

ESP Safety Survey UK 2006

Do drivers know their guardian angel?

June 2006

Chassis Systems Control

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Method and Samples

In a representative study, 502 drivers were interviewed in the UK.

20-Minute Telephone interviews (CATI)

Ratio Female : Male	33% : 67%
Average age of participant	49 years
Average age of car	3 years
Average miles per year	15.000 miles
Ratio New Car: Used Car	70% : 30%



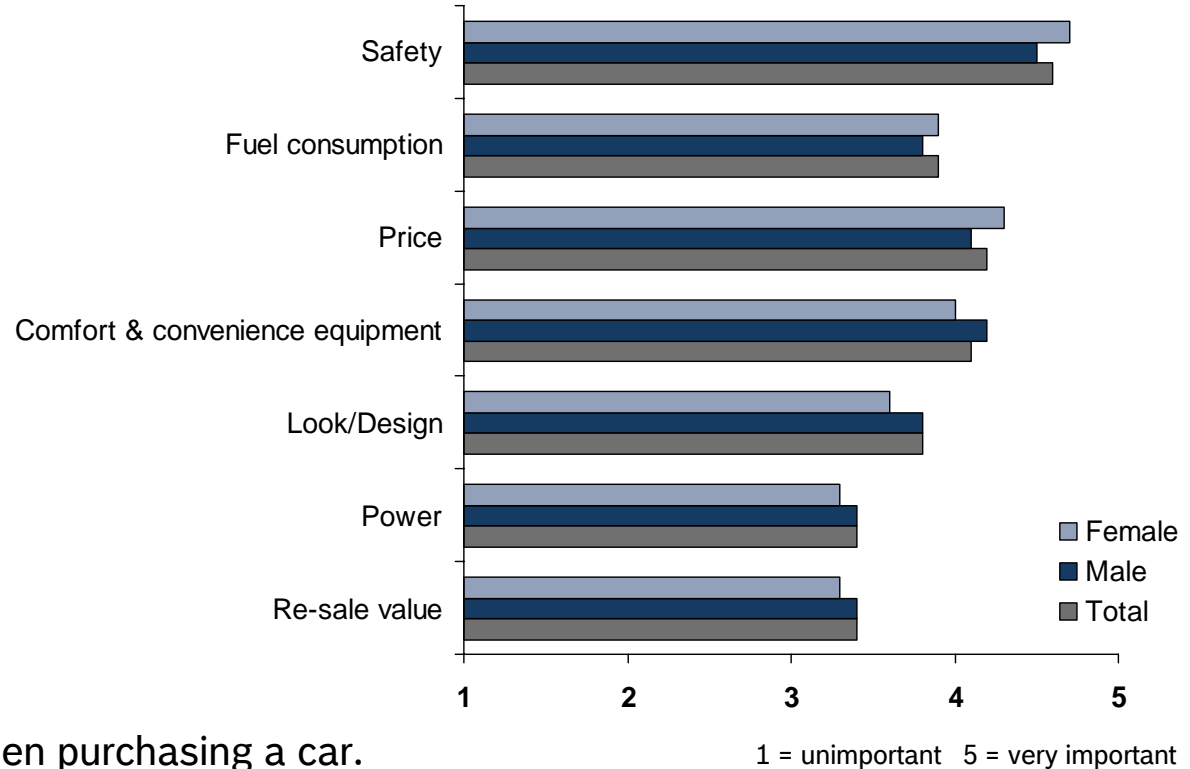
- Knowledge about safety systems
- Meaning of safety
- Safety systems and the need for information
- Attitude towards safety systems



Safety is the most important criterion

How important are the following criteria to you when purchasing a car?

