Bitte decken Sie die schraffierte Fläche mit einem Bild ab.
Continental Mobility Study 2013: Project modules and methodological approaches

- Representative interviews in four countries
- Online interviews in seven countries for motives and background
- Focus groups

- Expert interviews in Germany and the U.S.A.

- Expert interviews in four countries

- Desk research
- Expert interviews

- Desk research
- Interconnecting analyses
International Perspective and Methodological Modules: 360-degree-approach involving all stakeholders

- France
  - Representative interviews with car users (1,000 per country)
  - Focus groups with car users
  - Online interviews about driving situations (200 per country)

- U.S.A.
  - Representative interviews with car users (1,000 per country)
  - Focus groups with car users
  - Online interviews about driving situations (200 per country)

- Brazil
  - Representative interviews with car users (1,000 per country)

- Germany
  - Representative interviews with car users (1,000 per country)
  - Focus groups with car users
  - Online interviews about driving situations (200 per country)

- Japan
  - Representative interviews with car users (1,000 per country)

- China
  - Representative interviews with car users (1,000 per country)

- India
  - Representative interviews with car users (1,000 per country)
### Continental Mobility Study 2013

#### Focal topics

<table>
<thead>
<tr>
<th>A. Attitudes towards Driving</th>
<th>B. Advanced Driver Assistance Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>C. Automated Driving</td>
<td></td>
</tr>
<tr>
<td>D. Expert’s View</td>
<td></td>
</tr>
<tr>
<td>E. Summary</td>
<td></td>
</tr>
</tbody>
</table>
Continental Mobility Study 2013
Attitudes towards Driving
Car Usage per Country: Different profiles

**Mileage per year**
- **Germany:**
  - High (30,000 km and more): 9%
  - Middle: 51%
  - Low (less than 10,000 km): 40%
- **China:**
  - High: 32%
  - Middle: 38%
  - Low: 30%
- **Japan:**
  - High: 25%
  - Middle: 64%
  - Low: 11%
- **U.S.A.:**
  - High: 39%
  - Middle: 50%
  - Low: 11%

**Year of manufacture**
- **Germany:**
  - 5 - 2 years: 62%
  - 2 years (and less): 26%
  - 5 years (and more): 15%
- **China:**
  - 5 - 2 years: 62%
  - 2 years: 46%
  - 5 years: 15%
- **Japan:**
  - 5 - 2 years: 32%
  - 2 years: 29%
  - 5 years: 18%
- **U.S.A.:**
  - 5 - 2 years: 25%
  - 2 years: 23%
  - 5 years: 15%

**Size of car**
- **Germany:**
  - Executive: 51%
  - Mid-size: 33%
  - Small: 27%
  - Other: 6%
- **China:**
  - Executive: 32%
  - Mid-size: 46%
  - Small: 54%
  - Other: 6%
- **Japan:**
  - Executive: 28%
  - Mid-size: 29%
  - Small: 41%
  - Other: 6%
- **U.S.A.:**
  - Executive: 61%
  - Mid-size: 48%
  - Small: 54%
  - Other: 6%

Figures in percent

---

Continental Mobility Study 2013

December 12, 2013
Klaus Sommer © Continental AG
Agreement with Statements About Car Driving: Boon and bane – Joy and stress

<table>
<thead>
<tr>
<th>Statement</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that I am a very good driver myself.</td>
<td>63</td>
<td>60</td>
<td>53</td>
<td>85</td>
</tr>
<tr>
<td>Driving a car is something I enjoy.</td>
<td>67</td>
<td>48</td>
<td>57</td>
<td>63</td>
</tr>
<tr>
<td>In the case of new technologies, I always initially wait to see if it proves itself.</td>
<td>55</td>
<td>47</td>
<td>55</td>
<td>63</td>
</tr>
<tr>
<td>Driving a car becomes more stressful when the roads are more congested.</td>
<td>67</td>
<td>40</td>
<td>50</td>
<td>49</td>
</tr>
</tbody>
</table>

Question: To what extent do you agree with the following statements about car driving?

