

H&K Strategies - Overall

The research H&K for was carried out between: 12/05/2013 and 28/05/2013
Sample: 4325 parents who drive with children aged 17-24 and 5160 young adults who drive aged 17-24 from the UK, France, Germany, Spain and Italy

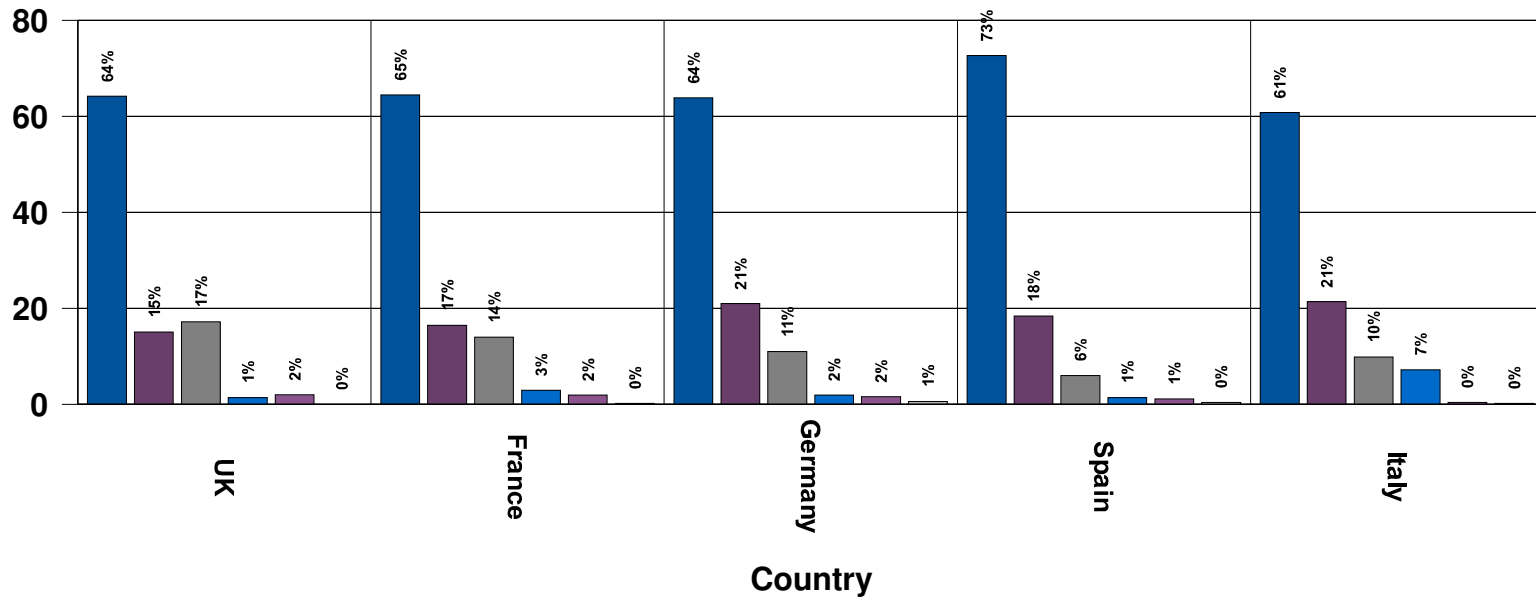
Question One Cross Tabulation With Country

Which of the following is the most important factor when thinking about the majority of journeys where you are the main driver?

Absolute Break % Respondents	Base	Country				
		UK	France	Germany	Spain	Italy
Base	9485	2149	2009	1944	1757	1626
Q1						
Getting to destination safely	6183 65.2%	1379 64.2%	1295 64.5%	1243 63.9%	1277 72.7%	989 60.8%
Travelling fuel-efficiently	1736 18.3%	324 15.1%	332 16.5%	408 21.0%	324 18.4%	348 21.4%
Getting to destination quickly	1132 11.9%	370 17.2%	281 14.0%	214 11.0%	106 6.0%	161 9.9%
Getting to destination in style	267 2.8%	31 1.4%	59 2.9%	36 1.9%	24 1.4%	117 7.2%
None of the above	140 1.5%	44 2.0%	38 1.9%	32 1.6%	19 1.1%	7 0.4%
Showing off to my friends whilst on the journey	27 0.3%	1 0.0%	4 0.2%	11 0.6%	7 0.4%	4 0.2%

Question One Cross Tabulation With Country

Which of the following is the most important factor when thinking about the majority of journeys where you are the main driver?



