

# PAVE

2022  
ANNUAL REPORT



Photo: Cruise

[WWW.PAVECAMPAIGN.ORG](http://WWW.PAVECAMPAIGN.ORG)

# TABLE OF CONTENTS

<b>3</b>	About PAVE
<b>4</b>	From the Executive Director
<b>6</b>	Our Members
<b>7</b>	Big Picture
<b>8</b>	Engagement Snapshot
<b>9</b>	Impact and Reach
<b>10</b>	Initiatives and Activities
<b>15</b>	Governance

PAVE is a diverse coalition that unites industry partners, nonprofit groups, academics, and public sector entities who believe in the potential of automated vehicle technologies -- and understand the importance of education in realizing that potential.

This annual report outlines PAVE's activities, milestones and progress during 2022. We are proud of how far we've come, and we're looking forward to new opportunities in the year ahead.



# From the Executive Director

---

From the  
Executive  
Director

Much has changed in the automated vehicle industry since PAVE's launch in 2019. But one trend remains constant: consumers' increasing exposure to higher levels of automated vehicle technology.

Our Members

As of December 2022, over 40 companies had received permits to test autonomous vehicles in the State of California. Those with existing permits continued to expand their boundaries, and states across the U.S. have enacted AV-related legislation.

Big Picture

Additionally, lower levels of automation – vehicle technologies that are available for consumer purchase today, but that always require an attentive driver – are nearly ubiquitous. Increasing numbers of vehicles have standard ADAS features, and those features are becoming more sophisticated.

Engagement  
Snapshot

New vehicle technologies are, in many ways, good news: many of these features offer significant safety benefits for drivers and other road users. However, new technologies also drastically increase the need for consumer education. Consumer surveys, such as the 2022 survey that PAVE conducted along with J.D. Power and MIT's Advanced Vehicle Technology Consortium, show that these new technologies lead to consumer confusion: What is an autonomous vehicle? And what is a driver's responsibility in cars available for purchase today?

Impact and  
Reach

For PAVE, these questions underscore the need for our work: to raise the level of public understanding of automated vehicle technologies, and in doing so, to help create a transportation system that improves safety, that expands mobility options, that is environmentally sustainable, and that is more equitable.

**In 2022, we sought new ways to expand the conversation about our transportation future.**

Initiatives and  
Activities

We continued successful efforts from previous years, including our series of panel discussions, which have earned over 24,000 views on YouTube, and which won a national communications award at TRB in January. We also continued our robust industry engagement, appearing at over 18 conferences in 2022, and expanded our collaboration with our public sector and academic advisory council partners.

Governance

We also launched new initiatives, including a podcast, the PAVEcast; we began the first annual PAVE Essay Contest and Scholarship Program to encourage high school students to imagine what AVs could mean for their communities; and we started the PAVE Speakers Bureau to help share the voices of the incredible leaders in our coalition.

We also expanded our international presence in 2022, launching PAVE Canada – thanks to a generous grant from Transport Canada – and PAVE Europe. These new chapters reflect the reality that this industry is global, and the AV education challenge knows no borders.

Such initiatives have never been more important.

**Thankfully, if the growing commercialization of AV technology is one constant in a changing world, so is the commitment of PAVE’s members.**

None of our work is possible without you – not just your financial support, but your ideas, your energy, and your dedication to expanding public knowledge of these vital technologies and what they promise for our transportation future.

The diversity of this coalition continues to be one of its greatest strengths. PAVE includes established auto companies and Silicon Valley newcomers; nonprofit advocacy groups and academic experts; government entities and trade groups. This diversity is important because without it, we can’t have the honest, fact-based conversation with the public that we all know is essential. We share the conviction that without an informed and engaged public, AV technology will not achieve its potential – and by joining forces to build public understanding, PAVE members are rising to this challenge.

We at PAVE thank you – for your support of our efforts, and for your steadfast commitment to a safer, more sustainable, more equitable transportation future.

**Tara Andringa**  
PAVE Executive Director



Our Members

Big Picture

Engagement  
Snapshot

Impact and  
Reach

Initiatives and  
Activities

Governance



# Our Members

From the Executive Director

Our Members

Big Picture

Engagement Snapshot

Impact and Reach

Initiatives and Activities

Governance



# Big Picture

2022 was a significant year of growth for PAVE, with the launch of PAVE Canada in February and the launch of PAVE Europe in March. These new chapters highlighted the global nature of the need for public AV education and affirmed the value of an ecosystem-wide educational partnership. We enjoyed the post-pandemic return to in-person events, with 18 conference appearances across the country. As we got back on the road, we also continued our successful virtual panel series – which won a national communications award at the start of the year – and launched our podcast, the PAVEcast.

