



## eSafetyChallenge 2011

### Car users' acceptance of eSafety technologies



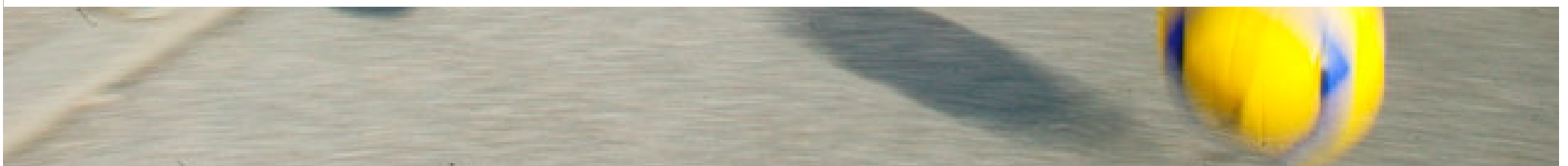
IMK GmbH

May 2011

[www.i-m-k.de](http://www.i-m-k.de)

**IMK**

INSTITUT FÜR ANGEWANDTE MARKETING- UND KOMMUNIKATIONSFORSCHUNG GMBH





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# 1. Background and methodological design

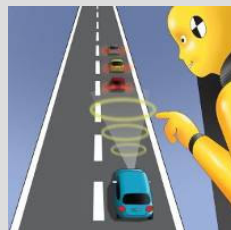
## Background and objectives

- In 2009 a study on car users' acceptance for certain eSafety technologies was carried out through five European countries (France, Germany, Italy, Poland, UK) to support the eSafetyChallenge main event in Vallelunga (Italy).
- Two years later another consumer survey was realised with comparable objectives but on a larger scale. The present consumer survey should serve as an update for the results of 2009 and as documentation support for the eSafetyChallenge main event in Teesdorf (Austria).
- The study should look mainly into personal ratings of car selection criteria and awareness of certain eSafety technologies. Results should be shown for different sub target groups (age groups, gender, carrying a child and experience with dangerous situations in road traffic).
- The study was focused on the following six technologies:

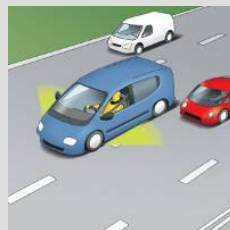
**Electronic Stability Control**



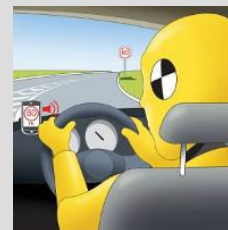
**Advanced Emergency Braking**



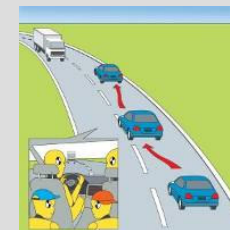
**Blind Spot Monitoring**



**Speed Alert**



**Lane Support System**



**Adaptive Headlights**



# 1. Background and methodological design

## Study design

The study was planned and conducted as an online survey with the goal to achieve 500 opinions of consumers per country.

### Target group

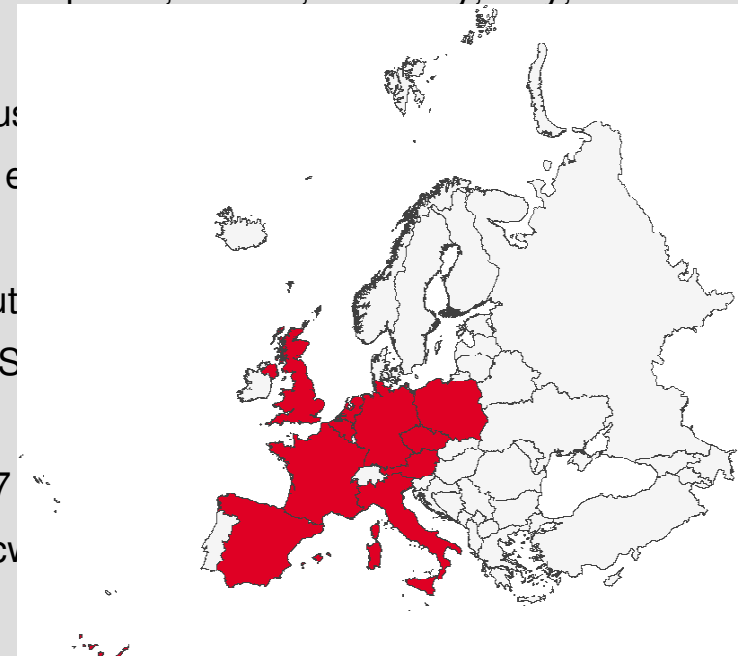
- Consumers who drive a car
- Must be involved in the decision making process when buying a car
- Planning to buy a new car until the end of the year 2012
- Selected countries: Austria, Belgium, Czech Republic, France, Germany, Italy, Netherlands, Poland, Spain, and UK

### Method

- Computer assisted web interviews (CAWI) used
- Total N=5,000 interviews, n=500 interviews e
- Questionnaire in 8 languages
- Duration of questionnaire approx. t=10 minut
- Data analysed with statistical software SPSS

### Timing

- Overall project period cw 46 (2010) to cw 17
- Conducting interviews between cw 10 and cw





# 1. Background and methodological design

## Statistical overview

Sub target groups have been quoted to compare them on a similar base: Four age groups each with 25%, gender and the item carrying children\* each with 50:50.

	Realised interviews (N)	Age groups				Gender		Carrying children*	
		18-24	25-34	35-49	50+	male	female	yes	no
<b>Total</b>	<b>5,011</b>	<b>1,243</b>	<b>1,258</b>	<b>1,256</b>	<b>1,254</b>	<b>2,503</b>	<b>2,508</b>	<b>2,503</b>	<b>2,508</b>
Germany	500	125	126	124	125	250	250	254	246
France	500	125	125	125	125	250	250	250	250
Italy	502	126	126	125	125	251	251	258	244
UK	501	125	126	125	125	251	250	252	249
Poland	502	125	125	125	127	250	252	252	250
Austria	500	125	125	126	124	250	250	250	250
Belgium	501	119	128	128	126	251	250	248	253
Czech Republic	500	125	125	125	125	250	250	253	247
The Netherlands	502	122	126	127	127	248	254	246	256
Spain	503	126	126	126	125	252	251	251	252

\*Usually, do you carry a child or children of the age from 0 till 18 years on your vehicle?



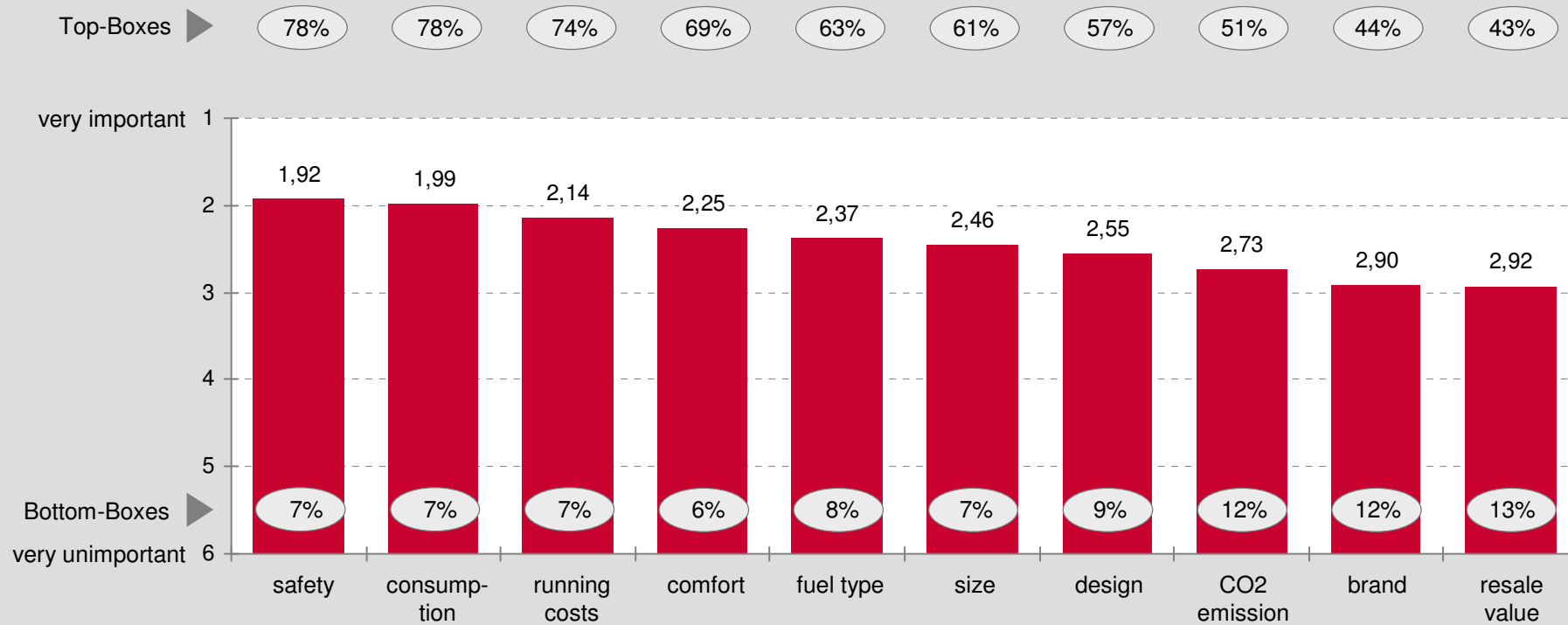
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  - 3.4 Comparison of eSafety technologies



## 2. Management Summary

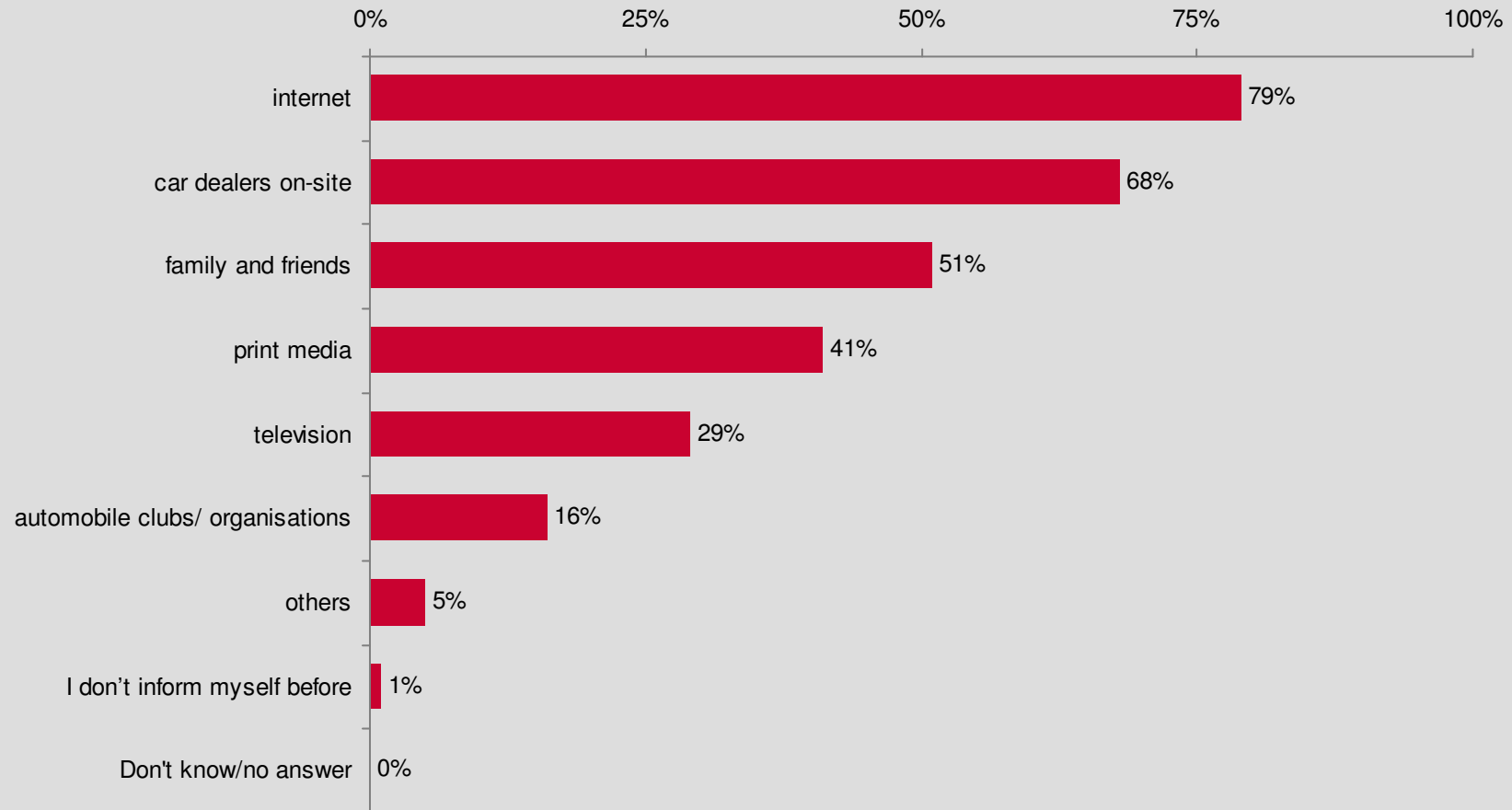
### Rating of importance of car selection criteria





