



**Safety
Challenge**

Car Users' Acceptance of eSafety Technologies
eSafety Challenge Study 2011
Key Findings

CAR USERS' ACCEPTANCE OF eSAFETY TECHNOLOGY

In 2009 a study on car users' acceptance for certain eSafety technologies was carried out in five European countries (France, Germany, Italy, Poland, UK) to support the eSafety Challenge main event in Vallelunga, Italy.

Two years later another consumer survey was created with comparable objectives but on a larger scale. The study looked mainly into personal ratings of car selection criteria and awareness of certain eSafety technologies among car buyers.

It is clear that eSafety technologies have the potential to dramatically reduce the number of road accidents and deaths, yet car buyers' take-up of these life saving technologies has been slower than desired.

So, just how importantly do car buyers rate safety in their make and model selection criteria? Survey results would suggest that the vast majority of drivers questioned had at least found themselves in a dangerous traffic situation:

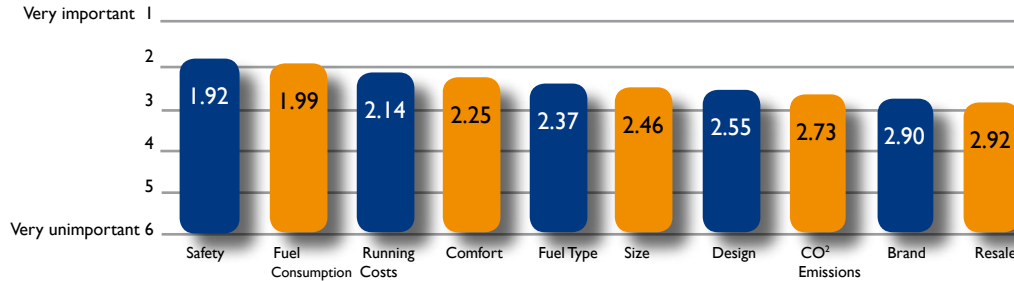
NO: 20%



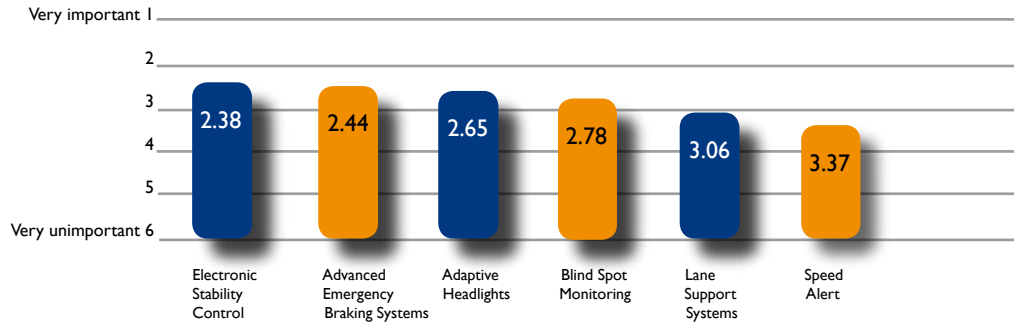
YES: 80%

GENERAL IMPORTANCE OF SAFETY

When it comes to purchasing a new vehicle safety is the number one purchasing criterion, followed closely by fuel consumption and running costs. The two latter indicate that car buyers are also relatively cost-conscious when it comes to buying a new car. It is worth noting the relatively lowly position of vehicle brand.

