

Consumer Survey on Automated Driving Systems in Japan, US and Europe: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute has conducted a consumer survey on automated driving systems in Japan, US and Europe with the following conditions:

1. Research period: September to October, 2017
2. Research objects: 2,000 men and women in Japan, US and Europe who have their drivers' license for more than a year, drive a car twice or more a week, and 20 years of age or older. (500 people in Japan, 500 in US, 400 in Germany, 300 in UK, and 300 in France)
3. Research methodologies: Online consumer survey

<What is a Consumer Survey on Automated Driving Systems in Japan, US and Europe?>

This research has conducted an analysis on the difference of the needs of automated driving systems by region after carrying out an online consumer survey in Japan, US and Europe (Germany, UK, and France), in the situation where global automakers have been accelerating their study and development of the system. Among various questions to the consumers in the survey, this report shows the results of the following items: Expectation and eagerness to buy an automated driving system, the occasions most expected to use automated driving systems (i.e., what occasions automated driving systems are likely to be used most), what they would like to do in the vehicle during automated driving hours, and how much they would pay for an automated driving system on the assumption that they would drive on highways. Note that some survey results are compared to the results of the questionnaire conducted in 2014 to analyze the changes in the needs in automobile users (drivers).

◆ **Key Findings**

■ **More than 40% of Automobile Users Expect Highly of Automated Driving Systems**

To the question regarding expectation and eagerness to buy an automated driving system (single response allowed), the total number of users who responded either "Expectation is fairly high and would like to buy the system" or "Expectation is high and would like to consider buying one" dominated more than 40% in Japan, US, and Europe (Germany, UK, and France). Among the regions, the expectation is especially high in Europe, where the users who responded that "Expectation is fairly high and would like to buy the system" accounted for 19.0%, and those who responded "Expectation is high and would like to consider buying one" accounted for 34.3%, the total of which was 53.3%.

■ **Japanese Users Would like to Most Use Automated Driving Systems for Travelling/Leisure/Homecoming, and American Users for Daily Lives (for Shopping)**

To the question "what occasions automated driving systems are likely to be used most (multiple responses allowed)", the largest number of response acquired by the users in Japan was travelling/leisure/homecoming occupying 40%, that in US was daily lives (for shopping) 43.2%, and in Europe was at the time when not feeling good/tired/short of sleep which accounted for 38.6%.

■ **As For Activities within Vehicle During Automated Driving Hours, About 50 % of Users in Japan Would Like to Take a Nap, Those in US and Europe Would Like to Talk**

To the question “what would you like to do during automated driving hours (multiple responses allowed)” the largest number of response gained by the users in Japan was to take a nap, dominating 47.0%, while 49.8% of the users in US and 57.9% of those in Europe would like to talk (briefing) with other passengers.

■ **For Automated Driving Systems on Assumption of Driving on Highways, Rate of Response by Users in US and Europe Who Would Pay for 100,000 Yen Or More Is On the Rise When Compared with 2014 Survey**

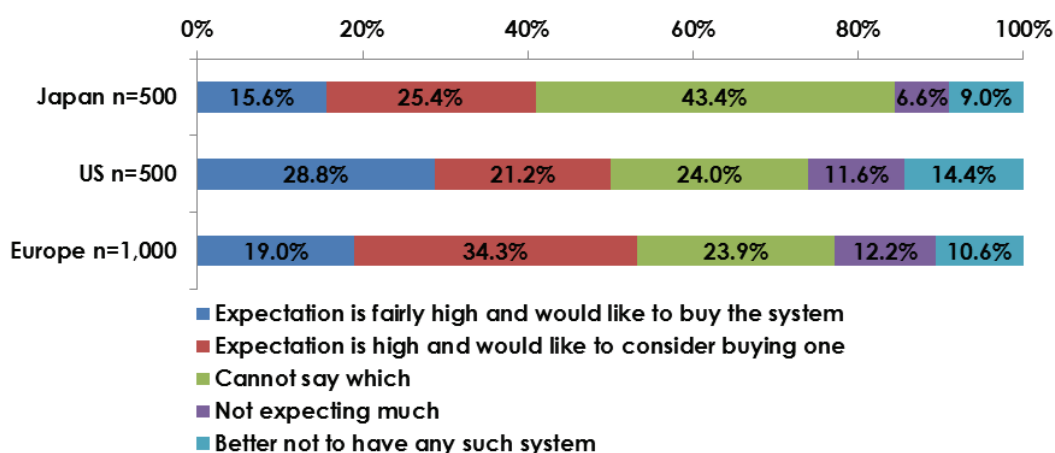
To the question “how much would you pay for an automated driving system on the premise that you would drive on highways (single response allowed)”, when compared with the responses in the survey conducted in 2014, whereas not much difference in the Japanese users, the rate of the response of paying it for 100,000 yen or more is on the rise among the users in US and Europe. It indicates that the automobile users who want to use an automated driving system regardless of some size of amount to be paid in US and Europe are increasing, now that the system has become more feasible on highways.

