

arbe

**Eyes-Off Autonomy: The Conditions That
Drive Adoption and Revenue**

Survey Report, 2026

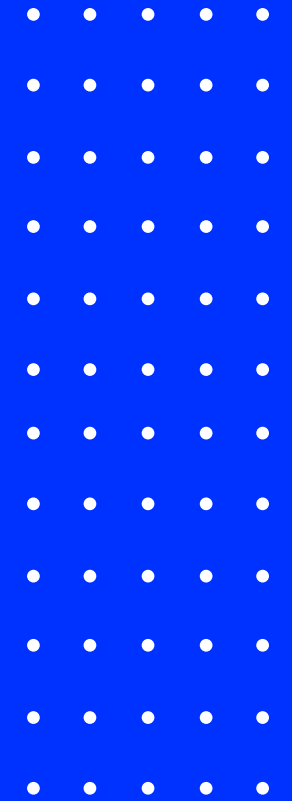


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Introduction and Key Findings



Introduction & Methodology

For many years, the automotive industry has aimed to move from hands-on driver assistance toward true eyes-off autonomous driving. This transition represents a fundamental change. When an eyes-off system is active, responsibility shifts from the driver to the vehicle. While the system may pause or alert the driver under certain conditions, the driver is no longer expected to continuously monitor the road or respond to hazards. This transfer of responsibility reshapes safety expectations, liability models, and the value proposition for consumers and automakers alike.

Despite steady progress in software and vehicle control, advancement toward eyes-off driving has been constrained primarily by sensing capabilities. Existing sensors have struggled to consistently support autonomous driving at full highway speeds while also delivering long-range detection and high resolution. Performance gaps in real-world conditions such as rain, darkness, and glare have further limited reliability. As a result, eyes-off driving has been restricted to narrow operating domains, creating an experience defined by on-and-off autonomy and frequent driver intervention.

Until recently, this reality was reflected in consumer sentiment. Prior research showed hesitation around eyes-off driving, driven by concerns about safety, smoothness, and reliability. Yet the market context is shifting. Autonomous vehicles are becoming more visible on public roads, regulatory attention to safety is increasing, and sensing technologies capable of enabling Level 3 autonomy are maturing.

Against this backdrop, Arbe conducted this survey to understand how driver attitudes are evolving. The findings reveal a meaningful shift. When eyes-off driving delivers safety, smooth and uninterrupted operation, full highway speeds, and availability in all conditions, interest rises sharply. These attributes do more than influence willingness to pay for the eyes-off functionality – they also affect when consumers choose to buy their next vehicle and which brand they choose. Eyes-off driving moves autonomy from a slow evolution of features to a potential revolution that delivers clear value and can reshape the automotive market.

Methodology

Arbe surveyed 1,000 drivers from across the United States, Europe, and Asia to understand consumer perceptions of eyes-off autonomous driving. Participants ranged in age from 18 to 65 and included both male and female drivers. All respondents were screened to ensure they actively drive a car on a daily or weekly basis.

The survey focused broadly on passenger vehicle drivers, without restricting participation to owners of specific vehicle brands or advanced driver assistance systems.

Data collection took place between December 2025 and January 2026. The survey was conducted in collaboration with Global Surveyz, an independent survey company.

Key Findings

01 | Interest in eyes-off driving rises sharply when key conditions are met.

Contrary to earlier research showing hesitation around eyes-off autonomy, this survey reveals a clear shift in driver sentiment. 77% of respondents say they are definitely or probably interested in eyes-off driving in their next vehicle purchase, if it delivers safety, smooth operation, and all-condition availability. Interest is consistently high across regions, with China leading at a combined 94%, indicating growing readiness for eyes-off capability when trust requirements are satisfied.

02 | Eyes-off autonomy can accelerate vehicle purchases and drive brand switching.

When eyes-off driving is safe, available in all conditions, and supports full highway speeds, it influences core purchasing behavior. 69% of respondents say they would be likely to buy a new vehicle earlier than planned to access such a system. In parallel, 73% say they would be likely to switch brands if their current manufacturer fails to offer reliable eyes-off autonomy. This reveals that eyes-off driving is a competitive differentiator capable of reshaping sales timing and brand loyalty.

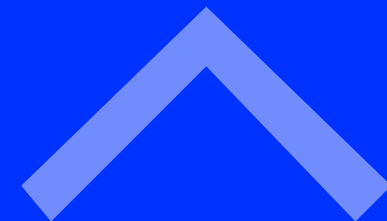
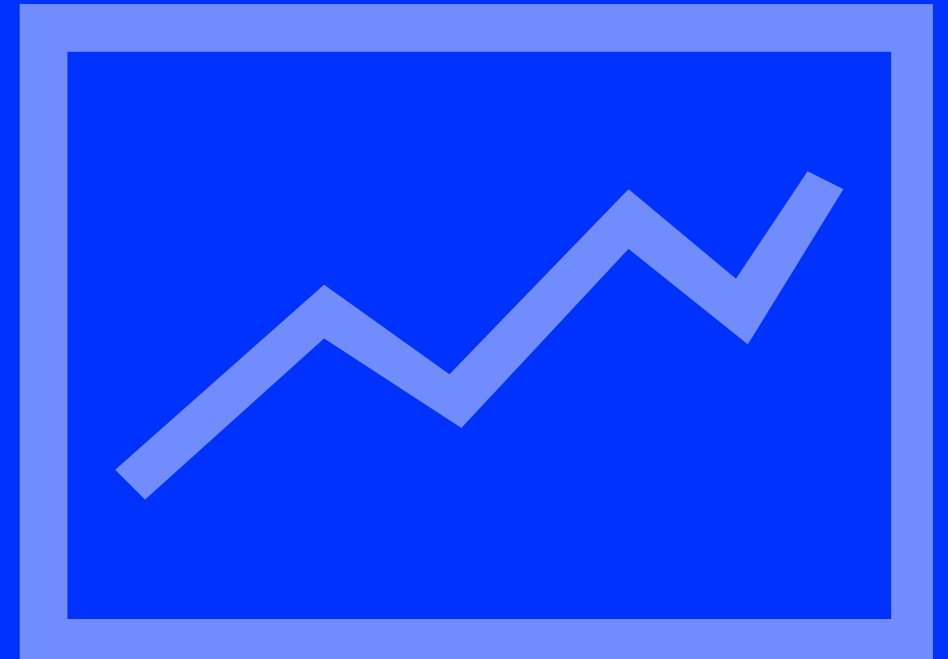
03 | All-condition performance is a prerequisite for monetizing eyes-off driving.