## 2. Management Summary

### Sources of information



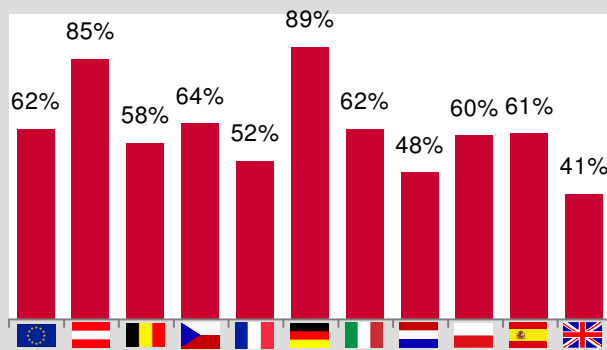


## 2. Management Summary

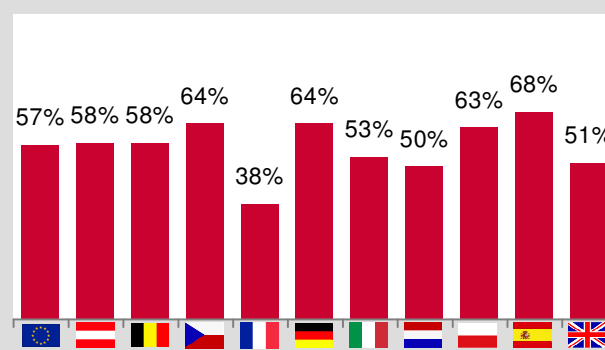
### Awareness of eSafety systems



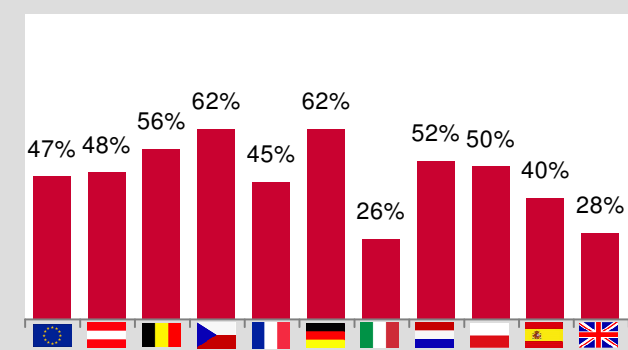
**Electronic Stability Control**



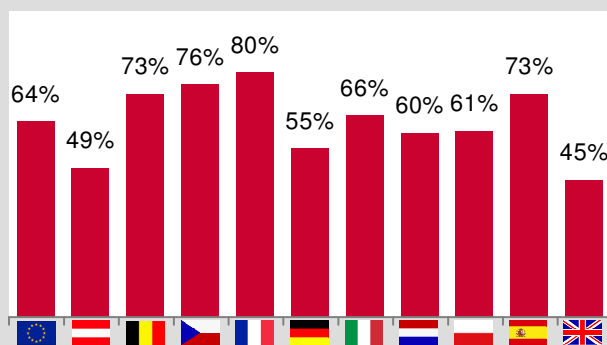
**Advanced Emergency Braking**



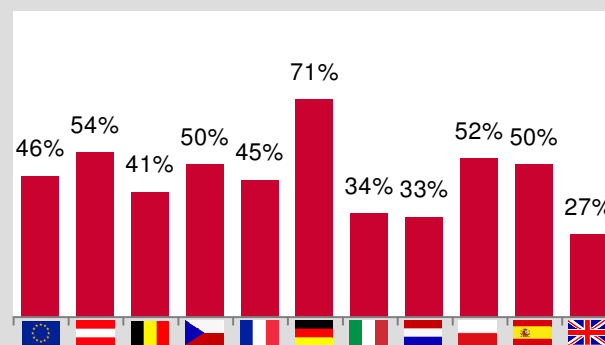
**Blind Spot Monitoring**



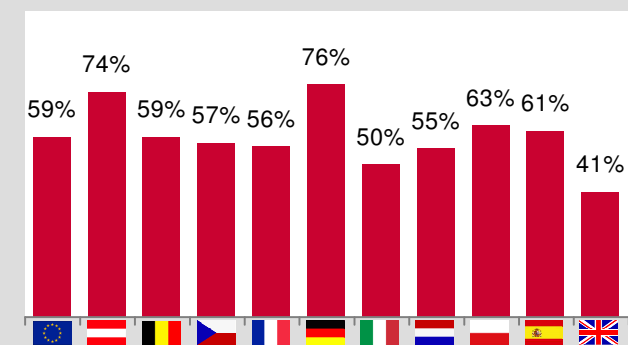
**Speed Alert**



**Lane Support Systems**

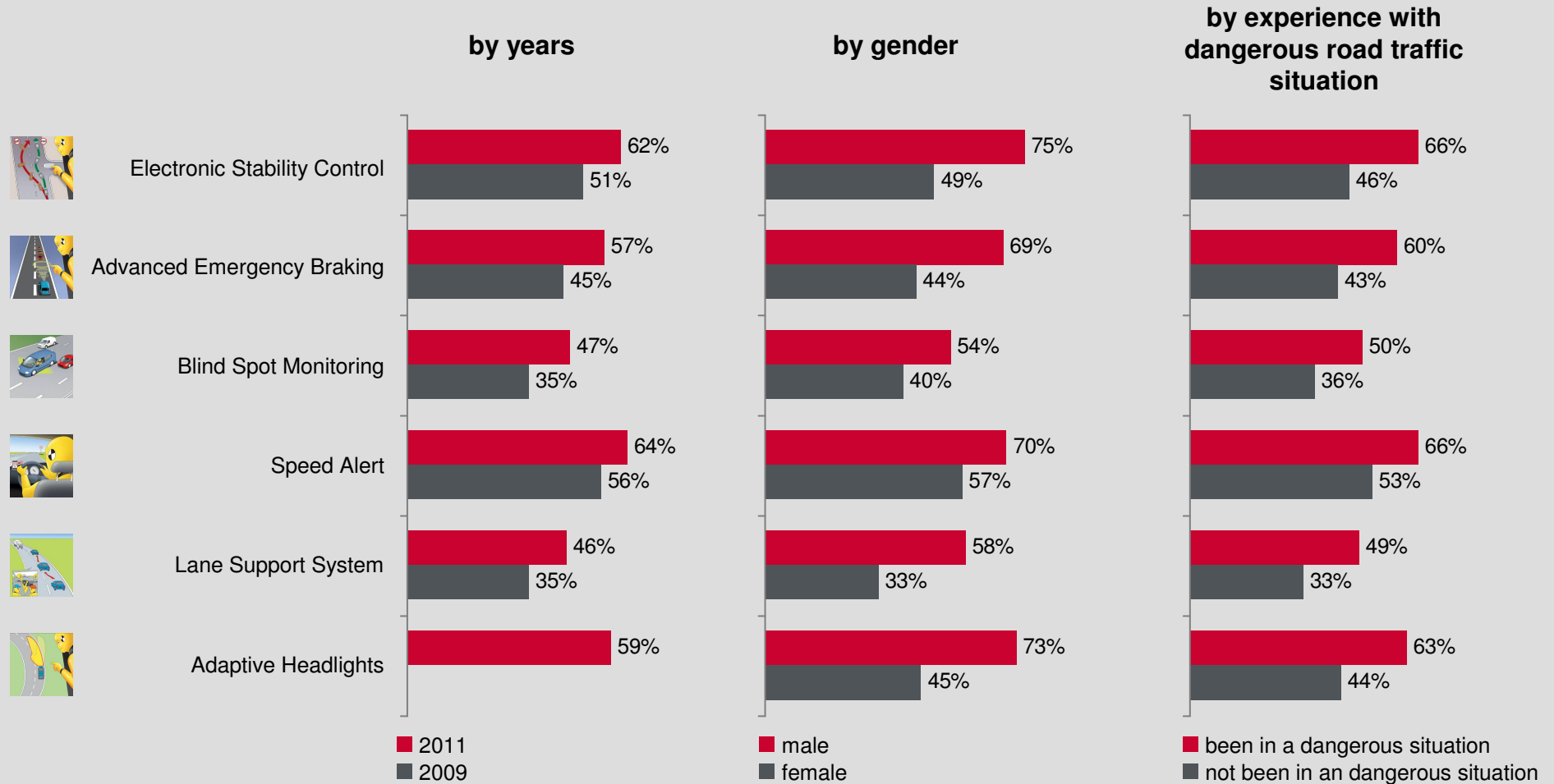


**Adaptive Headlights**



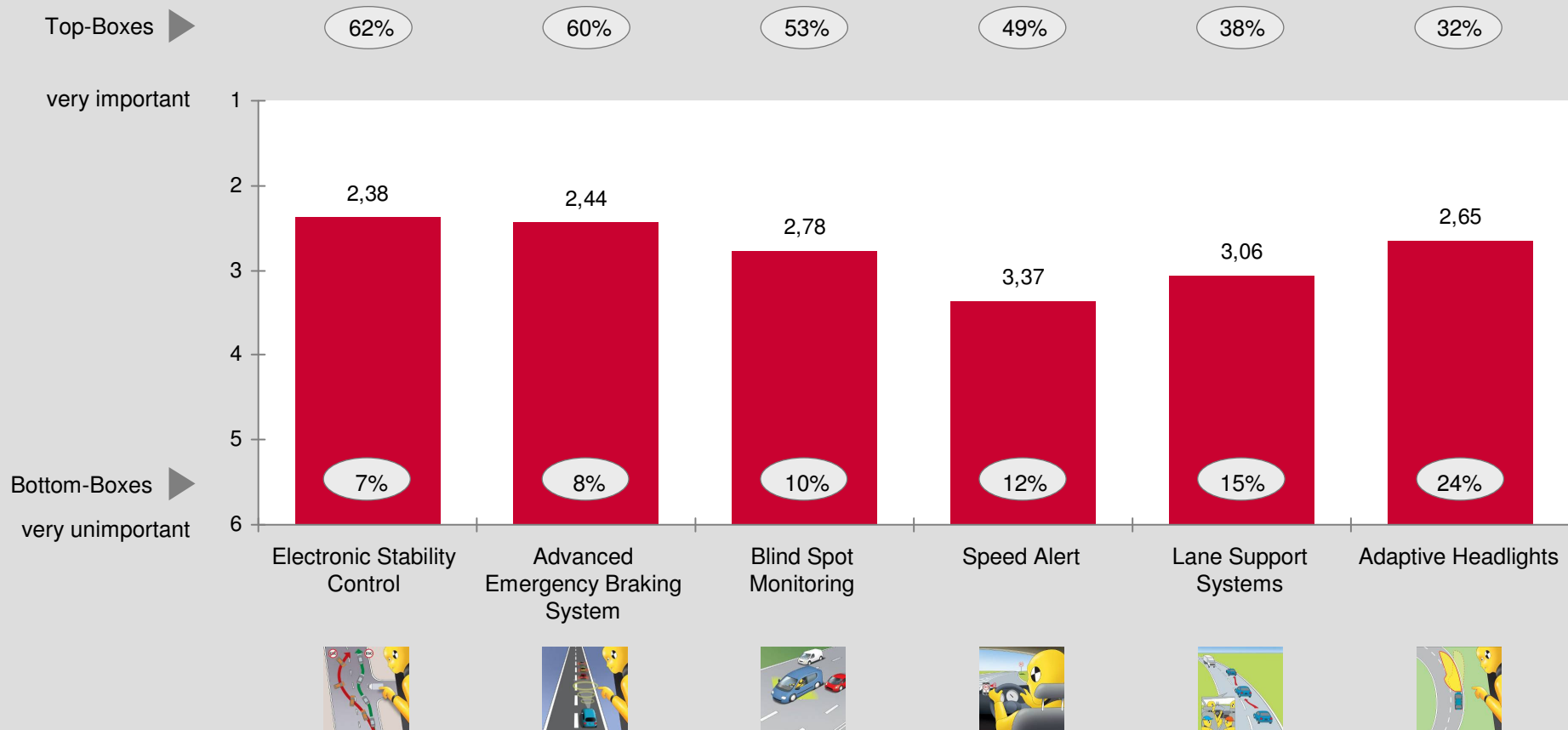
## 2. Management Summary

### Awareness of eSafety systems



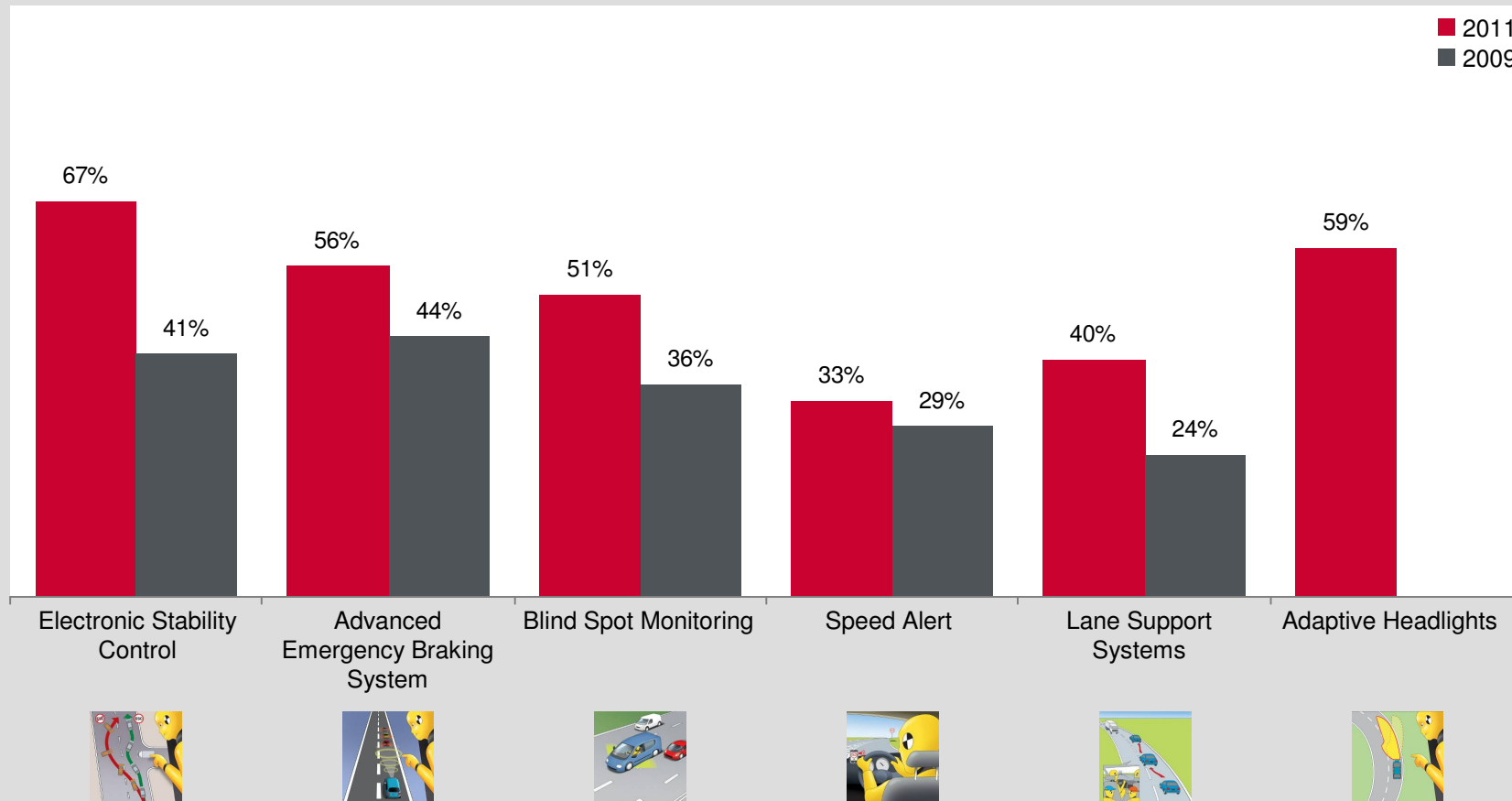
## 2. Management Summary

### Rating of importance of eSafety systems



## 2. Management Summary

### Willingness to pay extra for eSafety systems



only answers with "yes"



## 2. Management Summary

### Key messages

1. Safety has the highest importance of all car selection criteria but for younger consumers it is much lower than for older
2. Awareness of each tested eSafety system increased since 2009
3. Willingness to pay extra for eSafety systems increased since 2009
4. Big differences of consumer awareness by systems and countries
5. Awareness of eSafety systems for women much lower than for men
6. People with experience in a dangerous road traffic situation show higher levels of awareness
7. eSafety systems with highest importance are Electronic Stability Control and Advanced Emergency Braking, lowest importance for Speed Alert and Lane Support Systems
8. People who experienced a dangerous situation in road traffic rate the importance of eSafety systems higher
9. Consumers want the manufacturers to ensure that they drive a safe car and/but the car dealers on-site are considered to be the one informing the consumers at first (besides the main source of information internet)



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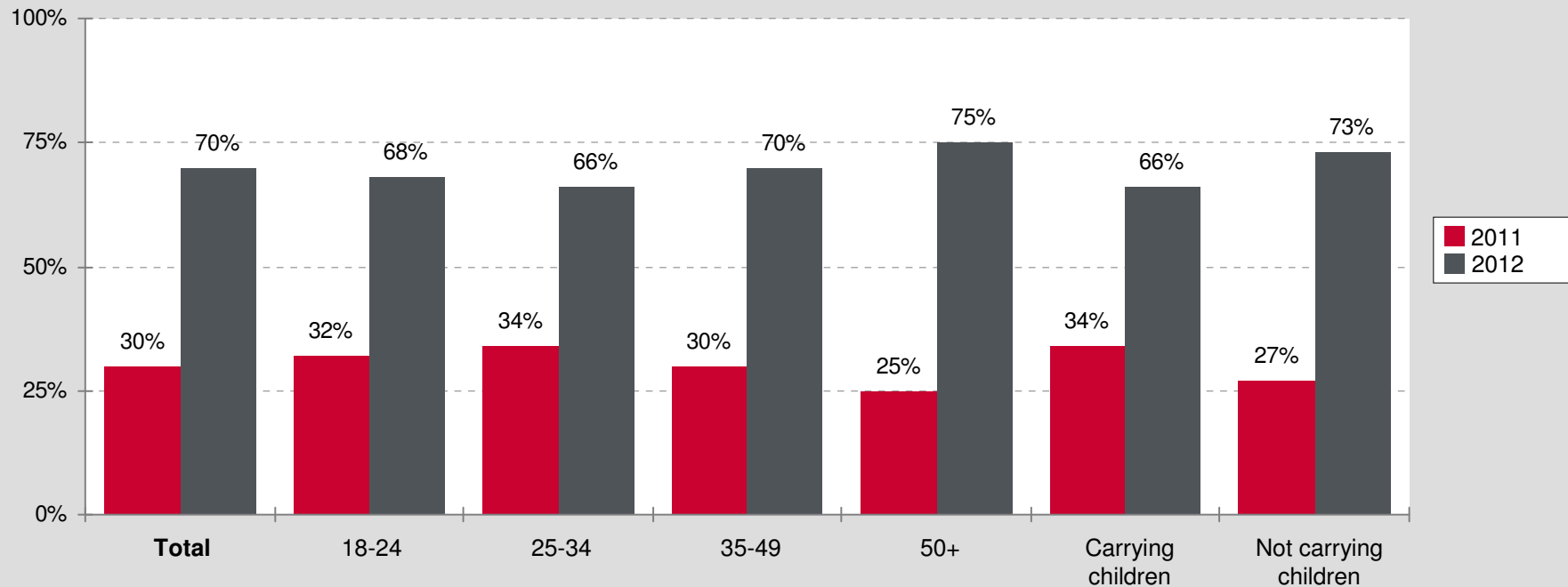


### 3. Results

#### 3.1 Characteristics of European drivers



Do you plan to buy a new car until the end of the year 2012?



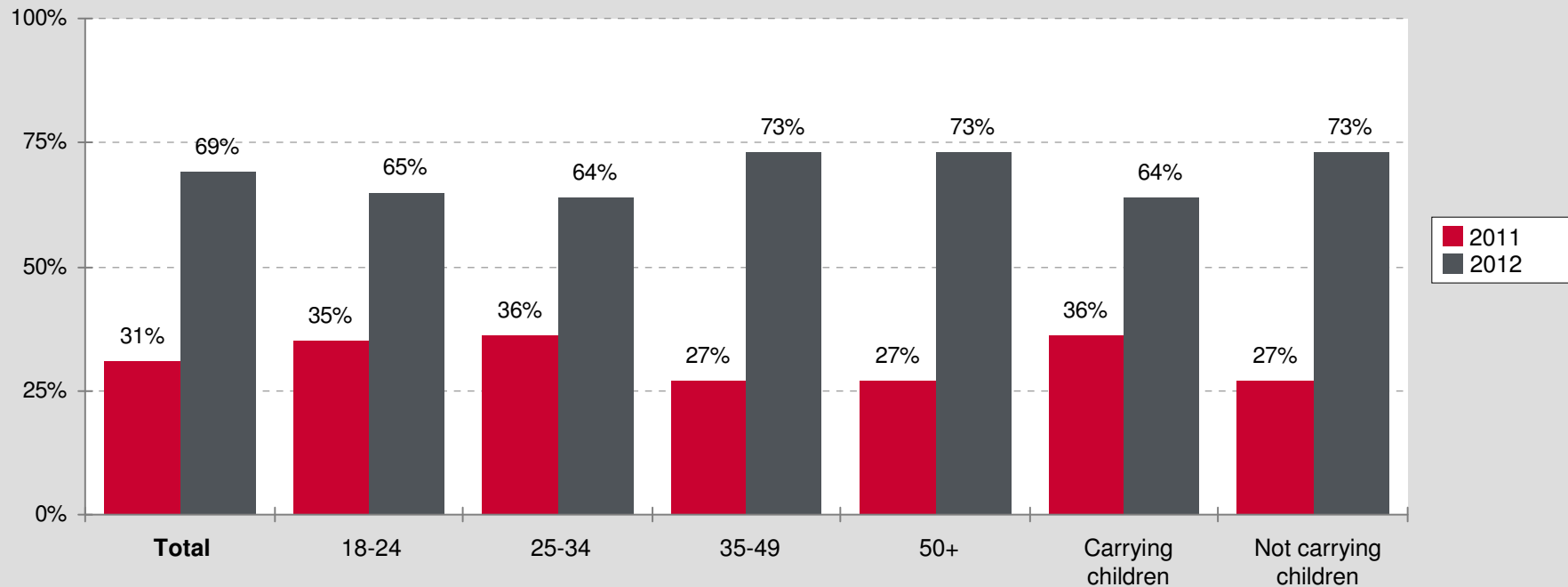


### 3. Results

#### 3.1 Characteristics of European drivers



Do you plan to buy a new car until the end of the year 2012?





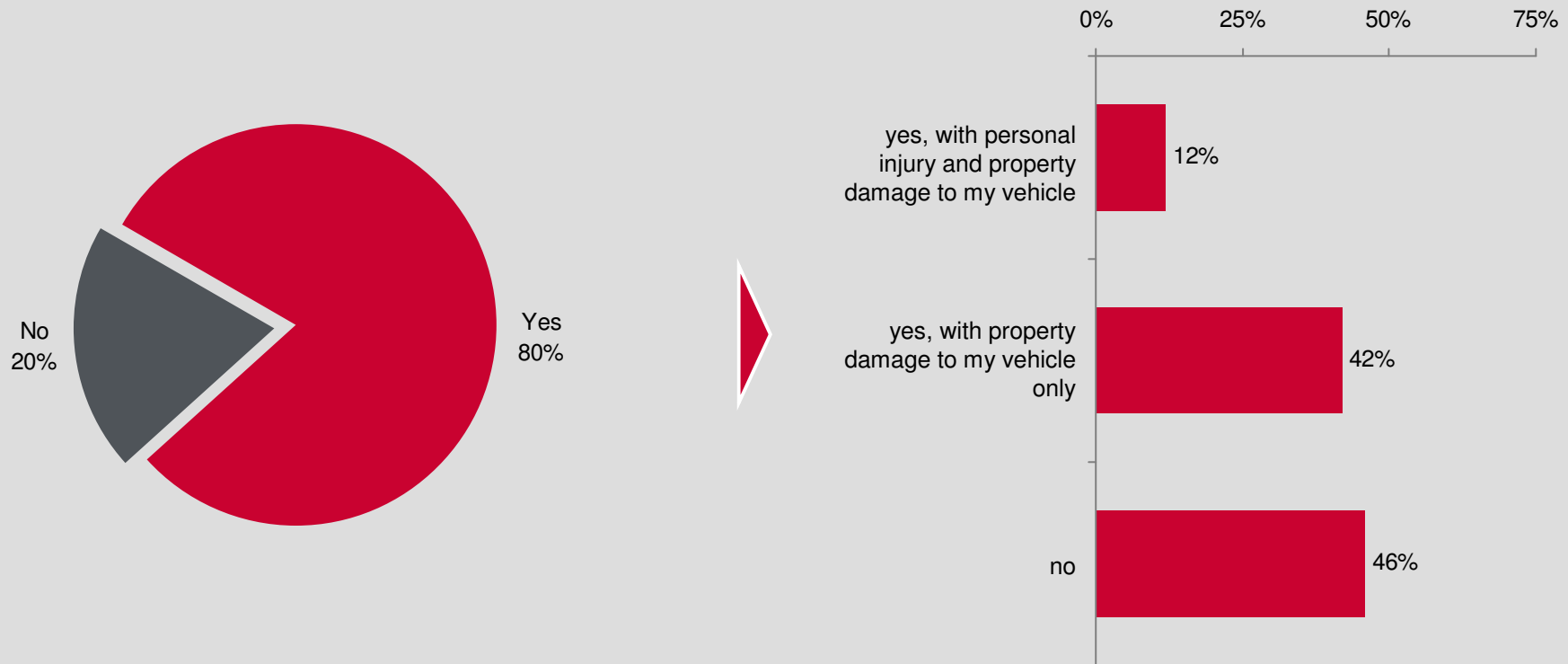


### 3. Results

#### 3.1 Characteristics of European drivers



**Have you ever been in a dangerous situation in road traffic?  
Did it result in an accident or damage to your vehicle? (filter: only "yes")**



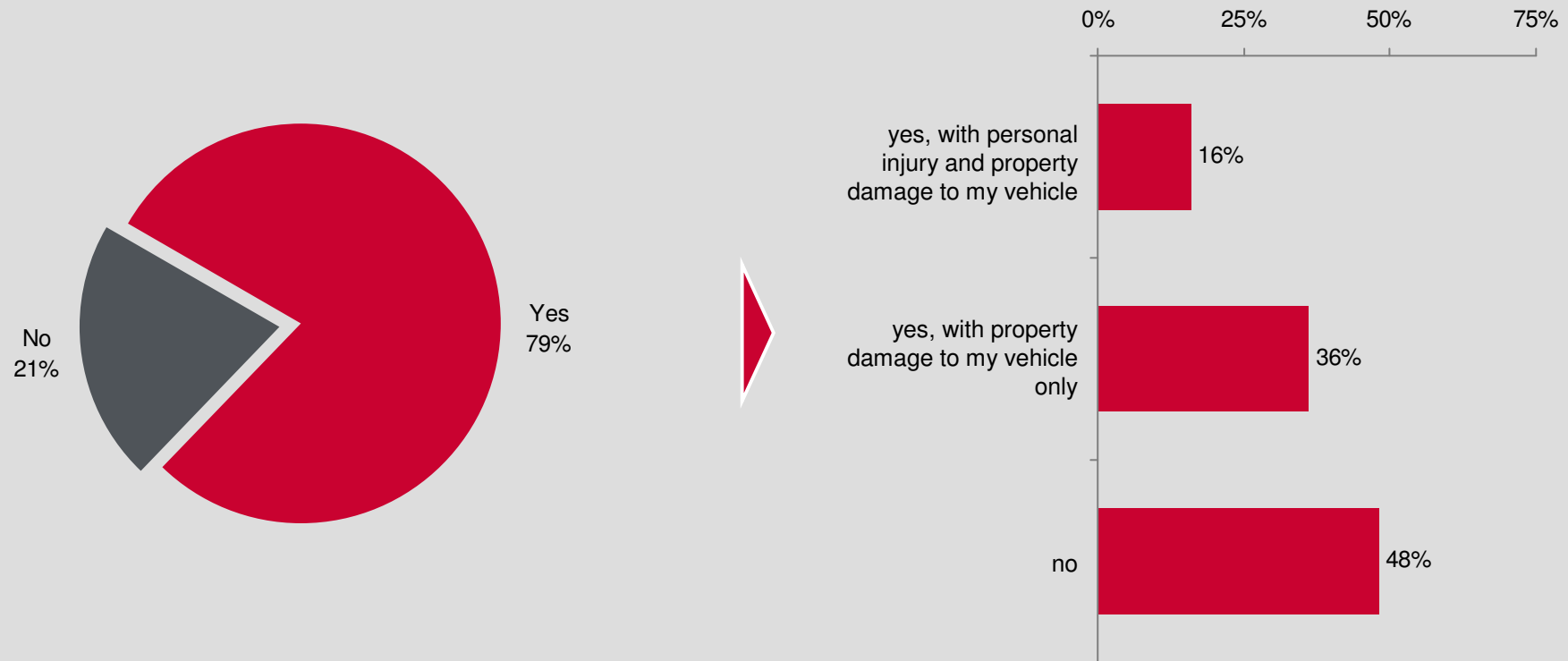


### 3. Results

#### 3.1 Characteristics of European drivers



**Have you ever been in a dangerous situation in road traffic?  
Did it result in an accident or damage to your vehicle? (filter: only "yes")**



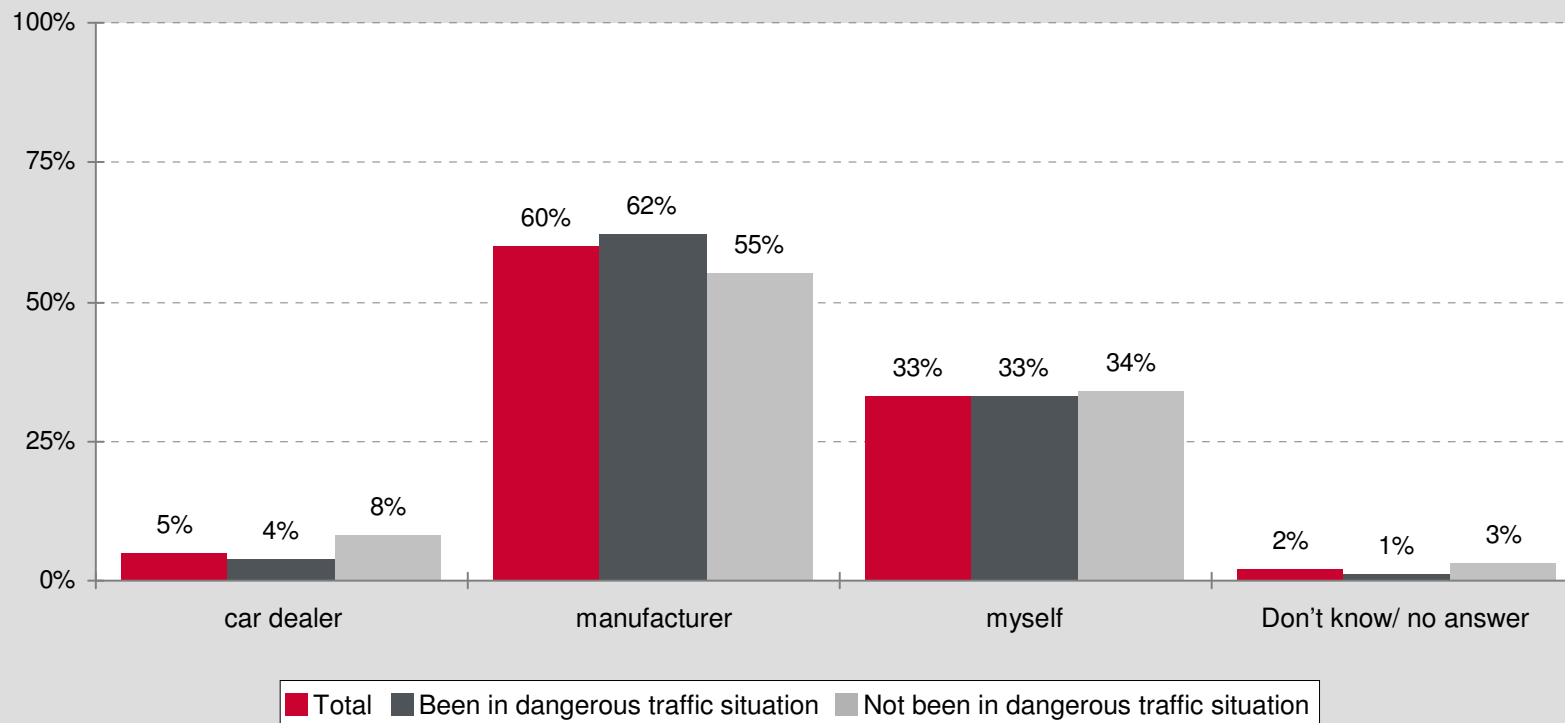


### 3. Results

#### 3.1 Characteristics of European drivers



Who should be mainly responsible to ensure that your car is a safe car?



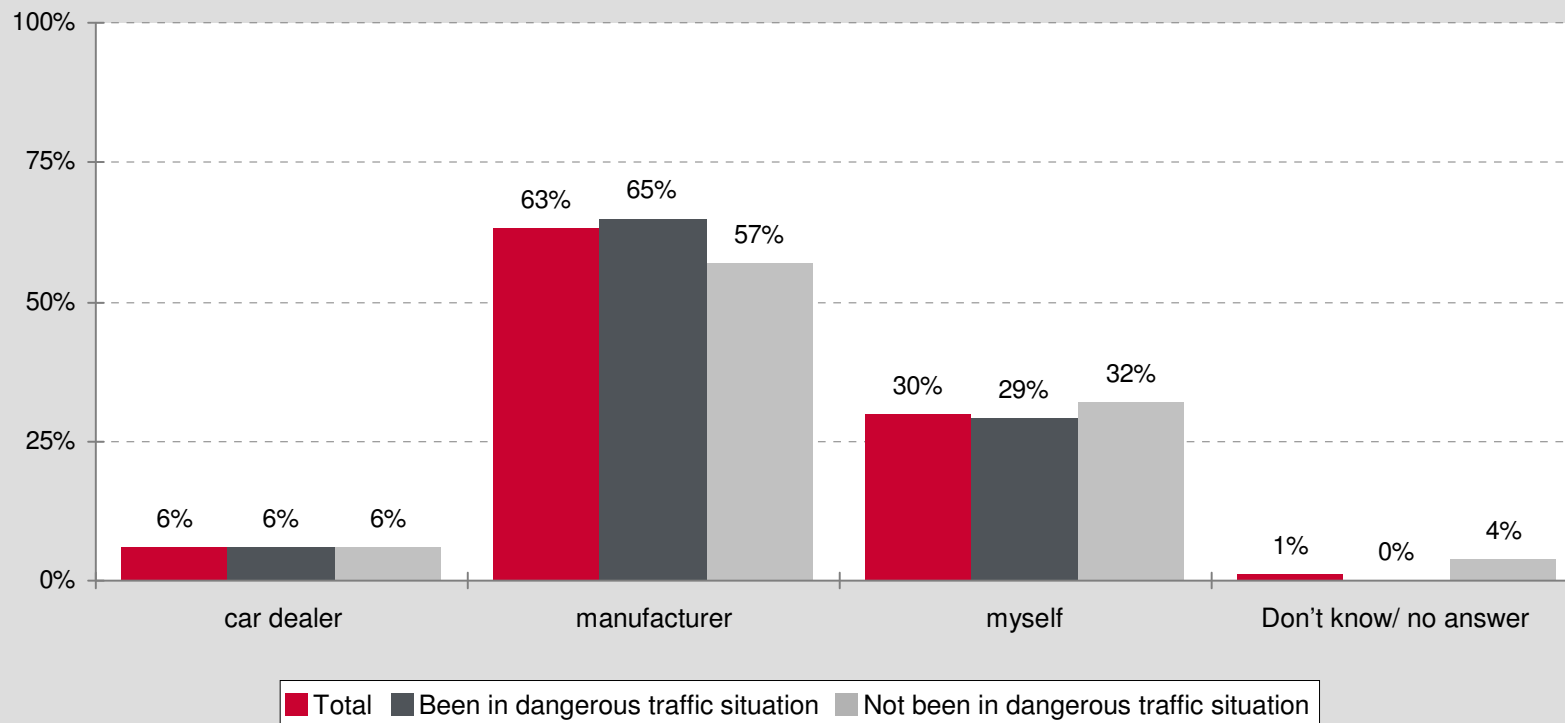


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#### 3.1 Characteristics of European drivers



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## 3. Results

### 3.2 Information and purchasing decision



Where do you get information from when buying a new car? (multiple answers possible)





## 3. Results

### 3.2 Information and purchasing decision



Where do you get information from when buying a new car? (multiple answers possible)

