

Research Unplugged: AI, Autonomous Vehicles & the Future of Driving

While partly and fully autonomous vehicles are now operating in small scale, we think wide-spread adoption of L3/L4 technology remains a few years out. However, we think advances in AI technology will help improve the industry's tech readiness, driving higher levels of performance as well as increased adoption. In this podcast, we listen in as Mark Delaney, Kota Yuzawa, Allen Chang, and Eric Sheridan join Chris Hussey, to discuss the current landscape for autonomous driving, AI's role in accelerating adoption, as well as our updated ADAS and AV forecasts.

The full list of speakers topics is below, with approximate start times in parentheses.

Speakers & Topics:

(0:30) Introduction

- Mark Delaney – US Autos & Industrial Tech Analyst

(1:56) AI's role in Autonomous Driving

- Allen Chang – Greater China Technology Analyst

(5:00) Digging into Autonomous Tech

- Kota Yuzawa – Asia Auto Analyst

(7:54) By the numbers: the economics of robottaxis

- Mark Delaney – US Autos & Industrial Tech Analyst
- Eric Sheridan – US Internet Equity Analyst

(14:35) Ridesharing Outlook

- Eric Sheridan – US Internet Equity Analyst
- Mark Delaney – US Autos & Industrial Tech Analyst

(19:14) Favorite Ideas

- All

(29:03) Audience Q&A

Chris Hussey

+1(212)902-7564 | chris.hussey@gs.com
Goldman Sachs & Co. LLC

Sarah Herr

+1(212)357-0094 | sarah.herr@gs.com
Goldman Sachs & Co. LLC

Mark Delaney, CFA

+1(212)357-0535 |
mark.delaney@gs.com
Goldman Sachs & Co. LLC

Kota Yuzawa

+81(3)4587-9863 | kota.yuzawa@gs.com
Goldman Sachs Japan Co., Ltd.

Allen Chang

+852-2978-2930 |
allen.k.chang@gs.com
Goldman Sachs (Asia) L.L.C.

Eric Sheridan

+1(917)343-8683 |
eric.sheridan@gs.com
Goldman Sachs & Co. LLC

- All

Moderator:

- Chris Hussey – US Research Merchandising

Relevant Research:

- [Global Autos & Industrial Tech: Can new AI technology help accelerate AV deployments? Updating our global ADAS and AV forecast](#)
- [US Autos & Industrial Tech: More measured pace of lidar adoption and still negative FCF; Downgrade INVZ to Neutral, stay Sell rated on LAZR](#)
- [Americas Technology: Internet: Ridesharing & Delivery Q2'24 Preview: Analyzing the Industry Debates & Estimates](#)
- [GC Tech: ADAS/ AV spec upgrade towards L2+ NOA functions; L3/ L4 commercial progress](#)
- [Global Automobiles: Autonomous Vehicles: The Road Ahead: New profit pool emerging](#)
- [The Evolution of ADAS: Assessing the semiconductor opportunity underpinning the next level of automotive safety and convenience](#)

Related Podcasts:

- [Research Unplugged: Global Autos: 2024 Outlook & Takeaways from CES](#)
- [GS Exchanges: The future of four wheels: episode 4, how a new kind of car will change our world](#)
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