- Getting to destination safely
- Travelling fuel-efficiently
- Getting to destination quickly
- Getting to destination in style
- None of the above
- Showing off to my friends whilst on the journey

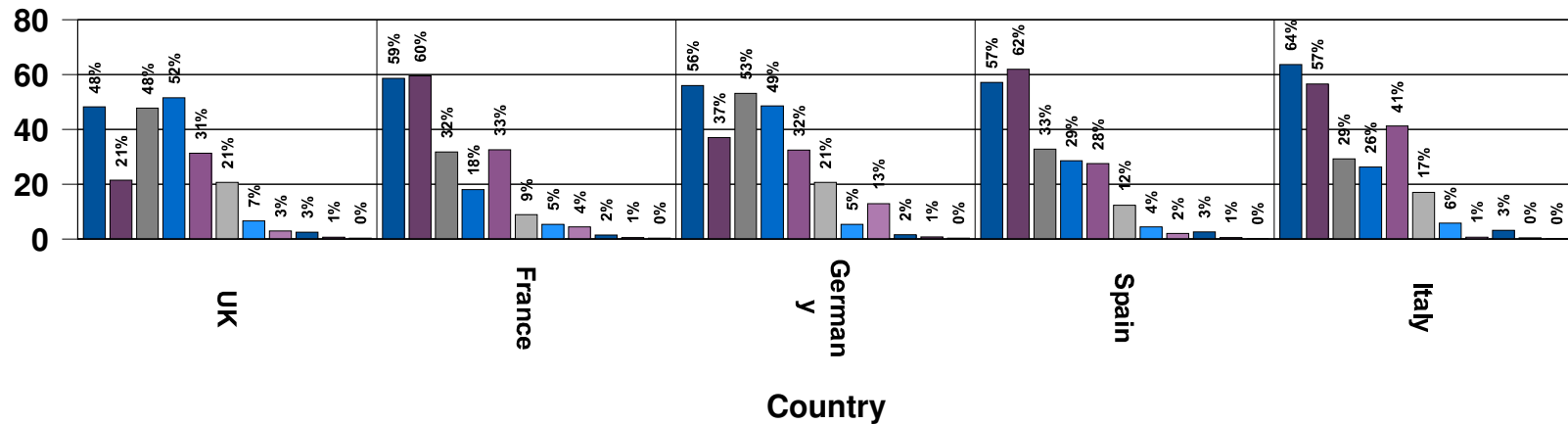
Question Two Cross Tabulation With Country

What do you think is the main safety risk to people aged 17-24 whilst driving?

Absolute Break % Respondents	Base	Country				
		UK	France	Germany	Spain	Italy
Base	9485	2149	2009	1944	1757	1626
Q2						
Speeding	5342 56.3%	1036 48.2%	1179 58.7%	1089 56.0%	1003 57.1%	1035 63.7%
Driving under the influence of excess alcohol or illegal drugs	4380 46.2%	459 21.4%	1195 59.5%	719 37.0%	1087 61.9%	920 56.6%
Lack of driving experience	3752 39.6%	1028 47.8%	639 31.8%	1032 53.1%	576 32.8%	477 29.3%
Pressure or distraction from friends when driving	3343 35.2%	1107 51.5%	362 18.0%	945 48.6%	502 28.6%	427 26.3%
Distraction (any activities that take eyes off the road and hands off the wheel including mobile use, eating, changing etc)	3110 32.8%	673 31.3%	654 32.6%	630 32.4%	483 27.5%	670 41.2%
Playing loud music in a vehicle	1518 16.0%	444 20.7%	179 8.9%	403 20.7%	216 12.3%	276 17.0%
Other drivers	522 5.5%	142 6.6%	106 5.3%	103 5.3%	77 4.4%	94 5.8%
Road rage	446 4.7%	63 2.9%	89 4.4%	250 12.9%	35 2.0%	9 0.6%
Cyclists on the road	214 2.3%	53 2.5%	31 1.5%	32 1.6%	46 2.6%	52 3.2%
Other please specify	54 0.6%	13 0.6%	10 0.5%	16 0.8%	9 0.5%	6 0.4%
Children / babies / pets	21 0.2%	6 0.3%	7 0.3%	6 0.3%	1 0.1%	1 0.1%

Question Two Cross Tabulation With Country

What do you think is the main safety risk to people aged 17-24 whilst driving?



