

EUROPEANS AND RESPONSIBLE DRIVING MARCH 2021

GAME CHANGERS



Technical specifications



SAMPLE

12,400 individuals aged 16 years and over, including at least 1000 individuals in each of the surveyed countries



SURVEY DATE

From 9 to 22 March 2021



METHOD

Online survey.

Representative samples of the population aged 16 years and over in each of the surveyed countries

Quota method: gender, age, interviewee occupation, region and town category

Survey conducted for



This report has been produced in accordance with international standard ISO 20252 "Market, opinion and social research". *This report was proofread by Amandine Lama, account director.*

Countries surveyed

Sample	
Total	12,400 respondents
France	2,400 respondents
Germany	1,000 respondents
Belgium	1,000 respondents
Spain	1,000 respondents
Great Britain	1,000 respondents
Italy	1,000 respondents
Sweden	1,000 respondents
Greece	1,000 respondents
Poland	1,000 respondents
Netherlands	1,000 respondents
Slovakia	1,000 respondents



■ Countries surveyed since 2014

■ Countries surveyed since 2015

■ Countries surveyed since 2016

GAME CHANGERS



ROAD TRAFFIC DEATHS: MAIN CAUSES PERCEIVED

1

Perceived main causes of fatal road accidents in general

2021

CHANGE ON
2020 2019

Most-cited cause in
each country:



Inattention



54% +1 -1



Driving under the influence of
alcohol or narcotics



45% -3 -1



Speeding



45% +1 +1



Drowsiness



6%

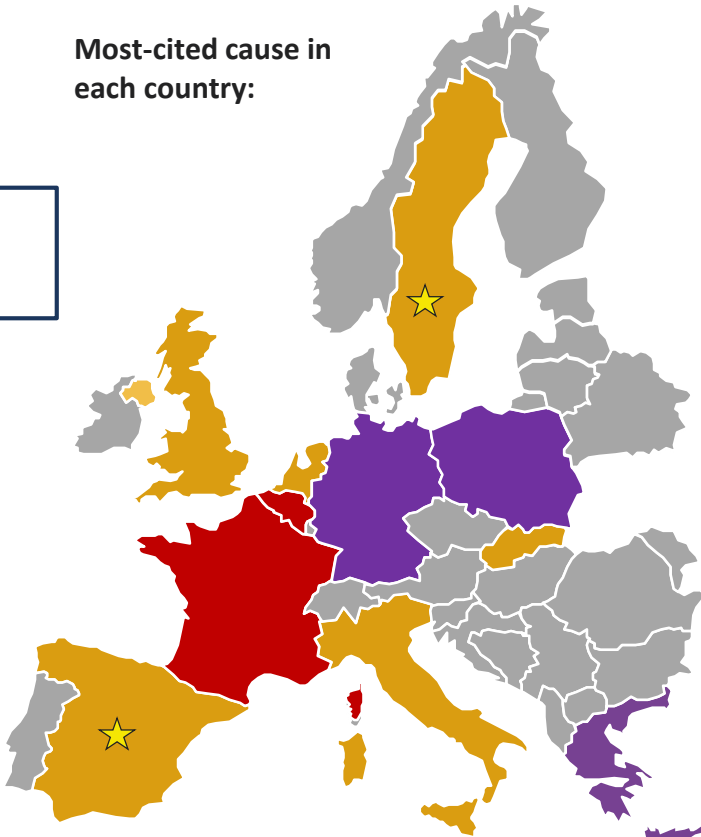
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Base: Total

Total exceeds 100 because several answers are possible

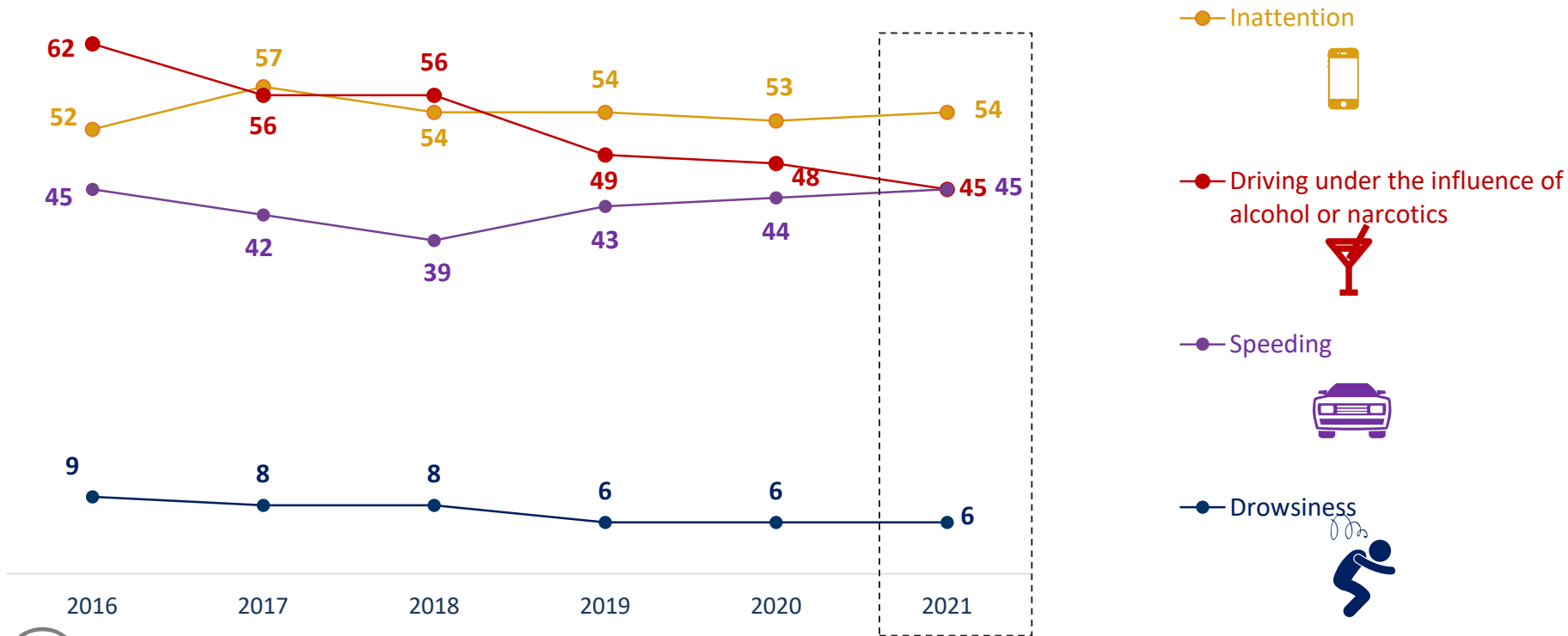


What in your opinion are the principal causes of fatal accidents in your country... ? [Roads in general](#)

★ Number one cause
different to that observed
in 2020



Perceived main causes of fatal road accidents in general



Base: Total

Total exceeds 100 because several answers are possible

What in your opinion are the principal causes of fatal accidents in your country... ? [Roads in general](#)

