



Ki1

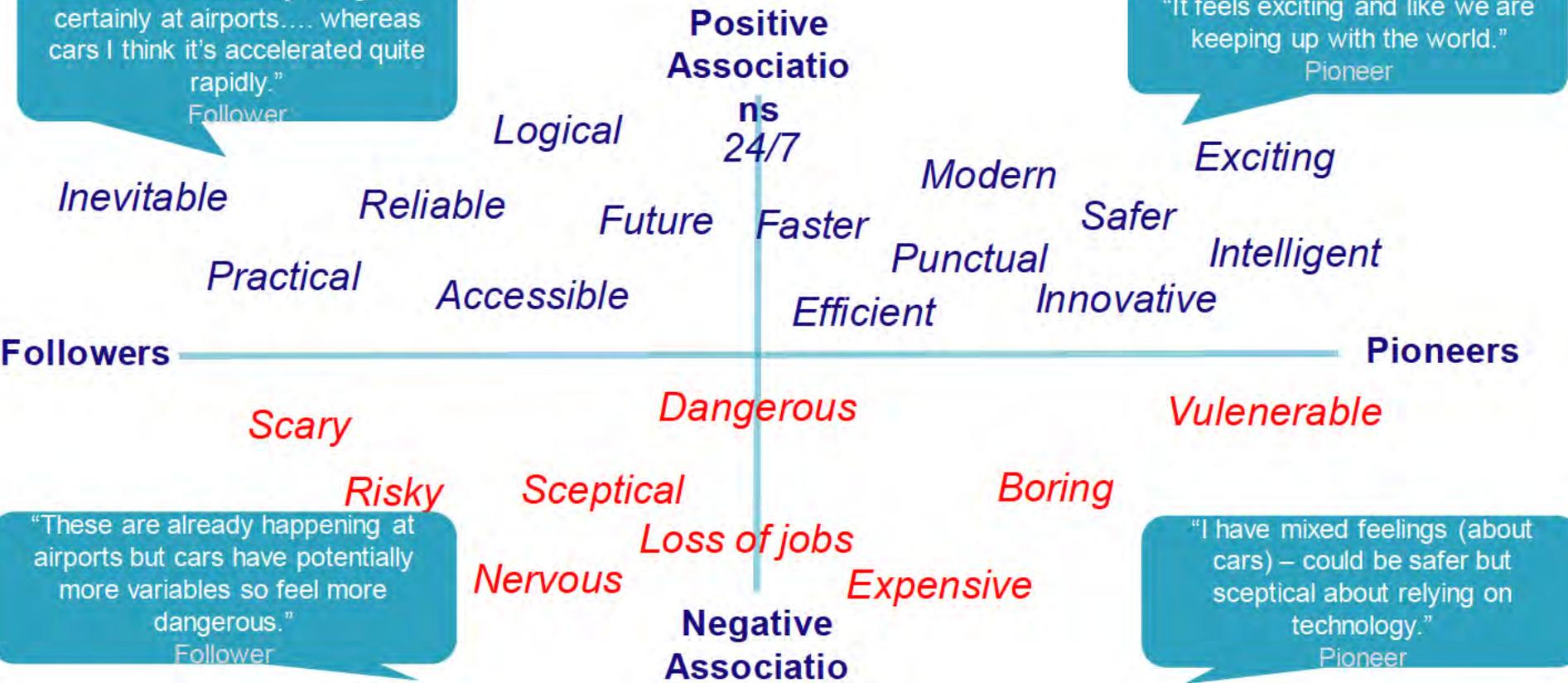
Automated vehicles are becoming more mainstream; definitely seen as part of the short term future for road and rail

Across Follower and Pioneer types, there is an understanding and acceptance that automated vehicles are the future

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"Trains are already doing it, certainly at airports.... whereas cars I think it's accelerated quite rapidly."
Follower

"It feels exciting and like we are keeping up with the world."
Pioneer



Customers using 'driverless' terminology and relate it to DLR and automated cars



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"Innovative...*Driverless*, is that a word?"
Pioneer

"*Driverless* cars is just a cheaper version to a taxi?"
Follower

"That's not a bad point actually, because if it's *driverless* then yeah why can't they run 24 hours."
Pioneer

"Its quite normal. The DLR is automated. The DLR has always been *driverless*?"
Follower

"I think just like this gentleman said, if it was all *driverless* cars on one road then I don't think I'd have a problem with it. But it's a mixture of both and the unpredictability of humans that would worry me."
Pioneer

