

ESP Safety Survey Belgium & the Netherlands 2006

Do drivers know their guardian angel?

June 2006



Method and Samples

In a representative study, 500 drivers were interviewed in Belgium & the Netherlands.

20-Minute Telephone interviews (CATI)

Ratio Female : Male	43% : 57%
Average age of participant	47 years
Average age of car	4 years
Average kilometers per year	15.000 kilometers
Ratio New Car: Used Car	72% : 28%



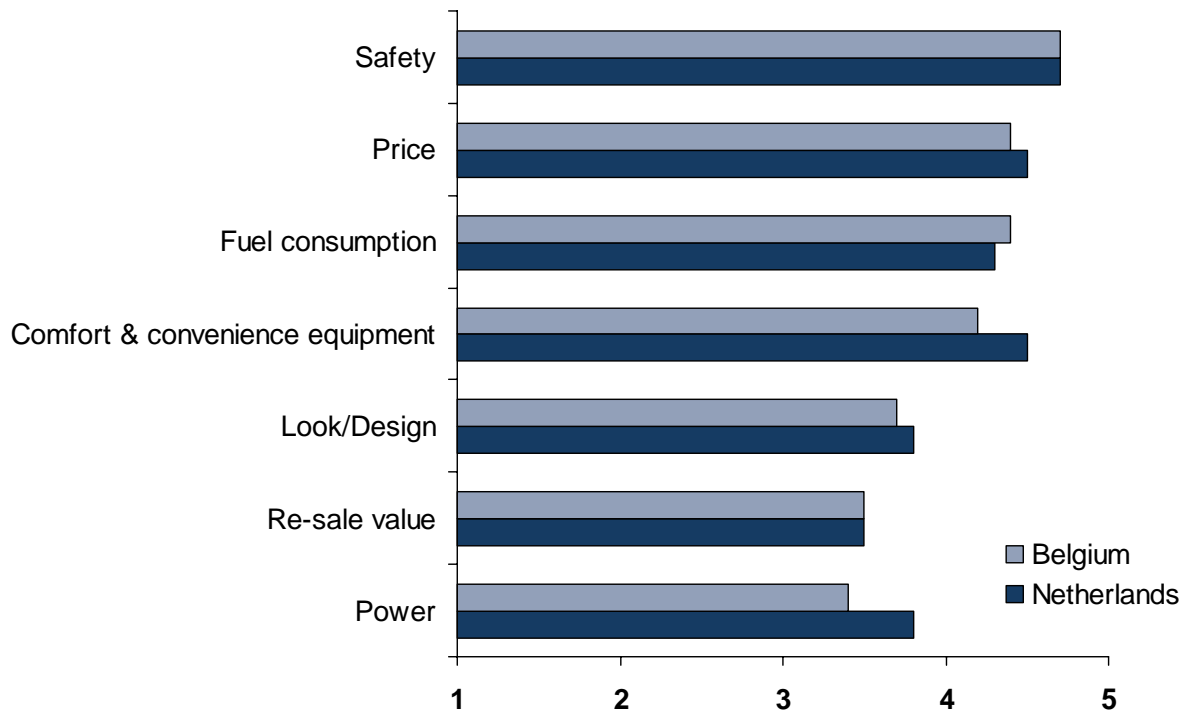
- Knowledge about safety systems
- Meaning of safety
- Safety systems and the need for information
- Attitude towards safety systems



Safety is the most important criterion

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

Prompted question
n=500



- Safety is no.1 criterion when purchasing a car.
- Price and fuel consumption follow close.

