

AXA Road Behaviour Survey in Europe

Multi-country report - 2009 summary version



Ipsos Marketing
The Innovation and Brand Research Specialists

redefining / standards





Methodology

■ Scope of Research:

The survey was conducted in 10 countries, namely Belgium, France, Germany, Great Britain, Ireland (both Northern Ireland & the Republic of Ireland), Italy, Luxembourg, Portugal, Spain and Switzerland.

This report features the findings from Europe in 2009.

- Whenever in the following pages we refer to:
 - European countries, we mean the European countries covered by the survey.
 - 2009, we mean the results of the survey carried out at the end of June 2009, but concerning behaviour over the previous 12 months (i.e. June 2008 until June 2009).

■ For the survey, the methodology was:

● Target: Drivers aged 18 and over, who

- Hold a car driving licence,
- Have driven at least once in the past 12 months.

● Sample:

- 800 interviews were conducted per country
- In each country, these 800 drivers interviewed were nationally representative in terms of age, gender and region, via the allocation of quotas.

● Data collection:

- Interviews were carried out by telephone (CATI systems),
- Data was collected from 16th June to 29th June 2009,
- The questionnaire lasted an average of 20 minutes.



Research Findings





A. Outline of Research Project



Sample Structure 1/2

⇒ In some countries, when quotas proved hard to achieve, they were weighted to fit exactly with the national distribution.

	Belgium		Germany		Ireland		Italy		Luxemburg		Portugal		Spain		Switzerland		Great Britain		France		
	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	Unw.	W.	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Basis	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Gender																					
Male	59	59	55	55	54	54	65	65	50	50	48	57	61	61	50	52	55	54	49	49	
Female	41	41	45	45	46	46	35	35	50	50	52	43	39	39	50	48	45	46	51	51	
Age																					
17 years old (only in Ireland and GB)					1	1											1	1			
18 - 24 years old	9	9	11	13	10	10	7	7	11	11	17	13	10	9	5	8	9	10			
25 - 34 years old	18	19	21	19	17	18	15	15	19	19	18	23	23	26	15	16	18	18			
35 - 44 years old	23	23	18	18	23	22	31	32	20	22	17	22	25	25	23	23	23	22			
45 - 54 years old	19	19	17	17	19	19	20	20	23	20	15	18	19	19	22	20	19	19			
55 - 64 years old	15	14	17	17	17	16	20	19	15	17	13	12	13	12	16	15	17	16			
65 years old and more	16	16	16	16	14	14	7	7	12	11	20	12	9	9	20	18	14	14			
Less than 25 yo																			5	5	
25-34 yo																			18	19	
35-49 yo																			32	31	
50-64 yo																			27	27	
65 yo and more																			17	18	



All bases in this report are unweighted

Unw.: unweighted

W.: weighted



Sample Structure 2/2

	Unw. %	W. %
Basis	100	100
Region - Belgium		
Nielsen I	24	24
Nielsen II	32	32
Nielsen III	11	11
Nielsen IV	16	16
Nielsen V	17	17
Region - Germany		
North : Nielsen I+ Mecklenburg-Vorpommern	19	19
West : Nielsen II	22	22
East : Nielsen V(a&b)+Nielsen VI except Mecklenburg-Vorpommern	11	11
South : Nielsen IIb and IV	28	28
Others	21	21
Region - Ireland		
Leinster	38	38
Munster	19	19
Connacht	8	8
Ulster (IFL)	4	4
Northern Ireland	30	30
Region - Italy		
North west	27	27
North east	19	19
Center	19	19
South	35	35
Region - Luxemburg		
Luxemburg city	17	17
Rest centre	16	16
South	40	40
North	15	15
East	12	13

	Unw. %	W. %
Basis	100	100
Region - Portugal		
Grande Lisboa	21	21
Grande Porto	11	11
Litoral Norte	26	26
Litoral Centro	11	11
Interior Norte	13	13
Sul	14	14
Ilhas (Açores, Madeira)	4	4
Region - Spain		
Andalucía	16	16
Aragón	3	3
Asturias (Principado de)	3	3
Balears (Illes)	2	2
Canarias	4	4
Cantabria	2	2
Castilla y León	7	7
Castilla-La Mancha	4	4
Cataluña	16	16
Comunidad Valenciana	11	11
Extremadura	3	3
Galicia	7	7
Madrid (Comunidad de)	13	13
Murcia (Región de)	3	3
Navarra (Comunidad Foral de)	2	2
País Vasco	5	5
Rioja (La)	1	1
Ceuta y Melilla	0	0

	Unw. %	W. %
Basis	100	100
Region - Switzerland		
German speaking part	70	70
French speaking part	25	25
Italian speaking part	5	5
Region - Great-Britain		
North & Yorkshire	13	13
North West	12	12
Midlands	16	16
South West & Wales	13	13
South East & Anglia	23	23
London	13	13
Scotland	10	10
Region - France		
Parisian area	14	14
West Parisian Area	10	10
East Parisian Area	8	8
North	6	6
West	16	16
East	9	9
South West	11	11
South East	12	12
Mediterranean	13	13



All bases in this report are unweighted

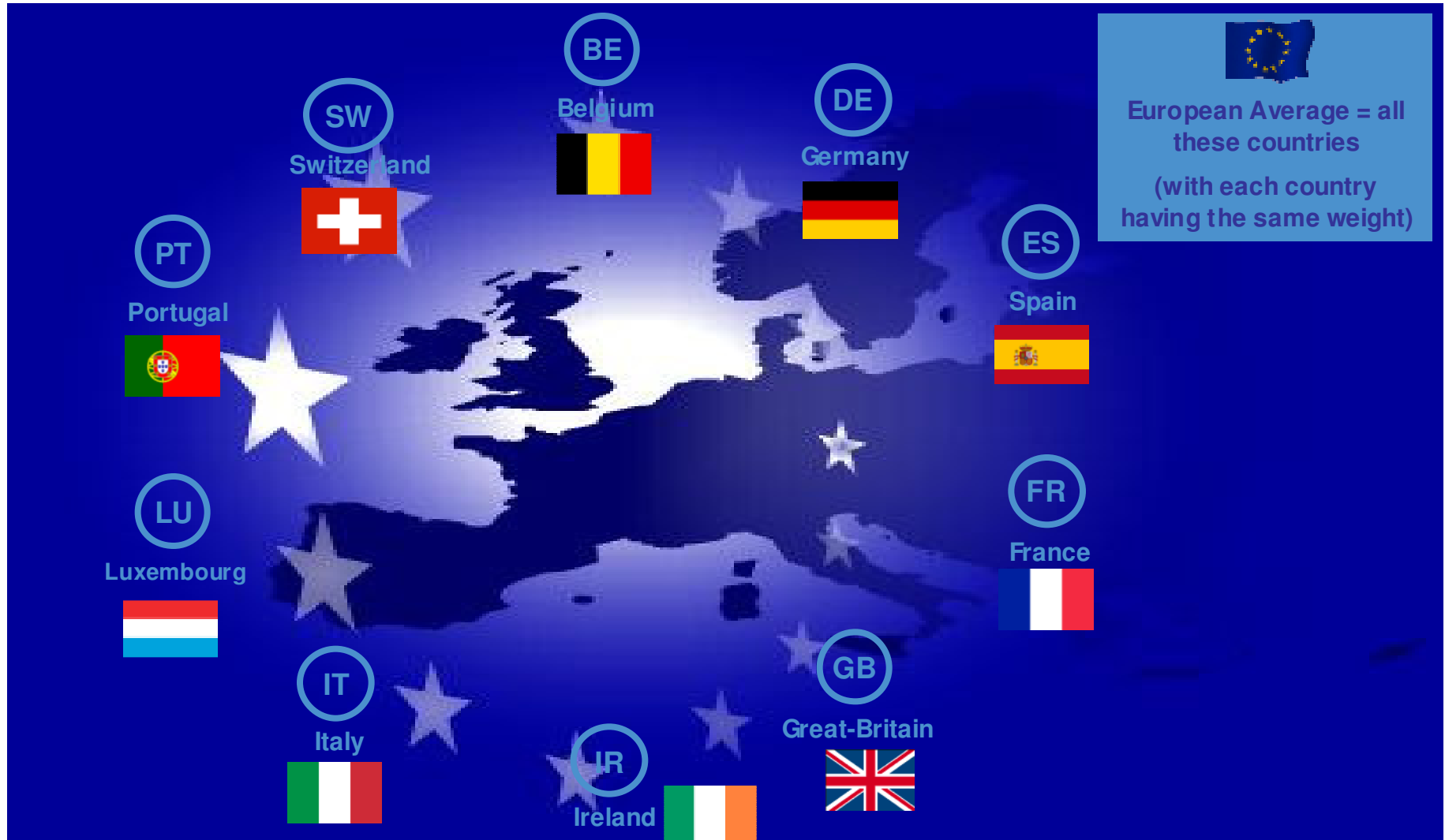
Unw.: unweighted

W.: weighted





Interpreting the slides 1/3





Interpreting the slides 2/3

Question



Feeling of road safety

Like in 2008, Great Britain, Ireland, Germany and Switzerland have a high feeling of road safety, contrary to Southern countries such as Spain, Portugal, and above all Italy but also in France, where at least 30% of drivers feel unsafe on their roads.

Basis: total sample

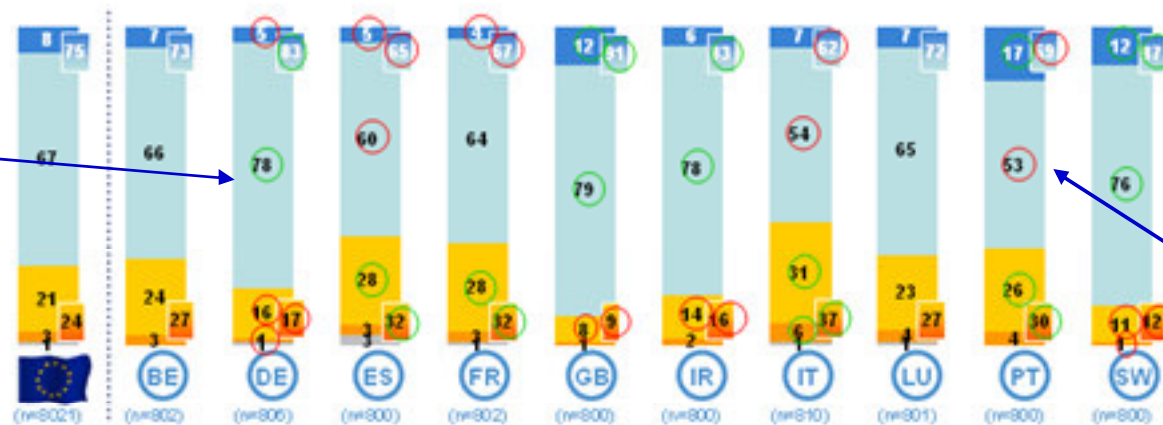
Universe answered

Q15. With respect to the risk of an accident, how safe do you feel on the roads? Would you say you feel totally safe, fairly safe, fairly unsafe or totally unsafe? (single answer)

- Totally safe ST Safe
- Fairly safe
- Fairly unsafe
- Totally unsafe ST Unsafe
- DK

in %

In green, significant higher differences in comparison with European mean



In red, significant lower differences in comparison with European mean

In the following slides: DK = Don't know

These slides contain significant differences between Total and every country.



Interpreting the slides 3/3



Feeling of road safety

Italian, Spanish, French and Portuguese drivers feel safer on roads than last year, even though these results remain among the lowest across Europe.

Basis : total sample

Universe answered

Question

Q15. With respect to the risk of an accident, how safe do you feel on the roads? Would you say you feel totally safe, fairly safe, fairly unsafe or totally unsafe? (single answer)

	Basis	ST Safe			Totally safe			ST Unsafe		
		2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium	(n=802)	76	73	-3	7	7	0	23	27	4
Germany	(n=806)	82	83	1	6	5	-2	16	17	0
Spain	(n=800)	57	65	8 +	4	5	1	38	32	-6 -
France	(n=802)	61	67	6 +	1	4	2	39	32	-7 -
Great Britain	(n=800)	89	91	1	9	12	3 +	10	9	-1
Ireland	(n=800)	79	83	4 +	7	6	-1	20	16	-4
Italy	(n=810)	51	62	10 +	6	7	1	47	37	-10 -
Luxembourg	(n=801)	71	72	1	7	7	1	27	27	0
Portugal	(n=800)	60	69	10 +	10	17	7 +	40	30	-10 -
Switzerland	(n=800)	84	87	3	11	12	1	15	12	-3

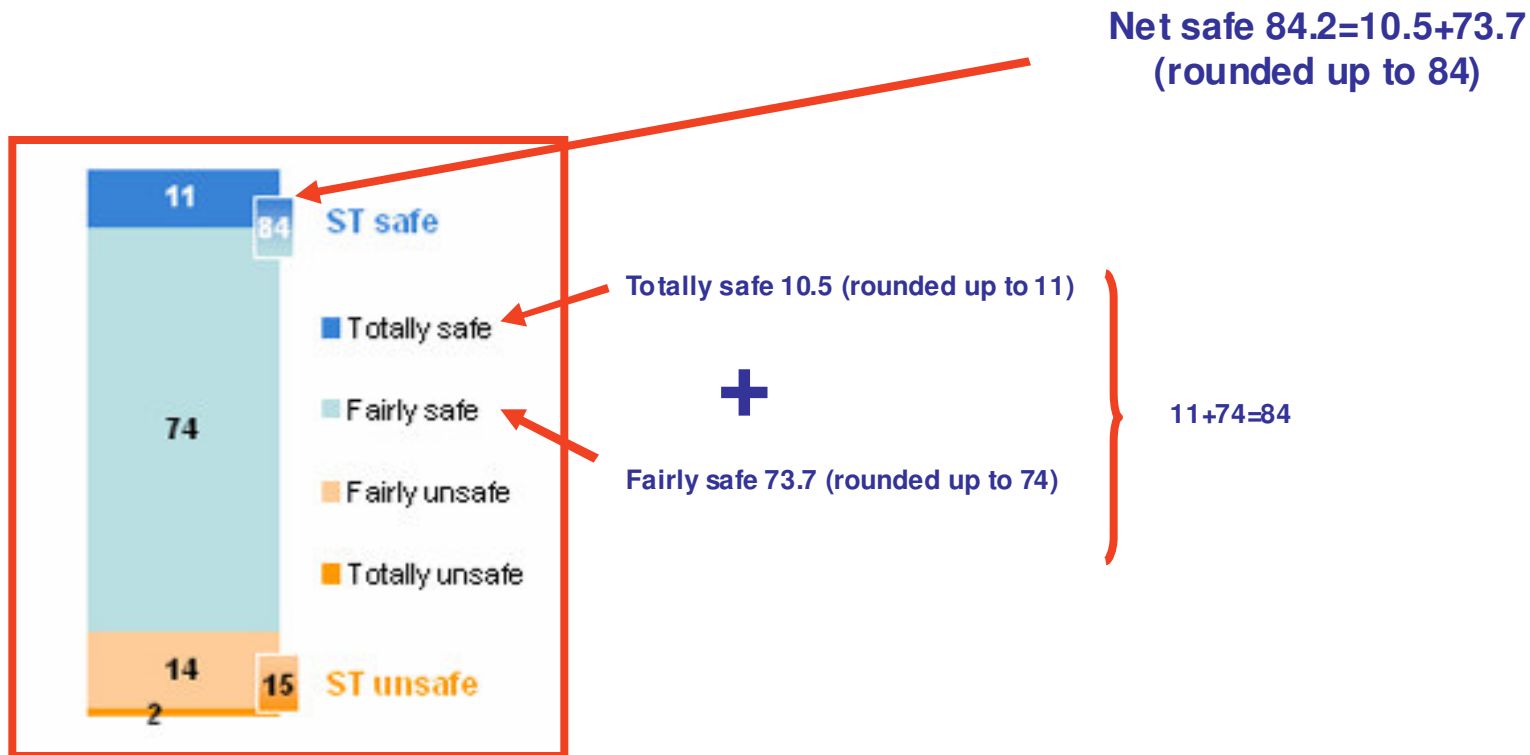
In green, significant increase in comparison with 2008

In red, significant decrease in comparison with 2008



Note when reading a slide

- Sometimes, the net and total of the items that made it up are different: this can be explained by the fact that the figures are rounded up.
- For example:





B. In-depth Findings



B. In-depth Findings

1 – Perception of road safety in Europe

- Feeling of road safety
- Perception of European drivers
- Changes in personal driver behaviour
- Elements influencing road behaviour



Perception of road safety

Key findings

- 3 out of 4 European drivers **feel safe on their roads**.
This feeling is the
 - Highest in Great Britain, and the
 - Lowest in Italy (despite a significant rise compared to the year before).
- Across Europe, citizens remain **proud of their own driving behaviour**:
 - Almost **7 out of 10 Europeans perceive themselves as good drivers**.
 - The Swiss have a very good perception of their compatriots (highest results across Europe).
 - The Southern European countries have the lowest perception of their driving skills whereas the Northern countries have the highest one.
- **Germany** is the **country with the best drivers** for most European respondents.
- **Nearly 3 out of 10 European respondents stated that they have changed their driving behaviour** over the past year.
 - France is the country with the highest rate (40%).
- Overall, the reasons for changes in driving behaviour over the past year are:
 - Awareness of dangers of the road (59%), especially in Ireland (76%),
 - Possibility of losing points on driving licence (48%), especially in Ireland again (66%).
 - Installation of speed cameras on roads (48%), especially in France, GB, Spain and Italy (above 53%).



Feeling of road safety

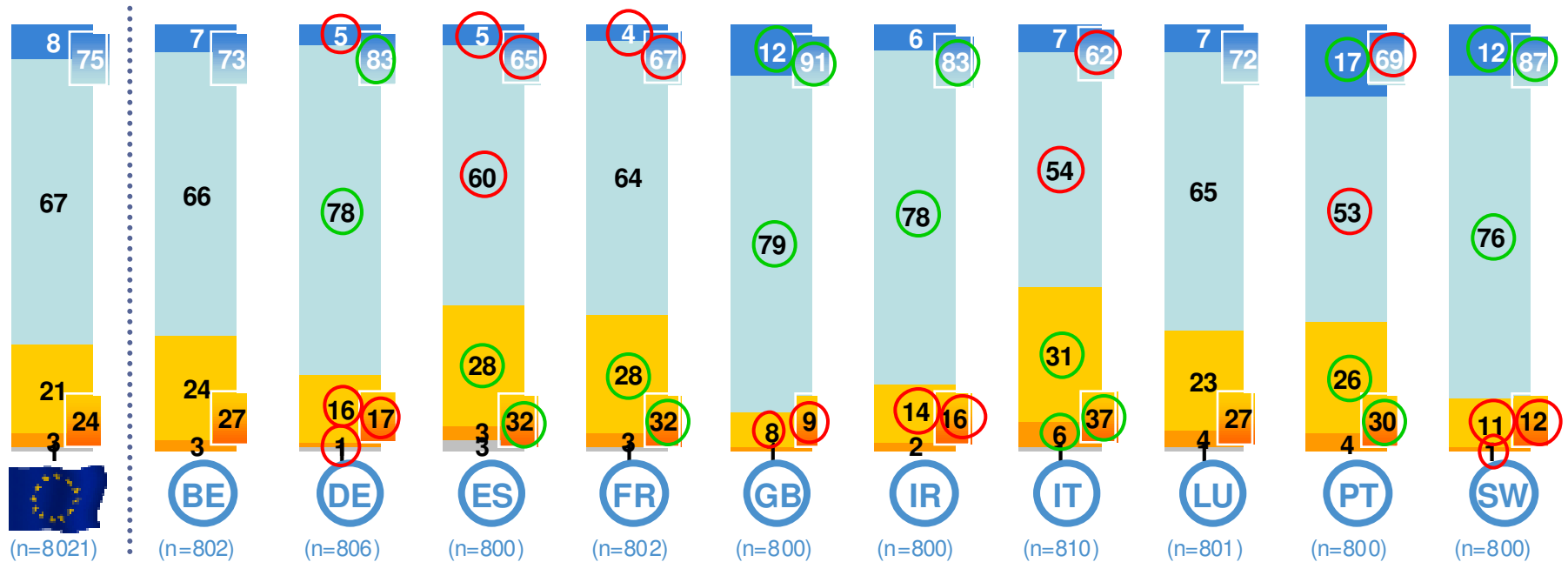
As was the case in 2008, Great Britain, Switzerland, Ireland and Germany have a high feeling of road safety, contrary to Southern European countries such as Portugal, Spain, France and above all Italy, where at least 30% of drivers feel unsafe on their roads.

Basis: total sample

Q15. With respect to the risk of an accident, how safe do you feel on the roads? Would you say you feel totally safe, fairly safe, fairly unsafe or totally unsafe? (single answer)

- Totally safe
 - Fairly safe
 - Fairly unsafe
 - Totally unsafe
 - DK
- ST Safe**
- ST Unsafe**

In %





Feeling of road safety

Italian, Spanish, French and Portuguese drivers feel safer on the roads than last year, even though these results remain among the lowest across Europe.

Basis: total sample

Q15. With respect to the risk of an accident, how safe do you feel on the roads? Would you say you feel totally safe, fairly safe, fairly unsafe or totally unsafe? (single answer)

Basis	ST Safe			Totally safe			ST Unsafe		
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium (n=802)	76	73	-3	7	7	0	23	27	4
Germany (n=806)	82	83	1	6	5	-2	16	17	0
Spain (n=800)	57	65	8 +	4	5	1	38	32	-6 -
France (n=802)	61	67	6 +	1	4	2	39	32	-7 -
Great Britain (n=800)	89	91	1	9	12	3 +	10	9	-1
Ireland (n=800)	79	83	4 +	7	6	-1	20	16	-4
Italy (n=810)	51	62	10 +	6	7	1	47	37	-10 -
Luxembourg (n=801)	71	72	1	7	7	1	27	27	0
Portugal (n=800)	60	69	10 +	10	17	7 +	40	30	-10 -
Switzerland (n=800)	84	87	3	11	12	1	15	12	-3



Perception of European drivers

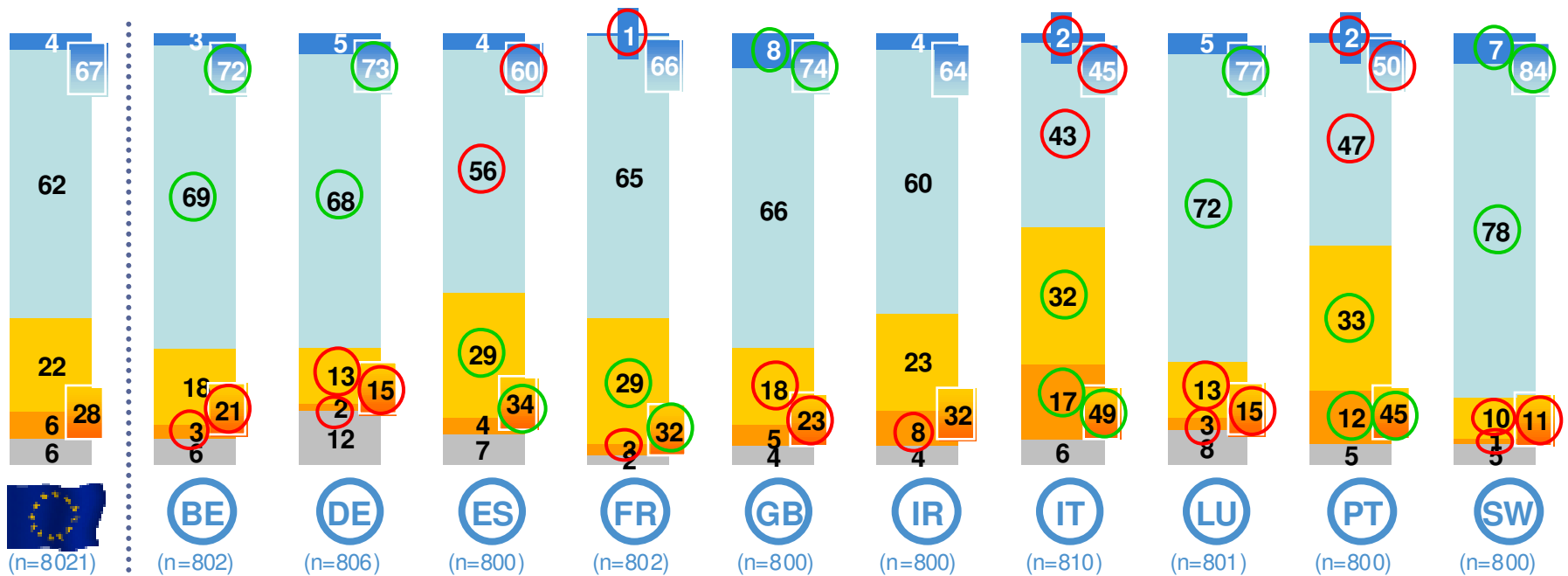
Overall, 7 drivers out of 10 consider themselves to be good drivers. Swiss drivers have the highest positive perception of themselves. But as with the feeling of road safety, the Southern European countries, especially Italy, think their fellow citizens are bad drivers.

