Cox Automotive

From Awareness to Consideration:
The Autonomous Vehicle Adoption Curve

September 2026

Objectives and Methodology

Online

May 2026

Fielded

2,135

Nationally representative of U.S. consumers ages 12–64

+300

Augment in AV cities (Waymo / Zoox)

What We Set Out To Answer

- Trend consumer sentiment vs. prior research (2016 & 2021)
- Understand preferences & adoption intent across autonomy levels
- Identify the key catalysts and barriers to AV adoption
- Assess robotaxi awareness, perceptions and usage

AV Cities

Atlanta • Austin • Dallas • Houston • Las Vegas • Los Angeles • Miami • Orlando • Phoenix • San Antonio • San Francisco

Note: Arrows indicate statistically significant differences at the 95% confidence level vs. prior timeframe. Statistically significant differences at the 95% confidence level included as callouts between groups to support overall findings.

Autonomous Vehicle Levels

Transition From Human Drivers To Vehicles Driving

0 HUMAN ONLY	1 MODERN VEHICLE	2 MODERN PLUS	3 PARTIAL AUTONOMY	4 FULL AUTONOMY (+ HUMAN)	5 FULL AUTONOMY (NO HUMAN)
No Cruise control, Anti-lock brakes, or Lane-keeping assist	Cruise control, Anti-lock brakes, Lane-keeping assist	Corrects lane drifting and avoids forward/rear collisions	Vehicle can take over driving in the city or on highways, but requires a human driver for unmarked roadways or highly congested areas	Vehicle can operate all aspects of driving. Humans can still drive if they want to	Vehicles don't contain steering wheel or pedals, and can't be driven by humans

Human control → **Vehicle control**

01 AV Awareness Rising in Last Decade

AV awareness surges: Familiarity and belief in a driverless future are up

Familiar with AV

(% Know a lot/some)

58%↑

(2016: 40%)

Awareness for Level 3-5 surged in last decade

AV Percentage in Lifetime

Consumers believe vehicles will be fully autonomous in their lifetime

46%↑

(2021: 37%)

Younger generations are more likely to believe vehicles will be fully autonomous in their lifetime

Source: 2026 Cox Automotive AV Research

Openness to AVs is growing — but so are safety concerns

How Perceptions Of AVs Have Shifted Over The Past 5 Years

37%

More Open / Trusting

- Technology has improved
- Firsthand experience shifted views
- Accessibility & convenience benefits
- Becoming normalized on the road

47%

Mixed

- Progress acknowledged, trust not yet earned
- Optimism tempered by real incidents
- Early skeptics gradually warming up

16%

More Cautious / Skeptical

- Accidents in the news
- Fear of losing control / AI distrust
- Not ready for real-world use yet

