

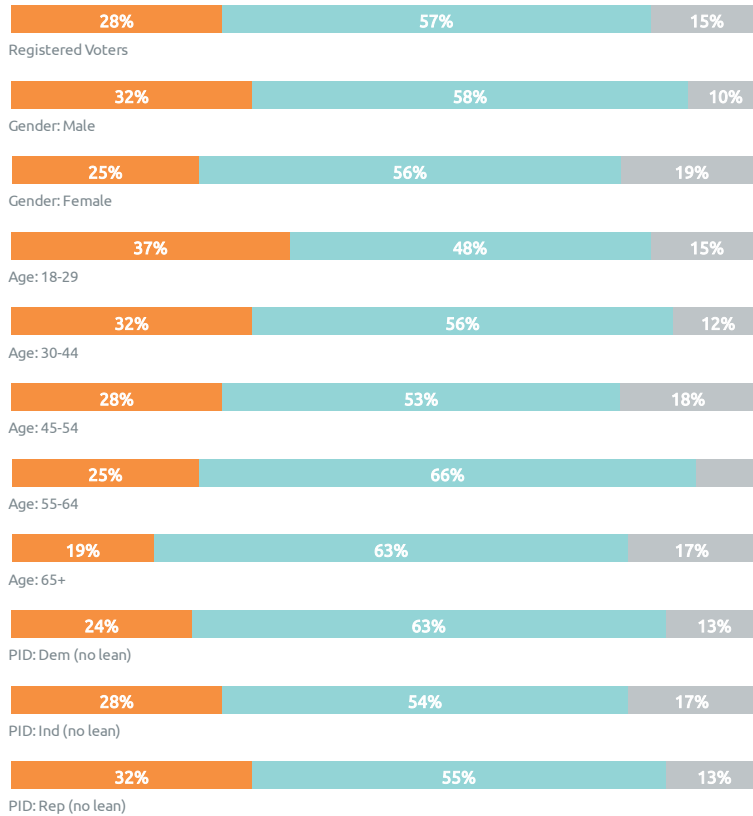
AUTONOMOUS VEHICLES

REGULATION OF AUTONOMOUS VEHICLES

3 in 5 voters favor one federal standard for rules governing the use of AVs on American roads

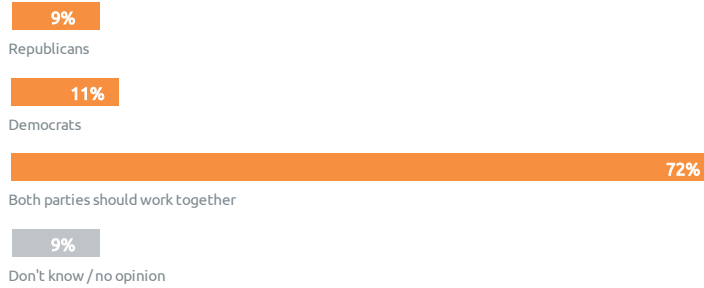
Which of the following comes closest to your view, even if neither is exactly right?

- States should create their own laws governing the safety and use of autonomous vehicles
- There should be one federal standard governing the safety and use of autonomous vehicles
- Don't know / no opinion



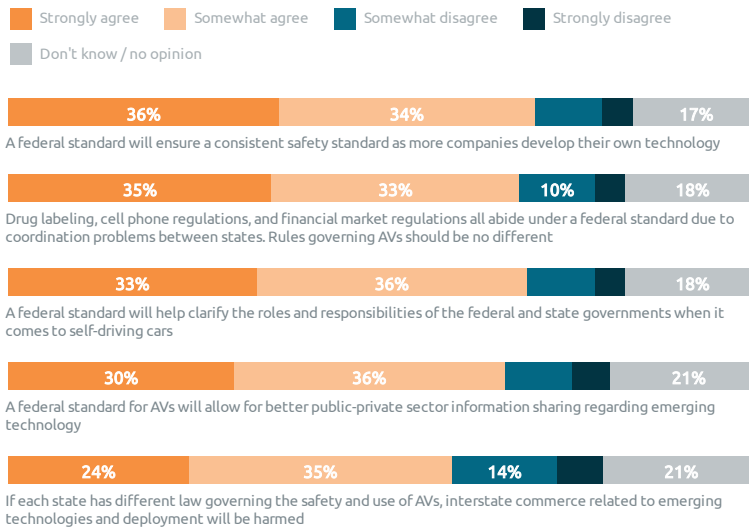
And, they overwhelmingly recognize policy related AV technology as a bipartisan issue

Who should take the lead when it comes to laws governing the safety and use of autonomous vehicles?



Messages in promotion of one federal standard are seen as most impactful...compared to those which advocate for state autonomy

Do you agree or disagree with the following statements:



...Compared to those which advocate for state autonomy

Do you agree or disagree with the following statements:

Strongly agree Somewhat agree Somewhat disagree Strongly disagree
Don't know / no opinion



If companies are focused on adhering to different regulations state by state, the U.S. will fall behind in the invention, testing and deployment of AVs



Manufacturers wouldn't create multiple variations of AVs in order to meet different state standards... they would just adapt to the biggest market and shut out entire state economies



States understand the unique characteristics of their weather and their infrastructure capabilities, and are best equipped to create laws governing AVs



States know the unique transportation needs for their residents and are best-equipped to create laws governing AVs