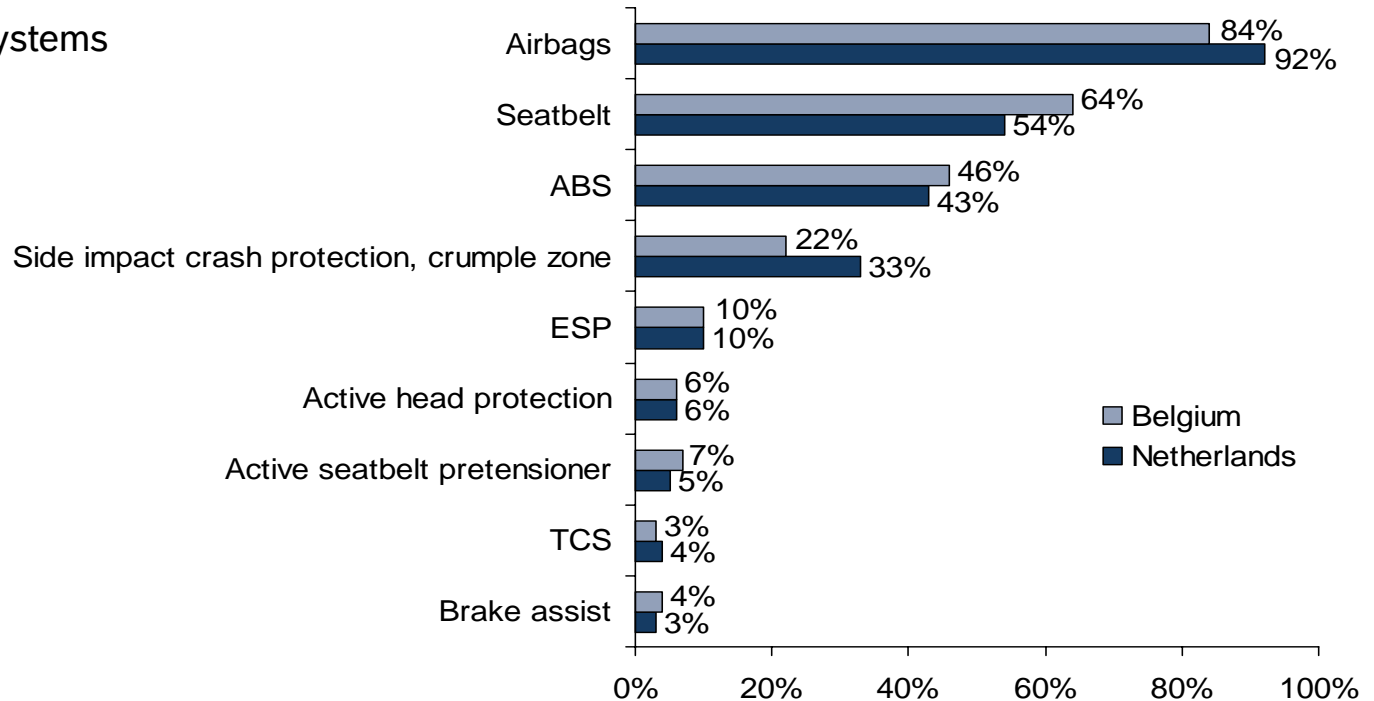
1 = unimportant, 5 = very important



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

Which car safety systems do you know?

Unprompted question
Multiple answers possible
n=500



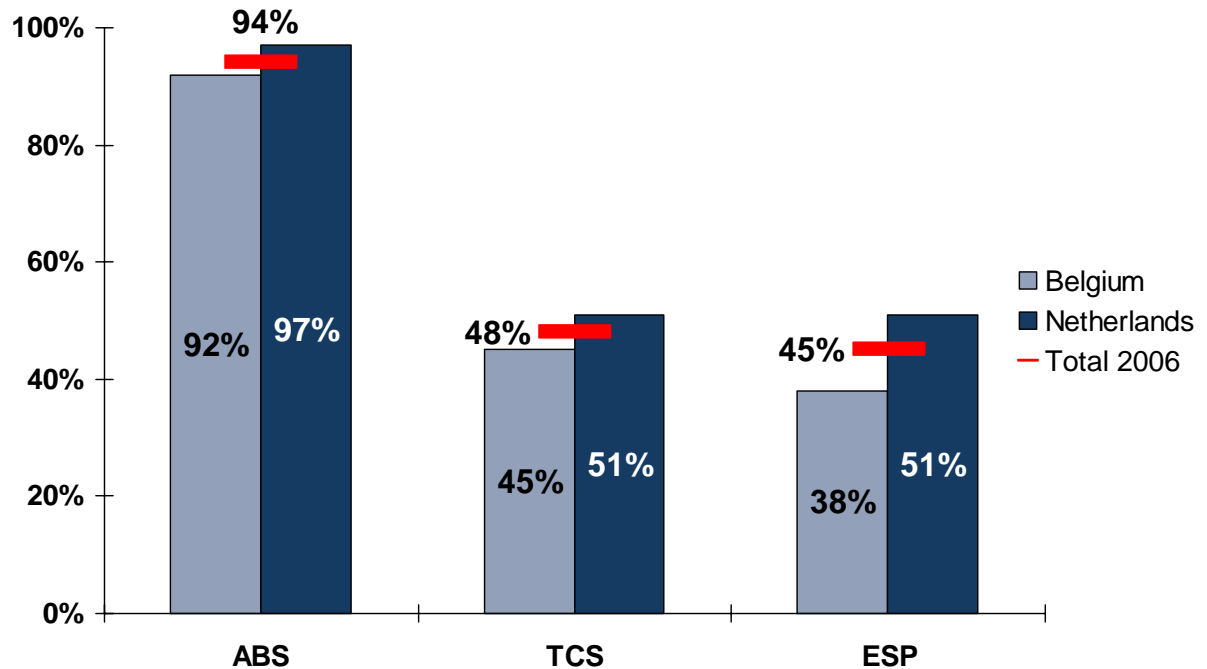
- Active safety systems are still not well known.



Knowledge of TCS and ESP still low

Have you ever heard of a?

