

USERS' ATTITUDES TOWARDS

ELECTRONIC ACTIVE SAFETY

SYSTEMS IN VEHICLES

QUALITATIVE STUDY IN SIX EUROPEAN COUNTRIES

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This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

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INTRODUCTION

- ❖ **The European Commission – Directorate-General Information Society – has commissioned OPTEM and its partners in six European countries¹ to carry out a study on the subject of electronic active safety systems in vehicles, among different categories of road users.**

This study was conducted under the aegis of the Framework Contract Eurobarometer “Qualitative Studies”².

- ❖ The study’s main **objectives** are to assess :
 - The present situation in terms of information and knowledge of systems now existing or being developed
 - The nature and intensiveness of expectations, whether active or latent, in this respect
 - The role which certain professional actors can play as influencers and promoters of the development of safety through these systems
 - Orientations and means of information and communication that can be envisaged
- ❖ In each of the countries concerned, the study is based on a combination of **group discussions** and **personal in depth interviews**.
 - 2 group discussions with car owners : for one of the groups, owners of high and medium-high range cars (mostly bought new) ; for the other, owners of low and medium-low range cars (bought new or second-hand).
 - A series of 20 interviews with :
 - Professional drivers
 - Vehicle fleet managers
 - Car salesmen (of makes characteristic of the local market)
 - Driving school teachers
 - Pedestrians (non users or rare users of cars)
- ❖ **This document is the overall report of the six-country study.**
- ❖ It includes, in the annexes:
 - The identity of OPTEM’s partner institutes in each country.
 - The composition of the samples interviewed (in March and April 2006).
 - The discussion and interview guides used for the different categories of respondents.

¹ Germany, France, Italy, Poland, Finland and the United Kingdom

² Framework contract set up and managed by Directorate-General Communication – A/4

SUMMARY OF RESULTS

- ❖ The attitudes of motorists in the different countries towards electronic safety systems are remarkably homogenous, despite a few differences of a cultural nature or referring to an unequal maturity of the various markets as regards cars.
- ❖ These attitudes are characterised by **considerable ambiguity, or indeed a paradox between the declared importance of motoring safety in the rational discourse and the fact that it actually plays a minor role as a selection criterion when choices are made.** More generally, it appears obvious that motorists are disinclined to pay for safety equipment offered as optional extras.
- ❖ This paradox stems from the complexity of the mechanisms involved in choosing a car and the strong overlapping in this choice of rational and emotional components that could come into conflict and generate unexpected choices. There are several levels at which this can be explained:

- First of all there is **the perceived high level of safety in modern cars**, both in terms of design and equipment, which means that these days **there are no longer any notable differences in safety between models of the same segment.**

Such differences do continue to exist between a small car and a high-range saloon, basically on account of the size. On the other hand, **equipment** is tending to become characteristic across the board, as illustrated by the example of airbags and ABS.

This trend in the market corresponds to a basic demand of motorists, who regard safety as a right and no longer accept the idea of there possibly being any social inequality in this respect: it does not seem ethically justifiable for some items of equipment to be reserved for expensive vehicles. Some people also feel that this argument could also be a way of “kicking the ball into touch” when they are confronted with the possibility of having to pay for an accessory as an optional extra.

- **The problem of price**, which remains a fundamental criterion in the purchase of a car, is also one of the keys to motorists’ circumspection as regards **electronic safety equipment**, which includes sophisticated, and therefore expensive, systems. These therefore **often come into conflict with other accessories, the benefit of which can be grasped more immediately.** Between a safety accessory, which one would like never to have to use, and an accessory that improves the quality of life in day-to-day use, the motorist tends to prioritise the latter.

This has two kinds of consequences for electronic safety systems:

- The motorist will only choose those he deems to be absolutely **useful and necessary** bearing in mind the use he makes of his car.
- He will ask that these useful and necessary systems not be optional extras, but be **included in the purchase price.** Some people even think that these should be made legally obligatory, and therefore be fitted in a compulsory fashion in all vehicles.

- Aside from the price, there are **other, more psychological**, but also important, **obstacles** to the adoption of the systems in question. They stem partly from the **image of electronics** and partly from the **effects of these systems on the driving experience.**

Anything electronic is reckoned to be expensive and fragile. Non-reliability is especially damning for systems supposed to guarantee safety.

The effects on driving experience are even more conflicting:

- Whilst safety systems are valued when they are perceived as giving the driver **assistance and aid** in situations and circumstances that are dangerous but beyond his control, on the other hand, they are perceived as unbearably **moralising or a curb on one's freedom** when they aim to crack down on contravening behaviour and – even more so – impact on driving. In this respect, they generate a feeling of **dispossession** which is intolerable for most motorists, and involve a risk of the driver's **responsibility being removed**.
 - The perception of a **whole host of warnings** – sound, visual, or mechanical – during driving is considered to be counter-productive, or even dangerous, and prompts the desire to disconnect these systems (there being, in addition, a widespread request for this possibility of disconnection).
- ❖ More generally, the driver is moved by **two contradictory desires**:
- He needs to be assured of the presence of a number of accessories that are judged to be essential.
- But
- He wants to be able to forget this equipment in a normal driving situation, since it refers to accidents, which is a situation one tends to want to conceal.
- ❖ **The various safety systems** submitted to the judgement of motorists **are given very wide-ranging appraisals**:
- **Some** are considered as wholly **essential and indispensable**. In this respect, motorists then say that they should be obligatory – and thus fitted as standard and included in the price of the vehicle.
 - **Others** are regarded as **interesting for some kinds of use** of the car and may then be envisaged by certain types of drivers. However, even in this case, the proclivity to purchase will depend substantially on the price and image of the equipment.
- It appeared clearly that image also plays a role as regards safety. It may be flattering for a customer to have this or that item of equipment, which is talked about or reckoned to be very sophisticated or effective. The best illustration of this is the desirability of equipment perceived as linked to GPS.
- This means that the argument in favour of these systems need not be too simplistic and concern all the dimensions of perception. Bearing in mind the obstacle that the price of these systems represents, their inclusion in a well-composed pack is also a way of getting them accepted more readily.
- ❖ Among the systems that were brought to the interviewees' attention:
- **ESP** is probably destined, fairly swiftly, to enjoy the **favour** currently enjoyed by **ABS** – although it should be recalled that it took fifteen years, and the generalisation of its fitting as a standard item, for the latter to acquire the image of an indispensable item of equipment.
- The electronic emergency alarm** seems destined to enjoy an identical **support**.
- **Other items of equipment** arouse a **more circumspect interest** and clearly minority option purchase intentions at the moment:
 - Adaptive headlights.

- Driver condition monitoring.
 - Warning of dangers in the local area the driver is driving through and real-time information and navigation system – perceived as improvements of or additions to GPS, and less for the safety provided than for the comfort and convenience afforded the driver, in particular to enable him to choose an alternative route in time.
 - Obstacle and collision warning – system that leads to more questions and scepticism.
- Lane departure warning and speed alert only meet with a **low level of interest**, and are often even rejected.
- ❖ It should be observed, moreover, that these systems should each be promoted for the specific benefit they are liable to bring – without seeking first to fix in people’s minds a **more general concept of active safety** which is still **very obscure**.
 - ❖ **No fundamental differences** in attitudes towards electronic safety equipment are seen **between the countries**, be it positive motivations or obstacles in their regard. When there are differences, they tend to express disparities in maturity between the markets (which are liable to fade in time) rather than deep-seated cultural differences.
 - ❖ Likewise, the different categories of participants in traffic do not prove to be highly discriminatory. Their attitudes often reflect different weightings in hierarchical systems. It is more membership of certain sociological categories (criteria of age, sex and family status) and the use made of the car that determine attitudes. This is what explains the fact that in the end it is the **level of range** of the car owned that emerges as the most differentiating criterion among private car owners.
 - ❖ **The attitudes of professional users do not appear to be radically different.** Lorry drivers or drivers of commercial vehicles, as well as their fleet managers, however, seem inclined to recognise more a specific interest in ESP, systems for the monitoring of the driver’s state of alertness, warnings of hazards in the area to be driven through, and real-time information and navigation systems.
 - ❖ **As regards the potential opinion formers** for these systems, **in fact they barely seem like active influencers** in the current state of affairs.

For car salesmen, it seems clear that most of them will not take the commercial risk of arguing strongly in favour of safety devices, rather than other more immediately valued items of equipment, if they think that customers are not especially taken by them already.

Driving-school instructors often show themselves to be more reluctant than motorists themselves about new systems, since they fear the loss of inhibitions and the removal of a sense of responsibility that these systems can cause.

In the eyes of potential customers, they do not constitute privileged sources of information: car salesmen because they are considered to be biased a priori, and driving instructors, though less markedly so, because they are not always recognised as being competent when it comes to technological matters.

- ❖ **The sources that are judged a priori to be credible** include public bodies (but for awareness-raising measures of a general nature rather than for actively promoting a particular type of equipment), car manufacturers through the technical information they distribute (including on their websites), and the specialist media – apart from word of mouth, which is very important when it comes to cars.

Automobile clubs and consumers' associations are given varying appraisals according to the country. Insurance companies, of which many consumers are distrustful, can be acknowledged to be authoritative as regards automobile statistics – and would be effective through reductions in premiums.

- ❖ **Financial incentives could of course encourage the adoption of safety systems** – at least for those that seem to be most attractive and are regarded as being of specific interest.

However, they should be **quite substantial in order really to prompt users** – or rather only some of them – **to take the initiative to choose such systems** rather than wait for them to become generalised as standard features.

DETAILED RESULTS

CHAPTER I:

VEHICLE USAGE AND

DRIVING EXPERIENCE

- ❖ It will be recalled first of all that a sample had been put together for this study which would be liable to take in all possible attitudes regarding electronic safety systems fitted in cars, taking into account the points of view of the different types of road user, whose interests could be conflicting:
 - **Motorists**, who were recruited in two distinct target groups in order to gain an understanding of the various ways in which cars are used and to represent the main types of driver:
 - Owners of low- to mid-range models, whose annual mileage is on average around 10,000 km or less. These are people who mainly drive in urban areas – with the exception sometimes of one or two long journeys per year. For most, these drivers nonetheless use their car every day (for travel between home and work, dropping off and picking up the children, shopping and leisure activities).
 - Owners of mid- to high-range models, generally average or intensive drivers (clocking up between 15,000 and 50,000 km, with quite a high concentration in the 20-35,000 km bracket), often using their car both for personal and professional requirements and regularly driving on main roads and motorways.
 - **Professional drivers**, lorry drivers, deliverymen, taxi drivers, all obviously clocking up a high mileage (up to more than 100,000 km per year for the former) with differences linked to the activity (taxis are used more in urban areas, lorry drivers operate more on main roads and motorways, in their own country and abroad, deliverymen in one or the other of these environments) and **fleet managers**.
 - **Potential opinion formers – sellers of new cars and driving instructors** – who reflect both the opinion of motorists, which they are, and that of motorists or future motorists whom they meet in their professional life and to whom they are prompted to make recommendations.
 - **Pedestrians** who only very rarely use the car, if at all – among whom we can make out two main types:
 - **“Anti-drivers”**

These are people who refuse to drive and generally do not have a licence. They are either people living in a city where they feel they do not need a car (they use public transport), or people who think that they cannot afford to have one and run it. Generally speaking, they also regard driving as too stressful. These people rationalise their behaviour by valuing it as environmentally responsible.

“Living in a city to own a car is not a must. It would add to more pollution and to traffic... indeed I don’t own a car. I walk, ride my bike, use public transport to relocate in Milan and its suburbs, metro and buses. I use the train to reach extra-urban destinations. I fly longer legs. I certainly think that most people in a city should use public transport and avoid creating traffic jams together with higher levels of pollution...” (Pedestrians, Italy)

In both cases, there are individuals who are very reluctant vis-à-vis the car – which they accuse of all kinds of evils – and driving – which they regard as stressful and potentially dangerous. In all the countries this group harbours a latent aggressiveness towards motorists and considers itself threatened by the omnipresence of cars in the city and the cult of the car.

“I don’t feel safe, there is too much carelessness on the road, no attention is paid to pedestrians. There is a “car cult” not a “pedestrian cult” in Poland” (Pedestrians, Poland)

“Car drivers are more and more aggressive. Not only car drivers in fact but cyclists and pedestrians as well” (Pedestrians, Germany)

*“Car drivers know no law: they don’t stop at zebra crossings although they should, they stick to the bumper of the car in front so that you cannot cross between two cars”
(Pedestrians, Germany)*

- **Sporadic drivers.**

These are people who enjoy the car for its qualities of convenience and practicality, but feel that its use on a daily basis is too restricting (congested cities, problems for parking) or too costly.

Their car may be used daily by their partner, with they themselves only driving every now and then (to relieve the main driver on long journeys, or to go shopping at the hypermarket).

Pedestrians use public transport a lot and are often also **cyclists**, which puts them in another position in relation to car traffic, in which, however, they also feel they are placed at a disadvantage.

- ❖ As could be expected, it is more the belonging to these **types** of road users, than according to the **countries**, that the differences in attitudes regarding the subject of the study are established.