Perceived main causes of fatal road accidents in general

- BREAKDOWN BY COUNTRY

%	Inattention			Driving under the influence of alcohol or narcotics			Speeding			Drowsiness		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	54	+1	-1	45	-3	-1	45	+1	+1	6	=	=
FRANCE	43	-3	+3	58	-5	-4	40	+4	+1	9	+2	-2
GERMANY	49	+2	-6	27	-7	+3	57	+2	+2	9	+1	-1
BELGIUM	50	+1	+6	53	-3	-1	45	+2	-1	6	-1	+2
SPAIN	56	+3	-7	47	-8	-3	45	+4	+5	4	+1	-1
GB	58	+2	-1	35	+1	-4	47	-1	+2	5	-1	+1
ITALY	71	-1	=	39	-7	-3	39	+7	=	4	+1	-1
SWEDEN	48	+4	-7	46	-2	+3	39	-3	-1	10	+1	-1
GREECE	54	+1	-4	40	-10	+4	56	+1	+3	4	+2	=
POLAND	35	+3	+2	54	-7	+2	66	-3	+1	5	+2	-1
NETHERLANDS	78	-2	=	47	+4	-1	12	-1	-2	8	+1	+2
SLOVAKIA	55	+2	=	45	=	+1	49	+1	-2	4	-2	-1

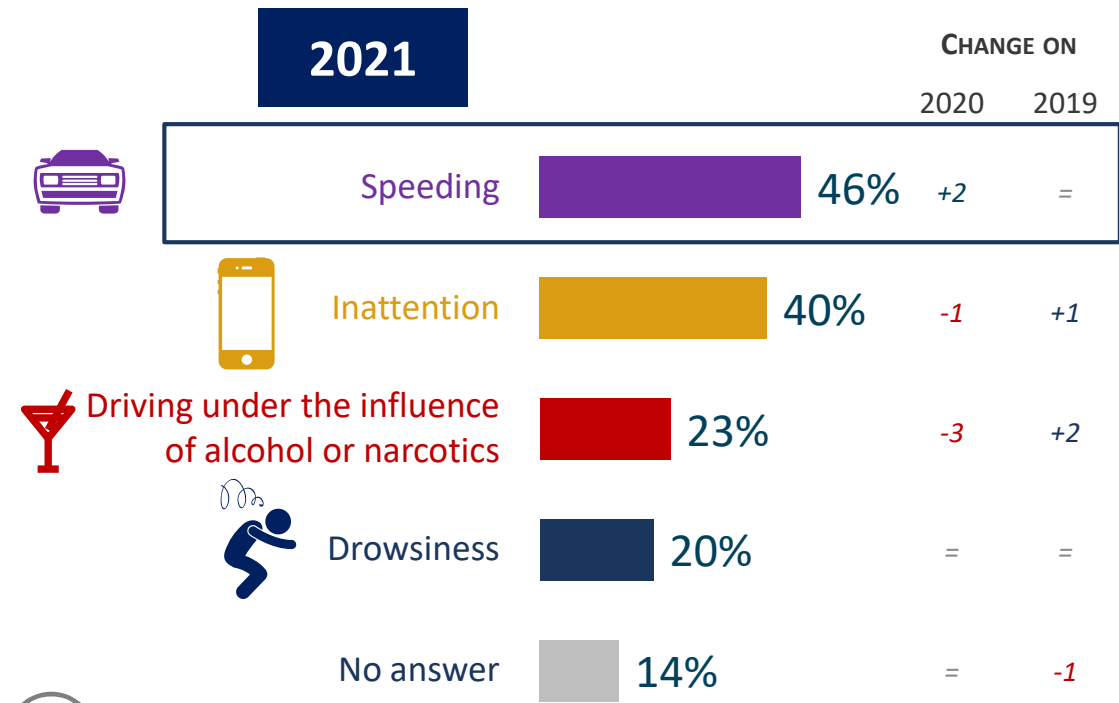


Base: Total

Total exceeds 100 because several answers are possible

What in your opinion are the principal causes of fatal accidents in your country... ? [Roads in general](#)

Perceived main causes of fatal accidents on motorways



Base: Total

Total exceeds 100 because several answers are possible

What in your opinion are the principal causes of fatal accidents in your country... ? [Motorways](#)

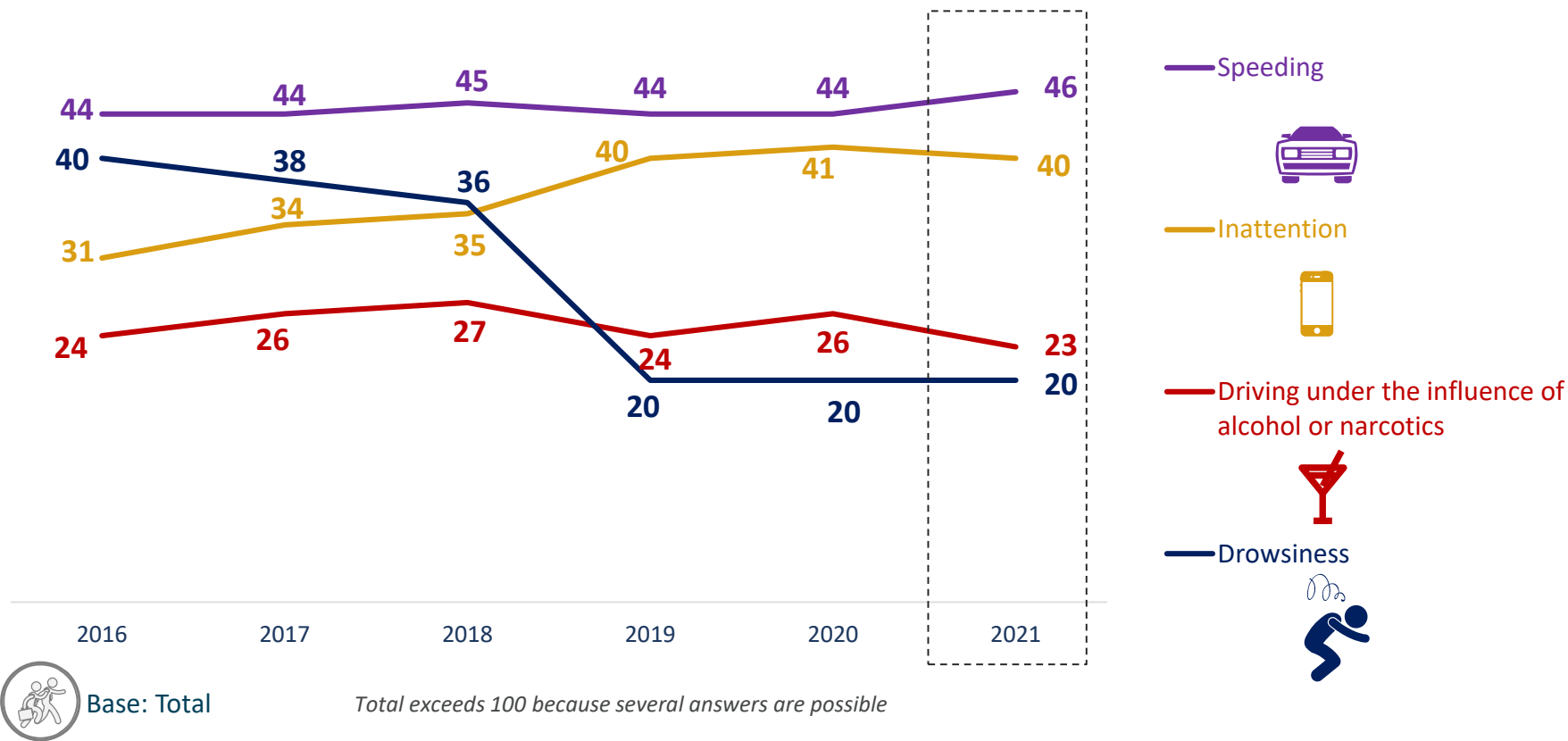
Most-cited cause in each country:



★ Number one cause different to that observed in 2020



Perceived main causes of fatal accidents on motorways



What in your opinion are the principal causes of fatal accidents in your country... ? [Motorways](#)

Perceived main causes of fatal accidents on motorways

- BREAKDOWN BY COUNTRY

%	SPEEDING			INATTENTION			DRIVING UNDER THE INFLUENCE OF ALCOHOL OR NARCOTICS			DROWSINESS		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	46	+2	=	40	-1	+1	23	-3	+2	20	=	=
FRANCE	39	+3	+2	33	-3	+2	27	-3	-2	38	-1	-2
GERMANY	63	+5	=	36	-1	-2	11	-4	+3	26	+2	-2
BELGIUM	46	=	-2	41	+2	+5	35	-1	+4	18	-4	+4
SPAIN	47	+2	+5	46	+2	-1	30	-6	-3	12	+1	-4
GB	44	-2	-1	50	+3	+1	18	+2	=	24	=	+1
ITALY	50	+4	+1	47	-1	+1	18	-4	-1	23	+2	-1
SWEDEN	35	-3	+1	33	=	-2	25	-8	+9	17	+1	-2
GREECE	56	-1	-1	29	-1	-1	23	-2	+1	9	+1	=
POLAND	57	+4	-1	32	=	+4	28	=	+1	22	-1	+3
NETHERLANDS	21	+2	-4	61	-7	+3	31	+1	+3	13	+1	+3
SLOVAKIA	44	+3	-1	35	-6	+2	13	-3	+3	20	=	+1



Base: Total

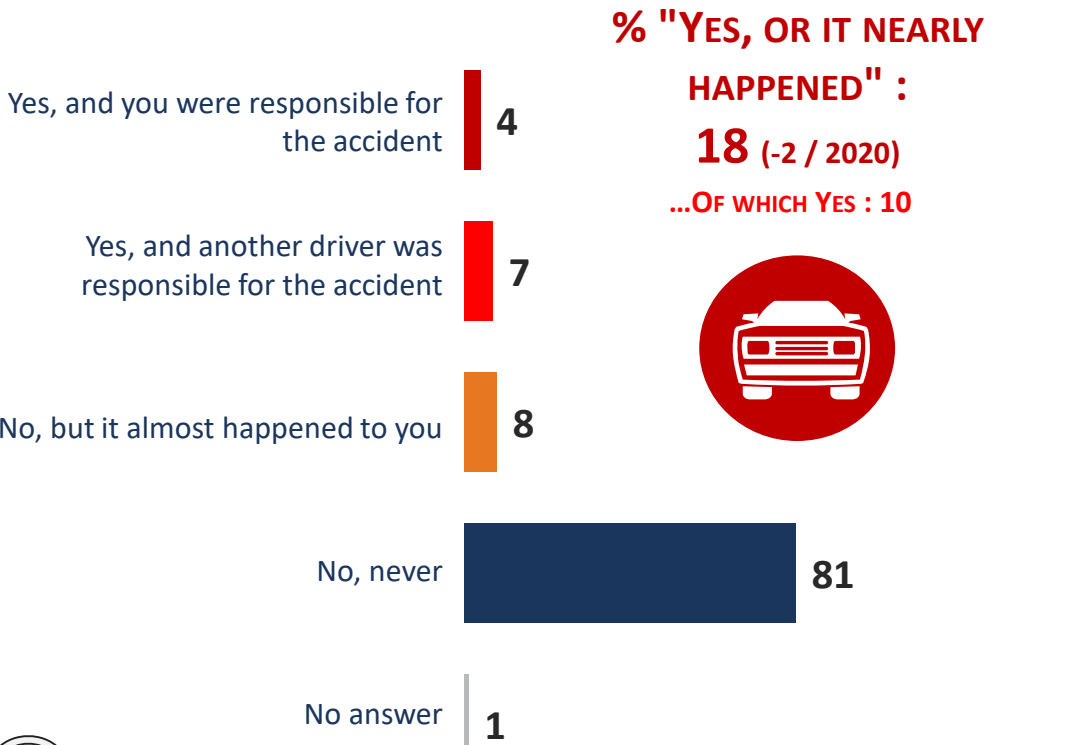
Total exceeds 100 because several answers are possible

What in your opinion are the principal causes of fatal accidents in your country...? [Motorways](#)

EXPERIENCING AN ACCIDENT OR NEAR-ACCIDENT: CAUSAL FACTORS

2

Car accidents caused by speeding or inappropriate speed



BREAKDOWN BY COUNTRY
"YES, OR IT NEARLY HAPPENED"

	2021 %	Change on 2020	Change on 2019
FRANCE	17	-2	+3
GERMANY	16	-2	-1
BELGIUM	16	-3	+1
SPAIN	19	=	+2
GB	18	-5	+4
ITALY	18	=	-3
SWEDEN	18	-5	+1
GREECE	28	-1	=
POLAND	18	-4	+1
NETHERLANDS	12	=	-1
SLOVAKIA	20	+3	=