Prompted question
If not mentioned
spontaneously in preceding
question



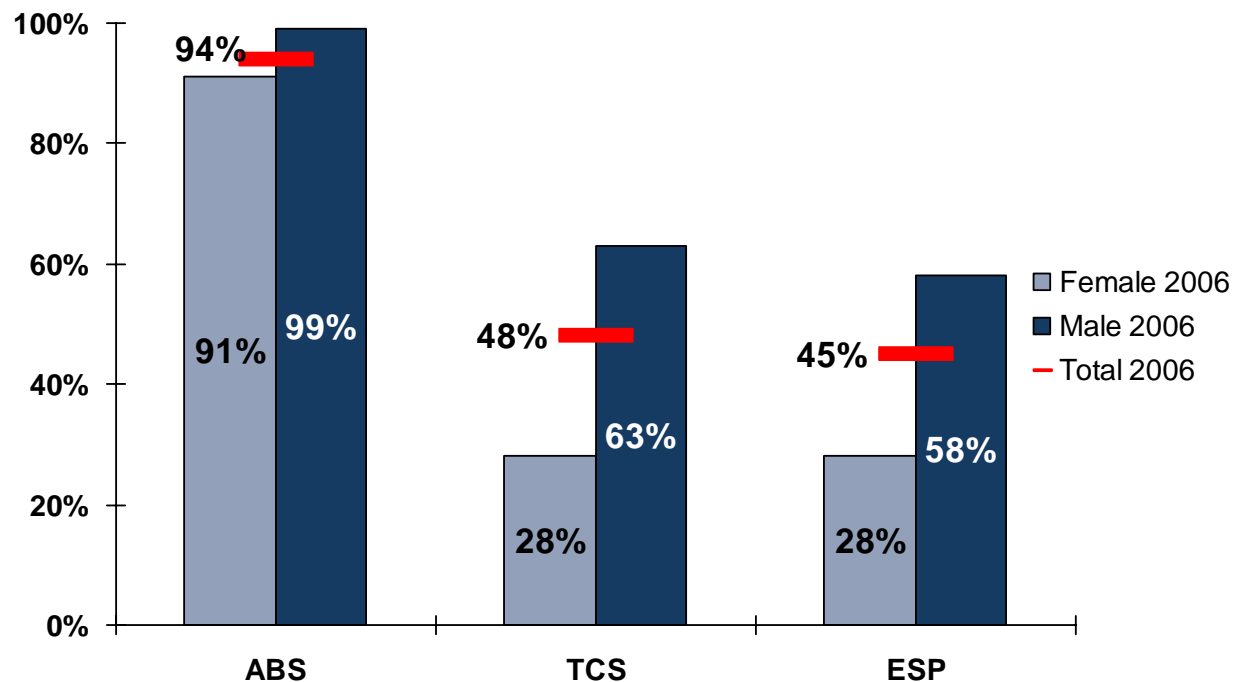
- Apart from ABS, knowledge about active safety systems is still low in both countries.
- Respondents in the Netherlands are more acquainted with ABS, ESP and TCS than respondents in Belgium.



Knowledge gap when it comes to gender

Have you ever heard of a?

Prompted question
If not mentioned spontaneously

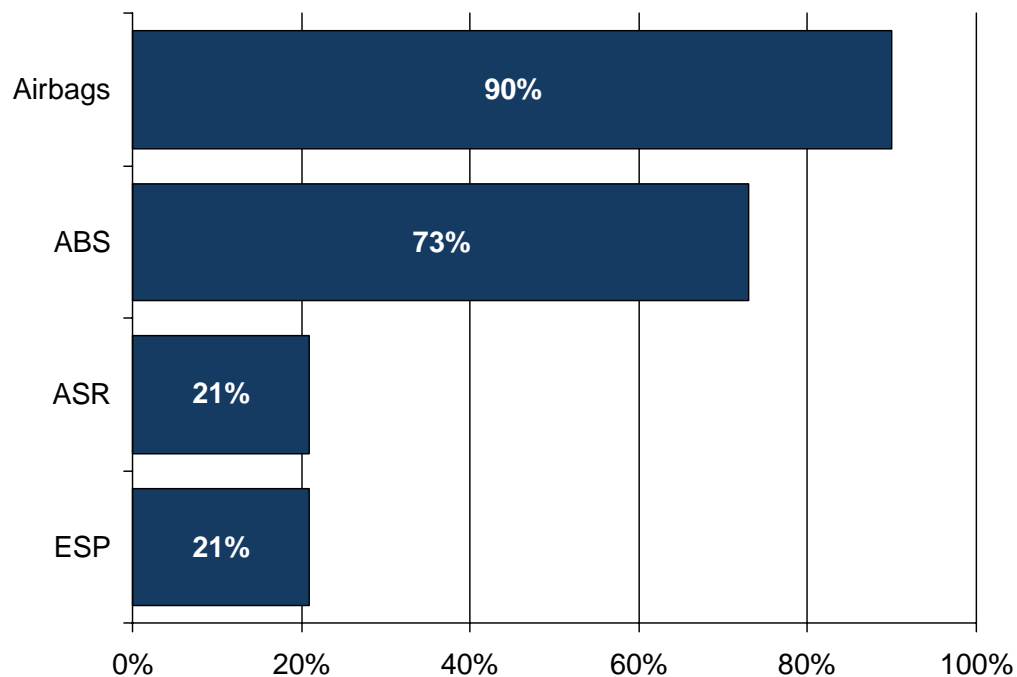


- Men are much better acquainted with ABS, ESP and TCS than women.