Figures in percent
Top box displayed; scale 0 to 5
“The mounting volume of traffic poses enormous stress for me - stop-and-go on the freeway, for example.”
Stress Factors:
Traffic jams at the top

Question:
There are situations that occur while driving, some of which are more burdensome and others less strenuous. How do you find these situations: which of the following points cause you stress while driving and to what extent?

- Searching for a parking spot
- Traffic jams and stop/start traffic
- Driving in the center of a large city
- Driving through freeway construction sites
- Other traffic participants
- Frequently changing speed regulations
- Long freeway trips
- Driving at night
- Navigation through traffic
- Streets with particularly heavy traffic

Figures in percent
Agreement displayed
“In city driving, the emergency brake assist has happily relegated rear-end collisions to the past.”
## Experiences with Car Accidents:
### Rear-end collisions at the top

<table>
<thead>
<tr>
<th>Situation</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rear-end collision</td>
<td>44</td>
<td>45</td>
<td>37</td>
<td>46</td>
</tr>
<tr>
<td>Serious accident, independent of the question of fault</td>
<td>15</td>
<td>18</td>
<td>13</td>
<td>26</td>
</tr>
<tr>
<td>Accident with personal injury, independent of the question of fault or of the severity of the accident</td>
<td>12</td>
<td>10</td>
<td>18</td>
<td>23</td>
</tr>
<tr>
<td>Animal/vehicle crash with notable damages to your vehicle</td>
<td>18</td>
<td>22</td>
<td>11</td>
<td>20</td>
</tr>
</tbody>
</table>

**Question:** Which of the following situations has ever happened to you as a driver?

Figures in percent  
Top box displayed; scale 0 to 5;  
Share of yes displayed
Comfort-Oriented Advanced Driver Assistance Systems
Different usage rates throughout the nations

Question:
Today’s cars offer a lot of technical equipment that is aimed at supporting the driver. How often do you use these systems – regardless of whether they are in your car or another car? Do you use them regularly, every now and again, not at all, or are you not familiar with them at all?

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backup assist beeper for distance display at the rear</td>
<td>10</td>
<td>25</td>
<td>12</td>
<td>81</td>
</tr>
<tr>
<td>Backup assist beeper for distance display at the front</td>
<td>8</td>
<td>22</td>
<td>11</td>
<td>n/a</td>
</tr>
<tr>
<td>Cruise control</td>
<td>24</td>
<td>36</td>
<td>16</td>
<td>36</td>
</tr>
<tr>
<td>Reversing camera</td>
<td>5</td>
<td>28</td>
<td>17</td>
<td>81</td>
</tr>
<tr>
<td>Automatic cruise control</td>
<td>7</td>
<td>28</td>
<td>13</td>
<td>7</td>
</tr>
</tbody>
</table>

Figures in percent
Answers “regularly” and “every now and again” displayed
Comfort-Oriented Advanced Assistance Systems
Considered to be helpful

When you think of the system mentioned: How helpful do you perceive such possibilities all in all – entirely independent of whether you already use or know of these yourself. Would you say these are very helpful/somewhat helpful?

I agree

Figures in percent

Germany: 90
China: 90
Japan: 82
U.S.A.: 84
**Safety-Oriented Advanced Driver Assistance Systems**

Safety systems rather well known

<table>
<thead>
<tr>
<th>System</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency brake assist</td>
<td>61 9</td>
<td>38 13</td>
<td>85 8</td>
<td>54 7</td>
</tr>
<tr>
<td>Pedestrian detection</td>
<td>47 2</td>
<td>40 10</td>
<td>71 5</td>
<td>46 4</td>
</tr>
<tr>
<td>ESC</td>
<td>19 62</td>
<td>34 32</td>
<td>60 19</td>
<td>42 16</td>
</tr>
<tr>
<td>High headlamp assistant</td>
<td>37 16</td>
<td>36 19</td>
<td>56 7</td>
<td>38 11</td>
</tr>
</tbody>
</table>

Question:

In addition to this system, which you actively use yourself while driving, there are a series of additional technical options that support you in the background.