Source: 2026 Cox Automotive AV Research

Proximity breeds confidence:
AV-city residents shrug off negative headlines

Impact Of AV News On Perceptions, Among Those Who Have Seen/Heard It

What News Recall Centers On

68% Accidents & safety

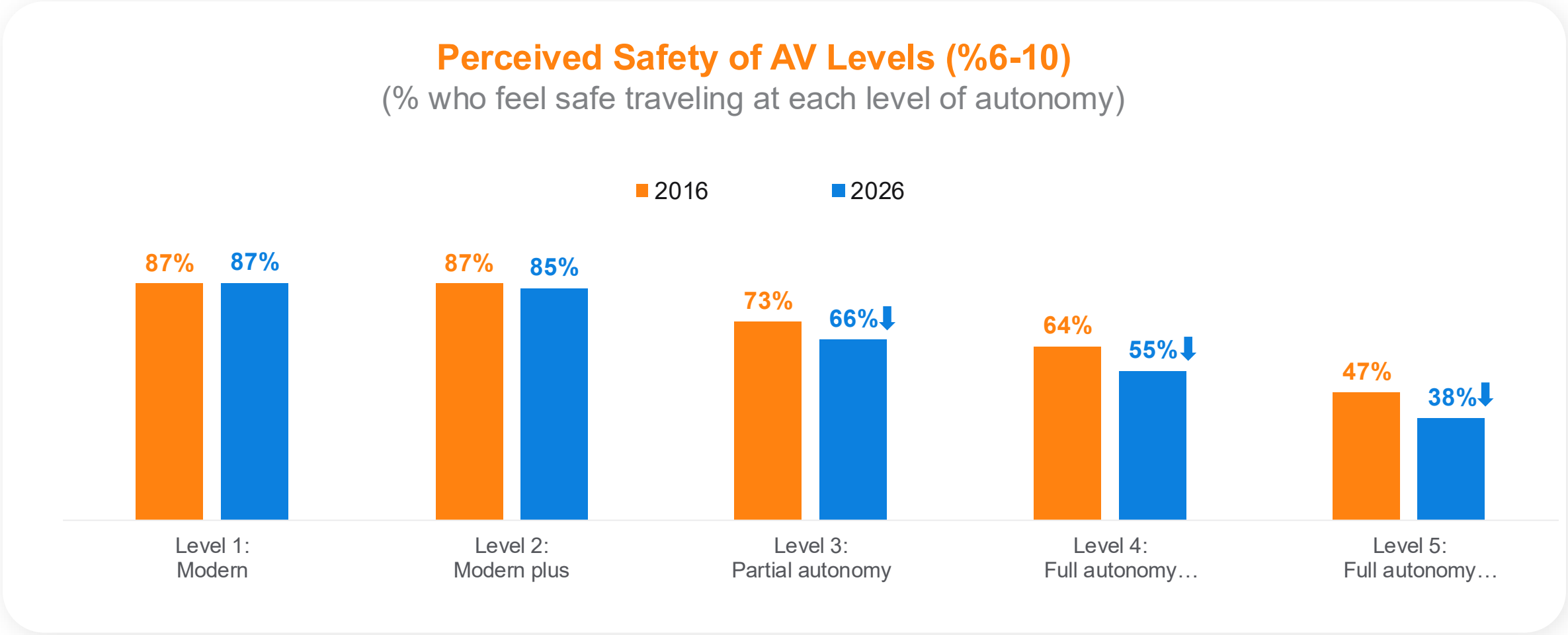
47% Technology & development

67% Adoption / expansion

46% Ethical / legal / privacy

Source: 2026 Cox Automotive AV Research

The more control AVs take, the further safety confidence falls

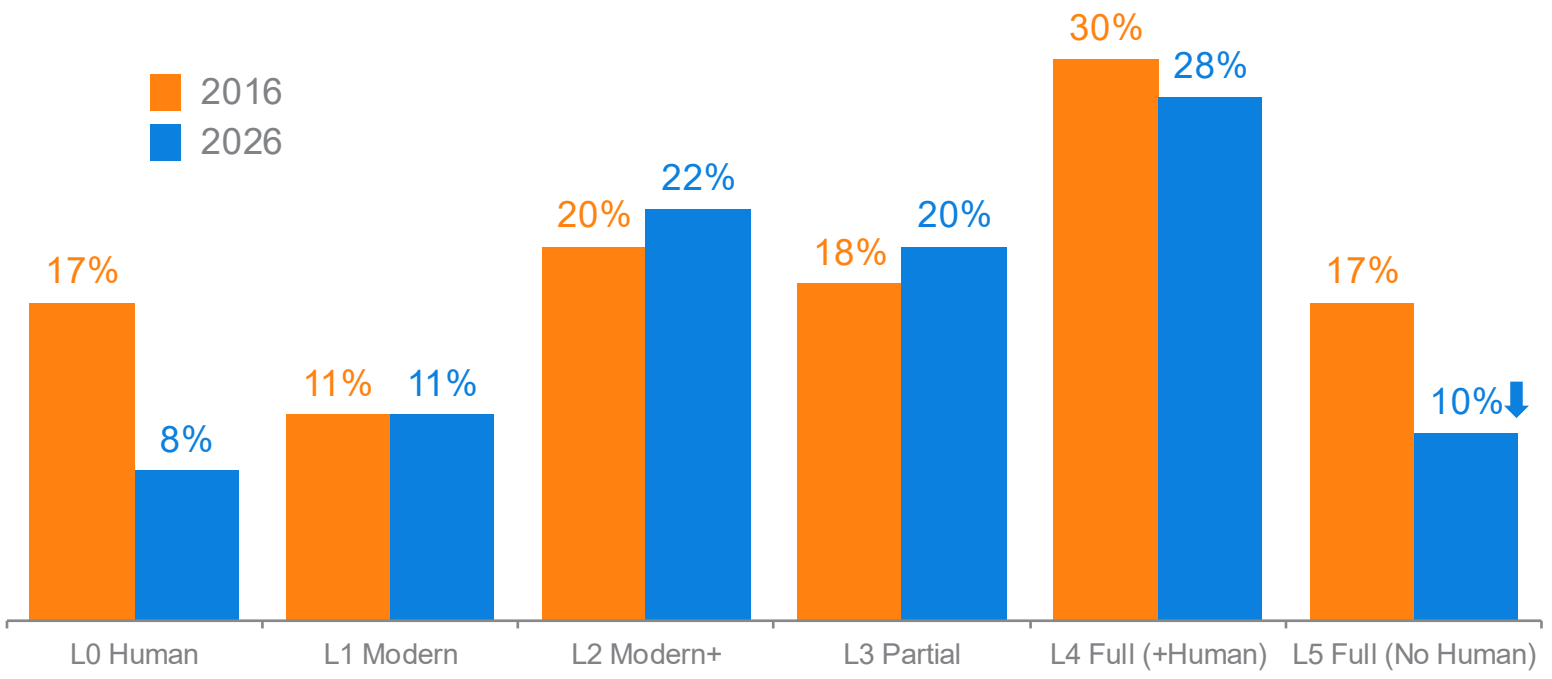


Source: 2026 Cox Automotive AV Research

02 Consumers are Looking for the Right Balance of Control and Safety

Level 4 garnered the most appeal. Consumers expressed the greatest interest in autonomy levels that preserve the option for human control.

Most Appealing AV Level — % Selecting Each As Most Appealing



Consumers most drawn to Level 4

38% Luxury owners

36% AV-city residents

36% $100K+ HHI

30% Gen Z / Millennials

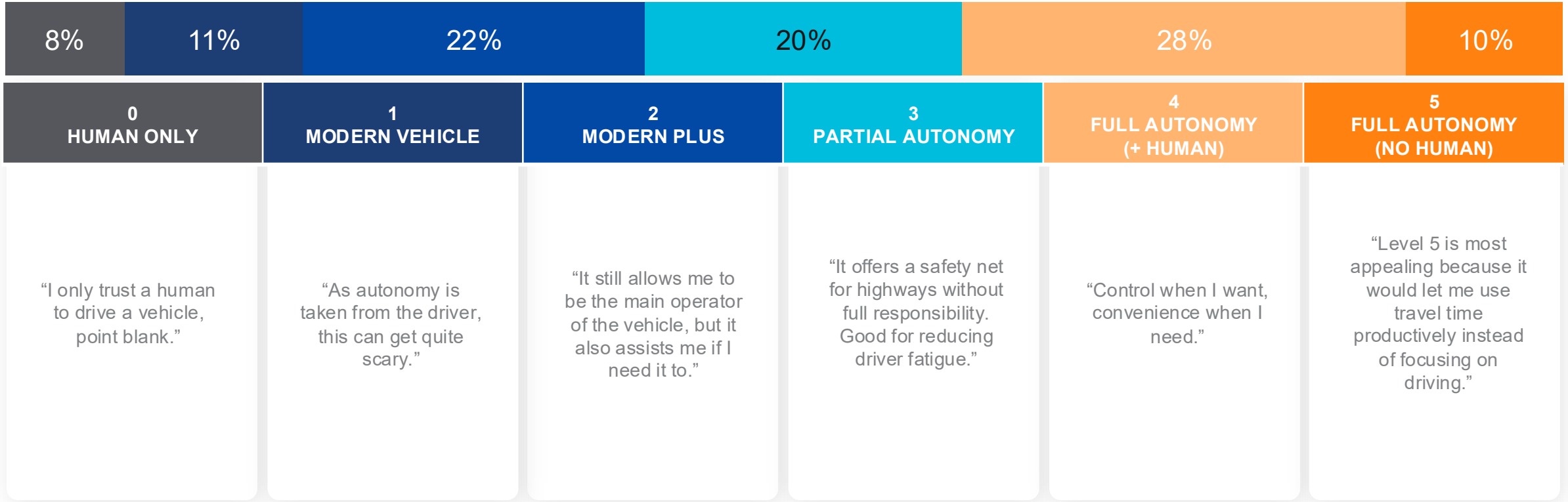
42% Level 3 owners

OEM TAKEAWAY Demand peaks where autonomy enhances the drive without removing control. Position Level 4 as the aspiration, Level 3 as the on-ramp.