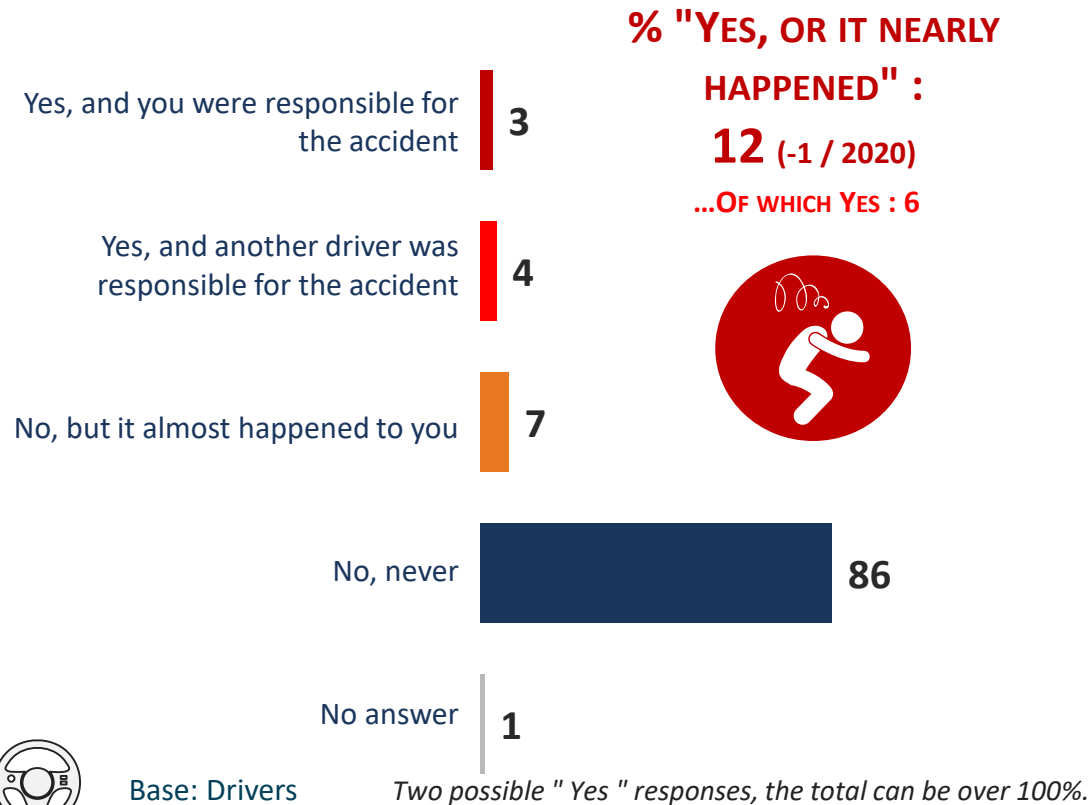


Base: Drivers Two possible "Yes" responses, the total can be over 100%.

Have you ever been in a car accident from excessive or inappropriate speed?



Car accidents occurring due to drowsiness or falling asleep at the wheel

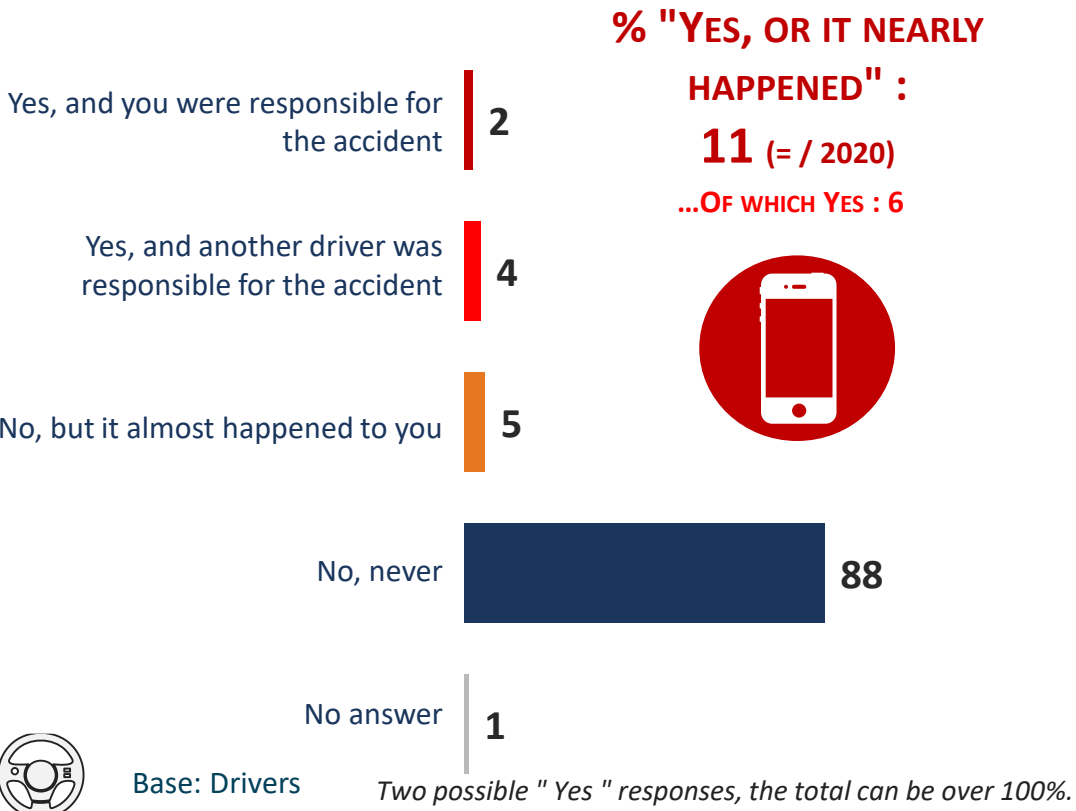


BREAKDOWN BY COUNTRY "YES, OR IT NEARLY HAPPENED"

	2021 %	Change on 2020	Change on 2019
FRANCE	15	-1	+3
GERMANY	11	-1	=
BELGIUM	11	-3	=
SPAIN	14	+1	=
GB	10	=	+1
ITALY	11	-1	-2
SWEDEN	14	-1	+3
GREECE	16	-1	+4
POLAND	11	-2	+1
NETHERLANDS	10	=	=
SLOVAKIA	12	-1	=

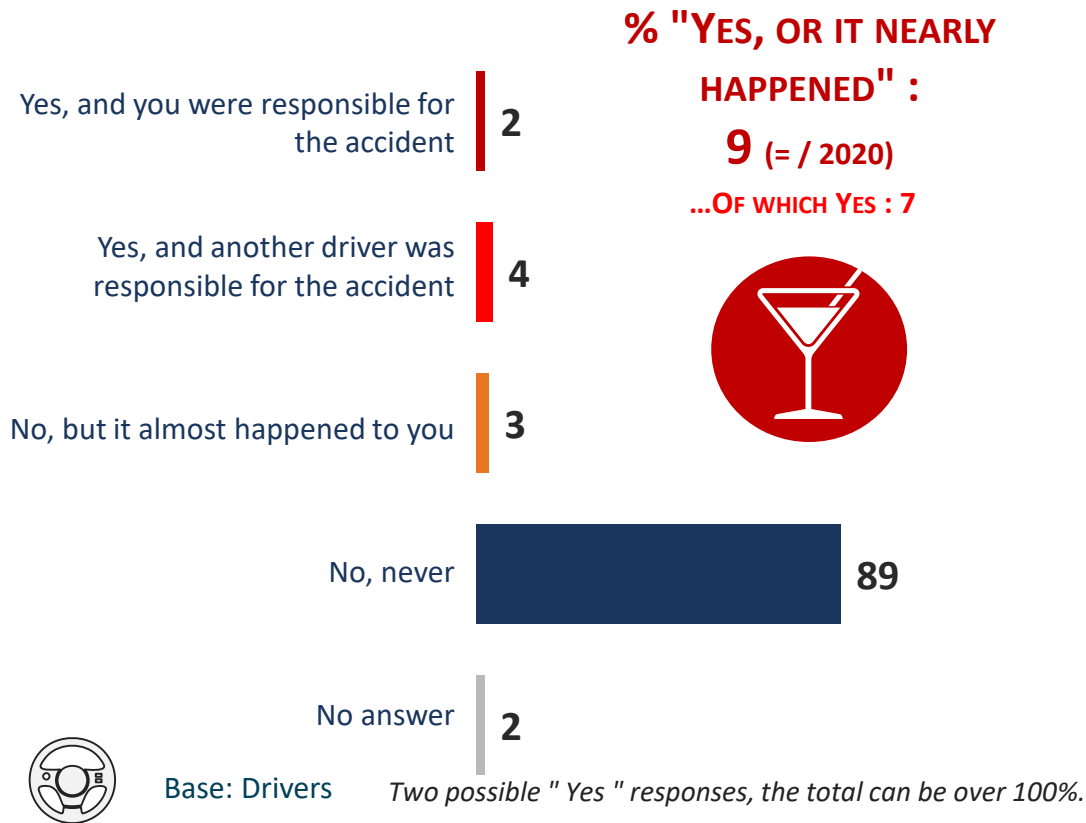


Car accidents occurring due to mobile phone use



BREAKDOWN BY COUNTRY	2021 %	Change on 2020	Change on 2019
"YES, OR IT NEARLY HAPPENED"			
FRANCE	10	=	+1
GERMANY	9	+1	-1
BELGIUM	9	-2	=
SPAIN	9	-2	+1
GB	9	-2	+4
ITALY	11	-1	-2
SWEDEN	14	-1	+3
GREECE	16	=	-1
POLAND	11	+2	-1
NETHERLANDS	8	+1	-1
SLOVAKIA	11	+1	+1