Drivers view reliable operation in darkness and challenging weather as non-negotiable. 43% say they will only pay for eyes-off driving if it works in any weather and any lighting condition. At the same time, all-condition reliability unlocks additional value, with 26% willing to pay a minor additional fee and 18% willing to pay a meaningful additional amount for it. Without this capability, automakers risk losing the full eyes-off subscription opportunity.

04 | Full highway-speed operation is both a gating factor and a revenue driver.

Eyes-off driving that cannot operate at full highway speeds fails to meet driver expectations. 38% of respondents say they would only pay for eyes-off driving if it maintains regular highway speeds. Moreover, when this condition is met, willingness to pay increases. 29% say they would pay a minor additional amount and 17% a meaningful additional amount, reinforcing full-speed capability as essential for both adoption and monetization.

Survey Report Findings



Key Benefits Meaningfully Influencing the Decision to Purchase an Eyes-Off Autonomous Driving System (Part One)

To open this research, we examined which benefits are most critical for drivers when considering an eyes-off autonomous driving system.

In the first category, increased safety ranks highest, with 53% of respondents rating it as a must-have and another 25% as important. This result reflects the elevated expectations drivers place on autonomous vehicles. While human error causes [90% of road accidents](#) today, drivers are far less willing to accept accidents caused by automated systems, making safety a baseline requirement.

When combining must-have and important responses, avoiding unnecessary emergency braking or abrupt maneuvers ranks nearly as high as safety at 75%. Drivers associate sudden stops and sharp corrections with phantom braking, reinforcing the need for HD radar to eliminate false alarms and restore confidence in autonomous systems.

Smooth, human-like driving also ranks highly and is closely tied to perception quality. Long-range detection and fewer false alarms enable gradual braking, smoother lane changes and predictable behavior, shaping an autonomous driving experience drivers are willing to adopt.

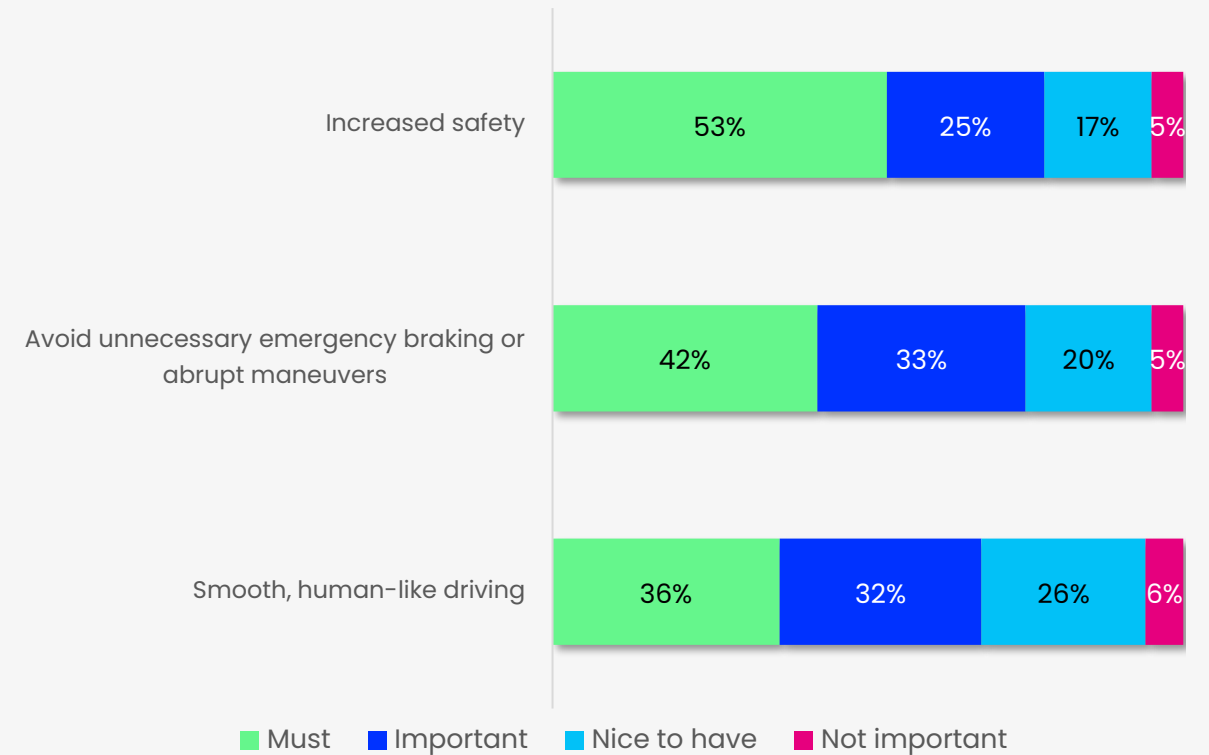


Figure 1: Key Benefits Meaningfully Influencing the Decision to Purchase an Eyes-Off Autonomous Driving System

Key Benefits Meaningfully Influencing the Decision to Purchase an Eyes-Off Autonomous Driving System (Part Two)

The most in-demand benefit in this category is systems that work in any environmental condition. 50% of drivers rate this as a must-have and 29% as important. While many autonomous deployments today operate in regions with favorable weather, real-world driving includes rain, glare, darkness, and seasonal conditions. Drivers expect eyes-off systems to function reliably at all times, not only under ideal circumstances. Meeting this expectation requires sensing technologies capable of maintaining perception performance across weather, lighting, and environmental variability, a level of robustness enabled only by HD radar.

Always-available, uninterrupted operation also ranks highly, with 43% rating it as a must-have and 33% as important. Drivers do not want autonomy that frequently disengages or requires sudden attention, especially when their focus has shifted away from driving. Delivering this level of continuity depends on advanced radar, which supports edge use cases and sustains reliable perception in scenarios where other sensing technologies may struggle.