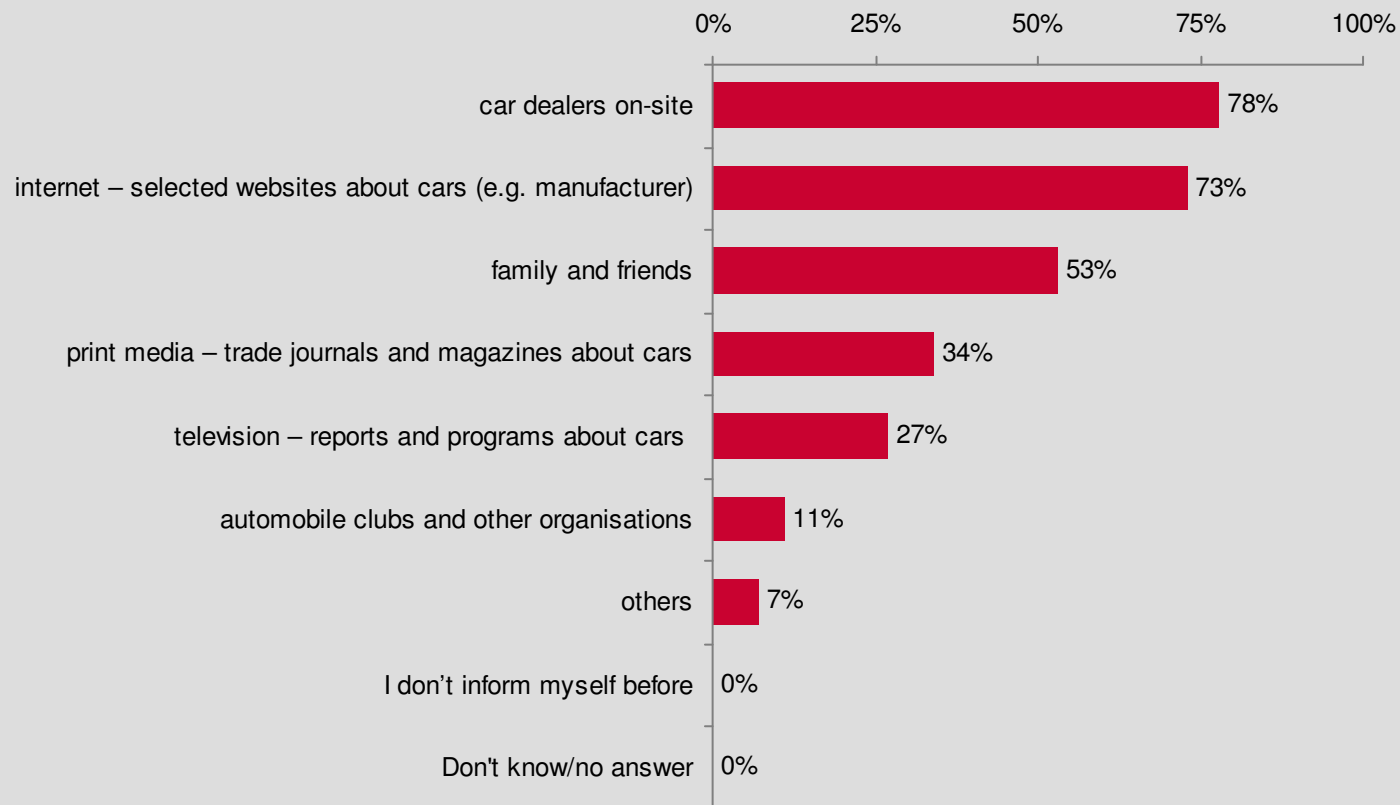
	total	age				gender		carrying children		been in a dangerous traffic situation	
		18-24	25-34	35-49	50+	male	female	yes	no	yes	no
internet	<b>79%</b>	84%	85%	79%	70%	82%	76%	79%	80%	81%	71%
car dealers	<b>68%</b>	64%	66%	68%	73%	69%	67%	69%	67%	68%	67%
family and friends	<b>51%</b>	66%	59%	43%	37%	43%	60%	52%	50%	52%	50%
print media	<b>41%</b>	42%	41%	41%	40%	45%	37%	42%	40%	44%	28%
television	<b>29%</b>	34%	32%	29%	22%	30%	27%	31%	26%	31%	21%
automobile clubs and other organisations	<b>16%</b>	19%	18%	15%	12%	17%	14%	18%	13%	16%	13%
others	<b>5%</b>	4%	5%	6%	6%	6%	4%	5%	6%	6%	3%
I don't inform myself before	<b>1%</b>	1%	0%	1%	2%	1%	1%	1%	1%	1%	1%
Don't know/no answer	<b>0%</b>	0%	0%	0%	---	0%	0%	0%	0%	0%	0%

## 3. Results

### 3.2 Information and purchasing decision



Where do you get information from when buying a new car? (multiple answers possible)







## 3. Results

### 3.2 Information and purchasing decision



Where do you get information from when buying a new car? (multiple answers possible)

	total	age				gender		carrying children		been in a dangerous traffic situation	
		18-24	25-34	35-49	50+	male	female	yes	no	yes	no
car dealers on-site	<b>78%</b>	77%	77%	80%	78%	78%	78%	79%	77%	78%	79%
internet	<b>73%</b>	78%	82%	76%	58%	75%	72%	72%	75%	79%	68%
family and friends	<b>53%</b>	59%	56%	47%	50%	45%	60%	55%	50%	60%	45%
print media	<b>34%</b>	36%	35%	33%	34%	38%	31%	33%	35%	34%	34%
television	<b>27%</b>	33%	30%	26%	21%	26%	29%	35%	20%	42%	19%
automobile clubs and other organisations	<b>11%</b>	17%	11%	13%	3%	12%	10%	15%	8%	19%	6%
others	<b>7%</b>	7%	7%	7%	5%	8%	5%	6%	7%	6%	5%
I don't inform myself before	<b>0%</b>	---	---	1%	---	0%	---	---	0%	---	1%
Don't know/no answer	<b>0%</b>	---	1%	---	---	---	0%	0%	---	1%	---

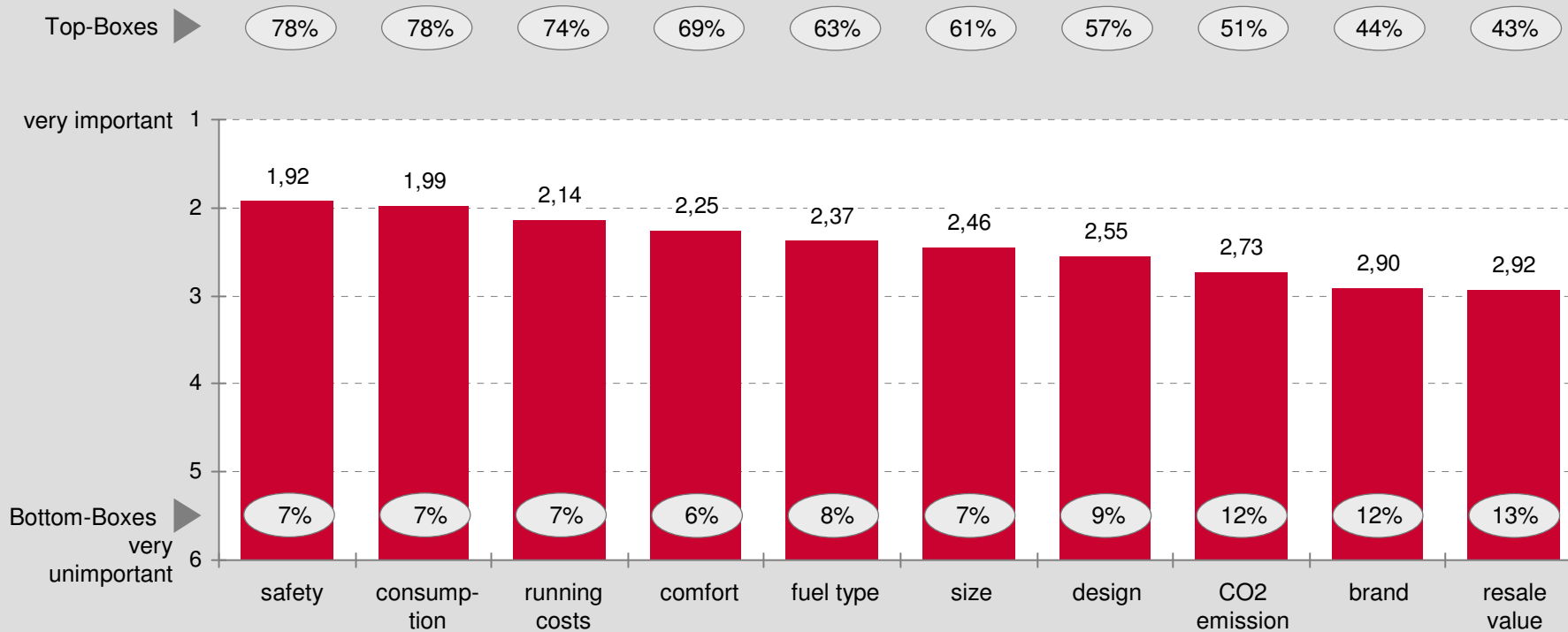


### 3. Results

#### 3.2 Information and purchasing decision



When deciding which car to buy, how important are the following criteria to you personally?



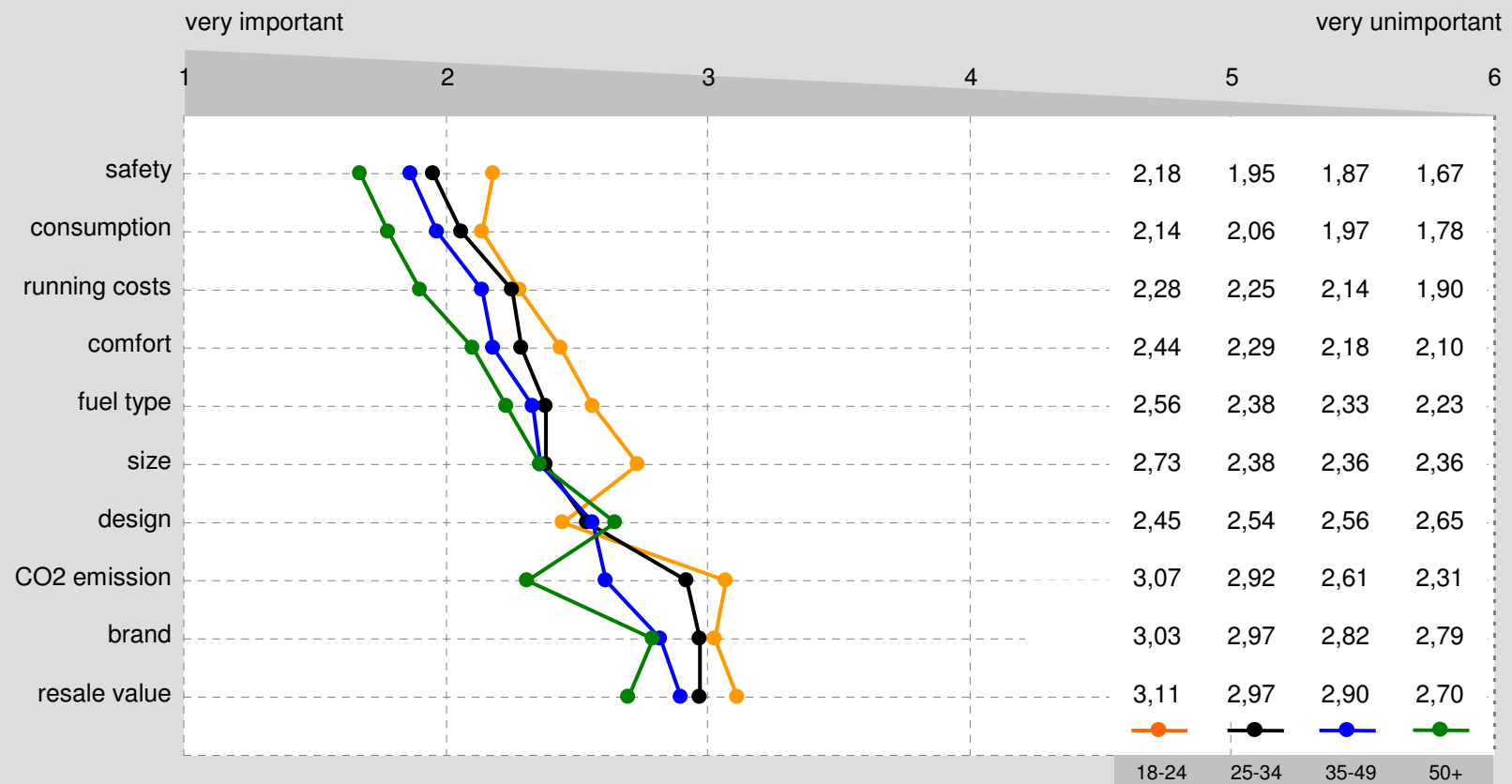


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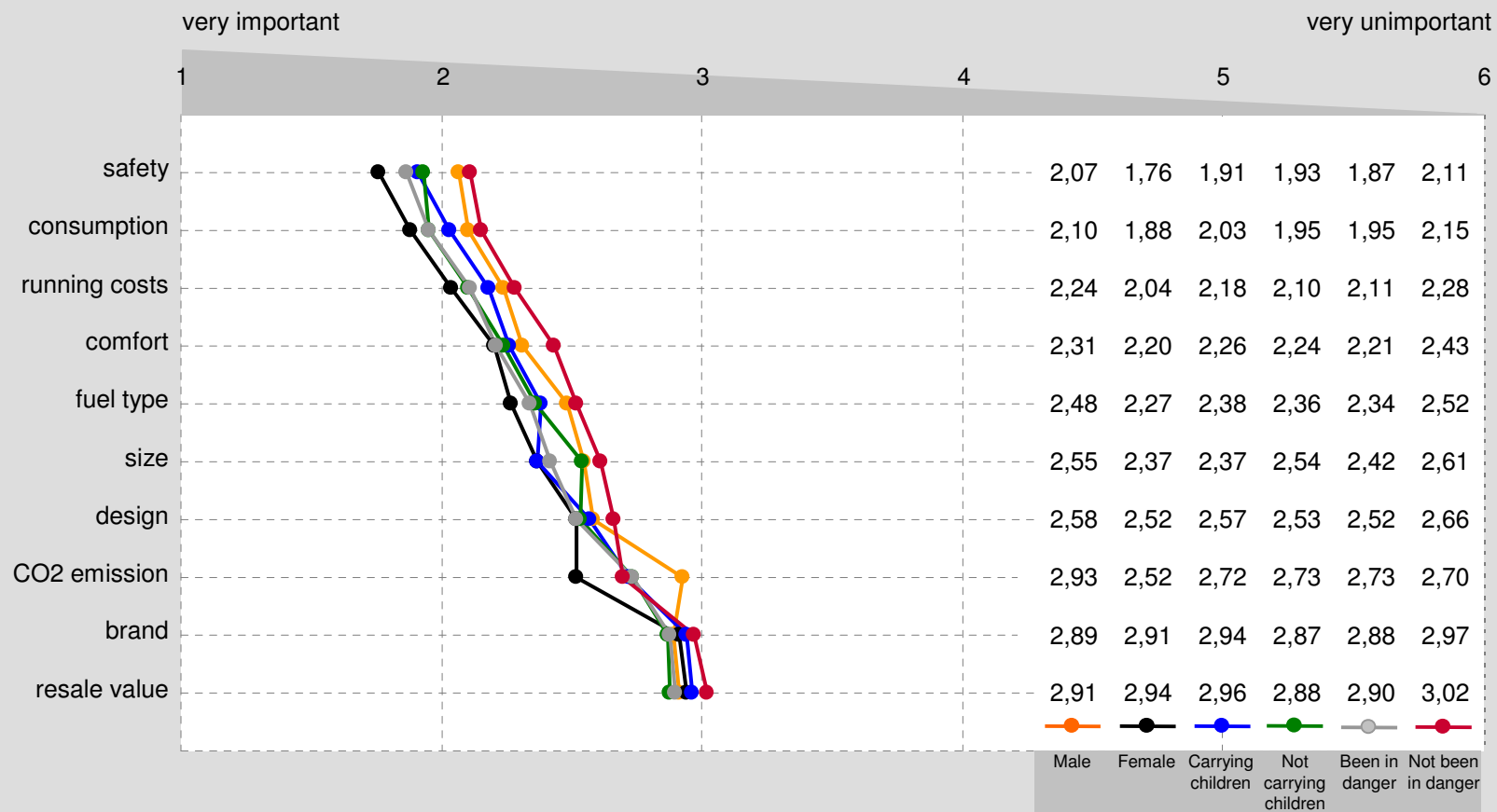


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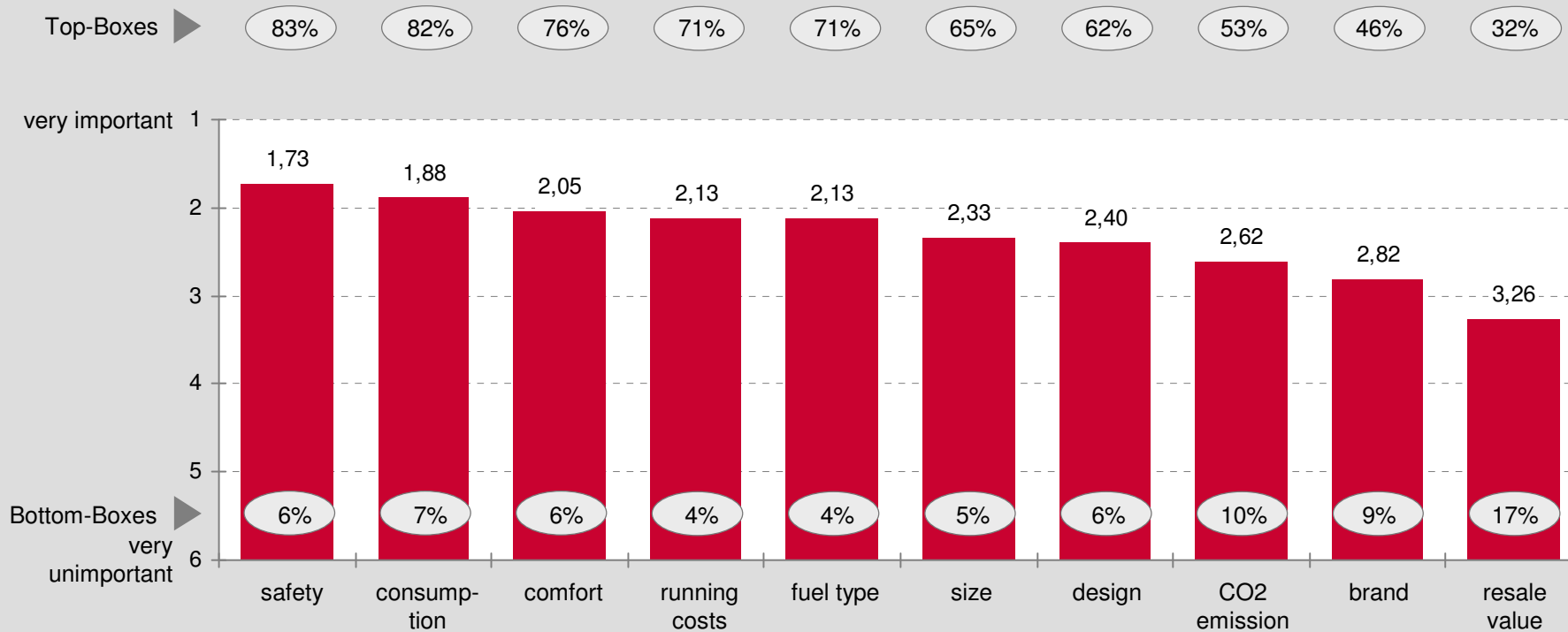


### 3. Results

#### 3.2 Information and purchasing decision



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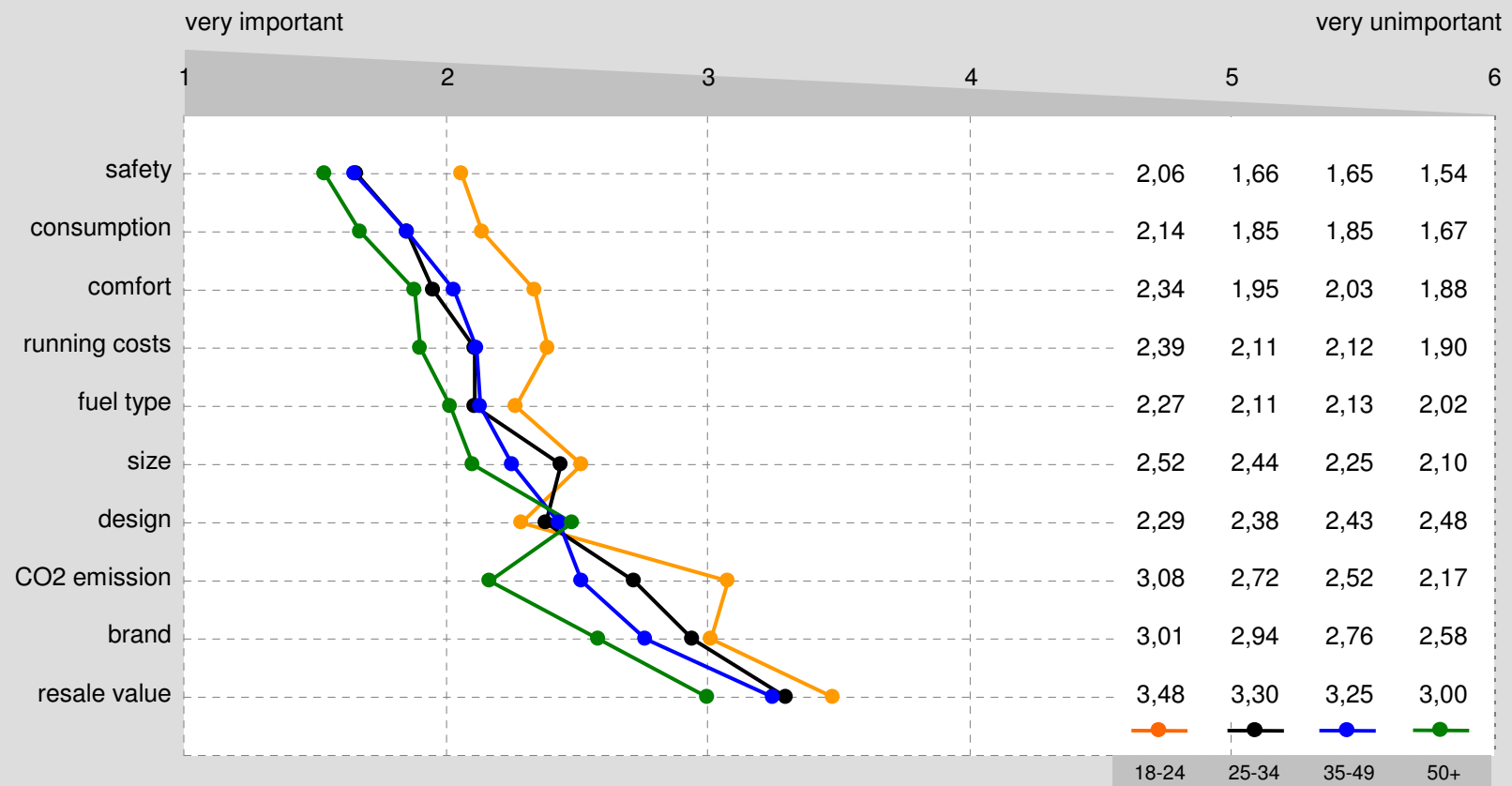