- Speeding
- Driving under the influence of excess alcohol or illegal drugs
- Lack of driving experience
- Pressure or distraction from friends when driving
- Distraction (any activities that take eyes off the road and hands off the wheel including mobile use, eating, changing etc)
- Playing loud music in a vehicle
- Other drivers
- Road rage
- Cyclists on the road
- Other please specify
- Children / babies / pets

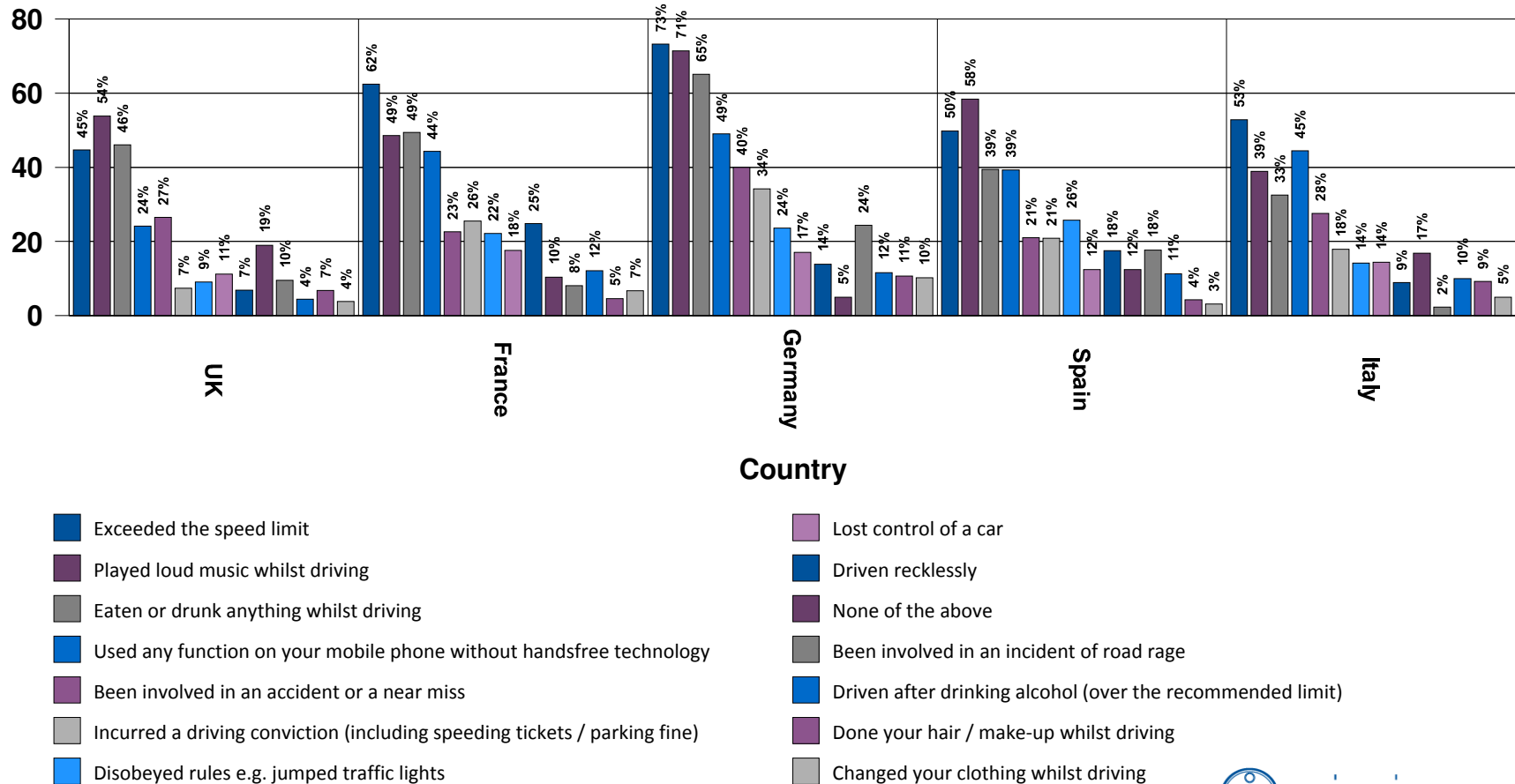
Question Three Cross Tabulation With Country

In your experience of being a driver which of the following have you ever done any of the following?