Basis: total sample

Q12. As a whole, do you think [country] drivers are very good drivers, fairly good, fairly bad or very bad drivers? (single answer)

- Very good drivers **ST Good**
- Fairly good
- Fairly bad
- Very bad drivers **ST Bad**
- DK

In %





Perception of European drivers

The image of national drivers has improved significantly in Spain. In contrast, in Luxembourg, drivers are more critical than last year of their compatriots. Other countries remain steady.

Basis: total sample

Q12. As a whole, do you think [country] drivers are very good drivers, fairly good, fairly bad or very bad drivers? (single answer)

Basis	ST Good			Very good drivers			ST Bad		
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium (n=802)	76	72	-4	4	3	-1	18	21	4
Germany (n=806)	69	73	4	7	5	-2	18	15	-3
Spain (n=800)	51	60	9 +	3	4	1	37	34	-3
France (n=802)	62	66	4	0	1	1	37	32	-5
Great Britain (n=800)	76	74	-2	7	8	0	21	23	2
Ireland (n=800)	63	64	1	6	4	-1	34	32	-2
Italy (n=810)	45	45	-1	3	2	-1	49	49	0
Luxembourg (n=801)	81	77	-4 -	4	5	1	12	15	4 +
Portugal (n=800)	46	50	4	1	2	1 +	50	45	-5
Switzerland (n=800)	83	84	1	7	7	-1	10	11	0



Comparison of national drivers with other European countries

Across Europe, northern citizens as well as the Swiss have a good opinion of their compatriots, especially the British, who produced the highest score.

Basis: total sample

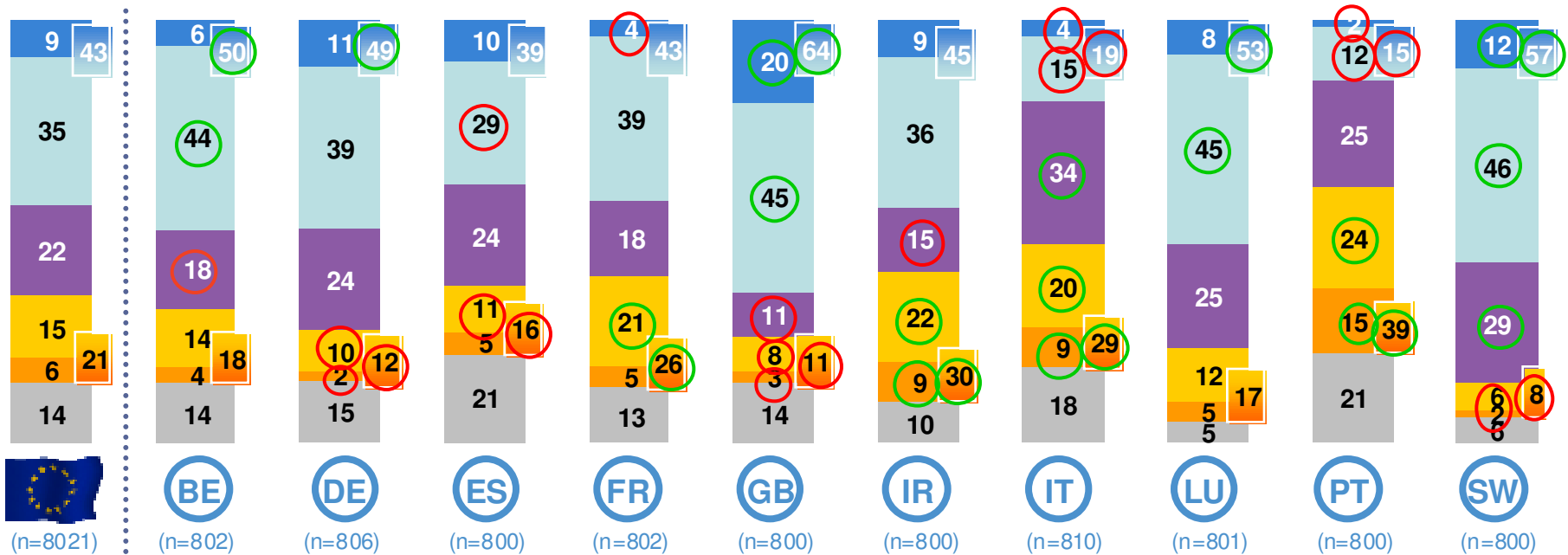
Q13. Do you think that in [country] people drive clearly better, somewhat better, not quite as well as in other countries, clearly worse than in other countries, neither better nor worse? (single answer)

- Clearly better than in other countries
- Somewhat better than in other countries
- Neither better nor worse
- Not quite as good as in other countries
- Clearly worse than in other countries
- DK

ST Better

ST Worse

In %





Comparison of national drivers with other European countries

The overall results are similar to last year. However, the Italians and Portuguese rated their compatriots as worse drivers than anywhere else. And in Luxembourg, opinion evolved because more people than last year expressed their opinion (37% "don't know" in 2008 vs. 5% in 2009).

Basis: total sample

Q13. Do you think that in [country] people drive clearly better, somewhat better, not quite as well as in other countries, clearly worse than in other countries, neither better nor worse? (single answer)

	Basis	ST Better			Clearly better			ST Worse			
		2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	
Belgium	(n=802)	48	50	2	8	6	-2	13	18	5	+
Germany	(n=806)	48	49	1	12	11	-1	14	12	-2	
Spain	(n=800)	36	39	4	8	10	2	19	16	-3	
France	(n=802)	NA	43	-	0	4	4	NA	26	-	
Great Britain	(n=800)	64	64	0	19	20	0	9	11	2	
Ireland	(n=800)	42	45	3	11	9	-2	33	30	-3	
Italy	(n=810)	19	19	0	4	4	-1	37	29	-8	-
Luxembourg	(n=801)	48	53	5	8	8	0	10	17	7	+
Portugal	(n=800)	16	15	-1	4	2	-1	45	39	-6	-
Switzerland	(n=800)	55	57	2	12	12	0	8	8	0	

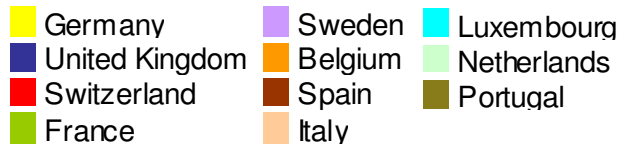


Perception of the country with the best drivers (1/2)

As was the case in 2008, across Europe, Germany was often claimed to be the country with the best drivers. British drivers seem quite proud of their compatriots....

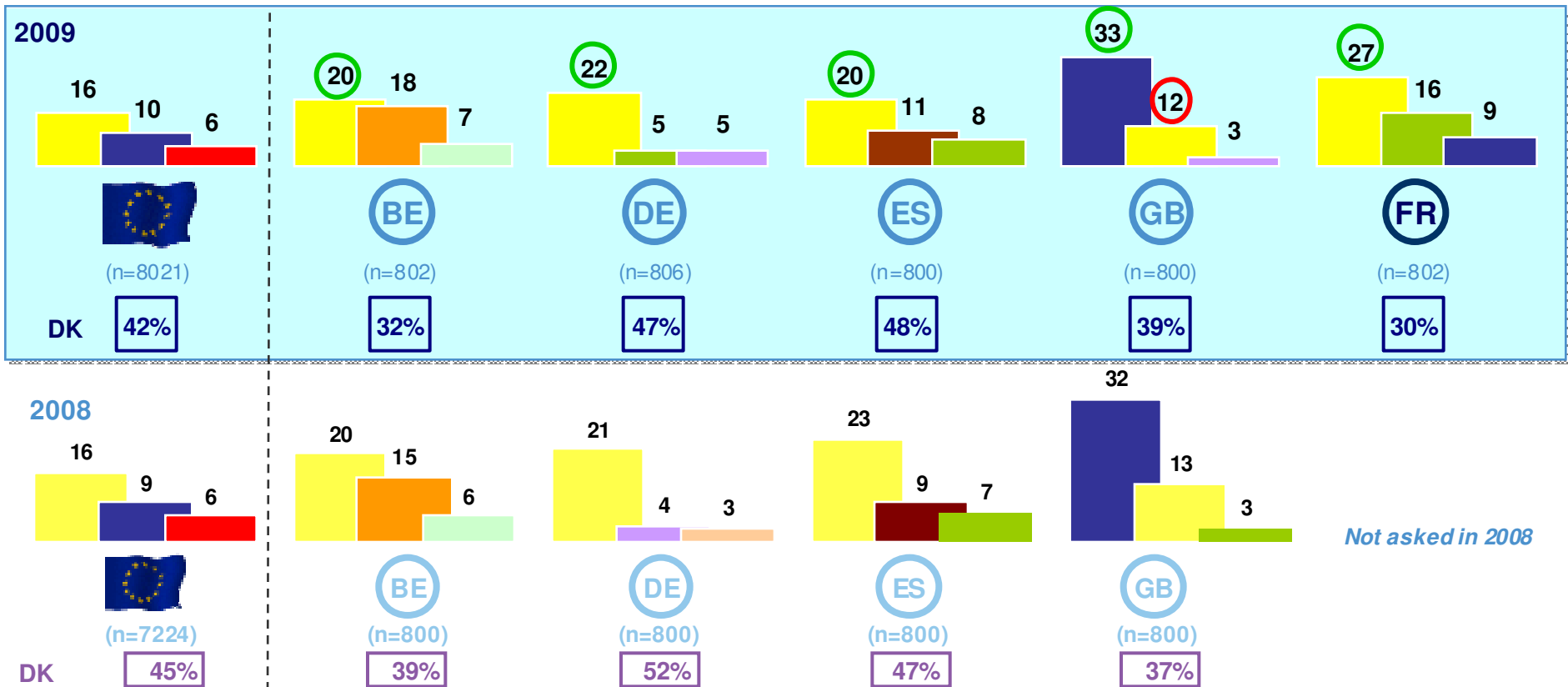
Basis: total sample

Q14. In your opinion, w hich European country has the best drivers? (single answer- Spontaneous answers)



Only the 3 most important or 4 if equality

In %





Perception of the country with the best drivers (2/2)

..... Likewise for the Swiss, Irish and Luxembourgish drivers .

Basis: total sample

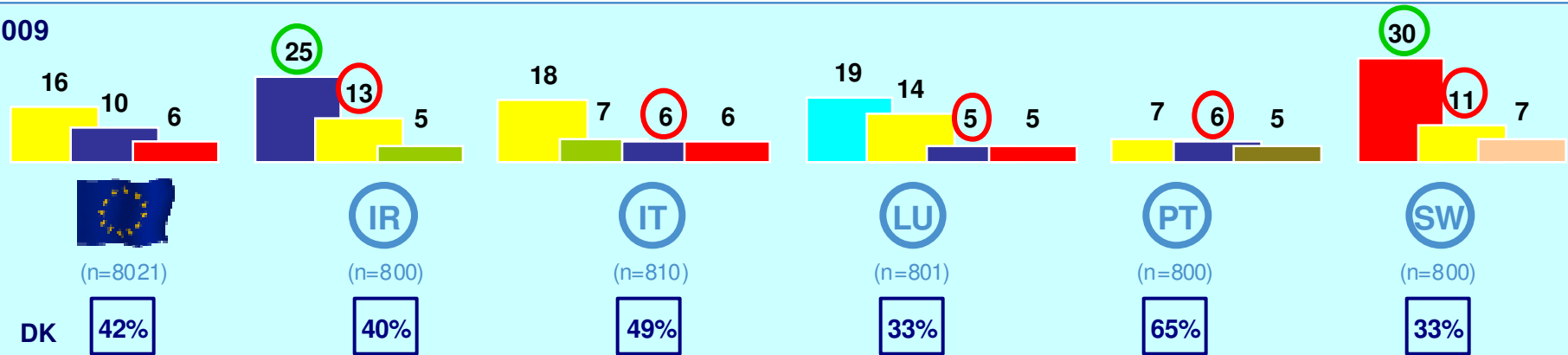
Q14. In your opinion, w hich European country has the best drivers? (single answer- Spontaneous answers)

- Germany
- Sweden
- Luxembourg
- United Kingdom
- Belgium
- Netherlands
- Switzerland
- Spain
- Portugal
- France
- Italy

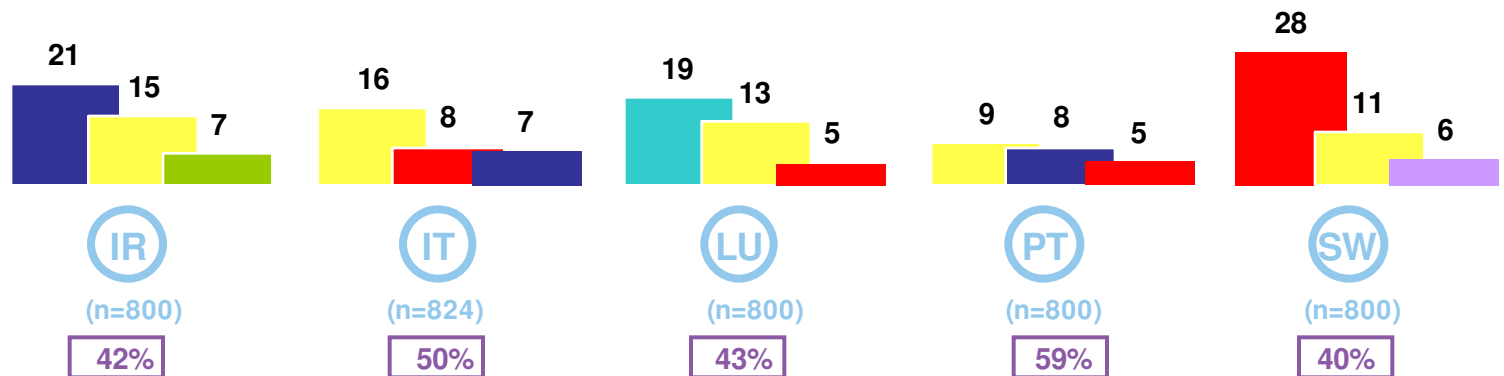
Only the 3 most important or 4 if equality

In %

2009



Wave 2008
















Perception of the country with the best drivers - Ranking 2009 - Top 3

Basis: total sample

Q14. In your opinion, w hich European country has the best drivers? (single answer- Spontaneous answers)

											
Basis : Total sample	(n=8021)	(n=802)	(n=806)	(n=800)	(n=802)	(n=800)	(n=800)	(n=810)	(n=801)	(n=800)	(n=800)
Germany	1	1	1	1	1	2	2	1	2	1	2
ST United Kingdom	2				3	1	1	3	3	2	
Switzerland	3							3	3		1
France			2	3	2		3	2			
Sweden			2			3					
Belgium		2							3		
Spain				2							
Italy											3
Luxembourg									1		
Netherlands		3									
Portugal										3	



Perception of changes in driver behaviour

Like in 2008, nearly 3 drivers out of 10 feel their behaviour has changed over the past year with the strongest changes among the French and the Irish. On the contrary, fewer respondents claimed to have changed in Italy, Germany and Belgium.

Basis: total sample

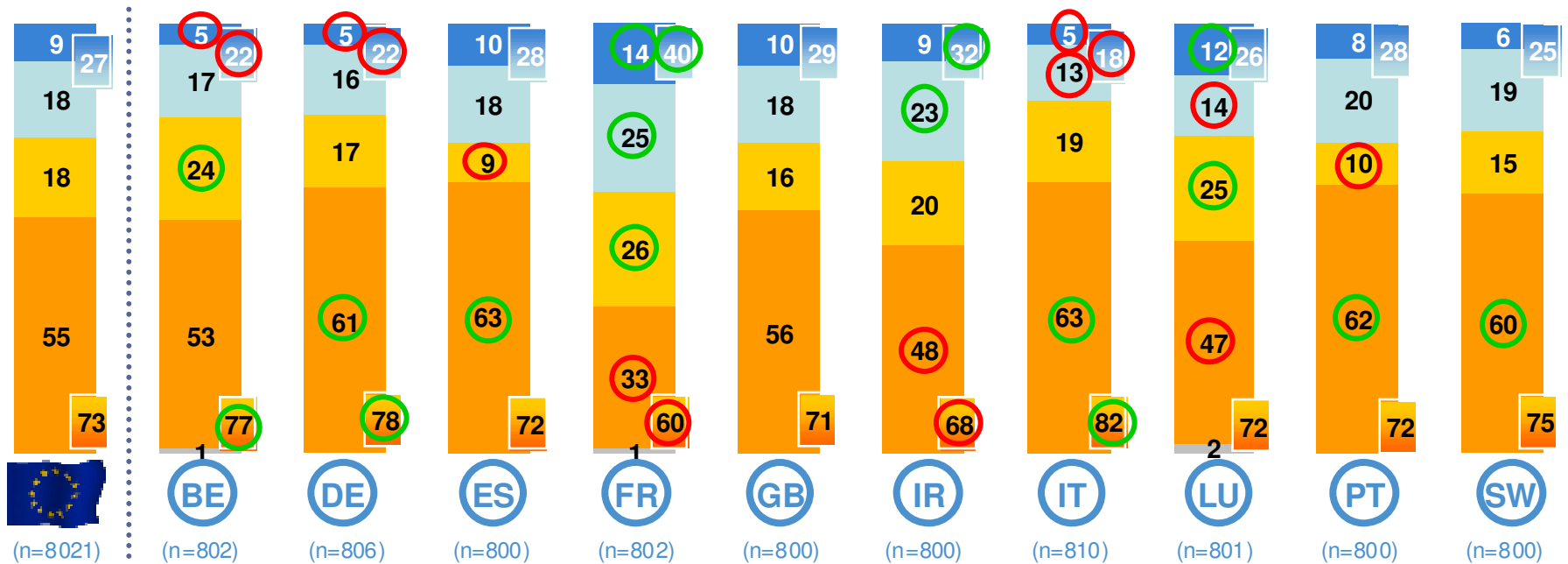
Q10. Do you have the impression that, overall, your behaviour behind the wheel has changed a lot, somewhat, not much or not at all in the last 12 months? (single answer)

- It has changed a lot
- It has changed somewhat
- It has not changed much
- It has not changed at all
- DK

ST Changed a lot / somewhat

In %

ST Not change much / not changed at all





Perception of changes in driver behaviour

In 5 countries out of 10 (Belgium, Germany, Spain, Great Britain and Italy), most drivers claimed that their behaviour has not changed. France is an exception, with significantly more drivers having changed over the past year than in 2008, possibly due to more severity from authorities in relation to roads.

Basis: total sample

Q10. Do you have the impression that, overall, your behaviour behind the wheel has changed a lot, somewhat, not much or not at all in the last 12 months? (single answer)

Basis	ST Changed			It has changed a lot			It has changed somewhat			ST Not changed			It has not changed at all		
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium (n=802)	30	22	-8 -	10	5	-5	20	17	-4	70	77	8 +	52	53	1
Germany (n=806)	28	22	-6 -	6	5	-1	21	16	-5 -	72	78	6 +	58	61	3
Spain (n=800)	33	28	-5 -	12	10	-2	21	18	-2	67	72	5 +	56	63	7 +
France (n=802)	35	40	4	11	14	3	24	25	1	64	60	-5	39	33	-5
Great Britain (n=800)	34	29	-5 -	15	10	-4 -	19	18	-1	66	71	5 +	52	56	4
Ireland (n=800)	37	32	-4 -	14	9	-5 -	22	23	1	63	68	4	46	48	2
Italy (n=810)	25	18	-7	10	5	-5 -	16	13	-2	75	82	7 +	59	63	4
Luxembourg (n=801)	26	26	0	11	12	2	15	14	-1	74	72	-2	46	47	0
Portugal (n=800)	26	28	2	6	8	2	20	20	0	74	72	-2	68	62	-6 -
Switzerland (n=800)	28	25	-3	10	6	-4 -	18	19	0	71	75	4	53	60	7 +










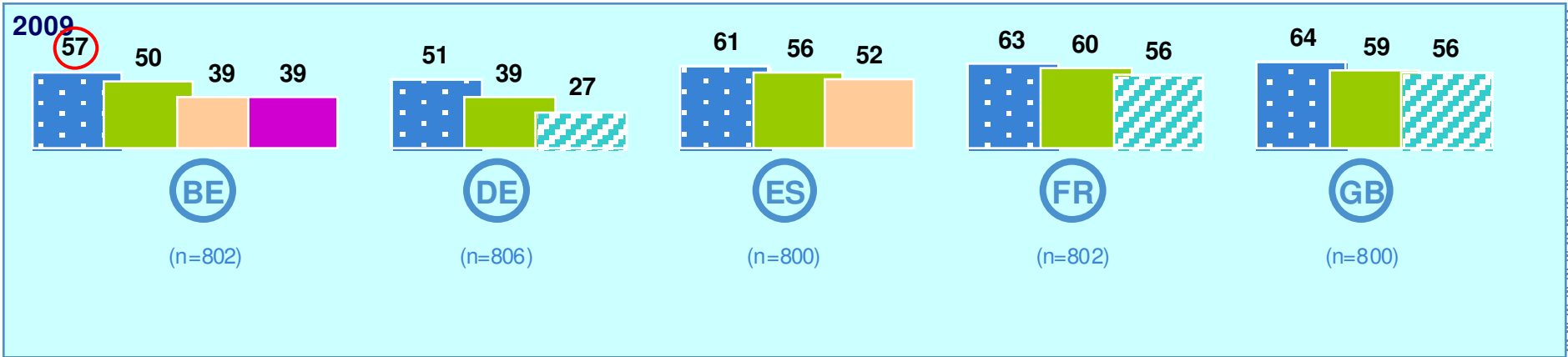
Elements influencing road behaviour - Top 3 per country -

(1/2) Across countries, awareness of the dangers of the road (first reason in 2008 also) and the installation of speed cameras on roads are the two main factors that have influenced driving behaviours.....