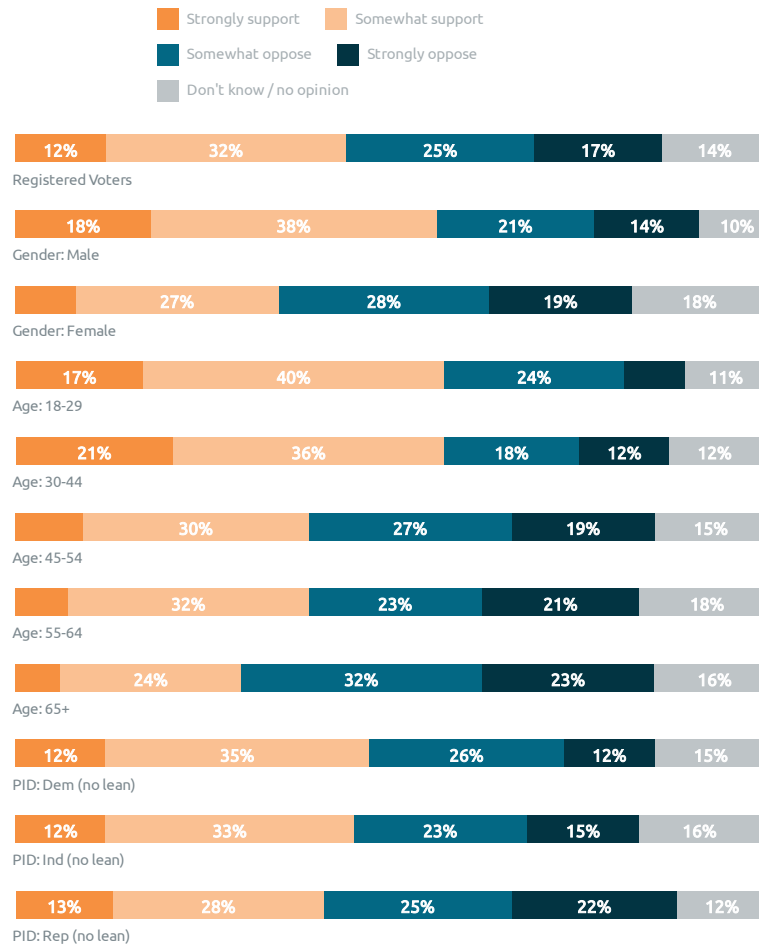


States should have the right to create their own laws regarding the AVs operating on their own roads

FAVORABILITY OF AUTONOMOUS VEHICLES

Plurality of voters (44%) initially support the use of AVs on American roads

As you may know, autonomous vehicles, also known as self-driving cars, are predicted to be available to consumers in the next few years. Generally speaking, do you support or oppose the use of autonomous vehicles on American roads?



Messages on the potential of AVs to increase road safety most convince voters to support their use

If you knew each of the following, would that make you more likely to support or more likely to oppose the use of autonomous vehicles on American roads, or would it not change your mind either way?

- Much more likely to support autonomous vehicles
- Somewhat more likely to support autonomous vehicles
- Somewhat more likely to oppose autonomous vehicles
- Much more likely to oppose autonomous vehicles
- Would not change my mind either way
- Don't know / no opinion



A recent report says autonomous vehicles could reduce traffic fatalities by up to ninety percent



Over eighty percent of car accidents are a result of human error



There are 38,000 traffic fatalities per year in the U.S., many of which are due to human error



There are no opportunities for a computer to be "distracted," which is a leading cause of accidents in the United States at present



Many cars are already equipped with features in the first stage of "automatic driving," such as autonomous braking and self-parking



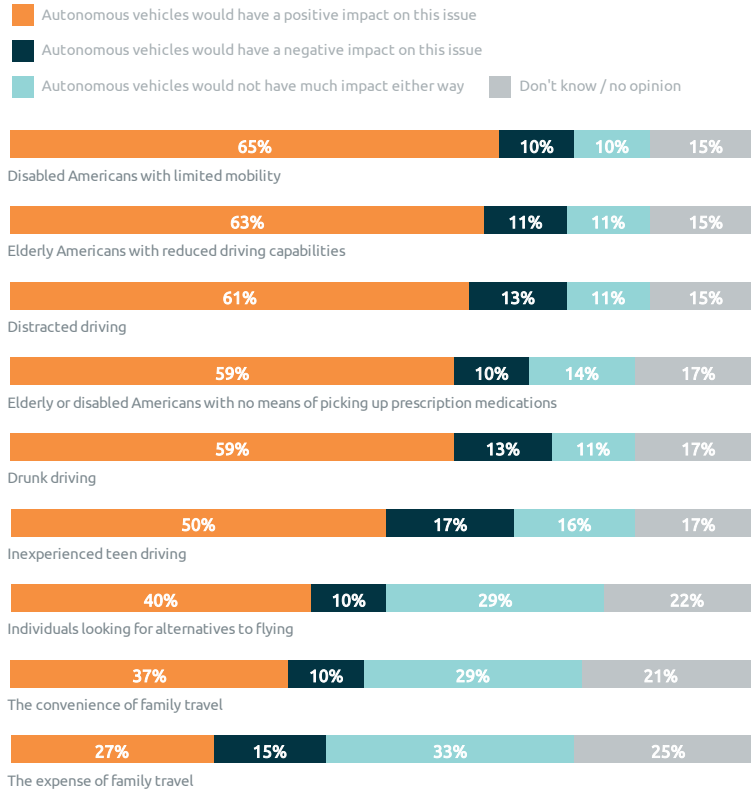
Autonomous vehicles may not be able to operate at a high level of safety in all weather conditions



If road technology fails, such as traffic signals that autonomous vehicles rely on, there's no accounting for human traffic signals

And, they also recognize their ability to increase mobility for elderly and disabled Americans

Do you believe autonomous vehicles would have a positive impact, a negative impact, or not much impact either way on each of the following issues?



Once voters are more aware of the impact of AVs, support for their use increases by 15-point margin

Now having thought about this more, do you support or oppose the use of autonomous vehicles on American roads?