Prompted question
n=502

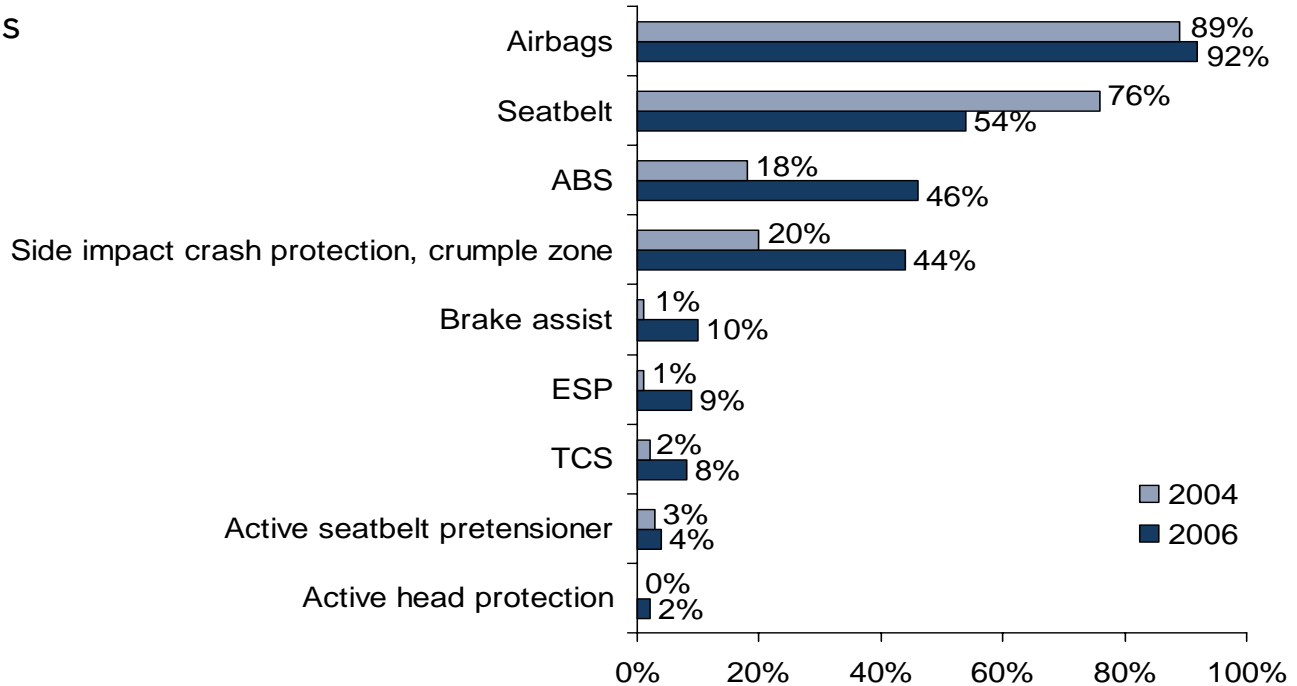


- Safety is no.1 criterion when purchasing a car.
- Fuel consumption and price and follow close.

Passive safety Systems have found their way into car buyers' minds

Which car safety systems do you know?