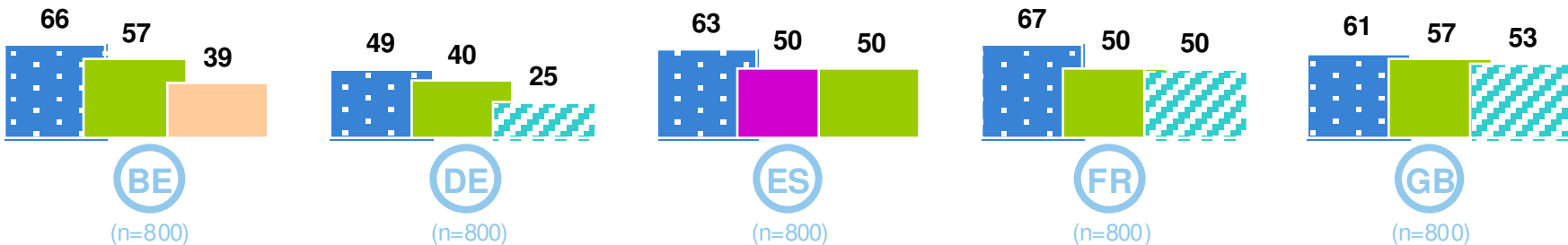
Basis: total sample

Q11. For each of the items I am about to mention, please tell me to what extent it has influenced your driving behaviour over the last 12 months: a lot, some, very little or not at all? (single answer per item)

-  Awareness of the dangers of the road
 -  The possibility of losing points on your driving licence
 -  Installation of speed cameras on roads
 -  Stricter law enforcement on the roadways
 -  Prevention campaigns
 -  Involvement in a car crash of someone you know
 -  Personal involvement in a car crash
- only the 3 most important or 4 if equality**
% A lot + some



Wave 2008





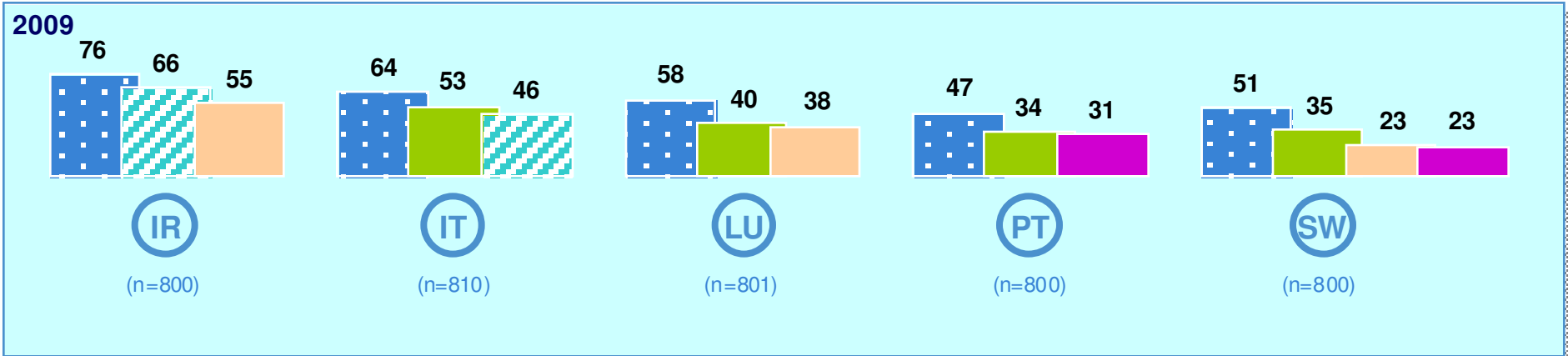
Elements influencing road behaviour - Top 3 per country –

(2/2) ... except for Ireland where the second reason for change is the fear of getting penalty points on the driving licence.

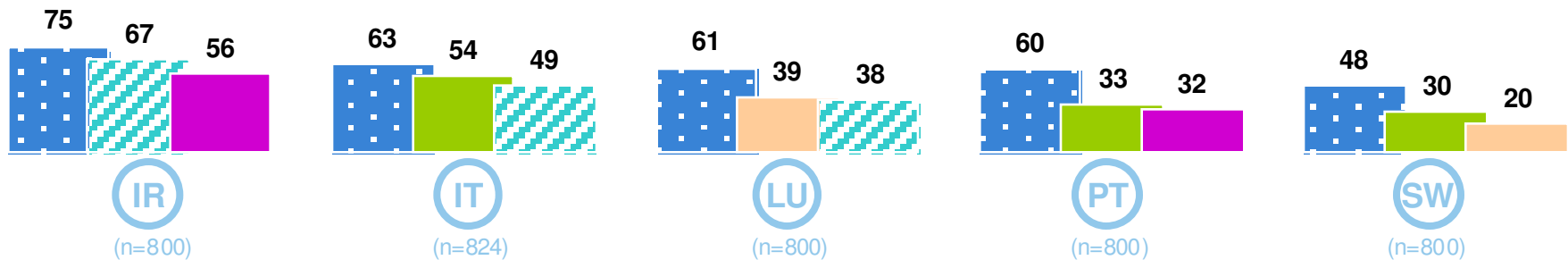
Basis: total sample

Q11. For each of the items I am about to mention, please tell me to what extent it has influenced your driving behaviour over the last 12 months: a lot, some, very little or not at all? (single answer per item)

- Awareness of the dangers of the road
 - Prevention campaigns
 - The possibility of losing points on your driving licence
 - Involvement in a car crash of someone you know
 - Installation of speed cameras on roads
 - Personal involvement in a car crash
 - Stricter law enforcement on the roadways
- only the 3 most important or 4 if equality**
- % A lot + some**



Wave 2008





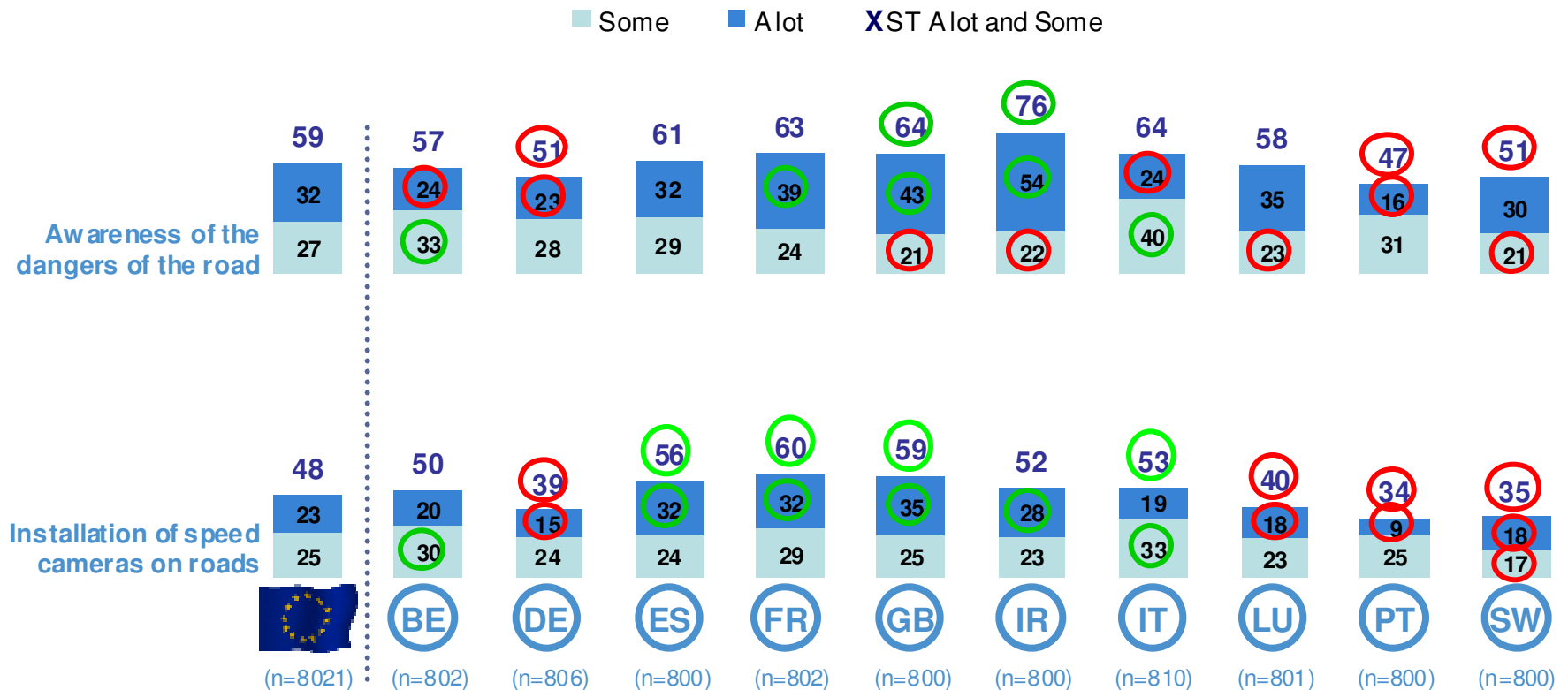
Elements influencing road behaviour (1/3)

Awareness of road dangers greatly influences the English-speaking countries but has had less effect in Portugal, Switzerland and Germany. Speed cameras have had a high impact on French, British, Spanish and Italian drivers.

Basis: total sample

Q11. For each of the items I am about to mention, please tell me to what extent it has influenced your driving behaviour over the last 12 months: a lot, some, very little or not at all? (single answer per item)

In %





Elements influencing road behaviour (2/3)

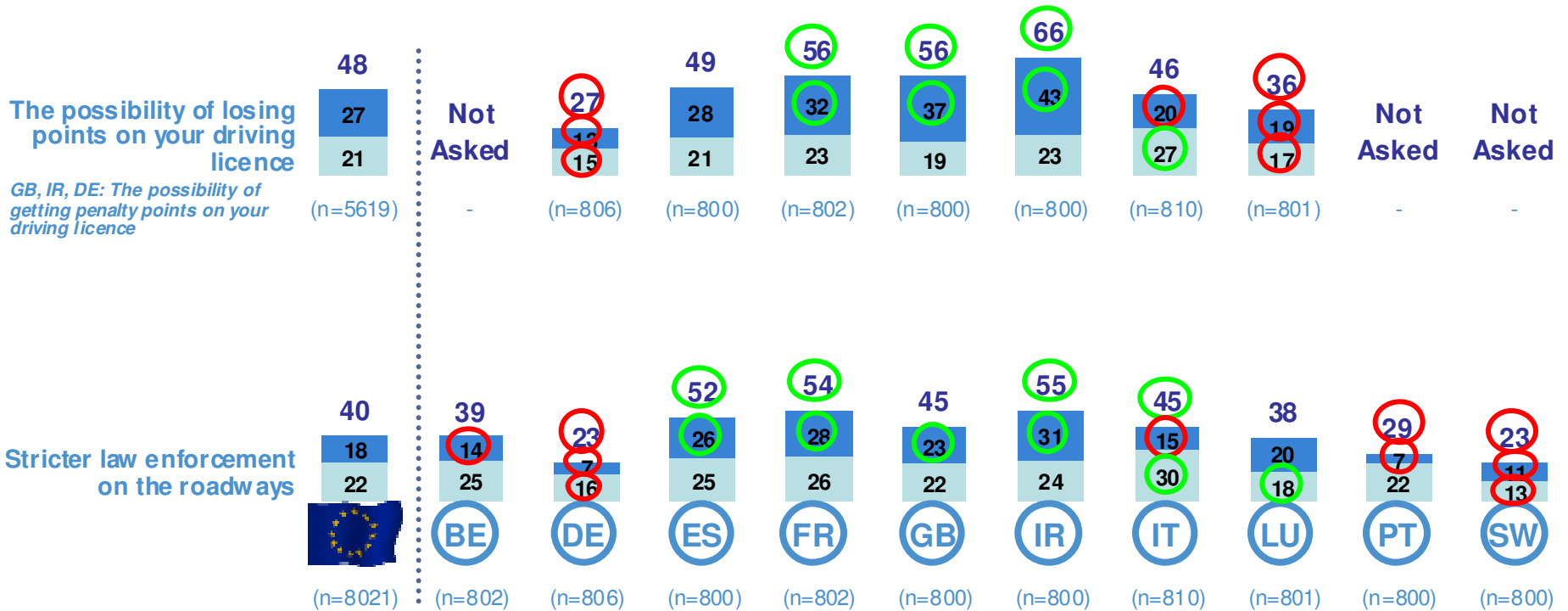
Irish, British and French drivers have been particularly influenced by the possibility of their driving licence being impacted. Stricter law enforcement has been effective on Irish, French, Spanish and Italian drivers.

Basis: total sample

Q11. For each of the items I am about to mention, please tell me to what extent it has influenced your driving behaviour over the last 12 months: a lot, some, very little or not at all? (single answer per item)

In %

■ Some ■ A lot X ST A lot and Some



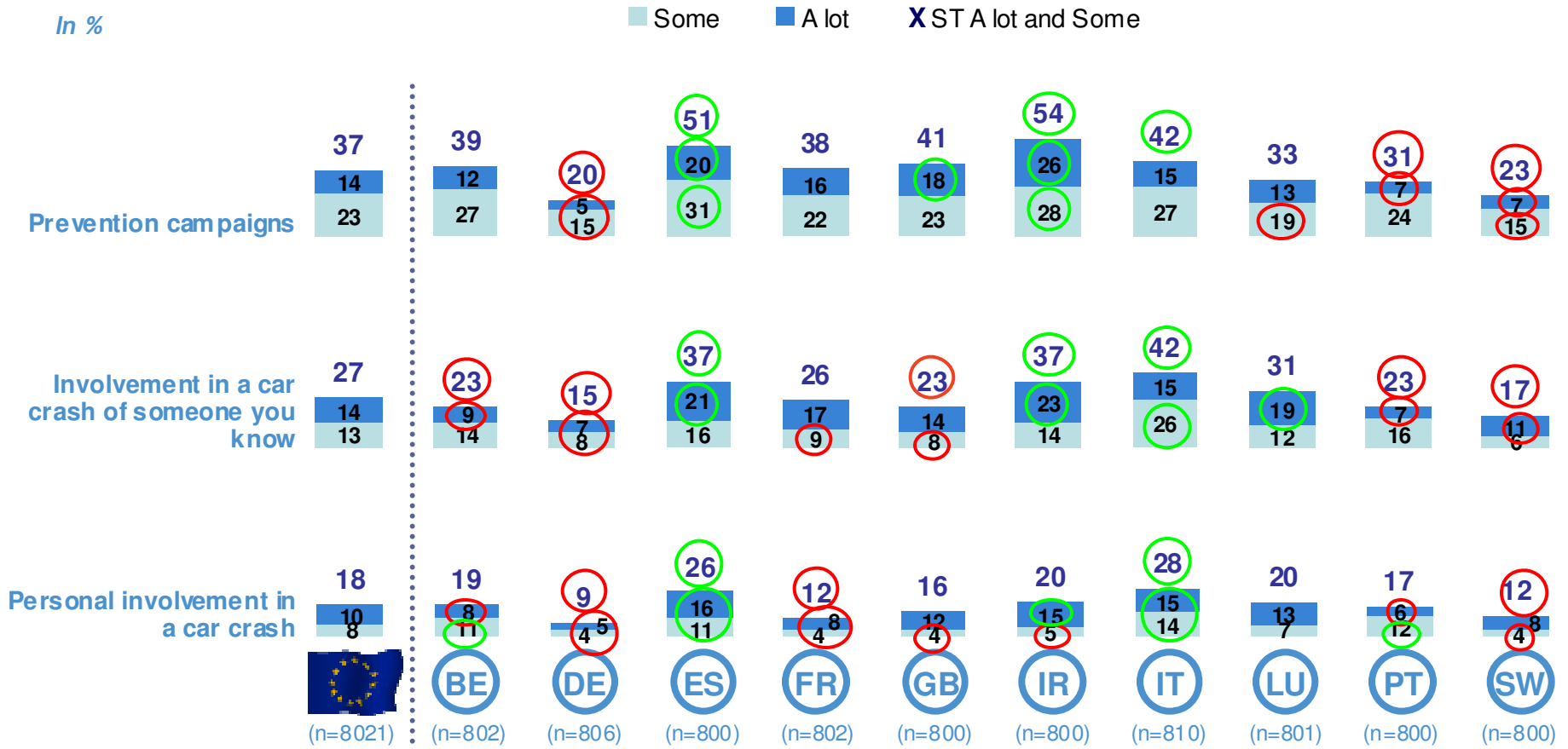


Elements influencing road behaviour (3/3)

Prevention campaigns affected drivers in Ireland, Spain and Italy but had a poor impact in Germany, Switzerland and Portugal. The impact of a car crash (personal or family or acquaintance) was most important in Italy and Spain.

Basis: total sample

Q11. For each of the items I am about to mention, please tell me to what extent it has influenced your driving behaviour over the last 12 months: a lot, some, very little or not at all? (single answer per item)





Elements influencing road behaviour

Ranking 2009

Basis: total sample

Q11. For each of the items I am about to mention, please tell me to what extent it has influenced your driving behaviour over the last 12 months: a lot, some, very little or not at all? (*single answer per item*)

% A lot + some

	 (n=8021)	 (n=802)	 (n=806)	 (n=800)	 (n=802)	 (n=800)	 (n=800)	 (n=810)	 (n=801)	 (n=800)	 (n=800)
Awareness of the dangers of the road	1	1	1	1	1	1	1	1	1	1	1
Installation of speed cameras on roads	3	2	2	2	2	2	5	2	2	2	2
The possibility of losing points/ getting penalty points	2	Not asked	3	5	3	3	2	3	4	Not asked	Not asked
Stricter law enforcement on the roadways	4	3	4	3	4	4	3	4	3	4	3
Prevention campaigns	5	4	5	4	5	5	4	5	5	3	4
Involvement in a car crash of someone you know	6	5	6	6	6	6	6	6	6	5	5
Personal involvement in a car crash	7	6	7	7	7	7	7	7	7	6	6



B. In-depth Findings

2 – European drivers' behaviour

- Behaviours considered dangerous
- Stated behaviours
- Offence recording



Behaviours considered dangerous behind the wheel

Top 3 per country - (1/2)

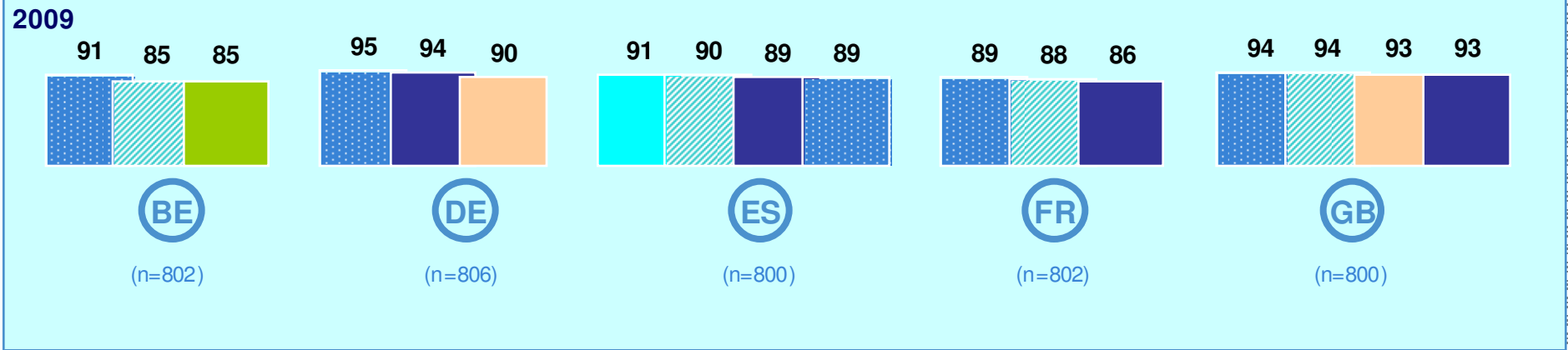
In most countries, the behaviour considered most dangerous is disrespecting safety distances, except in Spain where it is crossing a white line.

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

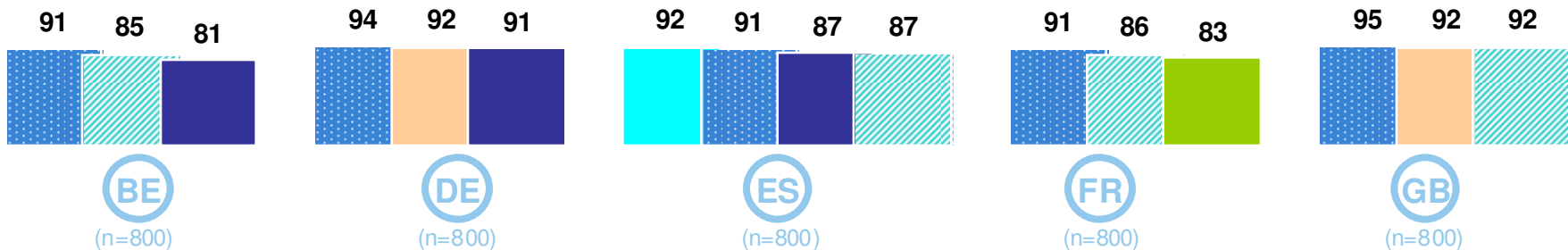
- Driving fast just a few metres behind the car in front of you
- Driving without wearing a seatbelt
- Answering the phone without a hands free kit
- Overtaking or turning without signalling
- Overtaking on the right on a freeway.
- Getting behind the wheel of a car after more than two alcoholic drinks
- Crossing a white line/solid or double white/ to pass the car ahead
- Driving 65 km/hour within city limits
- Driving between...on a freeway/motorway
- Going through an amber light
- Driving more than 2 hours in a row without taking a break *New item in 2009*

% it is dangerous in and of itself



Wave 2008

Warning ! List not exactly the same as in 2008 and 2009





Behaviours considered dangerous behind the wheel

Top 3 per country - (2/2)

... and Luxembourg where it is not wearing a seatbelt.

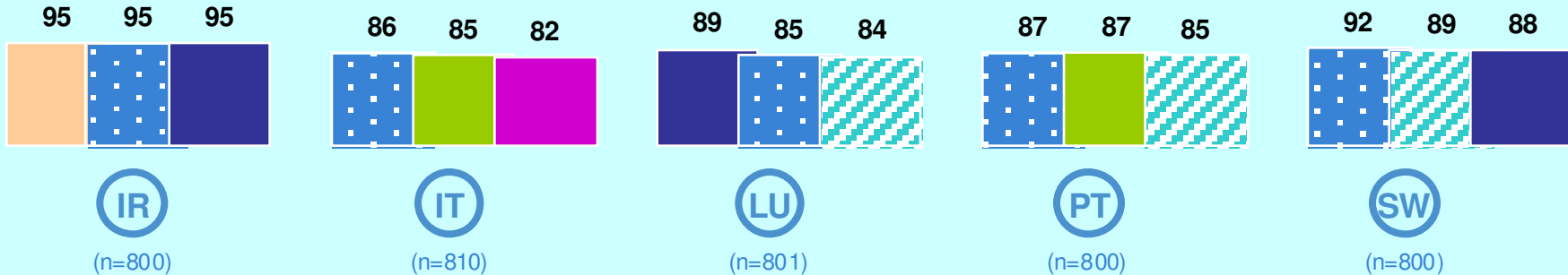
Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

- Driving fast just a few metres behind the car in front of you
- Driving without wearing a seatbelt
- Answering the phone without a hands free kit
- Overtaking or turning without signalling
- Overtaking on the right on a freeway.
- Getting behind the wheel of a car after more than two alcoholic drinks
- Crossing a white line/solid or double white/ to pass the car ahead
- Driving 65 km/hour within city limits
- Driving between...on a freeway/motorway
- Going through an amber light
- Driving more than 2 hours in a row without taking a break *New item in 2009*

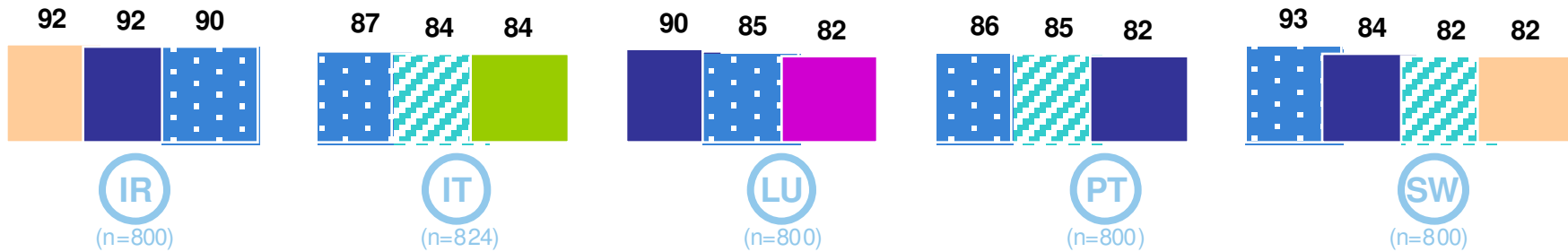
% it is dangerous in and of itself

2009



Wave 2008

Warning ! List not exactly the same in 2008 and 2009



only the 3 most important or 4 if equality
AXA Road Behaviour Survey across Europe - 2009



Behaviours considered dangerous behind the wheel (1/6)

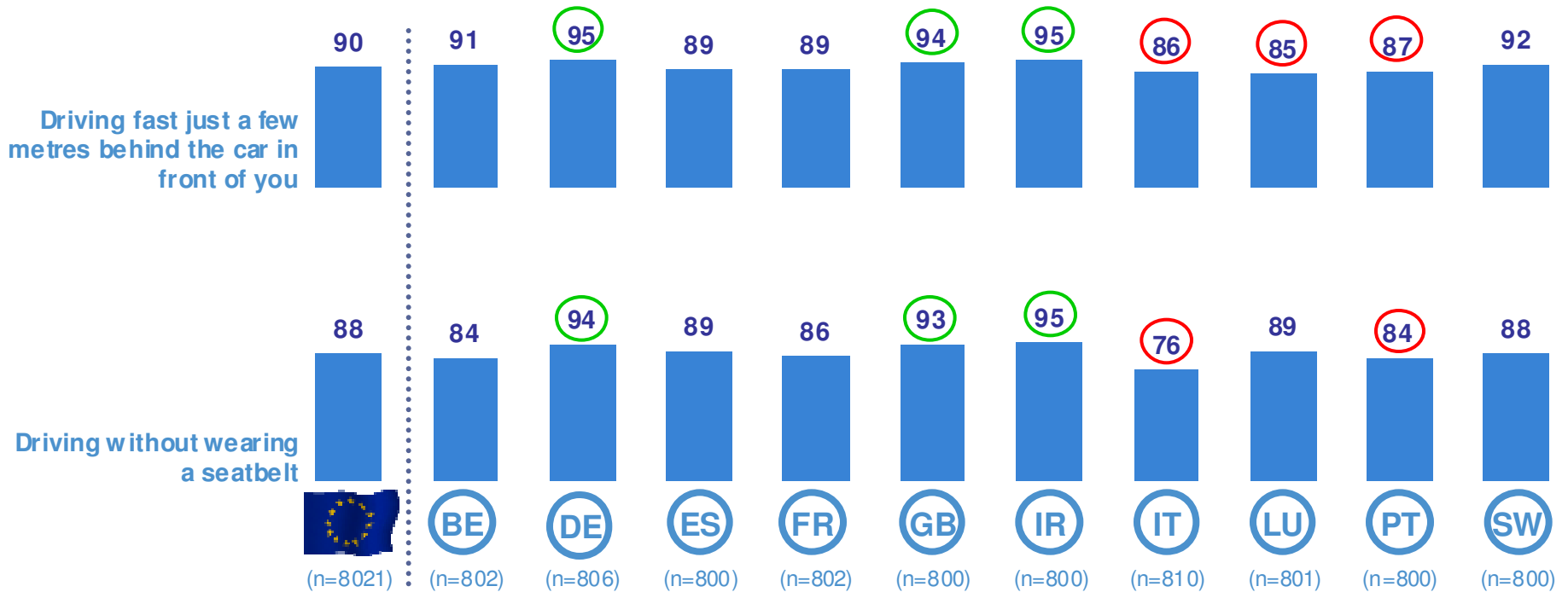
German, British and Irish drivers are more concerned about disrespecting safety distances and driving without wearing a seatbelt than the European average (notably compared to Italy and Portugal).