### 3. Results

#### 3.2 Information and purchasing decision



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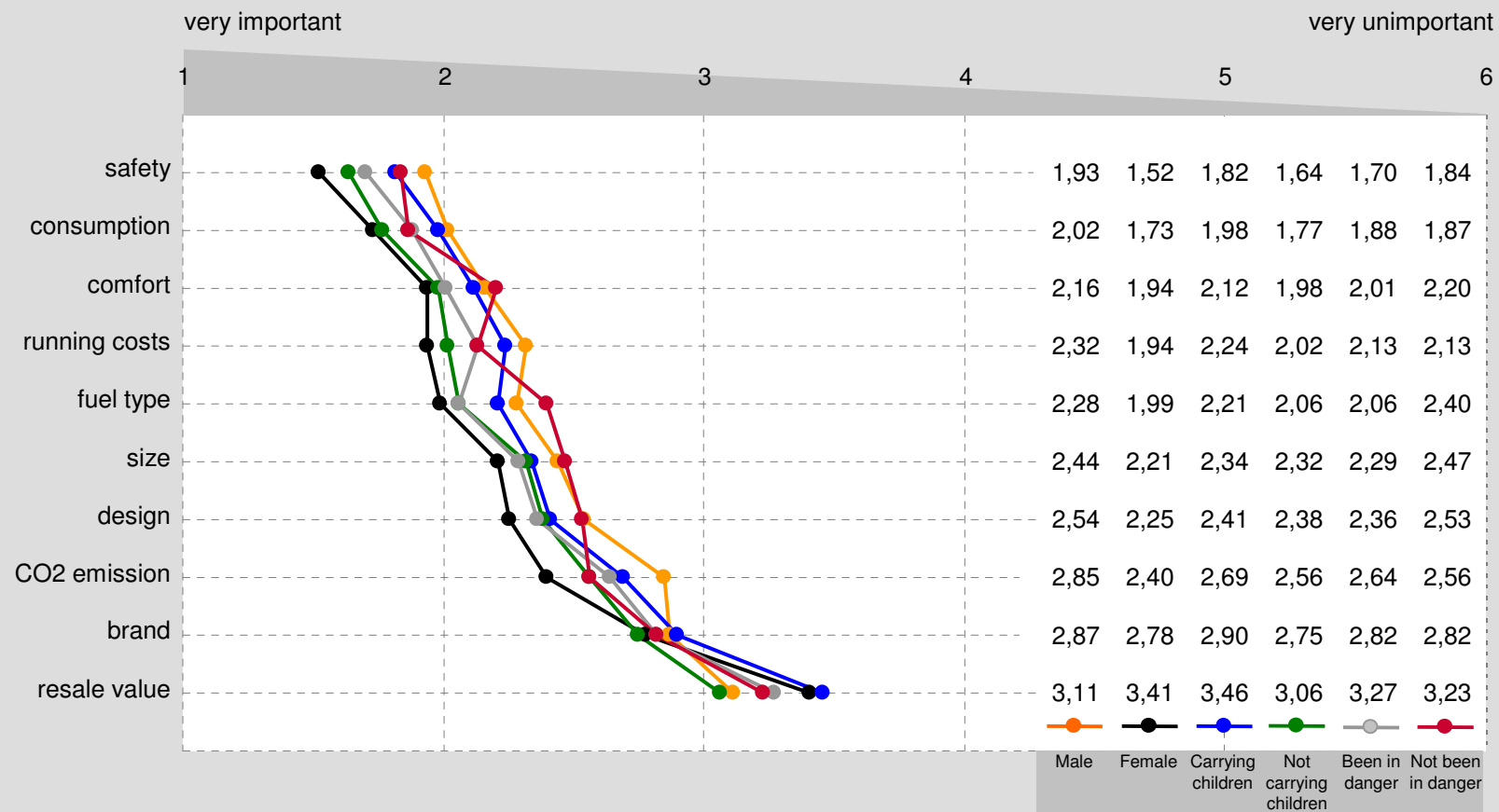


### 3. Results

#### 3.2 Information and purchasing decision



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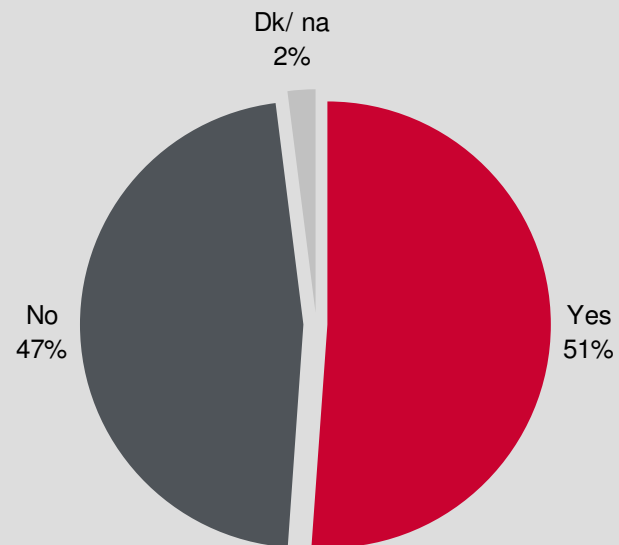
## 3.3 eSafety technologies

### 3.3.1 Electronic Stability Control

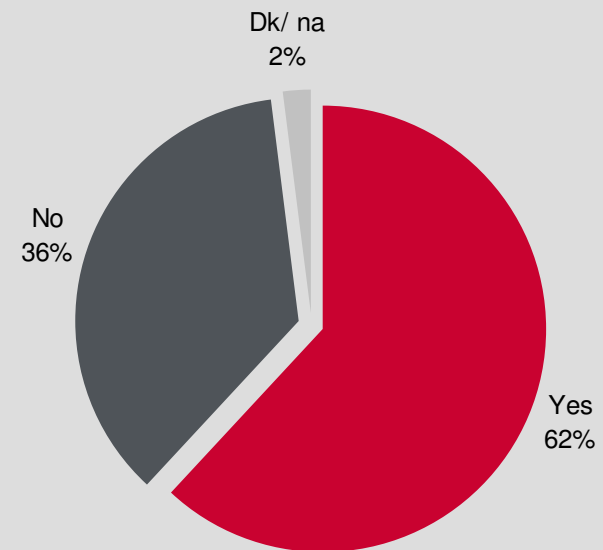


Have you ever heard of Electronic Stability Control?

2009



2011

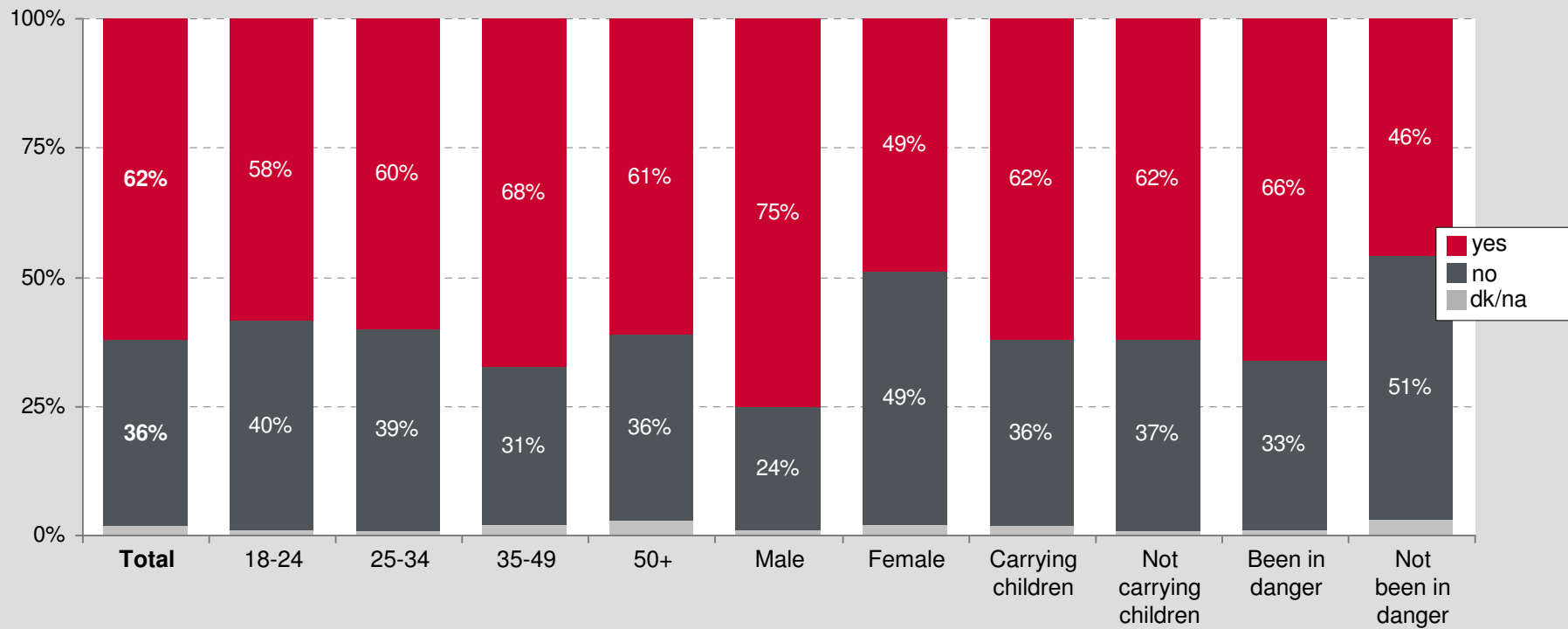


## 3.3 eSafety technologies

### 3.3.1 Electronic Stability Control



Have you ever heard of Electronic Stability Control?

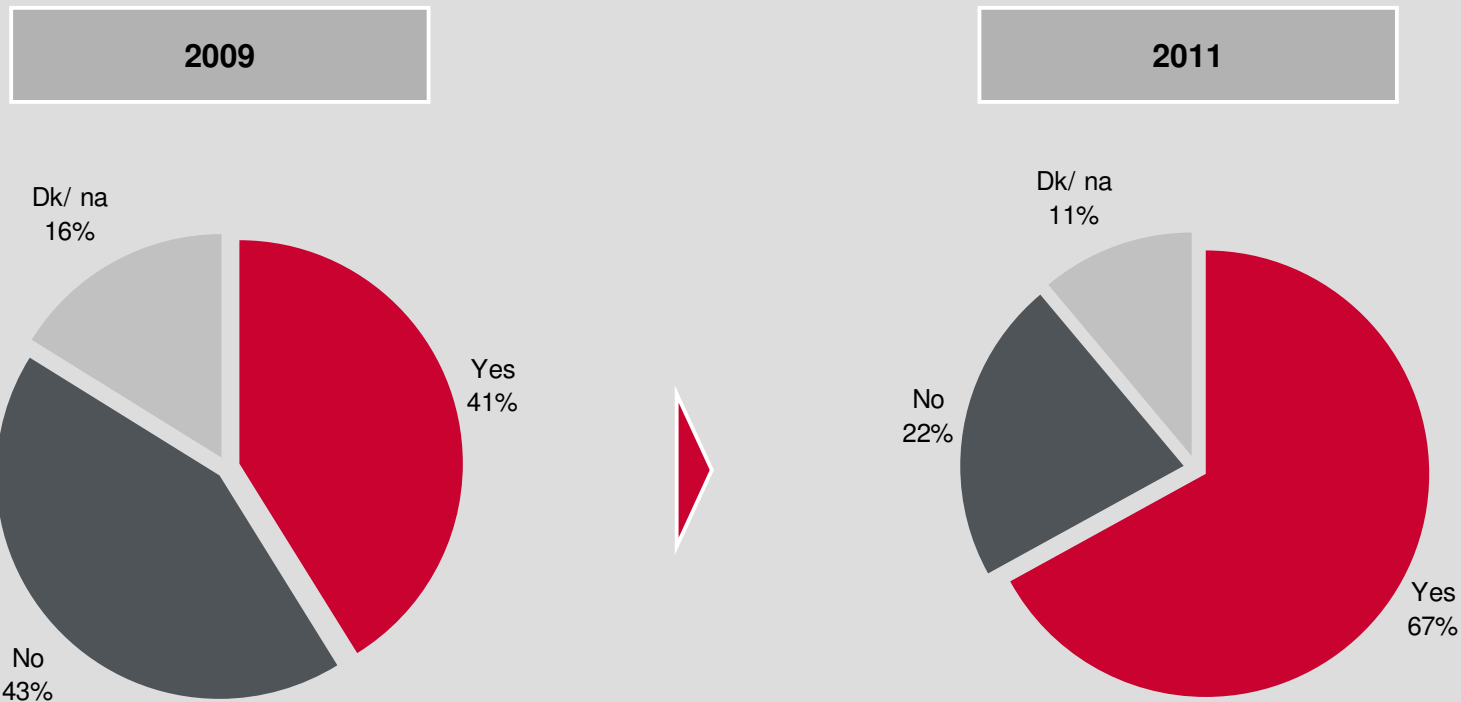


## 3.3 eSafety technologies

### 3.3.1 Electronic Stability Control



Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?

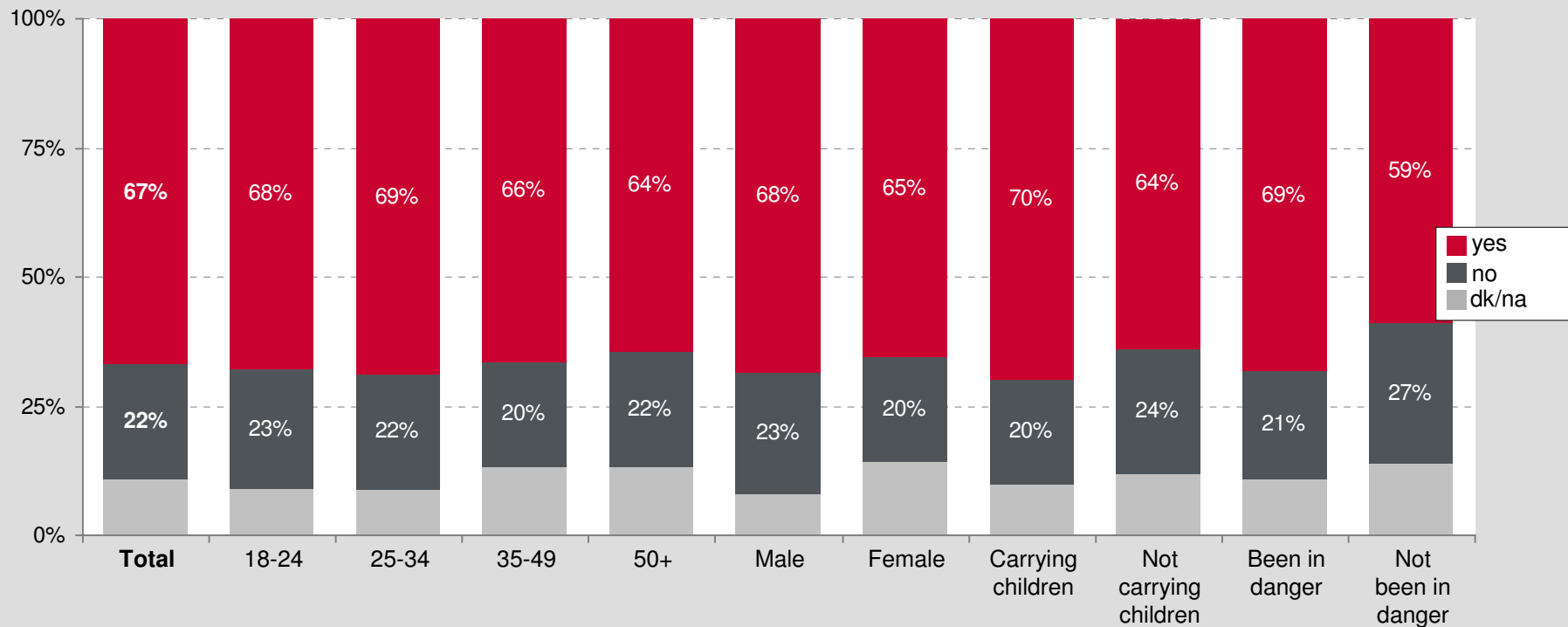


## 3.3 eSafety technologies

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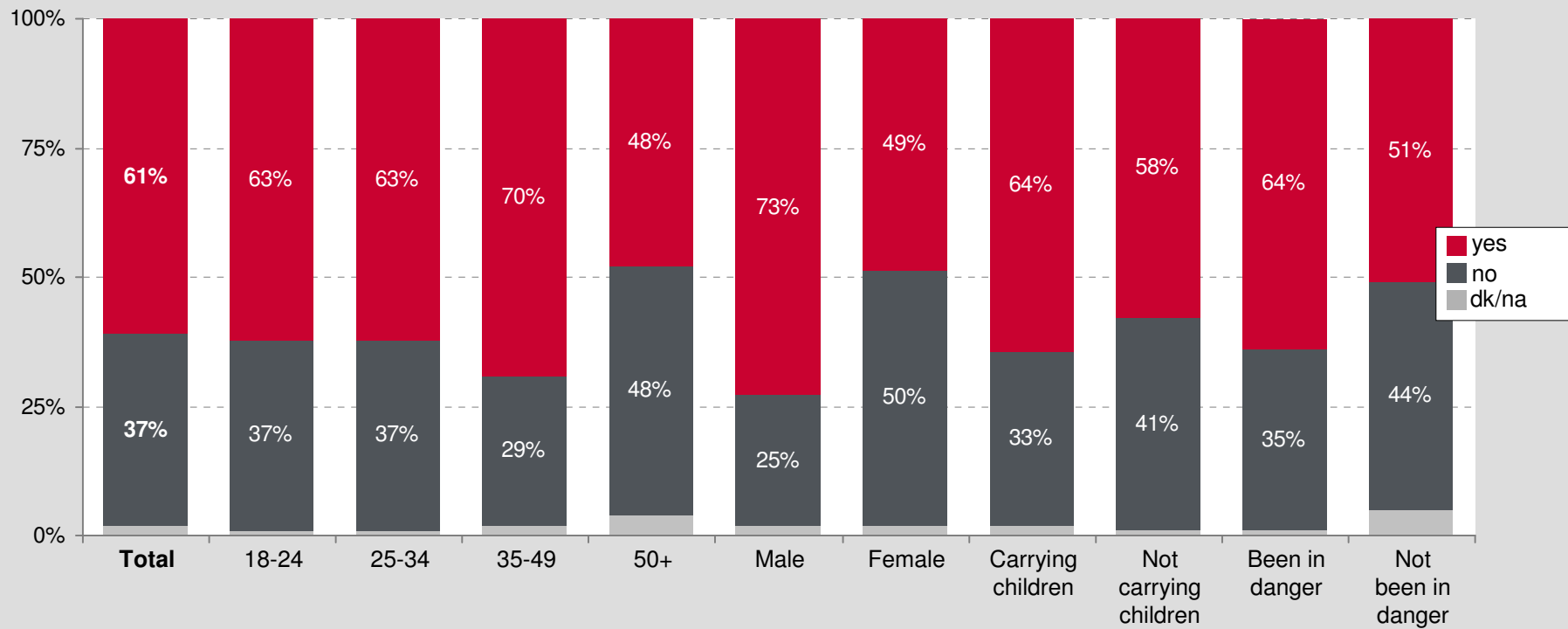


## 3.3 eSafety technologies

### 3.3.1 Electronic Stability Control



Have you ever heard of Electronic Stability Control?

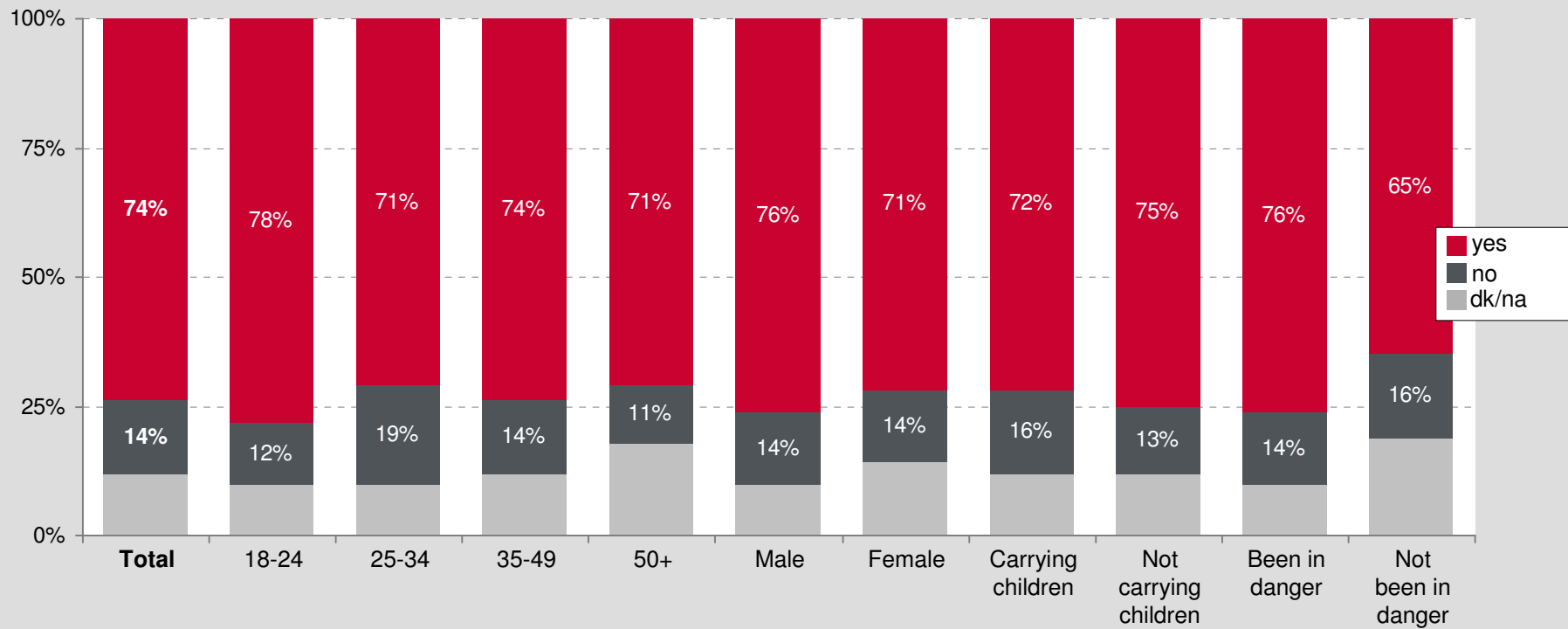


## 3.3 eSafety technologies

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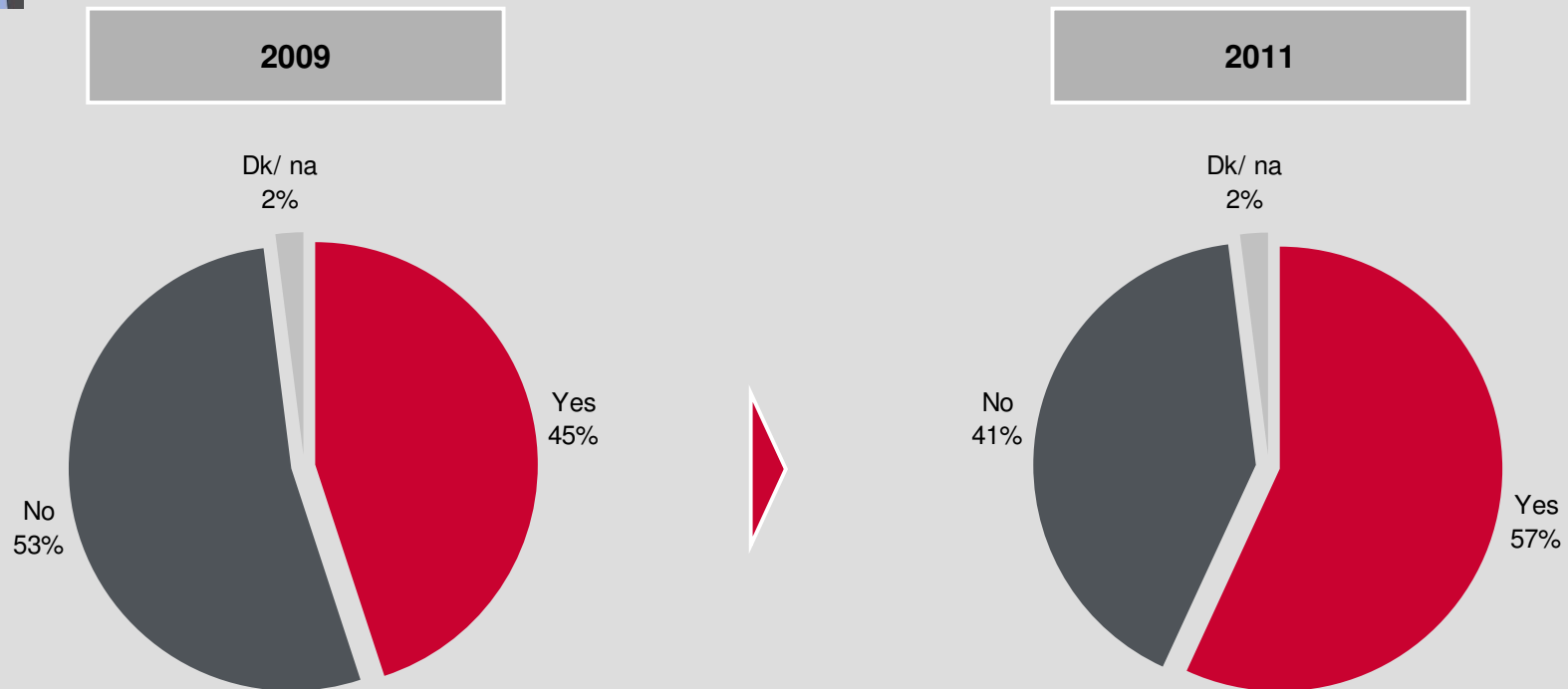
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### 3.3 eSafety technologies

#### 3.3.2 Advanced Emergency Braking



Have you ever heard of Advanced Emergency Braking?