◆ **Report Format**

Published Report: “Automated Driving System Market 2017 – Comparison of Consumer Demand in Japan, US, and Europe”
 Issued on: December 6, 2017
 Language: Japanese
 Format: 203 pages in A4 format
 Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure 1. Expectation and Eagerness to Buy Automated Driving Systems**

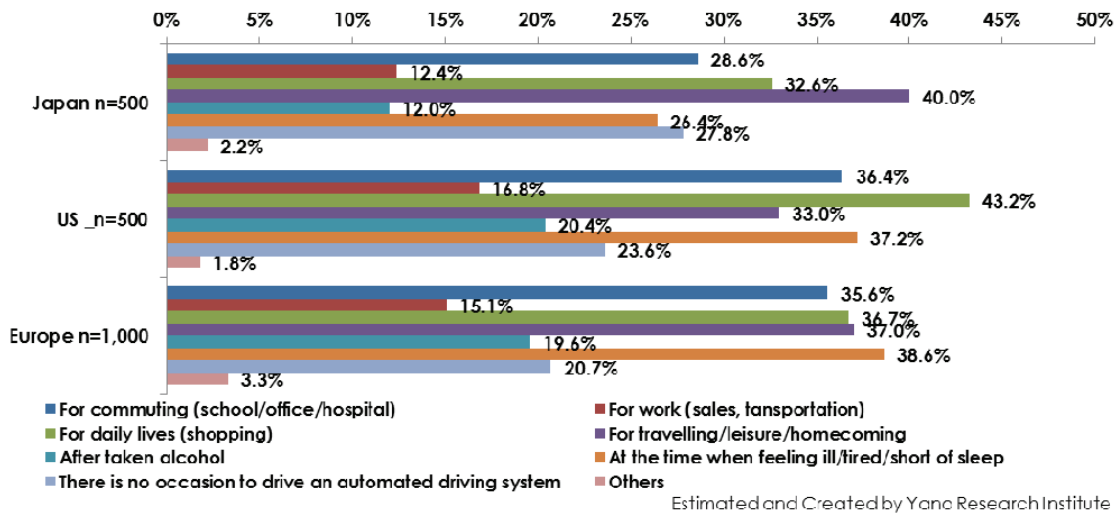


Estimated and Created by Yano Research Institute

Notes:

1. Research Period: September to October, 2017; Research Objects: 2,000 men and women in Japan, US and Europe (Germany, UK, and France) who have their drivers' license for more than a year, drive a car twice or more a week, and 20 years of age or older. (500 people in Japan, 500 in US, 400 in Germany, 300 in UK, and 300 in France); Research Methodology: Online questionnaire; Single response allowed.

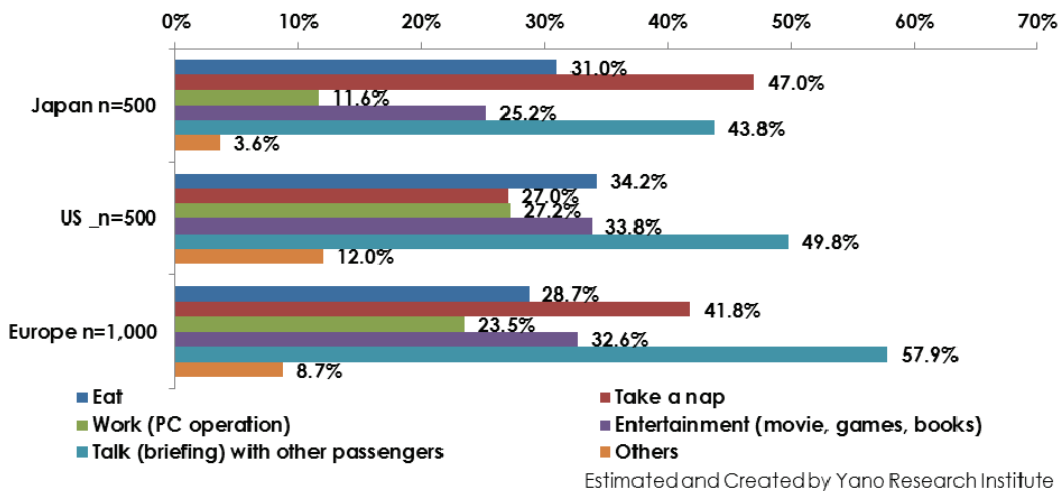
■ **Figure 2. Occasions Most Expected to Use Automated Driving Systems (What Occasions Automated Driving Systems are Likely to be Used Most)**



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- Research Period: September to October, 2017; Research Objects: 2,000 men and women in Japan, US and Europe (Germany, UK, and France) who have their drivers' license for more than a year, drive a car twice or more a week, and 20 years of age or older. (500 people in Japan, 500 in US, 400 in Germany, 300 in UK, and 300 in France); Research Methodology: Online questionnaire; Multiple responses allowed.