Airbags and ABS fitted on majority of vehicles

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

Prompted question
Multiple answers possible
n=500



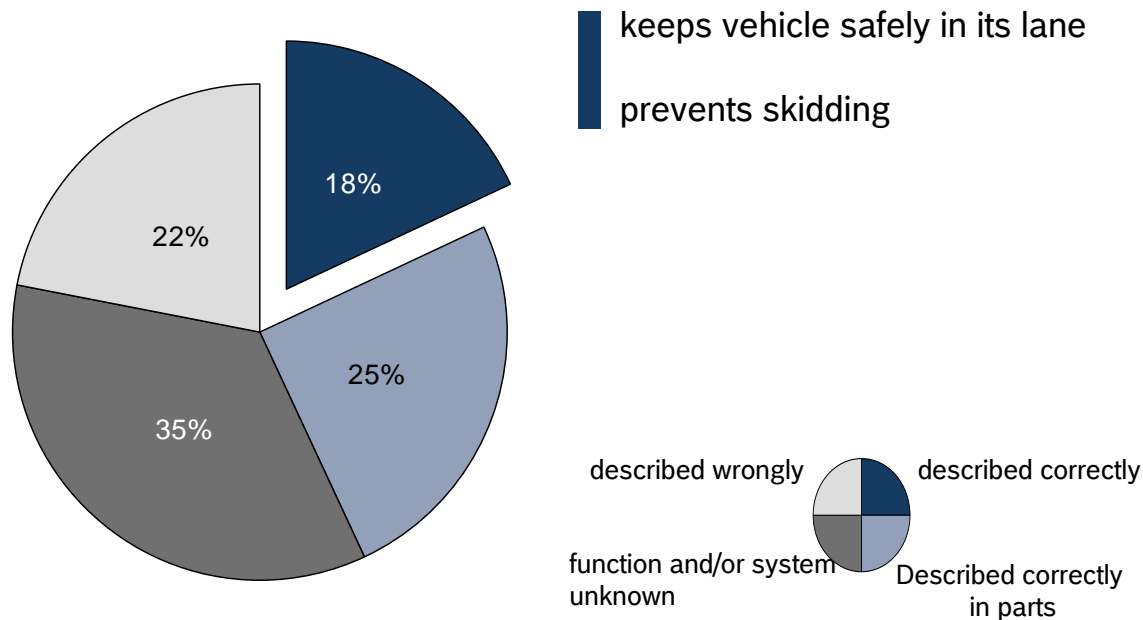
- A large majority of the respondents have airbags and ABS in their car.

Product benefits need to be communicated

If ESP is known:

What are the benefits of ESP?

Multiple answers possible
n=251

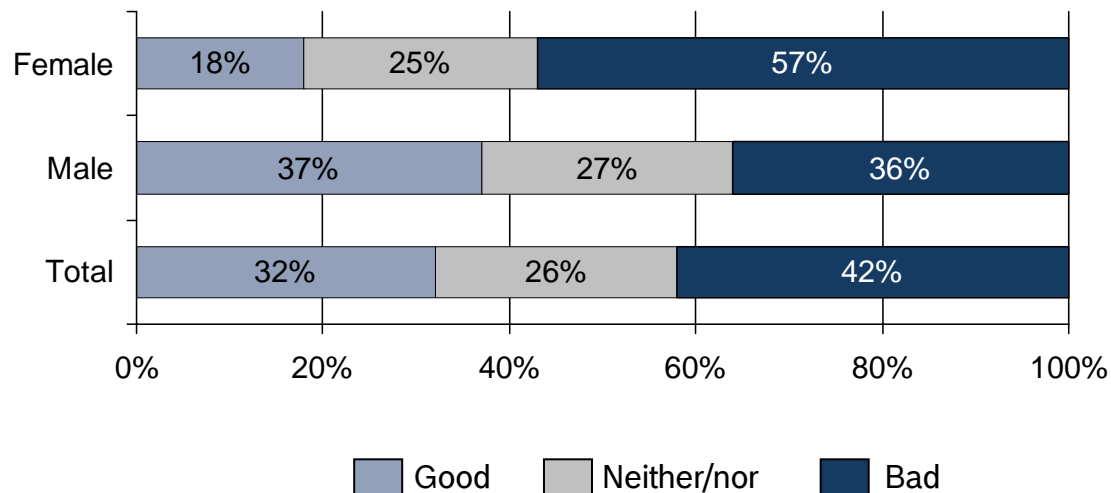


- Out of the interviewees who know what ESP is, 18% are able to describe its benefits correctly.