Source: 2026 Cox Automotive AV Research

Control, safety, and choice drive AV appeal

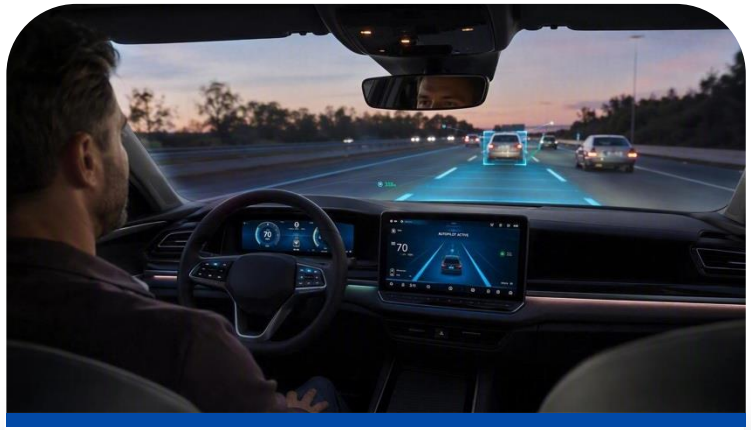
Reasons for Most Appealing AV Level



Source: 2026 Cox Automotive AV Research

Performance pulls buyers in; safety and trust risk hold them back

What Moves Consumers Toward Autonomy, What Stops Them, And The Features They Value Most



CATALYSTS

What pulls buyers in

1. Proven performance, safety and technology
2. Financial incentives
3. Ease of adoption
4. Recommendations and peer influence

BARRIERS

What holds buyers back

1. Safety and technology risk
2. Trust and control
3. Knowledge and awareness gaps
4. Cost concerns

MOST-LIKED FEATURES

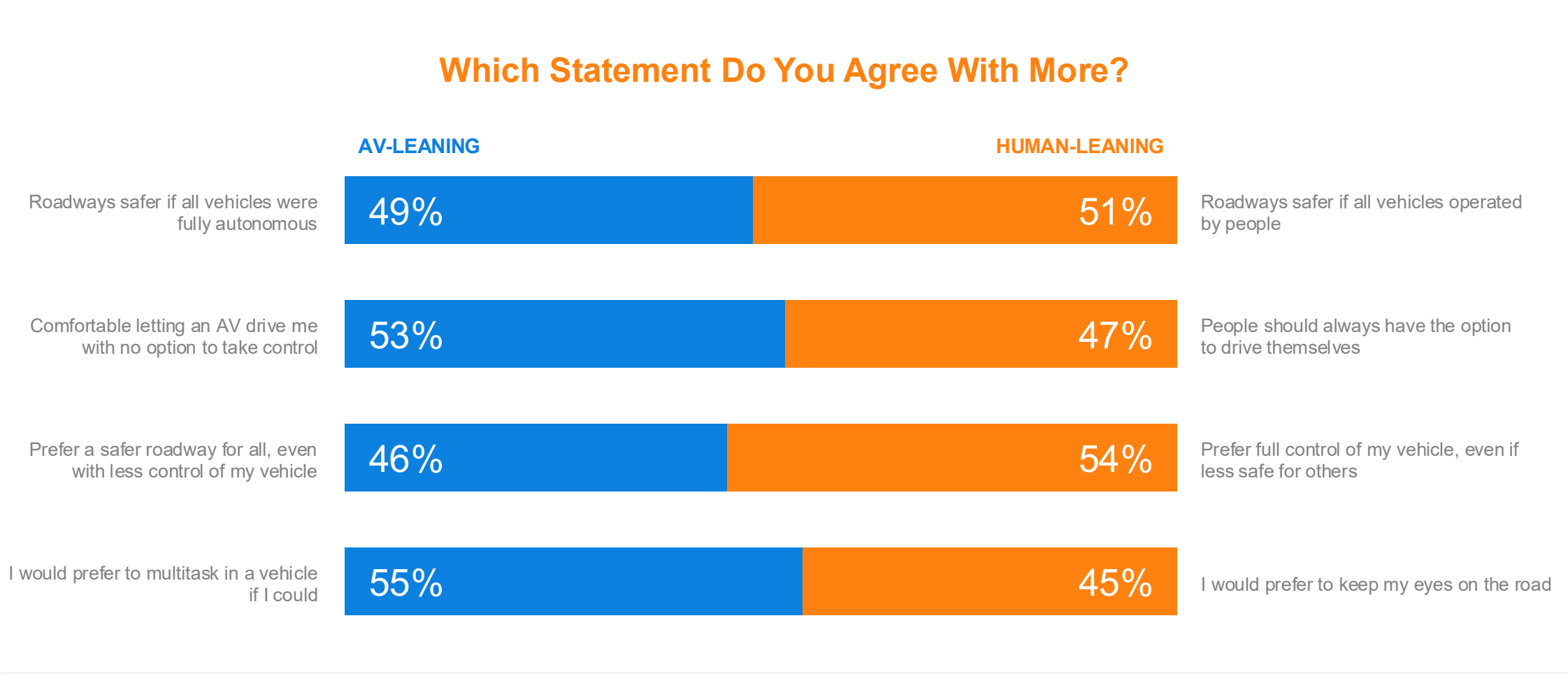
What they value in an AV

1. Safety and accident prevention
2. Practical benefits — drive yourself when you want*, faster commutes, lower insurance
3. Benefits for impaired and at-risk drivers

*Only applies to Level 3 and Level 4 vehicles.

