Self-Driving Vehicle Sentiment Survey
United States, 2021
CarGurus Self-Driving Vehicle Sentiment Survey

In this report, you’ll find a recap of the study’s findings followed by implications for the automotive industry and what this means for dealerships in particular.

About the study
In April 2021, CarGurus surveyed 1,247 automobile owners in the U.S. through an online survey on their sentiments towards self-driving vehicles and driver-assistance features. Respondents were balanced in terms of key demographics (gender, region, income) according to the U.S. census. CarGurus also surveyed owners in 2019 (n= 1,146) and 2018 (n=1,873) for earlier iterations of this benchmarking study. In addition, the study was conducted in Canada and the U.K. in 2021.
Comfort with AVs

Over time, people have gotten more comfortable with the idea of self-driving cars and fewer are concerned. Excitement for AVs, however, remained flat over the past three years. People feel most comfortable with the idea of still being behind the wheel, and least comfortable sharing the roads with self-driving delivery trucks or fleets or putting their loved ones in a self-driving car.

What is your overall opinion about the development of self-driving cars?

<table>
<thead>
<tr>
<th>Year</th>
<th>Excited</th>
<th>Neutral</th>
<th>Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>21%</td>
<td>32%</td>
<td>47%</td>
</tr>
<tr>
<td>2019</td>
<td>32%</td>
<td>31%</td>
<td>37%</td>
</tr>
<tr>
<td>2021</td>
<td>33%</td>
<td>37%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Which of the following scenarios do you feel comfortable with?

- Being the ‘pilot’ in a self-driving car: 53%
- Sharing the roads with self-driving cars: 32%
- Being a passenger in a self-driving car: 31%
- Putting a loved one in a self-driving car: 29%
- Sharing the roads with self-driving delivery trucks/fleets: 22%
- I am not comfortable with any of these scenarios: 20%
Timeline to AV adoption

A third of consumers say they expect to own a self-driving vehicle in the next ten years, or by 2031. Shoppers say it’s a huge leap in technology, but most are not yet convinced the pros outweigh the cons especially with regard to safety.

How likely are you to own a self-driving vehicle..? showing probably/definitely

<table>
<thead>
<tr>
<th></th>
<th>In the next five years</th>
<th>In the next ten years</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>4%</td>
<td>13%</td>
</tr>
<tr>
<td>2019</td>
<td>11%</td>
<td>28%</td>
</tr>
<tr>
<td>2021</td>
<td>18%</td>
<td>34%</td>
</tr>
</tbody>
</table>

What are you most excited about when it comes to self-driving cars? Select up to three.

- It’s a huge leap in technology: 45%
- They will make travel by car safer: 31%
- I’d appreciate a car that does the driving for me: 31%
- They will make my travel/commute time more productive: 29%
- They will make travel by car more fun: 25%

What are you most concerned about when it comes to self-driving cars? Select up to three.

- I’m not comfortable relying on them for safety: 51%
- They will be very expensive: 45%
- I worry about who is responsible if something goes wrong: 43%
- I don’t think the technology is ready yet: 31%
- I like driving and prefer to operate the car: 27%
- Sharing the roads with them: 22%
Driving assistance features (ADAS)

Driving assistance features, on the other hand, are widely regarded as advancements in safety. Compared to previous years, slightly more consumers own the range of driving assistance features and interest remains strong, but unchanged.

68% agree with the statement: “Driving assistance features make travel by car safer.”

By comparison, only 31% of respondents chose “self-driving cars will make travel by car safer” as a reason to be excited for the technology.

Which of the following driving assistance features do you own? Which would you be interested in for your next vehicle?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Already own</th>
<th>Very/extremely interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backup/reversing camera</td>
<td>42%</td>
<td>39%</td>
</tr>
<tr>
<td>Blind-spot monitoring</td>
<td>17%</td>
<td>56%</td>
</tr>
<tr>
<td>Pedestrian detection</td>
<td>7%</td>
<td>53%</td>
</tr>
<tr>
<td>Surround view camera</td>
<td>6%</td>
<td>53%</td>
</tr>
<tr>
<td>Adaptive cruise control</td>
<td>19%</td>
<td>37%</td>
</tr>
<tr>
<td>Lane-keeping assist</td>
<td>14%</td>
<td>40%</td>
</tr>
<tr>
<td>Automatic emergency braking</td>
<td>12%</td>
<td>42%</td>
</tr>
<tr>
<td>Rear cross-traffic alert</td>
<td>9%</td>
<td>42%</td>
</tr>
<tr>
<td>Driver attention monitor</td>
<td>8%</td>
<td>38%</td>
</tr>
<tr>
<td>Automatic parking</td>
<td>3%</td>
<td>42%</td>
</tr>
<tr>
<td>Traffic sign recognition</td>
<td>3%</td>
<td>37%</td>
</tr>
</tbody>
</table>

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How people imagine using AVs

When thinking about the possibilities self-driving cars can unlock, shoppers are most excited by the idea of the car driving them home safely when they’re unable, parking itself, and picking up online orders. There are also shared-transit users ready and willing to take driverless transportation.