The need for information about ESP is high

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

After the benefits of ESP were explained
Only if ESP is known
n=238



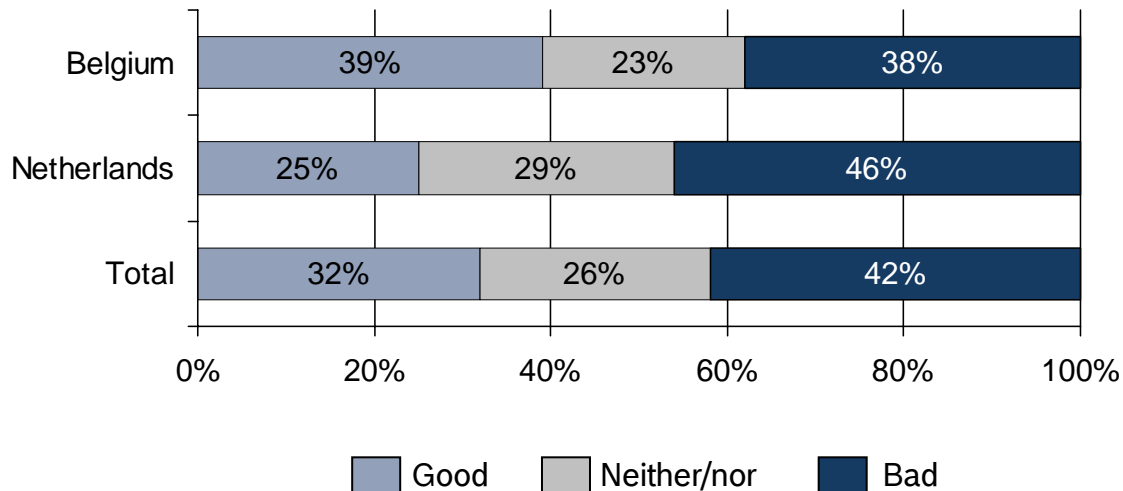
- One third of those who stated to know or to have heard of ESP feel well informed.
- Women still have a high need for information.

The need for information about ESP is high

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

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

n=238



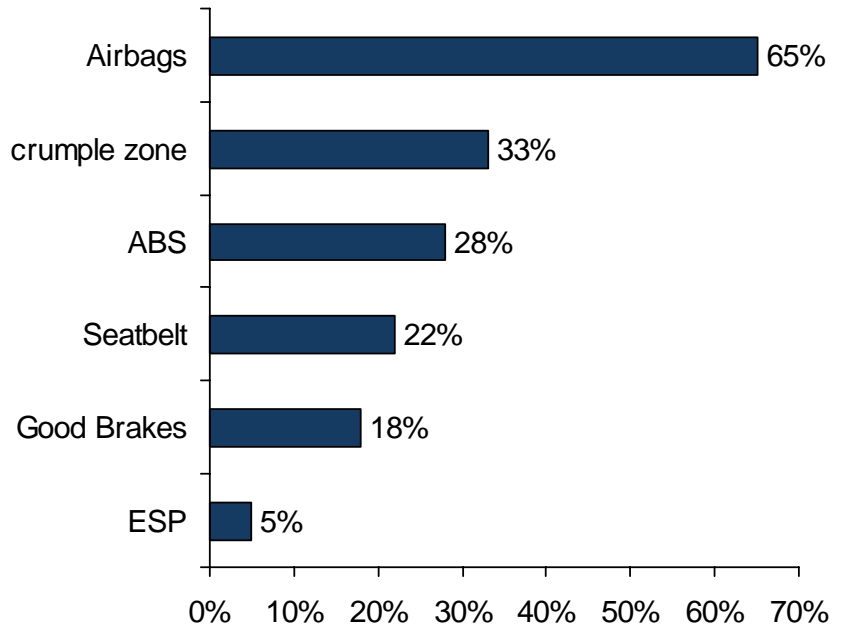
- In Belgium respondents feel slightly better informed than in the Netherlands.