Unprompted question
Multiple answers possible
n=1017/502



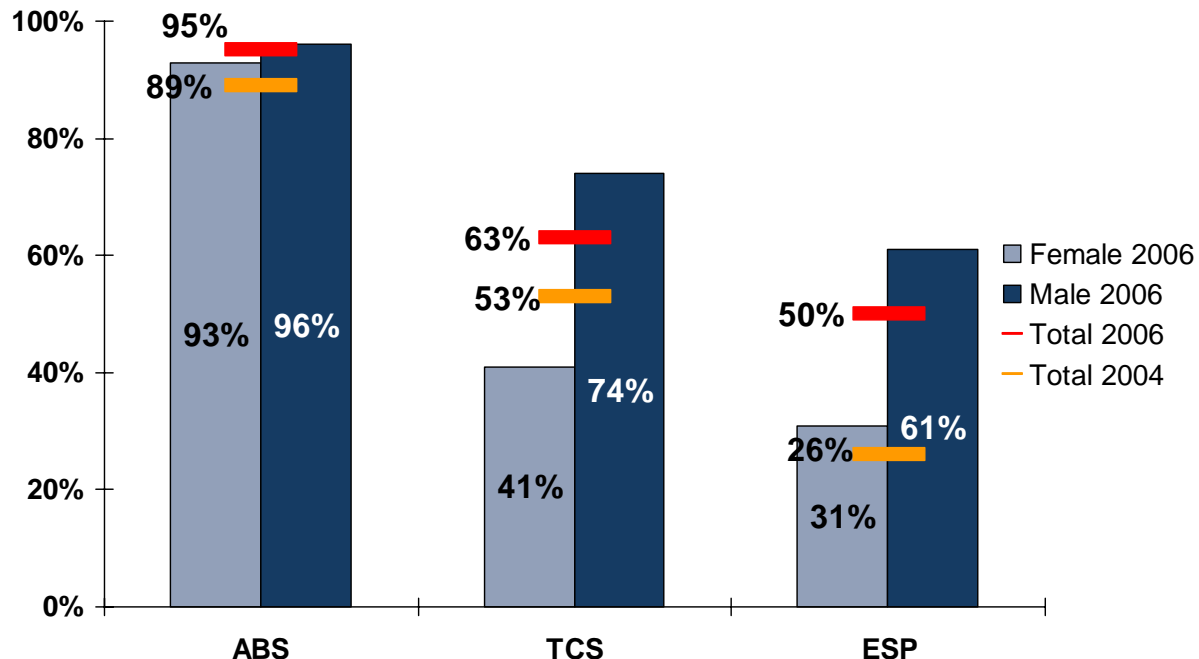
- Knowledge of ABS, ESP and TCS has increased strongly.
- Seatbelts are less often mentioned than in 2004.



Increase in awareness of active safety systems

Have you ever heard of a?

prompted question
If not mentioned spontaneously



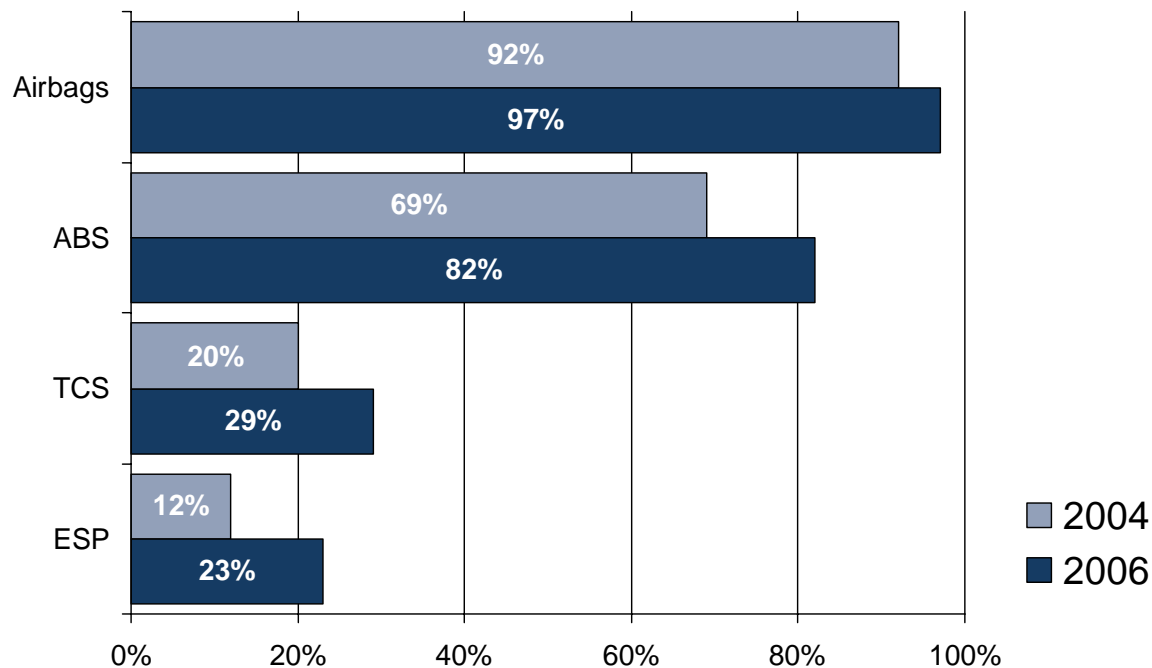
- Men are much more acquainted with ABS, ESP and TCS than women.
- ESP gains significantly in popularity.



