

DIFFERENT
DRIVERS &
VEHICLES.
SAFETY FOR
ALL



Drive2The Future

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Why automated and connected vehicles?

Who are D2TF?

Who are IAM RoadSmart?

Driver Training Industry Survey and Findings

Discussion and Next Steps



H2020/EU - Main drivers for higher levels of Connected and Automated Driving:

Safety - Reduce accidents caused by human errors.

Efficiency & environmental objectives - Increase transport system efficiency and reduce time in congested traffic by new urban mobility solutions. Also, smoother traffic will help to decrease the energy consumption and emissions of the vehicles.

Comfort - Enable user's freedom for other activities when automated systems are active.

Social inclusion - Ensure mobility for all, including elderly and impaired users.

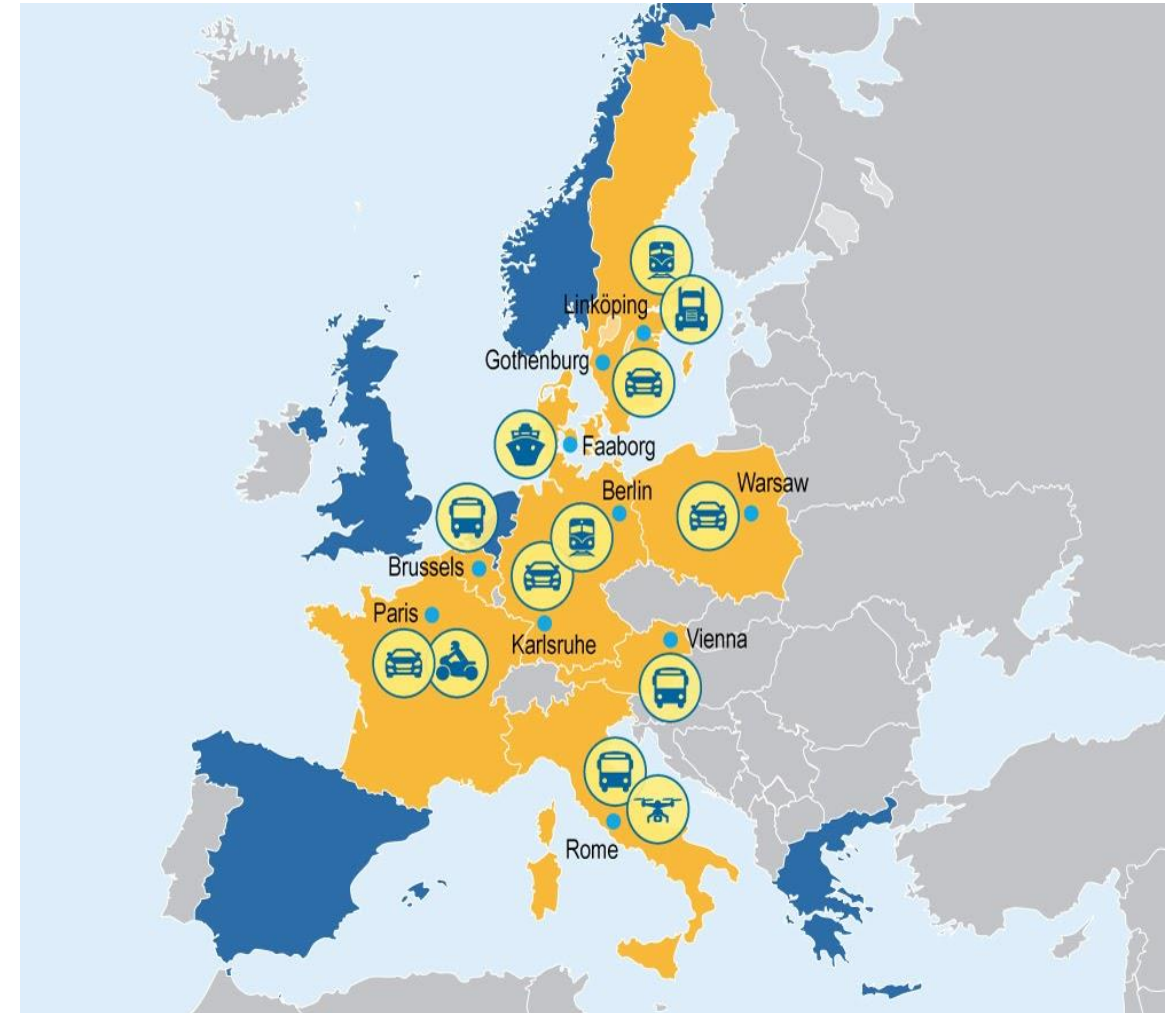
Accessibility - Facilitate access to city centres.