Source: 2026 Cox Automotive AV Research

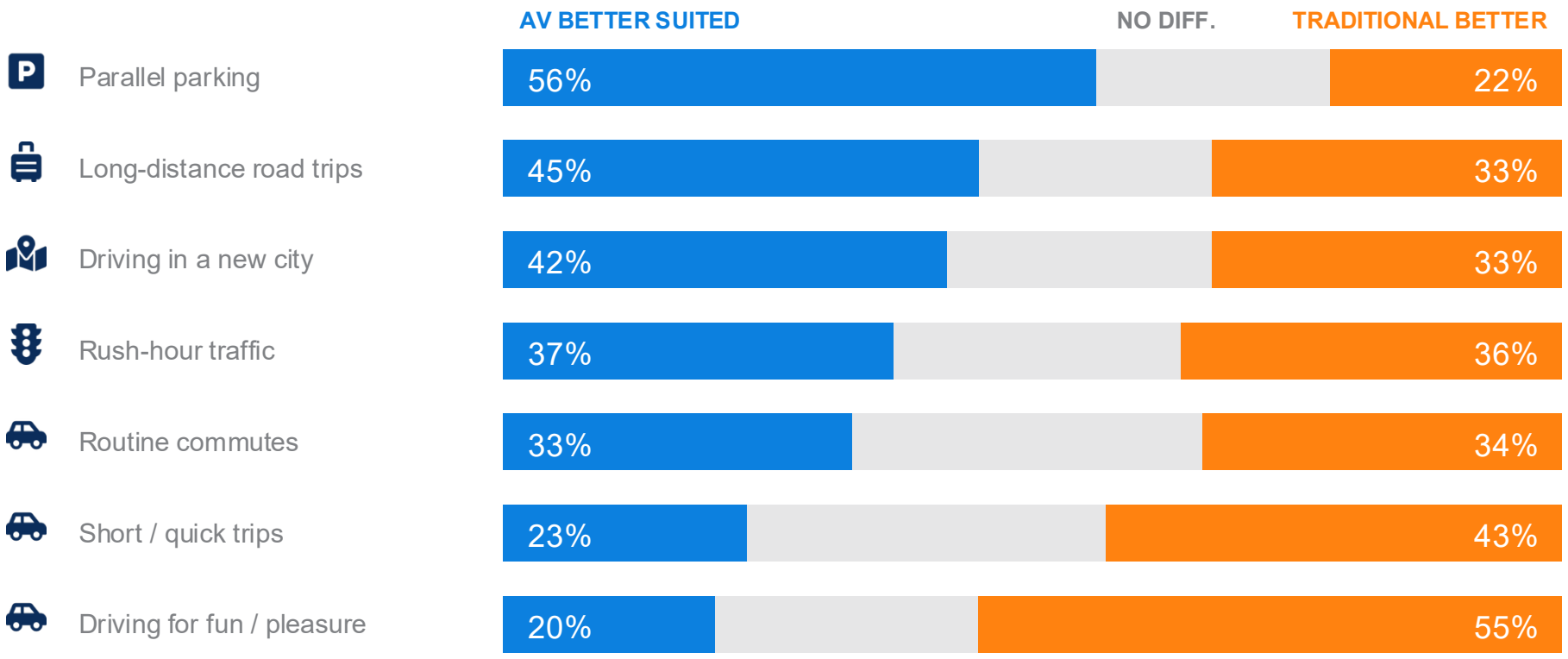
Consumers narrowly lean human — but multitasking tips AV



Source: 2026 Cox Automotive AV Research

AVs are perceived as better suited for parking, road trips, new cities & traffic

Best-Suited Vehicle Type By Situation

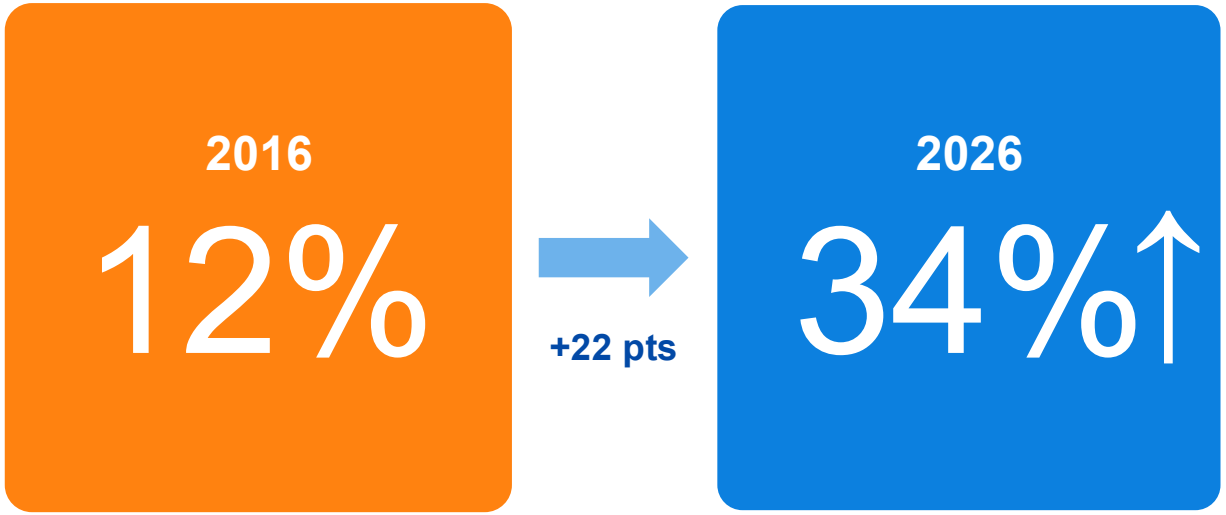


Source: 2026 Cox Automotive AV Research

03 Majority Expect to Step Up to Level 3+ for Next Purchase

Level 2 and 3 ownership nearly tripled

Own a Level 2 or 3 – 2016 vs. 2026



AV Brand Offerings

- Hands-free Level 2+ are offered across GM, Ford, BMW, Tesla, Nissan, Hyundai/Genesis, Rivian and Lucid
- Certified Level 3 remains confined to Mercedes and BMW flagship sedans

Source: 2026 Cox Automotive AV Research: IEA Global EV Outlook 2026; Statista Mobility Market Insights (2023 registrations); PARTS/MITRE ADAS market penetration, 2024; OEM announcements.