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

In %

% it is dangerous in and of itself



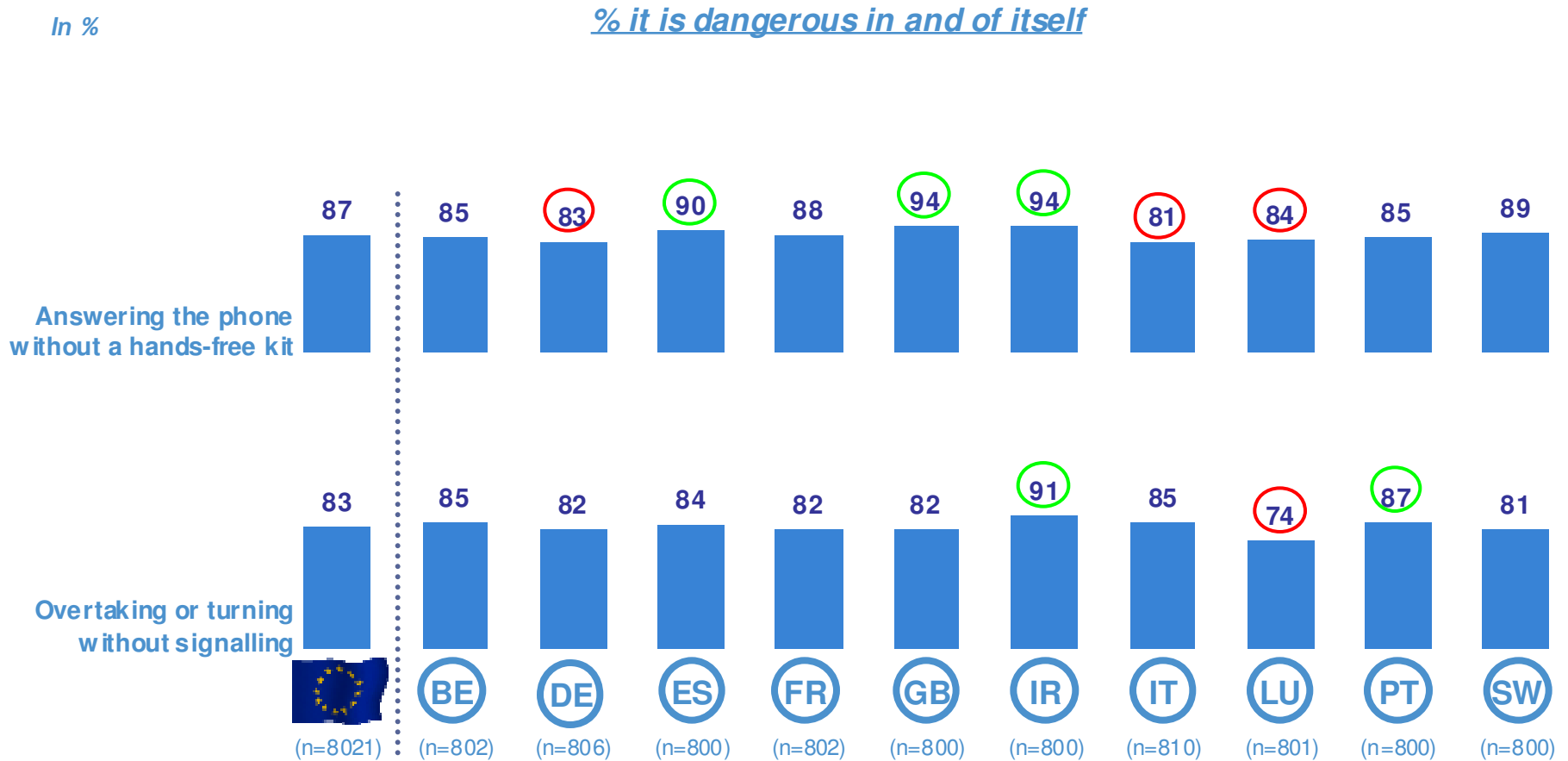


Behaviours considered dangerous behind the wheel (2/6)

Answering the phone without a hands-free kit is also a major concern in Europe, especially for British, Irish and Spanish drivers. Irish and Portuguese drivers are more sensitive than the European average to the danger of turning without signalling.

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)





Behaviours considered dangerous behind the wheel (3/6)

Overtaking on the right is perceived as more dangerous in Germany than in other countries and in particular in Great Britain (overtaking on the left in this case) and Portugal.

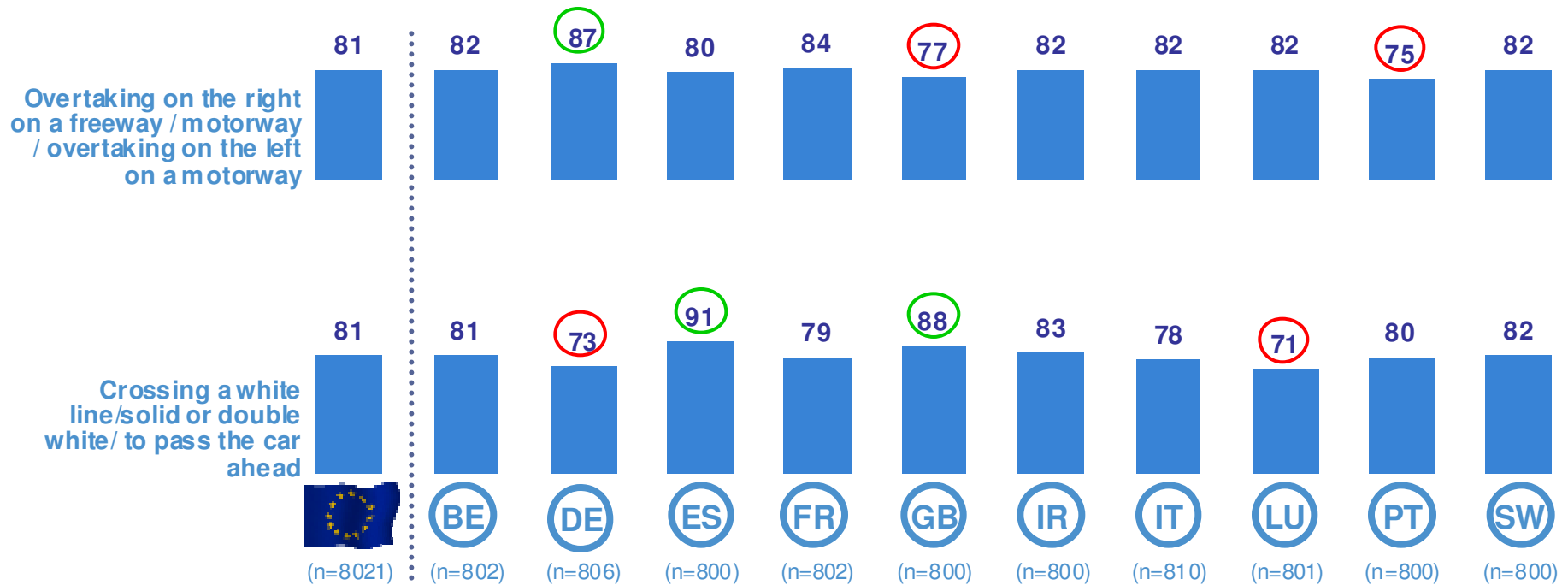
Spanish and British drivers are the most concerned about the danger of crossing a white line.

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

In %

% it is dangerous in and of itself





Behaviours considered dangerous behind the wheel (4/6)

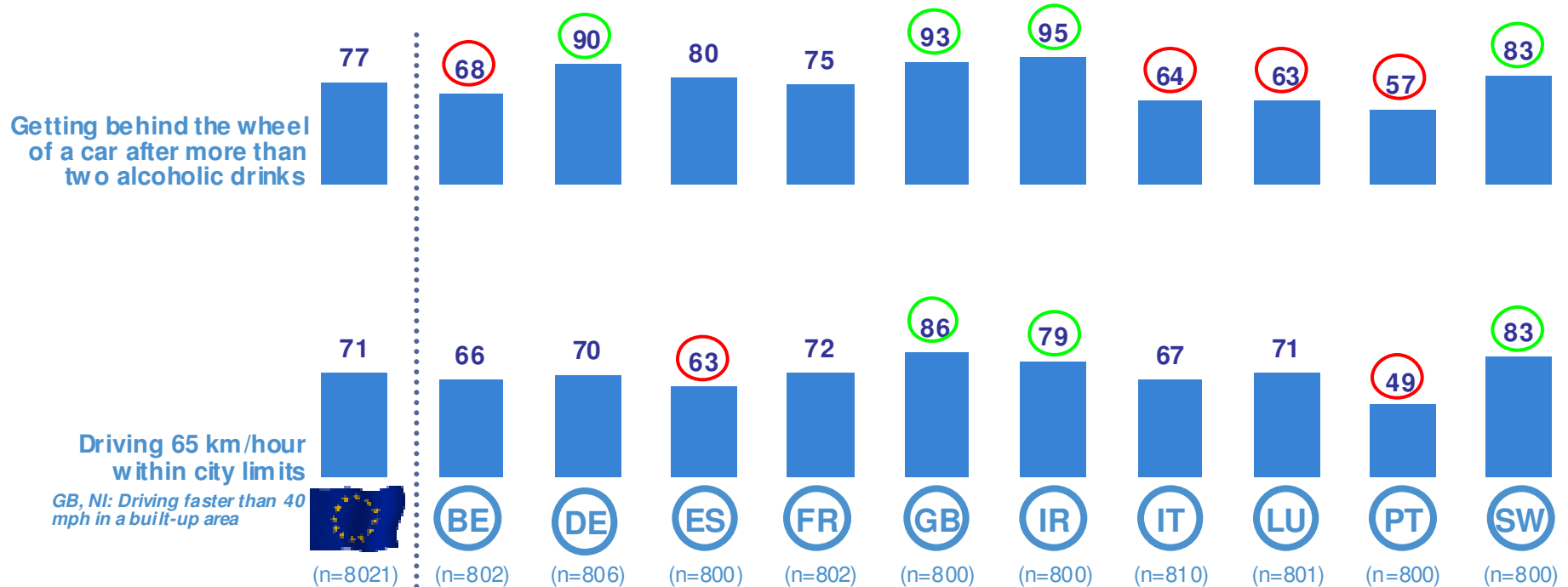
The countries least aware of the dangers of drinking and driving are Portugal, Luxembourg, Italy, and Belgium. Speeding within city limits is dangerous for Anglo-Saxon and Swiss drivers, while the Portuguese are the least conscious of this danger.

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

In %

% it is dangerous in and of itself



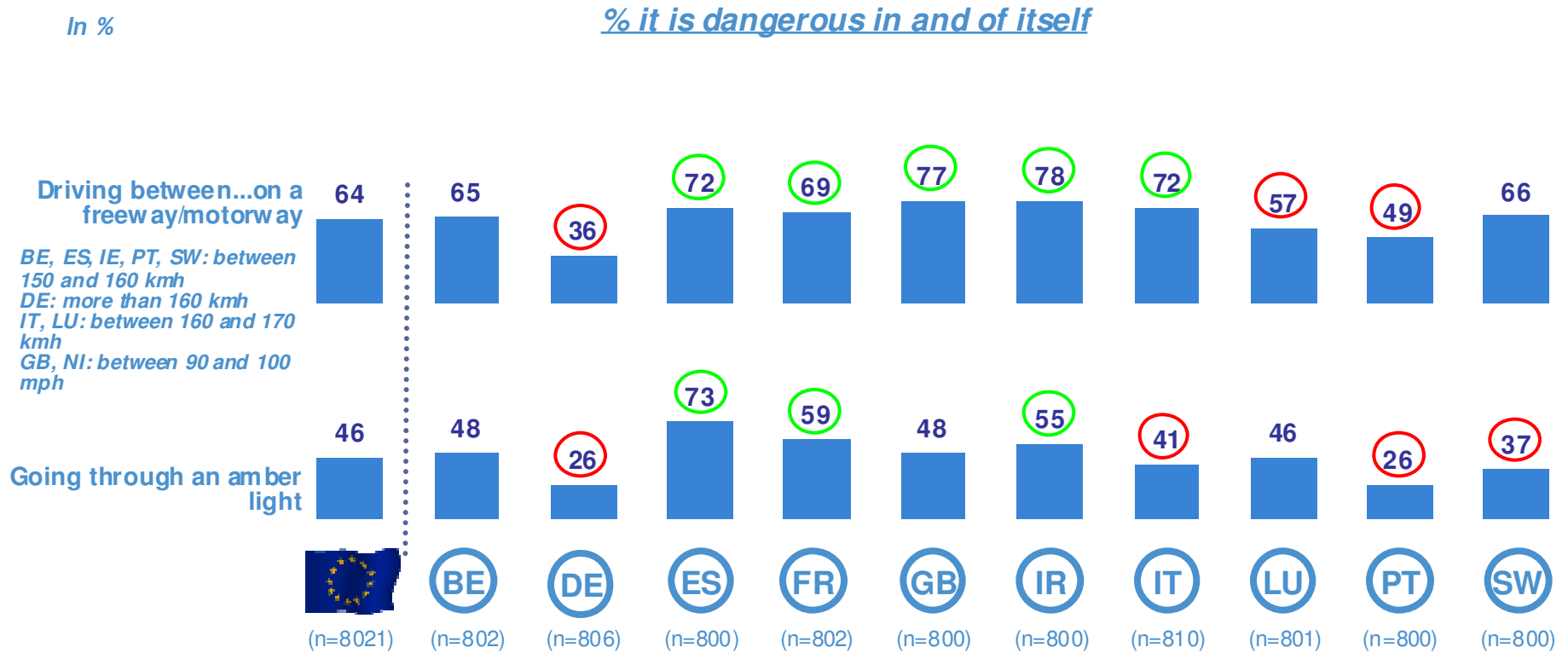


Behaviours considered dangerous behind the wheel (5/6)

The drivers most unaware of speed on motorways are the Germans (but this is not an offence for them), followed by the Portuguese and Luxembourgers. The Germans, Portuguese, Swiss and Italians are more unaware than the European average of the danger of going through an amber light. However, it is an offence in all countries except Germany.

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)





Behaviours considered dangerous behind the wheel (6/6)

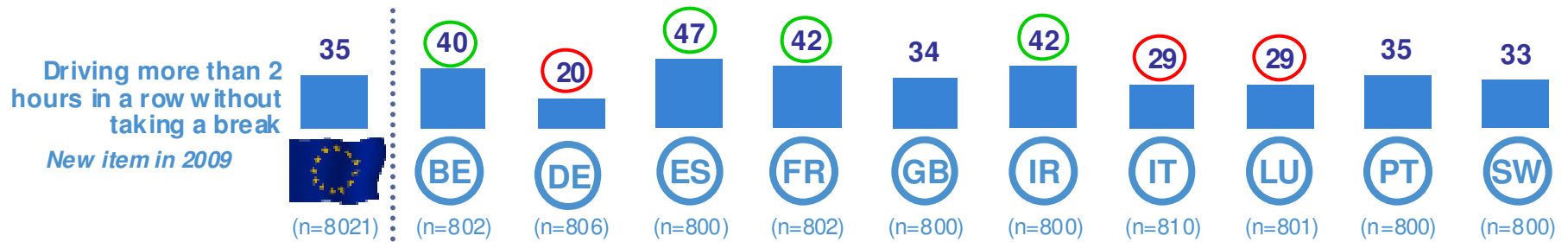
The Germans, Italians and Luxembourgers are also particularly insensitive to the importance of a break after more than 2 hours of driving.

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

In %

% it is dangerous in and of itself
















Behaviours considered dangerous behind the wheel - Ranking 2009

Basis: total sample

Q6. For each one of the following behaviours, please indicate if you think it is dangerous in and of itself or it may be dangerous depending on the driver or the situation. (single answer per item)

% it is dangerous in and of itself

Basis : Total sample	  (n=802)  (n=806)  (n=800)  (n=802)  (n=800)  (n=800)  (n=810)  (n=801)  (n=800)  (n=800)										
	Driving fast just a few metres behind the car in front of you	1	1	1	3	1	1	1	1	2	1
Driving without wearing a seatbelt	2	4	2	3	3	3	1	6	1	4	3
Answering the phone without a hands free kit	3	2	5	2	2	1	4	4	3	3	2
Overtaking or turning without signalling	4	2	6	5	5	7	5	2	5	1	8
Overtaking on the right on a freeway / motorway / overtaking on the left on a motorway	5	5	4	6	4	8	7	3	4	6	6
Crossing a white line/solid or double white/ to pass the car ahead	5	6	7	1	6	5	6	5	6	5	6
Getting behind the wheel of a car after more than two alcoholic drinks	7	7	3	6	7	3	1	9	8	7	4
Driving 65 km/hour within city limits / faster than 40 mph in a built-up area	8	8	8	10	8	6	8	8	6	8	4
Driving between...on a freeway/motorway	9	9	9	9	9	8	9	7	9	8	9
Going through an amber light	10	10	10	8	10	10	10	10	10	11	10
Driving more than 2 hours in a row without taking a break	11	11	11	11	11	11	11	11	11	10	11

BE, ES, IE, PT, SW: between 150 and 160 kmh
 DE: more than 160 kmh
 IT, LU,FR: between 160 and 170 kmh
 GB, NI: between 90 and 100 mph





Stated behaviours behind the wheel

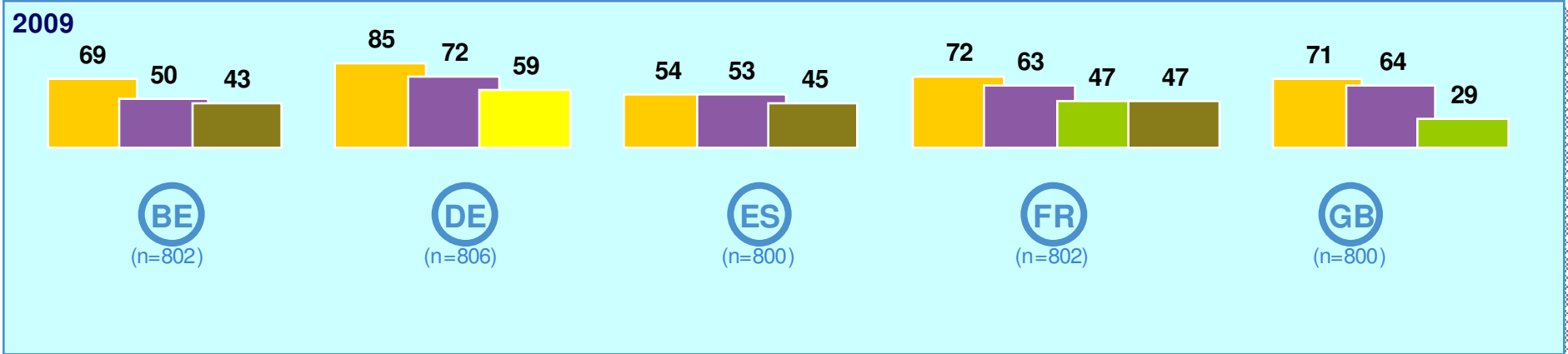
Top 3 per country (1/2) - In accordance with the behaviours considered the least dangerous, the two bad behaviours most admitted to by European drivers are Going through an amber light and driving more than 2 hours without a break...

Basis: total sample

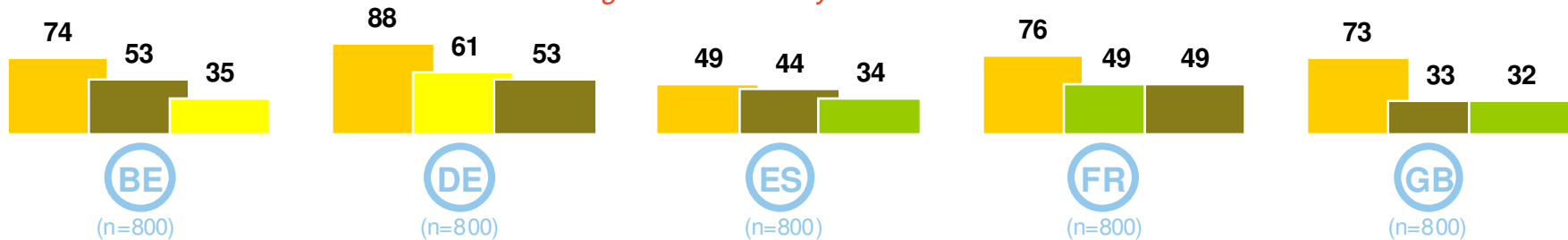
Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

- Driving fast just a few metres behind the car in front of you
- Crossing a white line/solid or double white/ to pass the car ahead
- Driving without wearing a seatbelt
- Driving 65 km/hour within city limits
- Answering the phone without a hands free kit
- Driving between...on a freeway/motorway
- Overtaking or turning without signalling
- Going through an amber light
- Overtaking on the right on a freeway...
- Driving more than 2 hours in a row without taking a break *New item in 2009*
- Getting behind the wheel of a car after more than two alcoholic drinks

% Very often + often + sometimes



Warning ! List not exactly the same in 2008 and 2009





Stated behaviours behind the wheel

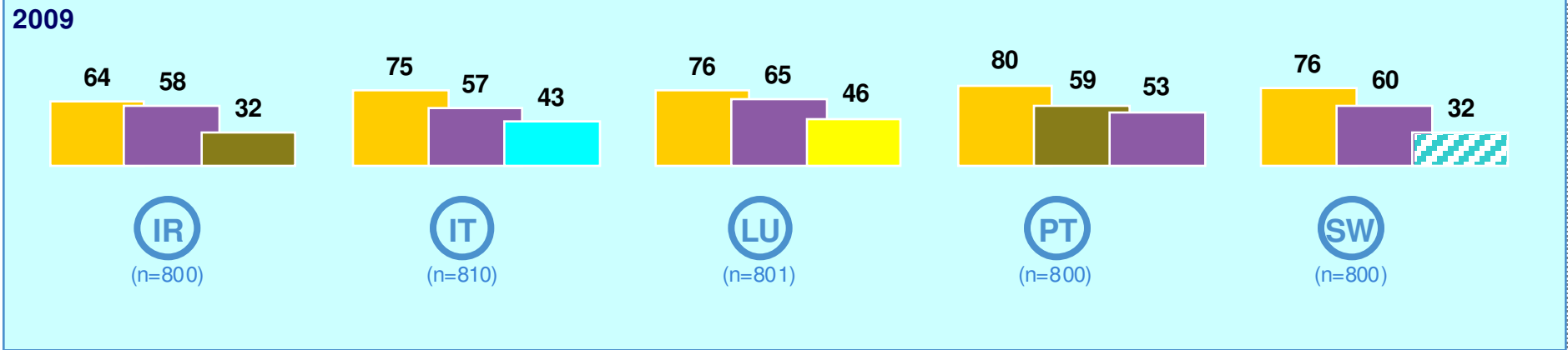
Top 3 per country (2/2) ... except in Portugal, where speeding within city limits is the second most common behaviour that they acknowledge engaging in.