Who are D2TF

31 Partners including research institutes, universities, stakeholder groups and operators

10 Work streams

12 Pilots across Europe



Drive2theFuture's mission is to prepare “drivers”, travellers and vehicle operators of the future to accept and use connected, cooperative and automated transport modes and the industry of these technologies to understand and meet their needs and wants.

Drive2theFuture develops training, HMI concepts, incentives, policies and other cost efficient measures to promote connected and automated vehicles for all transport modes and with all types of users (drivers, travellers, pilots, VRUs, fleet operators and other key stakeholders),

Training

Identify the training needs of all user categories and define relevant training tools and material, along with training and certification schemes.

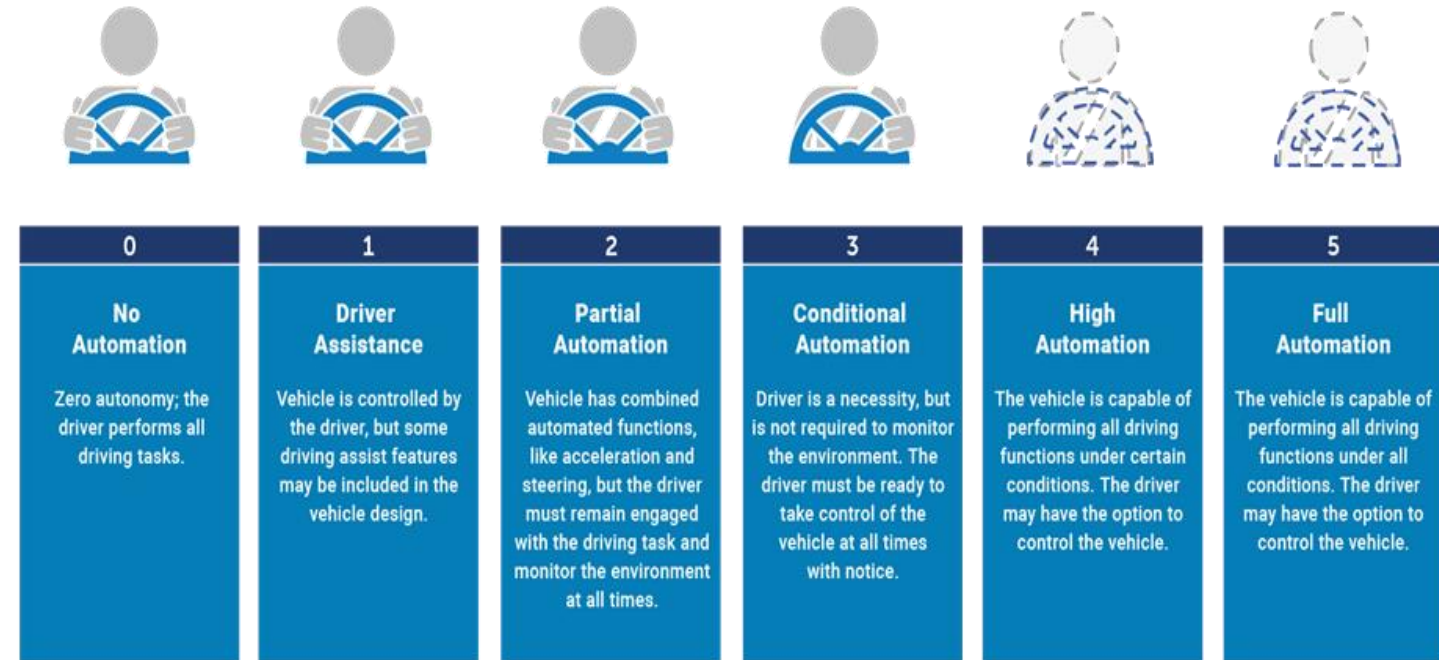
Training Materials

Several education modules developed and available via the D2TF website – currently mainly aimed at raising awareness

Materials will be developed for the driver training industry in line with the findings of our survey

SOCIETY OF AUTOMOTIVE ENGINEERS (SAE) AUTOMATION LEVELS

Full Automation





Who are IAM RoadSmart?

