ECONOMIST ENTERPRISE

Safety in motion:

Driving trust in modern mobility

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Contents

Foreword from Brembo

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In modern mobility, safety and trust are becoming inseparable. Ensuring that trust reflects the real capabilities of technology is the challenge at the heart of this report.

For decades, the mobility industry has made extraordinary progress through innovation. Vehicles today are more advanced, more intelligent and, in many respects, safer than ever before. Yet lives continue to be lost on roads around the world, reminding us that technology alone cannot eliminate accidents.

Today, the future of mobility safety depends not only on better technology, but also on how people understand, trust and use it. As vehicles become increasingly connected, automated and software-defined, safety is no longer the responsibility of individual components or organisations alone. It is the outcome of an entire ecosystem working together.

That is why this independent research report by Economist Enterprise is critical. It helps to better understand how people perceive safety, how those perceptions compare with the views of those who design, develop and regulate mobility systems, and what this means for the future of mobility.

The findings reveal a challenge that deserves our collective attention: a gap between perceived and real-world safety. Closing that gap requires more than technological progress. It calls for responsible innovation, transparent communication and closer collaboration between industry and policymakers to ensure regulation evolves alongside technology.

We hope this report contributes to that conversation. It also reflects our belief that business has a responsibility not only to develop better technologies, but to help shape a future in which road accidents become increasingly rare.

While no single company or institution can transform mobility safety alone, together, through innovation, collaboration and understanding, we can meaningfully drive change.

About this report

Safety in motion: Driving trust in modern mobility is an Economist Enterprise report, supported by Brembo. It draws on a proprietary survey of 6,157 respondents across ten markets—Brazil, China, France, Germany, India, Italy, Japan, South Korea, the UK and the US—conducted between April and May 2026. The respondents were made up of 5,135 members of the general travelling public and 1,022 industry professionals with direct roles in the mobility sector, spanning vehicle manufacturing, technology, infrastructure and transport policy. Respondents were distributed evenly across the ten markets. Findings were supplemented by a structured literature review and an advisory board programme convening leading experts across road safety, data governance, human-machine interaction and transport policy. Our thanks are due to the following experts, listed in alphabetical order, for their time and insights:

- **Alexander Moser-Haas**, head of the policy and transport department, German Road Safety Council
- **Dan Hennessey**, director, transportation and public works department, City of Santa Rosa Transportation and Public Works, Santa Rosa
- **Davide Shingo Usami**, researcher, Sapienza Università di Roma
- **Geetam Tiwari**, professor at the department of civil engineering, Transportation Research and Injury Prevention Centre, IIT Delhi
- **Kai Wang**, professor of intelligent transportation, Tsinghua University
- **Luca Pascotto**, road safety and global advocacy head, Fédération Internationale de l'Automobile (FIA)
- **Luis Antonio Lindau**, director of the cities program, World Resources Institute (WRI) Brasil
- **Priti Gautam**, senior transport specialist, Asian Development Bank (ADB)
- **Reinhard Stolle**, director business unit mobility, Fraunhofer Institute for Cognitive Systems IKS, Germany
- **Yoann Le Petit**, strategy and positioning lead, EIT Urban Mobility

This Economist Enterprise report examines the distance between mobility safety and public trust in it, why the people travelling in these systems feel safer than the people running them, and what it will take to bring those two realities into alignment. *Mobility safety*, as used here, refers to the systems, technologies and rules that determine how safe people are when travelling across all modes of transport. *Trust* is a subtler measure of how safe people feel, and whether that feeling reflects how systems actually perform.

This report was produced by a team of Economist Enterprise researchers:

- **Pratima Singh**, project director
- **Ailia Haider**, project manager
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- **Adam Green**, editor
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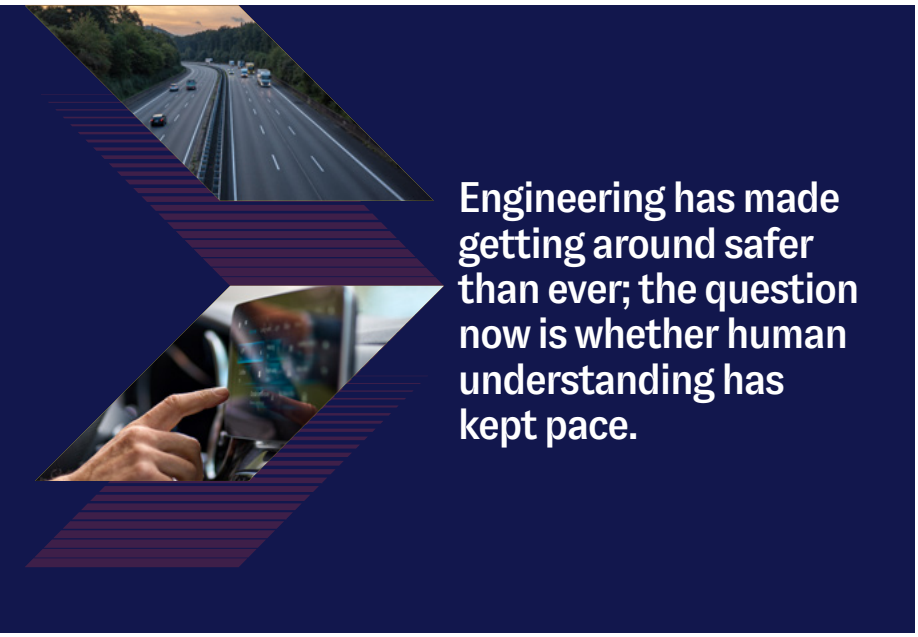
Executive summary

Engineering has made getting around safer than ever; the question now is whether human understanding has kept pace. Better brakes, stronger structures and smarter crash protection have lowered the risk of getting around dramatically over the past decades, and a new generation of driver assistance and automation promises to reduce the dangers even further. The most advanced mobility systems today, from private vehicles to public transport networks, can respond faster than human reaction, maintain course without intervention, anticipate hazards before they register and monitor user blind spots.



Yet the challenge is no longer just making mobility systems safer. As vehicles take on more functions, is user awareness being eroded, and do users really understand the performance limits of these vehicles? What measures should regulators take to avoid a crisis ensuing from this mismatch in safety reality and perception?

This report determines that the public may be overestimating the safety of mobility automation technologies, while safety institutions are failing to seize a timely opportunity to strengthen safety regulation.

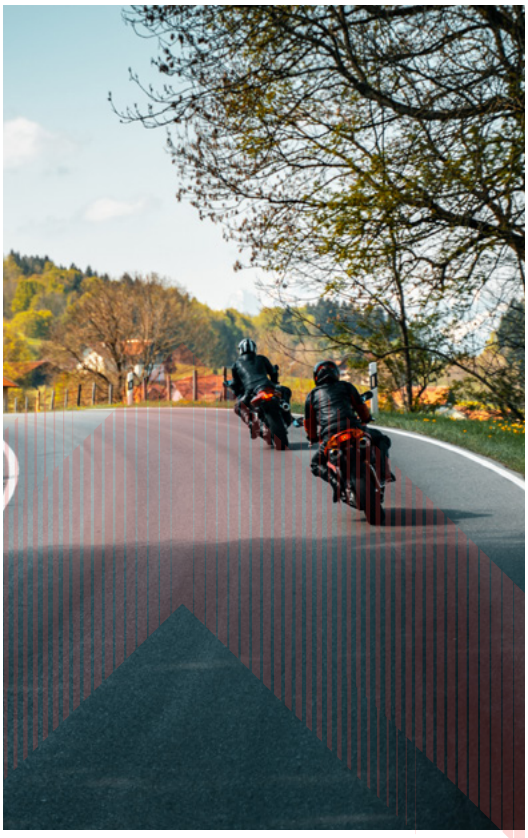
Key findings from the research include:

- **Mobility users feel safe, but the people running the system are still concerned. Nine in ten** people report high confidence in their day-to-day travel, with Millennials and high-income groups the most assured. That figure falls to just **45%** among the engineers, policymakers and operators behind those systems.
- **Human-system interaction is the biggest safety risk.** Only **3%** of professionals identify mechanical failure as the leading cause of mobility safety issues, while **30%** point to human misunderstanding of automated systems. The Insurance Institute for Highway Safety rated 11 out of 14 partial automation systems poorly for driver-engagement safeguards, underscoring how a vehicle can pass every technical standard but still fail the moment a driver stops paying attention.

- **Safety messaging may be outpacing reality.** Across industry professionals, including manufacturers, technology companies, ride-hailing operators and public bodies, **65%** express concerns that advertising overstates what systems can do. Users absorbing these messages may become less vigilant, but without mandatory capability disclosure, makers may be less likely to voluntarily pull back the practice of overclaiming.
- **Industry-regulator coordination needs to improve, cited by 68% of professionals as the most common point of failure.** The economic stakes are substantial: the World Bank's Global Road Safety Facility estimates that road crashes cost between 0.56% of UK GDP and 4.73% of China's, annually. Where coordination is effective, results follow: with its road rating, the International Road Assessment Programme has prevented roughly 700,000 deaths and serious injuries across 74 countries.
- **Trust breaks differently in different markets.** User confidence, industry confidence and fatality experience cluster the surveyed markets into four archetypes: optimists (Brazil, China, India), guardians (Japan, South Korea), pragmatists (France, Germany, Italy) and negotiators (the UK, the US). Each archetype responds to different signals and breaks under different pressures.
- **The public would support tighter safety rules.** Our survey found that **88%** of users would endorse slower speed limits, wider use of speed cameras and paying more for safer travel, while simultaneously rating the current system's accountability, enforcement and reporting as fairly low. The mandate for institutional action exists within a window of opportunity that must be seized soon.