Basis: total sample

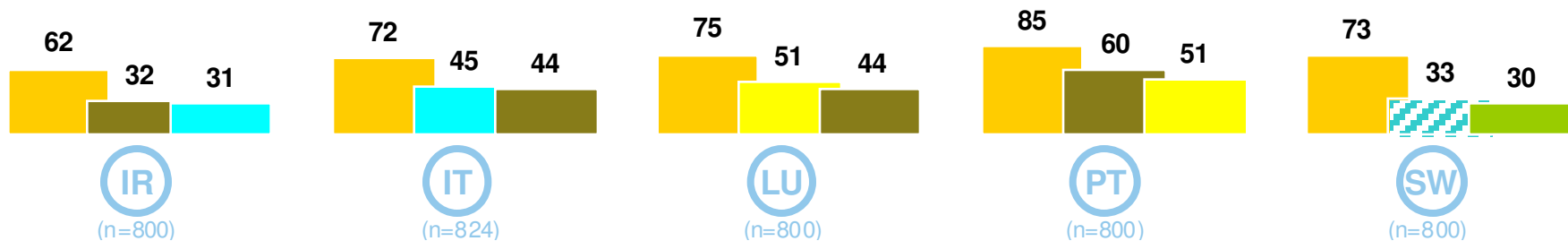
Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

- Driving fast just a few metres behind the car in front of you
- Driving without wearing a seatbelt
- Answering the phone without a hands free kit
- Overtaking or turning without signalling
- Overtaking on the right on a freeway...
- Getting behind the wheel of a car after more than two alcoholic drinks
- Crossing a white line/solid or double white/ to pass the car ahead
- Driving 65 km/hour within city limits
- Driving between...on a freeway/motorway
- Going through an amber light
- Driving more than 2 hours in a row without taking a break *New item in 2009*

% Very often + often + sometimes



Warning ! List not exactly the same in 2008 and 2009





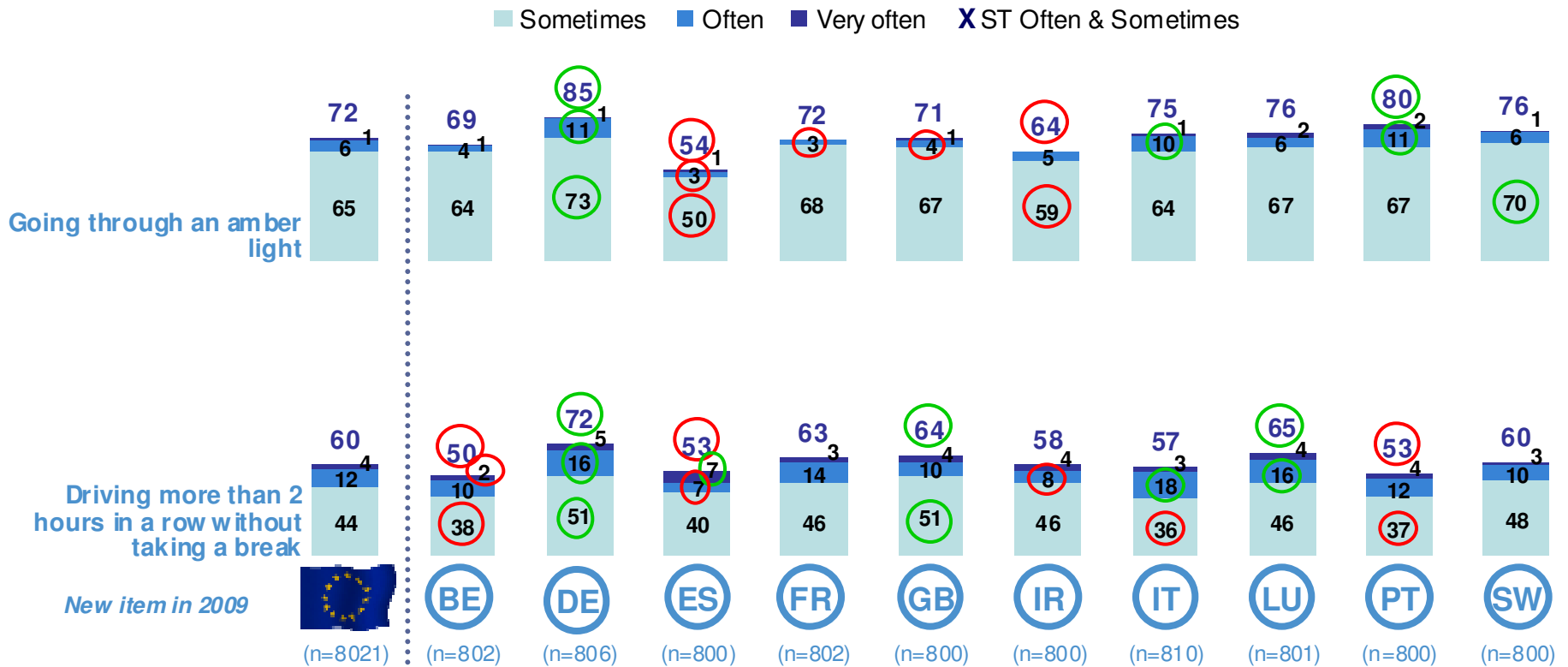
Stated behaviours behind the wheel (1/5)

Spanish and Irish drivers are the least likely to go through an amber light.
 Across Europe, the Germans, Luxembourgers and British are the most likely to drive more than 2 hours without a break.

Basis: total sample

Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

In %





Stated behaviours behind the wheel (2/5)

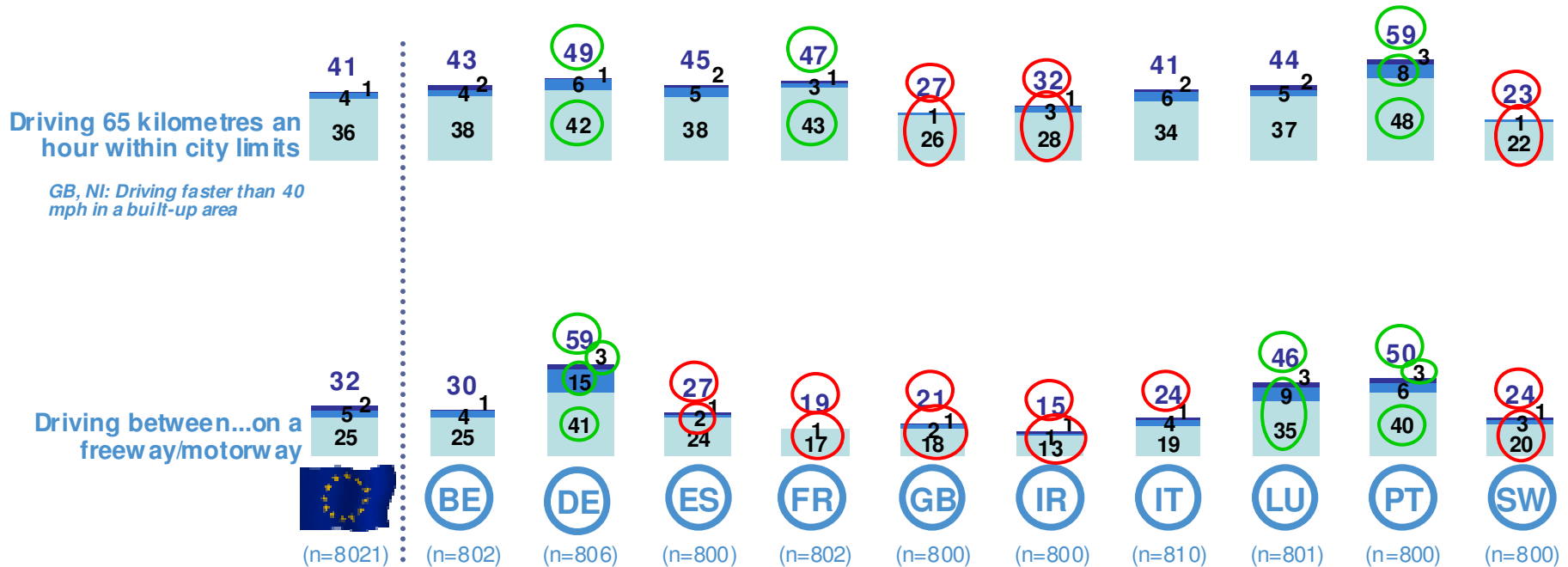
Of all European drivers, the Portuguese and Germans exceed speed limits the most (in the city or on highways). Speeding in cities is also less respected by the French, the same applies on highways for Luxembourgers.

Basis: total sample

Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

In %

■ Sometimes ■ Often ■ Very often X ST Often & Sometimes



GB, NI: Driving faster than 40 mph in a built-up area

BE, ES, IE, PT, SW: between 150 and 160 kmh

DE: more than 160 kmh

IT, LU, FR: between 160 and 170 kmh

GB, NI: between 90 and 100 mph





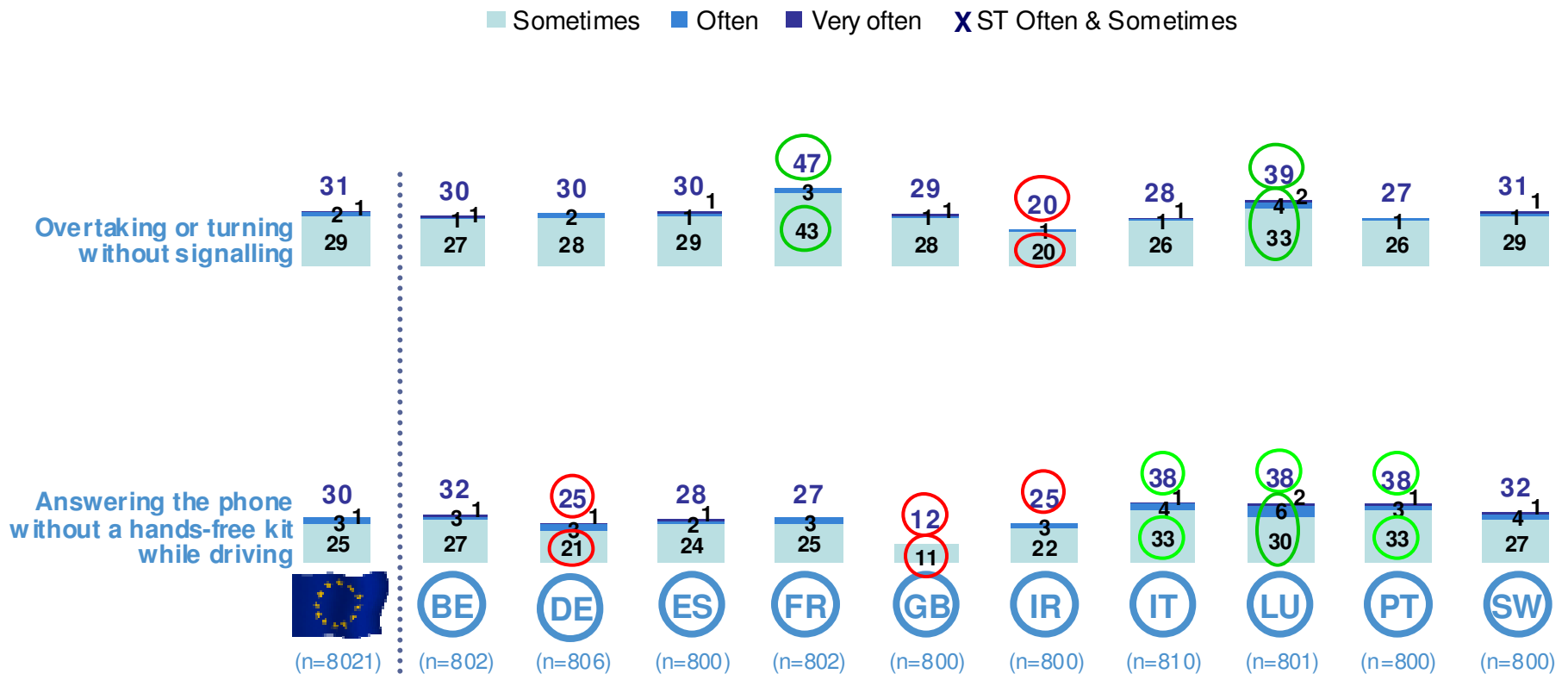
Stated behaviours behind the wheel (3/5)

Regarding turning without signalling, behaviours are similar across Europe, except in France and Luxembourg where drivers do this more often than the European average. Countries with the highest rates of drivers using a mobile phone without a hands-free kit are Italy, Luxembourg and Portugal.

Basis: total sample

Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

In %





Stated behaviours behind the wheel (4/5)

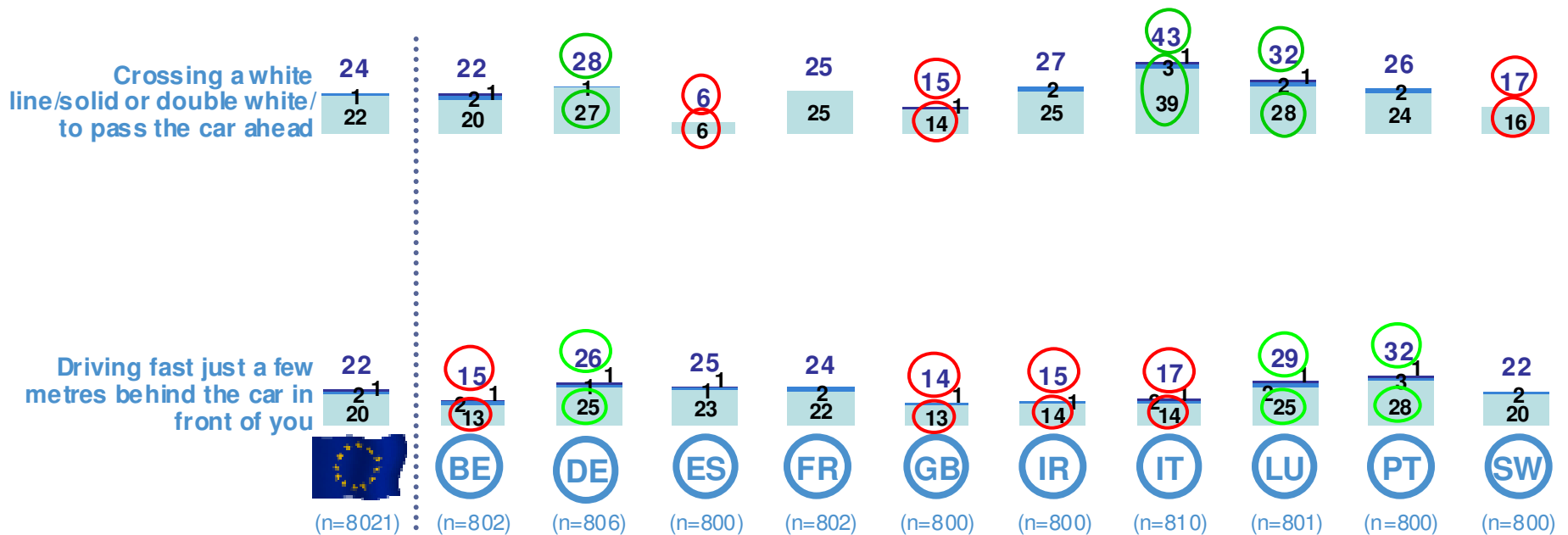
Spanish, British and Swiss drivers are particularly careful about crossing a white line while many Italians do this at least sometimes. Few European drivers admit to disrespecting safety distances but a larger number of Portuguese, Luxembourgish and Germans acknowledge doing it.

Basis: total sample

Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

In %

■ Sometimes ■ Often ■ Very often X ST Often & Sometimes





Stated behaviours behind the wheel (5/5)

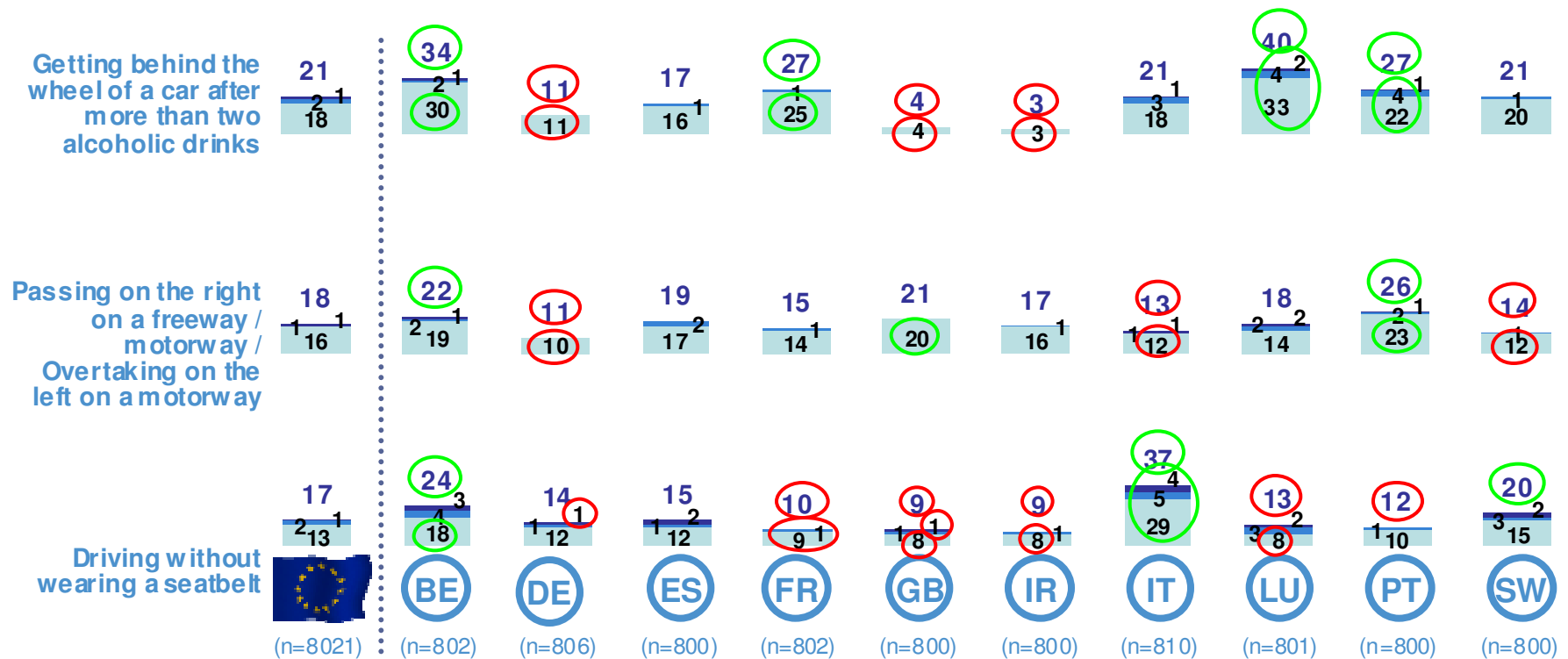
In Luxembourg, Belgium, France and Portugal, drinking and driving is more frequent than the European average, whereas the Anglo-Saxon countries are particularly cautious. The Italians are most likely to admit to not wearing a seatbelt, followed by the Belgians and Swiss.

Basis: total sample

Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

In %

■ Sometimes ■ Often ■ Very often X ST Often & Sometimes





Stated behaviours behind the wheel

Ranking 2009

Basis: total sample

Q7. Speaking for yourself, do you engage in any of the following behaviours very often, often, sometimes or never? (single answer per item)

% Very often + often + sometimes

	 (n=8021)	 (n=802)	 (n=806)	 (n=800)	 (n=802)	 (n=800)	 (n=800)	 (n=810)	 (n=801)	 (n=800)	 (n=800)
Going through an amber light	1	1	1	1	1	1	1	1	1	1	1
Driving more than 2 hours in a row without taking a break	2	2	2	2	2	2	2	2	2	3	2
Driving 65 kilometres an hour within city limits/ faster than 40 mph in a built-up area	3	3	4	3	3	4	3	4	4	2	6
Driving between...on a freeway/motorway	4	6	3	6	9	5	8	8	3	4	5
Overtaking or turning without signalling	5	6	5	4	3	3	6	7	6	7	4
Answering the phone without a hands free kit while driving	6	5	8	5	5	9	5	5	7	5	3
Crossing a white line/solid or double white/ to pass the car ahead	7	9	6	11	7	7	4	3	8	9	10
Driving fast just a few metres behind the car in front of you	8	11	7	7	8	8	8	10	9	6	7
Getting behind the wheel of a car after more than two alcoholic drinks	9	4	10	9	5	11	11	9	5	7	8
Passing on the right on a freeway / motorway / Overtaking on the left on a motorway	10	9	10	8	10	5	7	11	10	9	11
Driving without wearing a seatbelt	11	8	9	10	11	10	10	6	11	11	9

BE, ES, IE, PT, SW: between 150 and 160 kmh

DE: more than 160 kmh

IT, LU, FR: between 160 and 170 kmh

GB, NI: between 90 and 100 mph





Fines and driving licence status

Switzerland and Germany are the two countries where drivers are most heavily fined, whereas the Anglo-Saxons are least fined.