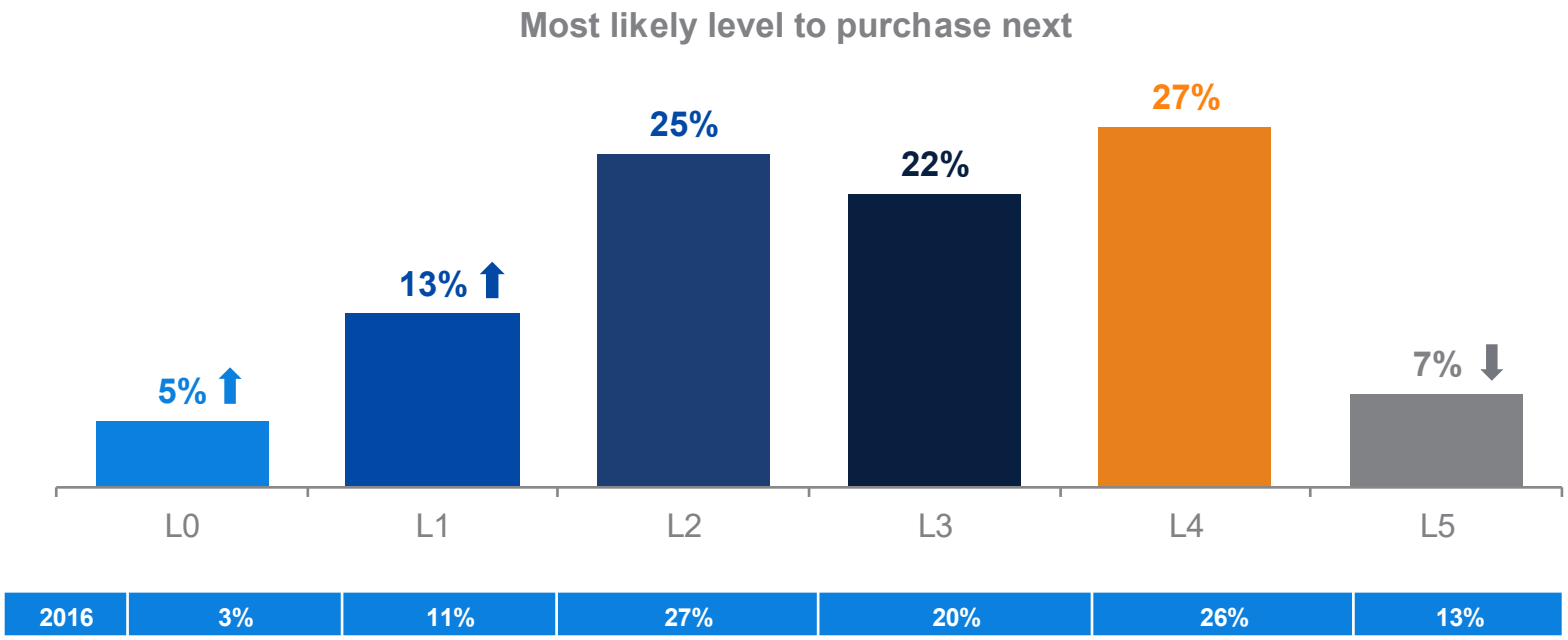
If all levels were available, most would buy Level 3+

Level Most Likely To Purchase Next, If All Levels Available On The Market

Would purchase a Level 3+ autonomous vehicle

57%

vs. 59% in 2016 — steady demand, **but interest in Level 5 has cooled**



Source: 2026 Cox Automotive AV Research

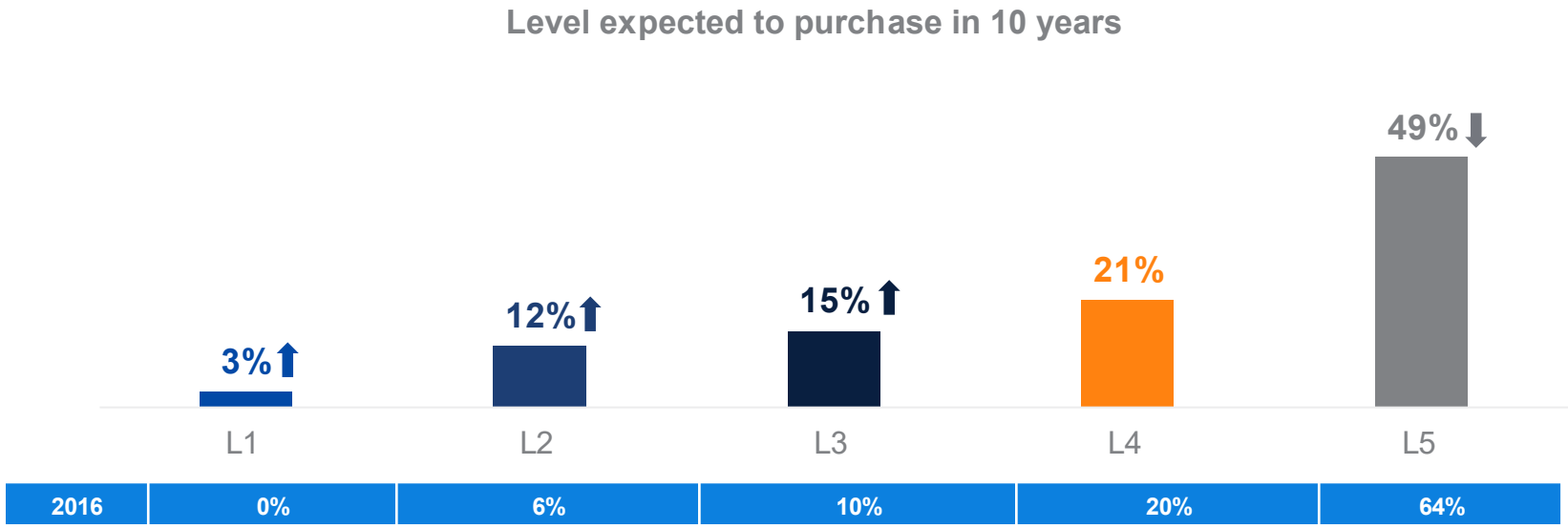
Level 5 remains the most commonly selected autonomy level for a future purchase, assuming availability

Level Expected To Purchase In 10 Years, If Available On The Market

Expect to purchase a Level 3+ vehicle in 10 years

85% ↓

vs. 94% in 2016 — **long-term appetite has softened**

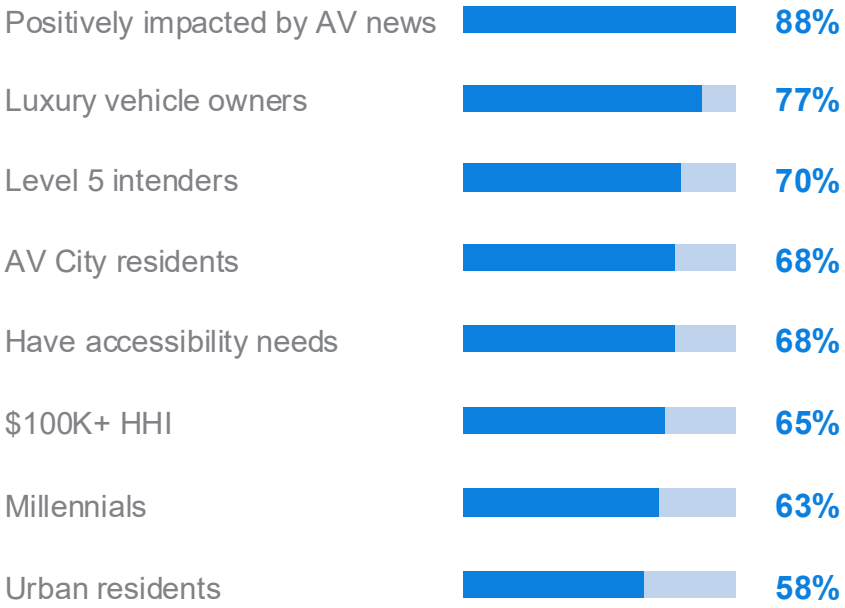


Source: 2026 Cox Automotive AV Research

AV shoppers are more likely to be affluent, urban and news-positive

Skews Millennial, urban and high-income — already living with Level 2

Most Likely To Purchase Level 3+



Average Year Consumers Expect To Purchase

Level 3 — Partial autonomy

2032

Level 4 — Full autonomy (+human)