The cost of confidence

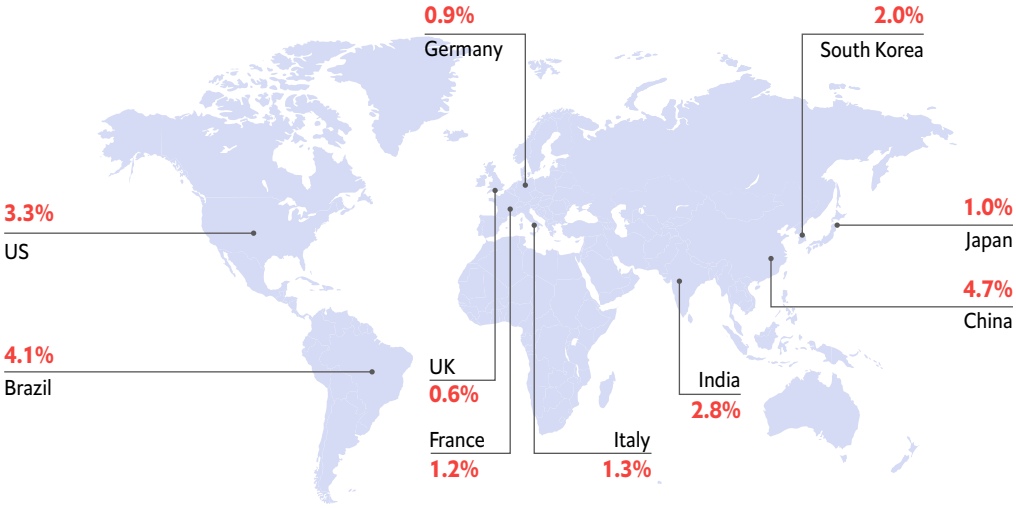
Every year, almost 1.2 million people die as a result of road traffic crashes. Across the ten markets surveyed for this research—Brazil, China, France, Germany, India, Italy, Japan, South Korea, the UK and the US—road crashes collectively claim hundreds of thousands of lives every year and injure millions more. The picture is uneven. India recorded around 173,000 road deaths in 2023—an average of one fatality every three minutes—representing a 2.6% rise from the previous year, bucking the modest global trend of improvement.[1] Brazil recorded more than 34,000 fatalities in 2023, a reversal of earlier progress, with motorcyclists accounting for the majority of victims.[2] In the US, an estimated 39,345 people died in traffic crashes in 2024, the first time since 2020 that the figure fell below 40,000, yet total fatalities remain significantly higher than a decade ago.[3] Some markets have made more sustained progress: South Korea halved the number of road deaths between 2012 and 2022, even as the number of registered vehicles rose by more than 30%,[4] while China's age-adjusted road traffic mortality fell from around 20.9 to 12.9 deaths per 100,000 between 2004 and 2020.[5] In Europe, however, progress has stalled: road deaths across France and Italy have marginally fallen since 2019, with both countries off track to meet the EU's target of halving fatalities by 2030.[6] Globally, road traffic crashes remain the leading killer of children and young people aged 5 to 29.[7] This statistic renders the aggregate death toll not merely a policy failure, but a societal one.



Beyond the human toll, road crashes also impose a substantial economic burden. In aggregate, that cost is staggering. Measured against the socio-economic cost of absorbing road crash fatalities and serious injuries, road crashes represent a burden that ranges from 4.73% of GDP in China and 3.30% in the US at the higher end to 0.56% in the UK, 0.88% in Germany and 0.97% in Japan[8] at the lower end.

Figure 1. Crashes carry a cost

Economic impact of road traffic fatalities and serious injuries (road crash cost to GDP, % GDP equivalent)

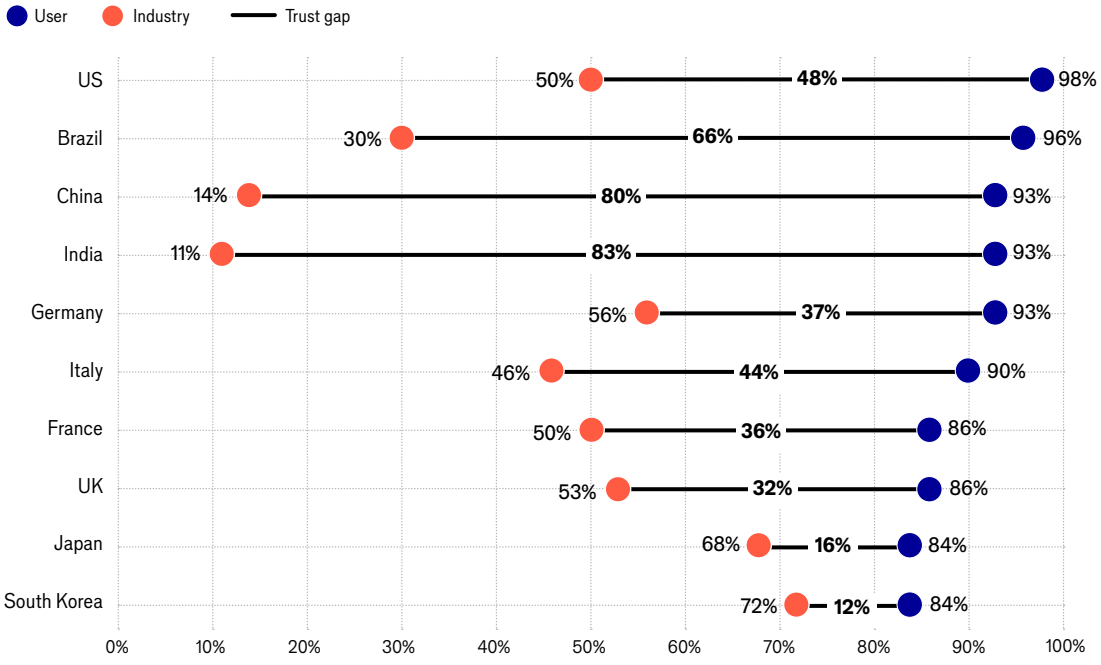


Source: Global Road Safety Facility (GRSF) Road Crash Cost Analysis Tool (2024)

The people who feel least safe about mobility are, by and large, the ones who know most about the systems underpinning it. While nine out of ten individuals across the ten surveyed markets say they feel safe with their day-to-day transport, that number drops to just 45% when surveying just the engineers, policymakers and operators behind those systems.

Figure 2. The trust gap

Percentage of respondents who respond "Quite a lot - I generally feel safe" or "Completely - I feel fully safe and reassured" to survey question "In your day-to-day transport, how much do you trust that mobility systems keep you safe?"



Source: Economist Enterprise *Driving trust in mobility safety* user and industry professional surveys (2026)

While nine out of ten individuals across the ten surveyed markets say they feel safe with their day-to-day transport, that number drops to just 45% when surveying just the engineers, policymakers and operators behind those systems.

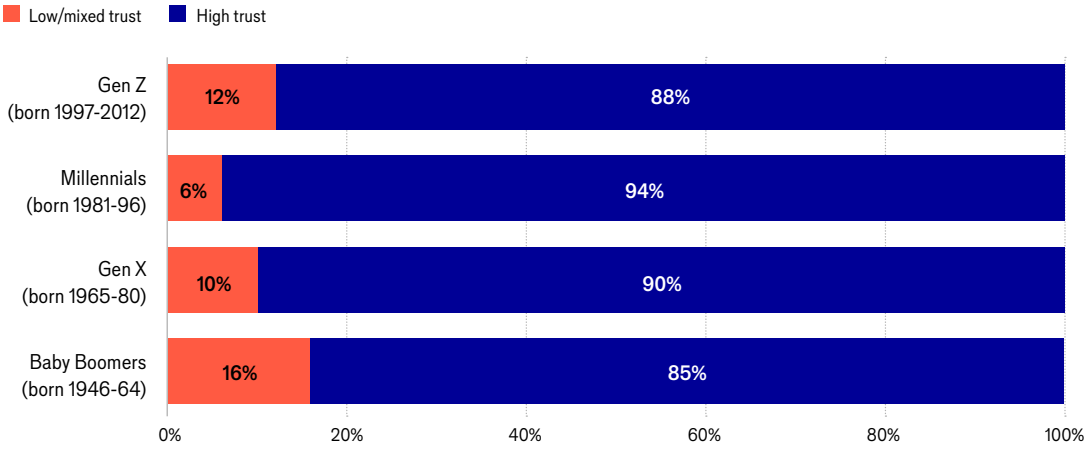
The demographics of trust

Age shapes what people expect from mobility safety. Millennials (born 1981-1996) are the most trusting, with 94% of respondents to our survey reporting high confidence. Having come of age alongside many new technologies, such as smartphones and digital platforms, Millennials generally feel open[9] to the kinds of innovations being embedded into modern travel.[10] Positive perceptions of technology tend to increase with more hands-on experience, a dynamic that works in Millennials' favour, given how deeply embedded digital tools have become in their daily lives.[11,12]

Gen Z and Baby Boomers, while still optimistic about their safety, are the least trusting age groups, with 12% and 16% respectively reporting low or mixed confidence, but their concerns differ. Gen Z (born 1997-2012) are active stakeholders who hold companies accountable for their societal impact and demand ethical, transparent technology, which are concerns that extend naturally into mobility. Trust in artificial intelligence (AI) is declining fast among this cohort, who are approaching technology much more cautiously than expected.[13,14] Buy-in to companies' ethical AI messaging dropped from 81% to 65% among Gen Z between 2023 and 2024, indicating growing scepticism about corporate responsibility claims.[15] Moreover, when asked about current mobility and transport safety technologies and their impact on safety, 10% of Gen Z say that they are either ineffective or have mixed effectiveness, and in some instances may even introduce new safety risks, compared with only 3% of Millennials.