Absolute Break % Respondents	Base	Country				
		UK	France	Germany	Spain	Italy
Base	5160	1149	1002	1001	1002	1006
Q3						
Exceeded the speed limit	2902 56.2%	514 44.7%	625 62.4%	733 73.2%	499 49.8%	531 52.8%
Played loud music whilst driving	2796 54.2%	618 53.8%	487 48.6%	715 71.4%	585 58.4%	391 38.9%
Eaten or drunk anything whilst driving	2399 46.5%	530 46.1%	495 49.4%	652 65.1%	395 39.4%	327 32.5%
Used any function on your mobile phone without handsfree technology	2053 39.8%	277 24.1%	444 44.3%	490 49.0%	394 39.3%	448 44.5%
Been involved in an accident or a near miss	1419 27.5%	305 26.5%	226 22.6%	400 40.0%	210 21.0%	278 27.6%
Incurred a driving conviction (including speeding tickets / parking fine)	1072 20.8%	85 7.4%	256 25.5%	342 34.2%	209 20.9%	180 17.9%
Disobeyed rules e.g. jumped traffic lights	963 18.7%	104 9.1%	222 22.2%	236 23.6%	258 25.7%	143 14.2%
Lost control of a car	745 14.4%	129 11.2%	176 17.6%	171 17.1%	124 12.4%	145 14.4%
Driven recklessly	731 14.2%	79 6.9%	248 24.8%	139 13.9%	175 17.5%	90 8.9%
None of the above	665 12.9%	218 19.0%	104 10.4%	50 5.0%	124 12.4%	169 16.8%
Been involved in an incident of road rage	634 12.3%	109 9.5%	81 8.1%	244 24.4%	177 17.7%	23 2.3%
Driven after drinking alcohol (over the recommended limit)	501 9.7%	50 4.4%	121 12.1%	116 11.6%	113 11.3%	101 10.0%
Done your hair / make-up whilst driving	367 7.1%	78 6.8%	46 4.6%	107 10.7%	43 4.3%	93 9.2%
Changed your clothing whilst driving	294 5.7%	44 3.8%	67 6.7%	102 10.2%	31 3.1%	50 5.0%

Question Three Cross Tabulation With Country

In your experience of being a driver which of the following have you ever done any of the following?



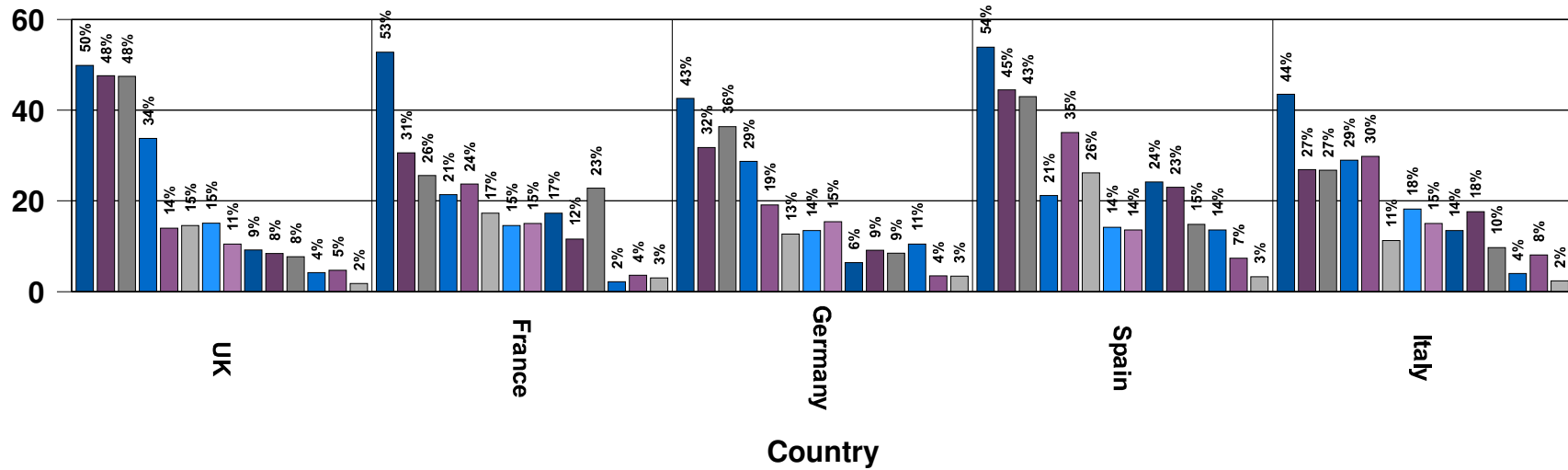
Question Four Cross Tabulation With Country