- IAM RoadSmart (previously IAM – the Institute of Advanced Motorists) is the UK’s largest independent road safety charity
- We are dedicated to improving standards and safety in driving and motorcycling
- We are best known for the ‘advanced test’ (voluntary and post licence only)
- IAM RoadSmart has over 82,000 members and is supported by a local volunteer network of around 180 groups in the UK.
- We provide driver training to businesses and also deliver Alcohol re education courses to UK government guidelines
- IAM RoadSmart’s policy and research division publishes original research on road safety issues.

A survey on the opinions of the European driver training industry on the impact of autonomous vehicles



This document reflects only the views of the author(s). Neither the Innovation and Networks Executive Agency (INEA) nor the European Commission is in any way responsible for any use that may be made of the information it contains.



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Demographics



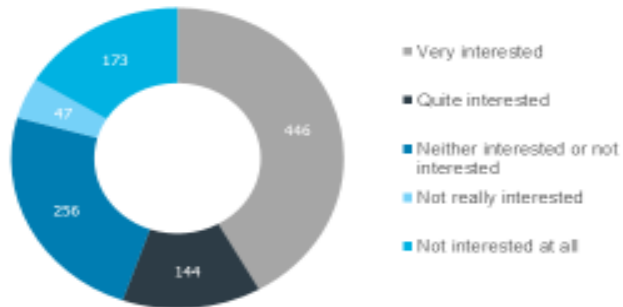
- The majority of respondents were male (81%, with 1.8% preferring not to say)
- 42% of respondents were aged 56-65 with those aged 40-55 making up 37% and 14% were over 65 years of age
- 55% of respondents change their training vehicle every 3 years

The countries where people completed the survey are as follows:

Albania (1)	Malta (1)	Slovenia (15)
Belgium (14)	Moldova (1)	Spain (32)
India (1)	Poland (34)	United Kingdom (1194)
Italy (5)	Portugal (1)	Remaining participants did not say



Q8: How interested are you in the development of autonomous vehicles?

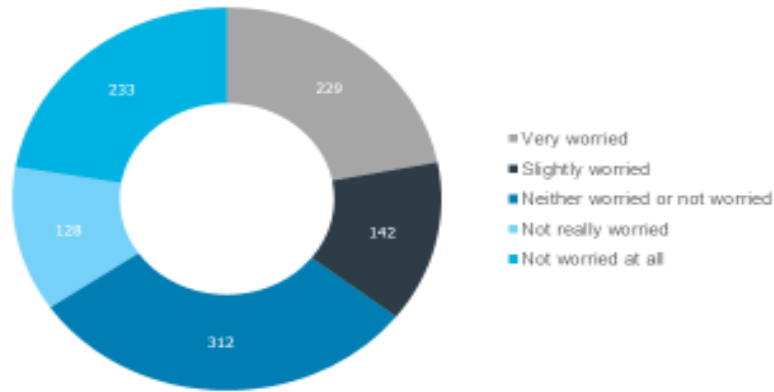


ANSWER CHOICES	PERCENTAGE	RESPONSES
Very interested	41.84%	446
Quite interested	13.51%	144
Neither interested or not interested	24.02%	256
Not really interested	4.41%	47
Not interested at all	16.23%	173
TOTAL		1066

- The majority of driver trainers tend not to seek out information on autonomous vehicles – the main source being what they have seen in the news (63%)
- 58% of driver trainers feel that they do understand the differences in the levels of autonomy to some extent
- 74% of respondents believe that they understand the difference between driver assistance systems and autonomous vehicle systems
- 23% of those who completed the survey believe autonomous vehicles will have a negative impact on society



Q17: Are you worried for the future of driving instructors with the prospect of increasingly autonomous vehicles on the horizon?