Airbags and ABS fitted on majority of vehicles

Does your car have ...?
(Current Car)

Prompted question
Multiple answers possible
n=1017/502

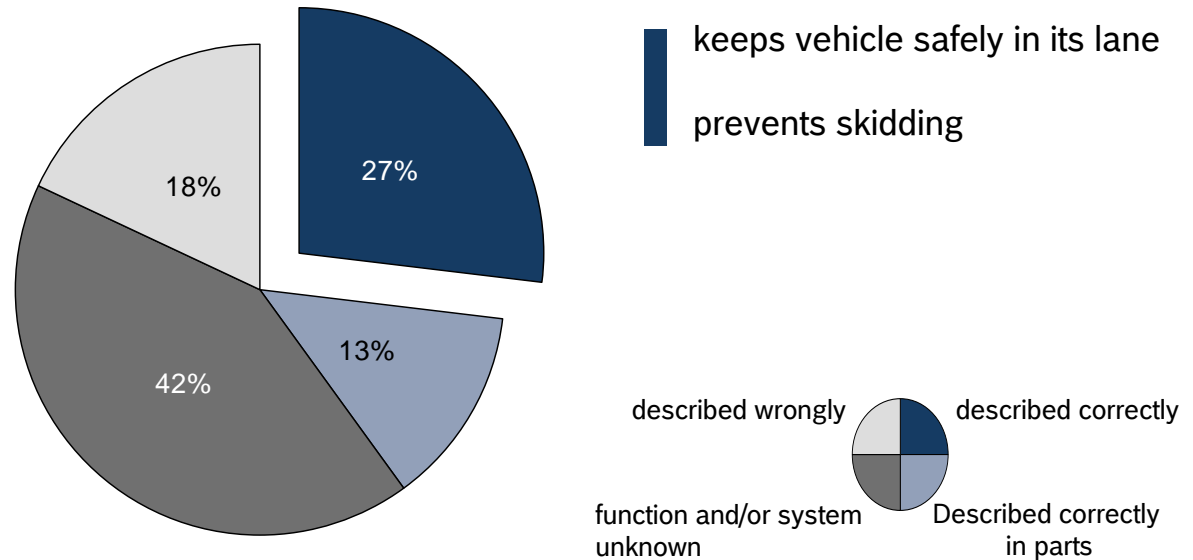


- A large majority of the respondents have airbags and ABS in their car.

Product benefits need to be communicated

If ESP is known:
What are the
benefits of ESP?

Multiple answers possible
n=274

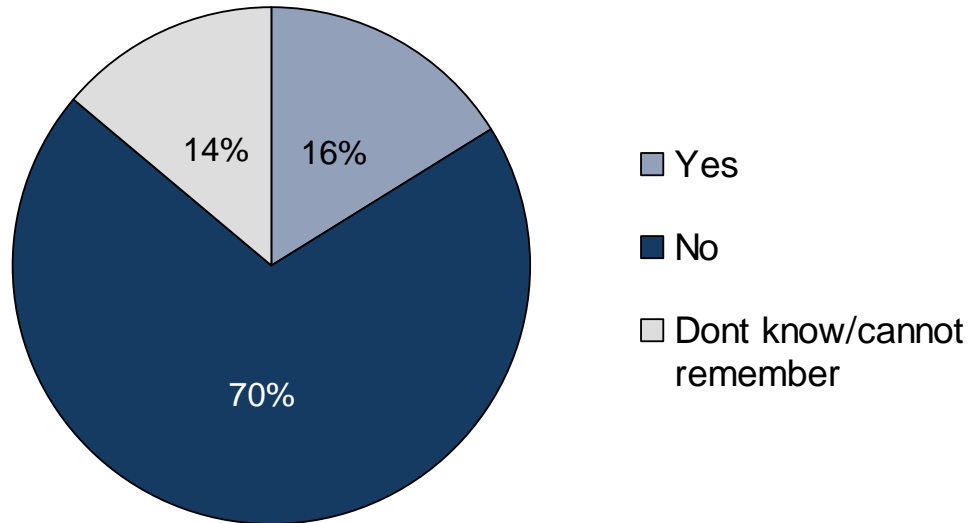


- Out of the interviewees who know what ESP is, 27% are able to describe its benefits correctly.