Thinking back to when you were a young driver, which of the following did you ever do?

Absolute Break % Respondents	Base	Country				
		UK	France	Germany	Spain	Italy
Base	4325	1000	1007	943	755	620
Q4						
Exceeded the speed limit	2110 48.8%	499 49.9%	532 52.8%	402 42.6%	407 53.9%	270 43.5%
Eaten or drunk anything whilst driving	1587 36.7%	476 47.6%	308 30.6%	300 31.8%	336 44.5%	167 26.9%
Played loud music whilst driving	1567 36.2%	475 47.5%	258 25.6%	343 36.4%	325 43.0%	166 26.8%
Been involved in an accident or a near miss	1164 26.9%	338 33.8%	215 21.4%	271 28.7%	160 21.2%	180 29.0%
Incurred a driving conviction (including speeding tickets / parking fine)	1009 23.3%	140 14.0%	239 23.7%	180 19.1%	265 35.1%	185 29.8%
Driven after drinking alcohol (over the recommended limit)	708 16.4%	146 14.6%	174 17.3%	120 12.7%	198 26.2%	70 11.3%
None of the above	645 14.9%	151 15.1%	147 14.6%	127 13.5%	107 14.2%	113 18.2%
Lost control of a car	597 13.8%	105 10.5%	151 15.0%	145 15.4%	103 13.6%	93 15.0%
Disobeyed rules e.g. jumped traffic lights	593 13.7%	92 9.2%	174 17.3%	60 6.4%	183 24.2%	84 13.5%
Used any function on your mobile phone without handsfree technology	570 13.2%	84 8.4%	117 11.6%	86 9.1%	174 23.0%	109 17.6%
Driven recklessly	559 12.9%	77 7.7%	230 22.8%	80 8.5%	112 14.8%	60 9.7%
Been involved in an incident of road rage	291 6.7%	42 4.2%	22 2.2%	99 10.5%	103 13.6%	25 4.0%
Done your hair / make-up whilst driving	222 5.1%	47 4.7%	36 3.6%	33 3.5%	56 7.4%	50 8.1%
Changed your clothing whilst driving	120 2.8%	18 1.8%	30 3.0%	32 3.4%	25 3.3%	15 2.4%

Question Four Cross Tabulation With Country

Thinking back to when you were a young driver, which of the following did you ever do?



- Exceeded the speed limit
- Eaten or drunk anything whilst driving
- Played loud music whilst driving
- Been involved in an accident or a near miss
- Incurred a driving conviction (including speeding tickets / parking fine)
- Driven after drinking alcohol (over the recommended limit)
- None of the above
- Lost control of a car
- Disobeyed rules e.g. jumped traffic lights
- Used any function on your mobile phone without handsfree technology
- Driven recklessly
- Been involved in an incident of road rage
- Done your hair / make-up whilst driving
- Changed your clothing whilst driving