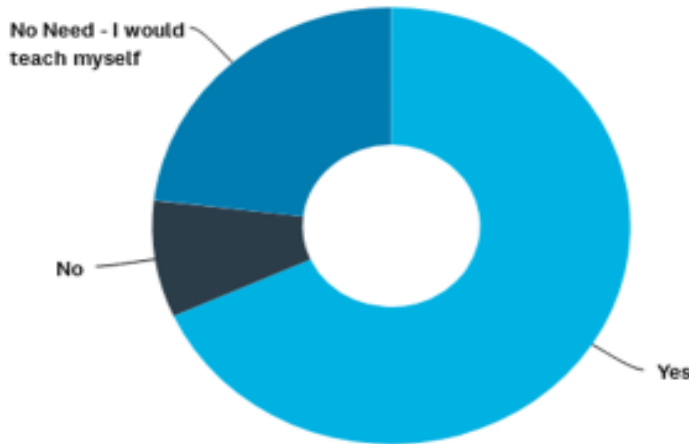


ANSWER CHOICES	RESPONSES
Very worried	21.93% 229
Slightly worried	13.60% 142
Neither worried or not worried	29.89% 312
Not really worried	12.26% 128
Not worried at all	22.32% 233
TOTAL	1044

- Slightly more than half of those who took the survey think autonomous vehicles will impact on their jobs
- 42% think there will still be a need for driver trainers in the future – but in a different role
- The majority of driver trainers think it is important to have a vehicle with the latest safety features, 61% think it is either very important or quite important.



Q20: When autonomous vehicles become more common place would you want training to help you understand how they work?



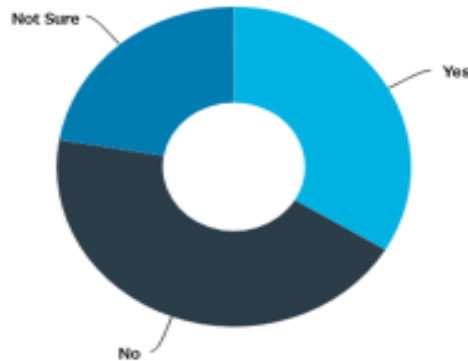
ANSWER CHOICES	RESPONSES	
Yes	68.25%	705
No	8.62%	89
No Need - I would teach myself	23.14%	239
TOTAL		1,033

When it comes to the gender divide:

- 77% of females answered yes compared to 67% of males
- 18% of females would teach themselves compared to 24% of males



Q23: Should driving instructors have to take an additional exam in order to teach someone to drive in an autonomous vehicle?

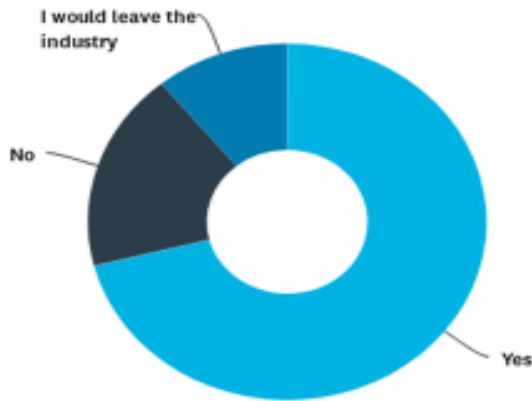


ANSWER CHOICES	RESPONSES	
Yes	33.69%	349
No	44.02%	456
Not Sure	22.30%	231
TOTAL		1,036

- 33% of respondents agreed that driver trainers should have to take an additional exam in order to teach someone to drive in an autonomous vehicle, with 44% against this
- 60% think if additional exams have to be taken that this would lead to a decline in those working in the industry, however if asked if they would take an exam 71% said yes they would.
- 63% do not think driving instructors should have to take an additional exam for ADAS systems



Q26: Would you personally take an additional examination if it was a requirement to be able to carry on teaching in a more intelligent and connected vehicle?