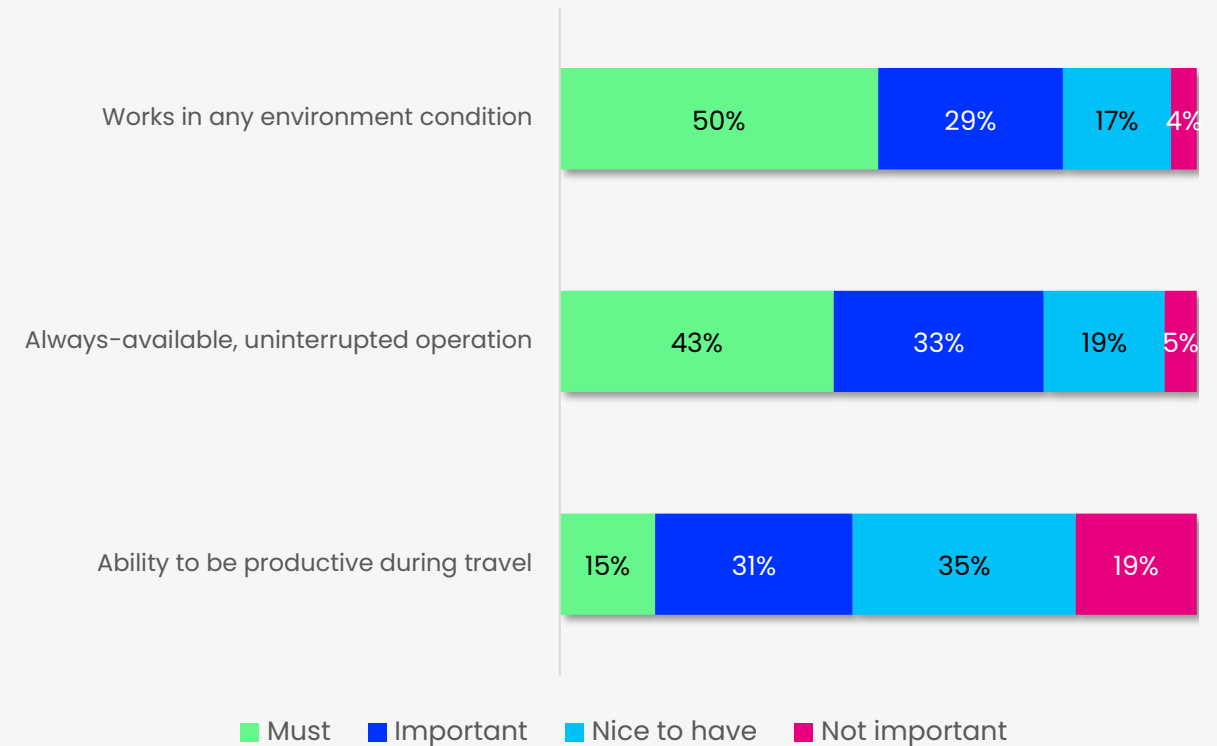


Figure 2: Key Benefits Meaningfully Influencing the Decision to Purchase an Eyes-Off Autonomous Driving System

Key Benefits Meaningfully Influencing the Decision to Purchase an Eyes-Off Autonomous Driving System (Part Three)

Maintaining regular highway speeds and flowing naturally with traffic ranks as another top driver priority. 39% of respondents rate this as a must-have and 31% as important. For drivers, eyes-off autonomy only delivers value if it operates at the same speeds as surrounding traffic.

Reliable eyes-off driving at highway speeds depends on long-range, high-resolution perception. At higher speeds, systems must detect and interpret distant or small objects early enough to respond smoothly. Without sufficient range and accuracy, they are forced to limit speed or return control to the driver. HD radar delivers the long-range resolution required to provide the braking distance and reaction time necessary for safe full-speed operation.

Preferences for maintaining highway speeds are consistently high across regions, with particularly strong interest in the UK, the US, and China.

In contrast, faster arrivals and time savings rank lower overall. While some drivers value reduced travel time, most prioritize stable, full-speed autonomy over marginal gains in arrival time.

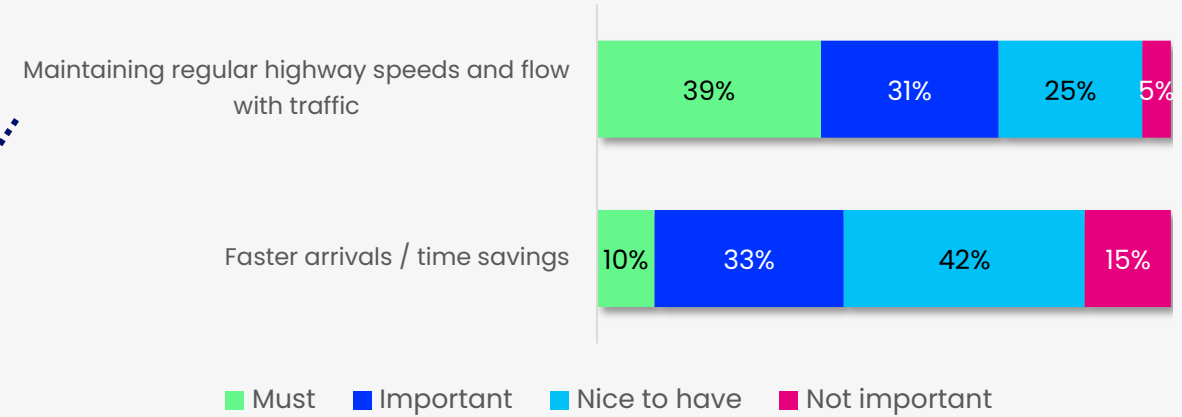
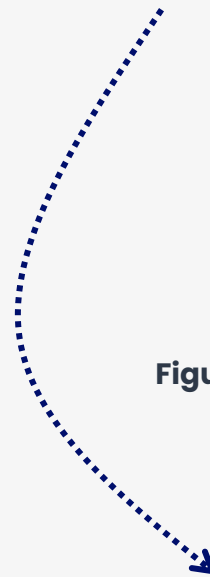


Figure 3: Key Benefits Meaningfully Influencing the Decision to Purchase an Eyes-Off Autonomous Driving System

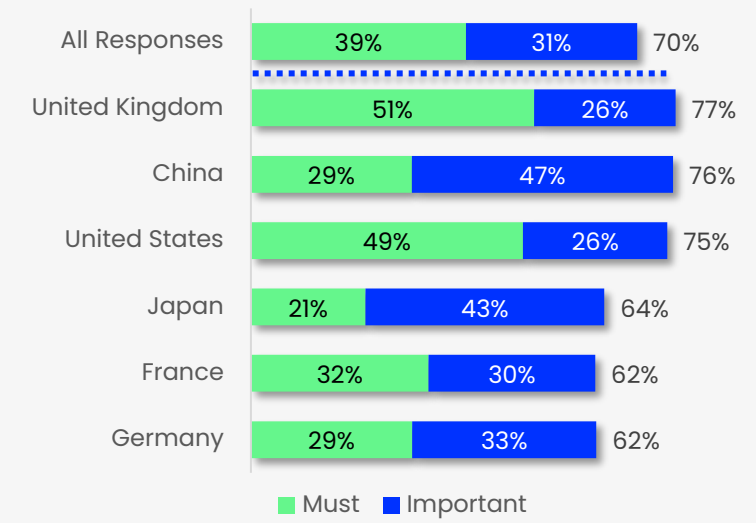


Figure 4: Maintaining Regular Highway Speeds and Flow with Traffic Must + Important Ratings by Country

Interest in Eyes-Off Driving Capability for Next Vehicle Purchase if Safety, Smoothness, and All-Condition Availability are Met

This finding represents one of the most significant shifts revealed in the research. When drivers are presented with eyes-off driving that meets their core requirements of safety, smooth operation, and availability in all conditions, interest rises sharply.