Figures in percent

Answer categories “I don’t know this system” / “no answer” not displayed

Germany  China  Japan  U.S.A.

- Known but not used
- Already used
“My car keeps an eye on the complete vehicle surroundings and helps me out in a pinch.”
### Assessment of Pedestrian Detection System: Positive statements

<table>
<thead>
<tr>
<th>Country</th>
<th>Convenient</th>
<th>Inconvenient</th>
<th>Useful</th>
<th>Not useful</th>
<th>Reliable</th>
<th>Unreliable</th>
<th>Technically mature</th>
<th>Not technically mature</th>
<th>I would love to have it</th>
<th>I do not need this system</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>U.S.A.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>India</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Question:** Spontaneously, how would you classify this system, which automatically brakes your car if a pedestrian or cyclist unexpectedly and suddenly steps in front of you on the road?

Figures in percent, Mean on scale 1-5
Assessment of Emergency Brake Assist:
Also positive judgment

Question:
Spontaneously, how would you classify this system, which automatically brakes your car to prevent an accident?

Figures in percent; Mean on scale 1-5

Germany
China
Japan
U.S.A.
Brazil
France
India
Segmentation: Helpfulness of Advanced Driver Assistance Systems
High, middle, low

<table>
<thead>
<tr>
<th>Country</th>
<th>High</th>
<th>Middle</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>33</td>
<td>65</td>
<td>2</td>
</tr>
<tr>
<td>China</td>
<td>22</td>
<td>65</td>
<td>13</td>
</tr>
<tr>
<td>Japan</td>
<td>17</td>
<td>75</td>
<td>8</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>25</td>
<td>68</td>
<td>7</td>
</tr>
</tbody>
</table>

- **High**: Rating active and background systems (comfort and safety ADAS) as very helpful
- **Middle**: Indifferent
- **Low**: Rating active and background systems (comfort and safety ADAS) as not helpful or even unnecessary

Figures in percent
Segmentation: Helpfulness of Advanced Driver Assistance Systems
Germany – Systems for everyone

<table>
<thead>
<tr>
<th>Average Age</th>
<th>Type of car</th>
<th>Type of driver</th>
<th>Mileage per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ø = 52</td>
<td>small</td>
<td>23</td>
<td>37</td>
</tr>
<tr>
<td></td>
<td>mid-range</td>
<td>60</td>
<td>49</td>
</tr>
<tr>
<td></td>
<td>executive</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>high</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>middle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>51</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>low</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>low</td>
<td>33</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>mid</td>
<td>54</td>
<td>51</td>
</tr>
<tr>
<td></td>
<td>high</td>
<td>13</td>
<td>7</td>
</tr>
</tbody>
</table>

Figures in percent
Missing percentages n/a

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Continental Mobility Study 2013

December 12, 2013
Awareness of Automated Driving:
Majority in Germany and China aware of development

Question: Had you ever heard about automated driving prior to this interview?

- Germany: 67%
- China: 64%
- U.S.A.: 50%
- Japan: 29%

Figures in percent
Answer category "no answer" not displayed
Attitudes towards Automated Driving: Useful but unnerving at the same time

<table>
<thead>
<tr>
<th>Opinion</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated driving is a useful advancement.</td>
<td>53</td>
<td>79</td>
<td>61</td>
<td>41</td>
</tr>
<tr>
<td>Automated driving will already belong to everyday life in 10 to 15 years.</td>
<td>50</td>
<td>65</td>
<td>37</td>
<td>40</td>
</tr>
<tr>
<td>Automated driving rather scares me.</td>
<td>52</td>
<td>52</td>
<td>42</td>
<td>66</td>
</tr>
<tr>
<td>I have waited a long time for automated driving.</td>
<td>19</td>
<td>44</td>
<td>39</td>
<td>23</td>
</tr>
<tr>
<td>I don't believe that it will function reliably.</td>
<td>48</td>
<td>74</td>
<td>43</td>
<td>50</td>
</tr>
</tbody>
</table>