Figure 3. Generational mistrust

Users' responses to survey question "In your day-to-day transport, how much do you trust that mobility systems keep you safe?" (by age group)



Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

Meanwhile, Baby Boomers (born 1946-64) seek independence. Research exploring older adults' perspectives on autonomous driving finds that readiness for automation is generally low, with most preferring no automation to driver assistance, while analysis highlights mistrust and a strong desire to remain in control as barriers.[16] As Baby Boomers age and potentially lose the ability to drive, they experience greater levels of physical and mental health challenges through loss of independence and social isolation. Public transport systems can be inaccessible and automated solutions too alien. For this group, positive mobility experiences are linked to control.[17] The most serious safety risk to this cohort when using transport safety features is a lack of clarity on what the features can and cannot do (ranked as the leading risk by 15%) while the top risk for other groups is consistently that users are relying on technology too much instead of staying attentive.

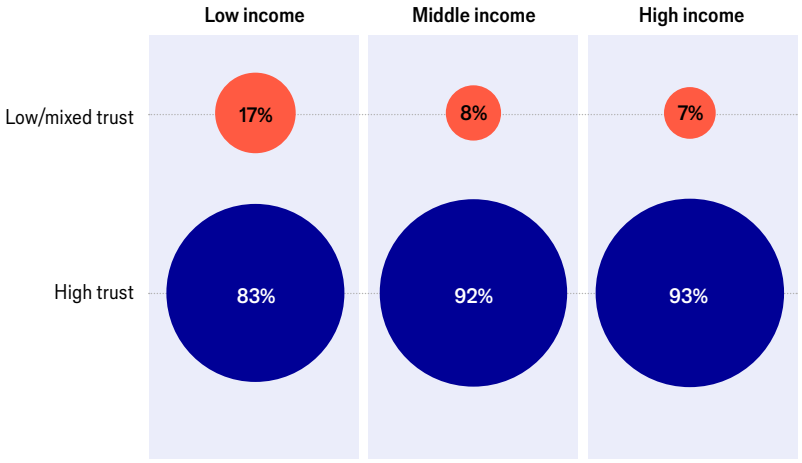
Income also influences attitudes to mobility safety. Low- and middle-income countries account for roughly 60% of the world's vehicles, but absorb over 90% of its road deaths.[18] Low-income users in our survey are nearly twice as likely to report low or mixed confidence in their daily safety (17%) as their middle- and high-income counterparts (8% and 7%, respectively). This is not surprising, as these users are more likely to depend on transport modes and environments where safety oversight is weaker: older vehicles, poorly maintained infrastructure, less protected routes and roads with less margin for error.

The vehicle gap is stark. Those with fewer financial resources tend to drive older vehicles,[19] whereas significant advances such as automatic emergency braking, lane-keeping assistance and blind-spot monitoring are concentrated in newer vehicles. The average age of a passenger vehicle[20] in the US is now 12.8 years, meaning full integration of these safety technologies into the wider fleet is likely to take decades.[21]

The infrastructure gap compounds this. Lower-income areas are more likely to see traffic crashes, injuries and deaths than more affluent ones, owing to a combination of reliance on older vehicles, as mentioned above; reliance on walking; unsafe conditions such as speeding, dense traffic and poor infrastructure; and greater incidence of illegal and antisocial driving such as not wearing seatbelts or driving under the influence.[22,23] Research finds that the hazard posed by urban main roads is threefold for lower-income environments than for more affluent communities.[24] In addition, low-income individuals face significantly higher risks of hospitalisation from pedestrian injury, nearly double that of higher-income groups.[25]

Figure 4. The income divide

Users' responses to survey question "In your day-to-day transport, how much do you trust that mobility systems keep you safe?" (by income level)



Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

The complacency threat

The 90% of respondents who feel safe are responding to real progress in mobility safety systems, but that confidence could mean they are decreasing their vigilance too much: a user who trusts an automated feature beyond its limits is less safe, not more.[26]

The two effects compound each other: users relax into a system that experts know is still incomplete, while experts face diminishing urgency to address fragilities that users cannot see. Historically, it is external pressure from users that drives safety improvements, and progress slows without that pressure, even as many industry professionals remain far from reassured about current performance.

That asymmetry is the condition in which every safety decision is currently being made, and it is at its sharpest where humans and machines are still learning to share tasks.

Hands off the wheel

Mechanical failure is not a pressing concern: only 3% of industry professionals now identify this as the leading cause of mobility safety risks. The remaining, more difficult challenge is how users interact with automated systems.

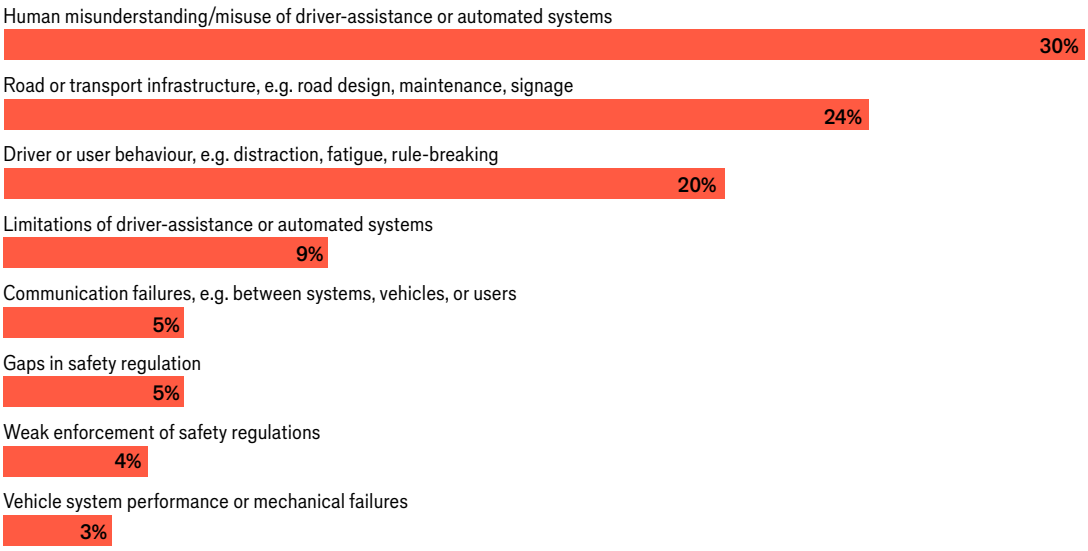
The attention handover

A chief safety concern is the moment when control passes between human and machine. As automated systems begin to feel more familiar, users are becoming less vigilant and more trusting in the technology than is evidenced.[27]

Users actively acknowledge overreliance on technology as their top safety concern, most acutely in India (49%), Germany (39%) and among rural users (52%). Moreover, users perceive their own behaviour as a leading cause of mobility safety issues.

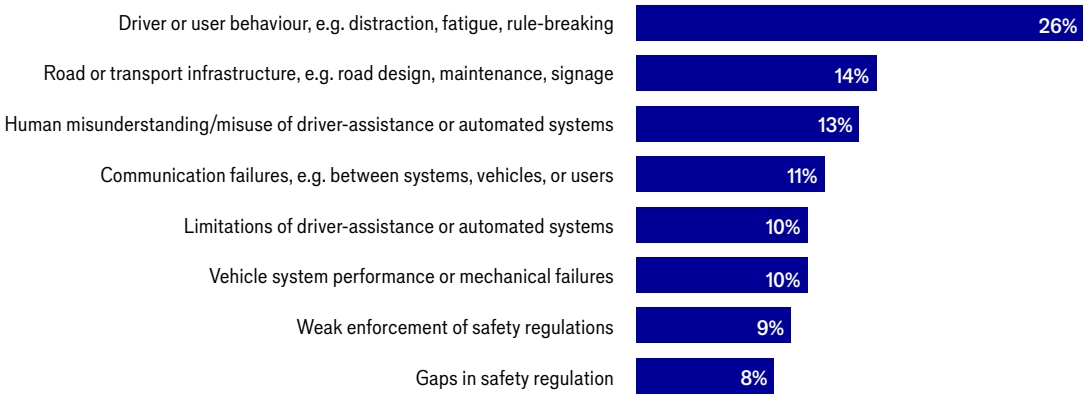
Industry professionals' leading concern mirrors the same risk: systems and features that distract people from the road or their surroundings.

Figure 5. Misunderstanding the machine
Industry professionals' responses to survey question "Which of the following is most responsible for mobility safety issues?"



Source: Economist Enterprise *Driving trust in mobility safety* industry professional survey (2026)

Figure 6. Behaviour tops concerns
Users' responses to survey question "Which of the following is most responsible for mobility safety issues?"