Of course between the countries there are differences of a cultural nature (between Italian motorists who are very keen on in-car equipment and British motorists who seem to ignore it, between French drivers, who have speed prohibitions, and German drivers, who consider motorways without speed limits as an area of freedom) which we will come back to in the analysis when they are significant. However, overall the differences in attitudes to safety and electronic active safety equipment are expressed more in function of **socio-demographic** criteria and criteria of **use**:

- Between men and women, between families and people who do not have children.
- Between car users in urban areas, average drivers – essentially owners of low- to mid-range models – and intensive drivers – essentially owners of mid-to high-range models.

- ❖ Before tackling the subject of safety equipment, we set about analysing the **emotional context of driving** which serves as a backdrop for it and provides the key to understanding it.

It will be seen first and foremost that all the motorists questioned associate driving with **positive emotions**. The **negative aspects**, mentioned in a more secondary fashion, are **essentially of a rational nature** and less directly linked to driving itself (difficulty of finding parking places, rising costs). **Driving pleasure** presents many facets and can be experienced in very different ways:

- For everyone (apart from the pedestrians mentioned above), the car is first and foremost associated with a feeling of **freedom**. For motorists, it is the feeling of total independence in relation to the timetables and constraints of public transport. For professional drivers, in particular lorry drivers, it is the feeling of occupying a reserved territory where you do not have to answer to anyone.

*“Pleasure, this sense of freedom, you can decide yourself what to do. I like driving (...)”
(Professional drivers, Poland)*

- Driving pleasure can also be **linked more to situations** – the pleasure of travel in optimal conditions of comfort – or more to **driving itself** (the pleasure of control of the machine, and a liking of speed in the country with no speed limit on the motorways). In the former case, the motorist’s mentality is more that of a passenger of the vehicle he is driving, whilst in the latter he is more the driver.

It is worth stressing that even professional drivers – and in particular lorry drivers, for whom driving is their work and who are at the wheel day in day out – continue to regard driving as a pleasure.

- ❖ The constant increase in the level of equipment in cars for greater comfort and enhanced safety should be considered as the key to the very positive way in which driving is experienced. But driving pleasure also stems from the conditions of the context: the positive feelings generally refer to optimal conditions: a summer’s day, a dry road, a journey made for pleasure, not much traffic on the road.

Conversely, displeasure and a **certain feeling of insecurity** take hold when **the conditions deteriorate**: poor weather, poor visibility, heavy traffic.

“Driving in heavy traffic during rush hour is really unpleasant. On the other hand, driving at night in summer, when there are only a couple of other people on the road is the most enjoyable driving ever” (Car owners – Medium-high range, Finland)

Certain situations are regarded as **especially anxiety-inducing by some categories**:

- Night driving (mentioned in particular by women and elderly people).
- Driving in towns and cities (cited by some taxi drivers, because stress factors abound).

“You always have motorbikes and bikes on the wrong side of the road, or running in the taxi reserved lanes, pedestrians crossing wherever, disregarding zebra crossing or lights... these are my daily worries” (Professional drivers, Italy).

- ❖ Apart from the conditions of the context, motorists regard **the other** categories of road users **as a risk factor**, since they constitute the uncontrollable element of the traffic (although every driver feels both safe and responsible as regards his own behaviour): it is always “others” who do foolish things, exceed the speed limit, or commit offences.

“The worst thing about driving, the thing that worries me most is that which I can’t control: other people on the roads. You can be a safe, sensible, law abiding driver, but if a young idiot paying no attention to the road drives past you it’s in God’s hands” (Car owners – Low-medium range, United Kingdom)

It was noted in particular, and across the board in all countries, that **some categories** of road users are considered to be a **particular danger** – for **themselves** and for **others**:

- **Owners of two-wheeled vehicles** (unpredictable and reckless, reinterpreting the traffic rules).
- **Elderly people** (hesitant, with poorer reflexes, pedestrians or drivers).
- **Beginner drivers**, especially young men (too reckless, driving too fast, not sufficiently aware of the danger).
- **Children** (unpredictable, the risk of them not being seen).

- **Lorries** (very powerful, feel as though they own the road), in the view of **motorists** (but more so **motorists** – lacking the control of the professional – in the view of **lorry drivers**).

- ❖ **Pedestrians** are obviously a case apart. They are the weak link in the traffic context and feel potentially threatened both by the shortfalls in infrastructure (not enough rights of way or cycle paths) and by the perceived aggressiveness of motorists, which seems to them to reflect the expression of a general increase in aggressiveness in society.

- ❖ The comments made by **potential opinion formers** (driving instructors and car salesmen) on this introductory theme provide an indirect confirmation of the elements cited above – they were questioned on what they thought motorists' feelings were on the issues raised. They sometimes mention the wide range of attitudes and behaviour according to the drivers, but generally without providing a different perspective.

CHAPTER II:
VEHICLE CHOICE FACTORS

II.1 CRITERIA OF CHOICE FOR PRIVATE CUSTOMERS

- ❖ The choice of car is the result of a balancing of the purchaser's specific needs, bearing in mind his budget and his particular relationship with the car, which generate **a number of priorities**. It is these priorities that will serve as criteria for choice between the models.
- ❖ In this respect, some dimensions prove to be decisive for all motorists in all countries:
 - **Aesthetic attractiveness** as an inevitable filter for interest and – to a lesser degree – a factor of enhanced social standing.
 - **The price** – always considered in function of the composition of the equipment offered as standard (impression of “having something for one's money”).
 - **The make** which acts as a guarantee and a marker on a number of decisive dimensions (quality, comfort) and acts through its image and through the personal experiences of the motorist.
- ❖ Beyond these fundamental criteria, we note:
 - The growing importance of the demand for **comfort** in choices. This importance is expressed both **in terms of space** and interior **capacity**, with a growing demand (especially noticeable in France) **for modular adjustability**, and in convenience **of on-board equipment**.
 The importance of the **equipment** is all the more considerable in that it acts both at a rational level – through its direct influence on driving comfort – and at a more emotive level via the status effect (the effect of an enhanced standing provided by vehicles fitted out with plenty of devices and/or equipped with leading accessories that can act as a social marker). Thus the infatuation for ESP in several countries seems to stem from its upmarket image as much as from its real usefulness.
 - The declining importance of **performance levels**, linked to speed restrictions on motorways in most countries, and especially noticeable in Member States whose authorities have undertaken tough measures to combat speeding (France and Finland). However, they remain a not inconsiderable criterion for choice that can come into play at various levels:
 - For the owners of mid- to high-range vehicles as a proof of power, expressed chiefly in speed (in Germany in particular).
 - As a corollary of comfort, in liaison with certain types of equipment which “cost power” (automatic gearbox).
 - As a vehicle for safety when power is considered as a reserve. This argument is mentioned more keenly by motorists with low- to mid-range vehicles to justify the fixing of a minimum power, and generally in France, where power is not justifiable by speed.
 - The differentiated importance of the criteria of **durability** and **solidity**.
 Day-to-day reliability is obviously an imperative requirement. Durability and solidity are still fundamental for German motorists, their requirement referring strongly to cultural factors. In France some car salesmen think that motorists have a tendency to renew their car more often than before, which minimises the importance of this criterion. In Germany salesmen establish the opposite hypothesis – the economic context tending to encourage people to space out their purchases, all the more so since modern cars have progressed in leaps and bounds as regards quality.

- ❖ Two criteria deserve special analysis, **consumption** and **safety**. In both cases, these are criteria **mentioned very little** by motorists **spontaneously** (when they are mentioned, it is more in a secondary manner, “in addition to” other criteria cited with more emphasis) but the importance of which is deemed to be decisive when they are suggested in the exploration – or when they are presented in the form of a list:

- **Consumption** is obviously important because it has a direct influence on the costs of using the car and the increase in petrol prices of recent months is viewed with some alarm. This leads to a number of motorists saying that they will pay extra attention to this criterion in the future.

However, motorists feel relatively **impotent** vis-à-vis consumption, as soon as they choose a size of vehicle determined by their needs, the differences in consumption between models of the same engine power seeming to be relatively minimal.

In several countries (Germany and Italy), salesmen note that consumption is certainly a traditional question raised by customers, but that it does not really have any effect on their choice.

“The clients are still asking, but in fact it does not have any influence on their decision. Nowadays you don’t find cars which use 30 litres per hundred anymore” (Car salesmen, Germany)

Finally, motorists genuinely worried about consumption opt for diesel.

- **Safety**

The problem of safety is even more complex. Bearing in mind the potentially dangerous character of a car and the responsibility that motorists shoulder for others, it seems **vital** to have a vehicle offering the greatest possible safety.

However, the **arbitrational value** of safety is **diminished** due to the fact that **new** vehicles from the **same segment** are reputed to have a relatively equivalent level of safety – with an image bonus accorded to some makes, especially high-range German makes. This observation is valid in all the countries.

“It is not a criteria any more, all vehicles have them” (Car owners – Medium-high range, France)

“I am fairly confident I’m not driving a death trap, and that’s all I feel I need to know” (Car owners – Medium-high range, United Kingdom)

“I don’t think you ask about what brakes it has or whether it’s got sufficient crumple room when you’re buying a car. You’re too busy thinking about what it looks like and the way it feels to drive. The safety issue aren’t top of mind” (Car owners – Low-medium range, United Kingdom)

“Cars are getting safer and safer. The differences between makes are disappearing. When a builder starts with a safety equipment, the others follow. It started with one airbag for the driver, then one for the passenger. Now you are surrounded with airbags” (Car owners – Low-medium range, Germany)

“We all have big and new enough cars to ensure high class safety features. It is the size (model) and quality class that ensure safety automatically” (Car owners – Medium-high range, Finland)

We will return in more detail to the subject of safety as regards equipment.

- ❖ As regards the criteria of choice among motorists, there is no significant **difference between the countries**. The differences are subtle. Price is a fundamental criterion in all countries, but is an even more sensitive factor in Poland; the standing of the make also seems to have a greater import there.
- ❖ Rather than the national origin, it is the **type of motorists** that generated **the order of priorities**:
 - **Family customers and women** using a second car attach greater importance to the criteria of **space, capacity and safety**.
 - **Intensive drivers**, who own cars in the medium to high range and who drive more on motorways, give greater importance to performance levels.
 - **Low- to medium-range motorists** (whose vehicles are less well equipped) pay more attention to the equipment fitted as standard.

Conversely:

- Drivers basically buying a **second-hand vehicle** for its price – especially if they are young drivers and people only driving around within a city – can put the importance of safety equipment into perspective.

II.2 CRITERIA OF CHOICE FOR PROFESSIONAL CUSTOMERS

- ❖ The criteria for choice used by professional drivers and their priorities obviously differ from those of motorists:

- The **make** takes on a predominant importance, both on account of the intrinsic qualities of its products and on account of service and customer relationship aspects (sales policy, discount, after-sales service).
- **Solidity** and **durability** are fundamental. They also favour the choice of certain makes, especially Mercedes in Germany in the case of lorries and taxis.

“As a taxi Mercedes is the most resistant. I mean it is better for a 24/7 use” (Professional drivers, Germany)

“I wanted to stop changing vehicle every 2 years because we have a whole system aboard which you have to take apart and then put together again” (Professional drivers, France)

- Professional drivers view the **space** criterion in a totally different way from motorists, and this view varies according to the use to which the vehicle is put. Loading capacity tends to be more important for lorries, whilst passenger compartment and luggage space are prioritised in the case of taxis. Cabin capacity is sometimes mentioned by users of heavy goods vehicles.
- **Performance levels** do not really have any meaning for commercial vehicles, which should above all have loading capacity.
- Likewise, little importance is attached to **the aesthetic appearance** here (except for some taxi drivers on account of a positive reference to a brand image).
- For these customers **safety** takes on a special meaning to the extent that they travel large distances, in all weather, and assume responsibility for other road users (customers in taxis, children or adults transported in coaches, other motorists). The awareness of this responsibility is especially strong when the company has had the experience of an accident that can be traumatic for the fleet manager (an accident involving a school coach resulting in victims, for example).

The importance of safety is also a factor justifying the choice of a particular make.

- **Consumption** is one of the criteria taken into account to determine the cost. For all commercial vehicles, it relates back to the choice for diesel.
- **Comfort** is also cited in these target groups, even if it is not as important as for the target groups of motorists.

For fleet managers, it is with a view to an improvement in drivers' working conditions – which also responds to a concern for safety (comfort of the seats or the cabin).

For taxis, it is a commercial argument for customer comfort.

- ❖ Finally, it must be noted that the influence of **employee** drivers on the choice of their vehicle is very variable and often seems limited. It is the boss who chooses on the basis of criteria that are by and large economic, the vehicle being a working tool and a major investment.

“The ‘governor’ (boss) isn’t interested in our views beyond whether we’re comfortable enough and we’ve got a good radio. To be honest that’s all out of our hands” (Professional drivers, United Kingdom)

CHAPTER III:
GENERAL ATTITUDES TOWARDS
CAR SAFETY

III.1 PERCEPTION OF UNSAFE SITUATIONS

- ❖ **Generally speaking, motorists say that they feel safe driving.** It is even the general opinion that this is a condition *sine qua non* for being a **good driver**:

“Usually I feel secure when I drive. Otherwise I would be afraid and I would not drive” (Car owners – Low-medium range, Germany)

“I guess it’s such an everyday thing, driving, that I’ve stopped considering my vulnerability when I’m doing it. I don’t really think about it” (Car owners – Medium-high range, United Kingdom)

- ❖ This feeling refers both to the **high level of safety of modern vehicles** and to the **confidence that motorists have in their own ability** to drive (well). It can also play a part in the ability to hide certain inevitable risk factors so as to be mentally in a position to drive well. This is the case for example of owners of small cars who know that the size of their vehicle can potentially be a danger.