Question: There are various different opinions about automated driving. We have therefore prepared five short statements. Are you more inclined to agree with these or more inclined to object to these?
“I love driving, but if the traffic proves too stressful, I'm happy to just ride along.”
Expectations Towards Availability of Partially Automated Cars: Majority expect partially automated cars within the next 15 years

Question:
What do you think: When will the first cars be available on the market that drive partially automatically so that you monitor traffic as a driver but do not have to do anything yourself as a general rule?

Figures in cumulative percent
Answers "more likely never"/"no answer" not displayed
### Appropriate Situations for the Use of Automated Driving: Freeway scenarios preferred

<table>
<thead>
<tr>
<th>Situation</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>On long freeway journeys</td>
<td>76</td>
<td>66</td>
<td>63</td>
<td>62</td>
</tr>
<tr>
<td>In traffic jams on the freeway</td>
<td>70</td>
<td>43</td>
<td>59</td>
<td>36</td>
</tr>
<tr>
<td>In city traffic</td>
<td>39</td>
<td>34</td>
<td>35</td>
<td>28</td>
</tr>
<tr>
<td>On rural roads</td>
<td>36</td>
<td>32</td>
<td>41</td>
<td>37</td>
</tr>
<tr>
<td>In especially light traffic</td>
<td>48</td>
<td>65</td>
<td>46</td>
<td>44</td>
</tr>
<tr>
<td>In especially heavy traffic</td>
<td>55</td>
<td>28</td>
<td>43</td>
<td>31</td>
</tr>
<tr>
<td>On your everyday journeys</td>
<td>27</td>
<td>45</td>
<td>41</td>
<td>37</td>
</tr>
</tbody>
</table>

**Question:** Automated driving can be used in various situations. For which of the following situations could you imagine it and for which situations more than likely not?

Figures in percent
Share of "yes" displayed

--

Continental Mobility Study 2013

December 12, 2013
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26
### Intention to Use Automated Driving in the Future:
Automation of stressful freeway situations welcome

<table>
<thead>
<tr>
<th>System</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated driving through freeway construction sites</td>
<td>41/28</td>
<td>40/15</td>
<td>45/20</td>
<td>42/23</td>
</tr>
<tr>
<td>Automated driving in a traffic jam on the freeway</td>
<td>35/19</td>
<td>38/18</td>
<td>41/22</td>
<td>32/17</td>
</tr>
<tr>
<td>Automated parking in a covered parking garage</td>
<td>27/19</td>
<td>36/19</td>
<td>40/20</td>
<td>27/18</td>
</tr>
<tr>
<td>Automated freeway driving</td>
<td>17/9</td>
<td>36/15</td>
<td>39/21</td>
<td>28/18</td>
</tr>
</tbody>
</table>

**Question:**
There will be additional technical assistance systems in the future. To what extent would you like to use the following systems in the future?

- □ absolutely
- ■ perhaps

Figures in percent
Answer categories “I don't know this system” / “no answer” not displayed
“I would like to have the car do the driving for me in tight roadwork situations on the freeway.”
Automated Driving on Freeways: Car drivers in Germany hesitant

Question:
Spontaneously, how would you classify this system which regulates the speed, controls the distances and, if necessary, also changes lanes?

Figures in percent, Mean on scale 1-5

- Germany
- Brazil
- China
- France
- Japan
- India
- U.S.A.
Assessment of Automated Driving in Construction Sites: Convenient and useful

Question:
Spontaneously, how would you classify this system which is driving for you, maintaining the gaps at the sides of your car and the distance from the vehicle in front in construction sites on freeways?

Figures in percent, Mean on scale 1-5

- Germany
- Brazil
- China
- France
- Japan
- India
- U.S.A.