Car dealers do not make buyers aware of what ESP is

When you purchased your car, did the sales person (car dealer) make you aware of what ESP is?

Only if car was bought new
After the benefits of ESP were explained
n=346



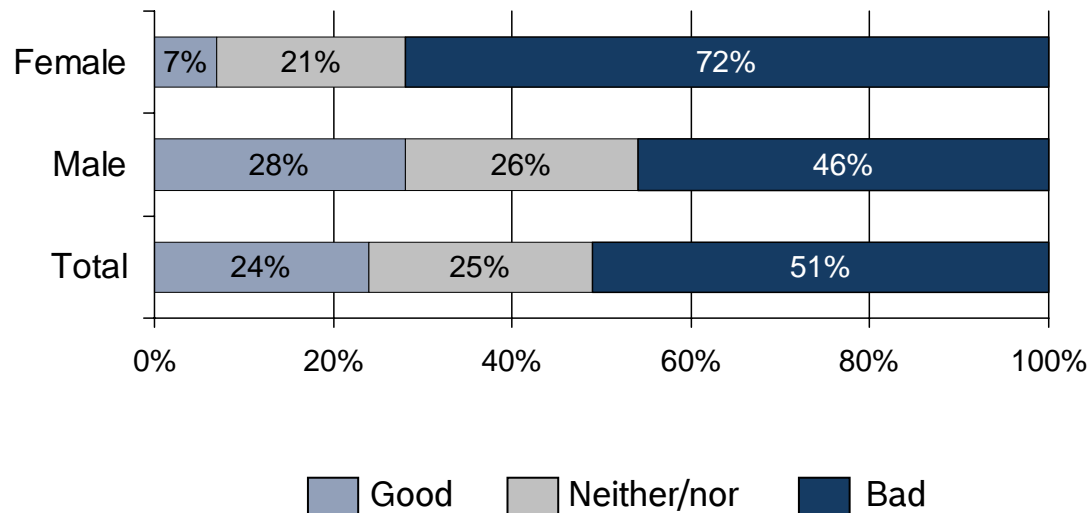
- 70% of all respondents said their dealer did not mention ESP when purchasing the car.

The need for information about ESP is high

How well informed do you feel about ESP, its benefits and functionality?

After the benefits of ESP were explained
Only if ESP is known

n=271



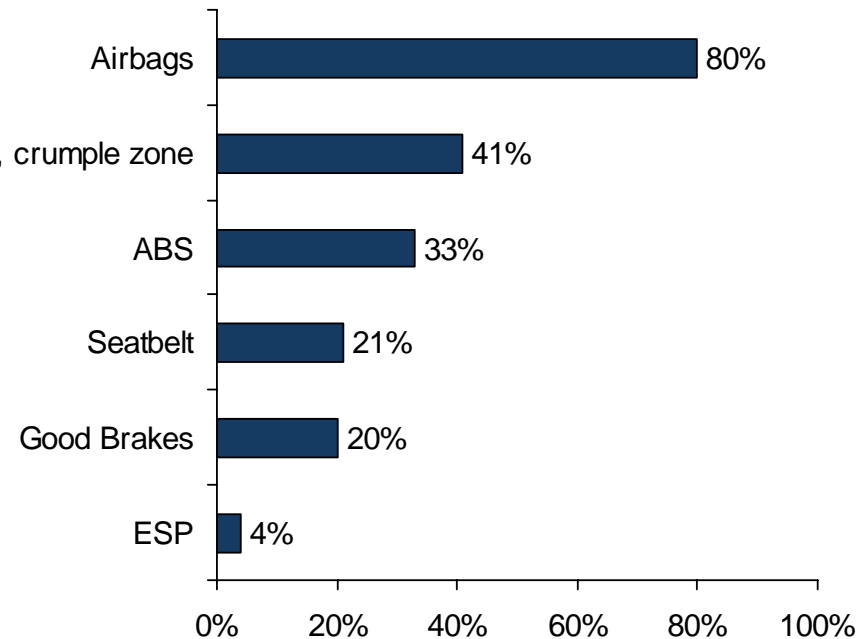
- 24% of those who stated to know or to have heard of ESP feel well informed.
- Women still have a high need for information.