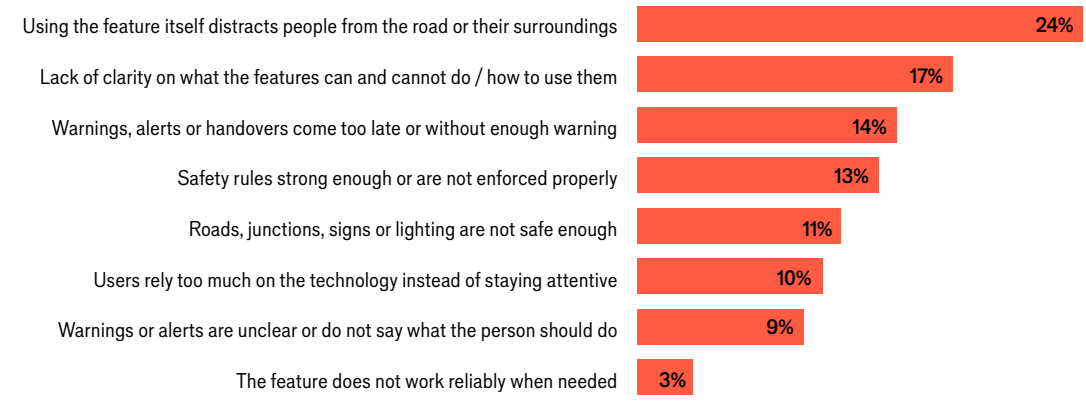


Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

In the US, the Insurance Institute for Highway Safety (IIHS) rated 11 of 14 partial automation systems 'poor' in safeguards to keep drivers genuinely engaged,[28] and found that drivers merely learn the timing of attention reminders and work around them while continuing to multitask.[29] When alerts do fire correctly, re-engaging with the road is harder than it looks: research by DEKRA, a German inspection and expert certification company, on how quickly drivers can refocus, known as cognitive re-entry, shows that even a well-timed alert cannot compensate for the time it takes a disengaged driver to rebuild situational awareness.[30] For 21% of users, knowing when a feature is active and when it needs them back is the single greatest confidence builder available.

Better interaction between the technology and the person using it, built on real engagement rather than mere compliance, is necessary to make this attention handover moment unambiguous, timely and impossible to miss. As Dan Hennessey, director of the transportation and public works department for the City of Santa Rosa, notes, "a lot of mobility challenges are about individual behaviour irrespective of trust in the machines themselves. Are we trying to encourage appropriate individual behaviour or build safety into our systems?"

Figure 7. When the feature becomes the distraction
Industry professionals' responses to survey question "Which of the following do you believe is the most serious safety risk with how users interact with vehicles, services or mobility systems in your line of work?"



Source: Economist Enterprise *Driving trust in mobility safety* industry professional survey (2026)

Case study

Keeping the driver in the loop

Teammate Advanced Drive, used by Toyota and Lexus, shows both how far driver-assistance technology has come and its remaining limits. The system can take over steering, accelerating and braking on the highway, including trickier tasks like changing lanes, merging and overtaking other vehicles. It uses a wide-ranging set of cameras and sensors to 'see' all around the car and plan several miles ahead, while its backup systems can keep the car under control for a few seconds if something goes wrong.

Yet despite this capability, Lexus designed Teammate Advanced Drive to function only under active driver supervision, a deliberate acknowledgment that even highly capable automation still depends on a human remaining alert and ready to intervene at any moment. The lesson is not that one system solves handover risk, but that driver attention, system status and clear communication should be built into the safety architecture from the start.[31]

The industry that is progressing fast to solve the engineering problem now needs to bring the same rigour to the human side.

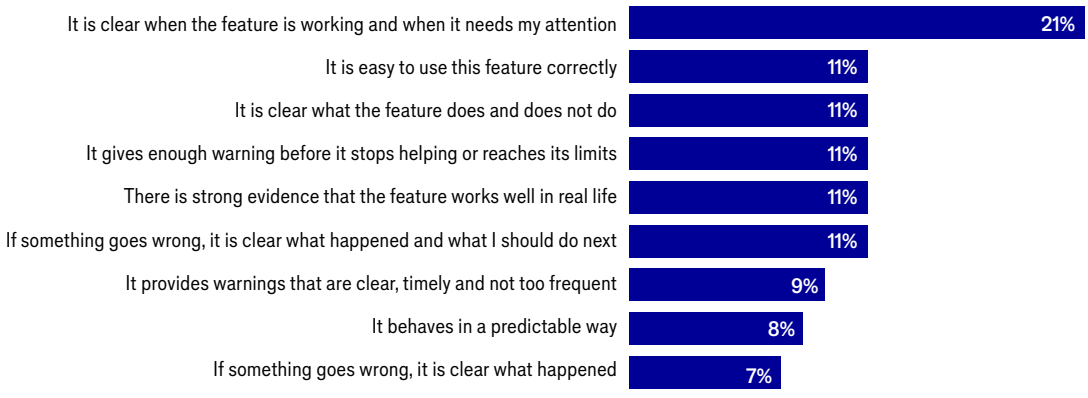
The compliance ceiling

The attention problem on roads has existed for decades, and the rules designed to address it rarely achieve full compliance. Every surveyed market restricts mobile phone use while driving, yet phone use still featured in 14% of all distraction-affected fatal crashes in 2024 in the US.[32] Even seat belts and motorcycle helmets, arguably the most successful road-safety interventions ever introduced, have not achieved universal adoption: 20% of drivers admitted to not using them in 2023, according to the World Health Organization,[33] a pattern that this study's ten markets still reflect in full in 2026.

A vehicle can pass every technical standard and still fail the moment a driver misreads a handover signal at 70mph. Manufacturers and regulators need to focus on human-machine interaction and test with real-world usage data, including engagement rates, evidence of user understanding and near misses. The industry that is progressing fast to solve the engineering problem now needs to bring the same rigour to the human side.

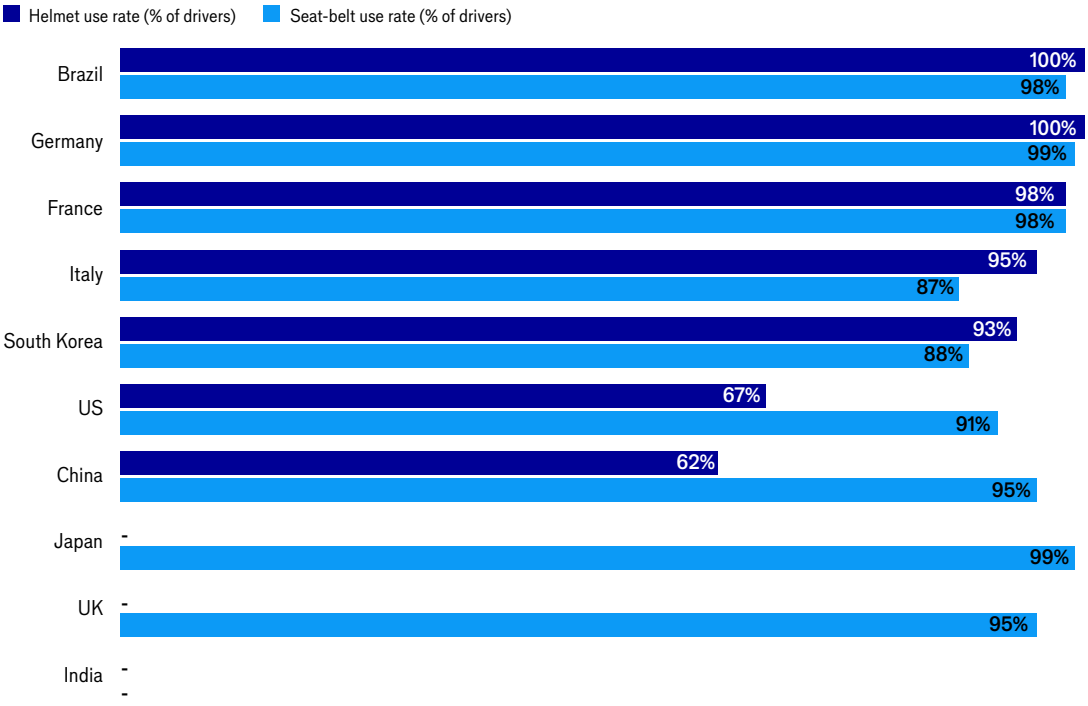
Figure 8. Confidence begins with a clear handover

Users' responses to survey question "Which of the following would give you the most confidence to use transport with safety features?"



Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

Figure 9. Compliance is still unfinished business
Seatbelt and helmet use rates across the 10 surveyed markets (% of drivers)



Source: WHO Global status report on road safety (2023)
Note: Data for helmet and seatbelt use rates are not available for India; data for helmet use rate is not available for Japan and the UK.

Box 1

China's e-bike test—A law existing is not a problem solved

In May 2020, Zhejiang became one of the first Chinese provinces to make wearing e-bike helmets mandatory with penalties for violations, a landmark in a country where e-bikes are a dominant form of urban transport and a significant test of whether enforcement alone could change deeply ingrained behaviour at scale.

An observational study tracking 99,407 e-bike users across Hangzhou found that 79% of riders wore helmets correctly, but among passengers, sitting behind them on the same vehicle and facing the same road, the figure was just 42%.[34]

The dynamic generalises across modern transport: the further a user sits from operating the vehicle, from partially automated cars to robotaxis to shared mobility, the harder it becomes to keep humans meaningfully engaged with the safety systems designed to protect them.