“I’m very aware when I’m driving my (Smart) car that if I crash it I’ll be in a lot of trouble” (Car owners – Low-medium range, United Kingdom)

- ❖ However, **some situations** are likely to create a **latent feeling of insecurity**, or are quite simply **anxiety-producing**. These situations are cited in all countries in a fairly homogenous manner.

Basically these are:

- **Poor weather conditions** – rain, fog, snow, black ice – which led to problems of **visibility** and **road holding** resulting in a fear of **losing control of the vehicle**.
- **Night driving** (especially harrowing for women, elderly people and more generally those who do not drive very much).
- The appearance of unforeseeable **obstacles** on the road (animals, for example).
- Conditions of **dense traffic**, particularly when there are many **lorries** and the negotiation of areas where **roadworks** are being carried out.
- Situations in which the **driver’s concentration lapses**, particularly those linked to fatigue (in Poland, motorists add situations of psychological stress). Using the telephone at the wheel is also reckoned to contribute to lack of attention.

More hypothetically, since fortunately it is only rare, the risk of **mechanical/technical failure** (brakes failing, tyre blow-out) is also cited. This is alarming on account of its unpredictability.

- ❖ Rather than between the countries, it is **between types of drivers** that **differences** can appear in the kind of anxiety-inducing situations:

- People with **dependants** say that they are more concerned when they have children in the car.
- **Women** and elderly people often fear night driving.

- The owners of low- to medium-range models say that they are more easily stressed in certain conditions than the owners of high-range models. This refers to the fact that the latter are often people who drive a lot, are confident of their reflexes and their ability to deal with all driving situations, and they feel that they have vehicles which are particularly advanced in the field of safety.

❖ For **professional drivers**, the **reactions** are **similar although with some differences**:

- Truckers – and fleet managers – tend to assert in all countries that they never feel that they lack safety. For them this is a way of affirming their status as “professionals” and replying to the latent preconceptions existing in their regard.

By way of justification they point to their considerable driving experience, their sense of responsibility, the safe nature of their vehicles (size, protective mass, and height of seat enabling the driver to control the whole traffic situation). Fleet managers generally say that they have confidence in the quality and conscientiousness of their drivers.

“You can see ahead and I like the feeling that you know what’s going on” (Professional drivers, United Kingdom)

Drivers are particularly inclined to minimise the risk of falling asleep at the wheel, by stressing the fact that break times are respected and checks are carried out (in the United Kingdom the tough EU rules and regulations are cited in this regard).

However, some admit that the pressure of professional life can constitute a potential danger and the feeling of being “the master of the road” can lead to risky behaviour.

“Because of the timetable we are always under pressure. A traffic jam can be quite stressing” (Professional drivers, Germany)

British drivers can feel less safe when they have to drive on the right on the Continent.

Like motorists, they mention weather conditions as a stress factor (Finnish truckers seem to fear the period at the beginning of the winter season) and they are particularly concerned about what they see as the irresponsible behaviour of other categories of road users: motorists failing to respect safety distances, motorcyclists appearing out of nowhere and riding too fast.

- Taxi drivers constitute the category least concerned by the feeling of insecurity, although they feel responsible for the safety of their passengers in addition to their own, but generally they feel that they have very well equipped and well maintained vehicles. Moreover, they tend to drive in urban areas. Like lorry drivers, it is chiefly the behaviour of the other road users (particularly children, pedestrians, cyclists riding against the traffic and crossing at points other than zebra crossings) that seem to them to create risk.

❖ For **driving instructors**, some set themselves apart on this subject by asserting with a degree of paradox that the safety of modern vehicles constitutes a risk in itself since it tends to take the edge off the sense of danger, especially among beginner drivers, who can tend to have a feeling of invulnerability (especially young men, who have a tendency to drive too fast). The comments made by **car salesmen**, meanwhile, do not add any extra information.

❖ The question of the perception of situations of insecurity **for other people** gives rise to answers on two levels:

- **Groups** of people, considered as a **danger** not only for themselves but also for others:
 - **Motorists** in the minds of lorry drivers, **lorry drivers** in the minds of motorists.

- Users of **two-wheeled vehicles** (cyclists in towns and cities, motorcyclists on the open road).
- **Pedestrians**, particularly elderly people and children (in France and Finland, roller skaters are included in this group).

“Sometimes you see children playing on the road. Once I even went over and told them not to play in the middle of the road and that I would come back and check if they obey me or not” (Car owners – Medium-high range, Finland)

- **Groups** of people deemed to be **at a disadvantage** in the modern traffic context (children, elderly people, owners of two-wheeled vehicles).

To sum up: all drivers tend to regard **others as potentially dangerous**.

- ❖ As can be imagined, **pedestrians** who **view themselves as the weak link** in the traffic chain feel especially threatened, as do cyclists (pedestrians often being alternatively pedestrians and cyclists). This is all the more so since they feel there are not enough zebra crossings, or that roads are poorly lit (Poland).

III.2 POTENTIAL FACTORS FOR IMPROVED SAFETY

- ❖ Generally speaking, and in all countries, motorists feel that increased safety is above all a function of **the development of motorists' behaviour** (less aggressiveness, less speeding, more assumption of responsibility) and **an improved context** (roads and rules).
- ❖ **The improvement of vehicles** is only mentioned on this subject very **marginally** (and more so by professional drivers).
- ❖ On the other hand, considerable mention is made of the **responsibility of the authorities on several levels**:
 - Maintenance of the roads network – or its improvement (particularly in Poland).
 - An improvement in road signs (here, too, an imperative demand made by Polish motorists) and the generalisation of roundabouts.
 - An improvement in the quality of motorists' driving, thanks to regular driving training courses and/or checks aimed at verifying the continued viability of the driver's skills (especially for older drivers). In some countries, interviewees even suggest improving the quality of driver instruction, or putting back the age at which one is allowed to drive (Poland, United Kingdom) or imposing certain limitations on young drivers.
 - A more effective control of offences with a view to education (especially speeding offences, observance of the safety distance, and – in the United Kingdom – driving without a licence).
- ❖ Finally it will be noted that in two countries (Finland and Germany) mention is made – in an isolated fashion – of an improvement in bodywork design with a view to limiting the physical damage caused to pedestrians in the event of a collision.
- ❖ Little is said about speed limits in this respect (apart from the request for the authorised speeds to be observed more closely). This refers to various situations: from France, where the speed limit on motorways is something that seems totally assimilated now (there is no question of this being called into question), to Germany, where motorists are very attached to their freedom in this respect.

CHAPTER IV:

KNOWLEDGE OF AND ATTITUDES

TOWARDS ON-BOARD

ACTIVE SAFETY SYSTEMS

IV.1 SPONTANEOUS PERCEPTIONS RELATING TO THESE SYSTEMS AND NOTIONS OF ACTIVE AND PASSIVE SAFETY

- ❖ It will be noted first of all that motorists consider safety and what contributes towards it in the car in a global manner, without making any distinction between:
 - **Active** or **passive** safety.
 - **Equipment** or **design** qualities (distortion zones).
 - Electronic **on-board** systems and **other** systems (seat belts, airbags).

As for the **distinction between active and passive safety**, we see in all the countries that these notions are (more or less) known by name, but that their **meaning** is by no means **unequivocal**. Everyone has a personal explanation for the terms, which only occasionally tallies with the correct definition. Thus some regard active safety as anything referring to a movement (deployment of the airbags) or anything calling for an action on the part of the driver (including the care and maintenance of the vehicle). In Finland, one participant even felt that colour was an element of active safety.

“Passive safety, you don’t have anything to do, it’s done for you. Active safety, you are the one to press the button” (Car owners. Low-medium range, France)

“Active safety is what you do voluntarily like fasten your seatbelt or stick to the speed limits, passive safety is the reaction of the car when you brake, ABS, airbag, what happens automatically” (Pedestrians, France)

“Active safety refers to what I can do to keep my car in full efficiency: check tyre pressure, do regular servicing” (Car owners. Low-medium range, Italy)

“Active safety is something we are responsible for and passive safety is anything the car comes equipped with. Passive safety depends on whether the car has seat belts, good tyres, power steering whereas active safety depends on how we fasten those seat belts. It’s the safety that’s up to us” (Car owners. Low-medium range, Poland)

- ❖ **Professionals** (drivers and fleet managers) only occasionally seem better informed than motorists on this point.

“The passive systems exist but do hopefully not have to be used. Active is in use all the time” (Professional drivers, Finland)

- ❖ The situation is more mixed among **potential opinion formers**.

Knowledge of these concepts is only partial among car salesmen – although better, it seems, in Germany. This is also true of driving instructors: clear perception of those who were interviewed in Germany and Finland, vague in the United Kingdom, irregular elsewhere.

- ❖ The **pedestrians** questioned for the most part have a very poor knowledge of the meaning of active or passive safety.
- ❖ Although no country sets itself apart on account of a good understanding of these notions, the confusion seems most widespread in the United Kingdom, where the very terms active and passive safety were unknown to most people, in the case of both private individuals and professionals.

- ❖ Despite the lack of structuring of the elements helping to bring about vehicle safety, motorists' attitudes are unanimously positive towards all equipment liable to save lives (the opposite would have been surprising). But at the same time, there is also unanimity in stressing the very good level of modern vehicles in this respect – which could indicate that **beyond the stereotype, there is scarcely any active demand for improvements**. Moreover, we saw above that safety equipment is rarely a factor when it comes to choosing between one model and another, since all are reckoned to be more or less equivalent on this point.

- ❖ Emphasis should be placed here on the **absolutely imperative nature of safety in the comments** made by motorists, who regard it as a **right** and do not tolerate the idea that it might be reserved for the most well off. This leads to a criticism of the policy of manufacturers who begin by fitting safety equipment on top-of-the-range models. Motorists feel that safety equipment should be fitted as standard from low-range models upwards. What is more, they see such a trend emerging with reference to what is being done with the ABS and airbags, especially in Germany – a pioneer market in this field. It will moreover be noted in this country that the ADAC, an automobile club that lobbies on behalf of motorists, is currently arguing for ESP to be fitted as standard on **all** vehicles.

- ❖ Across all the countries, two types of equipment repeatedly fuel people's comments and should be considered as indispensable: ABS and airbags.

The emblematic character of these items of equipment stems from the way they have been distributed (initially the exclusive right of top-of-the-range models, then available as optional extras, and now often fitted as standard on all vehicles). They are emblematic to the point of possible excess. The airbag, for example, which was initially for the driver, then the front-seat passenger, and then the rear-seat passengers, is now found in profusion, to the point – at times – of being laughable (a question of who has the most).

- ❖ This subject leads to **some critical reactions in relation to safety equipment** being cited, which refer in motorists' minds to **pernicious effects** or **abuses**:
 - A feeling of there being a **flood** of equipment that adds to the price of the car and may make the purchaser think twice about its genuine usefulness (some items of equipment only seem to have any purpose for very specific kinds of motorists).
 - The fear of the **fragility** of **electronics** that acts at two levels – firstly in total contradiction to the promise of safety offered by these items of equipment, then by causing the motorist to worry about possible high repair costs.
 - A possible **conflict** with **driving pleasure**, when it comes to equipment having a direct effect on the way one drives.

- We will come back to these hindrances during the analysis of attitudes to various types of equipment.

- ❖ As regards the **level of knowledge of on-board equipment** and motorists' **understanding of the way it works**, it will be noted that:
 - **ABS** and **airbags** are cited here **almost unanimously** in all the countries and categories of interviewees (with the exception of the United Kingdom).

It was already stated above that these are two systems currently considered as an established right. In both cases, people are relatively aware of how they work even if, for ABS, some inaccuracies or errors may register in people's minds (for example some think that it shortens the braking distance, but everyone knows about the anti-blocking effect of the wheels and the fact that steerability is maintained).

- **ESP is poised to acquire the same status as a leading item of equipment.** This is already the case in Germany and Finland, but is less obvious in the other countries, particularly in the United Kingdom and Poland where only the most well-informed motorists (generally men) mention it.

For ESP, however, there is a **low level of understanding of how it works**; it is the benefit – maintaining one's trajectory – that is perceived and valued. Unlike ABS – whose designation is unique – that of ESP varies (ETC? ETS? VCR?) and there may be doubts and confusion with systems about which those who talk about them wonder whether they fall under the same principle (ASR?).

- Motorists from the different countries do mention a large number of **other** items of **equipment**, but these are only cited by a few people in each category.

Mention will be made here by way of example (without any hierarchical value) of:

- All systems aimed at maintaining **steerability** (ASR...).
- **Radar** and **camera** systems (assisted parking, warning about failure to respect the safety distance, removal of the blind spot).
- Tyre pressure monitoring systems – and “run flat” tyres.
- Self-directing **headlights**, new types of **lighting** (xenon).
- **Heated** windscreens.
- **GPS** (not directly associated with the notion of safety).
- And very marginally, the warning system for crossing lines.