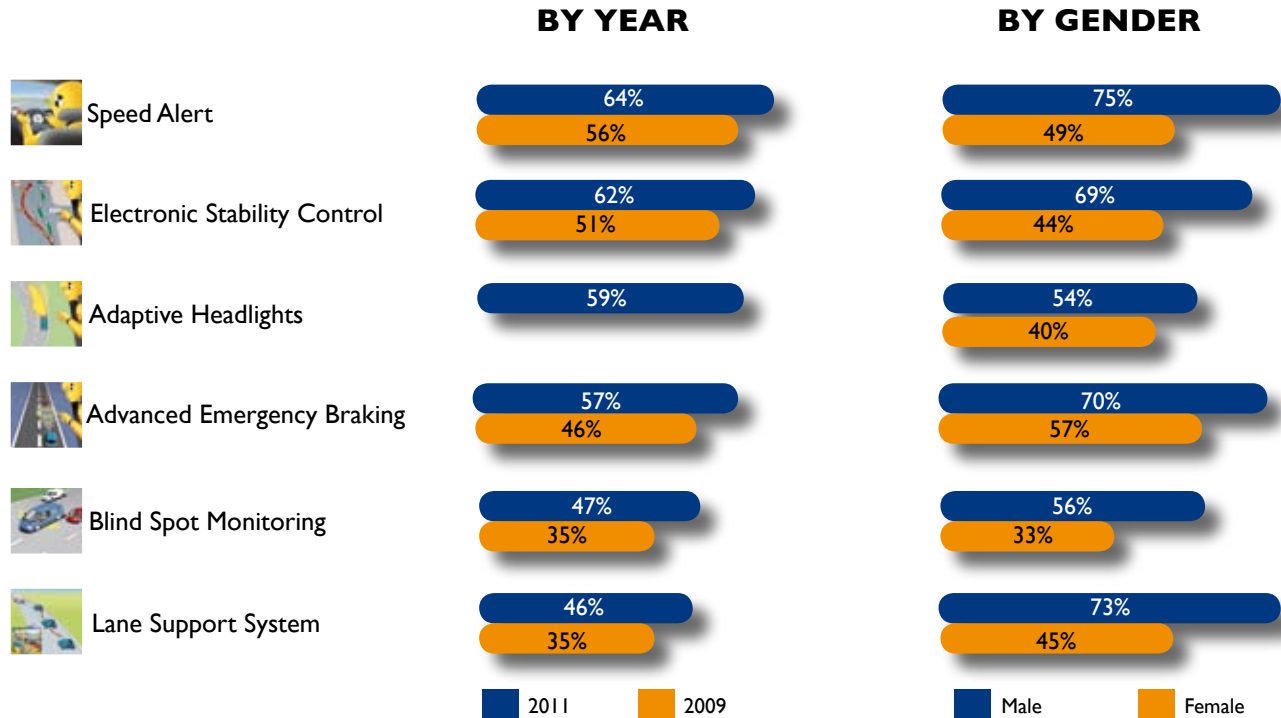


Safety systems are generally rated as important equipment on a vehicle. On a European level, eSafety systems with the highest importance are Electronic Stability Control, Advanced Emergency Braking Systems and Adaptive Headlights. Systems are equally important for men and women, while respondents who had been involved in a critical situation rate the importance of safety systems higher.