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=500

Side impact crash protection, crumple zone

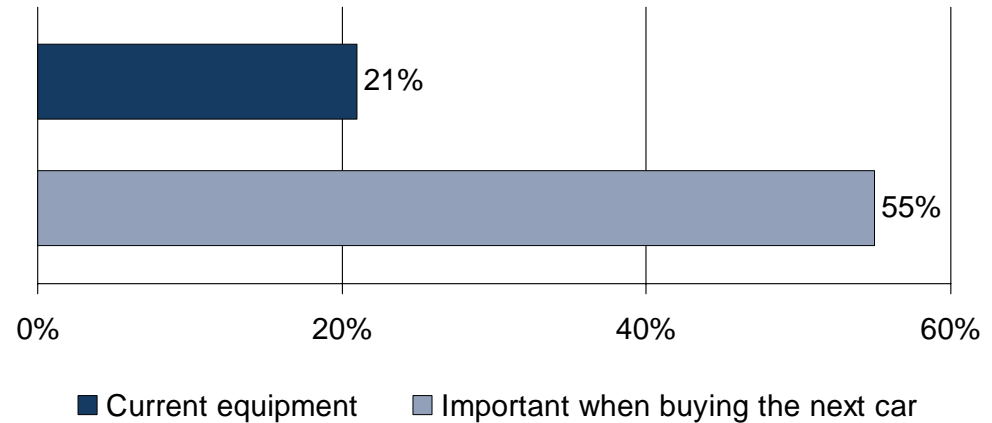


- 65% of the participants say airbags are the most important safety feature.
- The accident prevention potential of ABS and ESP in particular is not recognised.

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?



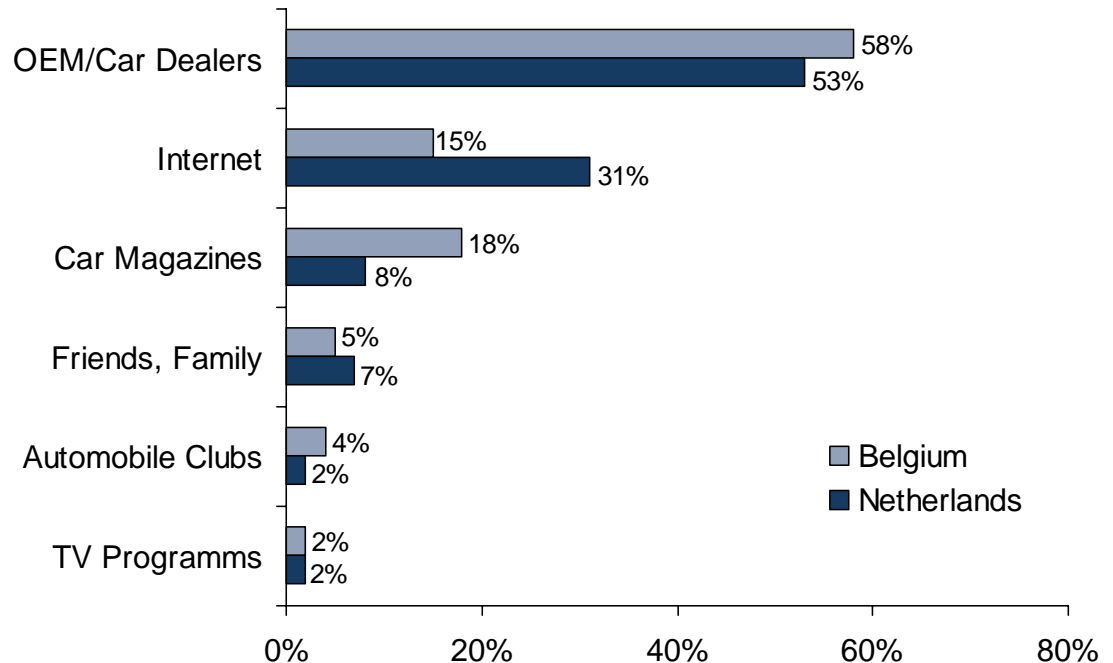
After the benefits of ESP were explained
n=500/482

- 21% say their current car is equipped with ESP.
- After the benefits of ESP were explained, more than 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 new or second-hand car?

Unprompted question
Multiple answers possible
n=500

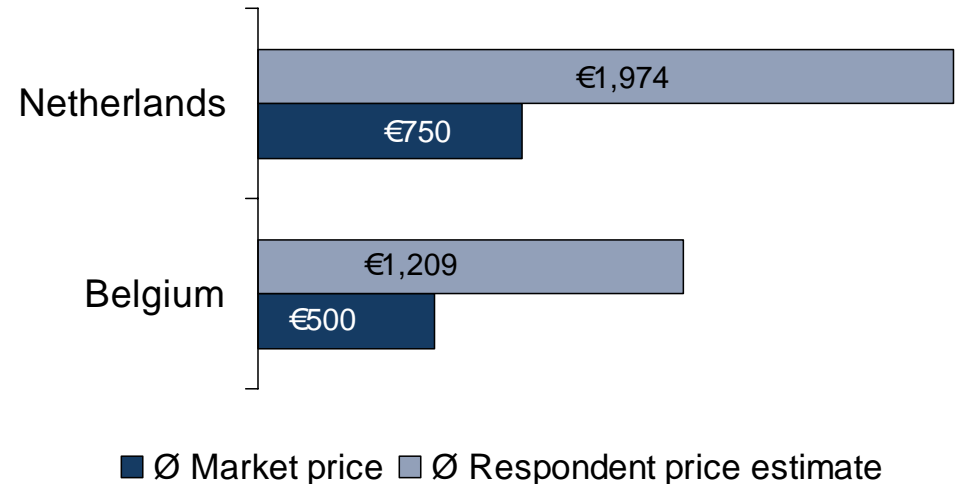


- Car manufacturers and car dealers carry the responsibility of informing car buyers.
- Modern media and specialised press come second.