2033

Level 5 — Full autonomy (no human)

2034

Source: 2026 Cox Automotive AV Research

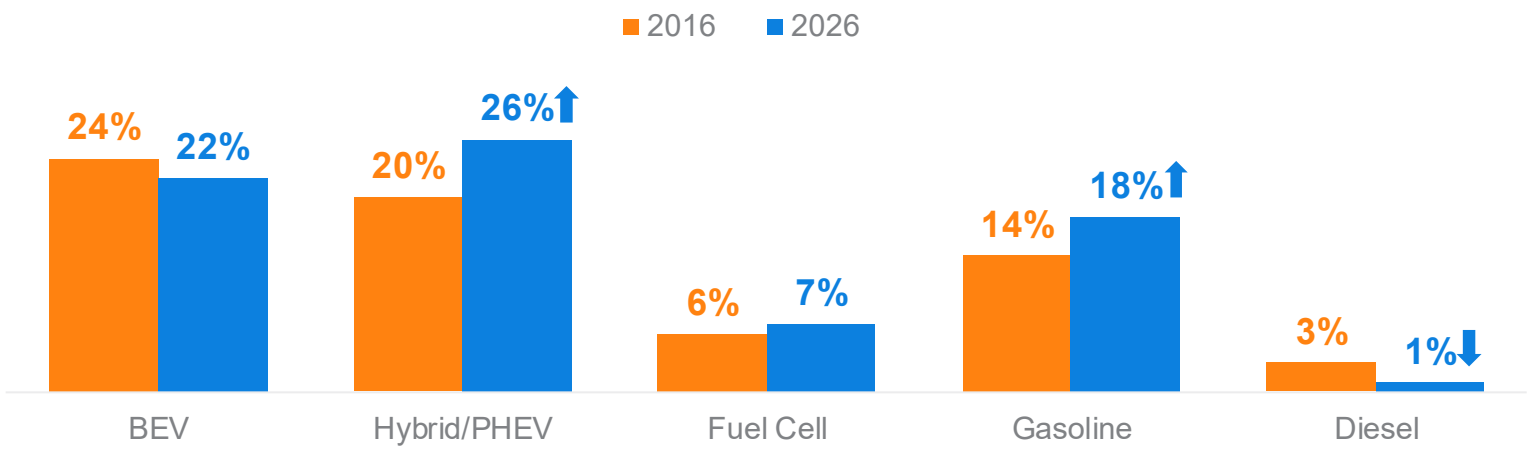
Consumers are more likely to expect AVs to have Hybrid and ICE options

Powertrain Consumers Think AVs Should Have

Think there should be alternative-fuel powertrains in AVs

55%↑

up from **50% in 2016**



Source: 2026 Cox Automotive AV Research

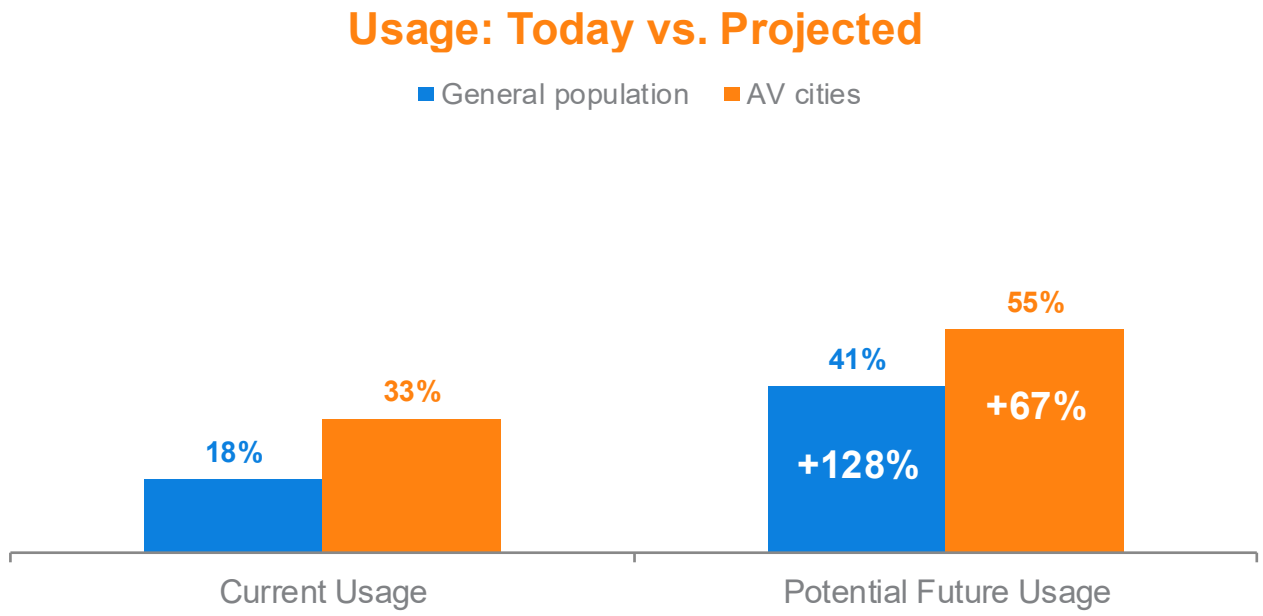
04 Comfort with Driverless Rides is Rising, but Robotaxi Use is Limited

Robotaxi awareness is substantial, and openness to future use exceeds reported current use

