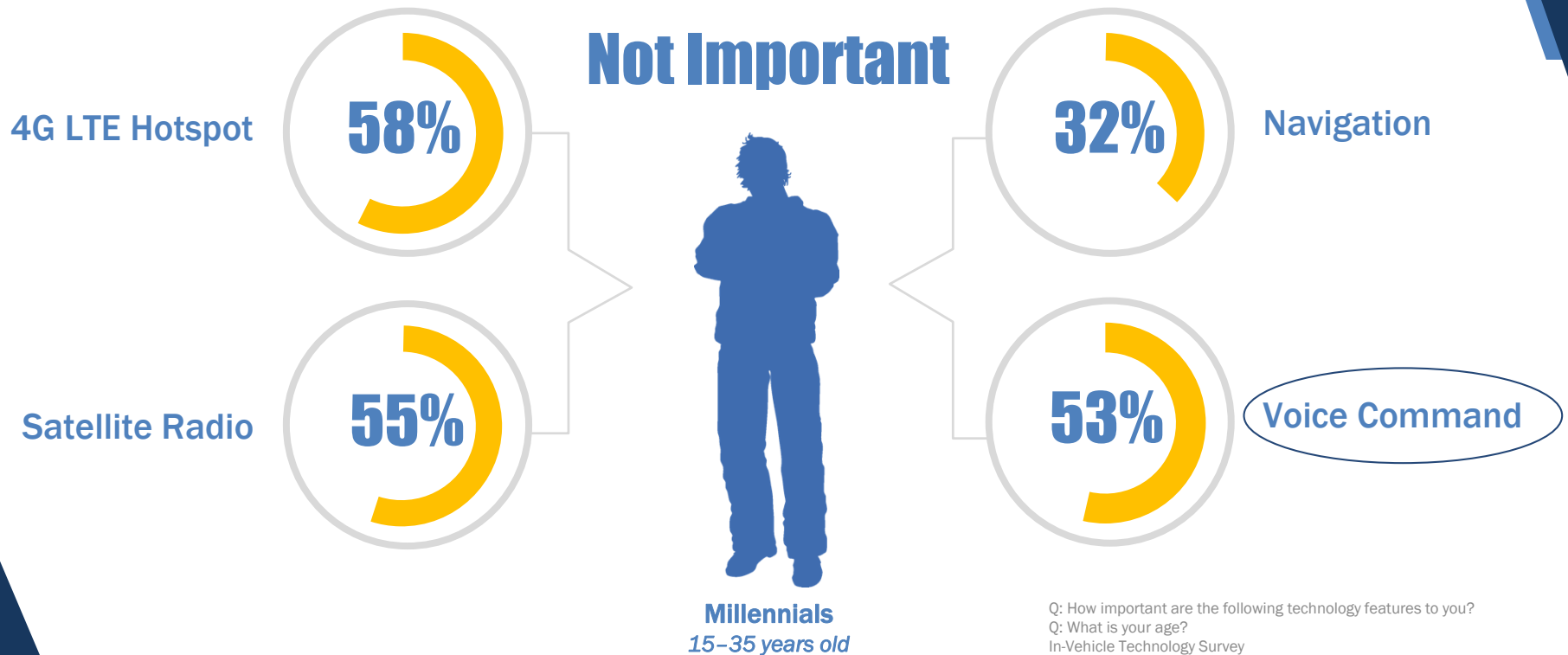
Millennials
15–35 years old

Q: How important are the following technology features to you?
Q: What is your age?
In-Vehicle Technology Survey
N = 2076



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Worryingly, Phone Features Are Not Important To Millennials When Shopping For a New Vehicle



Key Takeaways

- As advanced driver assist systems penetrate the market, KBB and Autotrader will continue to educate consumers on the technologies.
- As familiarity and experience grows, consumers will become more comfortable with ADAS such as blind spot monitor, lane departure warning, and adaptive cruise control.
- Efforts towards educating drivers about distracted driving need to continue and even intensify.
- ADAS can help mitigate dangers but consumers need to value the technology and be willing to pay for it and learn how to use it.



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Thank You
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