The communication deficit

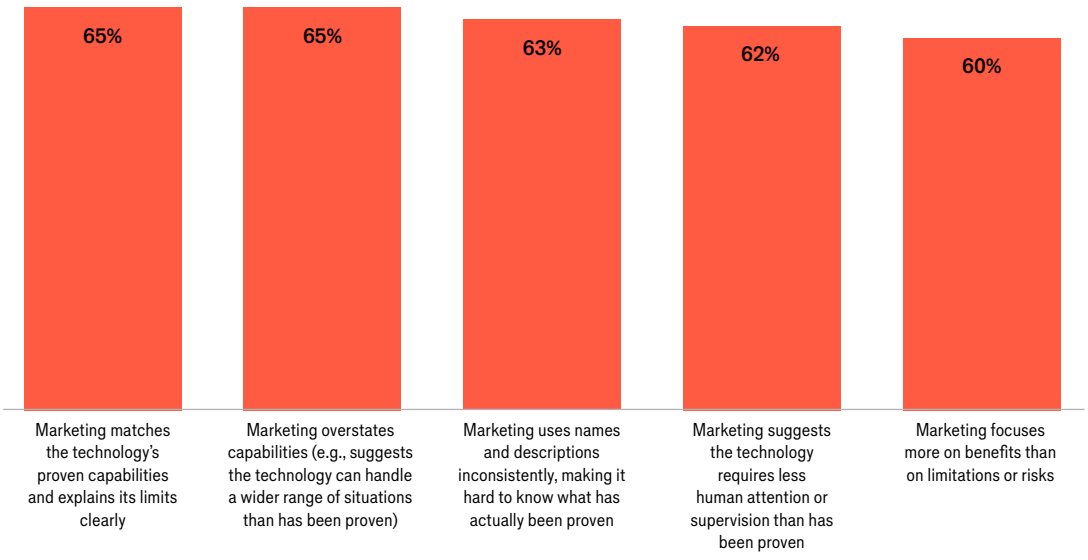
When asked about marketing related to new vehicles or transport services, 65% of professionals express concern that advertisements may overstate capabilities, 62% believe they imply reduced user attention requirements and 60% think they emphasise benefits over limitations. The view spans manufacturers, technology companies, ride-hailing operators and public-sector bodies alike, suggesting widespread concern. As innovation accelerates, ensuring that public understanding keeps pace with technological capabilities is becoming increasingly important.

The naming debt

The terms used for new mobility technologies have not helped. In 2018, over 70% of drivers across seven markets told a Euro NCAP survey they could already buy a self-driving car, despite these not being readily available on the market.[35] Since then, terms like Autopilot, ProPILOT or Pilot Assist have misled more

Figure 10. Mixed signals

Industry professionals' responses to survey question "To what extent do you agree or disagree with the following statements about marketing related to new vehicles or transport services in your country?"



Source: Economist Enterprise *Driving trust in mobility safety* industry professional survey (2026)

than one in five drivers, who expect systems that operate without supervision.[36] Alexander Moser-Haas, head of the policy and transport department at the German Road Safety Council echoes this: "The problem of confusion caused by inconsistent terminology, unclear capability descriptions and the lack of common communication standards is significant and safety-relevant." Both the US National Highway Traffic Safety Administration (NHTSA) and the European New Car Assessment Programme (Euro NCAP), however, are unambiguous: these are assisted systems, and every vehicle still requires the driver's full attention at all times,[37,38] especially as only one of 14 partial automation systems meets acceptable safeguards according to the IIHS.[39]

This has led to some disillusionment and suspicion. When high-profile crashes exposed the distance between what Autopilot implied and what it could do,[40] the share of US drivers afraid of self-driving vehicles jumped 13 percentage points in a single year, between 2022 and 2023.[41] By the time genuine technological progress arrived, public confidence had already been damaged, and current advances are still working to rebuild trust.

While 94% of users in our latest survey rate safety technologies such as driver assistance systems and monitoring tools as effective and beneficial, their confidence in systems that take on more of the driving task remains low. Between 2023 and 2025, the share of US drivers afraid of fully self-driving vehicles fell just seven percentage points, from 68% to 61%; while those willing to trust one rose from 9% to 13%.[42] Two years of advancing technology, expanding robotaxi coverage and improving safety features produced, at best, a marginal shift.

Proof over promise

Industry professionals are clear about what would build user confidence in a safety feature: performance reported openly, tested independently and measured against a standard that no manufacturer wrote for itself. But sustained evidence is not how most safety information currently reaches the public.

Figure 11. Proof beats promotion

Industry professionals' responses to survey question "When a new vehicle or transport safety feature is introduced, what gives you the most confidence that it is safe?"

Source: Economist Enterprise *Driving trust in mobility safety* industry professional survey (2026)

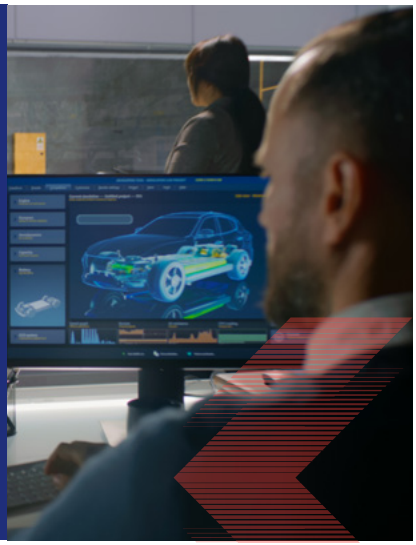
The most trusted safety ratings in the world come from authorities such as the Euro NCAP, the IIHS in the US, Latin NCAP and the National Agency for Automotive Safety and Victims' Aid in Japan, as these organisations don't sell products. But fragmented standards limit their reach. A technology can earn a clean assessment in one market on entirely different terms than in another, making cross-border confidence both difficult to build and easy to overstate.

What is needed is mandatory capability disclosure: plain-language statements of what a system can and cannot do, required by regulators before a product or service reaches consumers, produced by manufacturers and verified independently. Without that three-party structure—regulator, manufacturer and independent verifier—manufacturers will have little reason to stop making claims that exceed demonstrated capability, perpetuating safety and reputational risk.

Case study

Making automation boundaries explicit

Mercedes-Benz Drive Pilot in Germany shows how claims about automated driving can be tied to approval and operating limits. Mercedes presents it not as general autonomy, but as a Level 3 conditional-automation system for specific motorway conditions. Germany's Federal Motor Transport Authority approved it under UN-R157,[43] linking the claim to defined technical tests and regulatory oversight. Trust depends not only on what a system can do, but also on how clearly its limits are set before users can access it.[44]



Closing the governance gap

Almost 70% of the engineers, policymakers, manufacturers and operators who run the mobility safety ecosystem identify a major risk factor in the fragmented relationship between regulators and the industry they oversee. That lack of coordination leaves users confused, piecing together their understanding of safety features from a patchwork of peer reviews, government approvals, real-world track records and technical explanations without a single source of truth to command clear authority.

Figure 12. Approval matters, but so does experience
Users' responses to survey question "When a new vehicle or transport safety feature is introduced, what gives you the most confidence that it is safe?"

Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

No fixed address

Across all ten markets, accountability frameworks are more coherent on paper than in practice. Each market has a national road-safety strategy and a designated lead agency, yet the states, cities and local authorities where most safety decisions are actually made operate at a significant remove from those frameworks.[45,46,47] In the UK, for example, the Automated Passenger Services permitting scheme for self-driving passenger services on public roads involves national regulators, local licensing authorities, vehicle certifiers, incident inspectors and traffic authorities,[48] each with a partial role, and none with uncontested ownership of the outcome.

The result is that responsibility is poorly located even in users' minds. US and UK survey respondents look primarily to national regulators; Chinese and German users are more likely to name individuals, even though in the latter any automated system needs strict regulatory sign-off before reaching the road.[49] This emphasis on national institutions can obscure where many safety interventions are actually delivered. As Mr Moser-Haas highlights, "many decisions affecting pedestrian and cyclist safety - beyond road-user rules - are made by federal states, districts and municipalities. Focusing only at the national level therefore leaves an accountability blind spot."

Figure 13. Who should keep mobility safe?
Users' responses to survey question "In your country, which of the following do you think should have the most responsibility for mobility safety?" (by country)

Country		Organisation that users believe should have the most responsibility for mobility safety
Brazil	Japan	National transport ministry or national safety regulator
France	South Korea	
India	UK	
Italy	US	
China	Germany	Individual road users

Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

Among industry professionals, the picture is even more confused, with vehicle manufacturers and technology providers not seeing themselves as responsible for road safety outcomes. They estimate that they account for just 3% of the day-to-day influence on this, compared with 37% for road and infrastructure authorities. This disparity should be sounding an alarm bell.

Case study

Sweden's Vision Zero—Safety by design

In 1997 Sweden's parliament adopted Vision Zero, a road-safety policy with a stark aim: no one should die or suffer serious injury in traffic. It treated deaths not as the price of mobility, but as proof that the system had failed.

The model gives responsibility to both road users and system designers. Some examples of how Sweden has implemented this include central barriers to prevent head-on collisions, speed cameras, roundabouts in place of traditional junctions, investing in safer vehicles and adapting urban street design for people walking and cycling. The principle is simple: people make mistakes, but transport systems should be designed so those mistakes do not become fatal.[51] The results are clear. Road deaths in Sweden have more than halved since Vision Zero began. It has also achieved lower speeds, better vehicles and enabled a close study of crashes. The lesson for automated transport is simple: safety cannot rest on better machines or better behaviour alone. It must be built into the system that links users, infrastructure, industry and regulators.[52,53]

Connected governance

Effective safety governance combines setting preventative standards before a system reaches the road with mandatory, transparent reporting afterwards. Sweden's Vision Zero is one of the clearest examples of this model in practice.[50]

None of the ten markets studied here fully achieves the Swedish standard, but pockets of strength exist at different stages: on the pre-deployment side, the German Federal Motor Transport Authority's (KBA) approval requirement[54] and the UK's Automated Vehicles Act 2024[55] set conditions before systems reach the road; on the post-deployment side, France's ONISR (*Observatoire national interministériel de la sécurité routière*)[56] and Spain's Directorate-General for Traffic[57] publish annual road safety data with sufficient granularity to track interventions against specific outcomes.