73

PAVE members

384%

growth in membership since launch

27%

of PAVE members are nonprofits

18

2022 conference appearances

38%

of PAVE members are start-ups

From the Executive Director

Our Members

Big Picture

Engagement Snapshot

Impact and Reach

Initiatives and Activities

Governance

# Engagement Snapshot

**505K**

impressions across platforms

**36%**

growth in social media audience

**9.5K**

Youtube views in 2022

**2K+**

PAVEcast downloads

**82.2%**

increase in overall social media engagement rate

From the Executive Director

Our Members

Big Picture

Engagement Snapshot

Impact and Reach

Initiatives and Activities

Governance



# Impact and Reach

## ➤ Virtual Panel Audience

PAVE continued to build on its successful series of virtual panels, surpassing 100 panels completed. PAVE won a national communications award at the TRB conference for its panel series.

- Nearly 5,000 registrations for PAVE panels in 2022.
- More than 4,000 views of PAVE's panels on YouTube.

**34**

PAVE virtual panels held in 2022

**102**

panels completed since the series began in 2020.

**4K+**

views of PAVE's panel recordings on YouTube in 2022

## ➤ Website and social media

In 2022, PAVE's social media audience grew by over 36%, and the PAVE resource library expanded to nearly 1,000 educational resources.

## ➤ PAVEcast

In January 2022, PAVE launched its podcast, the PAVEcast. In twelve months, we recorded 45 episodes, and listeners across 46 countries downloaded the PAVEcast nearly 3,000 times. It is in the top 5% of Apple podcasts.

## ➤ PAVE Newsletter

PAVE's newsletter has nearly 3,000 subscribers.

## ➤ Media Engagement

In 2022, PAVE's work was mentioned in news stories worldwide, including publications such as MSN, The Washington Post, The Associated Press, Consumer Reports, Automotive News, and many others.

From the Executive Director

Our Members

Big Picture

Engagement Snapshot

Impact and Reach

Initiatives and Activities

Governance

# Initiatives and Activities

## ➤ Weekly Panels

PAVE's successful virtual panel series, which began in 2020 as the pandemic stalled in-person events, continued with great success in 2022. In January, PAVE received a TRB award for outstanding public communications for the video series.

PAVE has hosted 102 panels since the series began, and we've received more than 18,000 panel registrations and more than 24,000 views of the recordings on YouTube.

The panels cover broad topics across the AV ecosystem and share diverse voices, addressing themes such as how AV technology works, how communities can prepare for the technology, how AVs are tested, and how the technology may affect society.



From the  
Executive  
Director

Our Members

Big Picture

Engagement  
Snapshot

Impact and  
Reach

Initiatives and  
Activities

Governance

## ➤ Public survey with J.D.Power and M.I.T

PAVE again teamed with J.D. Power and M.I.T's Advanced Vehicle Technology Consortium in 2022 for a second annual nationwide survey of public attitudes toward AVs, titled the J.D. Power 2022 Mobility Confidence Index.

The survey tracks the accuracy of the public's knowledge of AV technology, their comfort level with the concept of automated vehicles, and the roadblocks to consumer acceptance.

Our Members

Big Picture

Engagement Snapshot

Impact and Reach

Initiatives and Activities

Governance

The survey found

# 76%

of respondents would like more information on how AV technology meets standards.



Some key findings of the survey:

- Approximately 65% of consumers possess inaccurate knowledge of the definition of fully automated, self-driving vehicles.
- Education is needed: 56% of respondents incorrectly classified the driver-assist technologies available today as fully automated, self-driving technologies.
- Approximately one-fourth (26%) of consumers say they use active driving assistance, and findings indicate that repeated ADAS usage is associated with comfort with higher levels of automation.
- Consumers are slightly more comfortable with goods being transported in self-driving vehicles compared to themselves riding in one.

The survey included the views of 4,000 U.S. vehicle owners, age 18 and older.

## ➤ PAVE Canada and PAVE Europe

PAVE expanded its international footprint in 2022 with the launch of PAVE Canada in February and the launch of PAVE Europe in March. Recognizing that the need for public education about automated vehicles is a global challenge, these organizations will help to expand PAVE’s educational mission to new audiences.



PAVE Canada was possible thanks to a generous grant from Transport Canada, which funded the organization’s launch, a public survey of AV attitudes across the country, and a social media campaign to help address some of the areas of confusion identified by the survey.

PAVE Europe launched in March at the Autonomy conference in Paris with six founding partners: Achmea, EasyMile, Mobileye, TÜV Rheinland, Swiss RE, and Waymo.

## ➤ PAVEcast

In January, PAVE launched a podcast, the PAVEcast, which provided a new medium for sharing PAVE’s panel series as well as interviews with PAVE members and other AV experts and leaders.