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=177



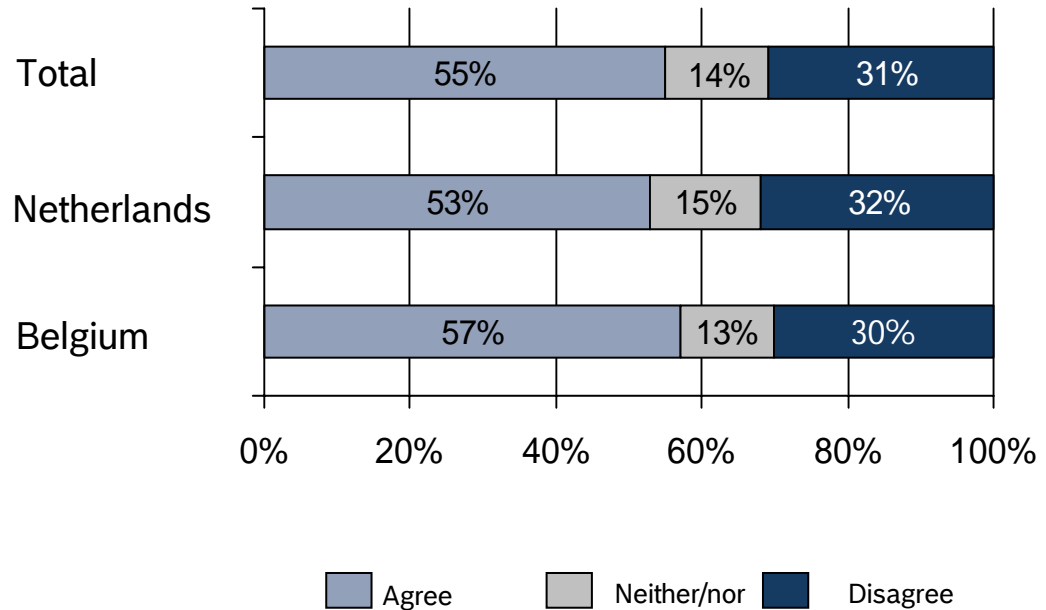
- The gap between the market price and the estimated price is significant.
- Respondents in the Netherlands deem the price much higher than respondents in Belgium.

Safety can become attractive through financing plans

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

After the benefits of ESP were explained

n=462

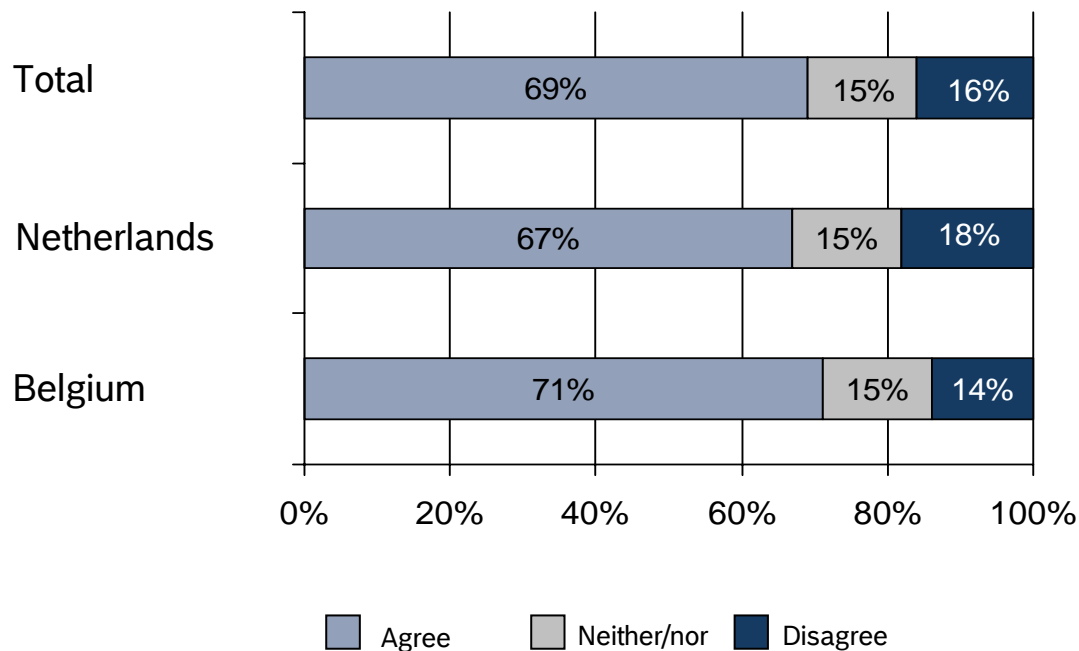


- More than half of the respondents would want ESP in their car when paying a low monthly rate.