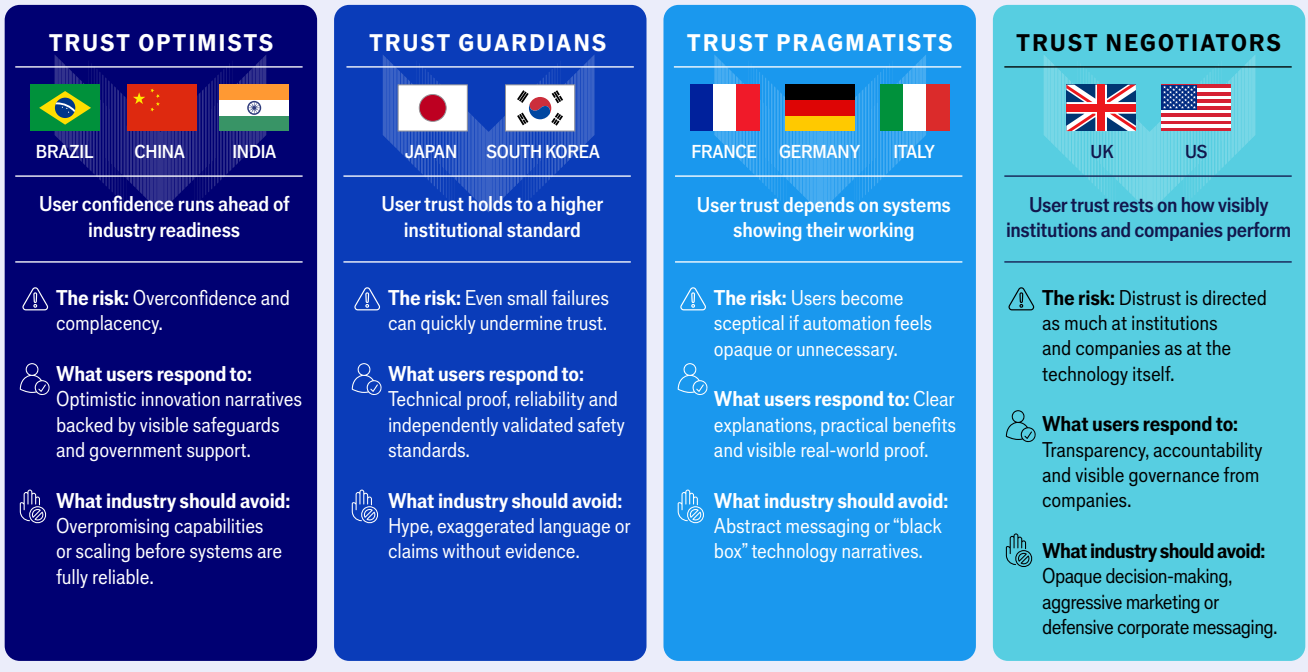
Yet data and standards alone are not sufficient to build public trust unless they lead to visible corrective action. When the US NHTSA issued a consent order making crash-reporting failures punishable,[58] its later review of Tesla's Autopilot raised the same concerns the recall was meant to resolve; the accountability loop was opened and investigated, but never closed. By contrast, two examples highlight what happens when cause is visibly linked to effect. Since 2016, India's SaveLIFE Foundation recorded a 58.3% fall in fatalities on the Mumbai-Pune Expressway after implementing targeted measures.[59] At a wider scale, the International Road Assessment Programme (iRAP) methodology has been credited with preventing roughly 700,000 deaths and serious injuries across 74 countries between 2016 and the end of 2024.[60]

Four archetypes, four opportunities

Even when the governance frameworks are similar, the way the public reacts to them can differ dramatically across markets.

Four archetypes of mobility trust emerge across the ten markets surveyed, each carrying its own logic for how confidence is built and where it breaks: *trust optimists* trust ahead of institutional readiness, and have to ensure confidence does not run ahead of what technology can deliver; *trust guardians* trust the systems around products, and need strong safety frameworks in place well before a failure occurs; *trust pragmatists* trust when evidence is provided, and require trust to be earned; and *trust negotiators* trust institutions that visibly deliver, and need proof that institutional oversight is working. Each cluster of markets responds to different signals, runs a different risk when trust breaks and demands a different response from industry.

Figure 14. One size does not fit all
Four archetypes of how trust in mobility safety can be built



Each cluster of markets responds to different signals, runs a different risk when trust breaks and demands a different response from industry.

Archetypes may shift over time as systems mature and incidents occur. Understanding which one is current is a precondition for designing effective interventions, but to make those interventions durable, it is also crucial to anticipate the specific risks each archetype is most likely to produce over time.

TRUST OPTIMISTS

Confidence ahead of capability

Trust optimists are those countries where public confidence has run ahead of what the system can deliver. The three surveyed countries in this archetype—Brazil, China and India—carry the widest gap between perceived and proven safety in the study: 94% of users say mobility systems keep them safe, against 18% of professionals. These three markets also record the highest fatality rates of any group, averaging 16.2 per 100,000 people against a study average of 8.7.[61]

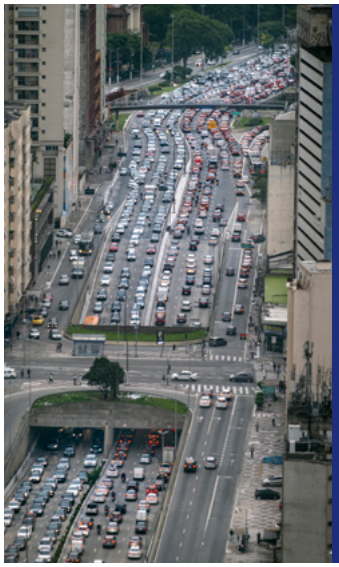
Overconfidence is a potential failure mode: users may relax into systems before those systems are fully reliable, driven by general optimism about governance and technology, engaging without the attention required.

In an optimist market, public trust becomes risk when it runs ahead of evidence; when evidence catches up, that same trust becomes the foundation for durable progress. Industry and policymakers need to channel optimism into informed engagement, backing safety messaging with visible safeguards rather than just reassurance.

TRUST GUARDIANS

High confidence held to a high bar

Confidence in guardian markets, notably Japan and South Korea in our study, is rare in that it travels in both directions: 84% of users and 70% of professionals say mobility systems keep them safe on a day-to-day basis, the closest alignment of any archetype in the study.



Case study

Brazil's Fortaleza—Optimism, made visible

Fortaleza, the capital of Ceará state in northeastern Brazil and home to around 2.4 million people,[62] launched a sustained road-safety programme in 2012, built initially around historical crash analysis, speed-management decisions, and coordinated work among the city's transport, police and health authorities.

In 2021, the city added VIDA (*Vida no Trânsito*, "Life in Traffic"), a public platform that consolidates traffic-incident data from the same authorities into a single public dashboard;[63] a municipal road-safety committee meets every 15 days to review the data and decide what to act on.

Between 2012 and 2022, the city has recorded a 57% reduction in traffic fatalities, 1,086 lives saved and eight consecutive years of lower fatalities, with the pledge to keep improving on this trajectory.[64]

The institutional layer is doing visible work: 87% of users in these markets agree that safety rules are keeping pace with new transport technologies. Fatality rates average 4.8 deaths per 100,000 people against a study average of 8.7, with Japan at 2.7 and South Korea at 6.9.[65] The Korean figure reflects a higher pedestrian death toll, historically weaker traffic-law enforcement and elevated rates of drunk-driving.[66]

Confidence in these markets is built on independent validation and a track record of reliability, not manufacturer evidence or regulatory approval. This trust persists even when products fail: nearly half of Japanese users report safety features failing to prevent or reduce harm, and a quarter of South Korean users report the same. The risk is that when trust rests on institutions rather than product performance, failures can emerge slowly and go unnoticed, allowing performance to erode until problems become impossible to ignore.

TRUST PRAGMATISTS

Confidence conditional on evidence

For trust pragmatists, high confidence and active scepticism coexist. Across France, Germany and Italy, 90% of users say mobility systems keep them safe compared with 51% of professionals.

The gap is not a response to visible failure: fatality rates in these markets are the lowest in the study, at 4.3 deaths per 100,000 people.[67]

What runs through pragmatist markets instead is anxiety about safety technologies that feel opaque, overstated or poorly executed. Users need clear explanations, real-world proof, demos and visible practical benefits. Data management and privacy are also especially relevant governance levers here, and three different versions of the same demand appear across the archetype: Germany approaches data through purpose limitation; Italy is uncomfortable with information sharing, even for public research; and France reacts more sharply than other markets to overclaiming.

TRUST NEGOTIATORS

Institutional trust, one scandal from collapse

The UK and the US are trust negotiators: user trust is above average, at 92%, and heavily tied to institutions, while industry professional trust stands at 52%. Users in both markets name national regulators first when asked who bears responsibility for safety. They rate government approval as the leading driver of confidence in a new safety feature and report similar levels of suspicion towards corporate handling of personal data. In this market, a regulatory failure or corporate cover-up is particularly costly.

While the trust mechanism is shared, the realities of road safety diverge sharply between the two countries: in 2021, the UK recorded 2.4 road deaths per 100,000 people; meanwhile, the US recorded 14.2, closer to the average of the highest-fatality archetype (16.2) than to its archetype partner across the Atlantic,[68] with road crashes imposing a cost equivalent to 3.3% of US GDP against 0.56% in the UK.[69] This creates a sharper gap between trust and performance in the US: confidence remains fairly high, but rests on a safety system with poorer outcomes and higher costs. In markets where trust must be earned, institutions need to show why confidence is deserved, through performance reports, accountability and clear action when systems fall short.