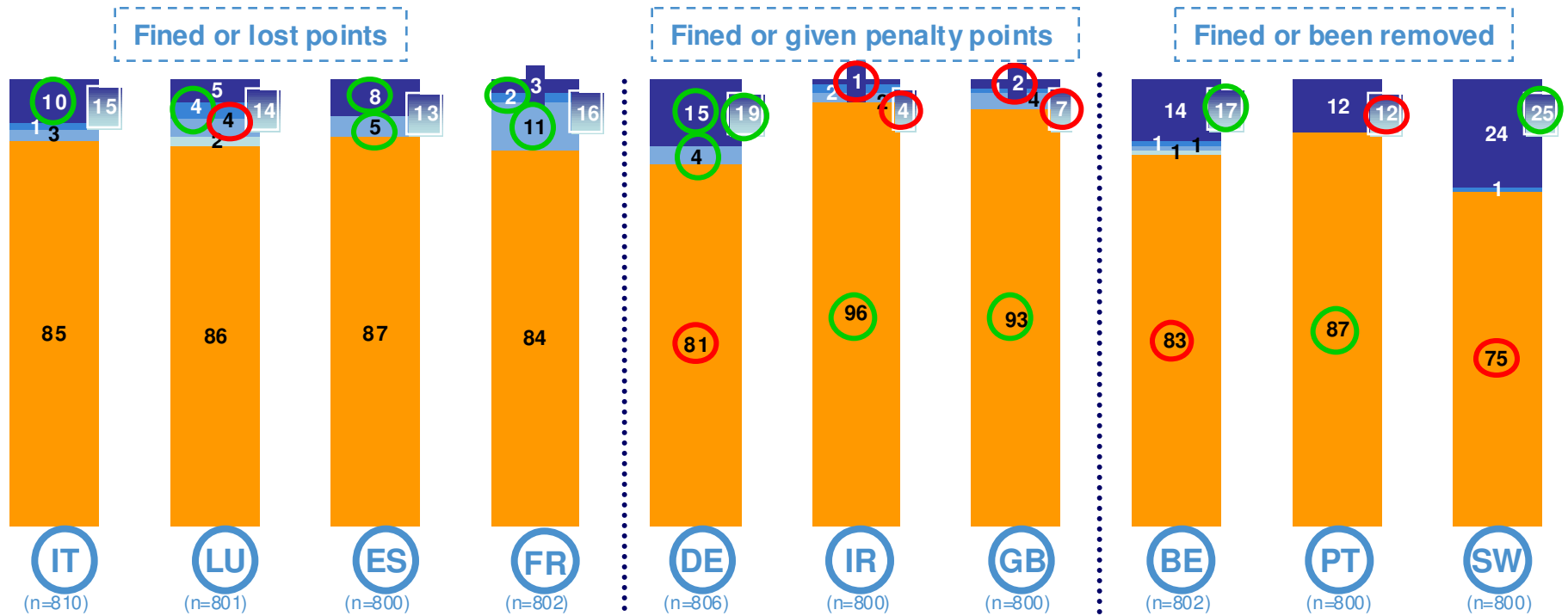
Basis: total sample

Q8. **Italy, Luxembourg, Spain, France:** Have you been fined or lost points on your driving licence over the past 12 months?
Germany, Ireland, GB: Have you been fined or been given penalty points on your driving licence over the past 12 months?
Belgium, Portugal, Switzerland: Have you been fined or has your driving licence been removed over the past 12 months?
(single answer)

- Yes, I have been fined
- Yes, I have been given penalty points / lost points/ licence removed
- Yes, both (fined AND given penalty points/ lost points/ licence removed)
- Yes, but I don't want to specify
- No

ST Yes

In %



Significant differences are calculated between countries which have the same type of fines.





Fines and driving licence status

Overall, as many drivers as last year claimed to have been fined.
Two exceptions: more have been fined in Luxembourg, and fewer in Germany.

Basis: total sample

Q8. **Italy, Luxembourg, Spain, France:** Have you been fined or lost points on your driving licence over the past 12 months?
Germany, Ireland, GB: Have you been fined or been given penalty points on your driving licence over the past 12 months?
Belgium, Portugal, Switzerland: Have you been fined or has your driving licence been removed over the past 12 months?
(single answer)

Basis	ST Yes			Yes, I have been fined			No			
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	
Fined or lost points										
Italy (n=810)	15	15	0	10	10	0	85	85	0	
Luxembourg (n=801)	8	14	5 +	4	5	1	92	86	-5 -	
Spain (n=800)	13	13	0	9	8	-2	87	87	0	
France (n=802)	NA	16	-	NA	3	-	NA	84	-	
Fined or given penalty points										
Germany (n=806)	24	19	-5 -	18	15	-4	76	81	4 +	
Ireland (n=800)	6	4	-2	0	1	1	94	96	2	
Great Britain (n=800)	7	7	0	1	2	1	93	93	0	
Fined or been removed										
Belgium (n=802)	20	17	-3	19	14	-5 -	79	83	3	
Portugal (n=800)	12	12	0	12	12	0	88	87	0	
Switzerland (n=800)	23	25	3	22	24	2	77	75	-2	

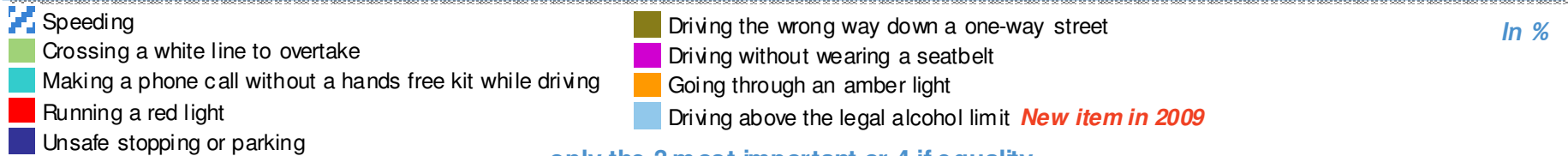


Most serious breaches of the highway code (1/2)

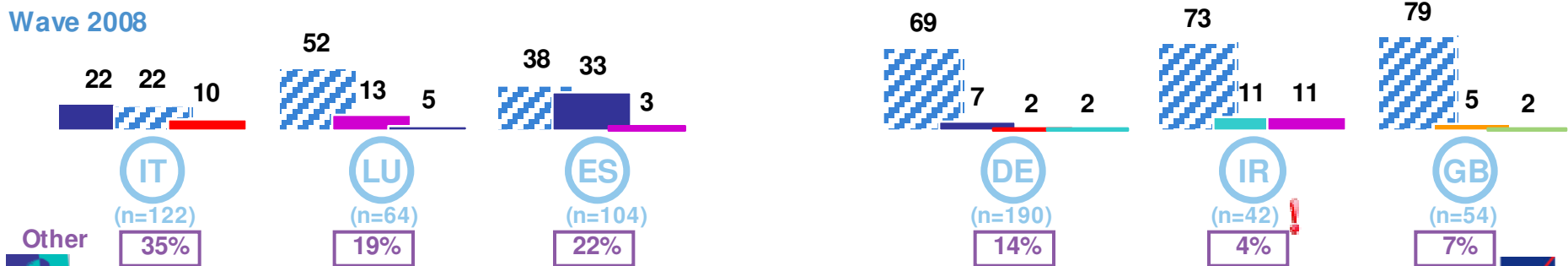
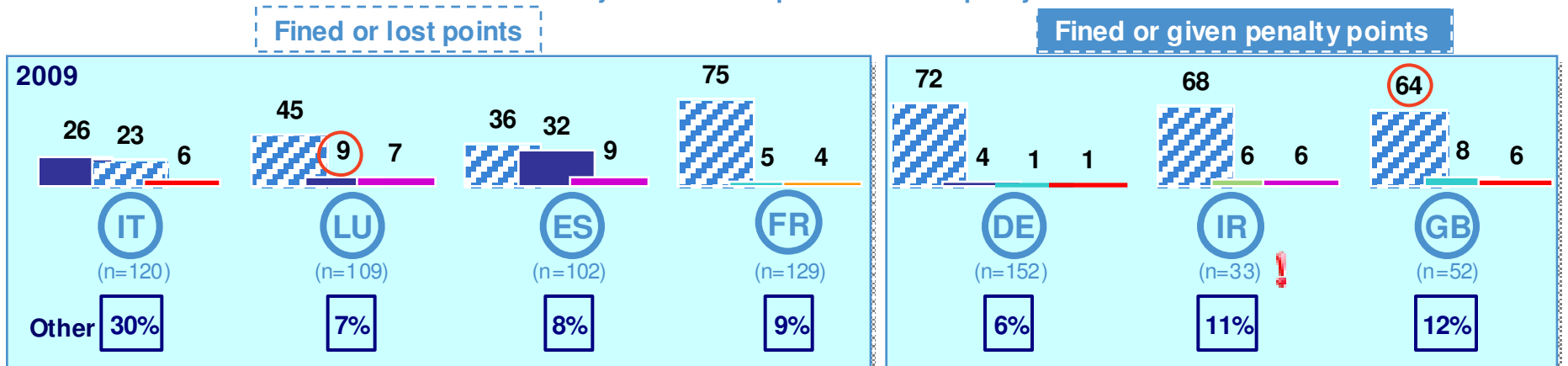
Speeding is the most serious breach of the highway code in all countries, except in Portugal and Italy where it is unsafe stopping.

Basis: Have had a fine or their driving licence has been impacted

Q9. Italy, Luxembourg, Spain, France: What is the most serious breach of the highway code for which you have been fined or lost points on your driving licence?
 Germany, Ireland, GB: What is the most serious breach of the highway code for which you have been fined or given penalty points on your driving licence?



only the 3 most important or 4 if equality





Most serious breaches of the highway code (2/2)

Basis: Have had a fine or their driving licence has been impacted

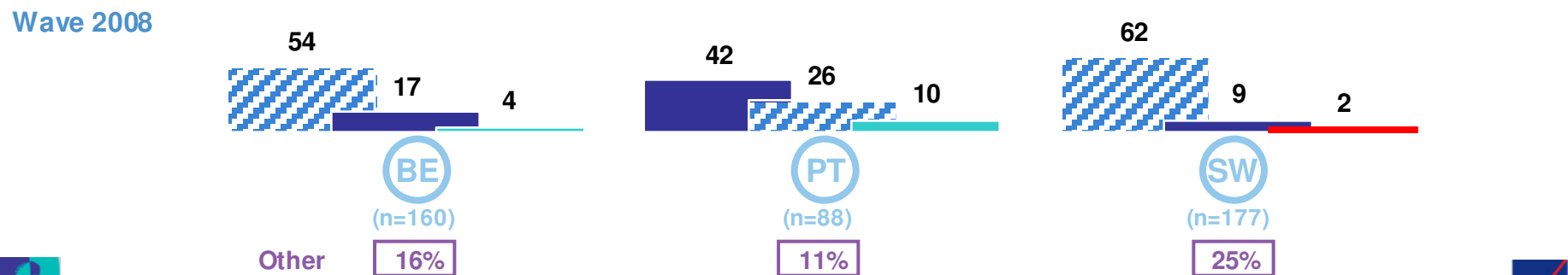
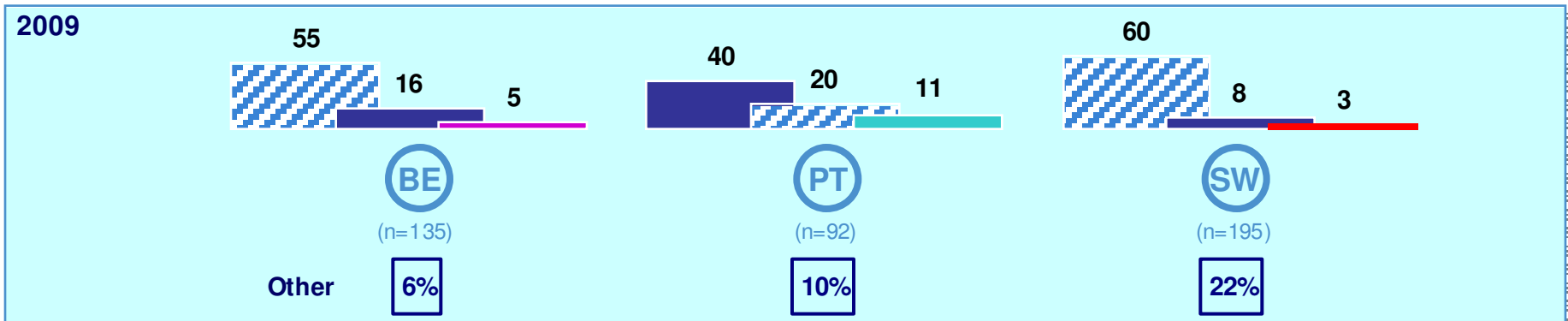
Q9. Belgium, Portugal, Switzerland: What is the most serious breach of the highway code for which you have been fined? (single answer)

- Speeding
- Crossing a white line to overtake
- Making a phone call without a hands free kit while driving
- Running a red light
- Unsafe stopping or parking
- Driving the wrong way down a one-way street
- Driving without wearing a seatbelt
- Going through an amber light
- Driving above the legal alcohol limit *New item in 2009*

In %

only the 3 most important or 4 if equality

Fined or been removed





Most serious breaches of the highway code

Ranking 2009

Basis: Have had a fine or their driving licence has been impacted

Q9. **Italy, Luxembourg, Spain, France:** What is the most serious breach of the highway code for which you have been fined or lost points on your driving licence?
Germany, Ireland, GB: What is the most serious breach of the highway code for which you have been fined or given penalty points on your driving licence?
Belgium, Portugal, Switzerland: What is the most serious breach of the highway code for which you have been fined?
(single answer)

No European average because driving licence systems are not the same across Europe

	IT (n=120)	LU (n=109)	ES (n=102)	FR (n=129)	DE (n=152)	IR (n=33) !	GB (n=52)	BE (n=135)	PT (n=92)	SW (n=195)
Speeding	2	1	1	1	1	1	1	1	2	1
Unsafe stopping or parking	1	2	2	4	2	6	4	2	1	2
Making a phone call without a hands free kit while driving	4	6	4	2	3	4	2	6	3	5
Driving without wearing a seatbelt	5	3	3	7	3	2	7	3	5	4
Running a red light	3	9	6	7	3	5	3	6	8	3
Driving above the legal alcohol limit	8	4	4	5	6	6	6	4	4	5
Crossing a white line to overtake	6	6	8	5	6	2	4	8	5	5
Going through an amber light	6	8	7	3	6	6	7	4	9	8
Driving the wrong way down a one-way street	8	4	8	7	6	6	7	8	7	8

! Very small base. Results to be viewed with caution





Perception of speed restrictions

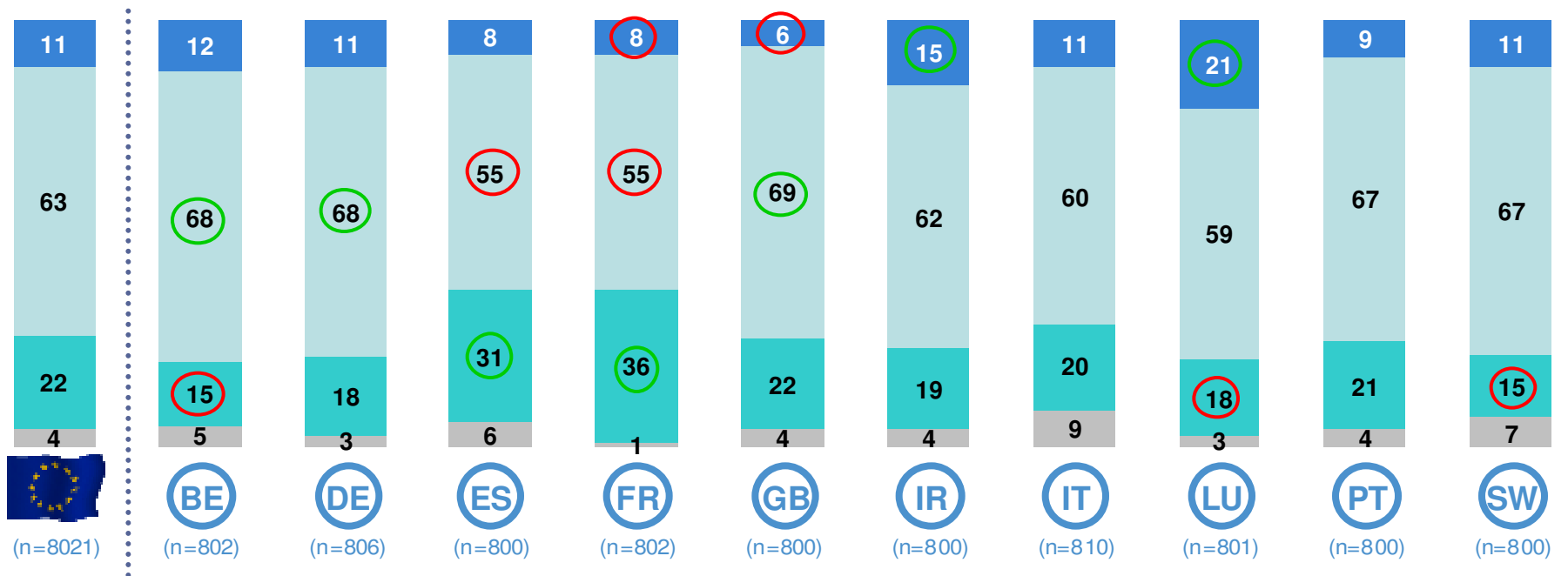
For most European drivers, speed limits aim to reduce the seriousness of road accidents. However, Spanish and French drivers stressed much more often than the European average that these limits are established to satisfy the government's need for revenue.

Basis: total sample

Q21. In your opinion, current speed limits are primarily established on the basis of...? (single answer)

- Need to harmonize European laws
- Aim to reduce the seriousness of road accidents with impact
- The government's need for revenue
- DK

In %





Perception of speed restrictions

The feeling that speed restrictions aim to increase government revenue has increased in Switzerland, Germany, Portugal, but above all in Spain.

Basis: total sample

Q21. In your opinion, current speed limits are primarily established on the basis of...? (single answer)

Basis	Need to harmonize European laws			Aim to reduce the seriousness of road accidents with impact			The government's need for revenue		
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium (n=802)	9	12	3	72	68	-4	15	15	0
Germany (n=806)	13	11	-2	71	68	-4	11	18	7 +
Spain (n=800)	9	8	-1	65	55	-10 -	19	31	12 +
France (n=802)	7	8	1	59	55	-4	33	36	3
Great Britain (n=800)	7	6	-1	69	69	-1	18	22	3
Ireland (n=800)	15	15	0	66	62	-4	16	19	3
Italy (n=810)	16	11	-5 -	61	60	-1	19	20	2
Luxembourg (n=801)	18	21	3	68	59	-9 -	9	18	8
Portugal (n=800)	13	9	-4 -	70	67	-3	14	21	7 +
Switzerland (n=800)	10	11	0	75	67	-8 -	10	15	5 +



Perception of traffic offence penalties

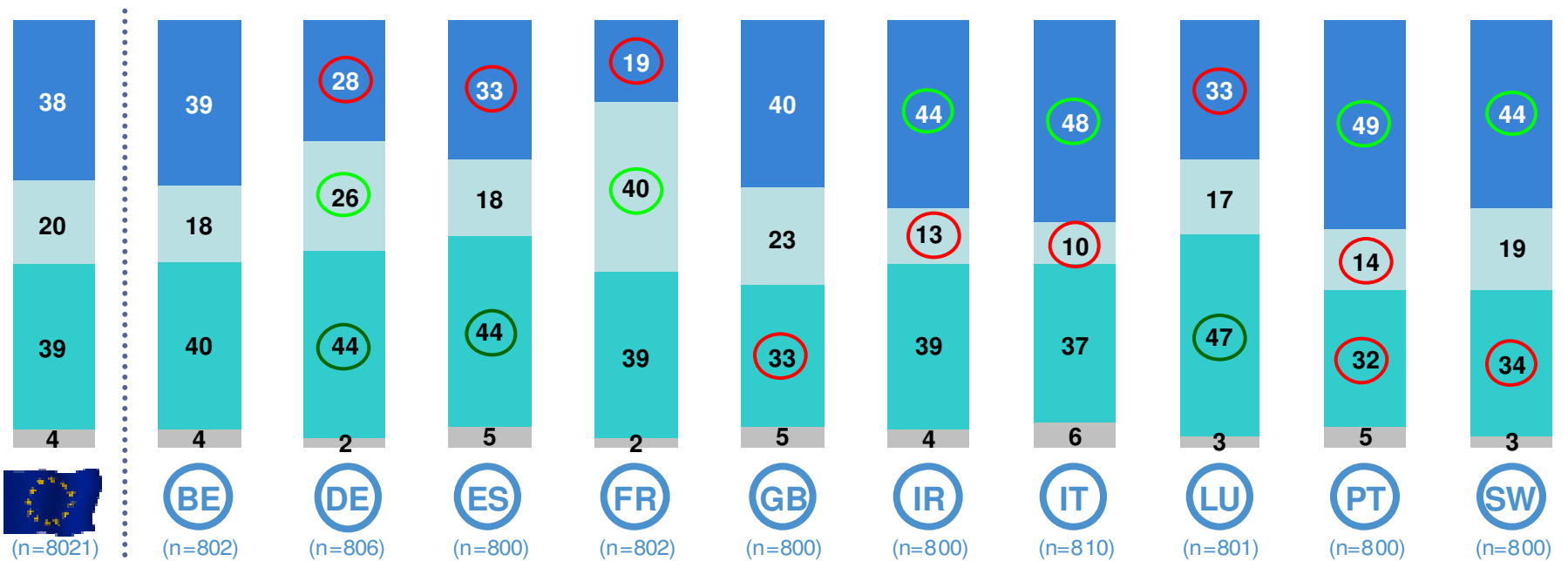
Overall, nearly 40% of European drivers want more severity, especially the Portuguese, Italian, Irish and Swiss drivers, whereas the Germans and above all the French ask for more leniency.

Basis: total sample

Q16. With respect to traffic offences, do you feel they should be punished more severely than they are now, more flexibly/leniently than they are now or just as they are now? (single answer)

- More severely than they are now
- More flexibly/leniently than they are now
- Just as they are now
- DK

In %





Perception of traffic offence penalties

In comparison to last year, a larger number of French, Spanish, Luxembourgish and Portuguese drivers are in favour of more flexibility regarding traffic offence penalties. The Germans, Spanish, Irish and Italians want them to remain as they are now.

Basis: total sample

Q16. With respect to traffic offences, do you feel they should be punished more severely than they are now, more flexibly/leniently than they are now or just as they are now? (single answer)

Basis	More severely than they are now			More flexibly/leniently than they are now			Just as they are now		
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium (n=802)	35	39	4	22	18	-5 -	36	40	4
Germany (n=806)	33	28	-5 -	25	26	1	36	44	8 +
Spain (n=800)	46	33	-13 -	13	18	5 +	37	44	7 +
France (n=802)	28	19	-8	28	40	12	43	39	-4
Great Britain (n=800)	44	40	-4	19	23	4	31	33	1
Ireland (n=800)	49	44	-5	14	13	-1	34	39	5 +
Italy (n=810)	55	48	-7 -	11	10	-2	29	37	8 +
Luxembourg (n=801)	40	33	-7 -	12	17	5 +	43	47	4
Portugal (n=800)	52	49	-3	11	14	3 +	32	32	0
Switzerland (n=800)	40	44	4	20	19	0	37	34	-3



B. In-depth Findings

3 – European drivers' expectations

- Importance of road accident prevention
- Priority safety measures



Importance of road accident prevention

9 Europeans out of 10 acknowledge the importance of road accident prevention but some discrepancies can be seen: the importance of prevention is extremely great in Great Britain, Ireland and Germany but poorer in Belgium and France.

Basis: total sample

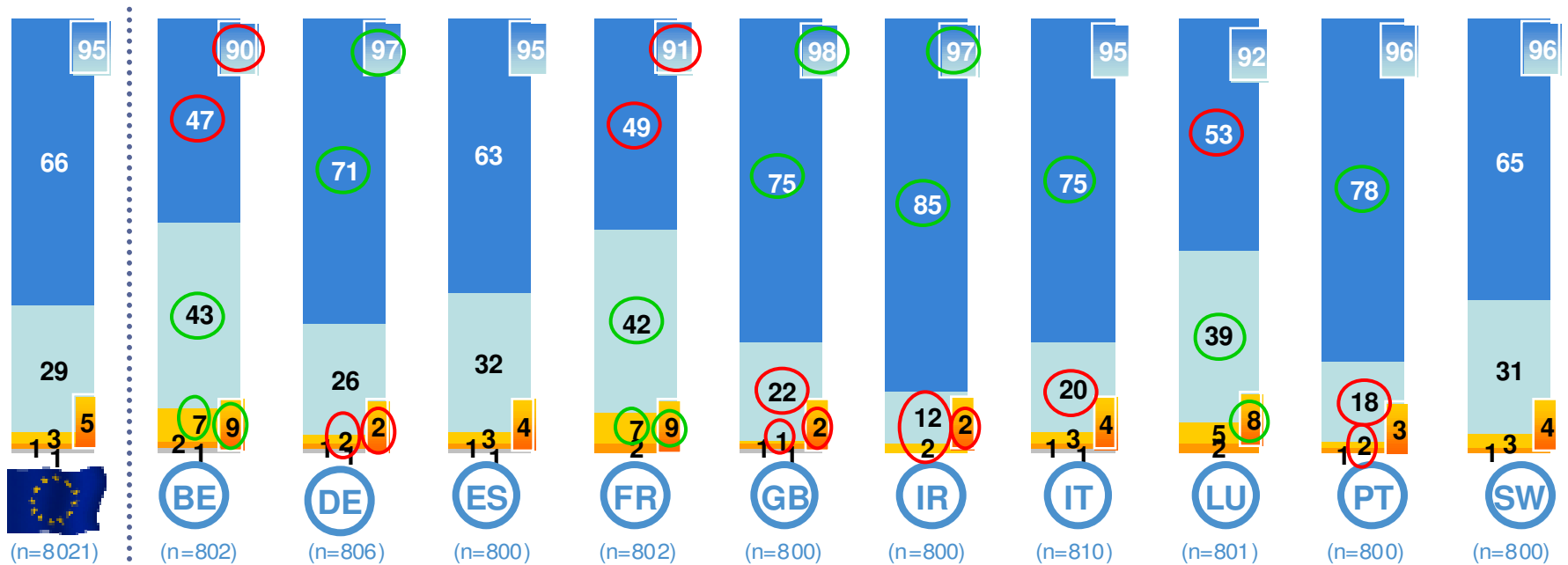
Q17. In general, how important do you feel that road accident prevention is? Would you say very important, fairly important, not very important or not at all important? (single answer)

- Very important
- Fairly important
- Not very important
- Not at all important
- DK

ST Important

ST Not important

In %





Importance of road accident prevention

Results remained stable: overall there has been little change, except for Great Britain, where the importance of road accident prevention is higher and in Luxembourg and France, where it has tended to decrease.