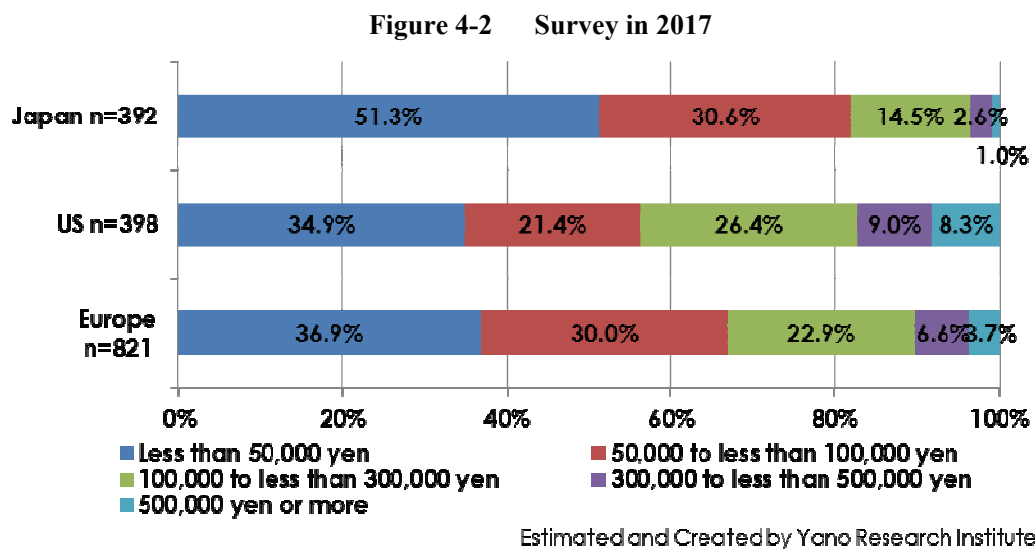
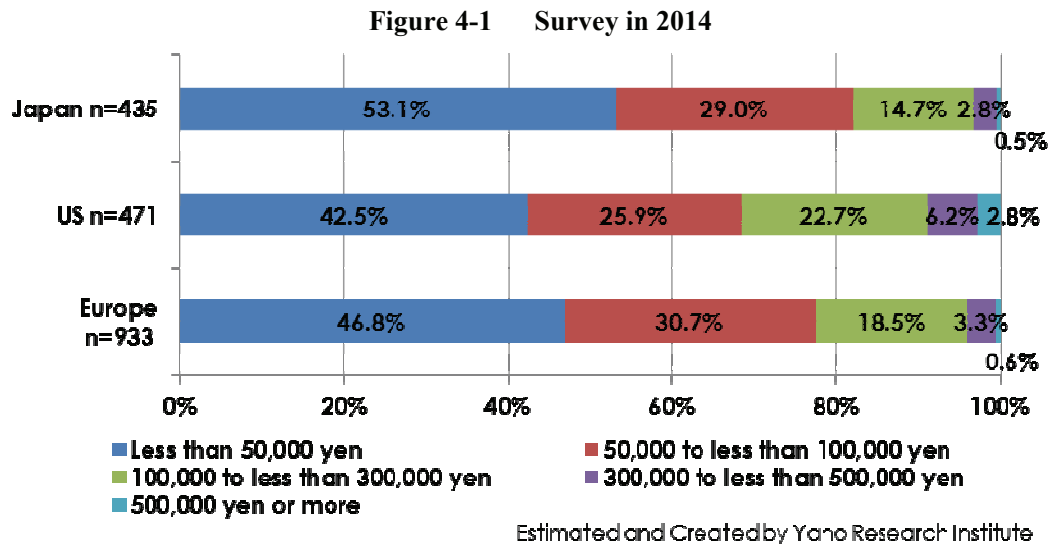
■ **Figure 3. What You Would Like To Do in the Vehicle During Automated Driving Hours**



Notes:

- Research Period: September to October, 2017; Research Objects: 2,000 men and women in Japan, US and Europe (Germany, UK, and France) who have their drivers' license for more than a year, drive a car twice or more a week, and 20 years of age or older. (500 people in Japan, 500 in US, 400 in Germany, 300 in UK, and 300 in France); Research Methodology: Online questionnaire; Multiple responses allowed.

■ Figure 4. How Much Would You Pay for Automated Driving System on Assumption of Driving on Highways (Comparison between Surveys Conducted in 2014 and 2017)



Notes:

- Research Period Conducted in 2014: July 2014; Research Objects: Out of 2,198 men and women in Japan, US and Europe (Germany, UK, and France) who have their drivers' license for more than a year, possess a car within the household, and 20 years of age or older (526 people in Japan, 560 in US, 452 in Germany, 337 in UK, and 323 in France), those 1,893 people who responded (435 people in Japan, 471 in US, 933 in Germany, UK, and France); Research Methodology: Online questionnaire; Single response allowed.

Notes:

- Research Period Conducted in 2017: September to October, 2017; Research Objects: Out of 2,000 men and women in Japan, US and Europe (Germany, UK, and France) who have their drivers' license for more than a year, drive a car twice or more a week, and 20 years of age or older (500 people in Japan, 500 in US, 400 in Germany, 300 in UK, and 300 in France), those 1,611 people who responded (392 people in Japan, 398 in US, 821 in Germany, UK, and France); Research Methodology: Online questionnaire; Single response allowed.