- ❖ **Professionals in the driving business** – drivers and their managers – do not specifically set themselves apart from motorists on this point, if only to the extent that knowledge of ABS and ESP in this group is total.
- ❖ Among possible opinion formers, **driving instructors** have a very mixed level of knowledge. Moreover, among them frequent reservations are voiced about these items of equipment, since they fear that they give motorists, especially beginners, a feeling of invulnerability which is potentially dangerous.
- ❖ On the other hand, **salesmen** are generally well informed, especially when they are selling high-range makes (Audi, Mercedes and BMW).
- ❖ As could be expected, **pedestrians** only have a limited idea of on-board safety systems. However, they are generally also familiar with ABS and airbags in all the countries.

IV.2 OWNERSHIP OF SUCH SYSTEMS, REASONS FOR ADOPTING THEM AND POTENTIAL IMPORTANCE FOR THE FUTURE

- ❖ The degree to which **vehicles are equipped with safety systems** varies according to the country, the level of range and the quality of the vehicle (new or second hand):

- Almost all vehicles in the medium to high range, a majority of vehicles in the low to medium range, and all vehicles that were bought **new**, were fitted with ABS and airbags.

This is especially the case in Germany (where only two owners of vehicles in the medium to high range purchased second hand did not have ABS), Italy and Finland.

Conversely in the United Kingdom, motorists even seem to have difficulty identifying the equipment fitted in their car (albeit apart from ABS, which thus confirms its character as a leading item of equipment).

“To be honest, other than ABS I can’t think what active safety would cover. So I don’t know”
(Car owners – Low-medium range, United Kingdom)

In Poland, only ABS is mentioned significantly, here, too, as standard.

It will be noted that in almost all cases these items of equipment had been acquired with the vehicle in which they were fitted **as standard** or offered as a free optional extra during a promotional offer.

Therefore, they had not played a decisive role in the purchase: the customer acquires the equipment fitted on the model he has chosen. It is more the **wealth** of the equipment (in the broad sense – comfort **and** safety) that is an important criterion in choosing between several models.

The exception to this rule is the case of some people having had a specific problem that prompted them to make a particular request (for example an owner of a BMW in Italy who had had a problem attributed to the rear-wheel drive and who absolutely wanted ESP on his new vehicle).

- ❖ It is therefore confirmed that **the subject of safety equipment does not play a major role in the negotiations at the time the choice is made**. This opinion is moreover expressed both by motorists and by salesmen:

- Motorists say that salesmen point out that certain items of equipment **are fitted**, rather than explaining the **benefit** of these, and tend to concentrate more on accessories designed to heighten comfort during their sales pitch.

“Car dealers tend to focus on air-conditioner, interior level of finishing, design, performances... rather than safety, commonly they underline that ABS is included in the price of the car, no extra charge” (Car owners. Low-medium range, Italy)

- Salesmen often feel that customers are not really interested in the subject or are only interested in a very superficial way – to ensure that some of the items of equipment are indeed fitted – without this really influencing their decision. Above all, they stress that motorists are not **prepared to pay extra** for this equipment.

There are apparently only a few exceptions linked to very specific types of motorist who have safety as one of their uppermost concerns (family customers, especially women).

❖ Aside from the inevitable ABS, **possession** of the other **electronic safety systems** varies markedly from country to country and between the two segments. They are mainly cited by the owners of models in the mid to high range:

- Frequently:
 - ESP (the most frequent), or ASR or similar systems (in particular in Germany)
 - GPS, when it is considered as a positive contribution to safety
- Marginally in each country (only a few people per country):
 - Assisted parking or anti-collision radars
 - Alarms denoting speeding or speed adjusters
 - Adaptive headlights

❖ Here, too, we see motorists tending to refuse to consider safety in terms of **specific items of equipment**, but rather to think of the safety of their vehicle **as a whole**.

“I think that’s the first time I’ve thought about the safety systems in my car” (Car owners – Low-medium range, United Kingdom)

❖ **Professional users** all have vehicles equipped with ABS and often ESP or ASR. They are generally well informed about the way these systems work (in Germany, the fleet managers had received targeted information on these systems from manufacturers, on the occasion of trade fairs or commercial relations).

Some lorries are also fitted with additional systems, which contribute to safety, for example the de-icing system, line-crossing sensors, assisted or reinforced braking systems, and the emergency call system.

Professionals often make it a point of honour to assert that these systems are a plus, but that the drivers’ driving qualities remain decisive for safety and that they could do without them.

For some, the concern for safety can be the reason for choosing a particular make (Mercedes), which removes the obligation of checking the equipment in detail.

“To be honest I’m not sure what’s on the Mercedes vans, I just assumed they’re good vans, probably got ABS. It’s not something I’ve looked into really” (Fleet managers, United Kingdom)

❖ **Driving instructors** express two opinions here:

- They think that their pupils are often poorly informed of safety systems and that this is certainly not a priority element in the choice of their car.

Moreover, pupils are often young people whose first car will be bought second hand after they have obtained their licence – without any real possibility of choice.

- Some feel that the sophistication of modern equipment is such that the average motorist does not understand it and – more seriously – does not know how to use it properly (for example ABS which requires a certain braking “technique” in order to be wholly effective).

- ❖ **For the future**, there is healthy unanimity in all the countries (with the exception of the United Kingdom and Poland, which are still overall more reluctant¹) and in all the target groups in thinking that **the importance of safety systems will grow**.

However, one should not misunderstand **the meaning of this assertion**:

- It means that motorists expect these systems to be improved and to become more generalised, and not to be reserved for high-range models.
- It does **not mean that they will be prepared to buy these items of equipment as optional extras**.
- ❖ The right to safety demanded by motorists of all countries will be recalled here. In this respect, they think that any item of equipment contributing decisively to safety and useful for all motorists should be fitted as standard in all vehicles, or become a legal obligation along the same lines as seat belts.

This is no doubt both an argument of a moral order and a means of “kicking the matter into touch” whilst waiting for these systems to become standard and without envisaging taking the initiative oneself.

These notions of **real** effectiveness and **general** usefulness are entirely decisive and will play a decisive part in the evaluation of the various safety systems.

- ❖ Motorists think that the trend towards democratisation of equipment will be favoured by the strong competition prevailing in the car market.

“When I get my new car in 5-10-15 years, it will be a criterion, they will all be fitted because the Japanese have already started in that line” (Car owners – Low-medium range, France)

“In the future it will be fitted on all vehicles. That was the same with the airbags and the ESP, it is already optional on little cars, tomorrow it will be standard” (Car owners – Low-medium range, Germany)

In Poland, where motorists seem more reluctant about these items of equipment, we see that it is rather a change in their status that could increase their appeal. They would have to become signs of standing, for example.

- ❖ **Professional drivers** and **fleet managers** declare their willingness always to keep up with the latest developments where safety is concerned – albeit again commenting that other factors than equipment play their part here (in particular the regular servicing of the vehicles).
- ❖ **Salesmen** think that these systems could become more important, whilst remarking that the increase in their number and their degree of sophistication tend to surpass the customers’ capacity of understanding. Some think that financial incentive systems should be established to increase the attractiveness of these accessories.
- ❖ Many **driving instructors** reiterate their reservations, although they think that these items of equipment will grow.

¹ In the United Kingdom, it is because the more emotive dimensions in the choice of a car apparently have to remain the priority ones. In Poland, it is more a problem of the costs of this equipment and mistrust as regards the reliability of electronics.

CHAPTER V:

ATTITUDES TOWARDS DIFFERENT

ELECTRONIC ON-BOARD

CAR SAFETY SYSTEMS

- ❖ The people questioned were asked to express their opinion on 10 car safety systems “already existing or which should be developed shortly”, with a brief description given of each one’s function.

A- ABS – Anti-blocking system

A system that electronically adjusts braking intensity so that the wheels continue to turn, enabling the driver to keep steering control.

- ❖ We have already said how much this equipment is now well established in people’s minds. It is the piece of equipment that most people have and the one which is most envisaged for the future when motorists do not yet have it.
- ❖ The system and the way it works are widely known in all the countries.
- ❖ ABS is the typical example of a safety system which is supposed to be **effective** and **useful** for almost **all motorists**, everyone possibly having the need to brake suddenly with a major risk of wheel blocking and loss of control of the vehicle. ABS has become a new standard in brake operation. It is already fitted as standard on many vehicles at all levels of the range. For **professional users**, it is as much a part of the basic equipment if not more so.
- ❖ However, it will be noted here, in reporting the comments made by some driving instructors, that ABS can give a deceptive feeling of safety and that people sometimes misunderstand its benefit (shortening of the braking distance), which clearly illustrates the complexity of the understanding of these systems – and their good management – by drivers. In this respect, ABS could prompt carelessness. Some motorists make comments of this kind.

“This safety measure could be dangerous. Anyone can be under the illusion that he can stick to the car in front. This could have perverted effects” (Car owners – Low-medium range, France)

- ❖ Salesmen comment that this equipment is currently considered as standard to such a degree that it is not its presence that constitutes an advantage but its **absence** that would be **damning** in the sales argument.

B- ESP – Electronic Stability Program

A system that helps to stabilise the vehicle and prevent skidding when cornering or driving off, through active brake intervention on one or several wheels and intelligent torque management

- ❖ **After ABS, ESP** constitutes **the safety system of which most people are aware**, although this varies **from one country to another**, the names may differ according to the manufacturers, and the **understanding of the principle of how it works is often uncertain**. In any case those who are familiar with it know what its benefit is: ensuring the vehicle’s stability in critical situations.

It is in Germany that this item of equipment is most widely known (the ADAC is arguing for it to be fitted as standard on all vehicles there) – then in Italy. Familiarity with it is less generalised among French, Finnish and Polish motorists (it is mainly owners of mid- to high-range vehicles who have heard of it) and less still among their British counterparts. Among professional drivers and fleet managers, familiarity with this system is greater and more homogenous.

- ❖ **Interest** in ESP is shown to a **considerable degree among motorists** even if **the desire for its fitting to be generalised** to all vehicles is expressed **more unequally**: very strongly in Germany and Italy, with less enthusiasm in France, Finland and Poland (fear among owners of low- to medium range vehicles in this latter country of there being too great an impact on the price, and undoubtedly also specific mistrust already indicated as regards the reliability of electronic equipment). In the United Kingdom, the vagueness of perceptions of the principle of the system means that infatuation is currently more limited.

- ❖ When respondents define the significance of ESP, it is to associate it preferentially with **extreme driving situations**, linked either to the conditions found on the road (likely to concern intensive drivers to a greater degree, and less so those whose driving is essentially in urban or suburban areas), or the style of driving (fast, sporty).

“If you don’t make any excess, you don’t really need it” (Car owners – Medium-high range, France)

Some people even imagine **pernicious effects**.

“Maybe it will be an incentive for people to act even more like morons” (Car owners – Medium-high range, France)

- ❖ **Potential opinion formers**, who are **generally favourably disposed**, themselves sometimes voice this kind of **reservation** – including in Germany, moreover, where their views do not go as far as the very positive attitudes of customers: the system is effective but can lead to a dangerous over-estimation of one’s abilities.

“The ESP does not allow you to take a bend at 100 as some people believe” (Car salesmen, Germany)

- ❖ **Professional users** show themselves to be generally **very favourable** – even if occasionally we hear concerns of the same kind about the deceptive feeling of safety that this system can give (a comment made by some fleet managers), and if some lorry drivers claim that trailers not being fitted with it constitutes a limit to its effectiveness.

C- Adaptive headlights

A system that controls headlights to ensure optimum illumination of the road in bends. The system directs headlights into the bend. It can also automatically provide reduction of the glare to upcoming vehicles.

- ❖ This equipment is subject to a very **diverse appraisal** according to the country and the categories of user:
 - The importance of the system is seen first of all in the **increased visibility it gives on winding roads**.
 - A particularly positive attitude towards it is shown in France, where it is associated with the make Citroen (historic – DS – and more recent models): owners of cars in the medium to high range who are intensive drivers state their interest in it.

- There is a relative lack of interest in it in Germany, where it appears reserved solely for motorists who drive a lot on A roads and in rural areas (rather than motorways). Likewise, in Finland and the United Kingdom, interest in it seems reserved exclusively for driving outside built-up areas and we see that motorists have difficulty grasping its benefit. In Italy and Poland, owners of medium- to high-range cars or intensive drivers show a degree of interest.
- ❖ Overall, we see that the **anti-dazzle** effect of this equipment is over-valued in relation to the illumination effect for which xenon headlights (which some associate it with, in France in particular) seem more effective.
- ❖ Finally, it is a system which, whilst not generating a categorical rejection, does not manage to attract any great enthusiasm among drivers as to the idea of having it fitted (with the exception of France). It seems **reserved for motorists driving at night on small, winding roads in rural areas**.
- ❖ Interest is barely more marked among professional drivers. It is always conditioned by driving on winding country roads.
- ❖ For these reasons, adaptive headlights are the typical example of equipment which buyers are **for the most part not prepared to pay for**.
- ❖ Potential opinion formers also show themselves to have a lukewarm interest in the subject.

D- Speed alert

A system that alerts the driver when the speed exceeds the limit set by the driver or the legal fixed speed limit on any road section

- ❖ This equipment is **widely rejected** in all categories of interviewees and in all countries.
- ❖ The **reasons are wide ranging**. First of all, the interviewees perceive it less as a safety system and more as a guarantee against committing an offence.
Secondly, the information offered already seems available – since it is displayed on the speedometer or on the speed regulator, which has the added advantage of maintaining the speed constant.
- ❖ This system raises **questions as to the principle of its operation**, which is also to some degree called into question:
 - Who or what controls the speed?
 - If it is the driver himself, it is very restricting, since the speed limit often changes, both in urban areas and on main roads and motorways.
 - If it is an external signal, this can be interesting since it is easy not to see that the speed limit has changed – but that calls for an infrastructure which seems not to have been installed yet.
 - How does the system manifest itself?