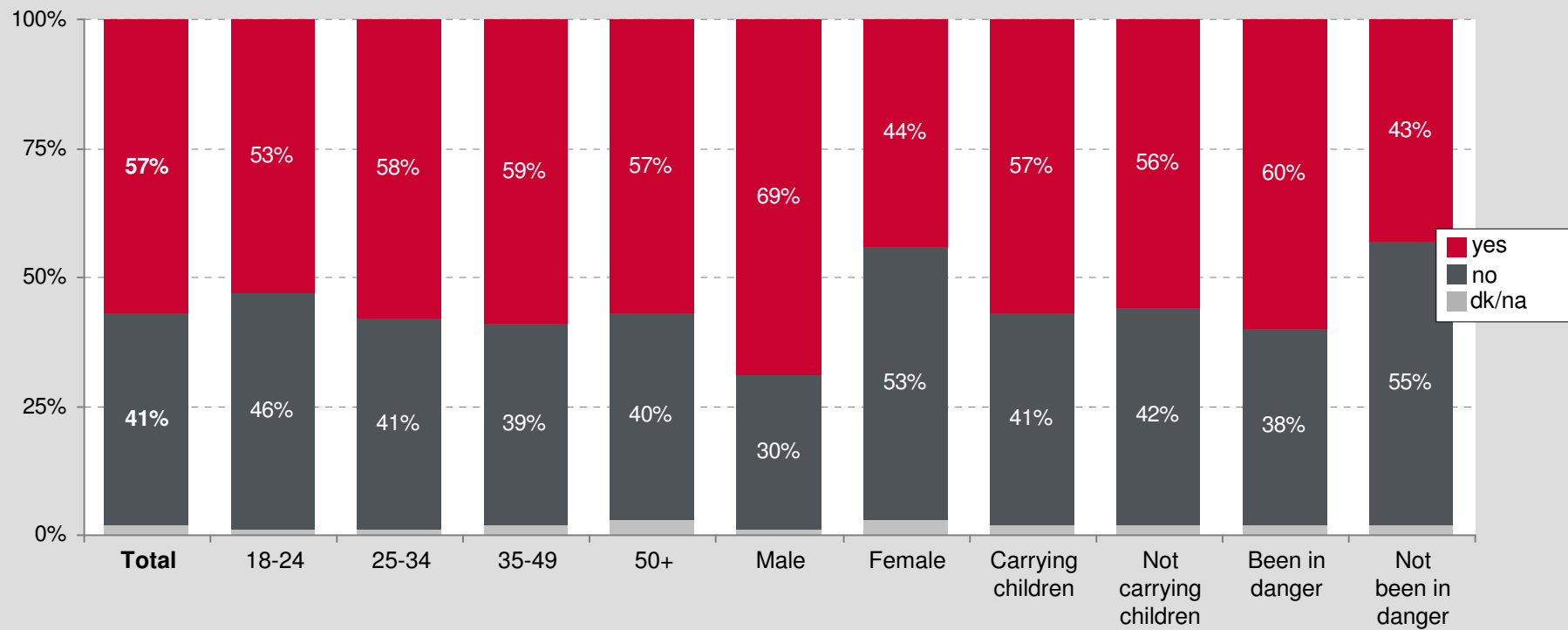


## 3.3 eSafety technologies

### 3.3.2 Advanced Emergency Braking

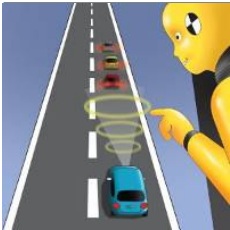


Have you ever heard of Advanced Emergency Braking?



## 3.3 eSafety technologies

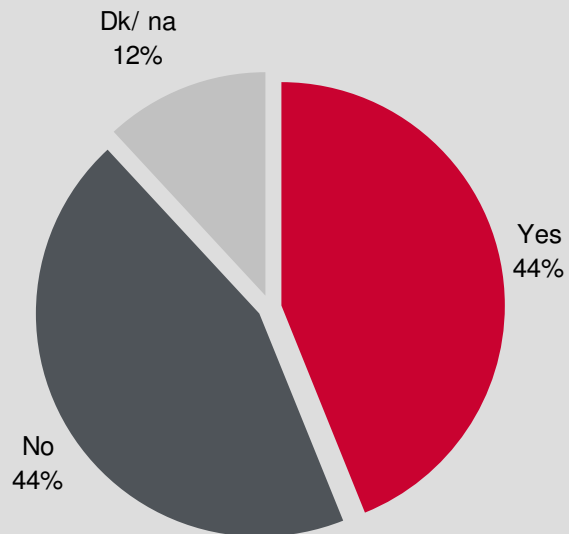
### 3.3.2 Advanced Emergency Braking



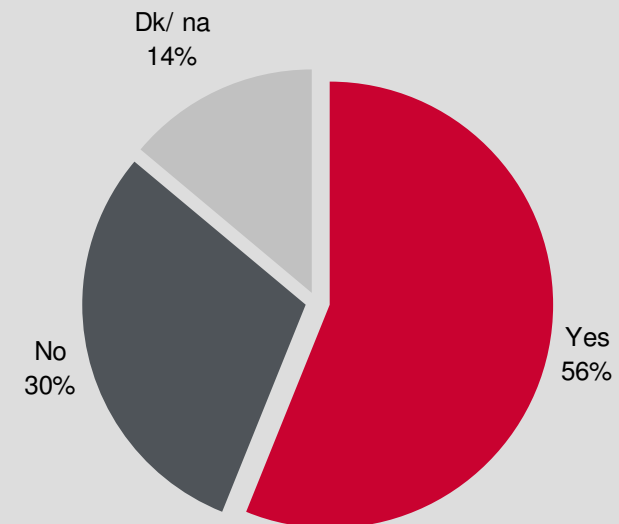
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2009



2011

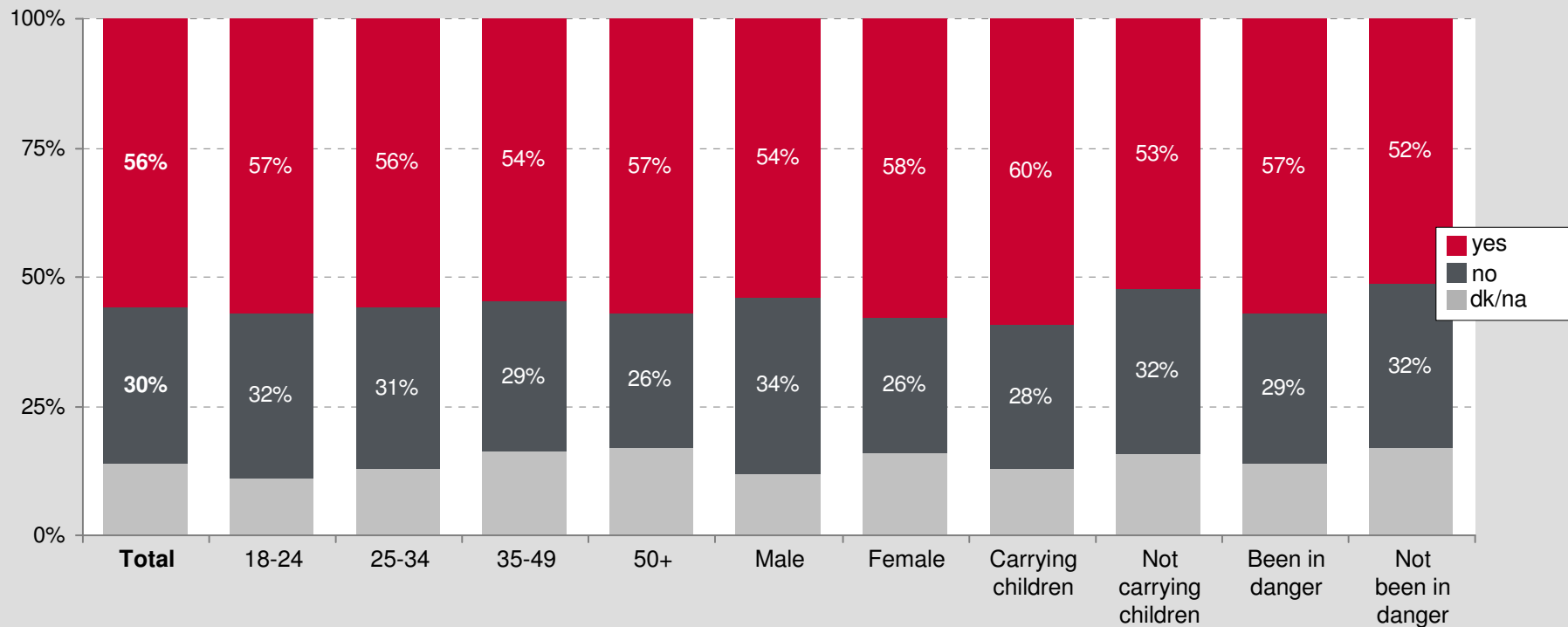


### 3.3 eSafety technologies

#### 3.3.2 Advanced Emergency Braking



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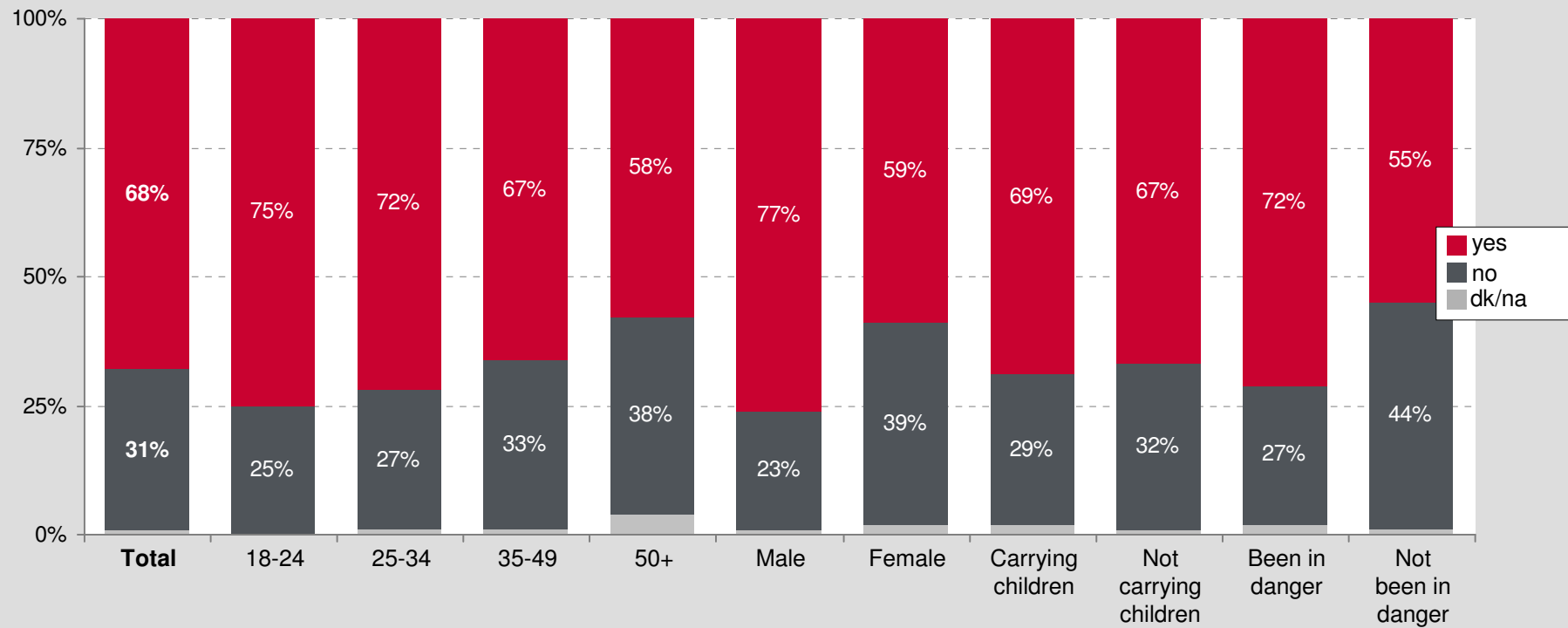


### 3.3 eSafety technologies

#### 3.3.2 Advanced Emergency Braking



Have you ever heard of Advanced Emergency Braking?

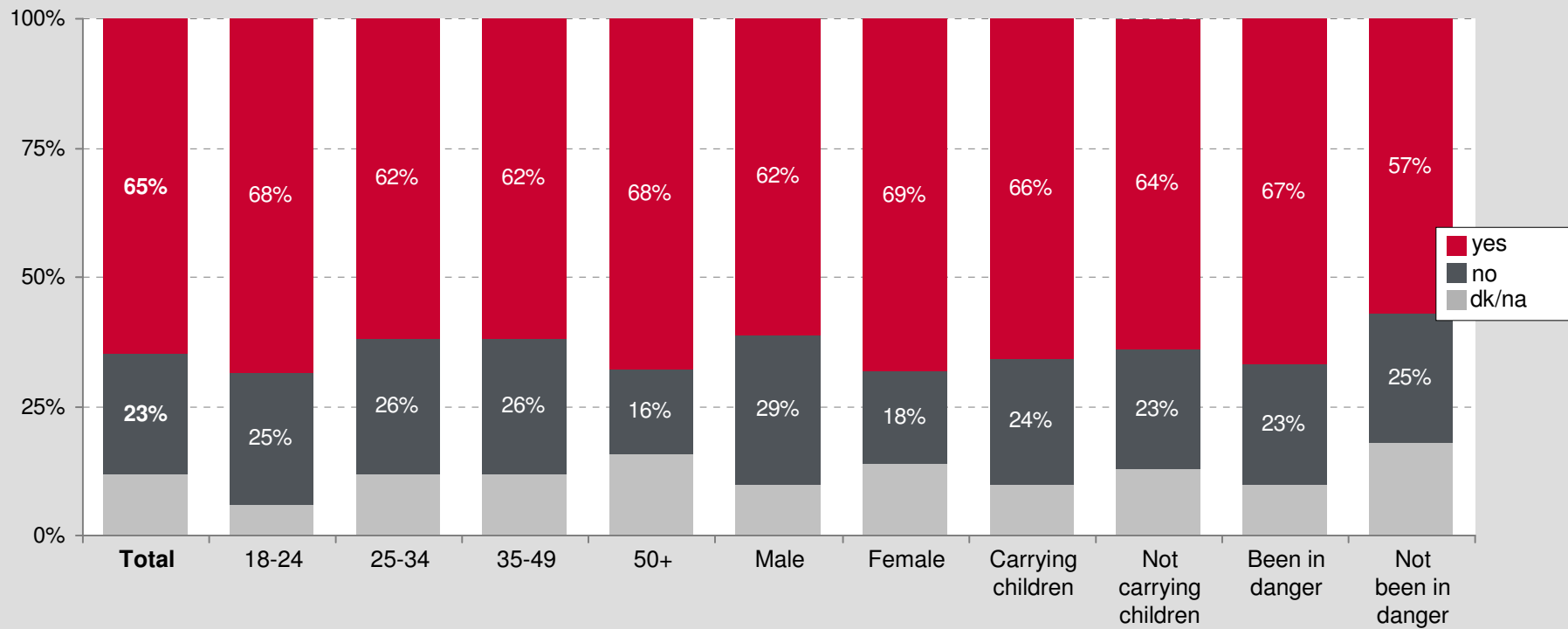


## 3.3 eSafety technologies

### 3.3.2 Advanced Emergency Braking



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    - 3.3.4 Speed Alert
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  - 3.4 Comparison of eSafety technologies

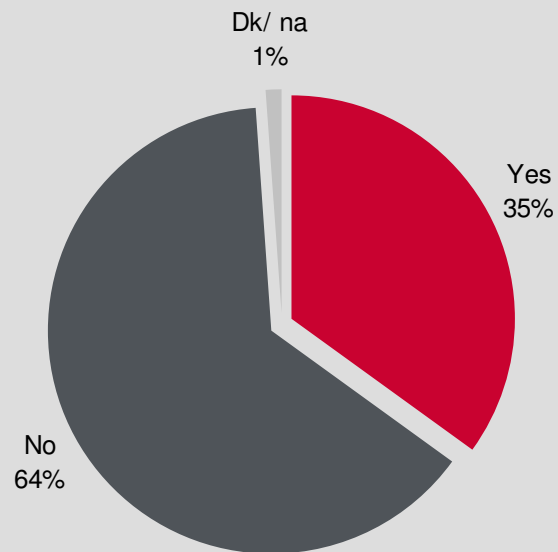
## 3.3 eSafety technologies

### 3.3.3 Blind Spot Monitoring

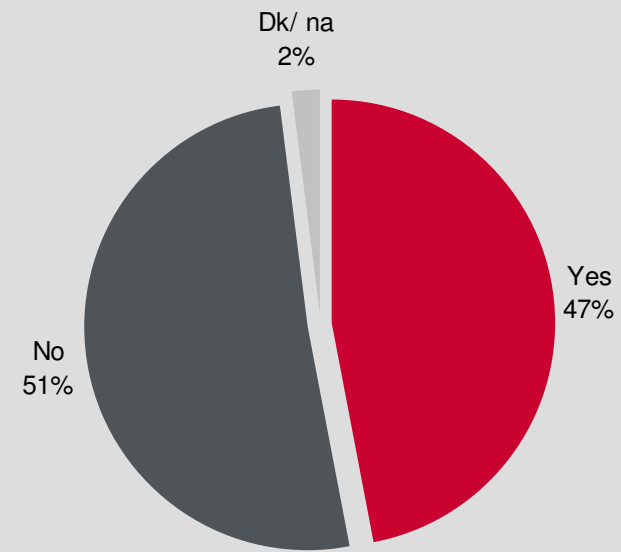


Have you ever heard of Blind Spot Monitoring?

2009

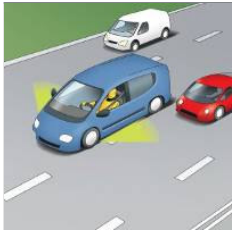


2011

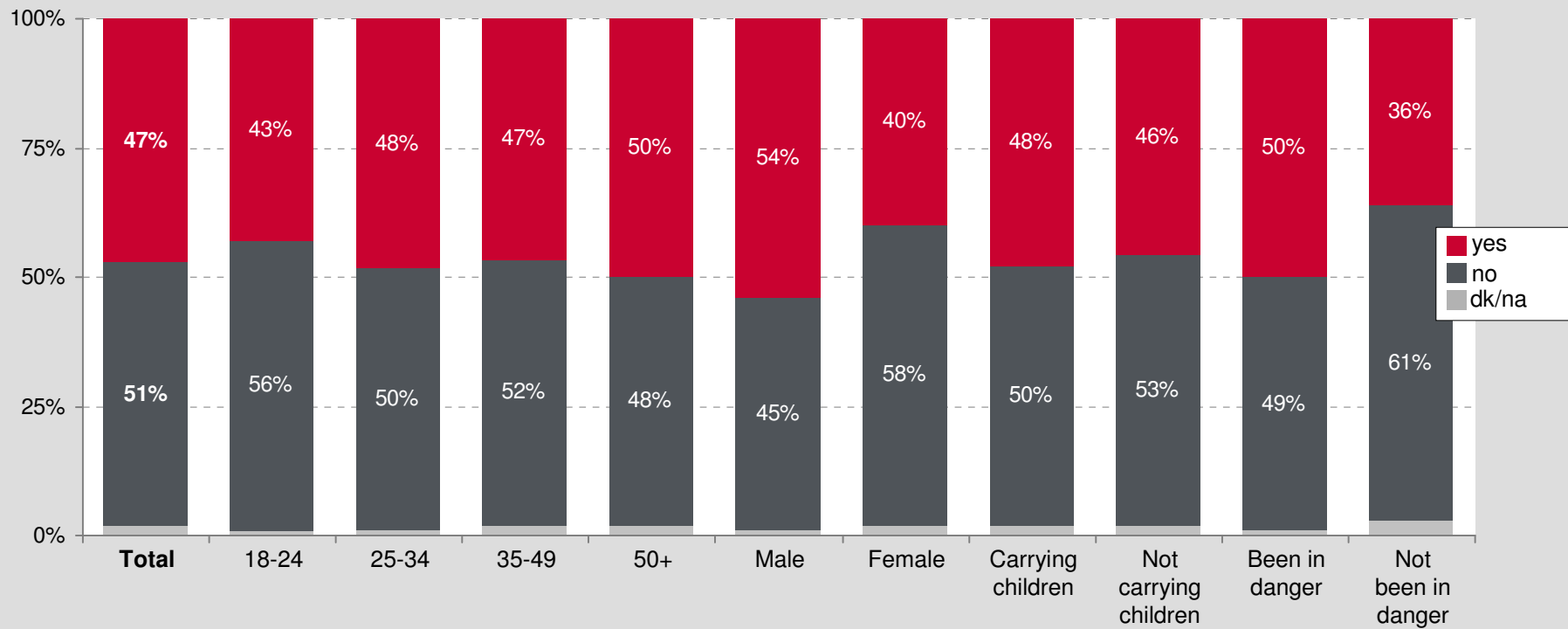


## 3.3 eSafety technologies

### 3.3.3 Blind Spot Monitoring



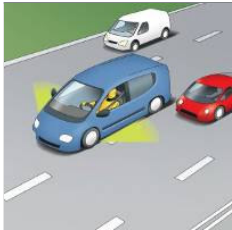
Have you ever heard of Blind Spot Monitoring?



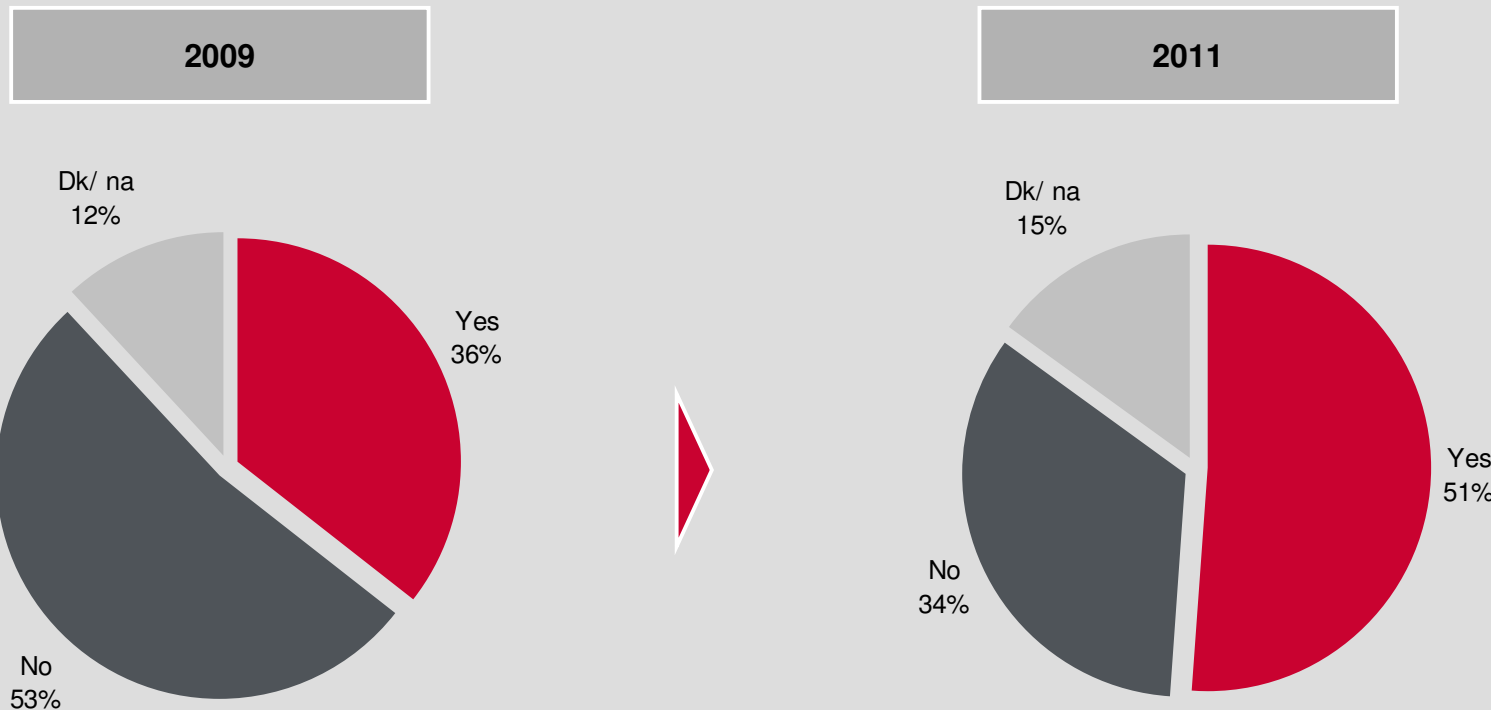


## 3.3 eSafety technologies

### 3.3.3 Blind Spot Monitoring

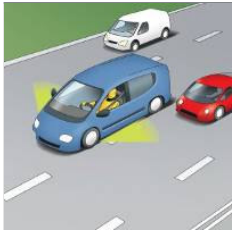


Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?