Basis: total sample

Q17. In general, how important do you feel that road accident prevention is? Would you say very important, fairly important, not very important or not at all important? (single answer)

Basis	ST Important			Very important			ST Not important		
	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)	2008 %	2009 %	Gap (in points)
Belgium (n=802)	91	90	-2	51	47	-4	8	9	1
Germany (n=806)	95	97	1	69	71	2	3	2	-1
Spain (n=800)	93	95	2	66	63	-3	6	4	-2
France (n=802)	95	91	-4 -	51	49	-1	5	9	3
Great Britain (n=800)	95	98	2 +	73	75	2	4	2	-2 -
Ireland (n=800)	98	97	-1	85	85	-1	2	2	0
Italy (n=810)	95	95	0	79	75	-4 -	5	4	0
Luxembourg (n=801)	95	92	-3 -	60	53	-7 -	4	8	3 +
Portugal (n=800)	98	96	-1	85	78	-7 -	2	3	2 +
Switzerland (n=800)	94	96	1	65	65	0	6	4	-2



Priority safety measures - Top 3 per country - (1/2)

Most countries rank in 1st or 2nd place the development of prevention programmes for young drivers, and teaching road safety to children as well as raising awareness on how drinking affects driving.

Basis: total sample

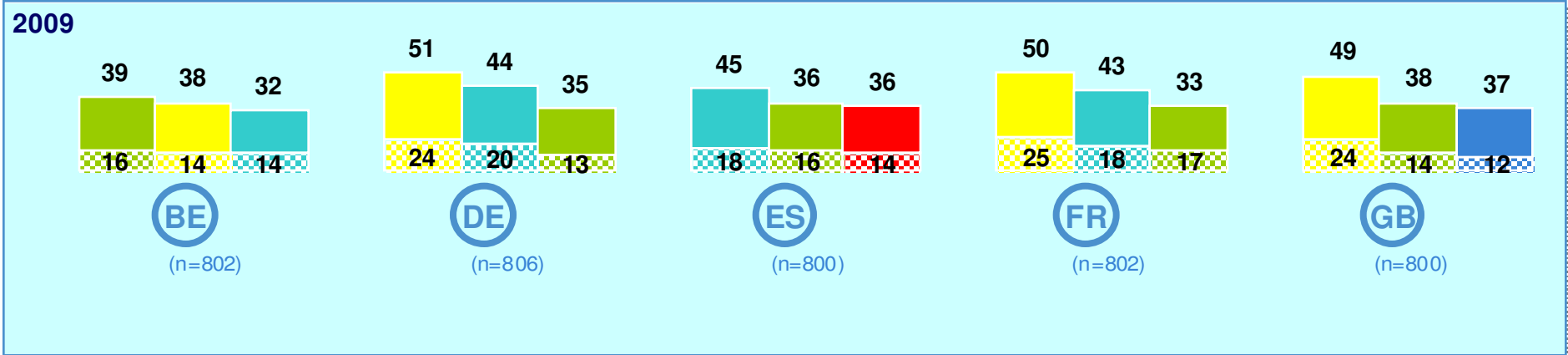
Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

- Develop prevention programmes for young drivers
- Raise awareness on how drinking affects driving
- Teach road safety to children
- Improve road infrastructure
- Encourage drivers to respect the speed limit
- Install warning signs at dangerous spots

- Develop prevention programmes for drivers of large trucks
- Develop prevention programmes for motorcyclists
- Encourage drivers and all passengers to fasten their seatbelt
- Encourage drivers to drive with lights on at all times
- Encourage drivers to avoid answering the phone while driving

New item in 2009

All First
In %



only the 3 most important or 4 if equality



Priority safety measures - Top 3 per country - (2/2)

.... except in Italy which primarily wants to see road infrastructure improvement.

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers - 3 mentions max)

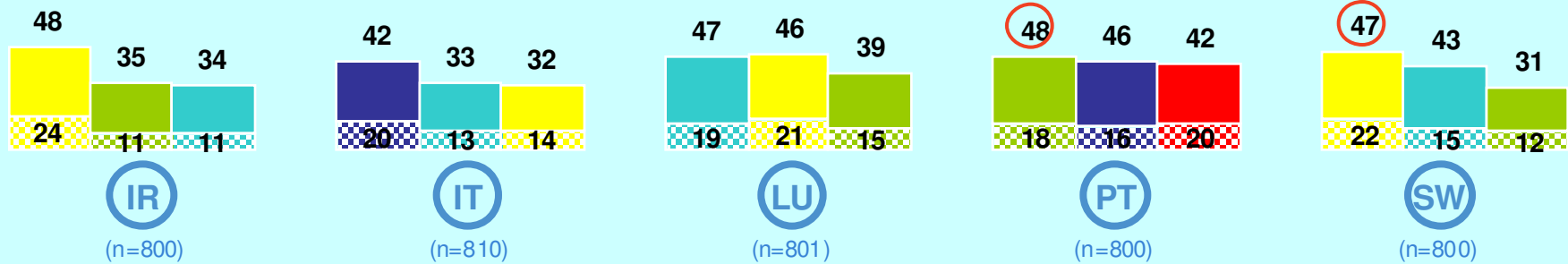
- Develop prevention programmes for young drivers
- Raise awareness on how drinking affects driving
- Teach road safety to children
- Improve road infrastructure
- Encourage drivers to respect the speed limit
- Install warning signs at dangerous spots

- Develop prevention programmes for drivers of large trucks
- Develop prevention programmes for motorcyclists
- Encourage drivers and all passengers to fasten their seatbelt
- Encourage drivers to drive with lights on at all times
- Encourage drivers to avoid answering the phone while driving

New item in 2009

■ All
■ First
In %

2009



only the 3 most important or 4 if equality



Priority safety measures – (1/5)

Prevention programmes for young drivers are less expected by drivers from the southern countries. Measures related to drinking & driving are particularly requested in Luxembourg, Spain and Germany, and in contrast rather less mentioned in Belgium, Great Britain, Italy and Ireland.

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

In %

■ All ■ First





Priority safety measures – (2/5)

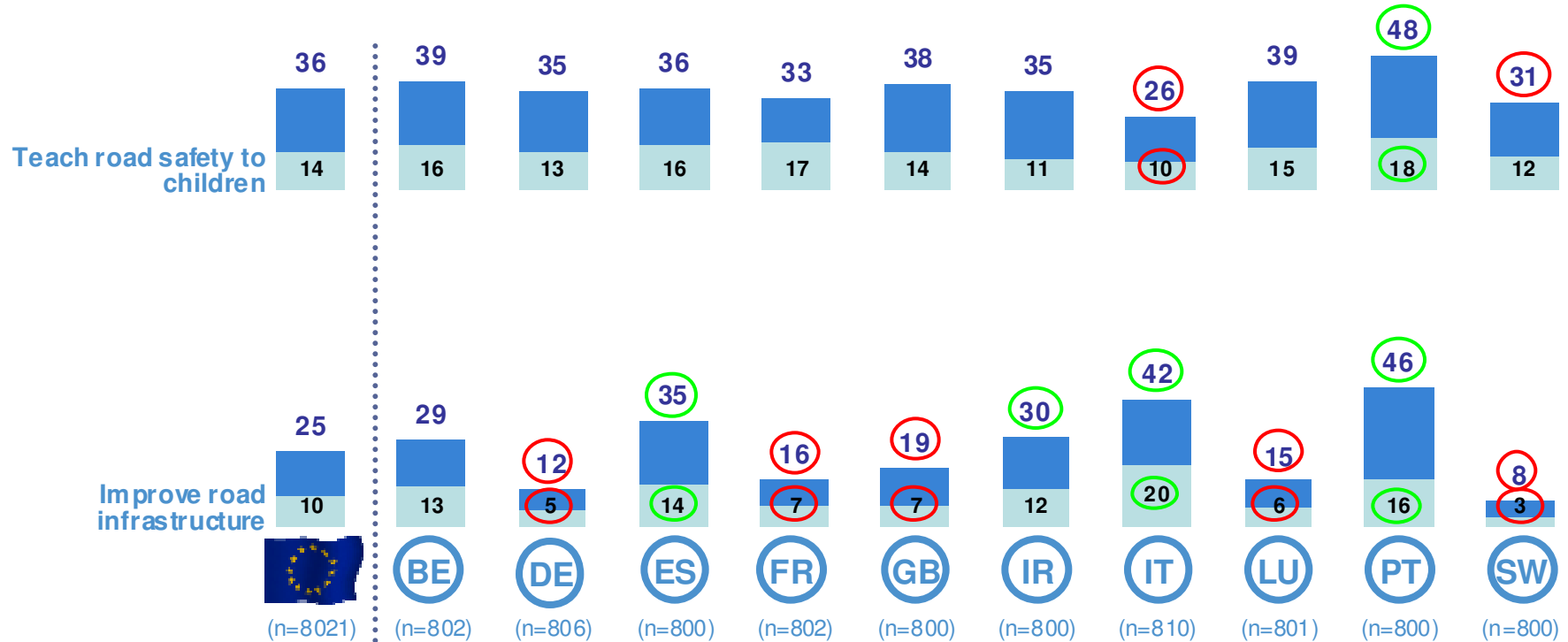
Teaching road safety to children was requested at a particularly high level in Portugal (while prevention amongst younger drivers was not). Infrastructure improvement is significantly more important for Countries in southern Europe.

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

In %

■ All ■ First





Priority safety measures – (3/5)

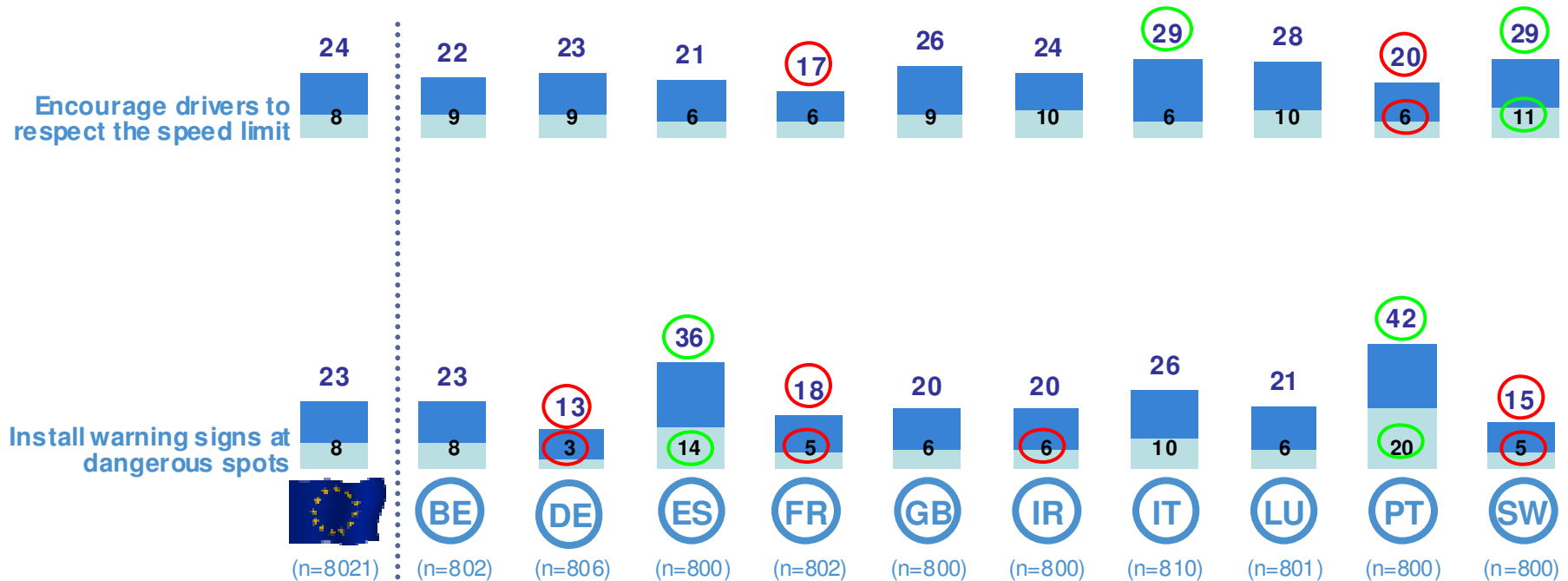
The Swiss and Italians see more value than the European average in encouraging compliance with speed limits (whereas this is particularly low for France and Portugal). The installation of warning signs appears particularly important in Portugal and Spain (where road infrastructure improvement was already highly requested).

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

In %

■ All ■ First





Priority safety measures – (4/5)

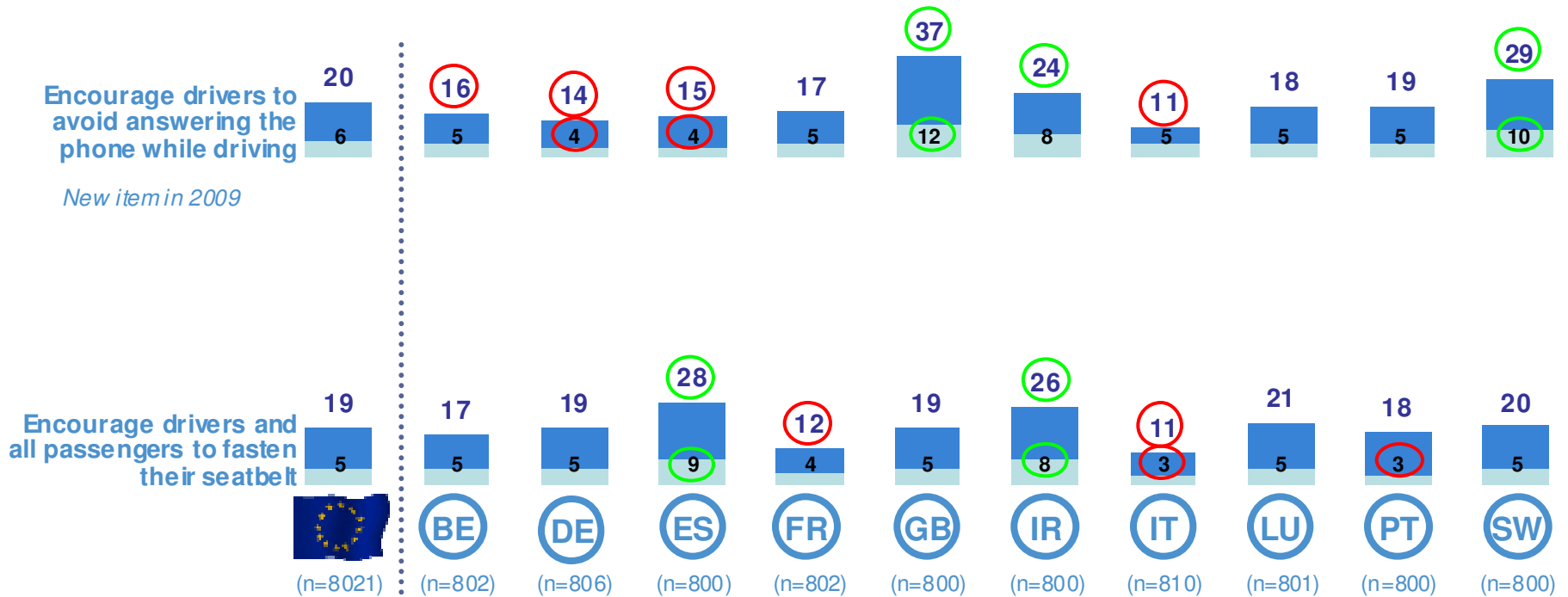
Great Britain is the country most requesting measures encouraging drivers to avoid answering their mobile while driving, closely followed by Switzerland and Ireland. Spanish and Irish drivers expect measures encouraging seatbelt fastening at a higher level than the European average.

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

In %

■ All ■ First





Priority safety measures – (5/5)

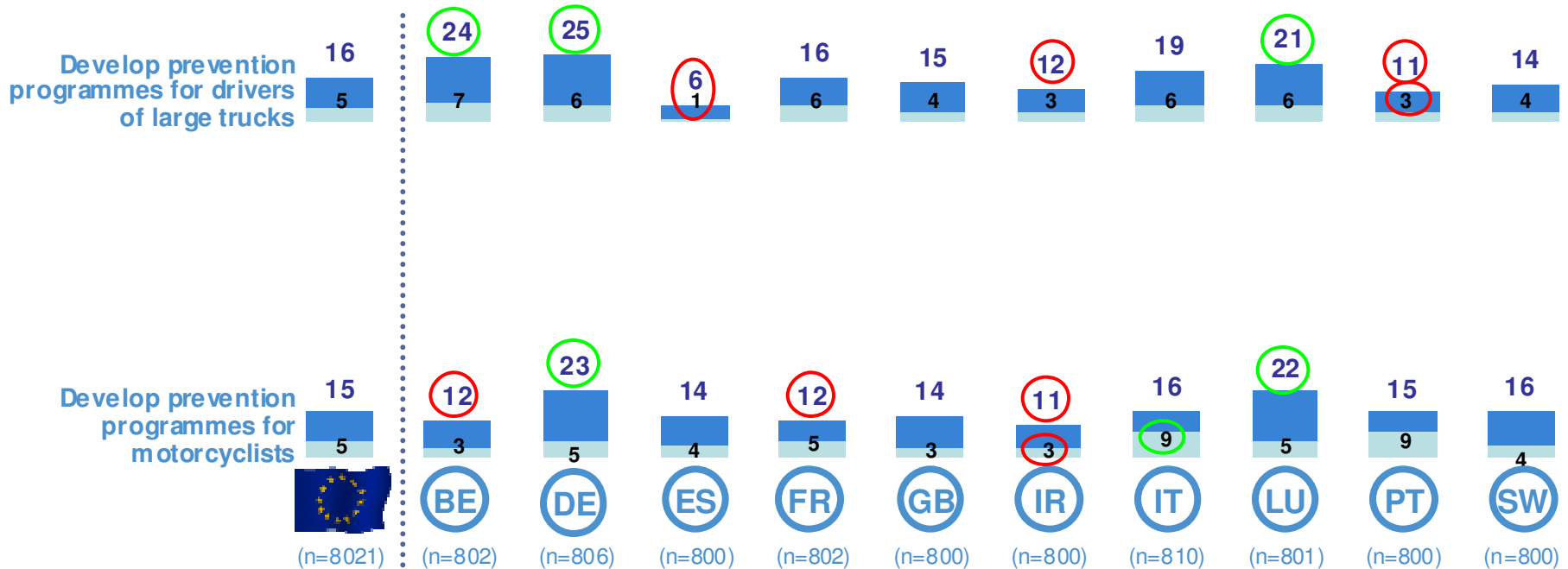
Prevention regarding large trucks seems particularly important in “heavy traffic”* countries such as Germany, Belgium and Luxembourg. For these latter two countries, prevention measures for Motorcyclists are also a priority more often than in the rest of Europe.

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

In %

■ All ■ First



* See desk research reports 2008





Priority safety measures

All measures – Ranking 2009

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

ALL

											
Basis : Total sample	(n=8021)	(n=802)	(n=806)	(n=800)	(n=802)	(n=800)	(n=800)	(n=810)	(n=801)	(n=800)	(n=800)
Develop prevention programmes for young drivers	1	2	1	6	1	1	1	3	2	5	1
Raise awareness on how drinking affects driving	2	3	2	1	2	4	3	2	1	4	2
Teach road safety to children	3	1	3	2	3	2	2	5	3	1	3
Improve road infrastructure	4	4	10	4	7	7	4	1	10	2	10
Encourage drivers to respect the speed limit	5	7	5	7	5	5	6	4	4	6	4
Install warning signs at dangerous spots	6	6	9	2	4	6	8	5	6	3	8
Encourage drivers to avoid answering the phone while driving	7	9	8	8	5	3	6	9	9	7	4
Encourage drivers and all passengers to fasten their seatbelt	8	8	7	5	9	7	5	9	6	8	6
Develop prevention programmes for drivers of large trucks	9	5	4	10	7	9	9	7	6	10	9
Develop prevention programmes for motorcyclists	10	10	5	9	9	10	10	8	5	9	7



Priority safety measures

First measures – Ranking 2009

Basis: total sample

Q18. To improve road safety, in your opinion what types of preventive measures need to be improved as a matter of priority? (Read all answers – 3 mentions max)

FIRST

											
Basis : Total sample	(n=8021)	(n=802)	(n=806)	(n=800)	(n=802)	(n=800)	(n=800)	(n=810)	(n=801)	(n=800)	(n=800)
Develop prevention programmes for young drivers	1	2	1	5	1	1	1	2	1	4	1
Raise awareness on how drinking affects driving	2	2	2	1	2	3	3	3	2	4	2
Teach road safety to children	3	1	3	2	3	2	3	4	3	2	3
Improve road infrastructure	4	4	6	3	4	6	2	1	5	3	10
Encourage drivers to respect the speed limit	5	5	4	7	5	5	5	7	4	7	4
Install warning signs at dangerous spots	5	6	10	3	7	7	8	4	5	1	6
Encourage drivers to avoid answering the phone while driving	7	8	9	8	7	4	6	9	8	8	5
Encourage drivers and all passengers to fasten their seatbelt	8	8	6	6	10	8	6	10	8	9	6
Develop prevention programmes for drivers of large trucks	8	7	5	10	5	9	9	7	5	9	8
Develop prevention programmes for motorcyclists	8	10	6	8	7	10	9	6	8	4	8



New “zero alcohol behind the wheel” law

On the whole, 6 out of 10 European drivers tend to be in favour of such a law. However, the Anglo-Saxons, Spanish and Italians are particularly convinced by it, whereas the Swiss, Luxembourgers, Portuguese, German and French are more sceptical.