- Bearing in mind the frequent changes, this system revives in particular the spectre of the car that “beeps” all the time.

➤ Does the system also brake the car?

For some, this would be the only interest (in Germany, some also talk of a Mercedes system going in this direction). For most, it is an apocalyptic vision and it is reckoned that this would create more accidents than it would prevent.

- ❖ Finally, **most users** – private individuals and professionals – do not see **any point** in having this equipment, which they would hasten to disconnect (something which the few motorists or professional drivers who claim they are equipped with the system say they do).

“I had it. The problem is that since it keeps ringing as long as you are above the speed limit you disconnect it” (Professional drivers, France)

“It’s just not necessary and that’s potentially irritating. I would just disconnect it straight away. It would be like having the wife sat next to me pointing out I’m going too fast!” (Professional drivers, United Kingdom)

- ❖ Finally – and this is the **major obstacle** –, this item of equipment is considered as having an intolerable **influence on the motorist’s free will**. It seems pointlessly moralising and guilt-inducing. This aspect is disparaged in particular in Poland.

“I happen to drive faster than the speed limit now and again. I would feel guilty most of the time” (Professional drivers, Germany)

“I hate that idea. It’s so controlling. Next thing will be something that actually slows your car down when you’re driving too fast. I find the whole idea too constraining” (Car owners – Medium-high range, United Kingdom)

“Personally, I can’t stand them. I’d be surprised if this innovation survives in this country. It’s a bit Nanny State, telling you off all the time because you’ve gone too fast. If you’re a good driver you know what speed you’re doing and I like to be in control of that, thank you very much” (Fleet managers, United Kingdom)

“No, no, thank you” (Car owners – Low-medium range, Poland)

- ❖ The same scepticism can be noted among many of the **potential opinion formers**.

E- Driver condition motoring

A system that monitors the condition of the driver and warns against drowsiness, distraction and inattention

- ❖ This system – little known, except by some professionals and some Finnish motorists – intrigues people as to **the way it works**, which also raises **question marks** as to its reliability.
- ❖ Its usefulness is immediately seen by **motorists regularly undertaking long journeys at night**, bearing in mind the potential danger of falling asleep at the wheel. In this respect, this system is felt to be very important for improved road safety. However, not everyone is entirely convinced by the idea:

- There is near unanimity among motorists in considering that this equipment should be fitted on lorries and coaches and should be a legal obligation, but motorists are more reluctant for themselves.
- A number of them feel that it is the driver's responsibility to desist from driving if he is tired, or to force himself to take breaks – so this system would be superfluous.

*“It's up to the driver to decide for himself to stop driving if he feels that he is falling asleep”
(Professional drivers, France)*

- Others are of the view that this system stifles the driver's freedom and reject it on this account. This reaction is particularly marked in the United Kingdom and Poland, and is generally found among people who do not have occasion to drive **regularly** at night and more so among low- to medium-range motorists.

In addition to the pointlessness of the system, they tend to rationalise their rejection by voicing doubts as to its reliability.

- **Some motorists**, on the other hand, claim to be **very interested** in this item of equipment:
 - Because they drive a lot and also drive at night.
 - Because they are aware that suddenly falling asleep (which has a name in Germany: “*Sekundenschlaf*”) can even happen to a responsible driver, which makes them consider this accessory **not as a curb** on their free will **but as an aid** in avoiding an incident **beyond their control**.

- ❖ Reactions to this system are not very different among **professional drivers**. Overall, drivers and fleet managers are in favour of it in all the countries, even if they owe it to their image of responsible lorry drivers to say that they observe the legal breaks and are not really threatened, but they always imagine that **other** drivers do not have their scruples.

“It's important, especially because a lot of drivers disregard their physiological needs and a lot of customers-tourist agencies try to force the drivers to drive non stop” (Fleet managers, Poland)

Taxi drivers are generally less interested since they do not do much long-distance driving at night.

- ❖ **Potential opinion formers** show themselves to have mixed views, the nature of their reactions not differing from that of users. In any case, there are few who see it as being useful in a general and preferential manner.

F- Lane departure warning

A system that gives a warning to the driver in order to avoid leaving the lane unintentionally, using such technologies as video image processing

- ❖ Some people know about this system in France, where it is associated with the make Citroen, but the device is practically unknown in the other countries.
- ❖ This is the characteristic example of a **conflicting item of equipment** and one that **does not arouse any great desire among drivers to have it fitted in their car**, irrespective of the country and the type of user:

- Its **usefulness** is **questioned** in a normal driving situation and people wonder what it really contributes, to the extent that one is often obliged to change lane (in town for example). Questions are asked about the triggering factor: is this overtaking without indicating? In that case, it would be an unseemly intervention in the driver's free will:
 - "I cross the line when and if I feel like it" (Car owners – Medium-high range, France)*
 - "That's part of the Highway Code. It goes too far in supporting people, they start feeling less responsible for themselves" (Fleet managers, France)*
 - "At that rate, with all these safety devices we won't be able to make any decision ourselves any more" (Car owners – Medium-high range, Germany)*

- If it is a question of drawing attention to the driver crossing the line, the systems of "spikes" used on certain roads or in areas where works are being carried out seem to do **the same job** at a lower cost (mentioned spontaneously in France, the United Kingdom and Poland).
 - "This type of systems starts to be introduced in Poland, they are made this way, that a line on the road is painted with a special kind of paint, which permits to hear a loud noise, when the car is driving on this line. I would say that it makes sense, especially according to the last device. (...) this is a shot of adrenaline that you start losing control and it gives you a sign that you should rest" (Fleet managers, Poland)*

- ❖ This system tends to be considered as **the archetypal sound signal: repetitive, annoying and pointless** (because you no longer pay heed to it or you disconnect it), which could even be dangerous.
 - "For me it doesn't make sense. I prefer when it doesn't beep. I don't want it because it beeps all the time in my car, that seatbelts are undone and it irritates" (Car owners. Low-medium range, Poland)*

In France, where the system is better known, there are even negative opinions as to its operation, with reference to the specific experience of vehicles in which it is fitted:

 - "It vibrates under the driver's seat when you cross a line. People complain because of the vibrations going too fast and they are disturbing when you overtake" (Professional drivers, France)*

- ❖ However, and this is interesting, in comparison with the processes coming into play in the mechanisms of appeal and rejection, this system can gain in appeal when it is perceived as an alarm alerting the driver to a reduction in his level of concentration, with a benefit comparable to the equipment dealt with above. In this case, it is therefore considered as a **sub-system for the monitoring of the driver's state of alertness** – in a less effective version and at the same time reserved for lorry and coach drivers.

- ❖ The attitudes of **professional users** scarcely differ. Those of **potential opinion formers** are generally (at least) lukewarm – some salesmen seeing them as a possible sales argument.

G- Obstacle and collision warning

A system which detects obstacles, including other vehicles, and gives warnings when collision is imminent based on such technologies as radar and video image processing

- ❖ This system gives rise to **numerous conjectures** as to the exact way it works, the type of obstacles concerned, and the moment the device is triggered.
- ❖ For many it is assimilated to reversing radar – equipment which is quite widely known and generally viewed in positive terms – but a sense more strongly concentrated on the avoidance of a collision is more **problematic**:
 - At what **distance** does it trigger? Is there still time to avoid the accident? (The term “imminent collision” used in the definition could lead one to suppose that it would be too late).
 - Does that refer to **observance of the safety distance**? What of it, then, when other motorists come rushing up?
 - Does it **brake** the car (it seems that Mercedes is currently experimenting with a system of this kind)? If that is the case, what becomes of free will and the danger caused to or by other users (risk of crashing into the vehicle by sharply braking)?
 - Isn't there a **risk of repeated alarms** (every time an object or a car approaches the vehicle)?
 - What is the real benefit in relation to what the motorist **sees**?
- ❖ Interest in this system seems basically concentrated on **obstacles that cannot be seen** (more so to the rear, small obstacles – a block or a child behind the vehicle), which again makes it comparable to the reversing radar.

Beyond this, **a certain interest in principle** is displayed among motorists who imagine themselves in situations in which it is **impossible for them to see or make out obstacles** that can appear in front of them: a traffic jam after a bend, a pedestrian or an animal unexpectedly crossing the road, in particular at night or in fog.

However, it is **rarely** reflected in an **active desire to have such a device fitted**, since this is often perceived as undoubtedly potentially useful but not essential, and could moreover appear too “futuristic”.

The attitudes of **professional users** are quite similar.

This equipment again fuels general reservations that can be entertained in respect of these systems.

“We’re entering the realms of too many gadgets now. What worries me is that having all these devices means the driver loses responsibility, and that may not be right. It’s actually making driving more dangerous in my view” (Car owners – Medium-high range, United Kingdom)

- ❖ As for the **potential opinion formers**, some car salesmen show a degree of interest, whilst driving instructors seem for the most part half-hearted or sceptical. As among private or professional customers, the uncertainties prevailing over the operating principle and the way in which the system is triggered make the adoption of clear positions on the matter difficult.

H- Local danger warning

A system that detects a wide range of hazards and gives real time information on such hazards as bad weather conditions, oncoming vehicles, accidents and pile-ups ahead

I- RTTI – Real time Travel and Traffic Information

A system giving real time information to the driver on traffic congestion and weather conditions, for preparing to cope with the situation ahead or choosing an alternative more effective route

- ❖ We will look at these two devices together, since they were **spontaneously associated** by most of the interviewees – the short definitions proposed barely enabling any distinction to be made between them.
- ❖ They are the subject of a **certain misunderstanding**:
 - They are **not** perceived as new items of equipment but as **new GPS functions**. In this respect, they are known on mature markets in terms of equipment (Germany and Finland in particular).
 - GPS is currently a leading item of equipment which many drivers, essentially among intensive drivers and owners of medium-high range models, are keen to have. The interest in GPS stems from the fact that it offers both comfort (stress-free driving since the worry about orientation is removed) and safety (you no longer have to check your route by consulting maps to the detriment of your concentration). Its appeal therefore refers to these systems.

“Before, when I used to drive with the map on the steering wheel, without watching the road...” (Car owners – Medium-high range, France)
 - Conversely, if they were proposed **on their own**, they would appear to **do the same job as GPS** (for some, this kind of service can also be provided by mobile phone operators), and would therefore risk being superfluous.
- ❖ In the sense of a new-generation navigation system, this equipment – with ancillary functions associated to those of the next one – seems very attractive for all **intensive drivers** who have to travel in areas they do not know, including professional drivers. On the other hand, it seems pointless for people who use the car in urban areas which they know, and there are many such people among the owners of low- to medium-range vehicles.
- ❖ In Finland, in particular, remarks are heard that this system calls for an exterior infrastructure which does not yet exist (although one participant had a car equipped with a navigation system providing these functions).
- ❖ The usefulness of this system would be heavily dependent on the **quality** of the information provided. Indeed, the radio gives information on the traffic situation but it is not in **real time**. The possibility of obtaining a **diversion route** often appears to be the system’s main benefit. These two characteristics – perfectly up-to-date information and proposals for diversions – are absolutely imperative in justifying the usefulness of this system.

- ❖ No major differences were seen between the reactions of the motorists who met in the groups and those of the **professional users** of vehicles. The understanding of the benefits of the system is overall the same. Undoubtedly the specific interest appears more developed among lorry drivers who travel long distances on main roads or motorways, and among their fleet managers. The main advantage for them is also the possibility of anticipating tailbacks or traffic problems by being able to take an alternative route fairly early on, and avoid wasting time (this having an economic impact for them, moreover). Reservations relate to the assumed high cost of these future systems, or the current absence of infrastructures (a fact underlined in particular by some Finns who sometimes mention areas that are equipped in other European countries, including Germany).
- ❖ Among the **potential opinion formers**, car salesmen often see it as a particularly useful system – but they also view it as a device based on GPS or coupled to it, giving it an added sophistication. The driving instructors’ reactions are less homogenous (and less involved).

J- E-call

A system that automatically gives precise coordinates of the location of an accident to the emergency services

- ❖ After a brief reflection – some people sometimes felt that this equipment was doing the same job as the mobile phone – **all** the interviewees in **all** the countries agreed that this equipment was **indispensable**, since it was obviously a device that could save lives.

“We all have a mobile phone, but what use is it when you are wounded and can’t use it” (Car owners – Medium-high range, Germany)

- ❖ Interest in this system even had one thinking that it would be liable to become a “must”, along the lines of the airbag, as an emergency services system that it is **reassuring** to have, even if you hope you will never have to use it.

“It’s one of those things that you don’t particularly want to use but it’s nice to know it’s there!” (Car salesmen- United Kingdom)

- ❖ We can see that apart from the United Kingdom, where this problem was raised by one person, and Poland where it was mentioned by a few others, this equipment was **never perceived as a stifling of the driver’s freedom**:

It will be recalled here that these two countries seem particularly attached to the inviolability of individual freedom, the United Kingdom by cultural attachment, Poland for having been more recently liberated from the constraints of a totalitarian state.