Overall, 77% of respondents say they are definitely or probably interested in eyes-off driving in their next vehicle purchase. This contrasts strongly with earlier research in which 60% of U.S. drivers reported being afraid to ride in a self-driving vehicle ([AAA, 2025](#)).

The results are consistent across geographies, signaling a broad change in driver sentiment. Interest is particularly strong in China, where a combined 94% express interest. Japan also shows high acceptance, reinforcing that once key conditions are met, eyes-off driving is no longer a niche ambition but a mainstream expectation.

To capture this shift, OEMs must upgrade to sensing technologies capable of delivering safe, smooth, all-condition, full-speed performance, as legacy systems will not meet rising driver expectations.

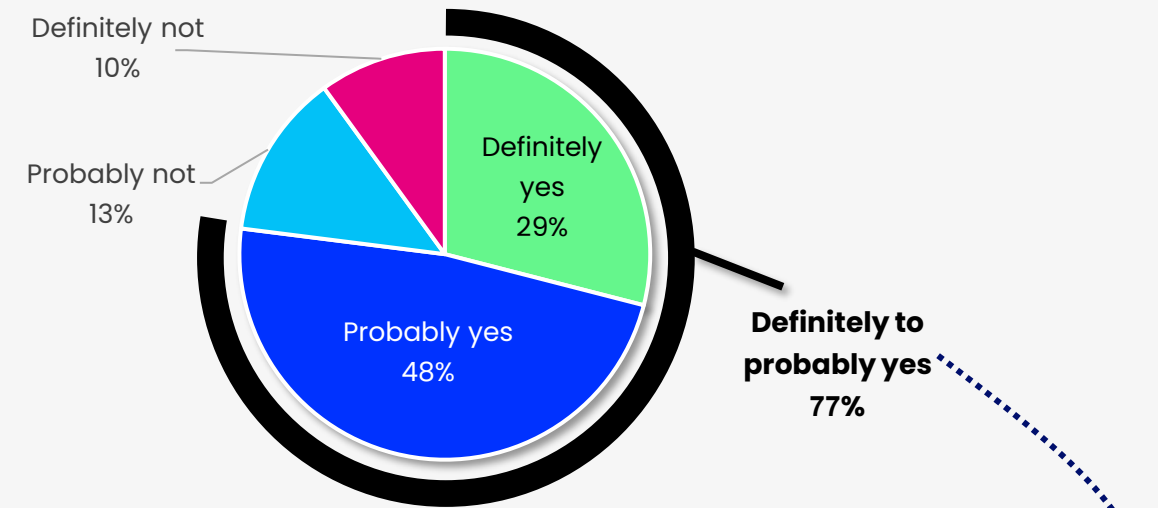


Figure 5: Interest in Eyes-Off Driving Capability for Next Vehicle Purchase if Safety, Smoothness, and All-Condition Availability are Met

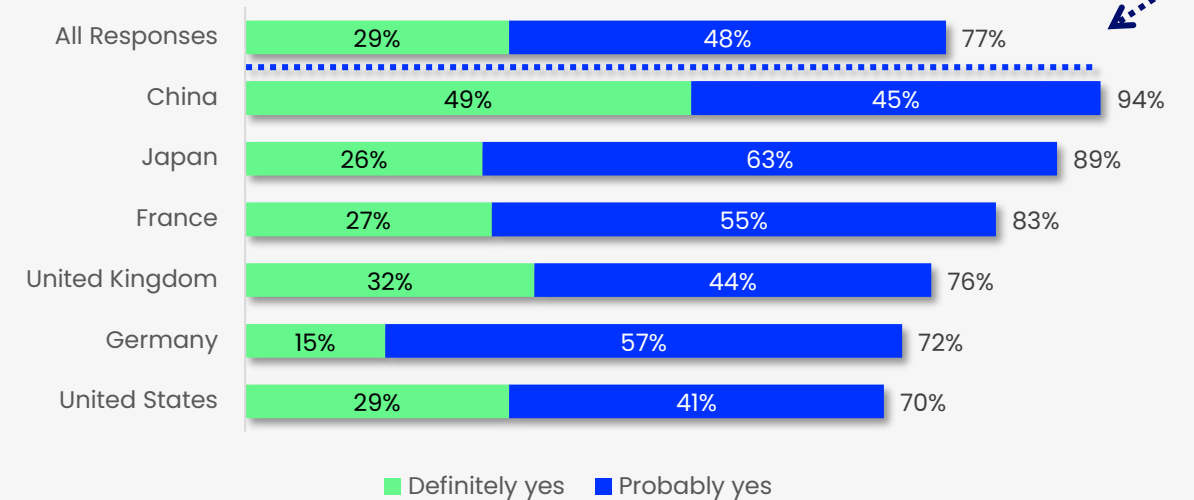


Figure 6: Definitely + Probably Yes by Country

Willingness to Pay Additional Monthly Fees for an Eyes-Off System That Functions Reliably in Darkness and Challenging Weather

Eyes-off driving is widely viewed as a capability suited to a subscription model, creating an ongoing revenue opportunity for carmakers beyond the initial vehicle sale. To explore this, respondents were asked how their willingness to pay would change if an eyes-off system functioned reliably in darkness and challenging weather, relative to existing systems priced at around \$100 per month that do not operate in all conditions.

The results show that all-condition performance is not a premium feature but a requirement. 43% of respondents said they would only agree to pay for eyes-off driving if it works in any weather and any lighting conditions. Without this capability, carmakers risk losing the entire subscription.

At the same time, all-condition reliability increases revenue potential. 26% of drivers say they are willing to pay a minor additional monthly amount, and 18% are willing to pay a meaningful additional amount for an eyes-off system that operates consistently in darkness and adverse weather. Such willingness to increase subscription charges is highly uncommon in automotive, underscoring the exceptional monetization opportunity tied to reliable all-condition performance.