Basis: total sample

Q20ter. Let's imagine that a new “zero alcohol behind the wheel” law is passed – banning driving after drinking any alcohol. Would you say that it is a very good idea, a fairly good idea, a fairly bad idea or a very bad idea? (single answer)

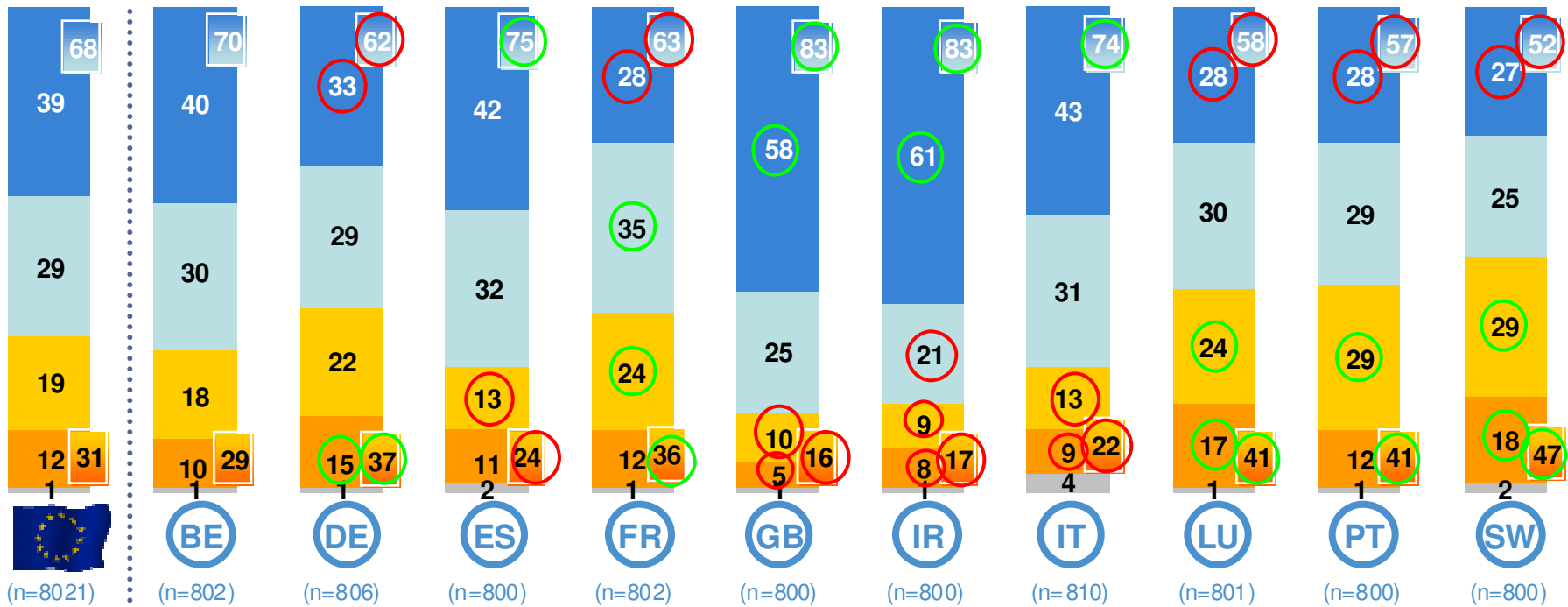
In %

- A very good idea
- A fairly good idea
- A fairly bad idea
- A very bad idea
- DK

ST Good idea

ST Bad idea

New question in 2009





B. In-depth Findings

4 – European drivers' reactions to fuel prices and environmental topics

- Reaction to fuel price changes
- Opinion on speed limit reduction



Reaction to fuel price changes

France and Germany are the two countries most influenced by the rise in fuel prices and have changed their driving behaviour. In contrast, Italy, Switzerland, Spain and Ireland have been much less impacted.

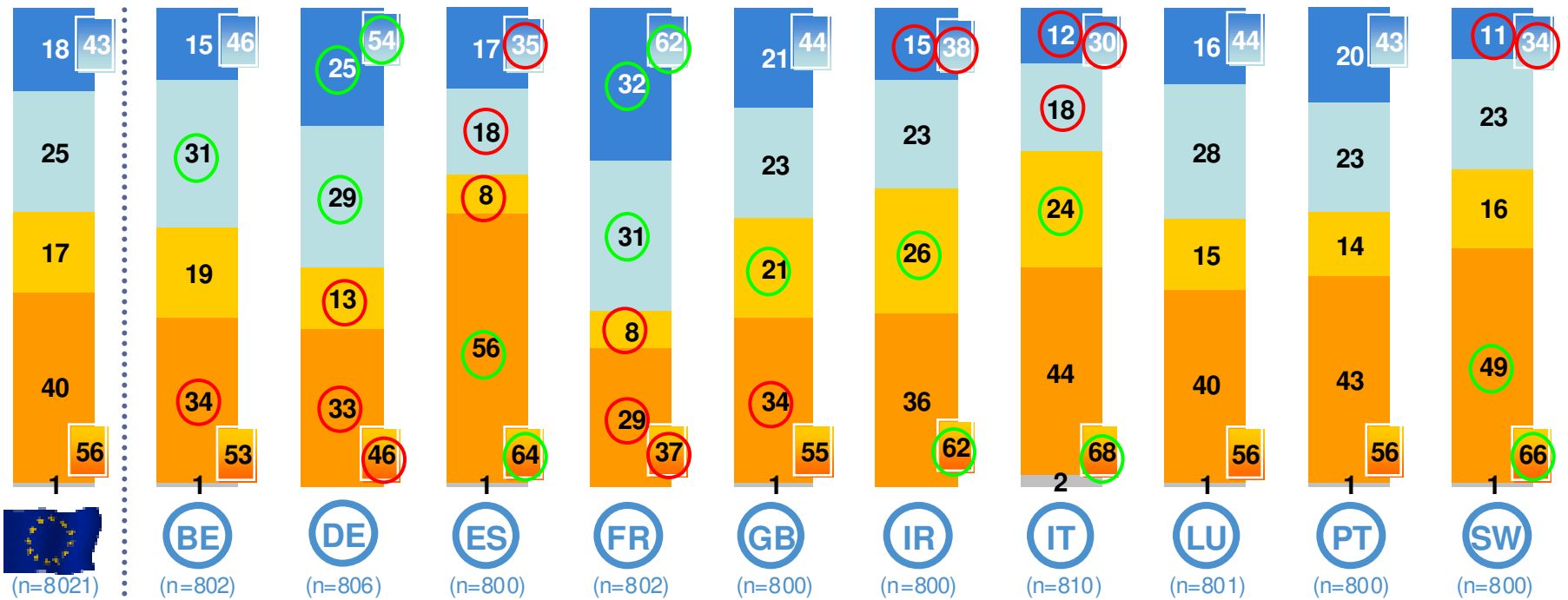
Basis: total sample

Q24. I will now ask you a few questions about the changes in the price of fuel in 2008. Would you say that the rise in the petrol price until Autumn 2008 influenced the way you used your car and your driving habits a lot, somewhat, not really or not at all? (single answer)

New question in 2009

- A lot
 - Somewhat
 - Not really
 - Not at all
 - DK
- ST Yes
- ST No

In %





Reaction to fuel price changes (1/3)

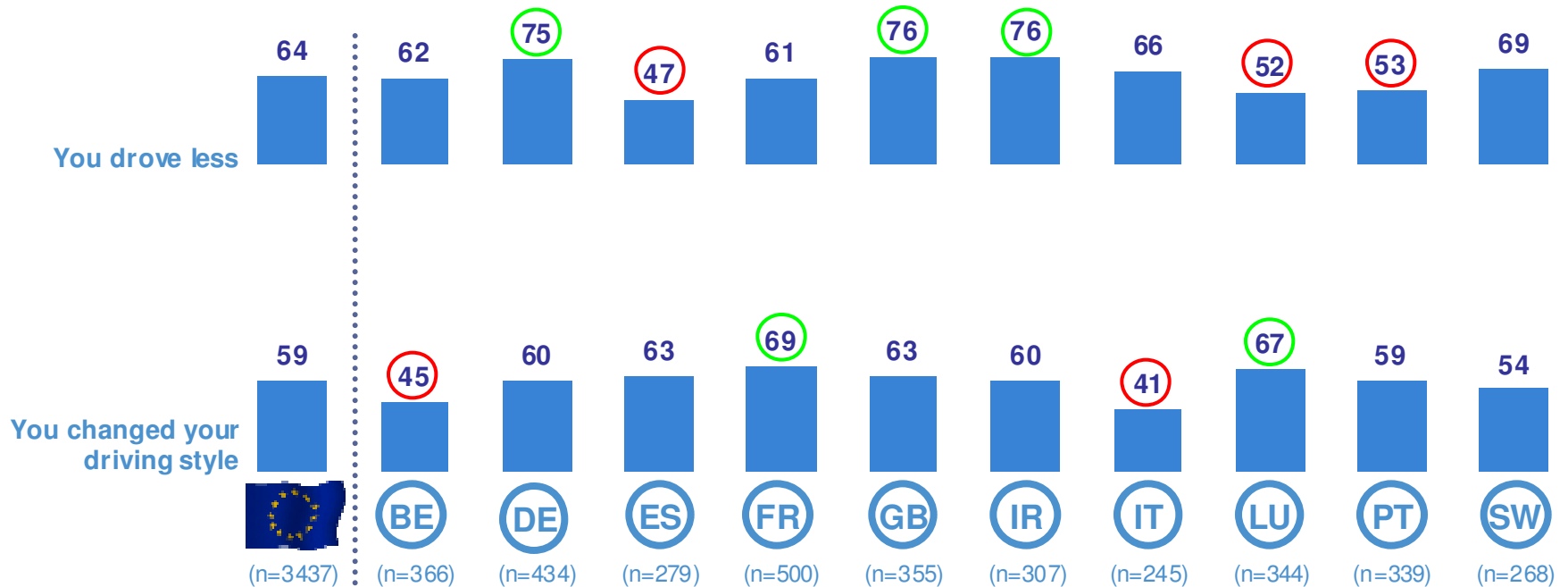
British, Irish and German drivers are the ones who most reduced their car use whereas the French and Luxembourgish drivers changed their driving style more often.

Basis: changed their attitude a lot or somewhat

Q25. How did you change your driving behaviour? From the following list of items please indicate whether or not it is one of the ways you changed your habits due to the increase in fuel costs. (single answer per item)

In %

New question in 2009





Reaction to fuel price changes (2/3)

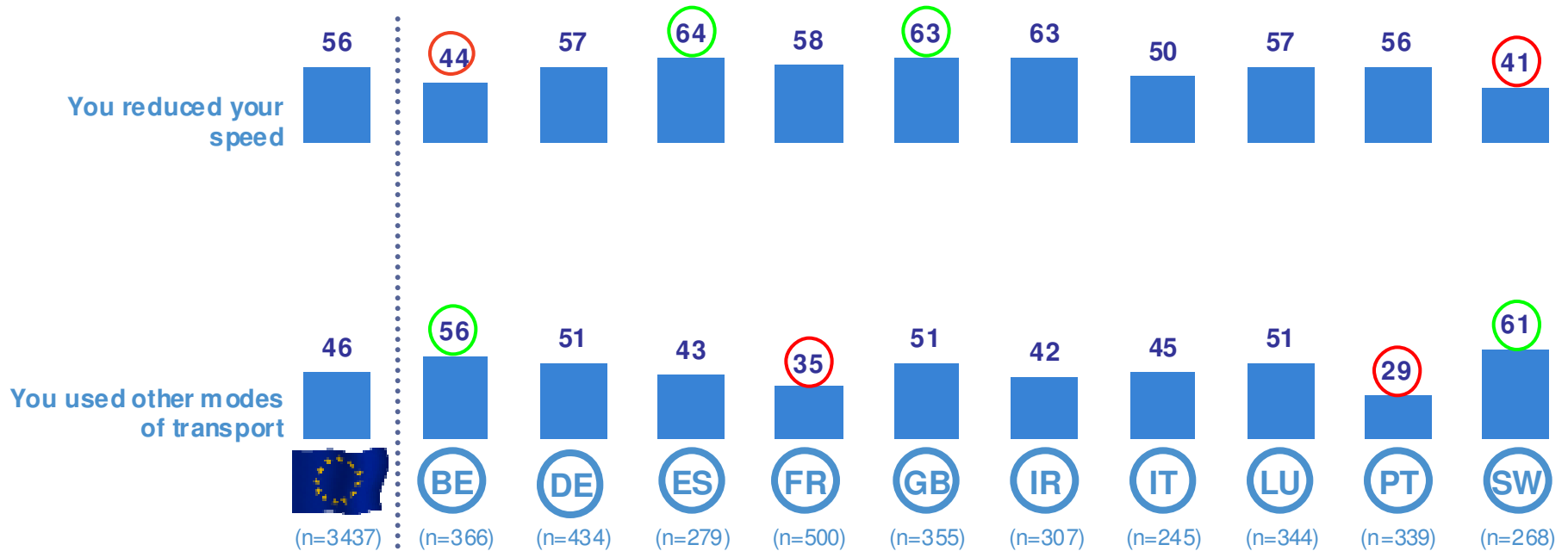
In Spain and Great Britain, drivers reduced their speed more often whereas in Switzerland and Belgium, drivers used alternative modes of transport more frequently.

Basis: changed their attitude a lot or somewhat

Q25. How did you change your driving behaviour? From the following list of items please indicate whether or not it is one of the ways you changed your habits due to the increase in fuel costs. (single answer per item)

In %

New question in 2009





Reaction to fuel price changes (3/3)

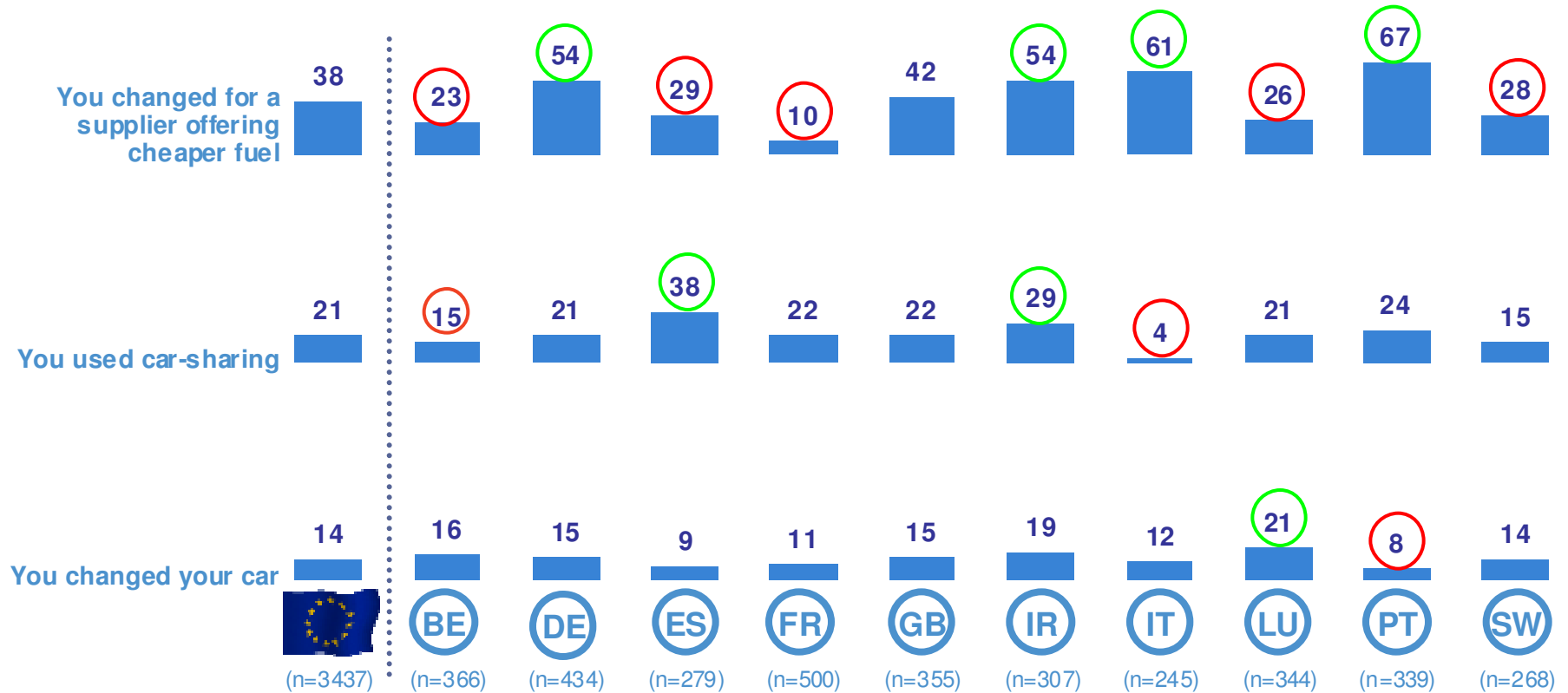
The choice of a cheaper fuel supplier was an alternative particularly mentioned in Portugal, Italy, Germany and Ireland. In Spain, and to a lesser extent in Ireland, they also opted more often for car-sharing whereas not in Italy.

Basis: changed their attitude a lot or somewhat

Q25. How did you change your driving behaviour? From the following list of items please indicate whether or not it is one of the ways you changed your habits due to the increase in fuel costs. (single answer per item)

In %

New question in 2009





Reaction to fuel price changes – Ranking 2009

Basis: changed their attitude a lot or somewhat

Q25. How did you change your driving behaviour? From the following list of items please indicate whether or not it is one of the ways you changed your habits due to the increase in fuel costs. (single answer per item)

New question in 2009



Basis : changed their attitude a lot or somewhat

(n=3437)

(n=366)

(n=434)

(n=279)

(n=500)

(n=355)

(n=307)

(n=245)

(n=344)

(n=339)

(n=268)

	EU	BE	DE	ES	FR	GB	IR	IT	LU	PT	SW
You drove less	1	1	1	3	2	1	1	1	3	4	1
You changed your driving style	2	3	2	2	1	2	3	5	1	2	3
You reduced your speed	3	4	3	1	3	2	2	3	2	3	4
You used other modes of transport	4	2	5	4	4	4	5	4	4	5	2
You changed for a supplier offering cheaper fuel	5	5	4	6	7	5	4	2	5	1	5
You used car-sharing	6	7	6	5	5	6	6	7	6	6	6
You changed your car	7	6	7	7	6	7	7	6	6	7	7



Reaction to fuel price changes

In Germany, Portugal and France, 9 drivers out of 10 claimed to have maintained the habits acquired during the price rise after the sharp drop. Great Britain and Italy have the most drivers who admitted to having returned to their old habits.

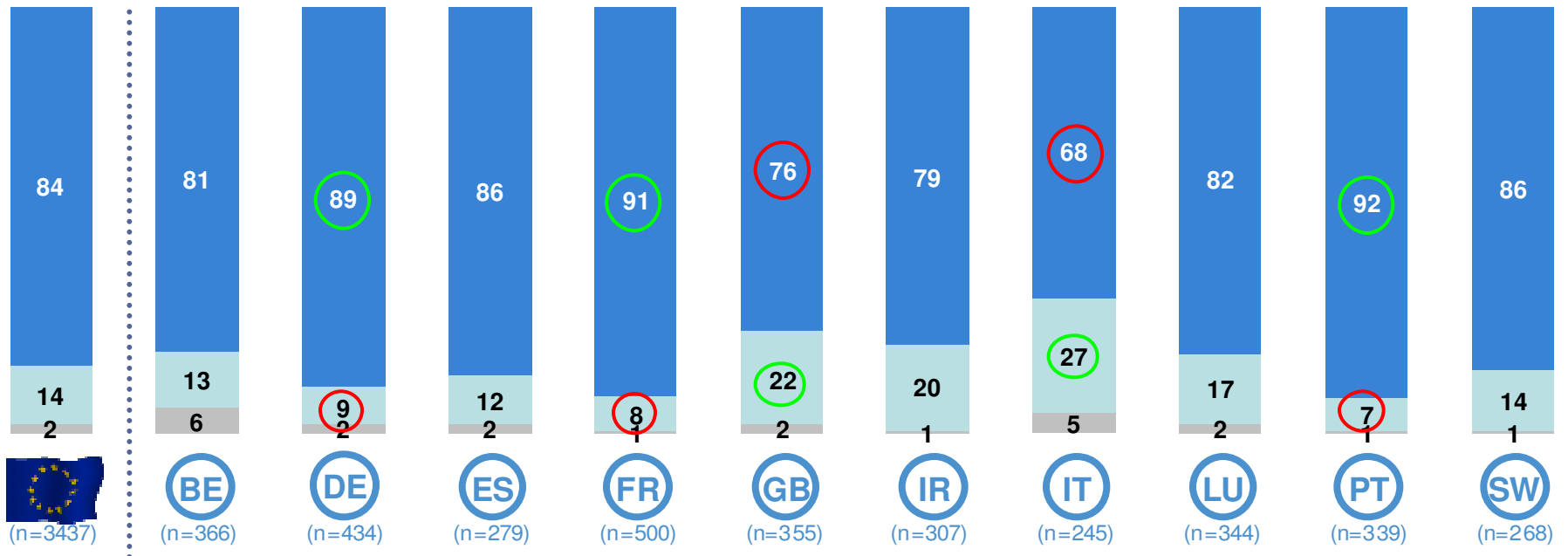
Basis: changed their attitude a lot or somewhat

Q25bis. And how have you reacted to the sharp drop in the price fuel since autumn 2008? (single answer)

New question in 2009

In %

- Maintained the habits adopted when the price of fuel was very high
- Gradually returned to your old habits
- DK





Reaction to fuel price changes

9 drivers out of 10 in Germany, France and Portugal have reduced their fuel consumption.

Basis: changed their attitude a lot or somewhat

Q25ter. And would you say? (single answer)

New question in 2009

In %

- Continue to pay attention to your fuel consumption
- Pay less attention to your fuel consumption
- DK





Opinion on speed limit reduction

Italy, Luxembourg and Ireland are the countries most in favour of a speed reduction for environmental reasons unlike Portugal and Switzerland.

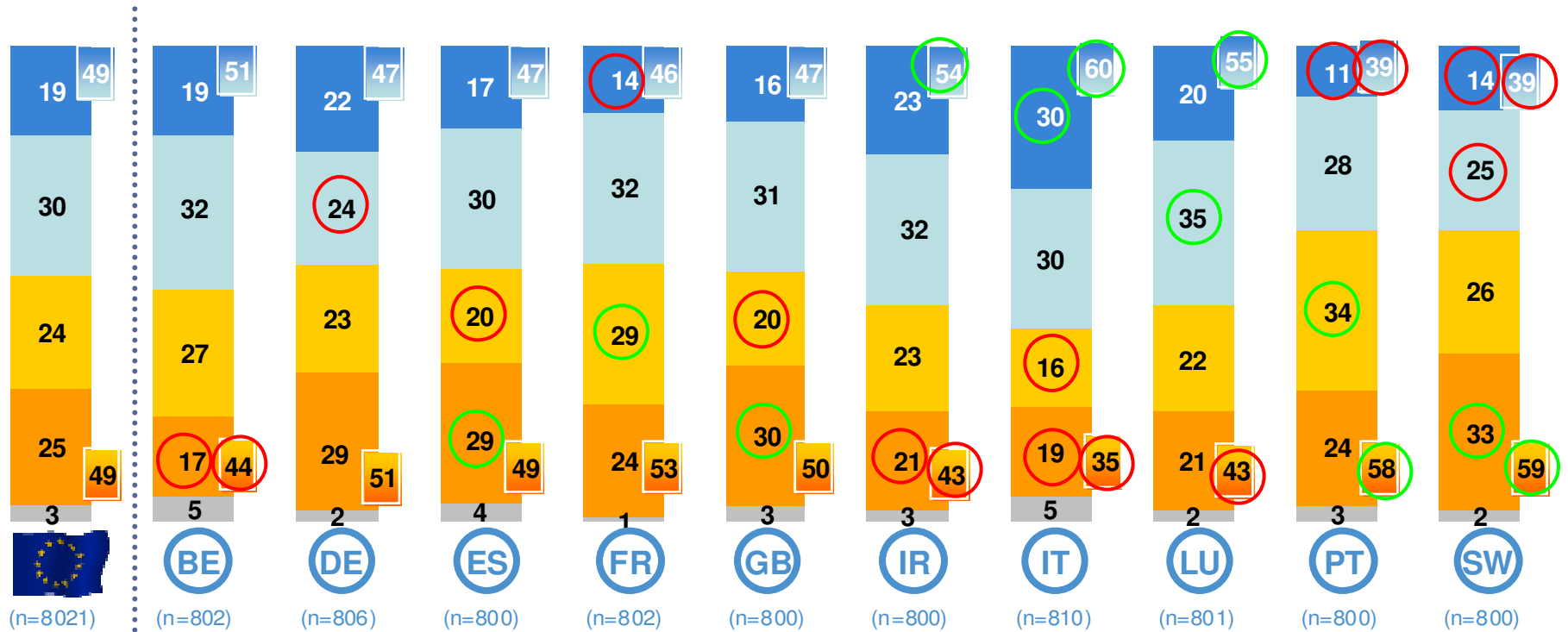
Basis: total sample

Q26. Would you be really very favourable, fairly favourable, fairly against, or totally against an overall reduction of 10km in speed limits to reduce the level of CO2 emissions and pollution linked to motor traffic? (single answer)

In %

New question in 2009

- Very favourable
 - Fairly favourable
 - Fairly against
 - Totally against
 - DK
- ST Favourable**
- ST Against**





Your contact

If you have any questions please contact at AXA Luxembourg :

Nathalie Hanck: Head of Communication and Public relations

Phone : +352 44 24 24 4619 – nathalie.hanck@axa.lu