“I don’t like the idea of being tracked at all times. Who will be tracking me too? It’s all a bit Big Brother for my liking” (Professional drivers, United Kingdom)

That does not mean that the question of the compatibility of such a system with the protection of personal data is not liable one day to public debate if campaigns were developed in this direction by opponents – but at least this is barely present in people’s minds at the moment. We can think that the benefit, which is perceived as very real, will weigh more heavily in the balance in the face of any opposition.

K- Assessment of the interest shown in the different systems

❖ Aside from a few differences existing between the various countries and between the types of users, we can draw a few conclusions from the analysis of the reactions to these systems which are valid for all and symptomatic of the **deep-seated** and **genuine** attitudes to them:

- **Some safety systems** are amply consensual, i.e. their **usefulness** is **unanimously recognised** and they are poised to become safety **standards**.

In this respect, motorists feel that they are of interest to **all** kinds of motorist and that they should be fitted **as standard features** on all vehicles, or even their fitting should be made **legally compulsory**. This basically concerns **ABS** and **ESP** (support for ESP is not so massive, but quite clearly this item of equipment is probably destined to be the subject of the same infatuation as ABS in a relatively short time frame).

Interestingly, **the electronic emergency alarm**, the principle of which is still not very well known, seems destined to come into favour in an identical fashion.

- **Other systems** seem to constitute a contribution to vehicle safety, it is true, but **do not seem to address all types of motorist in the same way**, since they relate to specific driving conditions (in particular night driving).

In this case, motorists regard it as **pointless to have all vehicles fitted with such systems** and are of the view that it is preferable to leave these as optional extras, at the free choice of those who feel they are concerned. This demand refers to reluctance in the face of the increasingly large number of on-board electronic systems that are supposed both **to increase the price of the car** and imply risks of **malfunctioning**, sources of inconvenience and costs.

The discriminating criteria here are often the mileage clocked up and the range level linked to it – drivers in the medium to high range, who are often intensive drivers using motorways, being more favourable to them than those of the low to medium range who tend more to be average drivers using their car in urban and suburban areas.

“I don’t think my journeys to and from work and to the shops really require a car equipped with thousands of pounds worth of safety features. It seems somewhat ridiculous” (Car owners – Low-medium range, United Kingdom)

In this second category we find the systems for **monitoring of the driver’s state of alertness** (which drivers consider as very important for professional drivers and especially for coach drivers), **alarms warning of hazards in the area through which the driver is driving**, the **real-time information and navigation system**, and **adaptive headlights**. The alarm system alerting of risks of collision is still perceived more ambiguously.

- Finally, **other systems** seem to be of **debatable interest**, or are **rejected** quite categorically. The typical example of this is the **system preventing the driver from crossing the white line**, which only seems to be of any use if it is regarded as a guard against loss of concentration, and **the alarm indicating that the driver has exceeded the speed limit**.
- Apart from the costs and any reliability problems mentioned above, we also find the reasons **for rejection** of these items of equipment to include **fear of a removal of responsibility** which is potentially dangerous for motorists and a curb on one’s free will:

“I think ABS and EPS are clearly important because they account for driving in poor weather conditions which is something you can't really control. What worries me is relying on a lots of bleeps and buzzers to tell me I'm driving too fast, that I should wake up and that I'm crossing the white line. As a responsible driver I should be aware of all of these things, and I don't want that responsibility taken away from me. Its actively dangerous” (Car owners – Medium-high range, United Kingdom)

CHAPTER VI:
SOURCES OF INFORMATION
AND PURCHASE STIMULI

VI.1 SOURCES OF INFORMATION DEEMED TO BE USEFUL AND CREDIBLE

❖ Irrespective of the country considered, there are **several channels of information that are particularly valued** by **motorists** for issues relating to the car in general and safety in particular:

- **The specialist media** (automobile press, television programmes).
- **The Internet** (including car manufacturer's websites).
- **Word of mouth**, exchanges of experience with friends, parents and colleagues. It can be thought that word of mouth is an absolutely fundamental support for the formation of opinions on this or that system.

In the same way, **professional drivers** almost unanimously mention **the media** first and foremost – in particular the specialist press and the Internet. **Word of mouth** also plays a role, essentially between colleagues (taxi drivers and deliverymen).

❖ The **other sources of information** suggested to the participants differ from each other considerably in terms of competence and credibility:

- The **public bodies** seem **liable to take part in the debate** either via regulatory provisions, or through information and awareness-raising campaigns, for which they have the necessary resources. But it would appear that their action has to remain at this **general level** (of the order of the anti-speeding campaigns in France and drink-driving campaigns in Italy).

The action taken by the public authorities is also decisive for the maintenance of the roads network which was, it should be recalled, one of the factors for improved car safety mentioned most spontaneously in all the countries.

Finally, the public authorities are expected to set in place and ensure observance of the legislation aimed at increasing safety (speed limit, respecting the distance from the vehicle in front, etc.).

Polish and Italian motorists reveal themselves to be highly sceptical of the action taken by the public authorities, towards whom they seem to harbour an endemic mistrust.

This view of the possible action of the public authorities is common to motorists and any driving professionals (drivers and opinion formers).

- **Car manufacturers** are considered as **a competent and credible source** but obviously limited to the systems they offer on their own vehicles. Moreover, they are not necessarily the inventors of these systems. In Germany, for this reason more credit was given to the information provided by a company like Bosch, which is a specialist in these systems.

In this respect, car shows – mentioned in several countries – obviously constitute an opportunity to obtain information on the various systems.

The credibility of manufacturers is high among all the target groups – motorists and professionals alike.

For salesmen, the manufacturers obviously constitute **the** preferential source of information.

Fleet managers have an especially close relationship – which may be via marketing men or salesmen – with their manufacturer(s), from whom they sometimes receive targeted information.

- **Car salesmen**

Regardless of the country, car salesmen are considered as **one of the least reliable sources** of information on the subject by all buyers, irrespective of the target group:

- They are not always well informed (even on the systems of their own make), something that the study confirmed in a number of points.
- They want to sell and therefore only use the arguments that they think can be of use to them: safety equipment does not seem to them to be a priority matter in this respect.
“The car salesmen don’t explain how those safety systems work, they are only there to sell. A salesman will always play a nice tune” (Professional drivers, France)
- They only know the systems offered by “their” manufacturer and therefore cannot be totally objective.

In the best of cases, customers feel that they will endeavour to “check” the information given by the salesman (by looking on the Internet).

Only car salesmen themselves regard themselves as an important source of information. They think they can influence buyers by means of well-argued information, but acknowledge that their customers do not consider them to be totally impartial.

➤ **Automobile clubs**

With the exception of Germany, where the ADAC is a veritable institution and the motorists’ lobbyist, automobile clubs do not seem to be predestined to provide effective information on safety systems. Virtually unknown in some countries (Poland), and reputed to be elitist in others (France), they seem to have too small an audience to be able to aspire to a major influence. In Italy, doubts are even voiced as to their independence.

This opinion runs across all the target groups.

➤ **Consumers’ associations**

These bodies generally enjoy a very good image in terms of **credibility** and are not suspected of bias. On the other hand, when it comes to systems involving sophisticated technologies, their **competence can be doubted**. This was the case in Germany (despite the excellent reputation of “Stiftung Warentest”). In other countries (Italy), their audience seems too small to be genuinely effective. In Poland – where, as has been said, a degree of suspicion prevails as regards governmental sources – they are considered as one of the most reliable sources since they genuinely act in the interest of consumers.

➤ **Driving schools**

Opinions on the possible function of driving schools in information on safety systems are very **controversial** in all the countries:

- On the one hand it is felt that this information is part and parcel of their duty to educate people about safety and it is felt that they are well enough informed on the benefits – and limits – of these items of equipment.
- On the other hand, they are specialists in driving, not technology, and there are doubts as to whether their information is impartial or biased (for example limited to items of equipment of the makes of vehicle they use for their driving lessons).

- Finally, it is felt that their “customers” are not exactly a target group of buyers of new vehicles, and that therefore they only reach a very small proportion of potential buyers of safety equipment accessories.

It will be recalled here that **driving instructors** are **often very reluctant** as to the usefulness of safety equipment since they regard it as taking responsibility away from the driver. In their eyes, the first safety factor is the driver’s behaviour. This opinion is obviously a way of enhancing the value of their function and their status.

➤ **Insurance companies**

Motorists are often initially surprised at the idea that insurance companies can provide information on safety equipment. This mainly stems from the very **poor image of the profession** in all the countries: people do not imagine them to be at the service of the motorist, they tend more to have an image of “exploiters”. In Italy, there is even talk of the “insurance mafia”. This image is shared by the target groups of professionals.

On reflection, however, it is reckoned that they should have a preferential interest in reducing the number of accidents and that they perhaps have statistics liable to confirm the importance of certain types of equipment, which backs their credibility.

Finally, it is not as a source of information that they are judged to be interesting, but rather because, **through premium reductions, they have a very effective instrument for encouraging motorists to have certain systems fitted**. On this point, there is unanimity among the various target groups.

VI.2 POTENTIAL PURCHASE STIMULI

- ❖ It seems clear that a financial advantage offered to motorists equipping their cars with certain safety systems is liable to facilitate their adoption, in all countries and in the opinion of all the target groups.
- ❖ However, it will be noted that it is difficult to deal with this subject in the absolute without specifying the **type** of equipment and without indications of the **sum** at stake – bearing in mind the considerable differences in the degree to which people want the various systems and the disparities in tax systems and insurance practices.
- ❖ Overall, it will be recalled that motorists' latent desire is not to have to pay for these accessories as **an extra**. In other words, that the effect of the incentive will be all the greater the more this takes the **investment nearer zero**.

A- 10% reduction in the insurance premium

This idea had been put forward spontaneously and is considered as **a possible incentive** for purchase, all the more so since a premium proposed by an insurance company is liable to lend credibility to the usefulness of the equipment in question.

Here again, it is difficult to decide overall on the importance of this measure. On the negative side, it must be recalled that some motorists – more so those with a long driving career behind them and thus often those with medium- to high-range models –, often have premiums alleviated by the bonus system, which risks minimising the impact of another reduction.

Professional users agree in adopting a generally positive view of the effect of a bonus on insurance premiums but express the same reservations as motorists as regards the **real** impact of a 10% bonus. This option could be more interesting for the categories paying a high insurance premium (for example taxi drivers).

To judge the significance of this measure, one wonders whether this reduction would only apply in the year of purchase (which would reduce its relevance) or would be valid for the entire life of the vehicle.

B- A promotional offer from the dealer offering one of these systems free of charge instead of another optional extra offered

This example illustrates in a characteristic manner the problem of motorists' attitudes towards electronic safety systems. This idea arouses **considerable reservations** in all the countries and no judgement can be passed on its importance in absolute terms, i.e. without knowing the item of equipment in question and the optional extras which would have to be given up:

- The hindrance is first and foremost of a psychological nature: the idea of **giving something up** is not viewed favourably by motorists in any of the countries studied. It goes against motorists' desire for a maximum performance of their car for a given budget.

“This option is good as long as you don't have to give anything up. Safety should be given ‘in addition to’, not ‘instead of’” (Driving school teachers, Poland)

“The left hand takes back what the right one gave” (Car owners – Low-medium range, France)

- More fundamentally, it does appear here that motorists are not prepared to give up an optional extra linked to **comfort** (such as those mentioned, CD player and above all air conditioning, which determine the quality of on-board life when the vehicle is being used **on a daily basis** and often convey something of an image of **standing**), in exchange for a safety option the use of which is **hypothetical**. The motorist here has the impression that this is a fool's bargain:

"Instead of getting something basic you are going to get something which you might very well never use, I don't agree with that" (Car owners – Medium-high range, France)

The reservations in respect of this measure are the same among the target groups of professionals and possible opinion formers. They are particularly strong among salesmen who think even less of its effects than the other categories of interviewees and do not see the interest that a manufacturer would have in giving sophisticated equipment which is thus expensive in terms of development costs.

"I can't see it, I can't see people giving up the things they really love – the air con, the climate control, the six speaker CD – for something they may never, hopefully, use" (Car salesmen, Italy)

"It's a nonsense, but this is how many Italians are: if they have to choose between an MP 3 or additional safety equipment, they go for the CD or the MP3" (Car salesmen, Italy)

Rather than **substitution** for another item of equipment, it was recommended here that safety systems be offered as a "pack" with other types of equipment, emphasising the saving made on the purchase of these options individually, which makes the extra costs easier to accept.

C- A tax incentive or a reduction in the registration tax representing 30% of the costs of the system

Here again, the real interest in this measure should be considered in relation to the amount of the saving made bearing in mind the investment needed.

Nonetheless, such a tax exemption measure is considered as a **traditional incentive** and one serving to accelerate the adoption of certain types of equipment (indeed historically the case of the catalytic converter). However, **the impact of this measure would have to be checked**: 70% of the investment still to be borne by the motorist could seem a large proportion.

In Italy, Finland and the United Kingdom, this proposal is met with considerable reservation, whilst it is greeted more favourably in France and Germany. These differences may reflect the differences in the amount of the tax system.

In all cases, the interviewees give preference to a tax incentive spread over **several years** to a single reduction on the registration tax.

The reaction of professional customers to this proposal is identical to that of motorists and likewise that of possible opinion formers. There is support in principle for tax relief, but its effect must be sufficiently consistent to be really effective.