Drivers associate safety mainly with accident mitigation

What is a safe car to you, which features should it have?

Unprompted question
Multiple answers possible
n=502

side impact crash protection, crumple zone

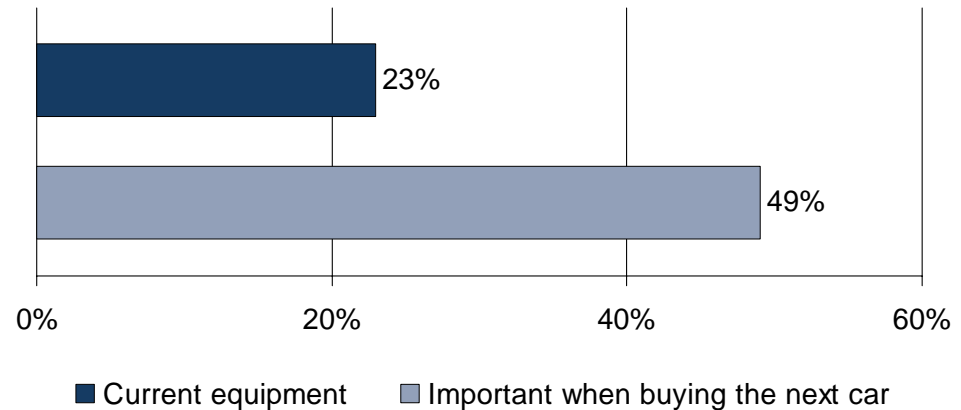


- 80% of the participants say airbags are the most important safety feature.
- The accident prevention potential of ABS and ESP in particular is not recognised.

Drivers will ask for more safety in the future

Is your car equipped with ESP?

How important in your next vehicle purchase is an electronic stability system to you?



After the benefits of ESP were explained
n=502/482

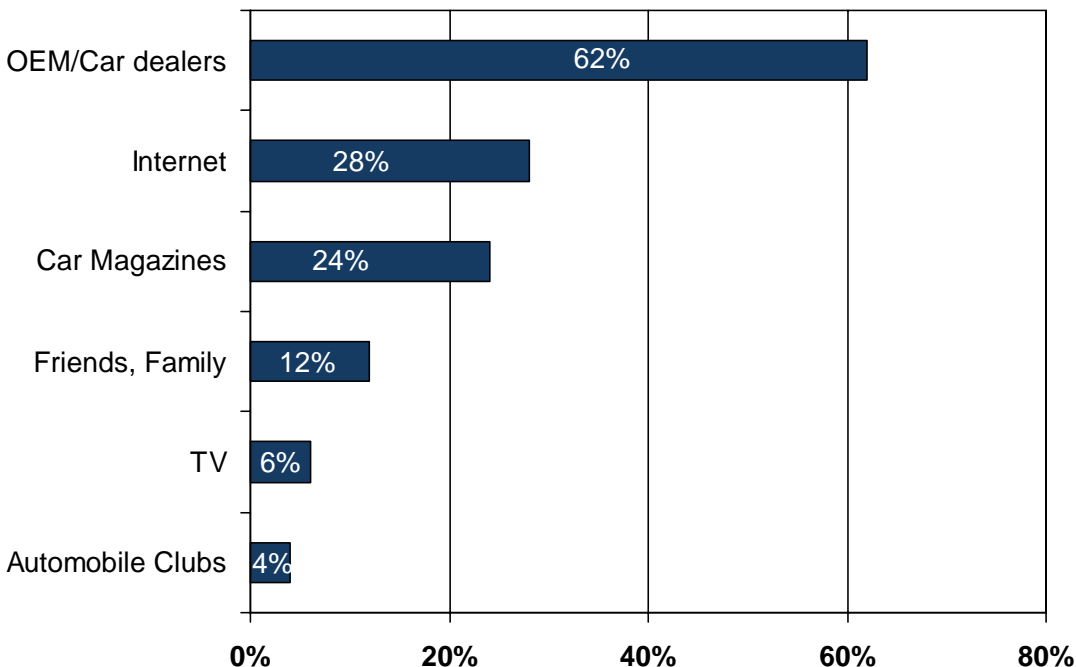
- 23% say their current car is equipped with ESP.
- After the benefits of ESP were explained, almost 50% of the respondents think that it is an important feature in the next vehicle purchase.