Car accidents occurring due to excessive alcohol consumption



BREAKDOWN BY COUNTRY "YES, OR IT NEARLY HAPPENED"

	2021 %	Change on 2020	Change on 2019
FRANCE	9	-1	+3
GERMANY	10	+2	-1
BELGIUM	11	+1	-1
SPAIN	10	=	=
GB	6	-3	+3
ITALY	8	-1	+1
SWEDEN	8	-1	+3
GREECE	19	+4	+2
POLAND	7	+1	-2
NETHERLANDS	7	=	+2
SLOVAKIA	8	+1	-1

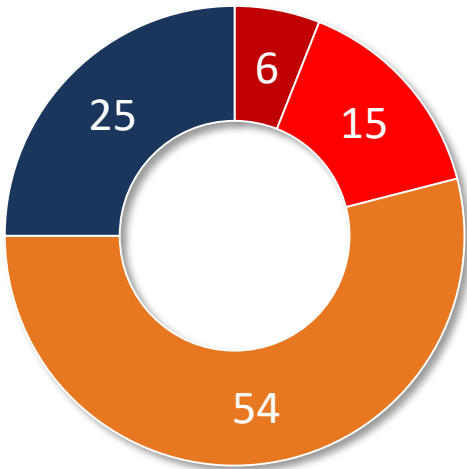


COMPLIANCE WITH THE HIGHWAY CODE, WHAT IS THE PARALLEL WITH COMPLIANCE WITH HEALTH REGULATIONS?

3

Frequency of breaches of the Highway Code

- Frequently
- Occasionally
- Rarely
- Never



%YES : 75

...OF WHICH

% FREQUENTLY/OCCASIONALLY : 21

BREAKDOWN BY COUNTRY		2021
YES		%
	FRANCE	79
	GERMANY	82
	BELGIUM	84
	SPAIN	69
	GB	74
	ITALY	70
	SWEDEN	75
	GREECE	69
	POLAND	75
	NETHERLANDS	82
	SLOVAKIA	68



Base: Drivers

Reasons for breaching the Highway Code



Total over 100, two possible responses



Base: those that responded that they breach the Highway Code (75% of the sample)

What are the two main reasons that best explain why you do not always follow the rules of the Highway Code?

Reasons for breaching the Highway Code - BREAKDOWN BY COUNTRY

%	The rules don't always seem coherent to you, or they're not appropriate for the situation	Some rules are only there so that penalties/fines can be issued	You feel you don't have to because you're particularly vigilant	It's your freedom	You feel you don't have to because you're an experienced driver	You are fatalistic: what will be will be	You feel you don't have to because your vehicle is safer than average
TOTAL	52	29	22	10	9	7	4
FRANCE	60	28	23	8	8	8	3
GERMANY	46	21	11	26	8	6	4
BELGIUM	60	30	20	8	8	7	2
SPAIN	45	36	29	2	7	4	5
GB	56	21	21	4	12	4	3
ITALY	40	38	27	5	7	7	3
SWEDEN	49	17	23	9	12	9	4
GREECE	37	33	33	4	14	5	7
POLAND	66	39	21	5	6	5	5
NETHERLANDS	58	25	18	14	8	6	3
SLOVAKIA	48	29	14	21	8	10	3

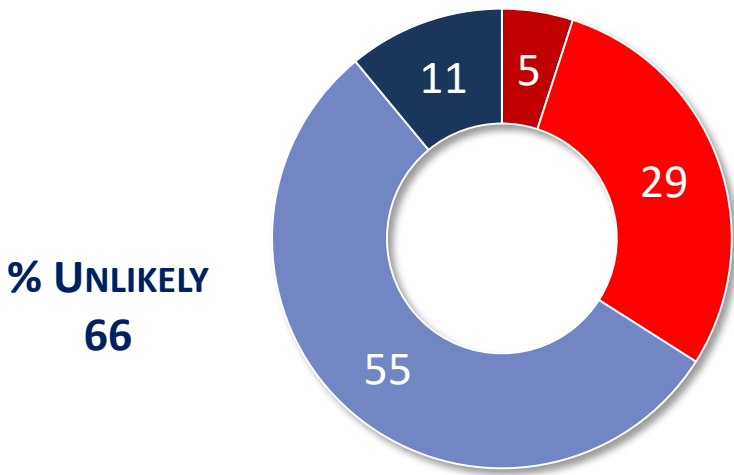


Base: those that responded that they breach the Highway Code (75% of the sample)

What are the two main reasons that best explain why you do not always follow the rules of the Highway Code?

Ability to consider their potential responsibility if there is an accident resulting from their behaviour

- Very likely
- Likely
- Unlikely
- Very unlikely



% LIKELY
34

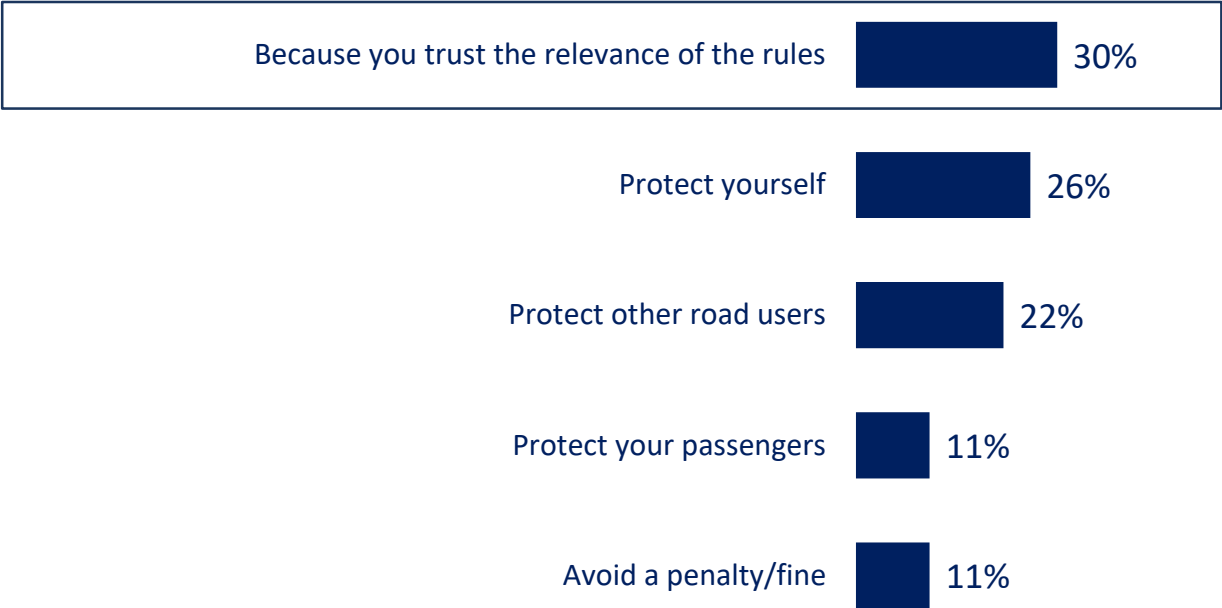
BREAKDOWN BY COUNTRY	
LIKELY	2021 %
FRANCE	52
GERMANY	35
BELGIUM	40
SPAIN	29
GB	23
ITALY	30
SWEDEN	27
GREECE	52
POLAND	22
NETHERLANDS	25
SLOVAKIA	33



