



Press Release

U.S. and Canada among most skeptical of Autonomous Vehicles

In the U.S., political divides hint at an impending car-culture war

New York International Auto Show, March 28, 2018 —There is widespread interest in autonomous vehicles, but the U.S. — one of the largest auto markets in the world — expresses higher levels of resistance than most nations.

Nearly one in four Americans “would never use” an autonomous vehicle. This is just one key finding from a report about the future of mobility released by Ipsos, a leading global market research firm. Ipsos surveyed more than 21,000 adults across 28 countries about acceptance of AVs, which autonomous features are most in demand, potential ownership models and regulation options. The study was conducted as part of its What the Future series, which couples survey data and interviews with experts in the field to see what “big questions” companies should be asking themselves about the future of their industries. This issue of What the Future focuses on mobility, and if people are ready for the coming technology. Despite American tech and automotive companies leading the way in AV development, Americans are among the most reluctant to use it. Those in China, in contrast, are twice as likely to say they “can’t wait” to use AVs than Americans or Canadians.

Other results from the report (available for download at <https://gen-pop.com/wtf>)

- More would prefer to continue owning their own vehicle (42%) than other proposed usage models including hiring one on a per-use basis (22%) or leasing one for a monthly **subscription** fee (14%)
- Democrats (59%) were more likely than Republicans (46%) to say they had a favorable view of self-driving cars
- Many Americans are unsure where **regulation** should come from, but would prefer manufacturers and tech companies (36%) to self-regulate over government regulation (24%)
- **Cost** will be a factor: 24% said they would switch to a self-driving car if it cost the same as their current car, but 45% would switch if it cost *much less*
- Many Americans (30%) would **take more road trips** in self-driving cars, including longer trips and new destinations
- Globally, a majority of those surveyed say that AVs will be easier, more comfortable safer, more relaxing, more economical, more enjoyable, and friendlier to the environment. Fewer think AVs will be faster
- Americans are more **skeptical** of touted benefits including improved safety, comfort and ease-of-use
- Autonomous **parking** is the feature respondents are most ready to use, with 58% saying they would utilize autonomous functionality “always or frequently.” Many (47%) would use it for commuting and in stop-and-go traffic, and 52% would use it for long-distance drives
- Younger Americans (under 35) have more favorable views of self-driving cars and their benefits

Perhaps the reluctance of Americans to embrace this emerging technology has to do with its strong identity as a car-culture. Nearly **six in 10 people consider themselves “car people,”** and 81% feel that the car they drive **reflects their personality,** a least to some degree. Digging deeper into the data, Ipsos found hints of a coming **car-culture clash** as noticeable divides about acceptance of autonomous vehicles are seen along political lines.

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Q1: For this question, please assume that, in 10 years, all passenger vehicles will be equipped with automation technology so they can be used in "self-driving" mode anytime and anywhere, as desired. If so, how often do you expect that you will use a vehicle in "self-driving" mode for each of the following:

Parking	58%
Highway driving	53%
Commuting	53%
Driving in unfamiliar places	52%
Long drives	52%
Driving in City	51%
Driving alone	51%
Driving in Scenic Places	50%
Short drives	48%
Driving in heavy stop-and-go traffic	47%
Driving with passengers	46%
Driving in bad weather	40%

Q2: Which of the following statements is closest to your own opinion?

	Total (28 countries)	U.S.	Canada
I am in favor of self-driving cars and I can't wait to use them	30%	22%	18%
I am unsure about self-driving cars, but I find the idea interesting	58%	54%	58%
I am against self-driving cars and would never use them	13%	24%	24%

Q3: How much do you agree that self-driving cars will make driving...

	Total (28 countries)	U.S.	Canada
Easier	69%	59%	57%
More comfortable	68%	52%	52%
More relaxing	64%	51%	51%
More enjoyable	59%	51%	47%
Friendlier to the environment	57%	41%	40%
More economical	52%	44%	42%
Safer	51%	38%	40%
Faster	46%	34%	33%

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Q4. Which of the following do you trust most to regulate self-driving cars? (Select all)			
	Total (28 countries)	U.S.	Canada
Companies that design and manufacture self-driving cars	43%	36%	26%
The government/public authorities overseeing transportation	28%	24%	34%
Insurance companies	16%	15%	12%
Automobile/motorists' associations/clubs	15%	15%	10%
Other/Not sure/None of the above	30%	40%	42%

Q5. Which of the following would you choose if you wanted to use a self-driving car?			
	Total (28 countries)	U.S.	Canada
Owning my own	42%	37%	31%
Hiring one on a pay-per-use basis to pick me up and take me where I need to go	22%	18%	16%
Leasing one for a monthly fee and having access to it whenever I want, as long as I pay for it	14%	12%	10%
I would not use a self-driving car	16%	26%	27%
Not sure/Other	16%	17%	24%

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Across a number of topics addressed in the What the Future report the data show that Democrats are more supportive of autonomous vehicles, more interested in their features and benefits and more assured that these vehicles are coming in the near future.

Do you consider yourself a car person or someone who is passionate about cars, trucks, motorcycles, or other vehicles you drive yourself?			
	Democrat	Republican	Independent/None
Yes (Net)	58%	67%	54%
No (Net)	42%	33%	46%

And what is your view of self-driving cars?			
	Democrat	Republican	Independent/None
Positive (Net)	59%	46%	50%
Negative (Net)	41%	54%	50%

“The safety improvements, potential cost-saving, and increased convenience might well prove a trifecta of benefits that can trump any sort of political discord,” said Clifford Young, President, US, Ipsos Public Affairs. “But social change on this scale does not happen without conflict, and those who do not plan for it will be the first to see their plans derailed by our age of uncertainty.”

About the Study

For the global study, 21,549 interviews were conducted between November 27th – December 8th, 2017 among adults aged 18-64 in the U.S. and Canada, and adults aged 16-64 in all other countries. The survey was conducted in 28 countries around the world via the Ipsos Online Panel system: Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States. Data is weighted to match the profile of the population.

Further U.S. and Canadian data are from a series of Ipsos polls including: an Ipsos survey conducted between February 16 and 20, 2018 among 1,005 U.S. adults; an Ipsos survey conducted between December 19 and 21, 2017 among 2,000 U.S. adults; and, Ipsos survey conducted between February 23 and 26, 2018 among 1,000 Canadian adults; and, an Ipsos survey conducted between February 20 and 22, 2018 among 1,002 Canadian adults.

Weighting was then employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll is accurate to within ± 3.5 percentage points for the $n=1000$ surveys and ± 2.9 percentage points for the $N=2000$ survey, 19 times out of 20, had all citizens been polled. The credibility interval will be wider among subsets of the population. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. See www.ipsos.com/en-us for full datasets and methodology.

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About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 88 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,782.7 million in 2016.

GAME CHANGERS

« Game Changers » is the Ipsos signature.

At Ipsos we are passionately curious about people, markets, brands and society.
We make our changing world easier and faster to navigate and inspire clients to make smarter decisions.
We deliver with security, speed, simplicity and substance. We are Game Changers.

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