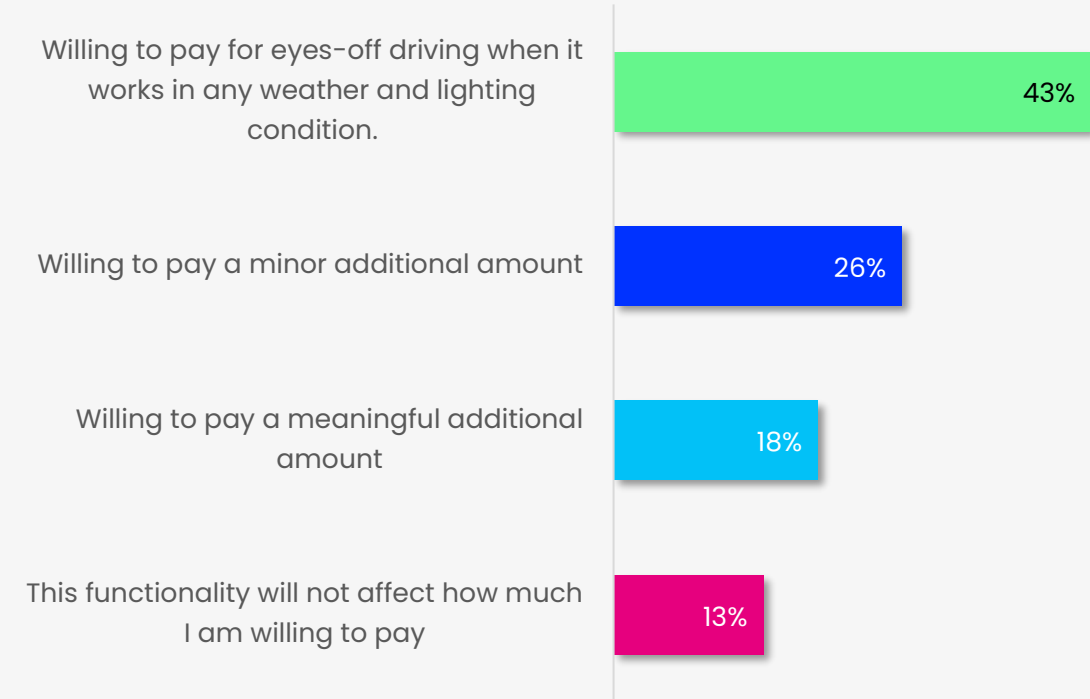


Figure 7: Willingness to Pay Additional Monthly Fees for an Eyes-Off System That Functions Reliably in Darkness and Challenging Weather

Willingness to Pay Additional Monthly Fees for an Eyes-Off System That Functions Reliably in Darkness and Challenging Weather (By Country)

Willingness to pay for all-condition eyes-off driving varies meaningfully by region, revealing different market dynamics.

In China and Japan, drivers show a strong readiness to pay extra for this capability. In Japan, 59% of respondents say they are willing to pay more. In China, willingness is even higher, with 83% willing to pay more and over half indicating a meaningful additional payment. This reflects early adoption behavior and strong demand for advanced autonomous features.

In contrast, drivers in Germany, France, the UK, and the US are more conditional. Between 46% and 52% of respondents in these markets say they would not pay for eyes-off driving at all unless it works reliably in all weather and lighting conditions. For these regions, all-condition performance is a prerequisite for monetization rather than an upsell. Without it, OEMs risk losing a substantial subscription revenue opportunity.

Across all geographies, only a small minority say this capability does not affect their willingness to pay, underscoring its central role in the value of eyes-off autonomy.

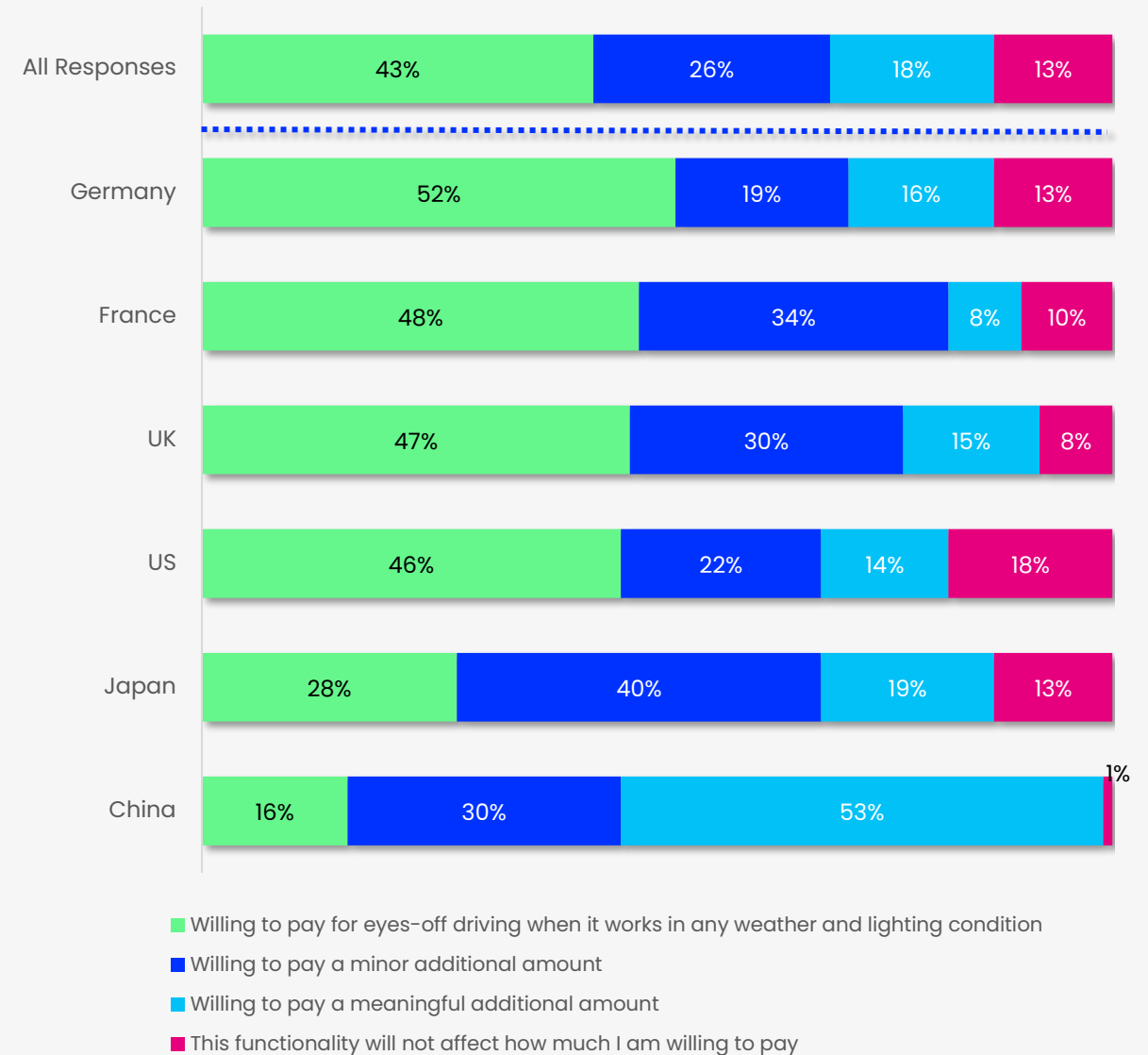


Figure 8: Willingness to Pay Additional Monthly Fees by Country

Willingness to Pay Additional Monthly Fees for an Eyes-Off System That Operates Reliably at Full Highway Speeds