Car manufacturers and their sales network are the most important source of information

Where do you seek information on safety systems when purchasing a car new or second hand?

Unprompted question
Multiple answers possible

n=502

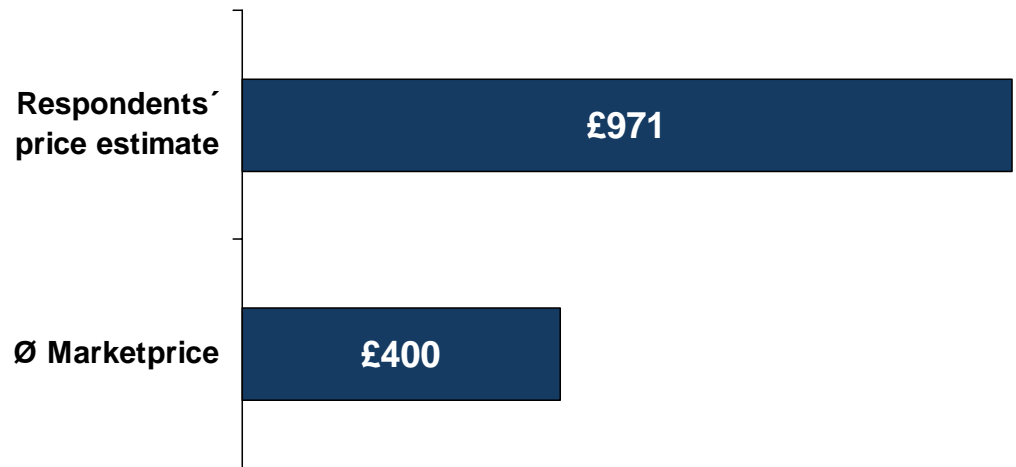


- Car manufacturers and car dealers carry the responsibility of informing car buyers.
- Modern media and specialised press come second.

Market price lies well below perceived price/value

Supposing that for your car ESP is available as optional equipment, what would you say the price is?

After the benefits of ESP were explained
n=349



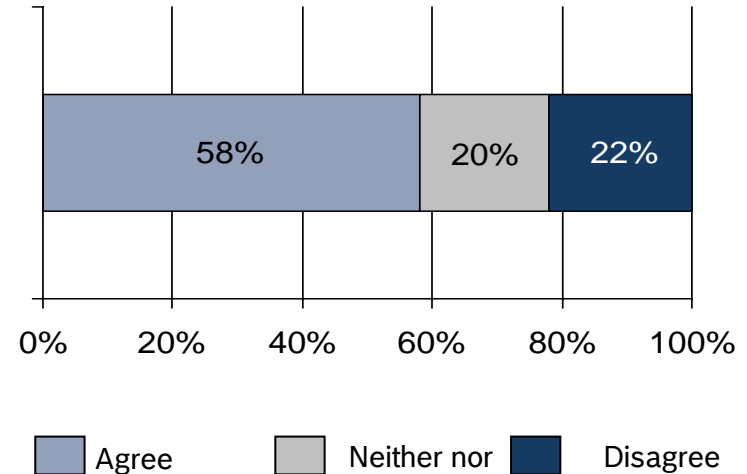
- The gap between the market price and the estimated price is significant.

Safety can become attractive through financing plans

If ESP costed – calculated on monthly rates – £ 10,-, I would definitely want ESP in my next car.