Aware Of Robotaxis

General population
70%

AV cities
89%



Source: 2026 Cox Automotive AV Research

Comfortable, calm, productive rides matter most to future robotaxi riders

What Drives Future Usage Intent

TOP TIER

1	Quiet, stress-free ride	49%
2	Ability to relax, work, or multitask	45%
3	Ease of booking and pickup	40%

TIER 2

4	Reliable, on-demand availability	39%
5	Lower or competitive pricing vs. other transportation options	36%
6	Smooth, safe driving experience	33%

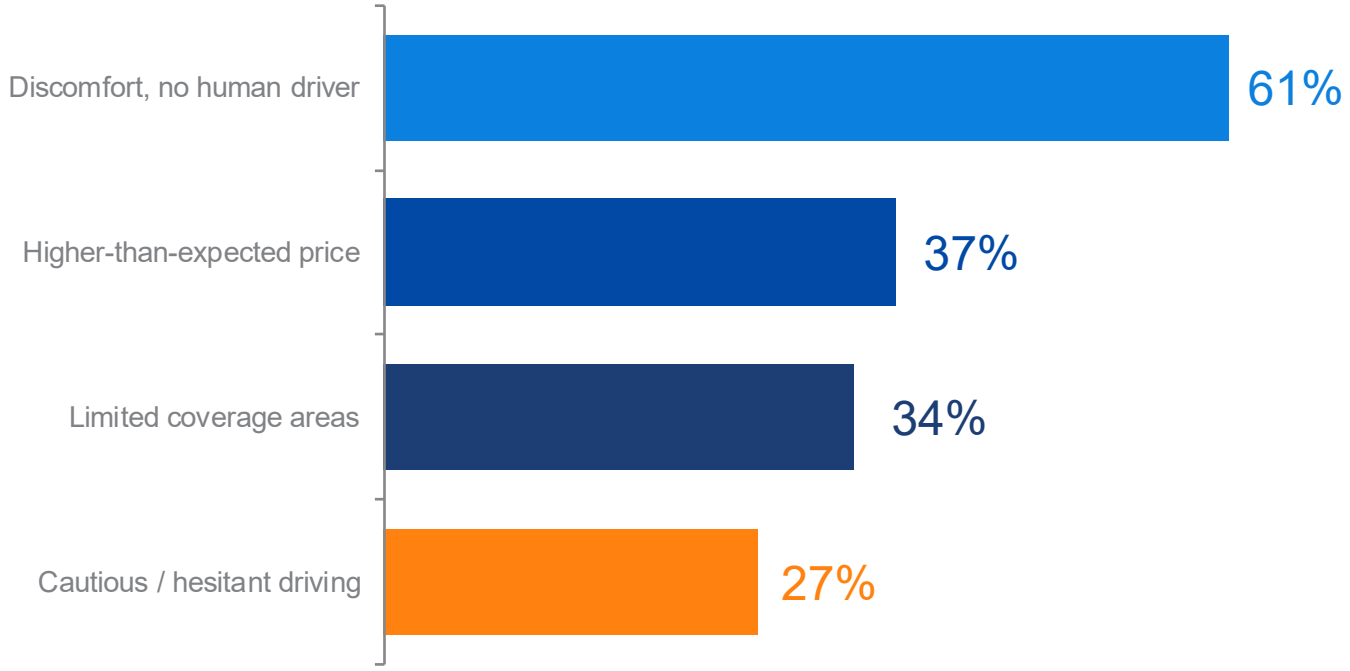
TIER 3

7	Reduce risk of human error	29%
8	No driver	26%
9	Feel cutting-edge	23%

Source: 2026 Cox Automotive Robotaxi Research

Discomfort without a driver and price are holding consumers back

Barriers To Leveraging Robotaxis



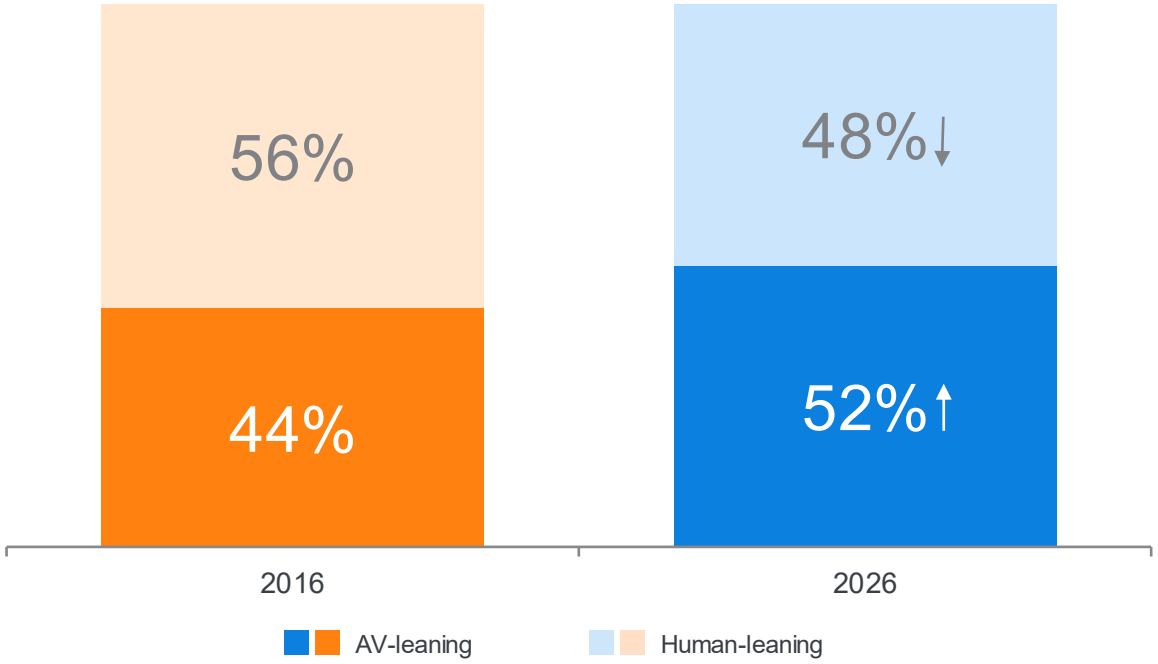
64%

require AVs to be significantly safer than a human driver — or 100% accident-free — before they'll commit.