Continental Mobility Study 2013

December 12, 2013
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“If the car itself becomes my chauffeur, I would like to use the time for other pursuits.”
Situation in a Highly Automated Car:
Preferred alternative activities

Question:
As mentioned in our examples, you as a driver can perform other activities during the highly automated driving phase …

Assuming that this system is ready to go …, what would you prefer to do while the automated driving system is activated?

- 45% listen to music or radio
- 34% make phone calls
- 41% talk to the other passengers
- 20% read something
- 21% check or write e-mails
- 18% surf online using an in-car screen
- 23% do nothing at all

Share for younger than 31 years

Figures in percent
Share of "yes" displayed
Multiple answers possible except for "do nothing at all"
Segmentation: Acceptance of Automated Driving
Fans, wait-and-sees, and skeptics

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fans</td>
<td>17</td>
<td>19</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Wait-and-sees</td>
<td>54</td>
<td>72</td>
<td>48</td>
<td>43</td>
</tr>
<tr>
<td>Skeptics</td>
<td>29</td>
<td>10</td>
<td>30</td>
<td>37</td>
</tr>
</tbody>
</table>

Figures in percent

- **Fans**
  - sum-index
  - usage in appropriate situations high

- **Wait-and-sees**
  - sum-index
  - usage in appropriate situations middle

- **Skeptics**
  - sum-index
  - usage in appropriate situations high
Segment Profiles: Acceptance of Automated Driving
Germany – Systems for everyone

<table>
<thead>
<tr>
<th>Age</th>
<th>Type of car</th>
<th>Type of driver</th>
<th>Mileage per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ø = 52</td>
<td>small</td>
<td>reluctant</td>
<td>low</td>
</tr>
<tr>
<td>Fans</td>
<td>55</td>
<td>23</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>mid-range</td>
<td>56</td>
<td>45</td>
</tr>
<tr>
<td></td>
<td>executive</td>
<td>19</td>
<td>12</td>
</tr>
<tr>
<td>Wait-and-sees</td>
<td>53</td>
<td>27</td>
<td>38</td>
</tr>
<tr>
<td></td>
<td>small</td>
<td>62</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td>mid-range</td>
<td>9</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td>executive</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Skeptics</td>
<td>50</td>
<td>27</td>
<td>44</td>
</tr>
<tr>
<td></td>
<td>small</td>
<td>63</td>
<td>48</td>
</tr>
<tr>
<td></td>
<td>mid-range</td>
<td>7</td>
<td>48</td>
</tr>
<tr>
<td></td>
<td>executive</td>
<td>9</td>
<td>6</td>
</tr>
</tbody>
</table>

Figures in percent
Missing percentages n/a
Segment Profiles: Acceptance of Automated Driving
Germany – ADAS has laid the foundations for acceptance of automated driving

<table>
<thead>
<tr>
<th>Age</th>
<th>Rating of Advanced Driver Assistance Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ø = 52</td>
<td></td>
</tr>
<tr>
<td>Fans</td>
<td></td>
</tr>
<tr>
<td>55</td>
<td>Very helpful: 75</td>
</tr>
<tr>
<td></td>
<td>Somewhat helpful: 22</td>
</tr>
<tr>
<td></td>
<td>Not very helpful: 2</td>
</tr>
<tr>
<td></td>
<td>Not at all helpful: 0</td>
</tr>
<tr>
<td></td>
<td>Unnecessary: 1</td>
</tr>
</tbody>
</table>

| Wait-and-sees |
|---------------|---------------------------------------------|
| 53            | Very helpful: 51                            |
|               | Somewhat helpful: 44                        |
|               | Not very helpful: 2                         |
|               | Not at all helpful: 1                       |
|               | Unnecessary: 1                              |

| Skeptics      |
|---------------|---------------------------------------------|
| 50            | Very helpful: 29                            |
|               | Somewhat helpful: 52                        |
|               | Not very helpful: 7                         |
|               | Not at all helpful: 0                       |
|               | Unnecessary: 9                              |