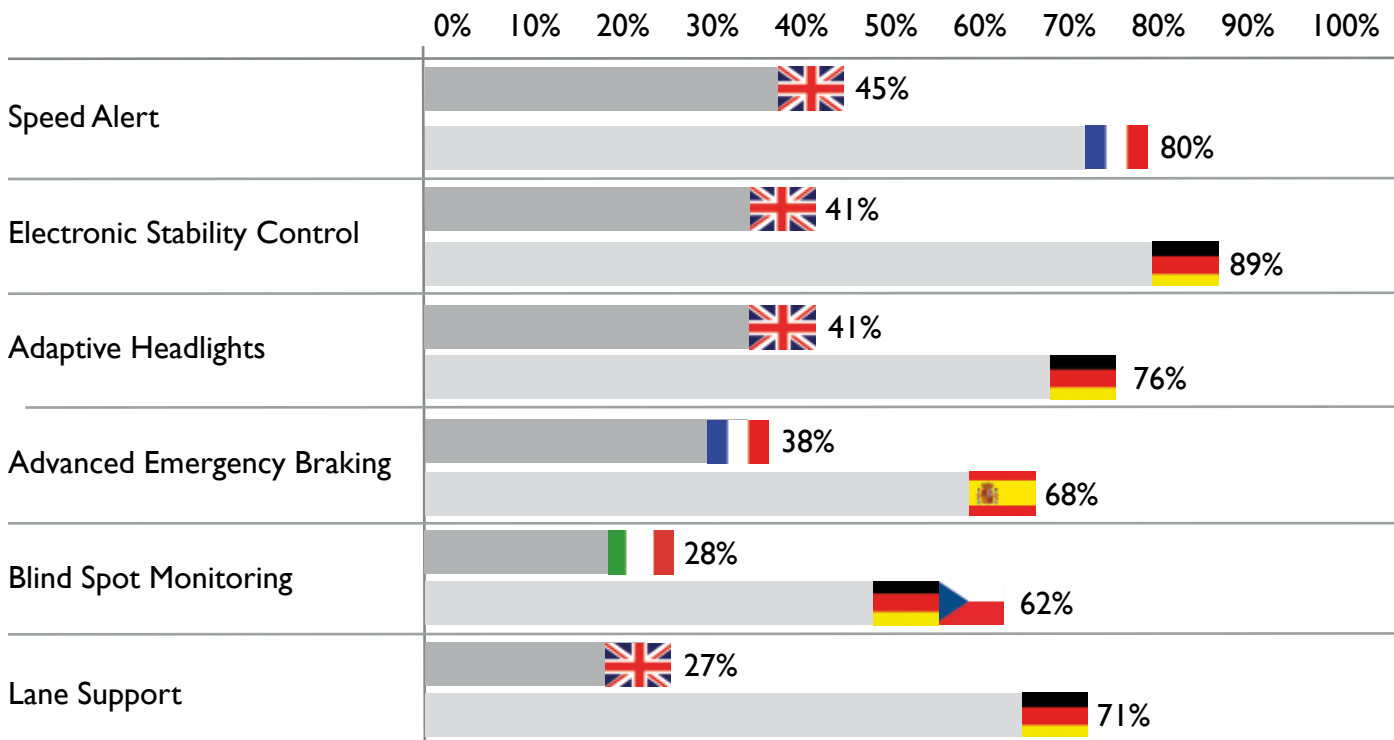
AWARENESS OF eSAFETY SYSTEMS

If we compare awareness levels of eSafety-related systems on a European level by year and by gender, we can see that since 2009 the awareness of eSafety systems has increased by nearly 10 per cent for all systems by 2011. Speed Alert, ESC and Advanced Emergency Braking Systems are the best-known systems.



GEOGRAPHICAL SPREAD OF eSAFETY AWARENESS LEVELS

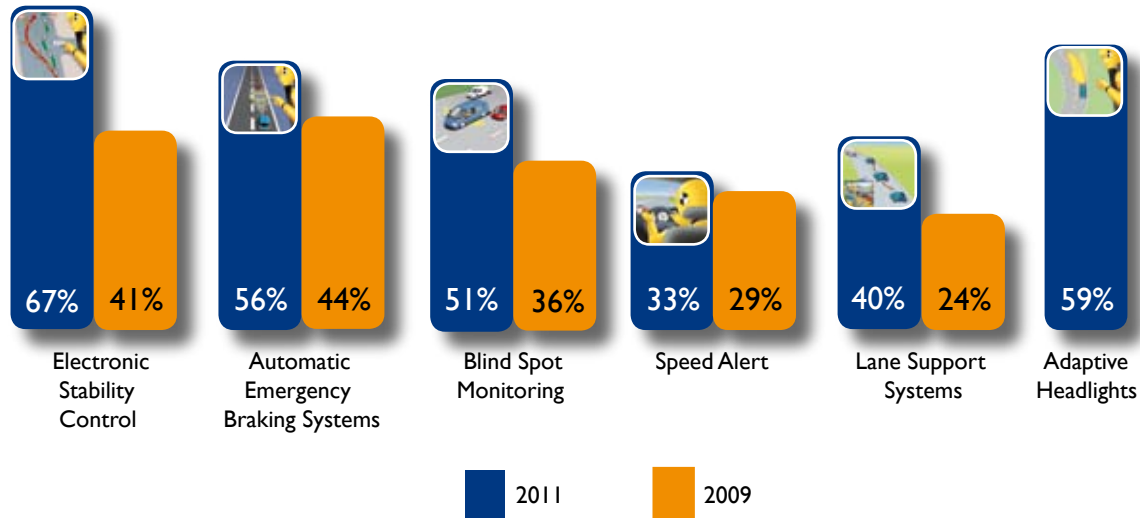
Considerable differences exist, however, between different systems and between countries. For instance, 68 per cent of Spanish respondents are aware of the Advanced Emergency Braking System, while in France awareness is lowest of all countries with only 38 per cent.