Highway driving is expected to be the first widespread application of eyes-off autonomy, yet the inability to operate at full traffic speeds has limited eyes-off launches to date. To assess how strongly this capability influences value, respondents were asked how full highway speed operation would affect their willingness to pay for an eyes-off system priced at around \$100 per month.

The results show that full-speed performance is a requirement for many drivers. 38% say they would only agree to pay for eyes-off driving if the system operates reliably at full highway speeds. Drivers are unwilling to accept slow or restrictive autonomy that disrupts traffic flow or requires frequent disengagement.

At the same time, full-speed capability increases revenue potential. 29% of respondents say they are willing to pay a minor additional monthly amount, and 17% are willing to pay a meaningful additional amount for an eyes-off system that maintains regular highway speeds. Together, these findings highlight full-speed operation as both a gating factor and a monetization opportunity for eyes-off autonomy.

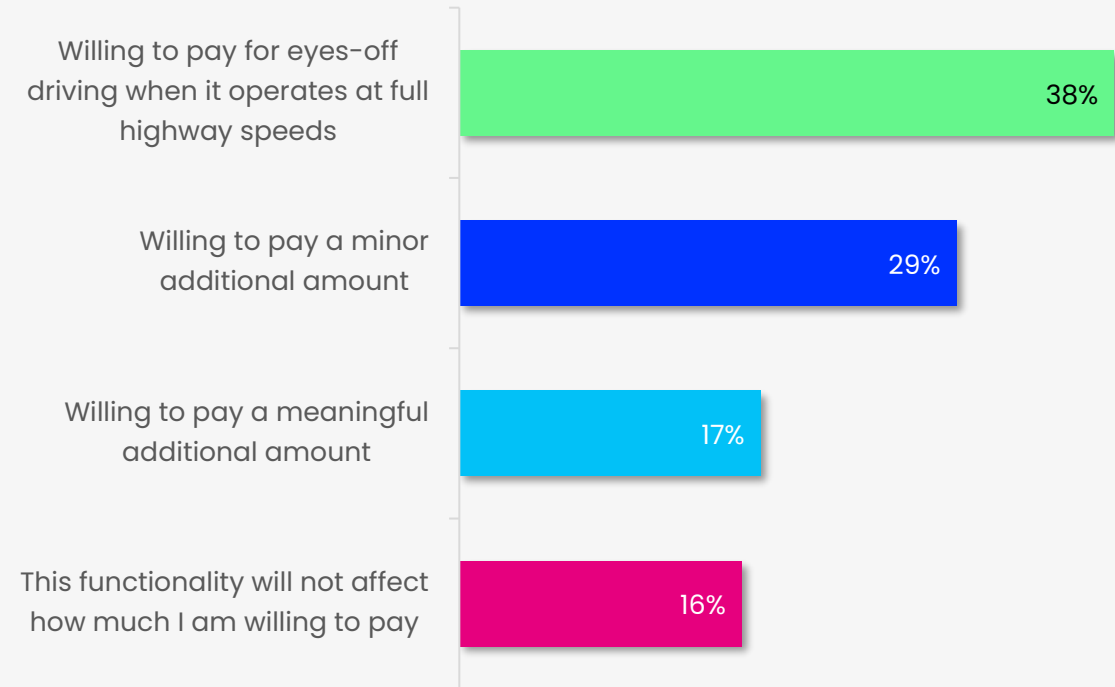


Figure 9: Willingness to Pay Additional Monthly Fees for an Eyes-Off System That Operates Reliably at Full Highway Speeds

Eyes-Off Autonomy Can Accelerate Purchases and Drive Brand Switching

Beyond feature preferences and willingness to pay, eyes-off autonomy has the potential to reshape core purchasing behavior. When presented with a safe, all-condition, full-highway-speed eyes-off system, a substantial share of drivers say it would change when and what they buy.

In total, 69% of respondents say they would be somewhat likely (27%), very likely (28%), or definitely likely (14%) to purchase a new vehicle earlier than planned in order to access eyes-off driving. This moves the impact well beyond a monthly subscription decision and into the full vehicle purchase cycle.

The effect on brand loyalty is similarly strong. 73% of drivers say they would be somewhat likely (38%), very likely (22%), or definitely likely (13%) to switch to a different brand if their current brand fails to offer reliable eyes-off autonomy. For many consumers, access to eyes-off driving outweighs existing brand preferences.

Together, these findings position eyes-off autonomy as a potential inflection point for automakers. It is not only a feature or revenue opportunity, but a capability that can influence sales timing, brand choice, and competitive leadership in the passenger vehicle market.

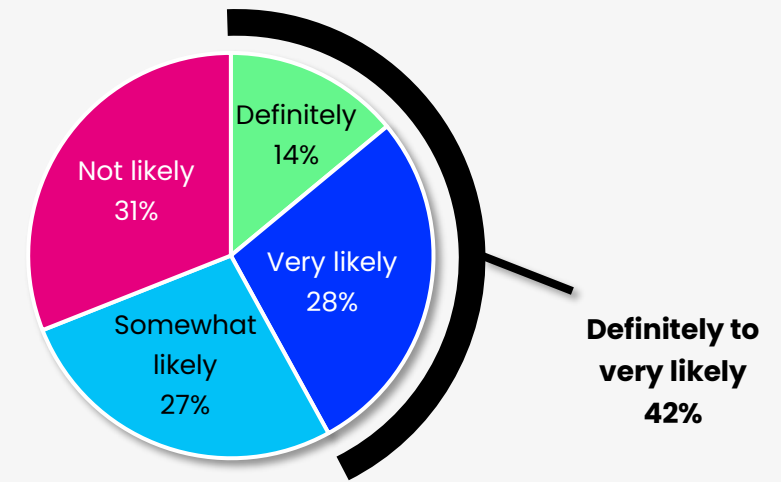


Figure 10: Likelihood of a Safe, All-Condition, Full-Highway-Speed Eyes-Off System Motivating an Earlier-Than-Planned New Vehicle Purchase