From trust to action

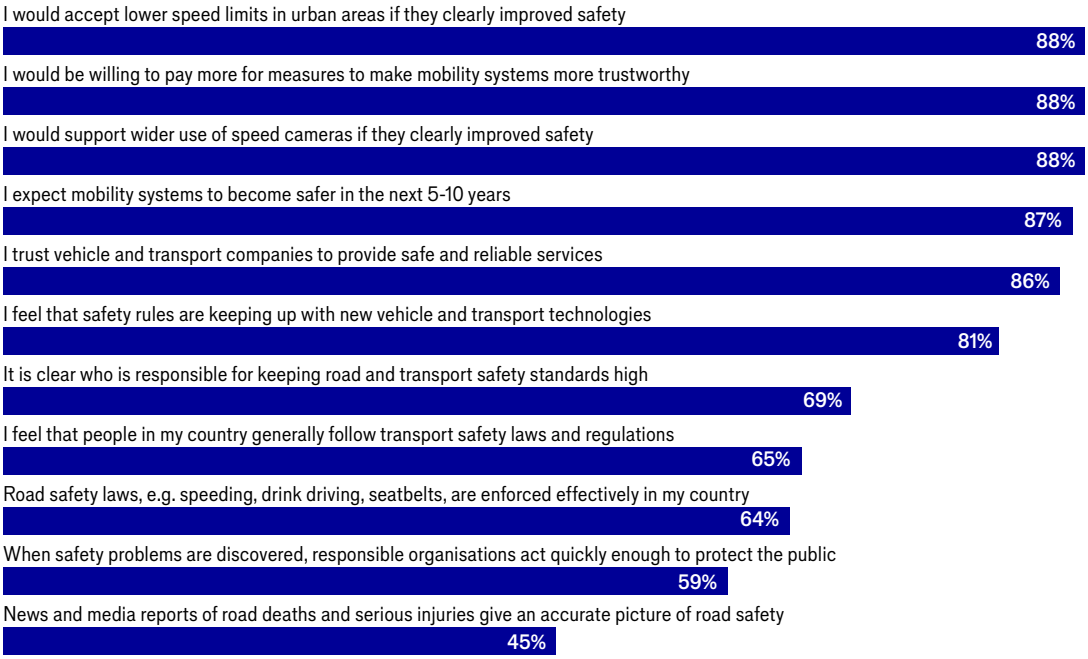
The conditions for safer mobility already exist: public appetite for safety is high, industry professionals are willing to name the gaps in their own systems, regulators have authority they are not fully exercising and the technical capability to reduce harm is largely in the market. What needs to happen now is for institutional infrastructure to turn those conditions into outcomes.

Active willingness

Public willingness to support safety measures sits consistently at around 88%, while agreement that the current system is performing on accountability, responsiveness, enforcement and reporting sits 20-40 percentage points lower. That gives institutions a mandate to act.

Figure 15. People are ready for safer mobility

Users' responses to survey question "To what extent do you agree or disagree with the following statements about road and transport safety in your country?"



Source: Economist Enterprise *Driving trust in mobility safety* user survey (2026)

The willingness measured here covers the levers most visible in public life, including speed limits, cameras and the price of safer mobility. Road and infrastructure design, with measures such as safety barriers and roundabouts delivering up to 70-80% reductions in fatalities and severe injuries,[70] offers a complementary institutional instrument that is less visible to the public but has the greatest measurable impact.

An open road

If institutions hesitate to use this mandate, public expectations and habits will continue to form around systems whose safety performance is not yet well established. Over time, this can lead to levels of trust in new mobility safety technologies that outpace the underlying evidence. For example, research from the IIHS and Highway Loss Data Institute finds little evidence that current driver-assistance features prevent crashes at the rate their marketing implies.[71]

Now is the time for regulators to drive consistent, measurable improvements in mobility safety. While the implementation is local, the principles to follow are universal: capability should be disclosed in terms users can act on; marketing should meet the same evidentiary standard as the engineering it describes; and accountability must bring together both pre-deployment standards and post-deployment reporting.

Alongside transparency in reporting, manufacturers must address transparency in marketing.

The four trust archetypes introduced earlier in this report—optimists, guardians, pragmatists, negotiators— offer a diagnosis of what is most likely to trigger a crisis of public trust in different markets, and which lever is best at preventing it. Used well, the framework aligns perceived and proven safety by institutional design rather than by the failure that would otherwise force it.

A roadmap for rebuilding trust

Closing the gap between how safe mobility systems are and how safe people feel about them is not a task for any single actor. The stakeholder playbook to drive mobility safety sets out three priority actions for each group, beginning with the steps that apply universally before turning to targeted interventions.

Key priorities:

1. **Transparency is the foundation.** The most immediate actions across all three groups—performance reporting, consistent terminology, marketing alignment—are all forms of disclosure. The precondition for rebuilding trust is that users, regulators and the public can see what systems actually do, how they actually perform, their limits and what they actually require of the people using them.
2. **Coordination gaps are the biggest structural risk.** The problems identified in this report, from fragmented standards and inconsistent regulation to marketing that sometimes outruns evidence, are not failures of individual actors. They are failures of the system those actors operate in. The medium-term priorities all require multiple organisations, jurisdictions or sectors to move together, and that will not happen without deliberate cross-border and cross-sector architecture.
3. **Human behaviour must be treated as a design variable, not a compliance problem.** The deepest structural reforms are making human-machine interaction a core of safety certification, redesigning the attention handover and building data stewardship frameworks. These share a common premise: the gap between how safe systems are and how safely people use them cannot be closed by engineering alone. Closing it requires designing for how people actually behave.

Table 1: Playbook for mobility safety

Stakeholder	Priority action	Summary	Example	Time to impact*
Private sector	PRIORITY 1 Commit to regular, public safety performance reporting	Publish crash rates, incident data and methodology on defined timelines as a standing accountability commitment, instead of a crisis response. Reports should be comparable across competitors and accessible to non-specialist audiences.	Waymo's Safety Impact Hub publishes crash-rate comparisons against human-driver benchmarks with downloadable data, updated in line with regulatory reporting timelines.	Short term - quick win
	PRIORITY 2 Align marketing claims to demonstrated, independently verified capability	Marketing must be explicit about where a feature works, under what conditions and what the driver is still required to do. Feature names that imply autonomy beyond the approved operating envelope should be retired.	Cadillac's Super Cruise marketing sets out operating conditions and driver responsibilities explicitly.	Short term - quick win
	PRIORITY 3 Redesign the human-machine attention handover	Treat the moment of control transfer from system to driver as a primary safety architecture challenge. Alert systems must achieve genuine driver re-engagement, and not minimal compliance with attention reminders that drivers learn to work around.	IIHS safeguard ratings and DEKRA research on cognitive re-entry together document where current systems fall short and what redesign must address.	Medium term - coordinated lift
Regulators and public institutions	PRIORITY 1 Shift from post-deployment scrutiny to preventive regulation	Mandate independent safety assessment before or during limited rollout, not after incidents trigger review. Build pre-deployment testing infrastructure so vehicles are approved before sharing roads with the public.	The UK's Automated Vehicles Act programme and Singapore's CETRAN facility both assess vehicles in controlled conditions before public deployment.	Short term - quick win
	PRIORITY 2 Establish enforceable standards for capability disclosure and marketing claims	Set clear, jurisdiction-consistent rules for what manufacturers can claim about system capability and what attention requirements they must communicate to users and enforce them.	California Department of Motor Vehicles' (DMV)'s ruling against Tesla for misleading use of "Autopilot" and "Full Self-Driving Capability" establishes the principle; the task is to make equivalent standards universal.	Medium term - coordinated lift
	PRIORITY 3 Make human-machine interaction a core dimension of safety certification	Extend and standardise existing assessment programmes so that real-world user behaviour, including engagement rates, handover compliance and evidence of understanding, carries the same weight in safety certification as technical performance metrics.	Euro NCAP and IIHS already assess driver engagement alongside technical performance; the task is to extend and align these programmes internationally.	Long term - structural reform
Industry bodies and multilateral organisations	PRIORITY 1 Impose consistent terminology across driver assistance systems	Inconsistent feature naming across manufacturers and markets is actively eroding trust. Industry bodies are uniquely positioned to enforce terminological order where neither individual companies nor national regulators can move alone.	SAE International's J3016 standard creates a common framework for six levels of driving automation; the cross-industry "Clearing the Confusion" initiative extends this towards standardised consumer-facing terms.	Short term - quick win
	PRIORITY 2 Build cross-border infrastructure for comparable safety performance data	Committing manufacturers to public safety disclosures is only meaningful if data can be aggregated and scrutinised across markets. Industry bodies are best placed to create the shared infrastructure that makes transparency practical rather than nominal.	Europe's Data for Road Safety ecosystem, which brings together manufacturers, service providers and public authorities to exchange safety-related traffic data, offers a model for cross-border reporting infrastructure.	Medium term - coordinated lift
	PRIORITY 3 Establish international data stewardship standards for connected vehicles	Set clear frameworks governing how mobility data is collected, stored, breached and controlled by users across borders, not just within jurisdictions. The absence of international standards is itself a source of distrust.	The European Data Protection Board's guidance on connected vehicles establishes principles around purpose limitation, privacy by design and user control. The task is to build from this towards genuinely international frameworks.	Long term - structural reform

*Time to impact is an indicative estimate of which action is likely to have an impact in the short term (quick wins), medium term (a coordinated lift that requires industry-regulator alignment, shared standards, or data/reporting infrastructure before impact can be felt) and long term (a structural reform that requires legislation, institutional capacity-building, or market-wide governance change before impact can be felt).