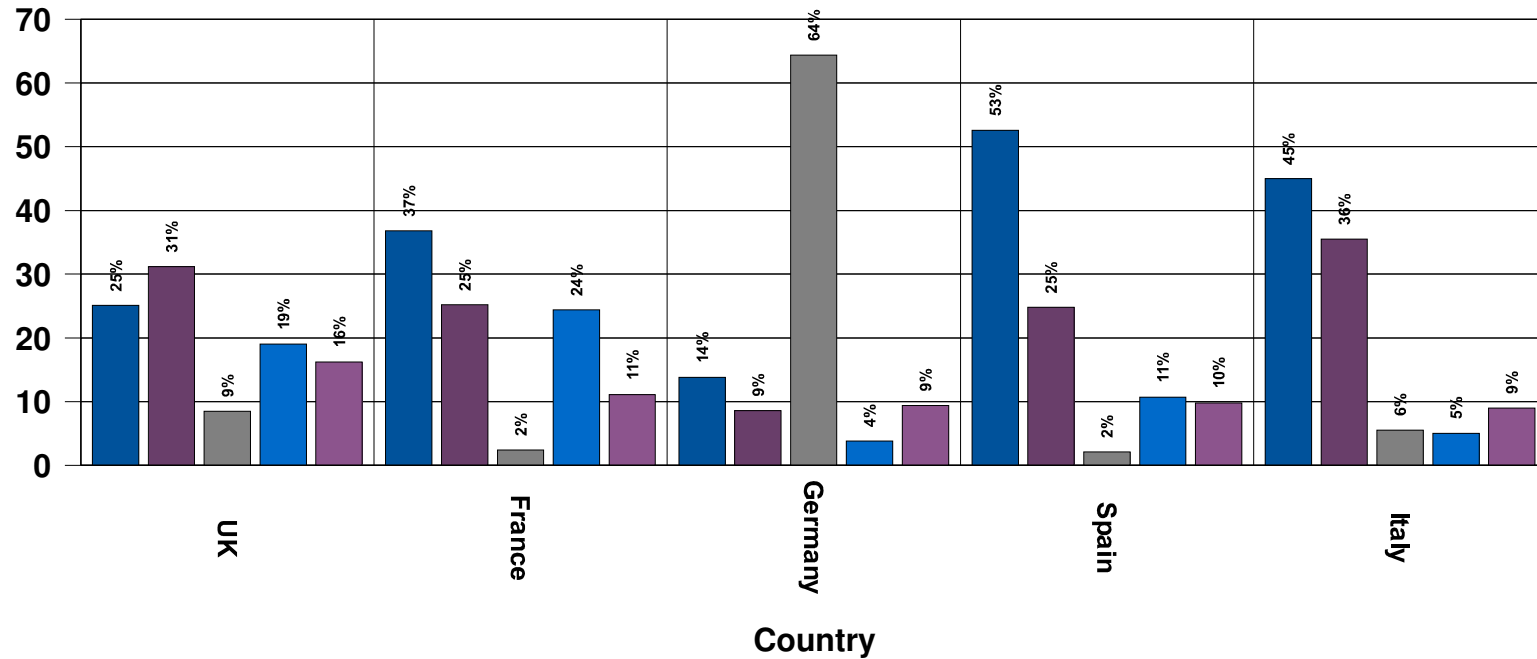
Question Five Cross Tabulation With Country

As your child approaches / approached their late teens, which of the following are you / were you most concerned about?

Absolute Break % Respondents	Base	Country				
		UK	France	Germany	Spain	Italy
Base	4325	1000	1007	943	755	620
Q5						
Your child taking drugs / smoking / drinking	1428 33.0%	251 25.1%	371 36.8%	130 13.8%	397 52.6%	279 45.0%
Your child being involved in a driving accident	1054 24.4%	312 31.2%	254 25.2%	81 8.6%	187 24.8%	220 35.5%
None of the above	766 17.7%	85 8.5%	24 2.4%	607 64.4%	16 2.1%	34 5.5%
Your child been mugged / attacked	584 13.5%	190 19.0%	246 24.4%	36 3.8%	81 10.7%	31 5.0%
Your child losing their job/failing at school/college	493 11.4%	162 16.2%	112 11.1%	89 9.4%	74 9.8%	56 9.0%

Question Five Cross Tabulation With Country

As your child approaches / approached their late teens, which of the following are you / were you most concerned about?