Base: Drivers

Think about your usual behaviour when driving a vehicle. If you were to have an accident while driving, how likely is it that you would have been partly responsible for it?

Reasons for respecting the Highway Code



Base: Drivers

When you follow the rules of the Highway Code, above all, is it to...?

Reasons for respecting the Highway Code - BREAKDOWN BY COUNTRY

%	Because you trust the relevance of the rules	Protect yourself	Protect other road users	Protect your passengers	Avoid a penalty/fine
TOTAL	30	26	22	11	11
FRANCE	20	33	15	19	13
GERMANY	34	22	24	5	15
BELGIUM	30	23	15	12	20
SPAIN	40	26	16	9	9
GB	33	23	30	8	6
ITALY	20	40	20	10	10
SWEDEN	33	23	24	11	9
GREECE	26	30	24	15	5
POLAND	15	25	32	14	14
NETHERLANDS	44	23	14	5	14
SLOVAKIA	30	19	29	16	6



Base: Drivers

When you follow the rules of the Highway Code, above all, is it to...?

Breaches of health regulations

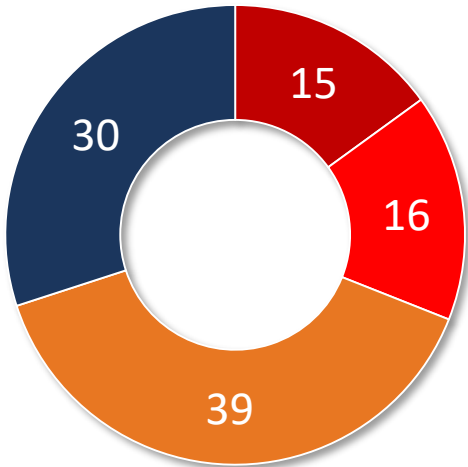
- Frequently
- Occasionally
- Rarely
- Never

% YES 70



OF WHICH
FREQUENTLY/OCCASIONALLY
31%

Comparison
" Highway Code "
75% Yes
(of which 21% Frequently/Occasionally)



BREAKDOWN BY COUNTRY

%YES

	Breaches of health regulations	Comparison Breaches of the Highway Code
FRANCE	68	79
GERMANY	65	82
BELGIUM	70	84
SPAIN	77	69
GB	73	74
ITALY	66	70
SWEDEN	80	75
GREECE	73	69
POLAND	64	75
NETHERLANDS	73	82
SLOVAKIA	67	68

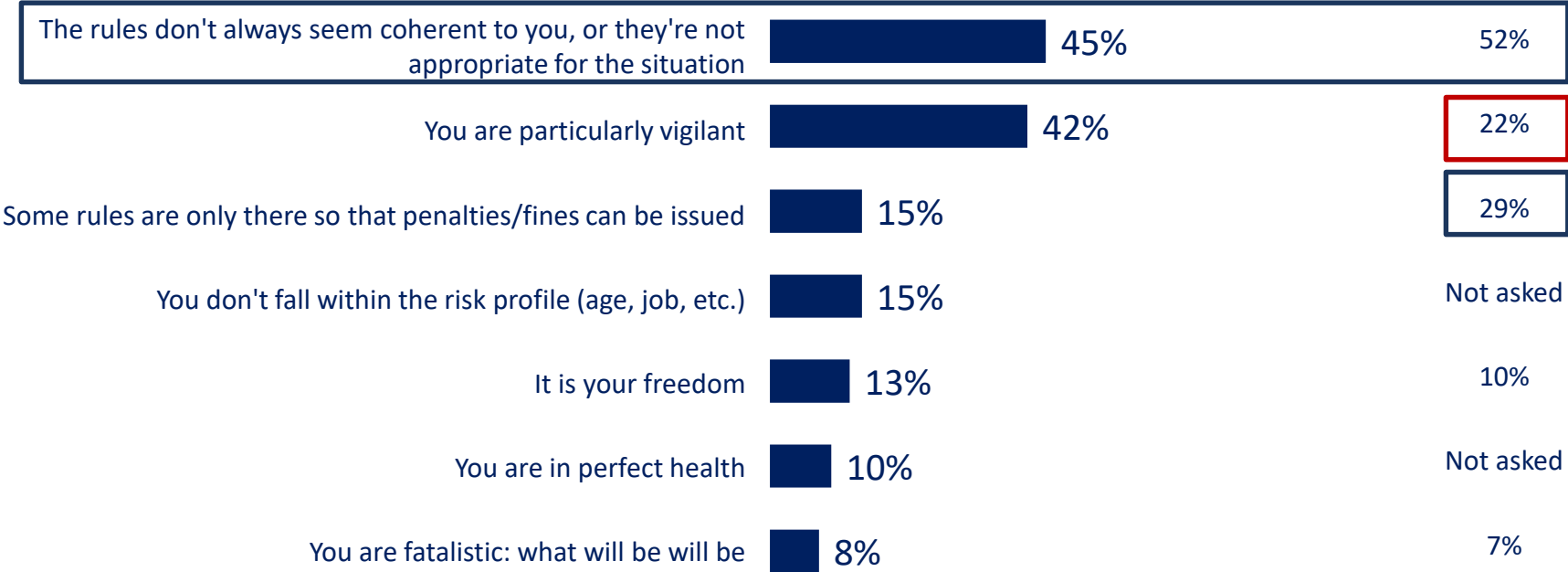


Base: Total

In your daily life, when you think about how you've followed official advice since the start of the epidemic (social distancing, staying at home, or possible curfew etc.), would you say you've strayed at all?

Reasons for breaching health regulations

Comparison
" Highway Code "



Total over 100, two possible responses



Base: those who responded that they do not always respect health regulations (70% of the sample)

What are the two main reasons that best explain why you don't always adhere to the prescribed rules regarding the COVID-19 situation?