Safety systems should not be optional

The ESP should be made part of the standard equipment.

After the benefits of ESP were explained
n=471

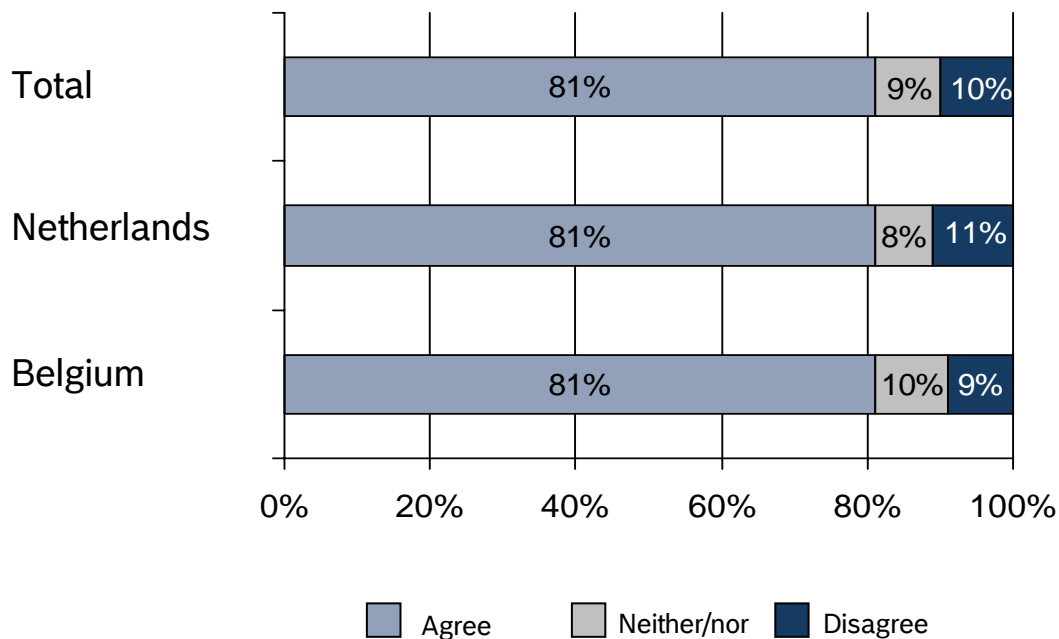


- Drivers would like to see safety systems standardised.
- The majority of drivers support a notion to have safety systems become compulsory.

Safety systems should not be optional

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

After the benefits of ESP were explained
n=496



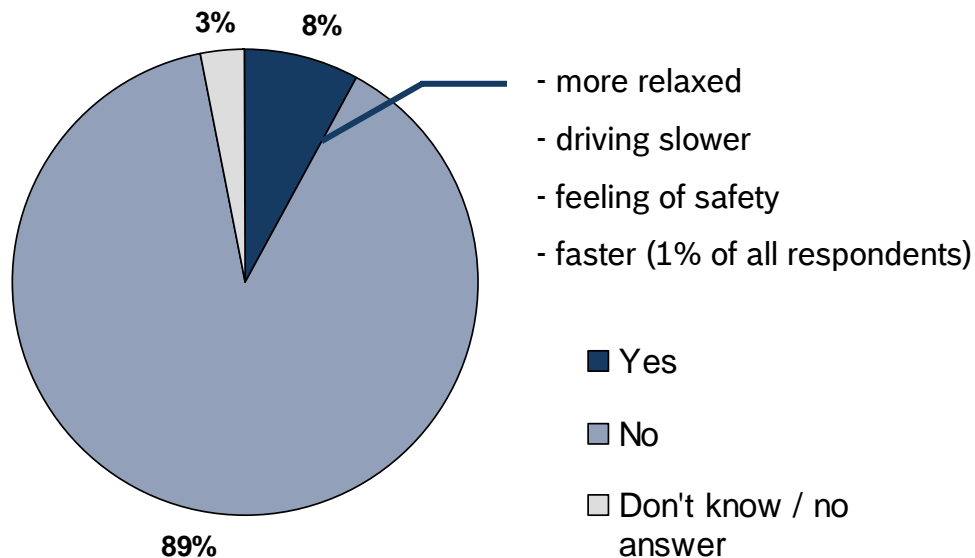
- Drivers would like to have safety systems standardised.
- The majority of drivers support a notion to have safety systems become compulsory.

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=107



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

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