"I know that Google and other companies are trialling completely *driverless* cars, but other car companies out there are all in it. I've already mentioned the parking."
Follower



Ki2

Distinct differences in responses to automated cars and automated trains with less confidence in automated cars than automated trains

'Pioneers' marginally more informed about automated cars than 'Followers'

Group Type	London (Viewed)		London (Non-Viewed)	
	Pioneers	Followers	Pioneers	Followers
2.A.1 – To what extent would you consider yourself well informed.....	5.1	4.4	3.5	3.3

Sources of Information

- National press
- Top Gear
- Personal experience e.g. new BMW driverless parking, Mitsubishi Advent sensor cruise control
- Publicity of Google driverless car

"I've seen the car where it parks it for you and all that; it's brilliant if it parks it for you."

Pioneer

"Just because is it the Telstra car that's around at the moment and someone got killed last week."

Pioneer

"They're testing them already in Sweden, America. I think they're planning on testing them on British roads by 2020 I've read somewhere."

Pioneer

Less confidence and trust in automated cars vs. trains

Safety is the critical variable that drives the low scores

	London (Viewed)		London (Non-Viewed)	
Group Type	Pioneers	Followers	Pioneers	Followers
2.A.2 – To what extent would you feel confidence in the safety, reliability, security.....	5.0 (7.4)	4.0 (5.9)	4.6 (4.6)	3.8 (7.8)

* Confidence in train

Reliability

- Not a concern
- Traffic may be more efficient if all cars were automated

Security

- Mild concern
- Potential for someone to hack into driverless software
- Likelihood low

Safety

- Major concern
- Multiple variables

“The 3 combined, it’s slightly awkward. I don’t think there is any reason to think that reliability and security, in fact they’re going to be really good with an automated car because a computer is obviously going to be great for reliability and security and it’s bringing up the safety mark which I would have thought would be a bit lower.”
Follower

“Immediately when I think about the first thought was panic because I was thinking when you’re driving, at least you are in control somehow. For example you know what’s going to happen ahead of you in the road.”

Follower

“I thought safety came to mind first and safety for trains I thought was feasible and had already been done and safety for cars I wasn’t so keen on.”

Follower

“I just think it’s risky. I can understand with trains because it’s on a track but there’s so much like....I can understand it on a motorway.”

Pioneer

“Yeah I’d say a lot more positive on the trains than cars...because the automated trains, the DLR, touch wood, there’s never been any problems with.”

Pioneer

“I think train would be an easier transition from driver to driverless than car.”

Follower

“No I don’t like it at all. I think we’re getting big, fat and lazy, this country is. Everyone’s walking about on the phones like this.”

Pioneer

Multiple variables associated with cars elevates degree of risk and dislike

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Practical, emotional and financial concerns emerge relating to

Practical

- Ease of use
- Potential for software error
- Mix of auto/non-auto vehicles
- Pedestrians
- Complexity of roads/traffic
- Temporary roadworks/lane closures
- Negotiating bikes/motorbikes

Emotional

- Risk of collision
- Fear of other driver behaviour
- Can't replicate human instinct
- Technology taking over
- Laziness
- Relinquishing control behind the wheel
- Boring

Financial

- Cost of vehicles
- Cost of updating software
- Insurance claims

“There’s lots more variables to take into consideration whereas a train runs on a track.”

Follower

“It is already happening but for cars. I just think there’s too many variables for cars.”

Follower

“The boredom of sitting in a 30mph robot.”

Pioneer

“I don’t actually like the idea, I think it could be very dangerous.”

Pioneer

“It’s a silly idea – safety being the factor.”

Pioneer

Some positives identified which could make automated cars appealing in the future for motorway driving

Allows me to do other things

Gives me gift of time

- Sleep
- Read
- Work

Meeting with colleagues

“I put productive on my thing because you can do other things while you're not driving. Not just saying on the phone, but I'm just saying you might be able to do a bit of work”
Pioneer

Increase safety

Eliminates human error

- Bad drivers
- Reduces number of cars
- No speeding
- Operate within law

“If you had 1,000 of them and if they're all one road and they're all obeying the speed limit, that would be a really good thing because what's crazy not only is the amount of traffic, it's the way everyone drives”
Follower

Increases accessibility

Enables people to drive

- Elderly
- Disabled
- Blind

“I put people who might otherwise not be able to drive like elderly or disabled, can get out and about”
Pioneer