The private sector: manufacturers, technology providers and operators

The most consequential shift the private sector can make is a cultural one: treating safety communication as an ongoing responsibility rather than a crisis-response tool. Across every market and trust archetype, professionals identified one intervention above all others as confidence-building: regular, public safety performance reporting as standard practice. Waymo's Safety Impact Hub offers a working model: it publishes crash-rate comparisons against human-driver benchmarks, complete with methodology and downloadable data, updated in line with regulatory reporting timelines.[72] Similar approaches can be seen in initiatives such as iRAP[73] and India's SaveLIFE Foundation, which show what attributed, cause-linked reporting looks like in practice.

Manufacturers must also address transparency in marketing. Overclaiming system capabilities is both a reputational and a safety risk, one that users and professionals have independently identified as a significant source of distrust. Cadillac's Super Cruise, for example, is explicit about where the feature works, under what conditions and what the driver is still required to do.[74] That standard should be the floor, not the exception.

The third universal priority is the attention handover. As systems take on more driving functions, the moment at which a vehicle hands control back to a human is the highest-risk point in the journey and currently one of the least well-managed. Human-machine interface design must make that handover explicit, timely and impossible to miss. Alert systems, as currently designed, tend to teach minimal compliance rather than genuine engagement.[75]

Beyond these universal actions, the right private-sector interventions vary by market. In trust optimist markets, optimistic adoption needs to be matched with visible safeguards and practical safety education deployed alongside product launches. Nissan's Safety Driving Forum in India, running since 2012, illustrates the approach: simulated crash and rollover demonstrations that translate user confidence into safer behaviour, rather than relying on reassurance alone.[76]

In trust guardian markets where trust is earned through proof rather than promise—Japan and South Korea especially—the priority is continually investing in long real-world performance records before making significant claims. Honda's Level 3 approval from Japan's Ministry of Land, Infrastructure, Transport and Tourism for the Legend with Traffic Jam Pilot is a model: claims tied to clearly defined and independently tested operating conditions backed by formal, regulatory sign-off, not marketing ambition.[77]

In trust pragmatist markets, where users are cautious and sceptical of abstract safety narratives, manufacturers should lead with the explanation over benefits. Euro NCAP's assisted driving grades[78] and Mercedes-Benz's KBA-approved DRIVE PILOT rollout,[79,80] show how validated, bounded claims build more durable confidence than broad autonomy narratives.

The most urgent structural problem identified by professionals across all markets is the gap between regulators and industry.

Finally, in trust negotiator markets, where users are watching how organisations behave when things go wrong, transparency and accountability frameworks are trust signals in their own right. Breach communication, incident response and regulatory cooperation matter as much as product features. Cruise[81] offers a cautionary case. The American self-driving car company faced regulatory scrutiny and penalties owing to multiple crashes involving automated driving systems and failing to disclose key details. The episode demonstrated how transparency failures can erode trust.[82] Moreover, Uber's published US safety reports are the constructive counterpart, covering serious safety incidents on its rideshare platform, including traffic fatalities, fatal physical assaults and sexual assaults.[83]

Regulators and government

The most urgent structural problem identified by professionals across all markets is the gap between regulators and industry. Sixty-eight percent of professionals identify this coordination failure as the primary breakdown point in the current governance of mobility safety. Closing it must be treated as a priority, not an aspiration. That means moving from post-deployment scrutiny to preventive regulation: mandating independent assessment before or during limited rollout rather than waiting for incidents to trigger review. The UK's Automated Vehicles Act implementation programme shows what proactive regulatory architecture looks like by bringing together the Centre for Connected and Autonomous Vehicles, the Department for Transport and other public bodies to approve vehicles before use, monitor their safety once deployed, investigate incidents and protect consumers.[84] Singapore's Centre of Excellence for Testing & Research of Autonomous Vehicles NTU has a pre-deployment testing facility, which recreates everyday local driving conditions, such as Singapore-style junctions, traffic lights, road signs and lane layouts, so vehicles can be checked in a controlled setting before they share roads with the public.[85]

Regulators also have a direct role in the marketing problem. Establishing clear, enforceable standards for what manufacturers can and cannot claim about system capabilities—and what human-attention requirements they must communicate—would address one of the most consistent sources of user confusion. California DMV's ruling against Tesla for the misleading use of "Autopilot" and "Full Self-Driving Capability" establishes the principle; the task is to make equivalent standards consistent and universal rather than jurisdiction-specific.[86]

The archetype-specific regulatory priorities follow a similar logic to those of the private sector. In trust optimist markets, the government has a role in providing visible institutional backing for safety innovation, but that backing must be paired with early, enforceable reliability standards. Bharat NCAP, publishing simple star ratings for vehicles in India, shows how public confidence and accountability can be built together.[87]

In trust guardian markets, the priority is to continue investing in and funding independent safety validation infrastructure. These countries are already working on this, but the focus should be on gaining further momentum. Japan's NCAP publishes assessments of active safety, passive safety, emergency call equipment and child-restraint performance.[88] Meanwhile, South Korea's version publishes vehicle safety evaluations including crash tests, pedestrian protection, child safety and safety devices.[89]

In trust pragmatist markets, regulators should mandate plain-language capability disclosure: EU Regulation 2022/1426 on Automated Driving Systems creates the evidentiary foundation for such disclosure by requiring manufacturers to define and prove the conditions under which systems operate.[90]

Industry bodies occupy a distinctive position in the trust ecosystem: they can act where neither individual companies nor national regulators can move alone.

In trust negotiator markets, the standard is higher still. Regulators must make their own conduct visible, publishing enforcement actions, safety investigations and regulatory decisions in ways that demonstrate the quality of institutional oversight, not merely its existence. In 2022, the US NHTSA investigated crashes involving Tesla Autopilot, looking at drivers' understanding of the system along with how vehicles responded. A safety recall was subsequently issued because, in some situations, the system's safeguards had not done enough to make sure drivers stayed alert and ready to take control.[91]

Industry bodies and multilateral organisations

Industry bodies occupy a distinctive position in the trust ecosystem: they can act where neither individual companies nor national regulators can move alone. Four universal priorities follow from this.

The first is data stewardship. As mobility systems collect ever-greater volumes of personal data, the absence of clear international standards for how data are handled—covering how breaches are communicated, collection is limited to purpose and users retain control—is itself a source of distrust. The European Data Protection Board's guidance on connected vehicles provides a foundation, highlighting excessive data collection, location-data sensitivity, privacy by design, transparency and user control.[92] The task is to build from it towards genuinely international frameworks.

The second is infrastructure for ongoing performance reporting. Committing manufacturers to regular public safety disclosures is only meaningful if comparable data can be shared, aggregated and scrutinised across borders. Europe's Data for Road Safety ecosystem, which brings together manufacturers, service providers, suppliers and public authorities to exchange safety-related traffic data, offers a model for the kind of cross-border infrastructure that makes transparency practical rather than nominal.[93]

The third is making human-machine interaction a core dimension of safety certification rather than an add-on. The evidence of user confusion, complacency, minimal compliance and handover failure is extensive and well-documented. Euro NCAP's assisted driving assessments evaluate these systems not only on how well they steer, accelerate and brake, but also on whether they keep the driver appropriately engaged and provide a reliable safety backup if the driver fails to respond.[94] In the US, the IIHS assesses partial-automation systems on safeguards such as driver monitoring, attention reminders, emergency escalation and whether the system discourages misuse.[95] The task now is to extend and standardise these programmes so that real-world user behaviour is as central to safety certification as technical performance.

Finally, industry bodies must not allow the focus on digital and automated systems to displace attention from the physical safety equipment that remains the last line of defence for millions of road users. Minimum quality standards for helmets, restraints and protective gear are unglamorous but consequential, and enforcement is often inconsistent across markets. The UK's Safety Helmet Assessment and Rating Programme offers a useful model: from January 2024, manufacturers must meet UN ECE Regulation No. 22.06 for new

helmet designs, a standard that raises the baseline of acceptable protection by better reflecting the reality of real-world crashes.[96] Extending that logic internationally is a role industry bodies are well placed to lead.

In our capacity-constrained trust optimist markets, the priority is practical support for building the infrastructure and governance capability needed to translate safety ambitions into outcomes. This is the kind of long-run, multi-intervention support that Bloomberg Philanthropies' Initiative for Global Road Safety has demonstrated across Brazil, India and other high-risk markets. This programme supports a package of practical measures, from stronger road-safety laws and safer road design to public behaviour-change campaigns and capacity-building for local officials.[97]

In trust guardian markets where independent validation is a primary trust signal, the priority is mutual recognition frameworks for safety standards, so that rigorous certification in one market carries weight in another, a logic already embedded in the UNECE 1958 Agreement.[98] In practice, if a vehicle, component or system is approved in one participating market under a relevant UN regulation, other participating markets can recognise that approval rather than requiring a separate approval process from the beginning.

In trust pragmatist markets where inconsistent terminology is actively eroding trust, industry bodies are uniquely positioned to impose order. US-based aerospace company SAE International's J3016 standard creates a common framework for describing six levels of driving automation, from no automation to full automation.[99] Meanwhile, the cross-industry Clearing the Confusion initiative is working towards standard terms around driver-assist features.[100,101]

And in trust negotiator markets where accountability is the central preoccupation, industry bodies should develop transparency benchmarking: common standards against which corporate conduct on safety communication can be independently assessed, complementing the kind of performance metrics already being developed by the Automated Vehicle Safety Consortium, which help assess the safety performance of Automated Driving Systems (ADS). These metrics are designed to help developers assess how an automated system performs across real-time driving functions such as steering, braking, acceleration and monitoring the road environment.[102] Similarly, the Euro NCAP's public assisted driving grades assess both the assistance competence of ADS, how well the system supports the driver without encouraging misuse or over-reliance, and how the vehicle responds when something goes wrong.[103]

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