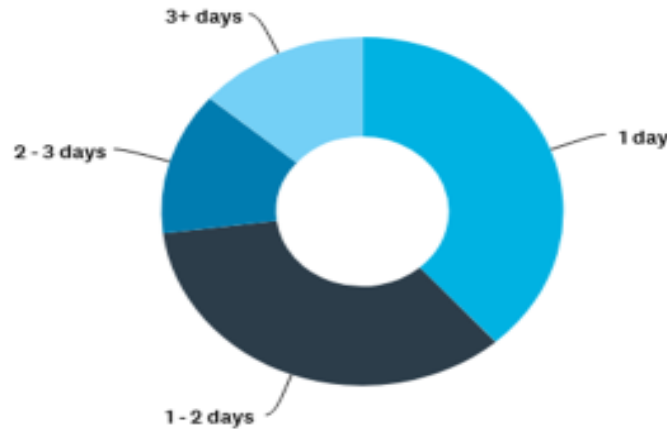
ANSWER CHOICES	RESPONSES
Yes	71.03% 733
No	18.12% 187
I would leave the industry	10.85% 112
TOTAL	1,032

When it comes to the gender divide:

- 81% of females would be happy to take an additional exam compared to 70% of males
- 12% of females would not be happy to do so compared to 19% of males
- However fewer females would leave the industry if they had to do an exam to continue 7.5% compared to 11% of males



Q28: What length of training course would you be prepared to consider on autonomous vehicles?



ANSWER CHOICES	RESPONSES	
1 day	38.48%	389
1 - 2 days	34.52%	349
2 - 3 days	13.25%	134
3+ days	13.75%	139
TOTAL		1,011

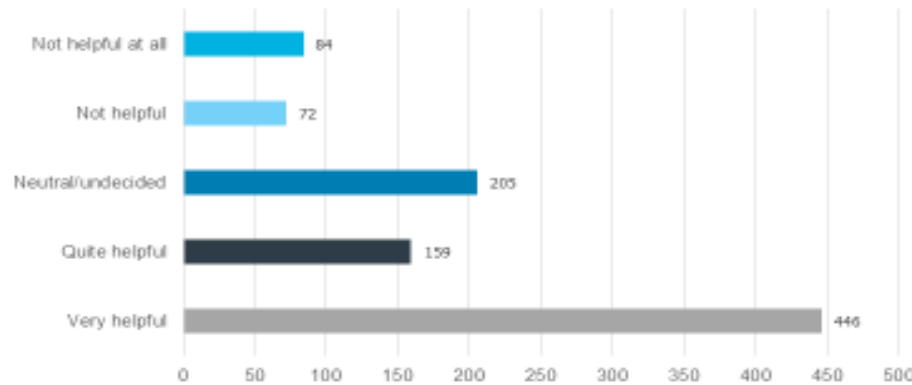
- The preferred length of training course for driver assistance systems seems to be 1 day with 1-2 days coming up second choice – 45% compared to 32%
- The preferred length of a training course for autonomous vehicles is similar with 38% saying one day and 34% saying one or two days
- A small majority (56%) felt an online course is enough to improve their knowledge of autonomous vehicles (43% feeling it would not be enough)
- 29% of females thought a one day course compared to 40% of males
- 42% of females thought 1-2 day course compared to 33% of males



Q30: When thinking about autonomous vehicles – Which learning tools would you like to assist you in training your pupils?



Online training programmes



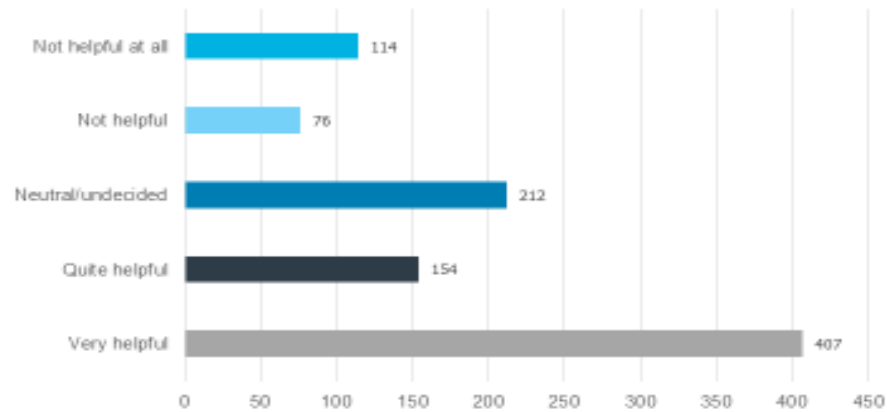
ANSWER CHOICES	PERCENTAGE	RESPONSES
Very helpful	46.17%	446
Quite helpful	16.46%	159
Neutral/undecided	21.22%	205
Not helpful	7.45%	72
Not helpful at all	8.70%	84
TOTAL		966



Q31: When thinking about autonomous vehicles – Which learning tools would you like to assist you in training your pupils?