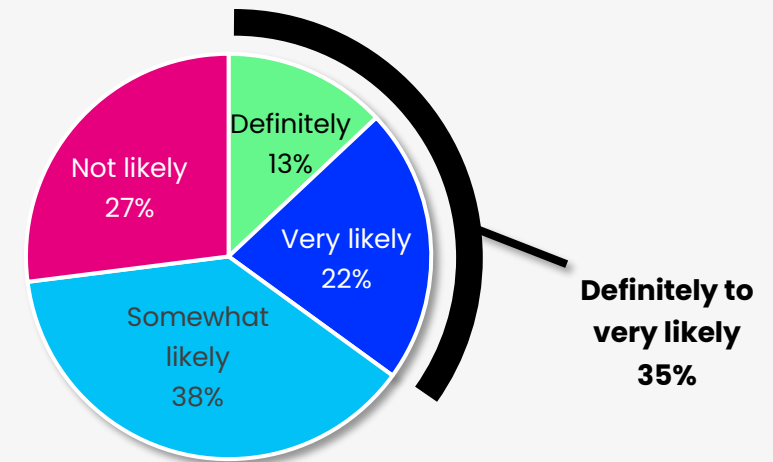


Figure 11: Likelihood of Switching to a Different Brand if the Current Brand Fails to Offer Reliable Eyes-Off Autonomy

Demographics



Country, Gender, Age and (All Respondents)

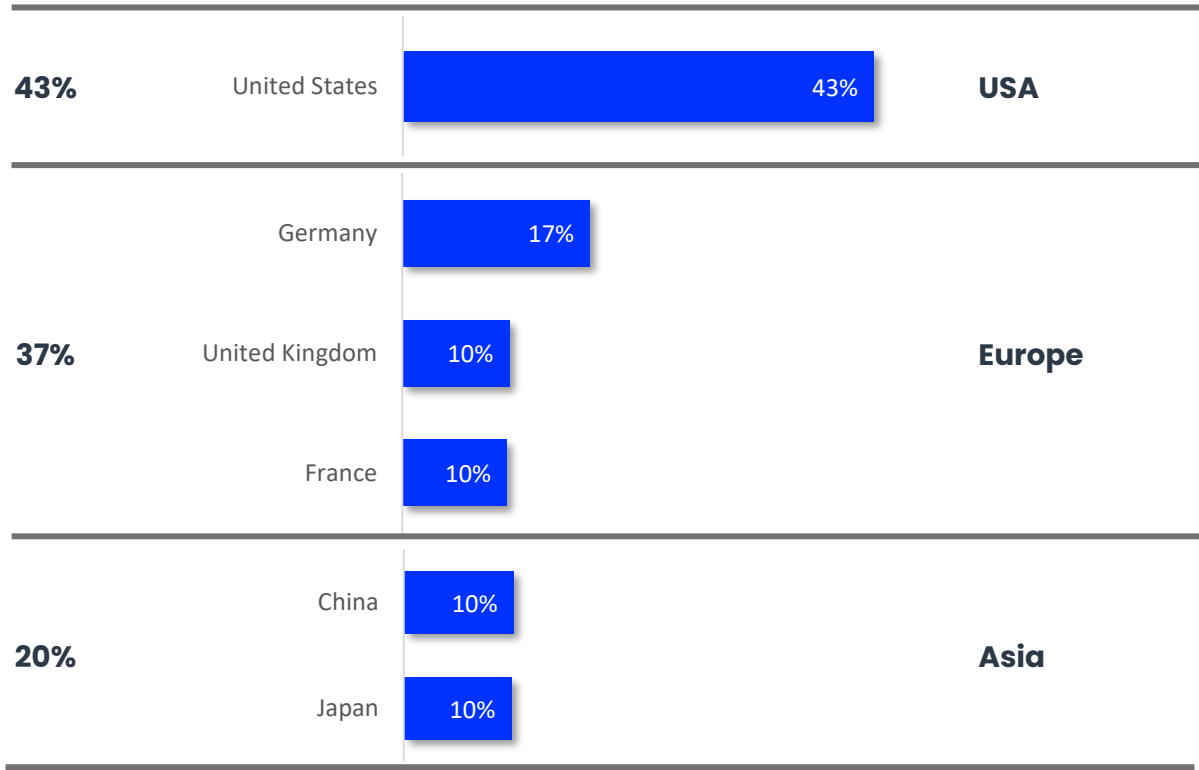


Figure 12: Country

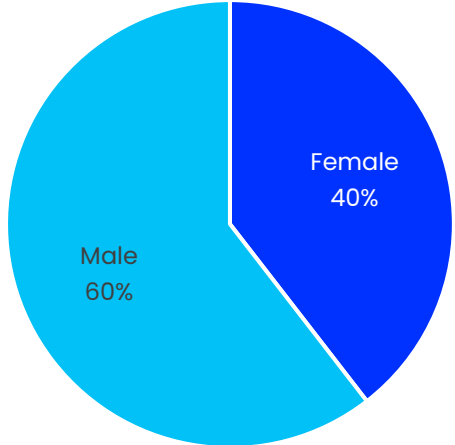


Figure 13: Gender

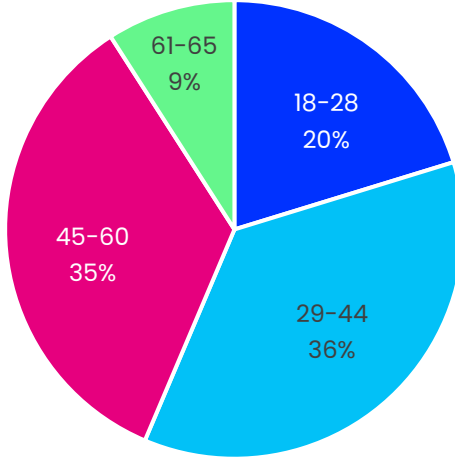


Figure 14: Age

Driving Behavior: Frequency, Duration, and Experience (All Respondents)