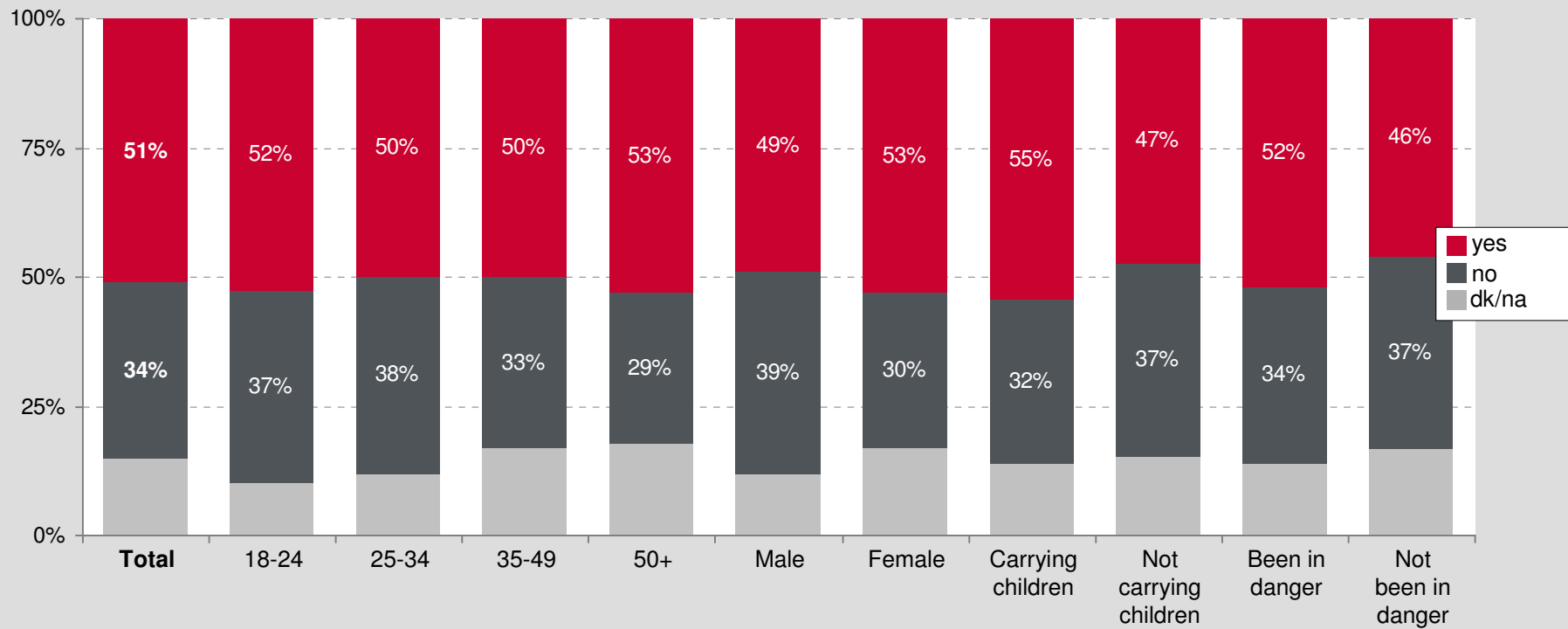


## 3.3 eSafety technologies

### 3.3.3 Blind Spot Monitoring

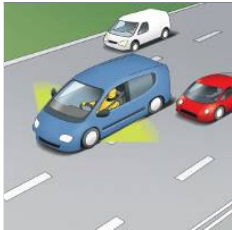


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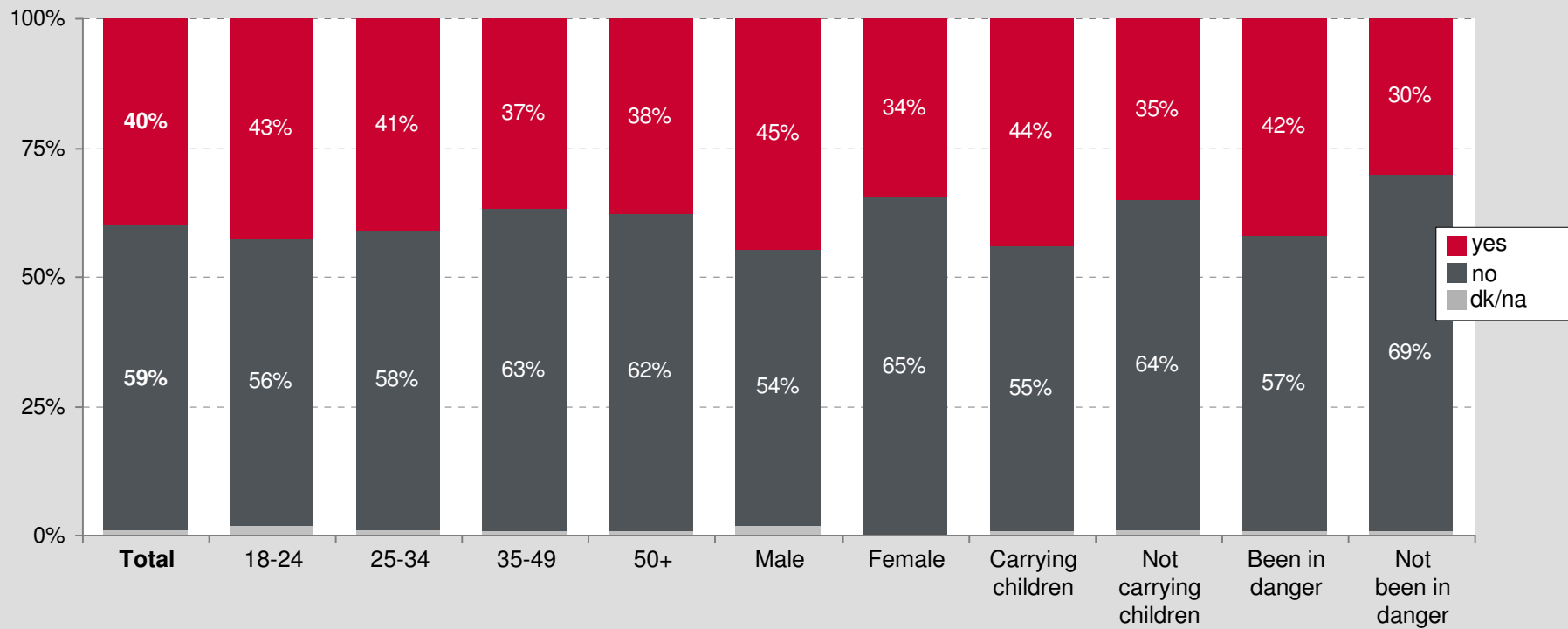


## 3.3 eSafety technologies

### 3.3.3 Blind Spot Monitoring

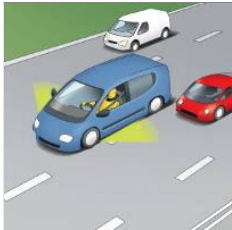


Have you ever heard of Blind Spot Monitoring?

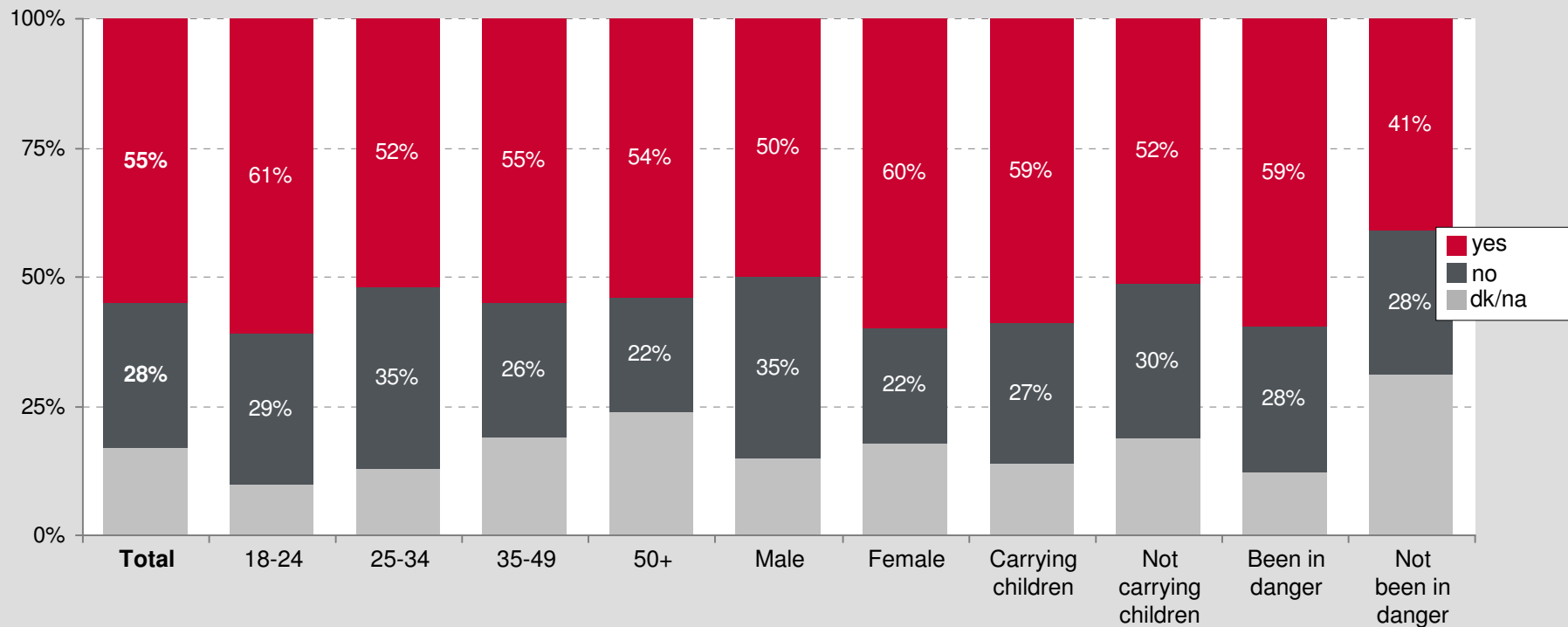


## 3.3 eSafety technologies

### 3.3.3 Blind Spot Monitoring



Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?





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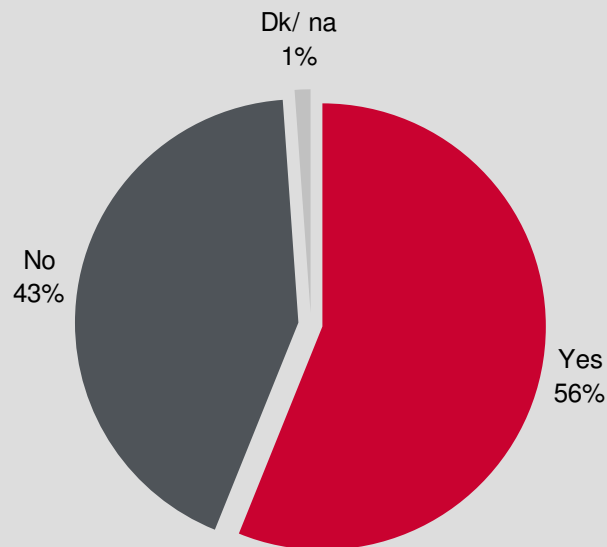
### 3.3 eSafety technologies

#### 3.3.4 Speed Alert

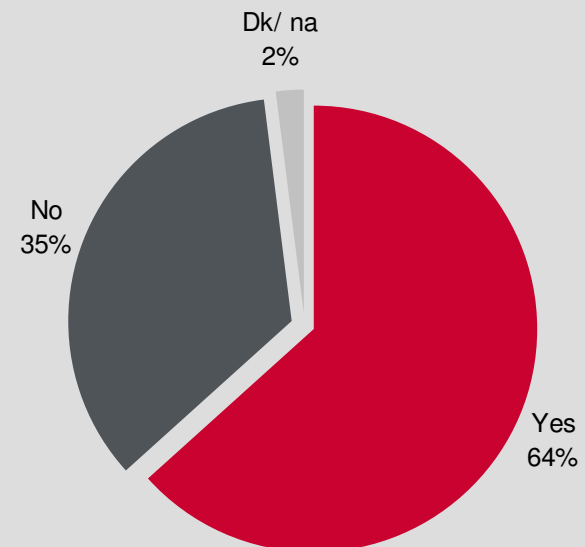


Have you ever heard of Speed Alert?

2009



2011

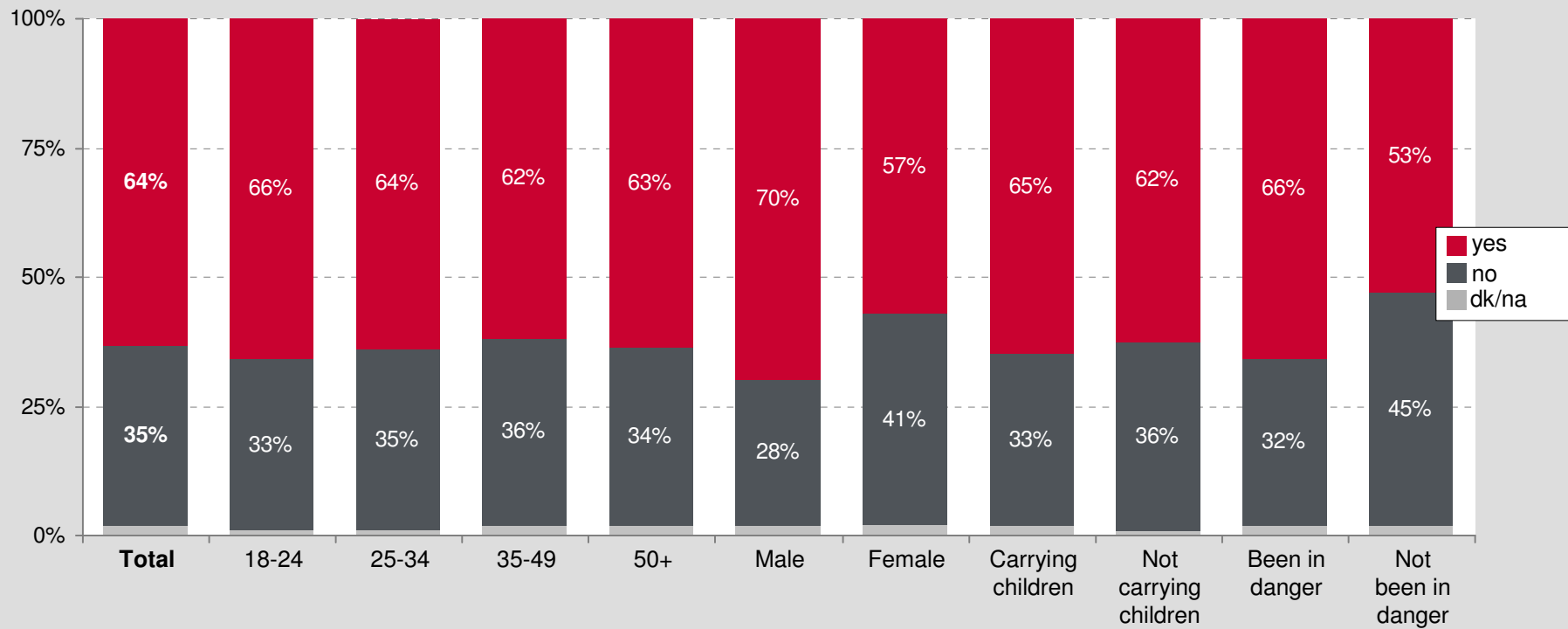


## 3.3 eSafety technologies

### 3.3.4 Speed Alert



Have you ever heard of Speed Alert?



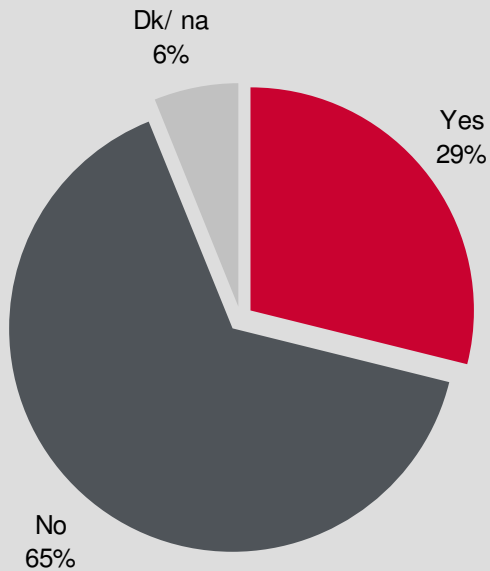
## 3.3 eSafety technologies

### 3.3.4 Speed Alert

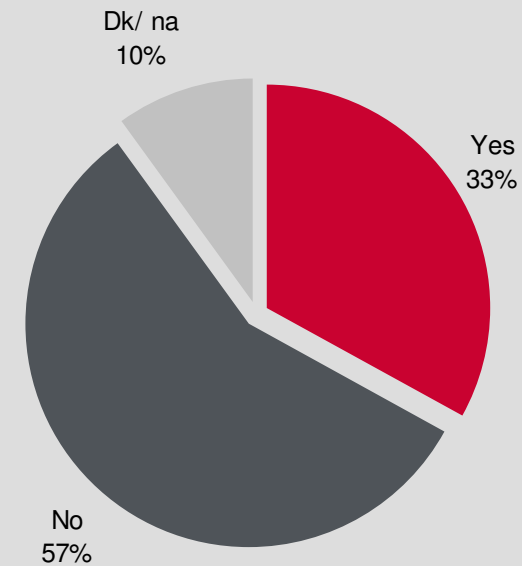


Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?

2009



2011



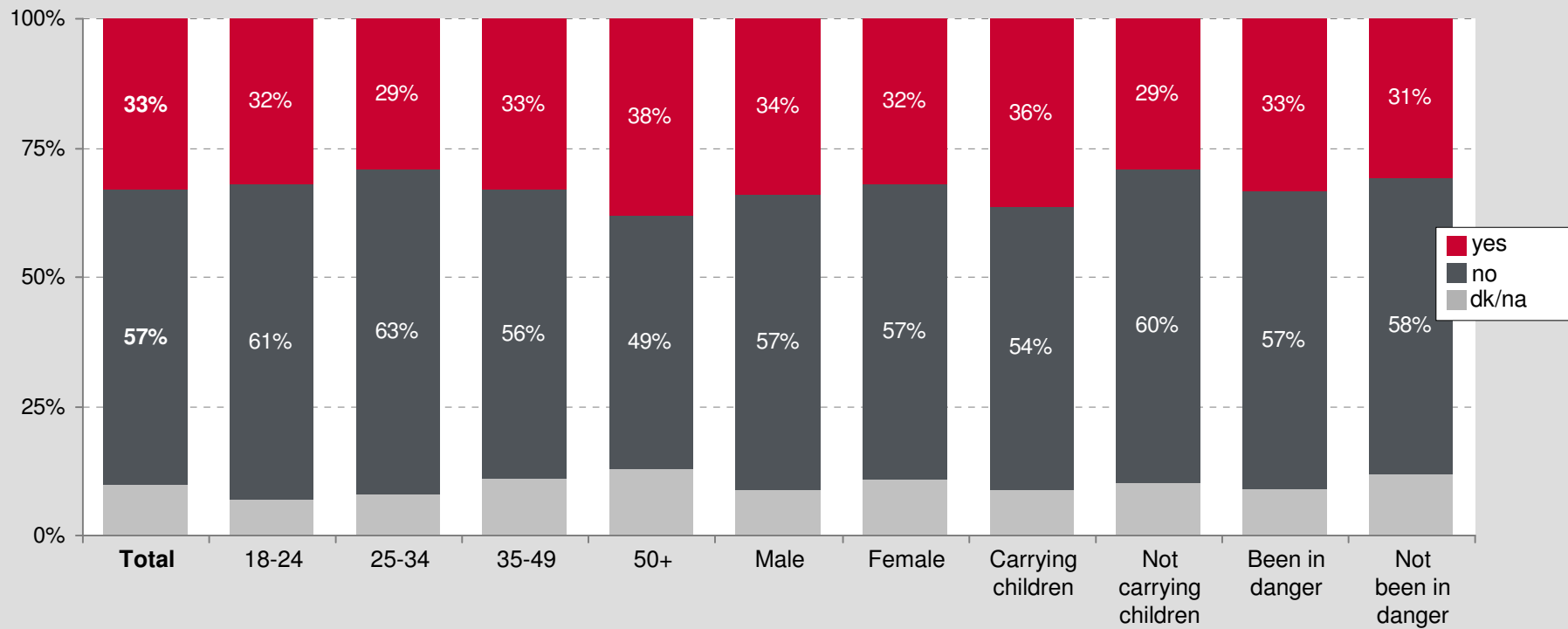


## 3.3 eSafety technologies

### 3.3.4 Speed Alert



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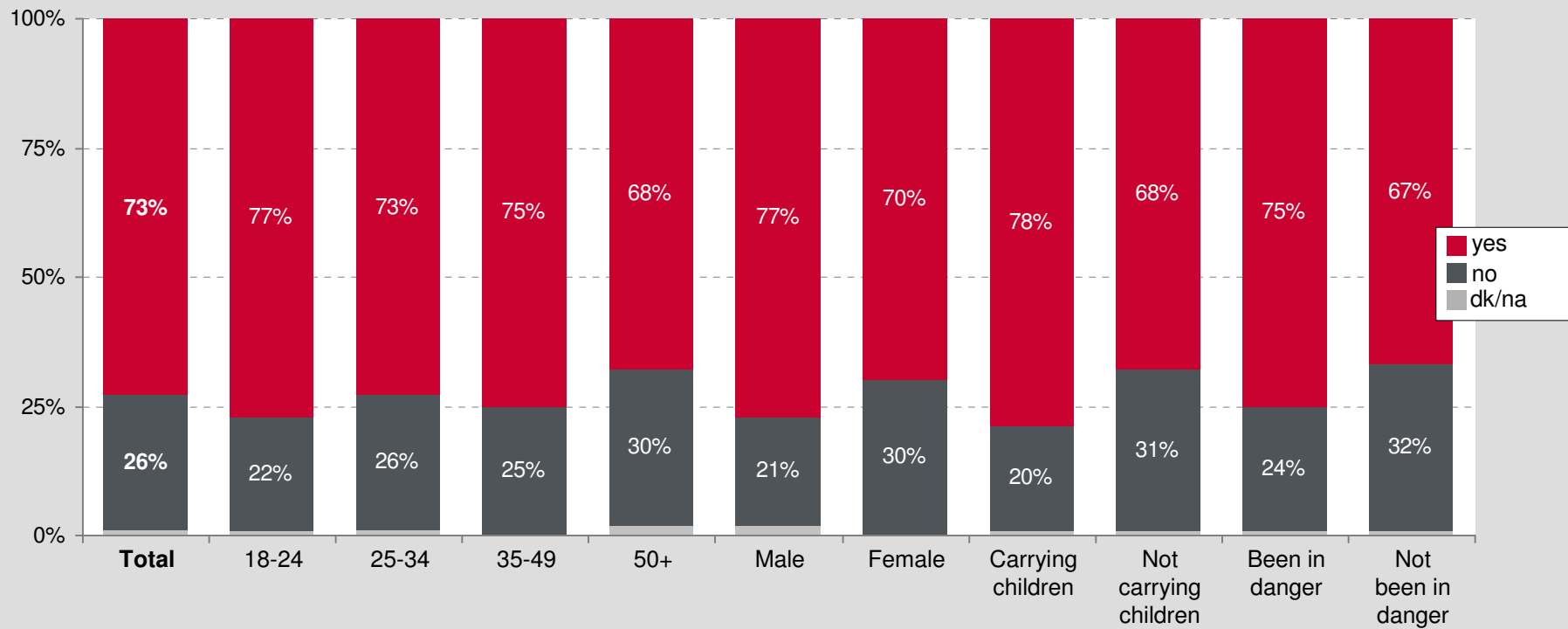


## 3.3 eSafety technologies

### 3.3.4 Speed Alert



Have you ever heard of Speed Alert?

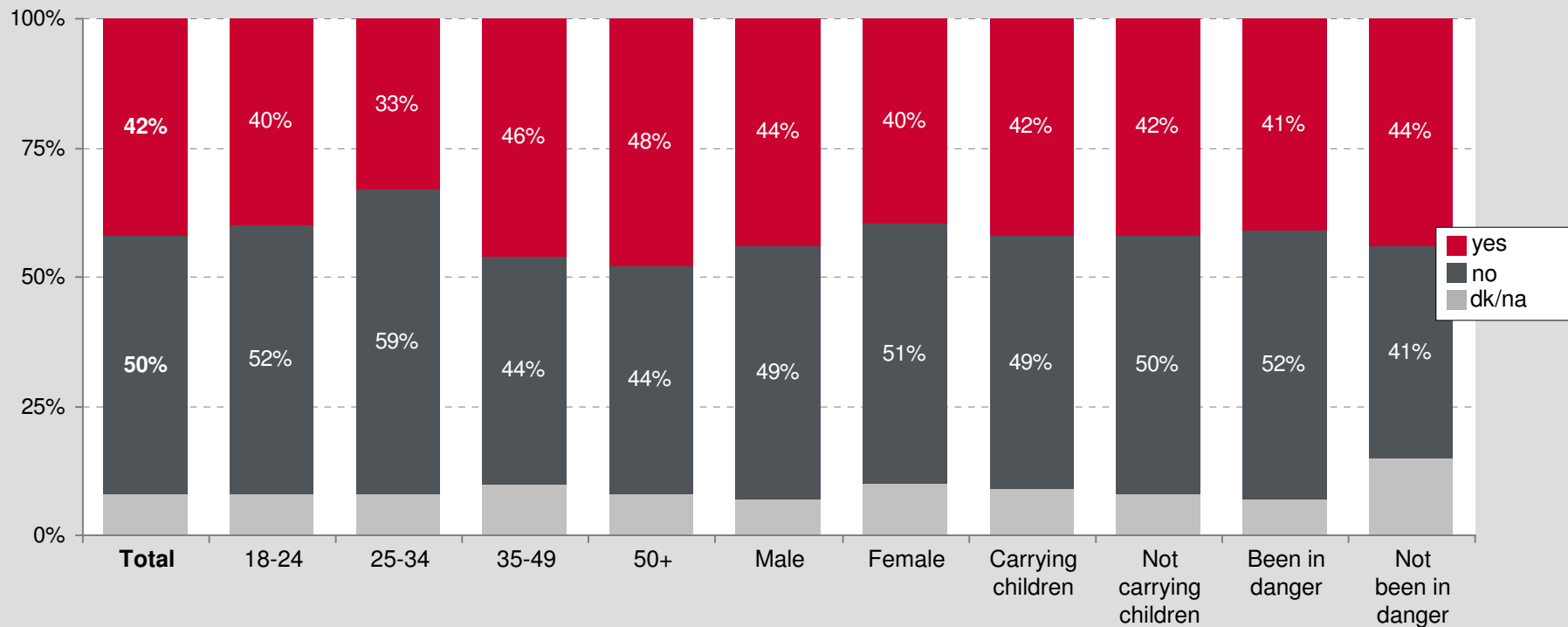


## 3.3 eSafety technologies

### 3.3.4 Speed Alert



Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?