- ❖ In conclusion, it can be said that financial incentives do, in the opinion of all the target groups, constitute a key factor liable to favour the purchase of the most valued equipment, but that the type of incentive needs to be defined accurately bearing in mind the duties and tax rates pertaining to cars in these different countries.

In all cases, it appears here clearly that:

- The safety system will be selected on its **perceived usefulness** in response to an **essential need**.

- The customer is looking for **minimum investment**.

The importance of the effect of image-related factors in the appeal of safety equipment will again be recalled. So it is that in Poland it is emphasised that it would be possible to increase this appeal appreciably the moment these items of equipment were typified as being of “standing”. One might think that this mechanism would also work on other markets. It is this that in part explains the interest in accessories interpreted as being new GPS functions.

ANNEXES

ANNEX I
PARTNER INSTITUTES

**PARTNER INSTITUTES IN THE SIX COUNTRIES
INCLUDED IN THE SCOPE OF THE STUDY**

Germany: Echanges Marktforschung (Cologne)

France: CSA (Paris)

Italy: Market Dynamics International (Milan)

Poland: BSM (Warsaw)

Finland: Marketing Radar (Helsinki)

United Kingdom: Andrew Irving Associates (London)

ANNEX II :

COMPOSITION OF THE SAMPLES

COMPOSITION OF THE SAMPLE

CAR OWNERS' GROUP DISCUSSIONS

	Medium-high range				Low-medium range			
	Men	Women	New car	Second hand	Men	Women	New car	Second hand
Germany	4	4	4	4	5	3	4	4
	(Cologne, 03.03.2006)				(Cologne, 04.03.2006)			
France	6	3	6	3	6	3	5	4
	(Paris, 23.03.2006)				(Paris, 24.03.2006)			
Italy	4	4	6	2	4	4	4	4
	(Milan, 07.03.2006)				(Milan, 09.03.2006)			
Poland	4	4	6	2	3	5	4	4
	(Warsaw, 29.03.2006)				(Warsaw, 29.03.2006)			
Finland	5	3	4	4	5	3	4	4
	(Helsinki, 30.03.2006)				(Helsinki, 29.03.2006)			
United-Kingdom	4	4	5	3	4	3	4	3
	(Surrey, 03.04.2006)				(Surrey, 04.04.2006)			

PERSONAL INTERVIEWS

	Germany	France	Italy	Poland	Finland	United-Kingdom
Professional drivers						
Taxis	2	2	2	2	2	2
Vans	2	2	2	2	2	2
Heavy lorries	2	2	2	2	2	2
Fleet managers						
Taxis	1	1	1	1	1	0
Vans	1	1	1	1	1	1
Heavy lorries	1	1	1	1	1	1
Personal cars	2	1	1	1	1	2
Car salesmen	4	4	4	4	4	4
Driving school instructors	3	3	3	3	3	3
Pedestrians	3	3	3	3	3	3

ANNEX III
DISCUSSION AND INTERVIEW GUIDES



74, chemin de la Ferme des Bois
78950 GAMB AIS

**QUALITATIVE STUDY
« TELEMATICS FOR TRAFFIC »**

**DISCUSSION GUIDE
PRIVATE CAR OWNERS
(15.02.2006)**

INTRODUCTION

Hello, I am, from, the research agency in charge of the study which brings us here together today.

Before we actually begin our discussion, may I ask each of you to introduce him/herself with a few words: who you are, where you live, if you live alone or together with someone else, if you have children and how old they are, and finally what you do for living and/or what your spouse/partner does if applicable.

THEME I

I.1 The first topic I would like to discuss is car usage. Could each of you please tell me how he/she uses his/her own car(s), i.e. how frequently, which kinds of trips, where, and how many kilometres per year you cover, etc.

I.2 Could you tell me about your feelings when driving, i.e. do you find it something pleasant to do, or on the contrary unpleasant or worrying – if so what particularly worries you when driving your car?

THEME II

II.1 Let us now think back to the time when you decided to buy the car(s) that you are now owning.

Could each of you first tell me which car model(s) he/she now owns, when that car was bought and if it was bought new or second hand, and which were the main reasons why you decided to buy that car rather than another model.

II.2 Let us now discuss several factors that may play a role when deciding to buy a car: how important is each one, and how exactly does it play a role in selecting the model you eventually buy?

Probe: importance and role of the following factors:

- Performance
- Design/aesthetics
- Capacity/space
- Comfort
- Safety

- Durability/robustness
- Fuel consumption
- Level of equipment/options
- Reputation of the brand
- (Any other important factor)

THEME III

III.1 Safety is one of the factors I would like to discuss further.

Overall, how safe do you feel when you drive? Have you ever felt particularly unsafe, in what circumstances – please tell me what made you feel particularly unsafe then.

III.2 Do you also happen to feel unsafe for other categories of road users?
Which ones particularly? In what circumstances?

III.3 One hears a lot these days about improving driving safety.
What, in your opinion, could contribute the most to improving safety?

THEME IV

IV.1 There are several factors involved in improving safety – including safety devices and systems installed in the car itself. Which devices and systems have you heard about? How do they work?

IV.2 We often hear the phrases “passive safety” and “active safety”, what does this mean to you?

IV.3 Thinking of your own car(s), which active safety devices and systems does it/do they have?
When you bought your car(s), how much information did you obtain on these? From whom/which sources? And how important was it in your decision to buy that model rather than another model?

IV.4 Thinking of your next car purchase(s), how important are such safety devices and systems likely to be in your decision – both existing systems and new systems that could be offered on the market in the next few years?

THEME V

V.1 I am going to present to you a number of car safety systems that already exist or are likely to be developed shortly.

We are going to discuss each of them, in the following terms:

- What you knew about this system so far
- If you have it on your car – this applies to some of these systems which are already available on certain car models – and what is your car manufacturer’s own name for it
- How interesting/useful you feel it would be to have it on your next car(s)

(Show the respondents the definitions of each of the systems A to J one by one, and probe for their reactions before presenting the definition of the next system).

- A. ABS – Anti-blocking system
- B. ESP – Electronic stability program
- C. Adaptive headlights
- D. Speed alert
- E. Driver condition monitoring
- F. Lane departure warning
- G. Obstacle and collision warning
- H. Local danger warning
- I. RTTI – Real time Travel and Traffic Information

J. E call

V.2 When we buy a car, we obviously have many factors in mind. Ideally, we would like our car to have absolutely everything in it, but the actual decision is a matter of compromise between different desirable options.

Going back to the different safety systems we have been discussing, assuming they are all available on an optional basis, please fill-in this short questionnaire, and note down:

- Which ones you would really like to have – i.e. you would be ready to sacrifice other (non-safety related) features to have them
- Which ones you might also wish to have, yet without having to make sacrifices on other features
- Which ones you would not really bother about

Once you have done it, I will be interested to hear your comments about your answers.

THEME VI

VI.1 Where would you be likely to try and obtain information and advice regarding these car safety systems – any sources that you may think of. Why these sources, what makes you feel they are useful and reliable information sources?

Spontaneous reactions; then probe: interest for and credibility of information from:

- Government bodies
- Car manufacturers
- Motoring clubs
- Consumer associations
- Media articles/programmes
- Car salesmen
- Driving schools
- Insurance companies
- Word of mouth (from whom)

VI.2 Lastly, which incentives would be likely to make you actually buy a car equipped with such systems when you next buy a car? Who – which kinds of organisations – could initiate and promote these incentives? What should they be like to make you actually decide to have these systems installed in your car(s)?

VI.3 Here are some possible incentives. For each one, please tell me if it would actually make you buy your next car equipped with one of these safety systems, and why.

- A. A 10 % rebate on your insurance premium
- B. A promotional offer by the car dealer offering one of these systems free, in place of another free option (such as air-conditioning, sun roof, a quality CD player, electric seats ...)
- C. A tax incentive or reduction of the registration fee amounting to 30 % of the cost of the system

**QUALITATIVE STUDY
« TELEMATICS FOR TRAFFIC »**

**INTERVIEW GUIDE
PROFESSIONAL DRIVERS
(15.02.2006)**

INTRODUCTION

Before we actually begin our interview, could you please tell me about your work as a driver: if you are self-employed or a company's employee, and if so what about this company: its size (in terms of number of employees and number of vehicles) and its core business activities (please describe).

THEME I

I.1 The first topic I would like to discuss is vehicle usage. Could you please tell me how you use your vehicle(s), i.e. which kinds of trips, where, and how many kilometres per year you cover, etc.

I.2 Could you tell me about your feelings when driving, i.e. do you find it something pleasant to do, or on the contrary unpleasant or worrying – if so what particularly worries you when driving as part of your work?

THEME II

II.1 Let us now think back to the time when the decision was made to buy the vehicle(s) that you drive.

Could you first tell me which vehicle model(s) it is, when it was/they were bought, and which were the main reasons for deciding to buy that/those model(s) rather than another model.

II.2 Let us now discuss several factors that may play a role when deciding to buy a vehicle: how important is each one, and how exactly does it play a role in selecting the model eventually bought?

Probe: importance and role of the following factors:

- Performance
- Design/aesthetics
- Capacity/space
- Comfort
- Safety
- Durability/robustness
- Fuel consumption
- Level of equipment/options
- Reputation of the brand
- (Any other important factor)

THEME III

III.1 Safety is one of the factors I would like to discuss further.

Overall, how safe do you feel when you drive? Have you ever felt particularly unsafe, in what circumstances – please tell me what made you feel particularly unsafe then.

III.2 Do you also happen to feel unsafe for other categories of road users?
Which ones particularly? In what circumstances?

III.3 One hears a lot these days about improving driving safety.
What, in your opinion, could contribute the most to improving safety?

THEME IV

IV.1 There are several factors involved in improving safety – including safety devices and systems installed in the vehicle itself. Which devices and systems have you heard about? How do they work?

IV.2 We often hear the phrases “passive safety” and “active safety”, what does this mean to you?

IV.3 Thinking of the vehicle(s) you drive, which active safety devices and systems does it/do they have? When it was/they were bought, how much information did you obtain on these? From whom/which sources? And how important was it in the decision to buy that/those model(s) rather than another model?

IV.4 Thinking of your future vehicles, how important are such safety devices and systems likely to be in the purchase decision – both existing systems and new systems that could be offered on the market in the next few years?

THEME V

V.1 I am going to present to you a number of vehicle safety systems that already exist or are likely to be developed shortly.

We are going to discuss each of them, in the following terms:

- What you knew about this system so far
- If you have it on your vehicle(s) – this applies to some of these systems which are already available on certain vehicle models – and what is your vehicle manufacturer’s own name for it
- How interesting/useful you feel it would be to have it on your next vehicle(s)

(Show the respondents the definitions of each of the systems A to J one by one, and probe for their reactions before presenting the definition of the next system).

- A. ABS – Anti-blocking system
- B. ESP – Electronic stability program
- C. Adaptive headlights
- D. Speed alert
- E. Driver condition monitoring
- F. Lane departure warning
- G. Obstacle and collision warning
- H. Local danger warning
- I. RTTI – Real time Travel and Traffic Information
- J. E call

V.2 When acquiring a new vehicle, many factors obviously play a role. Ideally, we would like our vehicles to have absolutely everything in them, but the actual decision is a matter of compromise between different desirable options.

Going back to the different safety systems we have been discussing, assuming they are all available on an optional basis, please fill-in this short questionnaire, and note down:

- Which ones you would really like to have – i.e. you would be ready to sacrifice other (non-safety related) features to have them

- Which ones you might also wish to have, yet without having to make sacrifices on other features
- Which ones you would not really bother about

Once you have done it, I will be interested to hear your comments about your answers.

THEME VI

VI.1 Where would you be likely to try and obtain information and advice regarding these vehicle safety systems – any sources that you may think of. Why these sources, what makes you feel they are useful and reliable information sources?

Spontaneous reactions; then probe: interest for and credibility of information from:

- Government bodies
- Vehicle manufacturers
- Motoring clubs
- Your profession's own associations
- Media articles/programmes
- Vehicle salesmen
- Insurance companies
- Word of mouth (from whom)

VI.2 Lastly, which incentives would be likely to lead to a decision to acquire a vehicle equipped with such systems next time? Who – which kinds of organisations – could initiate and promote these incentives? What should they be like to lead to a decision actually to have these systems installed in your vehicle(s)?

VI.3 Here are some possible incentives. For each one, please tell me if it would actually lead to a decision to acquire a vehicle equipped with one of these safety systems, and why.

- A. A 10 % rebate on the insurance premium
- B. A promotional offer by the vehicle dealer offering one of these systems free, in place of another free option
- C. A tax incentive or reduction of the registration fee amounting to 30 % of the cost of the system

**QUALITATIVE STUDY
« TELEMATICS FOR TRAFFIC »**

**INTERVIEW GUIDE
FLEET MANAGERS
(15.02.2006)**

INTRODUCTION

Before we actually begin our interview, could you please tell me a little about your own job (i.e. your job title and your responsibilities) and about your company: its size (in terms of number of employees and number of vehicles) and its core business activities (please describe).

THEME I

I.1 The first topic I would like to discuss is vehicle usage. Could you please tell me how your vehicles are used, i.e. which kinds of trips, where, and how many kilometres per year they cover, etc.

I.2 Could you tell me about your drivers' feelings when driving, i.e. do they find it something pleasant to do, or on the contrary unpleasant or worrying – if so what particularly worries them when driving as part of their work?