In the first year, we recorded 45 episodes. Thanks to listeners



across 46 countries, the PAVEcast had nearly 3,000 downloads and, as of late 2022, was in the top 5% of Apple podcasts.

## ➤ PAVE Essay Contest and Scholarship Program

In an effort to bring young people into the AV discussion, we launched the first annual PAVE Essay Contest and Scholarship Program in 2022. The contest challenges high school students to imagine an AV future and write about what this could mean for their communities.



Three geographically-diverse communities were selected as the contest sites for the 2022-2023 contest: Washington, D.C.; Albuquerque, NM; and Southeast Ohio. Several generous PAVE members – TORC, STEER, DriveOhio, and Transportation Research Center, Inc. – are providing scholarships for the winning entrants.

## ➤ PAVE Speakers Bureau

One of the important ways that PAVE shares its educational messaging is through the voices of its diverse membership, who speak about automated vehicle technologies and their potential to improve the safety and mobility of our transportation system. In order to help facilitate these conversations, PAVE launched a speakers bureau in 2022.



The PAVE Speakers Bureau helps to connect event organizers with some of the foremost leaders in the AV ecosystem, including experts across industry, academia and the public sector.



## ➤ Speakers and Panels

PAVE has participated in many events worldwide, including providing speakers and panels. PAVE's 2022 events included:

- TRB (panelist)
- TRB Award and Lectern session
- Automotive News Canada podcast (guest)
- Lifesavers (panelist)
- Autonomy Paris (panelist)
- CARSP Webinar (panelist)
- Future of Mobility podcast (guest)
- NAFA 2022 Institute and Expo Virtual Event (panelist)
- CIECA Webinar (panelist)
- Netherlands Consulate trade mission presentation (presenter)
- Florida AV Summit (moderator)
- AASHTO CAV group (presenter)
- SEMI GAAC meeting (presenter)
- GHSA Annual Meeting (panelist)
- Reuters Auto 2022 (moderator)
- International Road Federation Training Session (presenter)
- PA AV Summit (keynote speaker)
- International Road Federation (presenter)
- Canada CAV Webinar (presenter and moderator)
- MN CAV Committee (presenter)

From the Executive Director

Our Members

Big Picture

Engagement Snapshot

Impact and Reach

Initiatives and Activities

Governance



# Governance

## Board of Directors

PAVE's diverse Board of Directors includes leaders from a broad array of AV stakeholders, representing the automotive and tech industries, advocacy groups, insurers, and consumer organizations.

“It has never been more urgent to educate the public, political institutions, and then media about the dramatic potential and current realities surrounding automated driving systems. That’s the steadfast commitment of Partners for Automated Vehicle Education and the members who banded together to share how this transformational technology is being carefully tested, steadily deployed and opening new opportunities for those among us who badly need new mobility options.”

**Brad Stertz**  
PAVE Chairman  
Director of Government Affairs  
Audi of America



## Organizations represented on PAVE's 2022 Board:

AAA  
Audi of America  
Aurora  
Consumer Technology Association  
Cruise  
Ford  
INRIX  
Intel  
Locomotion  
Luminar  
Mobileye  
Motional  
NADA  
National Council on Aging  
National Federation of the Blind  
Plus  
Securing America's Future Energy (SAFE)  
STEER  
Toyota  
United Spinal  
Woven Planet  
Zoox

From the  
Executive  
Director

Our Members

Big Picture

Engagement  
Snapshot

Impact and  
Reach

Initiatives and  
Activities

Governance

# PAVE Committees and Working Groups

PAVE's committees are all member-led, and the committees' work drives the messaging and direction of the organization. The committees include the Communications Committee, the Events Committee, and the Public Sector Engagement Committee. PAVE also convenes two working groups, one focused on trucking and freight and the other focused on insurance.

## Advisory Councils

PAVE maintains two advisory councils, an Academic Advisory Council and a Public Sector Advisory Council, that provide insight from leaders who believe in the coalition's mission to educate the public about AVs and their potential societal effects.

### Advisory Council leadership



Dr. Jeffrey Michael  
Johns Hopkins University  
PAVE Academic Advisory Council Chair



Ashley Nysten  
Colorado DOT  
PAVE Public Sector Advisory Council Chair

The councils include a diverse array of experts from many backgrounds, geographic locations, and fields of study.

PAVE's advisory councils include representation from

30

states

28

colleges and  
universities

4

countries

From the  
Executive  
Director

Our Members

Big Picture

Engagement  
Snapshot

Impact and  
Reach

Initiatives and  
Activities

Governance

[pavecampaign.org](http://pavecampaign.org)