An App



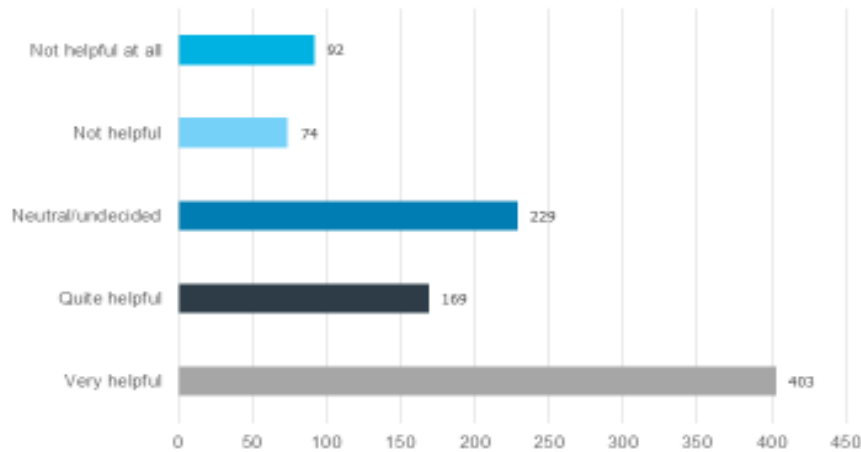
ANSWER CHOICES	RESPONSES	
Very helpful	42.26%	407
Quite helpful	15.99%	154
Neutral/undecided	22.01%	212
Not helpful	7.89%	76
Not helpful at all	11.84%	114
TOTAL		963



Q32: When thinking about autonomous vehicles – Which learning tools would you like to assist you in training your pupils?



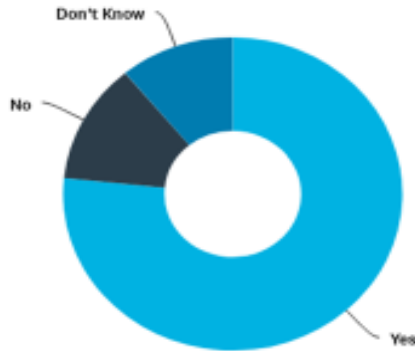
Dedicated Training book/manual



ANSWER CHOICES	RESPONSES	
Very helpful	41.68%	403
Quite helpful	17.48%	169
Neutral/undecided	23.68%	229
Not helpful	7.65%	74
Not helpful at all	9.51%	92
TOTAL		967



Q33: Do you think it is an instructor's job to ensure the learner has good knowledge about autonomous vehicles?



ANSWER CHOICES	RESPONSES	
Yes	76.65%	778
No	12.41%	126
Don't Know	10.94%	111
TOTAL		1,015

- The majority agree it is the driver trainers job to ensure the learner has good knowledge regarding autonomous vehicles 76%
- Those that took part were in favour of the purchase of an autonomous vehicle being subsidised in some way – 50% strongly agree on this, 10% agree and 22% disagree
- 84% think their government should include understanding new technology and vehicle safety features in a driving theory test
- 71% think their government should include how to operate driver assistance features in the practical driving test



Additional findings



- 68% say when autonomous vehicles become more common place they would want training to help them understand how they work, although 23% preferred to teach themselves
- Nearly 60% of driver trainers believe level 4 vehicles will be available in 2033 or before with 26% thinking they will be available by 2025
- 56% of participants said they have a level 1 or 2 vehicle currently. 6% say they have a level 3 vehicle and 5 people think they have a level 5 vehicle already!



Next steps:

Project completes in summer 2022

Exploitation plans

Produce and disseminate training materials for the driver training industry

Any questions?

www.drive2thefuture.eu

www.iam.org.uk



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