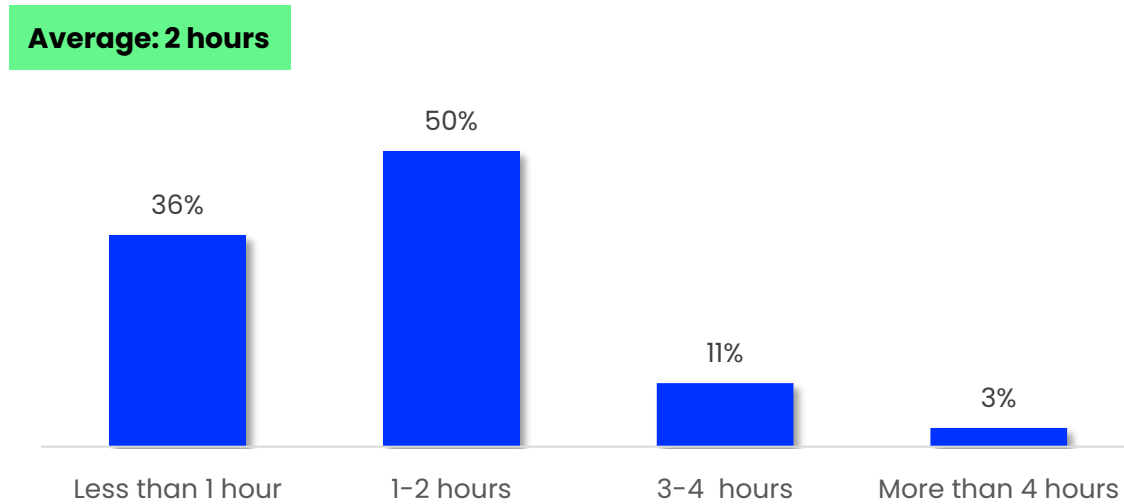


Figure 15: Average Daily Time Spent Driving

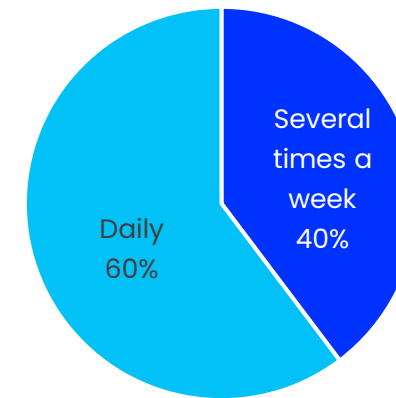


Figure 16: Frequency of Car Driving

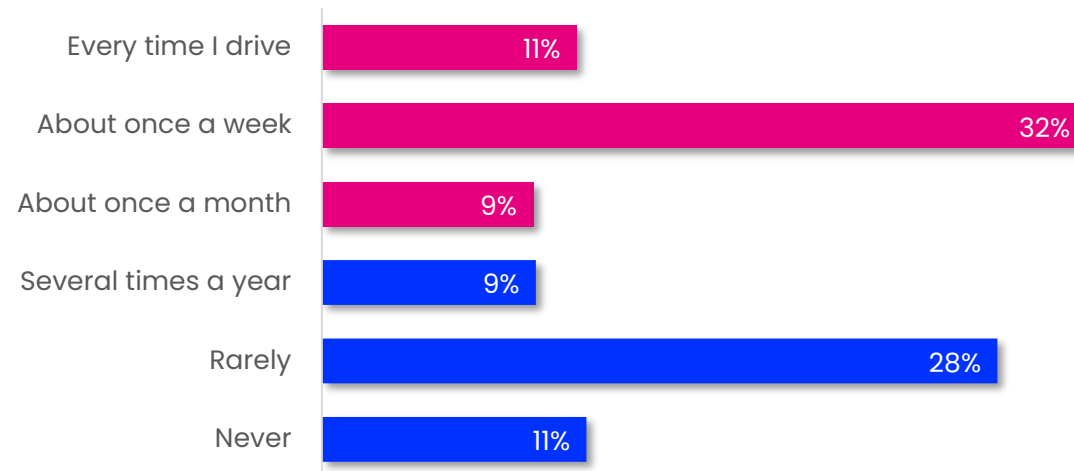


Figure 17: Stress or Frustration Experienced While Driving

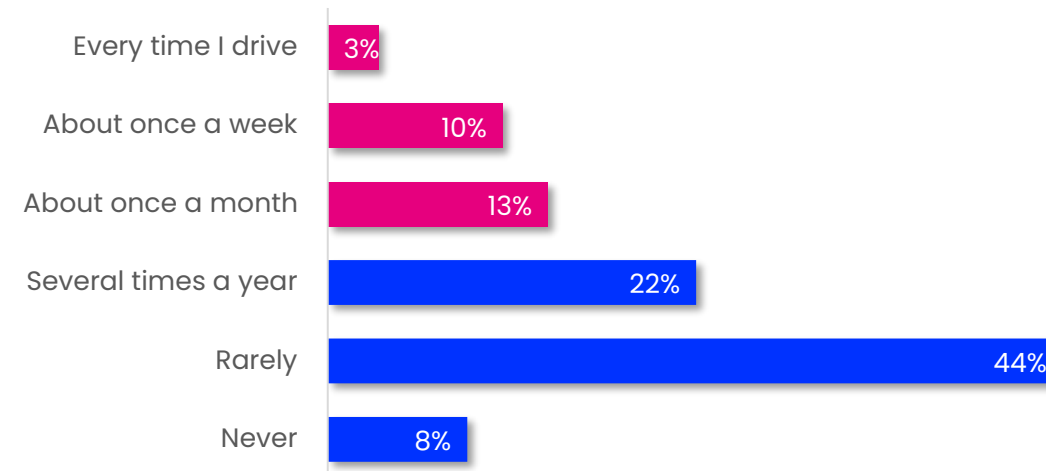


Figure 18: Near-Miss Situations and Potential Accident Risks

About Arbe Robotics

Arbe is driving a radar revolution. The company's high-resolution radar empowers autonomous systems with a comprehensive understanding of the driving scene, as well as dependable sensing that enables safe, human-like driving performance, providing automakers with the sensing foundation to deliver continuously available eyes-off systems at full highway speeds and across diverse environments. By delivering the long-range, high-resolution perception required for safe braking distances, reliable operation in darkness and adverse weather, and stable performance in edge use cases, Arbe directly enables the must-have conditions drivers demand.

At Arbe, we know that every detail matters. With the industry's largest channel count radar and a dedicated processor capable of handling throughput equivalent to 3 terabits per second, our radar provides dense environmental data and reliable performance in all conditions, improving object detection and separation and long-range tracking, eliminating false alarms, and reducing abrupt braking or maneuvering. These capabilities position Arbe's radar technology as the backbone of the sensing suite.

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arberobotics.com

Email: info@arberobotics.com

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