Source: 2026 Cox Automotive AV Research, Robotaxi Research

Consumer preference has already crossed the line toward driverless

Prefer Self-driving Over A Human-driven Ride When Using Uber Or Lyft



39% vs. 44%

(% very/somewhat comfortable)
ride-hail users are as comfortable in AVs as riding in a vehicle driven by someone they don't know

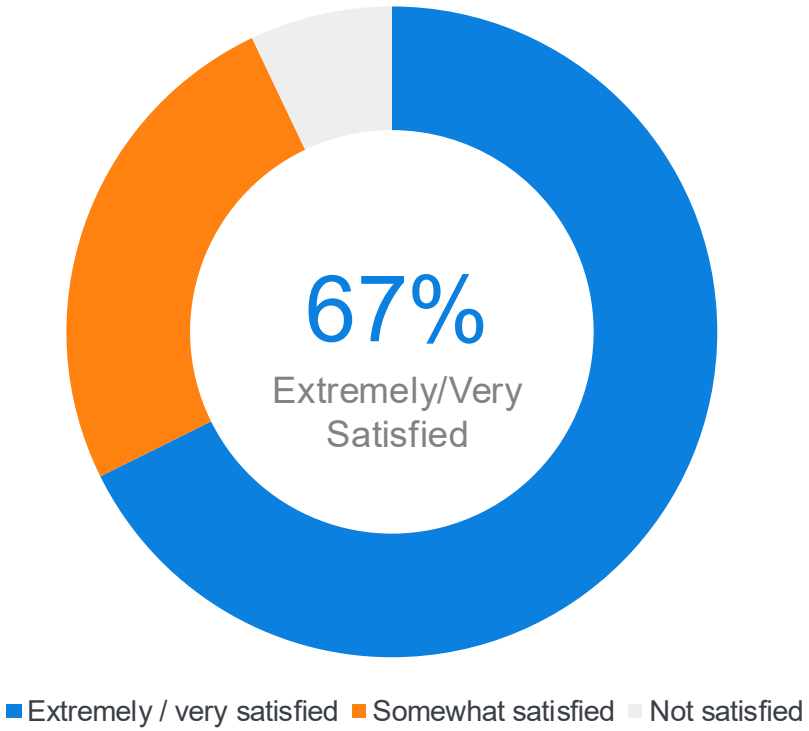
Will it revolutionize ride-hailing?

Yes — on a 2–5 year timeline. The incumbents' core asset, the human driver, is the very thing consumers are moving away from.

Source: 2026 Cox Automotive AV Research

Majority of robotaxi users would ride again

Satisfaction With Robotaxi Experience



83% say the ride improved their perception of AVs
89% in AV cities

83% would use robotaxis in the future
90% in AV cities

47% vs. 6%
would ride more vs. less
among current users who are open to future usage

Source: 2026 Cox Automotive AV Research, Robotaxi Research

Tesla is the leading brand in AV tech. Waymo gains the most momentum.

Brand Association with AV Technology

Tesla

MINDSHARE LEADER

66% (0%)

VS

Waymo

FASTEST GROWING

36% (+89%)

Usage among robotaxi users: 75%

Percentages in parentheses are growth compared to 2016

Source: 2026 Cox Automotive AV Research, Robotaxi Research

Robotaxi readiness is building – just not yet “today”

Soonest Would Ride In Level 5 Robotaxi

“WOULD RIDE TODAY”

12% → 14%

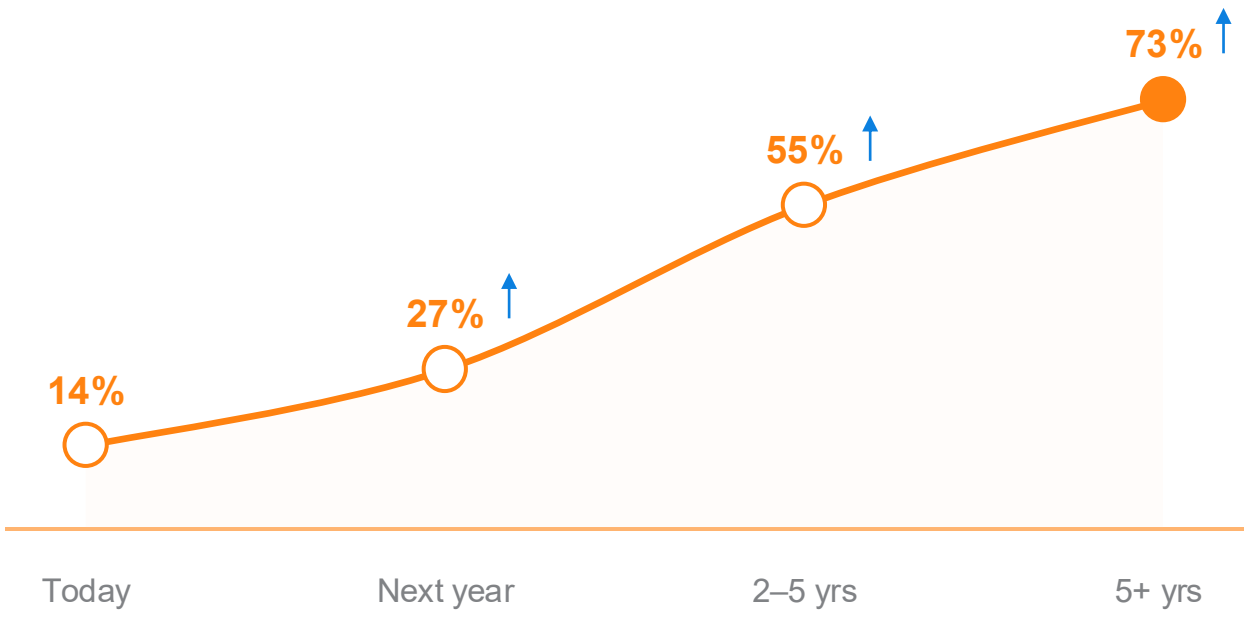
Barely moved since 2021

“NEVER”

35% → 27% ↓

Falling since 2021

Cumulative Share Who Would Ride



Source: 2026 Cox Automotive AV Research

Key Implications

Consumers are Ready to Move up the Autonomy Ladder – On Their Terms

1. **Awareness is Rising:** As understanding grows, consumers evaluate AVs more critically — awareness alone doesn't build trust; proximity does.

2. **Balance of Control and Safety:** Demand peaks where autonomy enhances the drive without removing control – Level 4 is the aspiration, Level 3 is the on-ramp.

3. **Step up to Level 3+ for Next Purchase:** The market is already climbing – buyers now expect assisted-driving features as table stakes, but affordability and proof set the pace.

4. **Robotaxi Comfort vs. Use:** Robotaxi adoption is gated by access and firsthand exposure, not appetite — experience converts skeptics faster than messaging.

THANK YOU!

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