Once the technology was safe enough to do so, which of the following ways would you want to use a self-driving car? Consider each and select all that apply.

**To drive me home safely** when I’m unable:
I’d rely on an AV to safely bring me home after I’ve had a few drinks or when I’m too tired to drive 56%

**To park itself/self-valet:**
I’d send my AV to look for an available spot and park itself 42%

**To pick up groceries or online orders:**
I’d order online and have my AV pick up the order curbside and return home with the delivery 36%

**To be productive:**
I’d work or get errands done while the car drove itself 34%

**To entertain myself:**
I’d watch a movie, scroll social media, or find other ways to entertain myself while the car did the driving 33%

**To carpool my family:**
I’d put my children or loved ones in a self-driving car to safely bring them where they need to go 16%

37% of ride-hailing users (e.g., Uber) would be likely to take a self-driving car provided by the service

34% of public transportation users would be likely to take a self-driving car provided by the service
Trust in AV brands

Tesla is the most trusted brand to develop AVs (just as they were EVs), but nearly 2 in ten respondents say they don’t trust any company to develop the tech. There’s no consensus among consumers, but over half expect AV brands to bear the brunt of responsibility for any accidents that occur.

What brand do you trust most to develop self-driving vehicles?

Select one.

- Tesla: 34%
- Toyota: 19%
- Apple: 8%
- Toyota: 7%
- BMW: 5%
- Ford: 5%
- Honda: 5%

What brand of self-driving vehicle would you be likely to consider, assuming they were available?

Select all that apply. ¹

- Tesla: 54%
- Toyota: 35%
- BMW: 32%
- Honda: 27%
- Audi: 25%
- Ford: 25%

For what reasons would you not trust a brand’s self-driving capabilities? Select all that apply.

- The technology is too early for me to trust any brand’s self-driving capabilities: 51%
- Overpromises/under-delivers on self-driving capabilities: 36%
- High-profile crashes in the news: 34%
- Not known as a tech-savvy company: 29%
- I don’t think their traditional cars are reliable: 27%
- I don’t know or recognize the company: 26%
- Not an established manufacturer of traditional cars: 21%

If there is an accident involving a self-driving car (and no other drivers are to blame), who should be responsible for the damages? Select all that apply.

- 44% the pilot in the driver’s seat and/or their insurance
- 56% the manufacturer e.g., Tesla, Ford

¹ among those who plan to own a self-driving vehicle in next decade

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Implications for the automotive industry:
1. **Consumers’ excitement for AVs has stalled.** Just as the advances in tech have. A third of consumers are excited for (33%) and expect to own an AV (34%) in the next ten years—fairly consistent with results from 2019. True full autonomous tech with commercial viability is still not ready, which is in line with consumer expectations.
2. **Shoppers today are more interested in Level 1-3 AV tech with ADAS features,** like adaptive cruise control (37%), automatic parking (42%), or emergency braking (42%). These technologies are widely regarded as safe and interest is strong, but flat versus prior years. OEMs can better highlight these offerings, in part by simplifying product names and educating consumers and dealers on their benefits.
3. **The future of AV tech must be designed to offer meaningful benefit to drivers.** Today, consumers say they’re most interested in using AVs to drive them home when they’re unable to safely (56%), which for many can be seen as interchangeable with ride-hailing services like Uber or Lyft. For personal ownership of AVs to happen, there needs to be more clear benefits and use cases for consumers.
4. **Tesla is most trusted and considered for AV,** however overpromises on self-driving capability and high-profile crashes are noted as top reasons to not trust an AV brand beyond it just being too soon to trust anyone.

Recommendations for dealerships:
1. **Equip your team to educate consumers on ADAS features.** Though the majority of consumers believe buying an AV is still at least 10 years away, interest in ADAS remains strong. More than two-thirds (68%) feel these systems make driving safer and they could be considered a steppingstone to self-driving cars. System names can vary by brand though, so it’s crucial you have a deep understanding of ADAS technology and provide consistent education to consumers during the shopping process. More information will translate to more satisfied customers and safer drivers on the road, so start getting consumers familiar with them.
2. **Don’t panic—AVs aren’t imminent.** With more than three-quarters (78%) of consumers uncomfortable with the idea of putting a loved one in an AV and more than half (51%) uncomfortable relying on them for safety, it’s clear that consumers are likely to shy away from AVs for a while.
3. **Pay attention to key trends on the topic.** AVs won’t be available to the public anytime soon—and could cost up to $200K when they are—but it’s important to stay relevant. Keep an eye on what different brands are doing and be open to adapting when the time comes.