- Your child taking drugs / smoking / drinking
- Your child being involved in a driving accident
- None of the above
- Your child been mugged / attacked
- Your child losing their job/failing at school/college

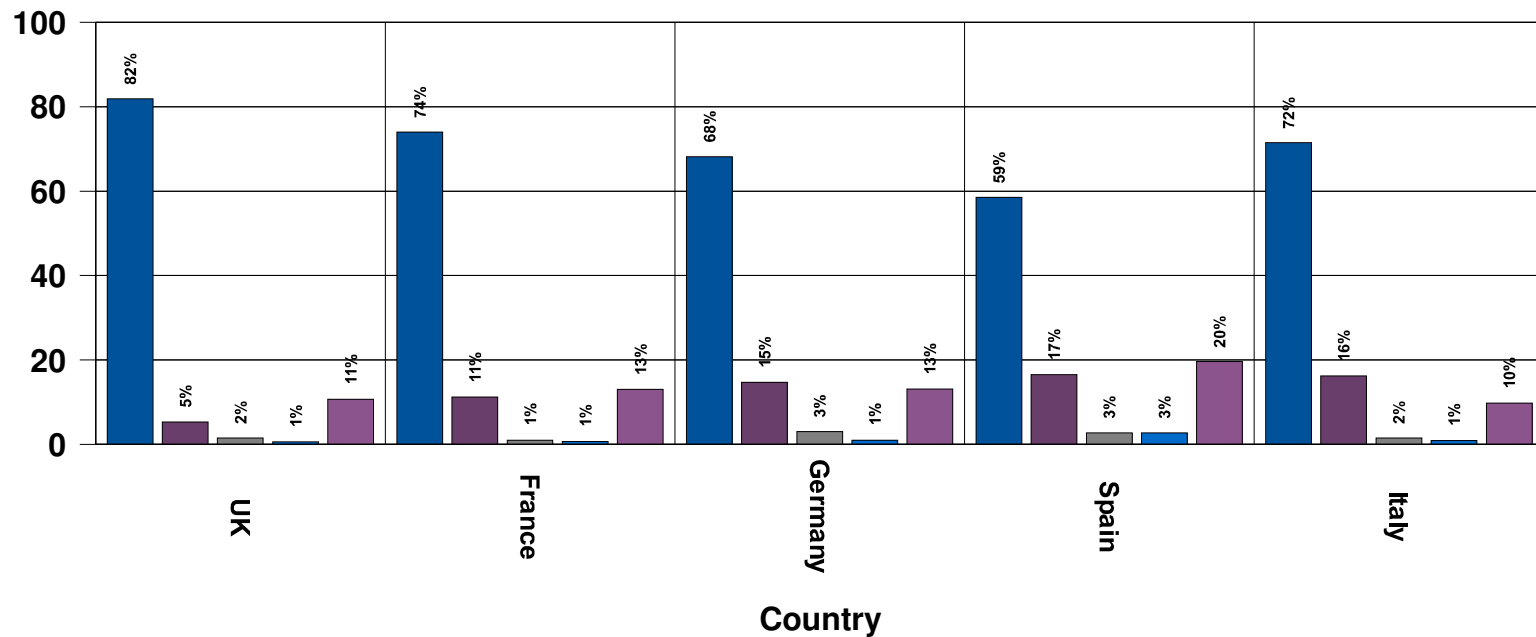
Question Six Cross Tabulation With Country

Which age group of drivers do you perceive to be most likely to be involved in a road traffic accident?

Absolute Break % Respondents	Base	Country				
		UK	France	Germany	Spain	Italy
Base	9485	2149	2009	1944	1757	1626
Q6						
17 - 24 year olds	6763 71.3%	1761 81.9%	1486 74.0%	1326 68.2%	1027 58.5%	1163 71.5%
25 - 34 year olds	1179 12.4%	113 5.3%	226 11.2%	286 14.7%	290 16.5%	264 16.2%
35 - 54 year olds	184 1.9%	33 1.5%	20 1.0%	58 3.0%	48 2.7%	25 1.5%
55 - 64 year olds	109 1.1%	12 0.6%	15 0.7%	20 1.0%	47 2.7%	15 0.9%
65+ year olds	1250 13.2%	230 10.7%	262 13.0%	254 13.1%	345 19.6%	159 9.8%

Question Six Cross Tabulation With Country

Which age group of drivers do you perceive to be most likely to be involved in a road traffic accident?



- 17 - 24 year olds
- 25 - 34 year olds
- 35 - 54 year olds
- 55 - 64 year olds
- 65+ year olds