THEME II

II.1 Let us now think back to the time when the decisions were made to buy the vehicles in your fleet.

Could you first tell me which vehicle model(s) they are, when they were bought, and which were the main reasons for deciding to buy that/those model(s) rather than another model.

II.2 Let us now discuss several factors that may play a role when deciding to buy a vehicle: how important is each one, and how exactly does it play a role in selecting the model eventually bought?

Probe: importance and role of the following factors:

- Performance
- Design/aesthetics
- Capacity/space
- Comfort
- Safety
- Durability/robustness
- Fuel consumption
- Level of equipment/options
- Reputation of the brand
- (Any other important factor)

THEME III

III.1 Safety is one of the factors I would like to discuss further.

Overall, how safe do you feel about your drivers' driving? Do they ever feel particularly unsafe, in what circumstances – please tell me what makes them feel particularly unsafe then.

III.2 Do you also happen to feel unsafe for other categories of road users?
Which ones particularly? In what circumstances?

III.3 One hears a lot these days about improving driving safety.
What, in your opinion, could contribute the most to improving safety?

THEME IV

IV.1 There are several factors involved in improving safety – including safety devices and systems installed in the vehicle itself. Which devices and systems have you heard about? How do they work?

IV.2 We often hear the phrases “passive safety” and “active safety”, how would you define these notions – what do they involve?

IV.3 Thinking of your fleet’s vehicles, which active safety devices and systems do they have? When they were bought, how much information did you obtain on these? From whom/which sources? And how important was it in the decision to buy that/those model(s) rather than another model?

IV.4 Thinking of your future vehicles, how important are such safety devices and systems likely to be in the purchase decision – both existing systems and new systems that could be offered on the market in the next few years?

THEME V

V.1 I am going to present to you a number of vehicle safety systems that already exist or are likely to be developed shortly.

We are going to discuss each of them, in the following terms:

- What you knew about this system so far
- If you have it on your vehicles – this applies to some of these systems which are already available on certain vehicle models – and what is your vehicle manufacturer’s own name for it
- How interesting/useful you feel it would be to have it on your next vehicles

(Show the respondents the definitions of each of the systems A to J one by one, and probe for their reactions before presenting the definition of the next system).

- A. ABS – Anti-blocking system
- B. ESP – Electronic stability program
- C. Adaptive headlights
- D. Speed alert
- E. Driver condition monitoring
- F. Lane departure warning
- G. Obstacle and collision warning
- H. Local danger warning
- I. RTTI – Real time Travel and Traffic Information
- J. E call

V.2 When acquiring new vehicles, many factors obviously play a role. Ideally, we would like our vehicles to have absolutely everything in them, but the actual decision is a matter of compromise between different desirable options.

Going back to the different safety systems we have been discussing, assuming they are all available on an optional basis, please fill-in this short questionnaire, and note down:

- Which ones you would really like to have – i.e. you would be ready to sacrifice other (non-safety related) features to have them

- Which ones you might also wish to have, yet without having to make sacrifices on other features
- Which ones you would not really bother about

Once you have done it, I will be interested to hear your comments about your answers.

THEME VI

VI.1 Where would you be likely to try and obtain information and advice regarding these vehicle safety systems – any sources that you may think of. Why these sources, what makes you feel they are useful and reliable information sources?

Spontaneous reactions; then probe: interest for and credibility of information from:

- Government bodies
- Vehicle manufacturers
- Motoring clubs
- Your profession's own associations
- Media articles/programmes
- Vehicle salesmen
- Insurance companies
- Word of mouth (from whom)

VI.2 Lastly, which incentives would be likely to lead to a decision to acquire new vehicles equipped with such systems next time? Who – which kinds of organisations – could initiate and promote these incentives? What should they be like to lead to a decision actually to have these systems installed in your vehicles?

VI.3 Here are some possible incentives. For each one, please tell me if it would actually lead to a decision to acquire vehicles equipped with one of these safety systems, and why.

- A. A 10 % rebate on the insurance premium
- C. A promotional offer by the vehicle dealer offering one of these systems free, in place of another free option
- D. A tax incentive or reduction of the registration fee amounting to 30 % of the cost of the system

**QUALITATIVE STUDY
« TELEMATICS FOR TRAFFIC »**

**INTERVIEW GUIDE
CAR SELLERS/DRIVING SCHOOL TEACHERS
(15.02.2006)**

INTRODUCTION

Before we actually begin our interview, could you please tell me a little about your work and the company/establishment where you work?

THEME I

I.1 The first topic I would like to discuss is car usage. Do you deal with different types of people as regards car usage, i.e. how frequently, which kinds of trips, where, and how many kilometres per year they cover or plan to cover, etc.

I.2 Could you give me your feelings about people's driving, i.e. do they find it something pleasant to do, or on the contrary unpleasant or worrying – if so what particularly worries them when driving their car?

THEME II

II.1 Let us now think of the people you deal with, when they decide or plan to buy a car. Which are their main reasons for deciding to buy a car model rather than another model?

II.2 Let us now discuss several factors that may play a role when deciding to buy a car: how important do you think is each one, and how exactly does it play a role in selecting the model people eventually buy?

Probe: importance and role of the following factors:

- Performance
- Design/aesthetics
- Capacity/space
- Comfort
- Safety
- Durability/robustness
- Fuel consumption
- Level of equipment/options
- Reputation of the brand
- (Any other important factor)

THEME III

III.1 Safety is one of the factors I would like to discuss further.

Overall, how safe do you feel people are when they drive? Do they ever feel particularly unsafe, in what circumstances – according to you what makes them feel particularly unsafe then?

III.2 Do you also happen to feel unsafe for other categories of road users?

Which ones particularly? In what circumstances?

III.3 One hears a lot these days about improving driving safety.

What, in your opinion, could contribute the most to improving safety?

THEME IV

IV.1 There are several factors involved in improving safety – including safety devices and systems installed in the car itself. Which devices and systems have you heard about? How do they work?

IV.2 We often hear the phrases “passive safety” and “active safety”, how would you define these notions – what do they involve?

IV.3 Thinking of people who have active safety devices and systems installed on their car, how much information do you think they obtained on these? From whom/which sources? And how important was it in their decision to buy a model rather than another model?

IV.4 Thinking of future car purchases, how important are such safety devices and systems likely to be in car owners’ decisions – both existing systems and new systems that could be offered on the market in the next few years?

THEME V

V.1 I am going to present to you a number of car safety systems that already exist or are likely to be developed shortly.

We are going to discuss each of them, in the following terms:

- What you knew about this system so far
- The profile of people who already have it on their car – this applies to some of these systems which are already available on certain car models
- How interesting/useful you feel it would be for improving car safety

(Show the respondents the definitions of each of the systems A to J one by one, and probe for their reactions before presenting the definition of the next system).

- A. ABS – Anti-blocking system
- B. ESP – Electronic stability program
- C. Adaptive headlights
- D. Speed alert
- E. Driver condition monitoring
- F. Lane departure warning
- G. Obstacle and collision warning
- H. Local danger warning
- I. RTTI – Real time Travel and Traffic Information
- J. E call

V.2 When buying a car, people obviously have many factors in mind. Ideally, they would like their car to have absolutely everything in it, but the actual decision is a matter of compromise between different desirable options.

Going back to the different safety systems we have been discussing, assuming they are all available on an optional basis, please fill-in this short questionnaire, and note down:

- Which ones you think would really be very useful – i.e. safety would really be improved if more cars were equipped with them
- Which ones you feel would also be desirable, yet not with the same degree of priority
- Which ones you feel would not really be very useful

Once you have done it, I will be interested to hear your comments about your answers.

THEME VI

VI.1 Which do you feel would be the best sources to obtain information and advice regarding these car safety systems – any sources that you may think of. Why these sources, what makes you feel they are useful and reliable information sources?

Spontaneous reactions; then probe: interest for and credibility of information from:

- Government bodies
- Car manufacturers
- Motoring clubs
- Your profession's own associations
- Media articles/programmes
- Car salesmen
- Driving schools
- Insurance companies
- Word of mouth (from whom)

VI.2 Lastly, which incentives would be likely to lead people to buy a car equipped with such systems? Who – which kinds of organisations – could initiate and promote these incentives? What should they be like to make them actually decide to have these systems installed in their car?

VI.3 Here are some possible incentives. For each one, please tell me if it would actually be instrumental to make people buy cars equipped with one of these safety systems, and why.

- A. A 10 % rebate on the insurance premium
- B. A promotional offer by car dealers offering one of these systems free, in place of another free option (such as air-conditioning, sun roof, a quality CD player, electric seats ...)
- C. A tax incentive or reduction of the registration fee amounting to 30 % of the cost of the system

**QUALITATIVE STUDY
« TELEMATICS FOR TRAFFIC »**

**INTERVIEW GUIDE
PEDESTRIANS
(15.02.2006)**

INTRODUCTION

Before we actually begin our interview, may I ask a few details about yourself: who you are, where you live, if you live alone or together with someone else, if you have children and how old they are, and finally what you do for living and/or what your spouse/partner does if applicable.

THEME I

I.1 The first topic I would like to discuss is usage of different means of transport. If you personally have a car, can you please tell me when you use it, i.e. how frequently, which kinds of trips, where, and how many kilometres per year you cover, etc, and when you do not use it. If you do not own a car, could you tell me why, and which means of transport you use instead?

I.2 Could you give me your feelings about people's driving, i.e. is it something that worries you – if so what particularly worries you as a pedestrian about people's driving?

THEME II

II.1 Let us now think of people you know when they decide or plan to buy a car. Which are their main reasons for deciding to buy a car model rather than another model?

II.2 Let us now discuss several factors that may play a role when deciding to buy a car: how important do you think is each one, and how exactly does it play a role in selecting the model people eventually buy?

Probe: importance and role of the following factors:

- Performance
- Design/aesthetics
- Capacity/space
- Comfort
- Safety
- Durability/robustness
- Fuel consumption
- Level of equipment/options
- Reputation of the brand
- (Any other important factor)

THEME III

III.1 Safety is one of the factors I would like to discuss further.

Overall, how safe do you feel as a pedestrian? Have you ever felt particularly unsafe, in what circumstances – please tell me what made you feel particularly unsafe then.

III.2 Do you also happen to feel unsafe for other categories of road users?
Which ones particularly? In what circumstances?

III.3 One hears a lot these days about improving driving safety.
What, in your opinion, could contribute the most to improving safety?

THEME IV

IV.1 There are several factors involved in improving safety – including safety devices and systems installed in the car itself. Which devices and systems have you heard about? How do they work?

IV.2 We often hear the phrases “passive safety” and “active safety”, what does this mean to you?

IV.3 Thinking of people who have active safety devices and systems installed on their cars, how much information do you think they obtained on these? From whom/which sources? And how important was it in their decision to buy a model rather than another model?

IV.4 Thinking of future car purchases, how important are such safety devices and systems likely to be in car owners’ decisions – both existing systems and new systems that could be offered on the market in the next few years?

THEME V

V.1 I am going to present to you a number of car safety systems that already exist or are likely to be developed shortly.

We are going to discuss each of them, in the following terms:

- What you knew about this system so far
- The profile of people who already have it on their car – this applies to some of these systems which are already available on certain car models
- How interesting/useful you feel it would be for improving car safety?

(Show the respondents the definitions of each of the systems A to J one by one, and probe for their reactions before presenting the definition of the next system).

- A. ABS – Anti-blocking system
- B. ESP – Electronic stability program
- C. Adaptive headlights
- D. Speed alert
- E. Driver condition monitoring
- F. Lane departure warning
- G. Obstacle and collision warning
- H. Local danger warning
- I. RTTI – Real time Travel and Traffic Information
- J. E call

V.2 When buying a car, people obviously have many factors in mind. Ideally, they would like their car to have absolutely everything in it, but the actual decision is a matter of compromise between different desirable options.

Going back to the different safety systems we have been discussing, assuming they are all available on an optional basis, please fill-in this short questionnaire, and note down:

- Which ones you think would really be very useful – i.e. you would really feel safer if more cars were equipped with them
- Which ones you feel would also be desirable, yet not with the same degree of priority
- Which ones you feel would not really be very useful

Once you have done it, I will be interested to hear your comments about your answers.

THEME VI

VI.1 Which do you feel would be the best sources to obtain information and advice regarding these car safety systems – any sources that you may think of. Why these sources, what makes you feel they are useful and reliable information sources?

Spontaneous reactions; then probe: interest for and credibility of information from:

- Government bodies
- Car manufacturers
- Motoring clubs
- Consumer associations
- Media articles/programmes
- Car salesmen
- Driving schools
- Insurance companies
- Word of mouth (from whom)

VI.2 Lastly, which incentives would be likely to lead people to buy a car equipped with such systems? Who – which kinds of organisations – could initiate and promote these incentives? What should they be like to make them actually decide to have these systems installed in their car?

VI.3 Here are some possible incentives. For each one, please tell me if you feel it would actually be instrumental to make people buy cars equipped with one of these safety systems, and why.

- A. A 10 % rebate on the insurance premium
- B. A promotional offer by car dealers offering one of these systems free, in place of another free option (such as air-conditioning, sun roof, a quality CD player, electric seats ...)
- C. A tax incentive or reduction of the registration fee amounting to 30 % of the cost of the system