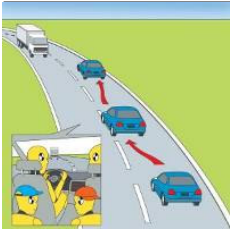


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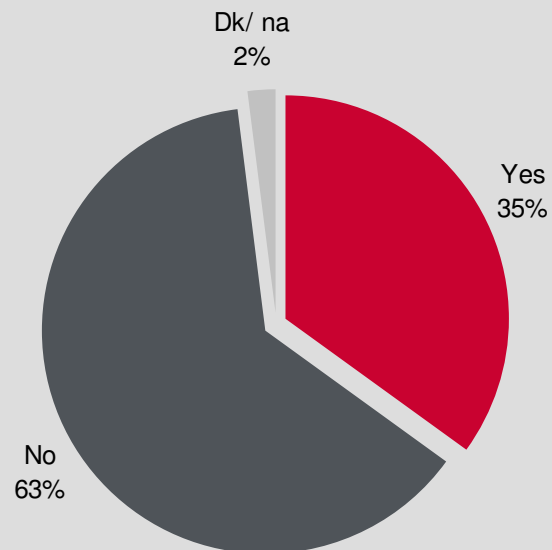
### 3.3 eSafety technologies

#### 3.3.5 Lane Support System

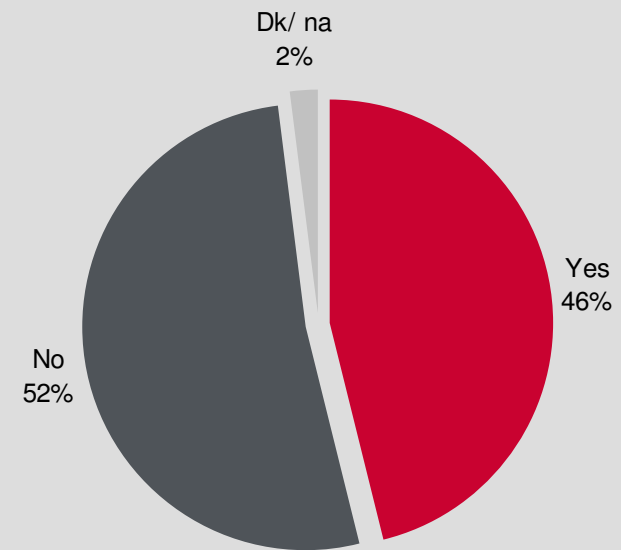


Have you ever heard of Lane Support Systems?

2009

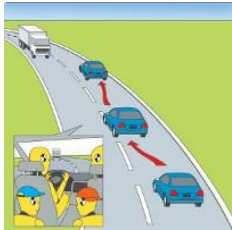


2011

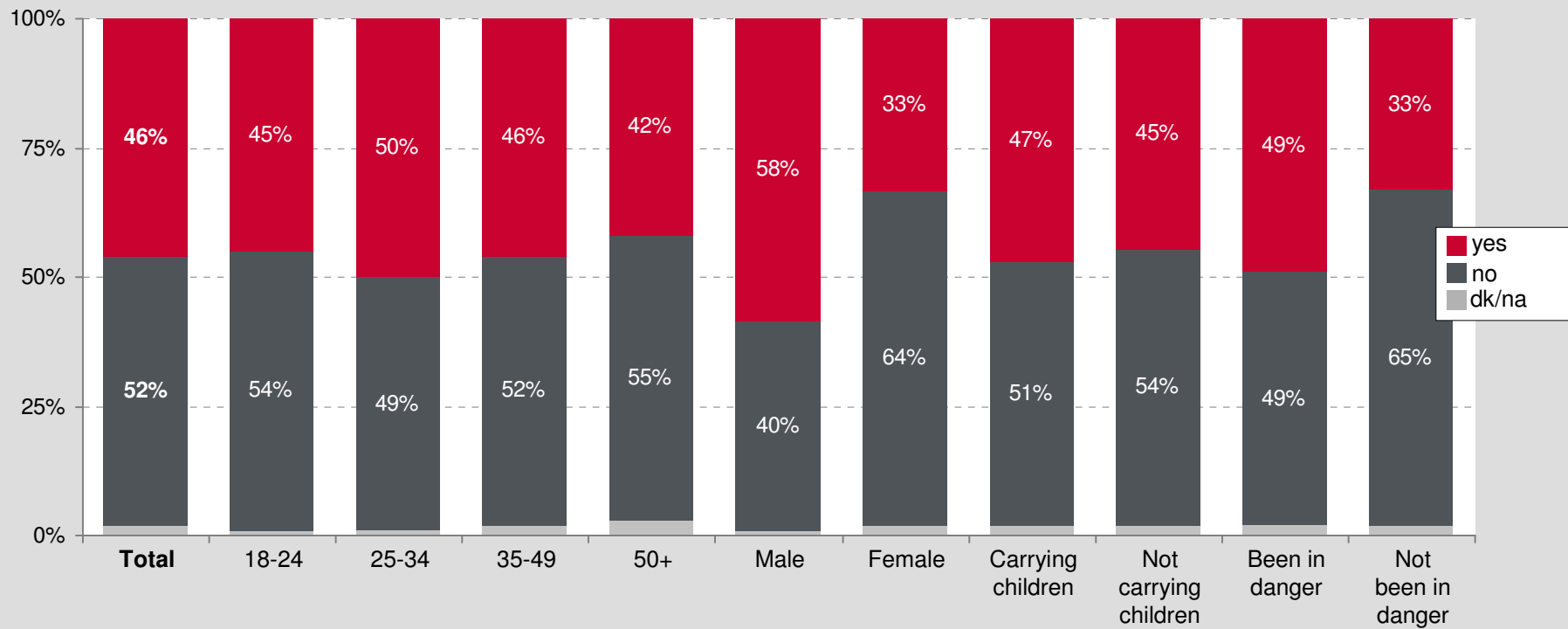


## 3.3 eSafety technologies

### 3.3.5 Lane Support System

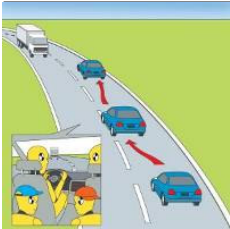


Have you ever heard of Lane Support Systems?



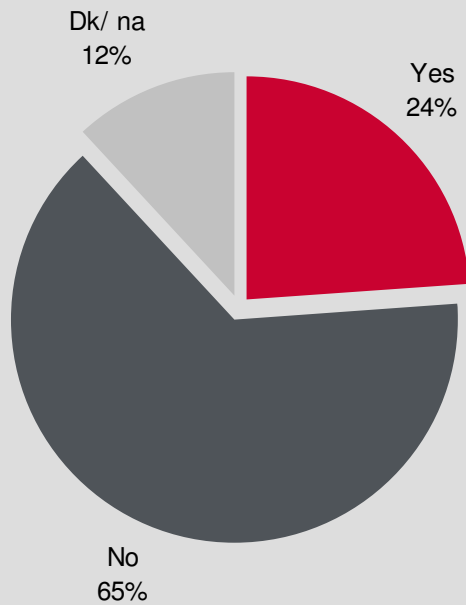
## 3.3 eSafety technologies

### 3.3.5 Lane Support System

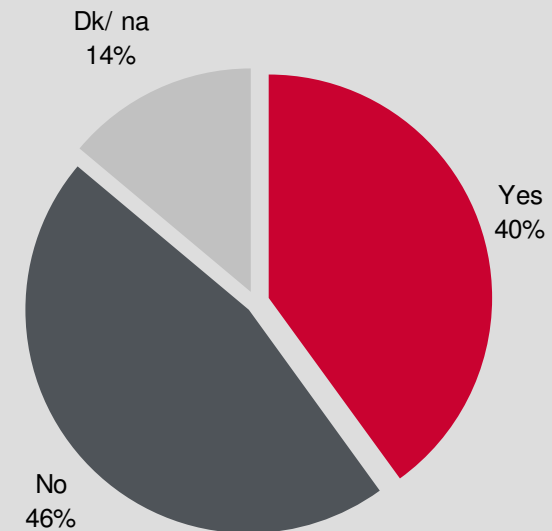


Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?

2009

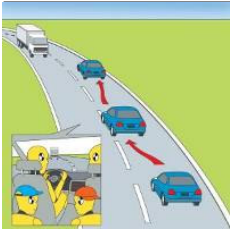


2011

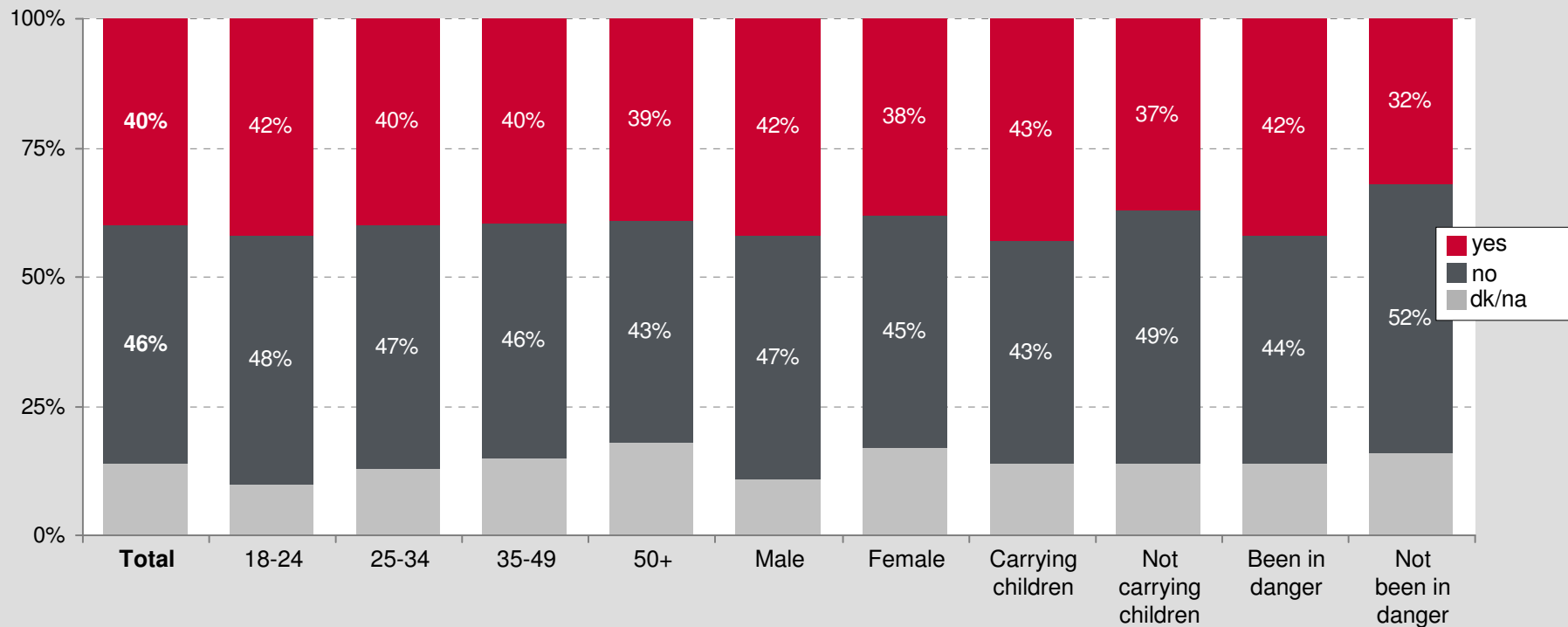


## 3.3 eSafety technologies

### 3.3.5 Lane Support System



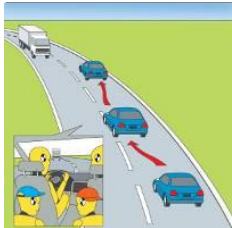
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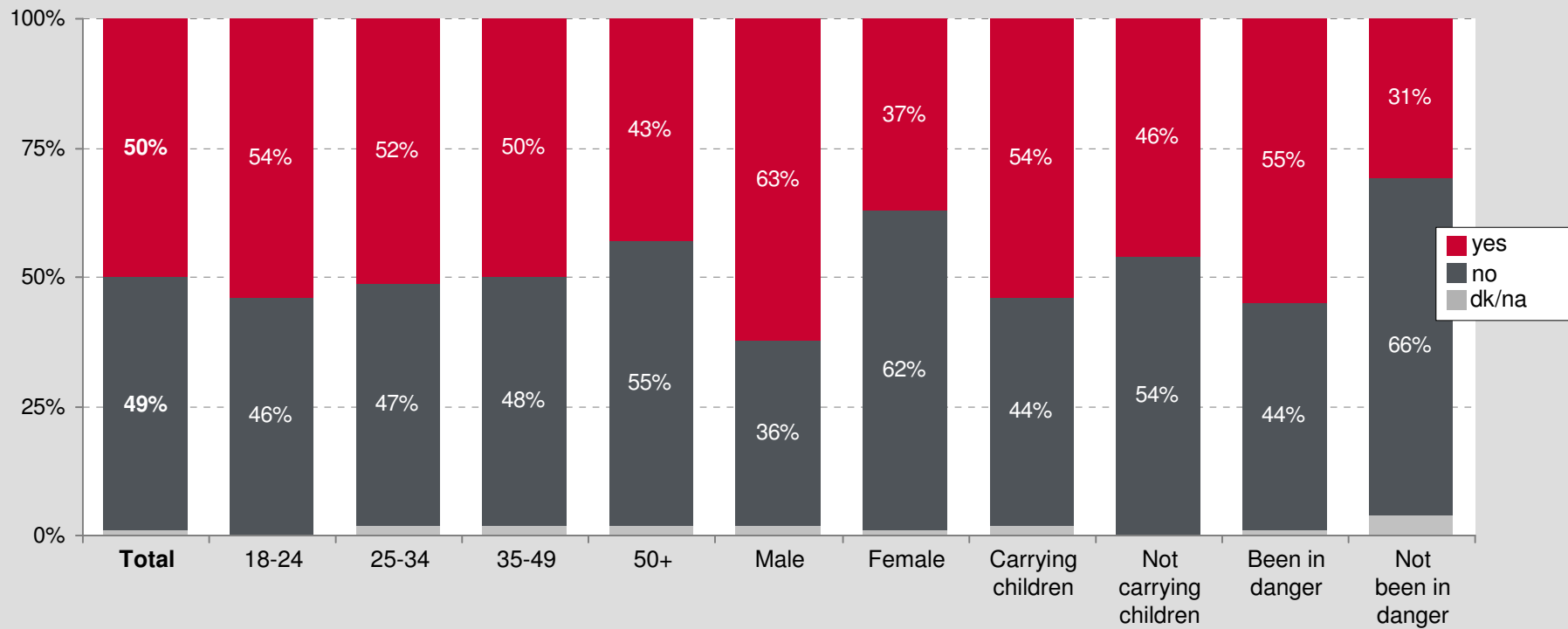


### 3.3 eSafety technologies

#### 3.3.5 Lane Support System

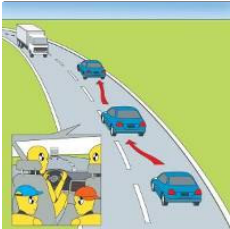


Have you ever heard of Lane Support Systems?

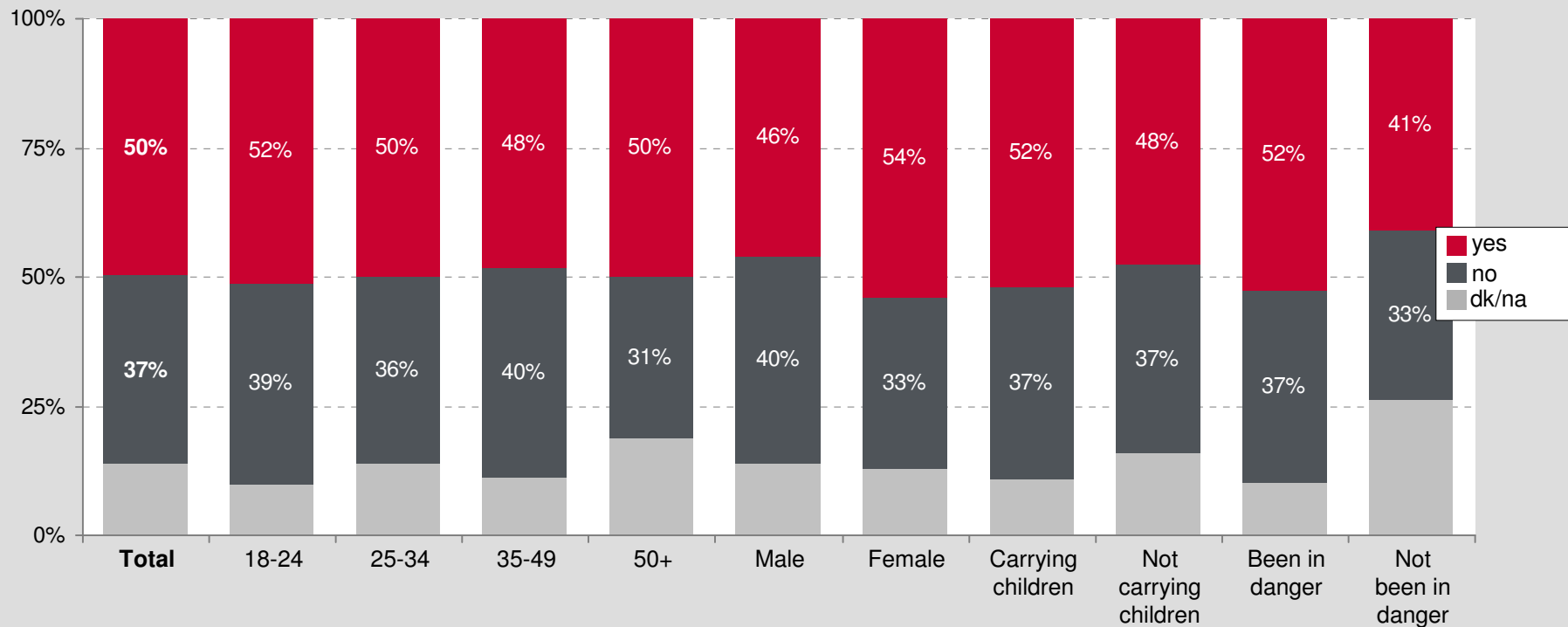


### 3.3 eSafety technologies

#### 3.3.5 Lane Support System



Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?





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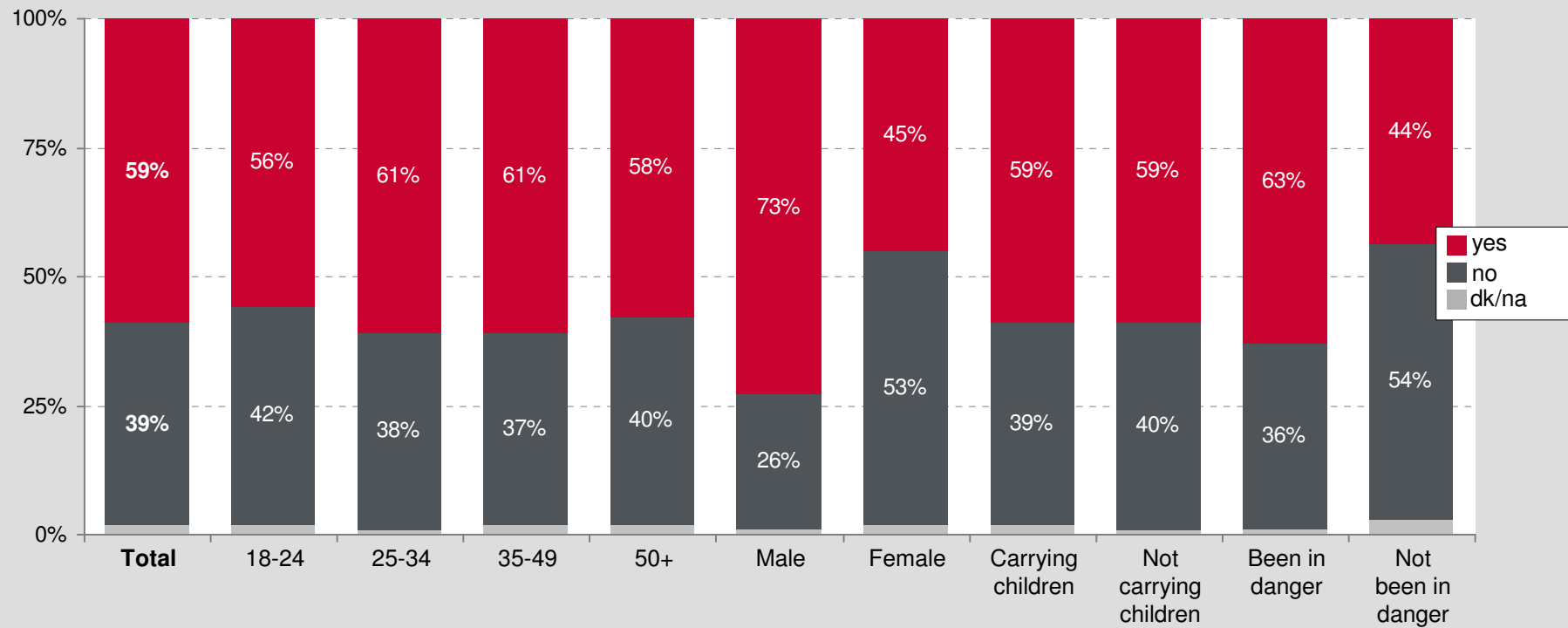
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## 3.3 eSafety technologies

### 3.3.6 Adaptive Headlights



Have you ever heard of Adaptive Headlights Systems?

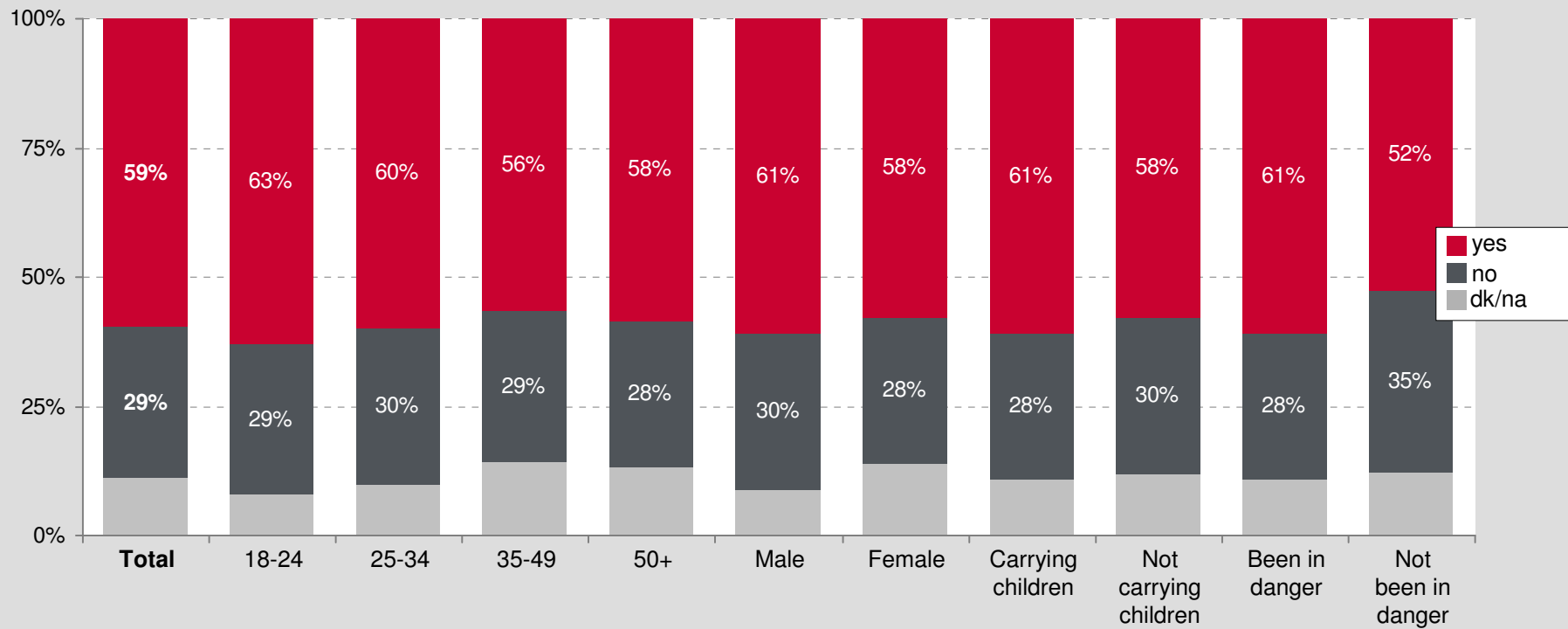


## 3.3 eSafety technologies

### 3.3.6 Adaptive Headlights



Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?