Reasons for breaching health regulations - BREAKDOWN BY COUNTRY

%	The rules don't always seem coherent to you, or they're not appropriate for the situation	You are particularly vigilant	Some rules are only there so that penalties/fines can be issued	You don't fall within the risk profile (age, job, etc.)	It is your freedom	You are in perfect health	You are fatalistic: what will be will be
TOTAL	45	42	15	15	13	10	8
FRANCE	48	40	12	13	13	11	13
GERMANY	49	35	12	13	17	9	5
BELGIUM	50	49	12	9	17	7	7
SPAIN	39	55	15	14	3	10	4
GB	48	41	6	14	12	11	7
ITALY	32	52	14	11	10	10	10
SWEDEN	33	48	3	29	12	12	10
GREECE	44	41	29	12	9	11	7
POLAND	53	34	32	15	10	8	11
NETHERLANDS	49	37	9	16	20	13	9
SLOVAKIA	52	24	24	15	18	5	11

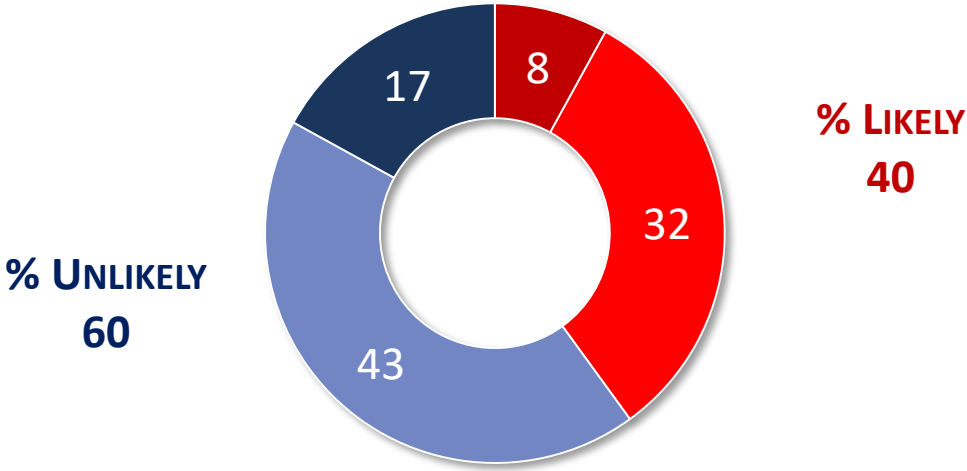


Base: those who responded that they do not always respect health regulations (70% of the sample)

What are the two main reasons that best explain why you don't always adhere to the prescribed rules regarding the COVID-19 situation?

Responsibility potentially shared if COVID-19 is contracted as a result of their behaviour

- Very likely
- Likely
- Unlikely
- Very unlikely



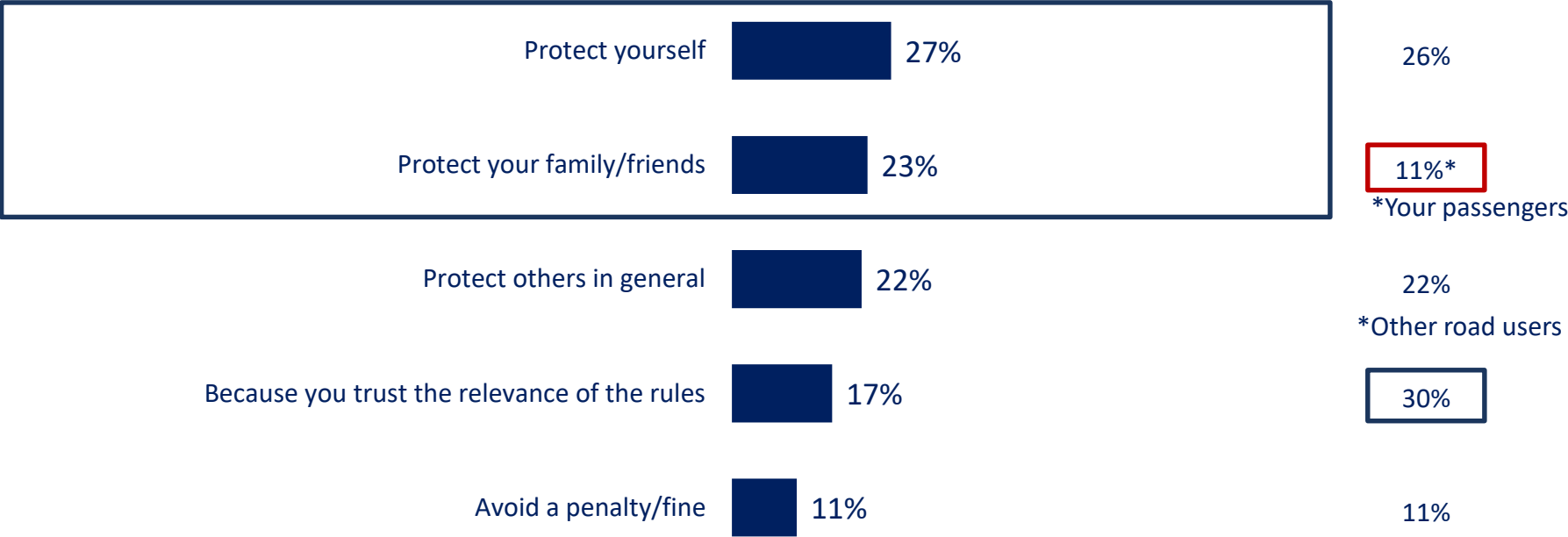
BREAKDOWN BY COUNTRY		2021 %
LIKELY		
FRANCE		49
GERMANY		34
BELGIUM		36
SPAIN		27
GB		36
ITALY		39
SWEDEN		54
GREECE		65
POLAND		29
NETHERLANDS		35
SLOVAKIA		38



Base: Total

Think about your usual behaviour in light of the COVID-19 epidemic. If you were to catch the virus, do you think it likely or unlikely that you would be partly responsible for catching it?

Reasons for respecting health regulations



Base: Total

And when you follow health instructions (wearing a face covering, social distancing, etc.), above all, is it to...?

Reasons for respecting health regulations - BREAKDOWN BY COUNTRY

%	Protect yourself	Protect your family/friends	Protect others in general	Because you trust the relevance of the rules	Avoid a penalty/fine
TOTAL	27	23	22	17	11
FRANCE	28	29	22	10	11
GERMANY	29	15	21	24	11
BELGIUM	22	27	21	19	11
SPAIN	23	26	21	25	5
GB	22	19	31	21	7
ITALY	43	19	16	17	5
SWEDEN	32	21	30	14	3
GREECE	28	25	18	14	15
POLAND	26	26	17	8	23
NETHERLANDS	21	14	28	23	14
SLOVAKIA	23	31	18	16	12

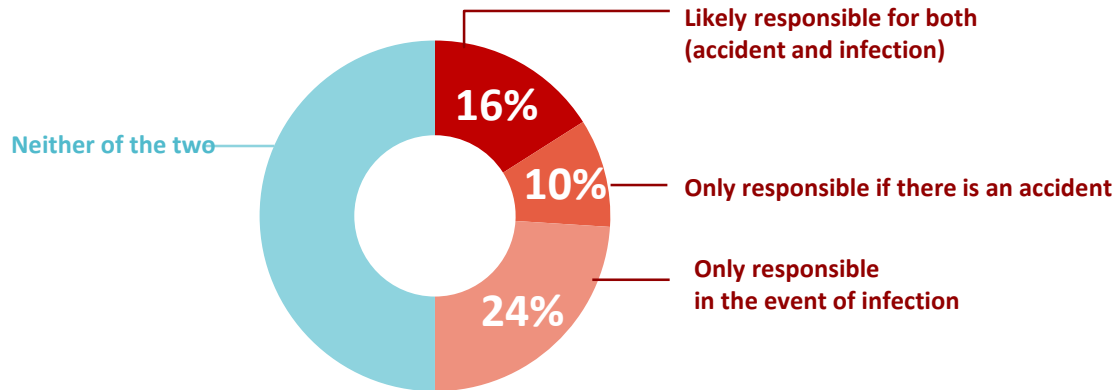


Base: Total

The relationship between responsibility while driving and the responsibility assumed in terms of the risk of infection



Likely responsible



Think about your usual behaviour in light of the COVID-19 epidemic. If you were to catch the virus, do you think it likely or unlikely that you would be partly responsible for catching it?