Figures in percent
Missing percentages n/a

- Fans
  - sum-index
    - usage in appropriate situations high

- Wait-and-sees
  - sum-index
    - usage in appropriate situations middle

- Skeptics
  - sum-index
    - usage in appropriate situations high

**Average Age**

- Fans: 55
- Wait-and-sees: 53
- Skeptics: 50

**Average Age**

- Fans: 55
- Wait-and-sees: 53
- Skeptics: 50
Reasonable Price for Automated Driving: Germans Expect Extra Costs

<table>
<thead>
<tr>
<th>Question</th>
<th>Germany</th>
<th>China</th>
<th>Japan</th>
<th>U.S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated freeway driving</td>
<td>€ 2,900</td>
<td>€ 2,600</td>
<td>€ 2,300</td>
<td>€ 1,100</td>
</tr>
<tr>
<td>Automated driving in a traffic jam on the freeway</td>
<td>€ 1,900</td>
<td>€ 2,300</td>
<td>€ 2,400</td>
<td>€ 800</td>
</tr>
<tr>
<td>Automated parking in a covered parking garage</td>
<td>€ 1,700</td>
<td>€ 1,900</td>
<td>€ 1,800</td>
<td>€ 900</td>
</tr>
</tbody>
</table>

Question: Independent of your wish to use such a system at all, this is also a question of cost. We would therefore like to know what price you would expect for the following three systems – on the assumption of a single new car purchase. Initially automated driving again in a traffic jam. The car drives by itself and you merely observe traffic.
Expert Insights into Prerequisites and Technology: Confidence in technology

Automated driving vehicles will be possible in everyday life – without any accidents and traffic jams.

A uniform, international legal basis for the registration of automated driving vehicles is essential.

Possibilities for simulating the present nonverbal communication in complex traffic situations between “driver-driver” and “vehicle-vehicle” resp. need to be developed.

More innovative and reliable solutions for software security are still needed.

Automated driving increases the vehicle’s energy efficiency.
Drivers need freedom to make decisions even with automated driving vehicles in order to still be able to control the vehicle when required, if the systems are to prevail on the market.

Vehicle equipment, communication, and advertisement still need to become less technology related and ought to focus more on the customer’s specific benefits.

End customers demand systems that increase active as well as passive safety.

End customers will recognize advantages and learn to appreciate automated driving by using individual assistance systems.

The introduction of further assistance systems and automated driving is successful within a shorter space of time when starting “bottom-up” from small vehicles and mid-range vehicles instead of targeting luxury vehicles first.
**Expert Insights into Awareness and Car Drivers:**

New providers & business models will enter the market

Linking technical systems will allow for additional new opportunities for combining information and communication technologies with vehicles. Therefore, new providers as well as new business models will enter the popular market.

The relationship between user and vehicle is going to change due to automated driving. Driverless vehicles will rather be used according to demand instead of purchased.
Continental Mobility Study 2013
Summary
Car drivers in Germany, China, the U.S.A., and Japan are open to automated driving in principle.

A majority can see the benefit of a suitable technology on the freeway (e.g. traffic jams) in particular.

A glance at the distribution of the acceptance levels across driver characteristics reveals that there is no factor particularly affecting the acceptance of Advanced Driver Assistance Systems (ADAS). There is no such thing as the typical user of these systems.

The same applies to automated driving. Furthermore: Acceptance of automated driving benefits from positive experience with Advanced Driver Assistance Systems. The better car drivers’ evaluate ADAS, the more open they are to automated driving.

At the same time, a large number of motorists feel unnerved by the development and don't believe that automated vehicles will function reliably.

The majority of car drivers expect partially automated vehicles to be available after 2020.

Germans expect more extra costs for automated driving features than drivers in other countries. Compared to the average price of a car in the surveyed countries, the price indications are more or less on a realistic level.

Experts trust in reliability of automated driving and see freedom to make decisions as a prerequisite for market success.