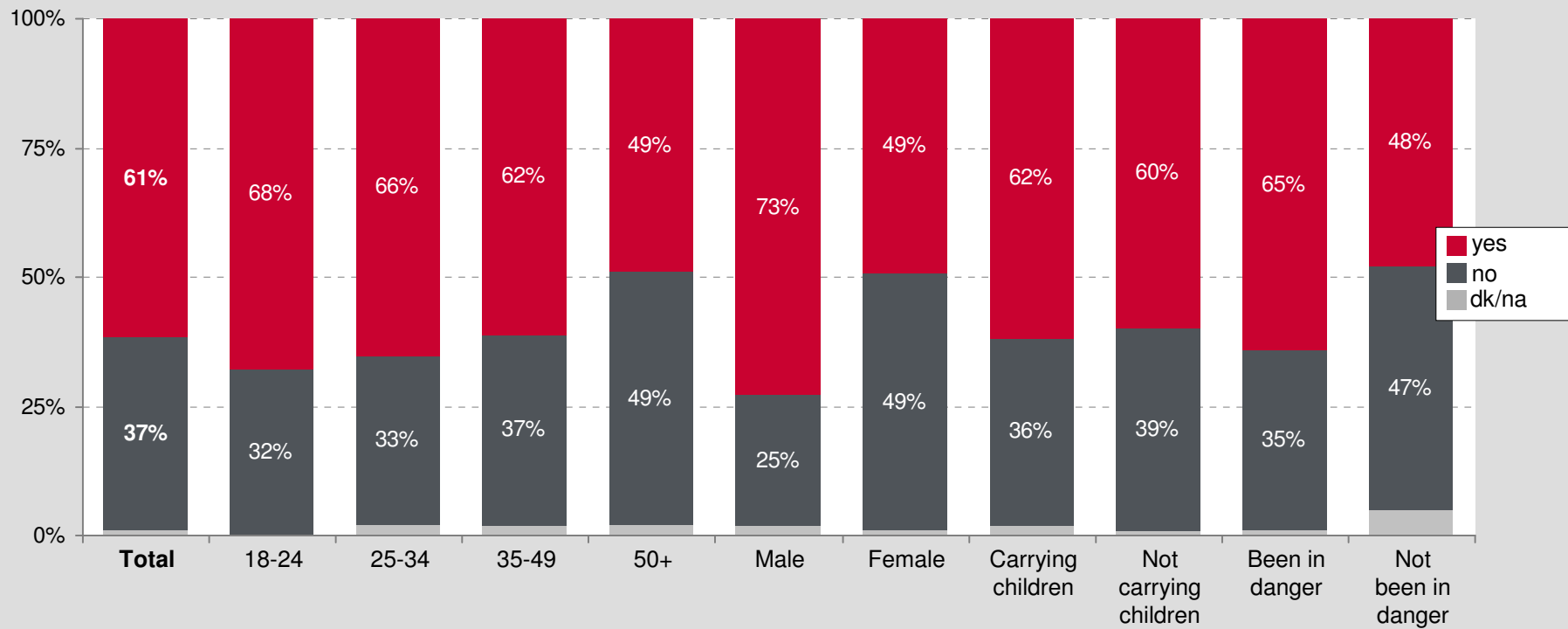


### 3.3 eSafety technologies

#### 3.3.6 Adaptive Headlights



Have you ever heard of Adaptive Headlights Systems?

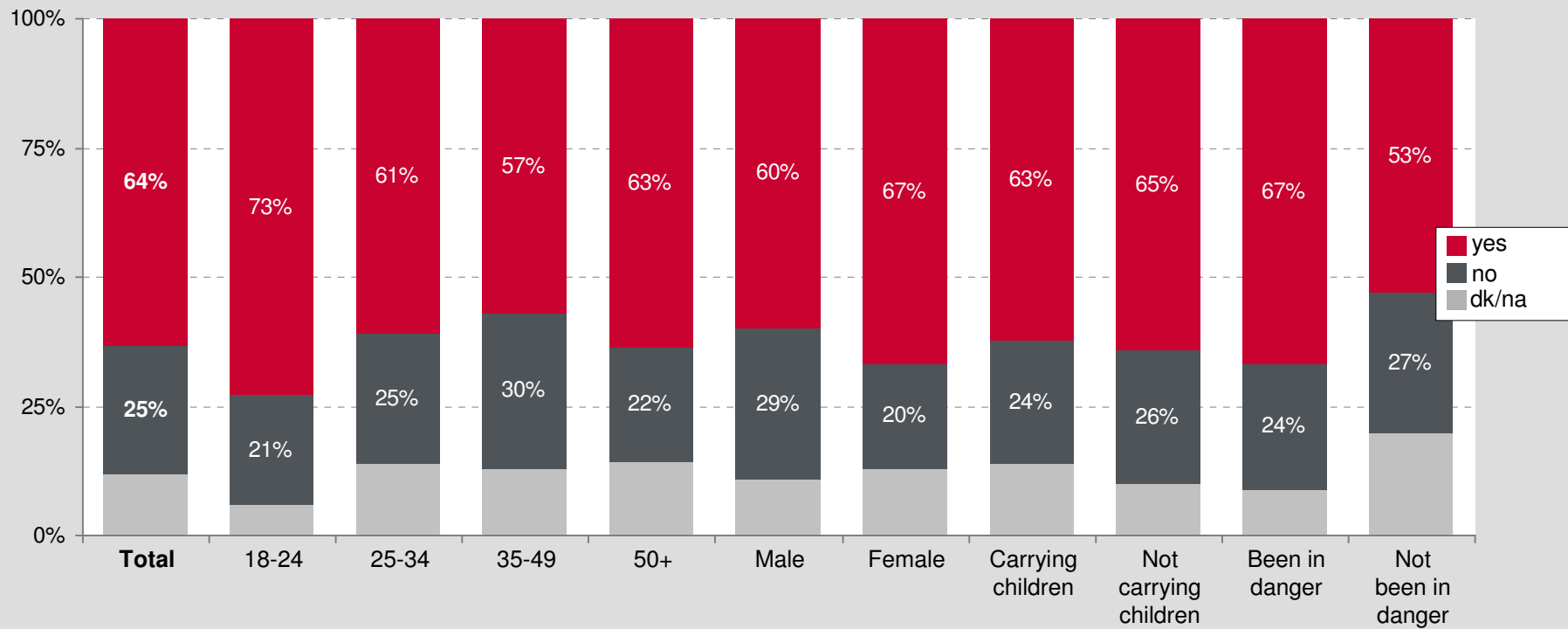


## 3.3 eSafety technologies

### 3.3.6 Adaptive Headlights



Just imagine you buy a new car and you want to have your car fitted with this safety system but it is not standard. Basically, would you be willing to pay extra for this system?





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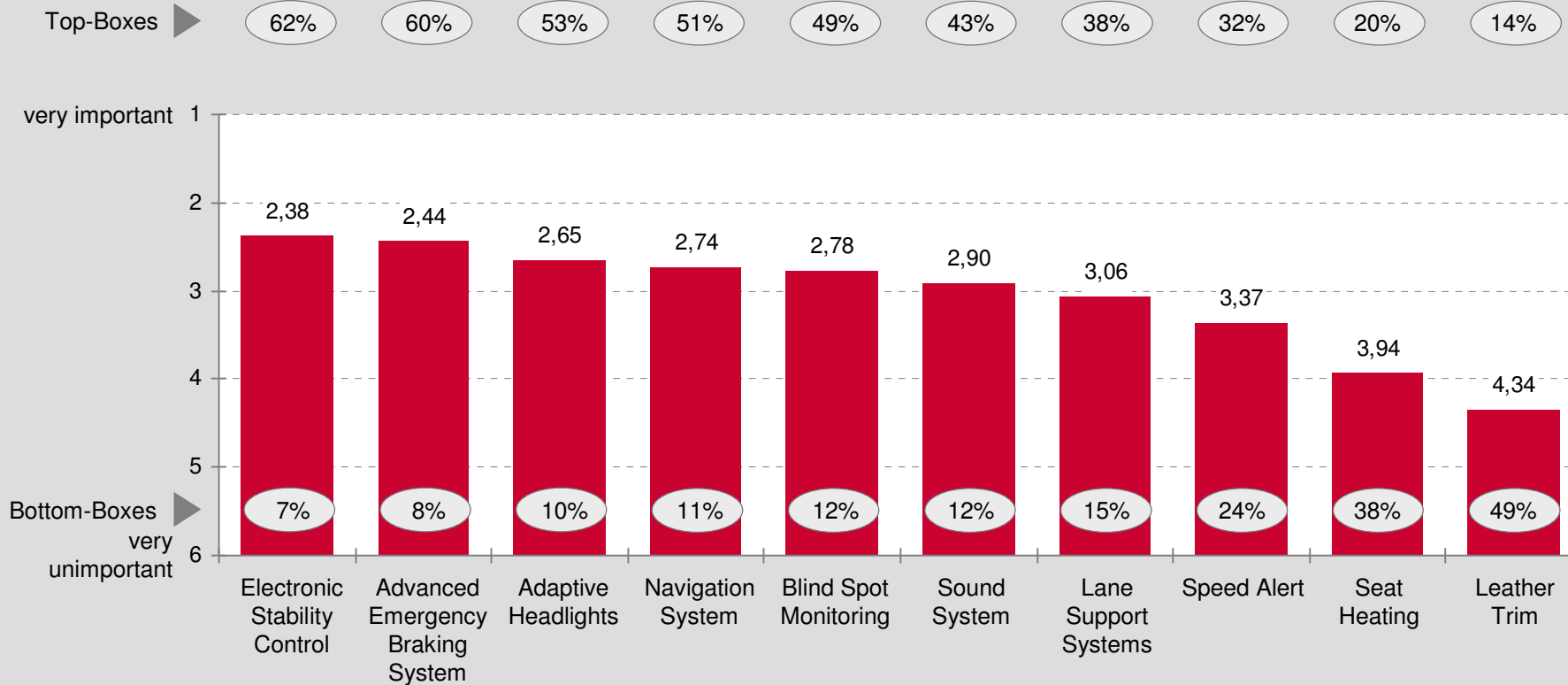


### 3. Results

#### 3.4 Comparison of eSafety technologies



How important are the following features to you personally?



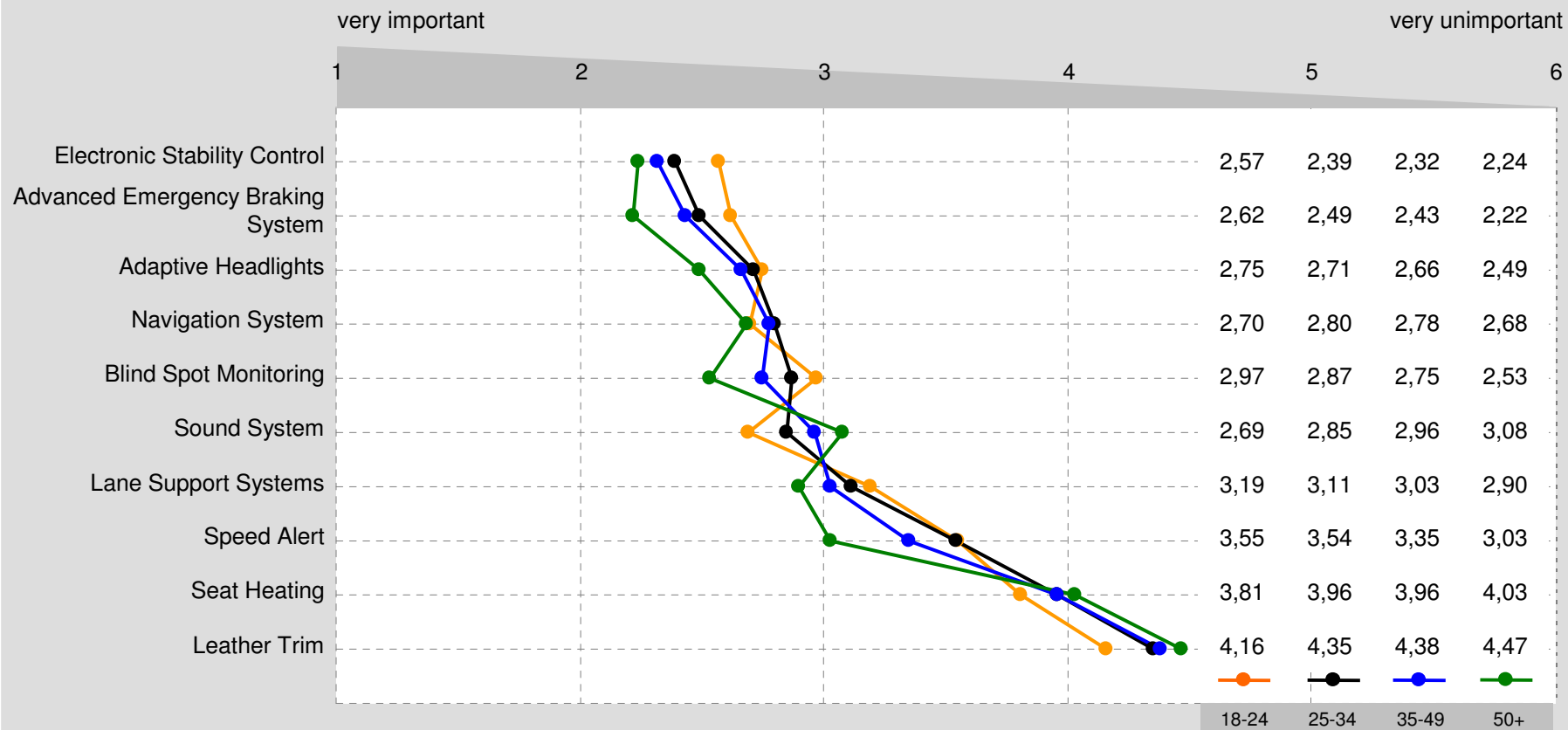


### 3. Results

#### 3.4 Comparison of eSafety technologies



How important are the following features to you personally?



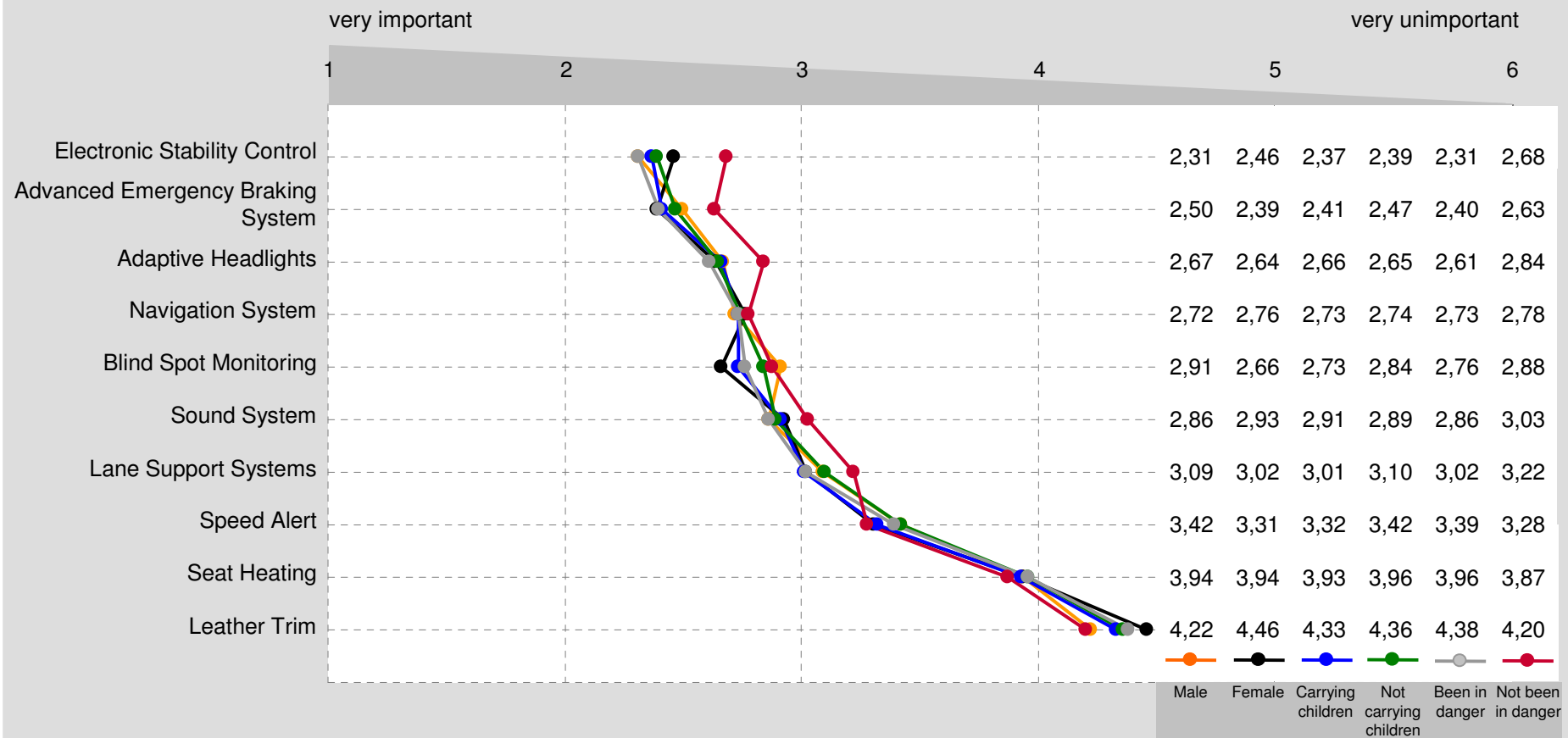


### 3. Results

#### 3.4 Comparison of eSafety technologies



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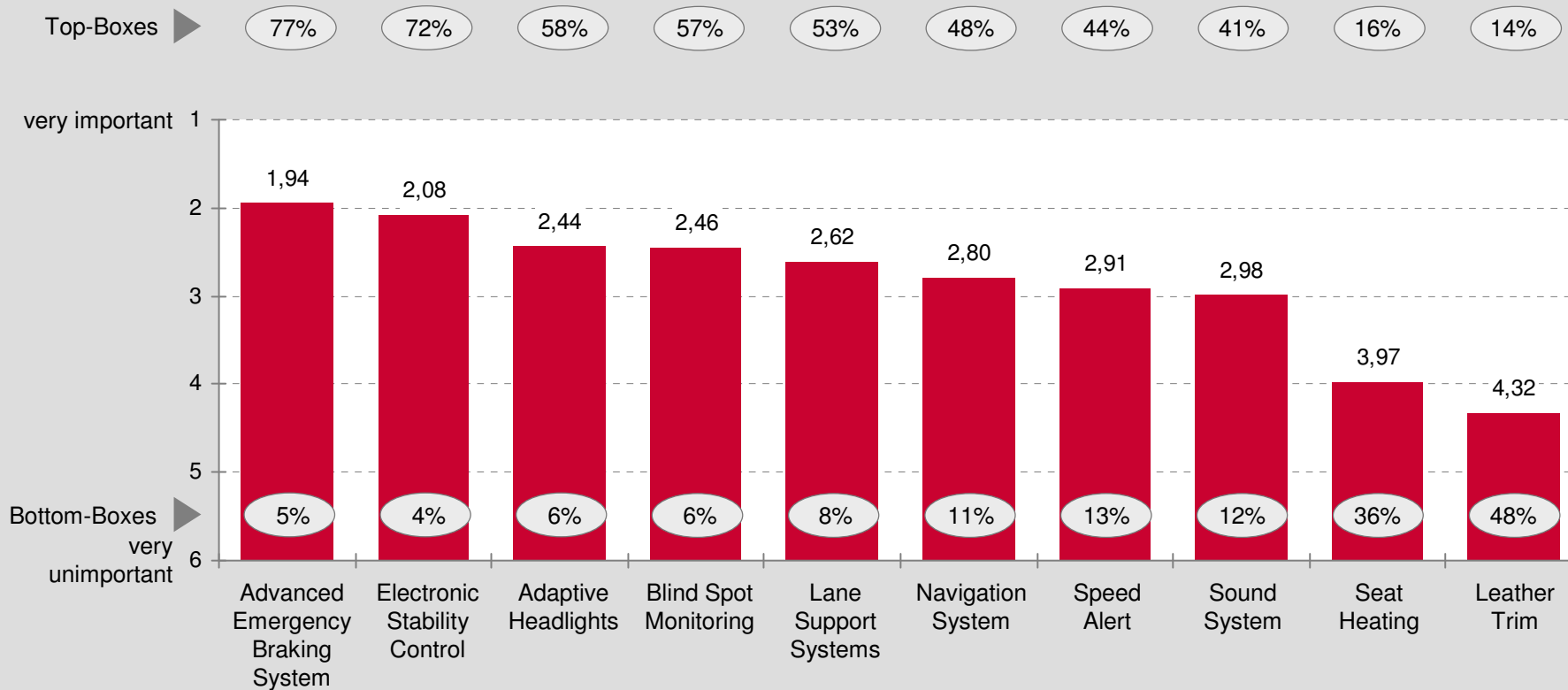


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#### 3.4 Comparison of eSafety technologies



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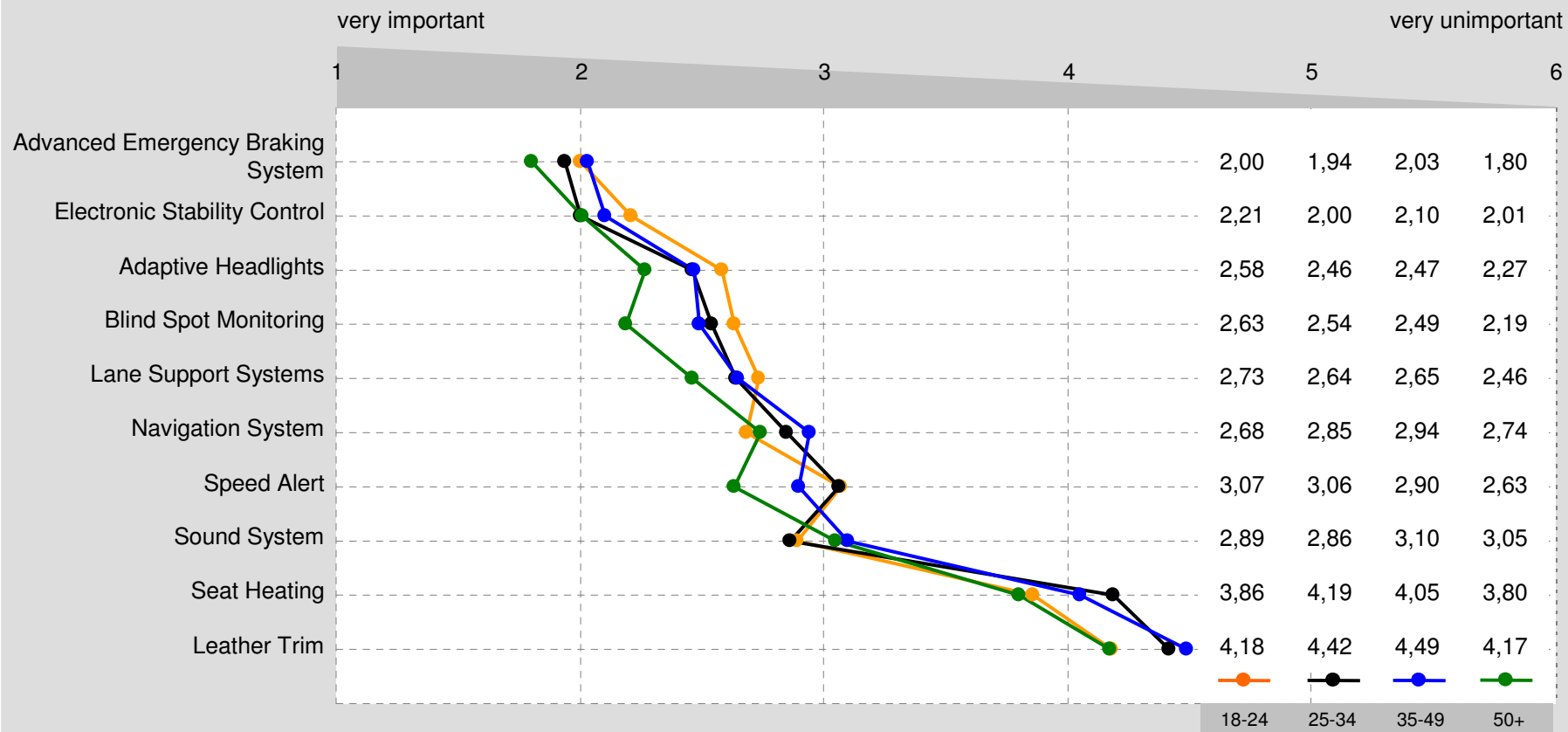


### 3. Results

#### 3.4 Comparison of eSafety technologies



How important are the following features to you personally?





### 3. Results

#### 3.4 Comparison of eSafety technologies



How important are the following features to you personally?