After the benefits of ESP were explained

n=480



- More than half of the respondents would want ESP in their car when paying a low monthly rate.

Safety systems should not be optional

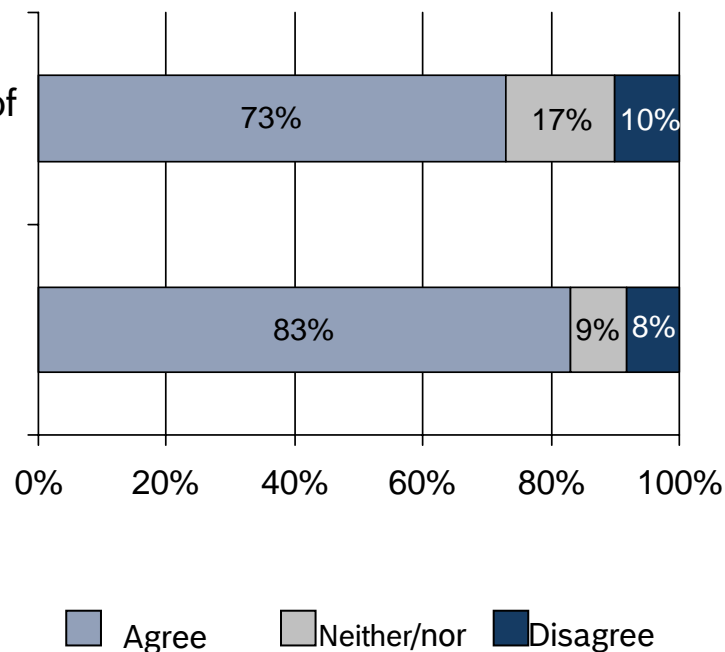
Do you agree with the following statements...?

After the benefits of ESP were explained

n=484/500

The ESP should be made part of the standard equipment.

Safety systems that prevent accidents should be made compulsory by law.



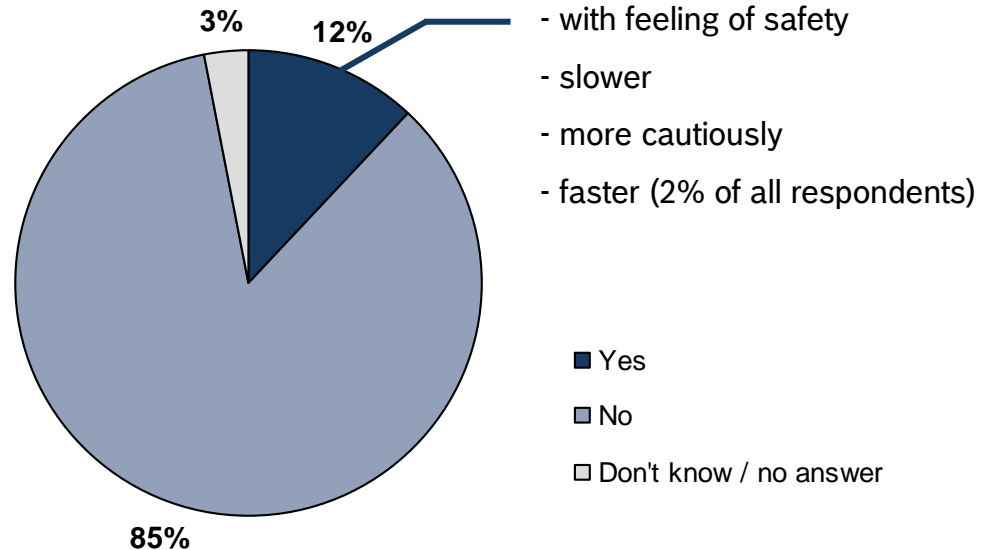
- Drivers would like to see safety systems standardised.
- The majority of drivers support a notion to have safety systems become compulsory.

A definite NO: ESP does not induce riskier driving

Have you changed your driving habits since you have had ESP in your car?

Only if ESP in own car mentioned
After the benefits of ESP were explained

n=116



- Drivers of cars with ESP do not change their driving style.
- ESP does not increase risk compensation.

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