WILLINGNESS TO PAY

While vehicle safety is of top concern to car buyers, a majority of respondents see the responsibility with the manufacturer to ensure that cars are safe. At the same time - along with an increased awareness - the willingness to pay extra for eSafety systems increased since 2009. This highlights the importance of safety systems, especially when considering the above mentioned cost-consciousness of car buyers.

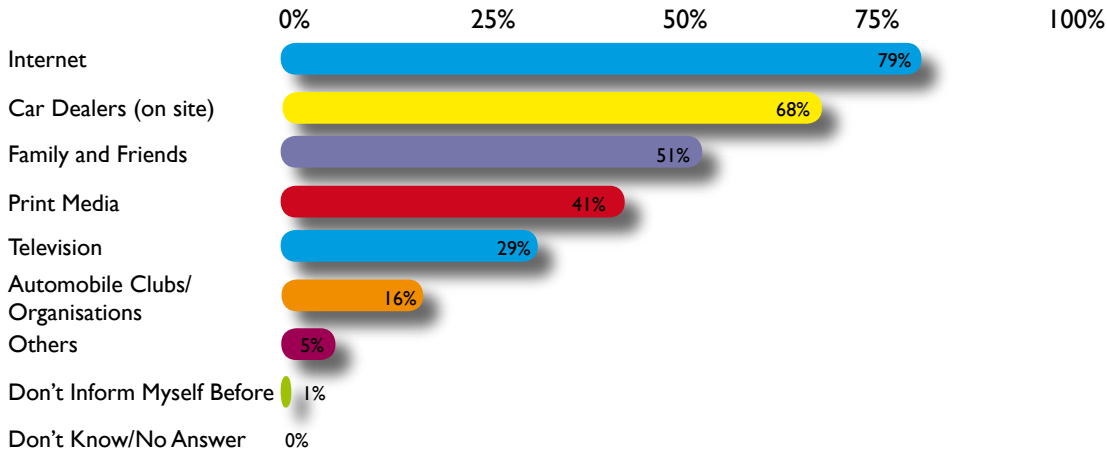
As is to be expected, willingness to pay extra is highest for the systems which are most important to car drivers - i.e. ESC, Adaptive Headlights and Automatic Emergency Braking Systems. Results show that car buyers are willing to pay more for safety features but they expect to have them fitted to their vehicles by the manufacturer.



SOURCES OF INFORMATION

The importance of car dealers and their role as purchase advisor is illustrated in the below graphic. More than two thirds of the respondents* state that car dealers are a source of information when it comes to buying a new car, just after dedicated websites, e.g. from car manufacturers. Obviously, these players have a high responsibility of providing relevant information about safety systems while the internet is the means of communication used most often.

Interestingly, men search for information from dealers and the internet more often than women. Compared to male car buyers, women rely more often on advice from family and friends.



* Aided request

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