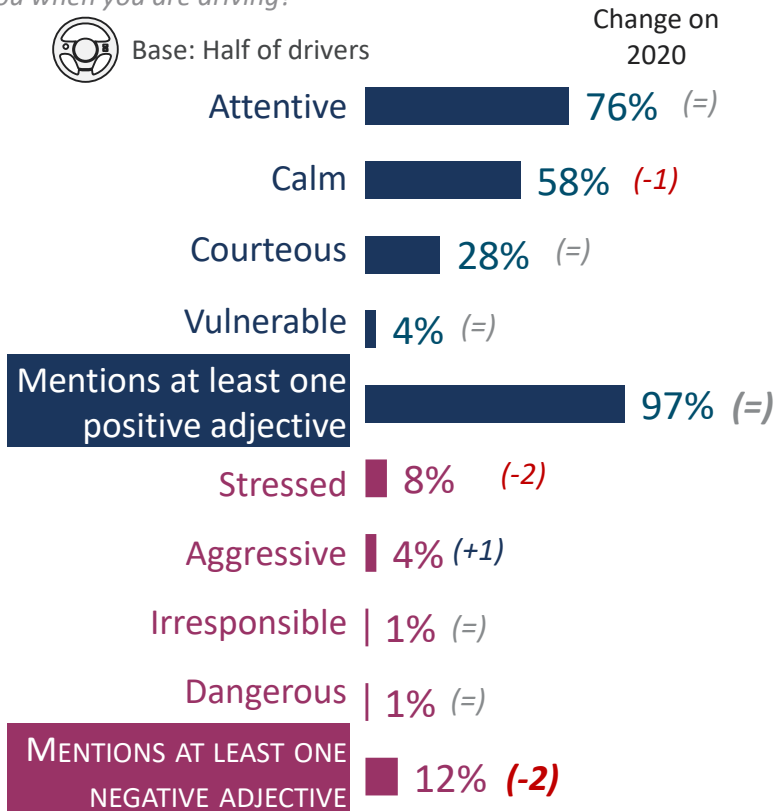
Think about your usual behaviour when driving a vehicle. If you were to have an accident while driving, how likely is it that you would have been partly responsible for it?

EVALUATION OF THE BEHAVIOUR OF DRIVERS

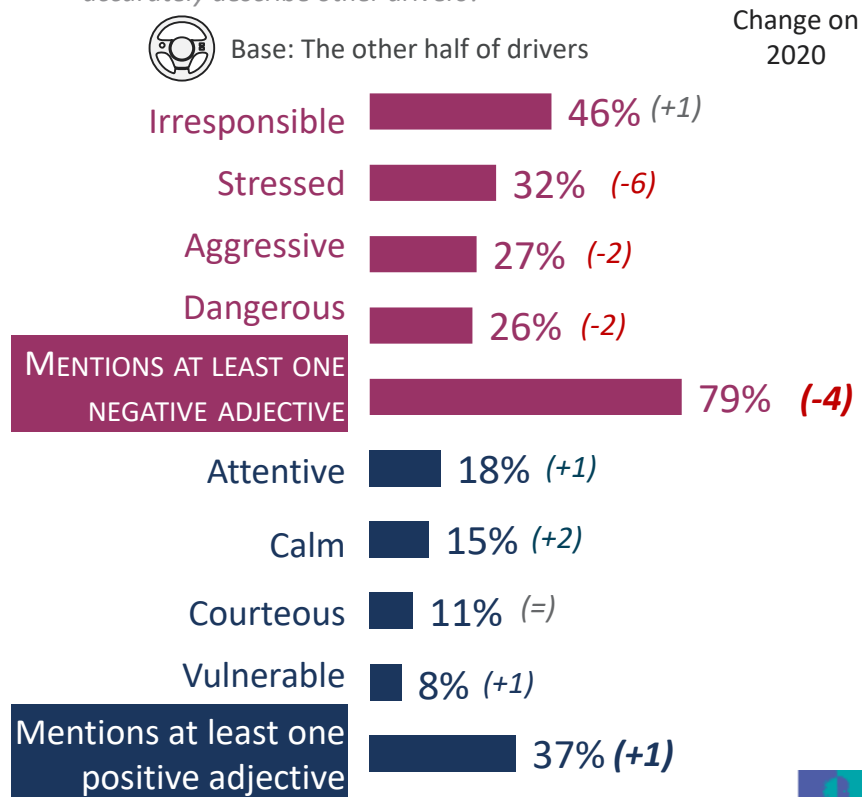
4

The behaviour of Europeans behind the wheel: themselves vs others

Which two adjectives from the following list most accurately relate to you when you are driving?



In your opinion, which two adjectives from the following list most accurately describe other drivers?



Total over 100, two possible responses

GAME CHANGERS



The attitudes of Europeans behind the wheel when they evaluate themselves - BREAKDOWN BY COUNTRY

%	Attentive	Calm	Courteous	Vulnerable	Mentions at least one positive adjective			Stressed	Aggressive	Irresponsible	Dangerous	Mentions at least one negative adjective		
	2021	2021	2021	2021	2021	Change on 2020	Change on 2019	2021	2021	2021	2021	2021	Change on 2020	Change on 2019
TOTAL	76	58	28	4	97	=	=	8	4	1	1	12	-2	=
FRANCE	77	49	29	4	95	-1	=	13	4	1	0	17	-3	+2
GERMANY	83	59	22	1	97	+1	-1	7	3	1	0	10	-4	-2
BELGIUM	76	42	43	7	97	-1	+1	10	6	0	1	16	+1	-6
SPAIN	70	65	20	4	96	-1	+1	6	4	1	1	12	+1	=
GB	72	54	45	4	98	=	=	10	2	1	1	12	-4	-2
ITALY	79	45	20	6	97	+1	+1	11	5	0	0	16	-4	+1
SWEDEN	74	69	26	1	96	-2	=	7	4	1	1	11	=	+1
GREECE	75	56	22	5	96	-2	+2	8	4	3	1	14	-1	=
POLAND	74	69	32	1	99	+1	=	5	1	1	1	8	-1	=
NETHERLANDS	81	68	25	5	99	=	+1	4	4	0	1	8	=	-1
SLOVAKIA	71	61	22	6	98	+1	-1	9	2	0	1	12	=	+1

Base: Half of drivers



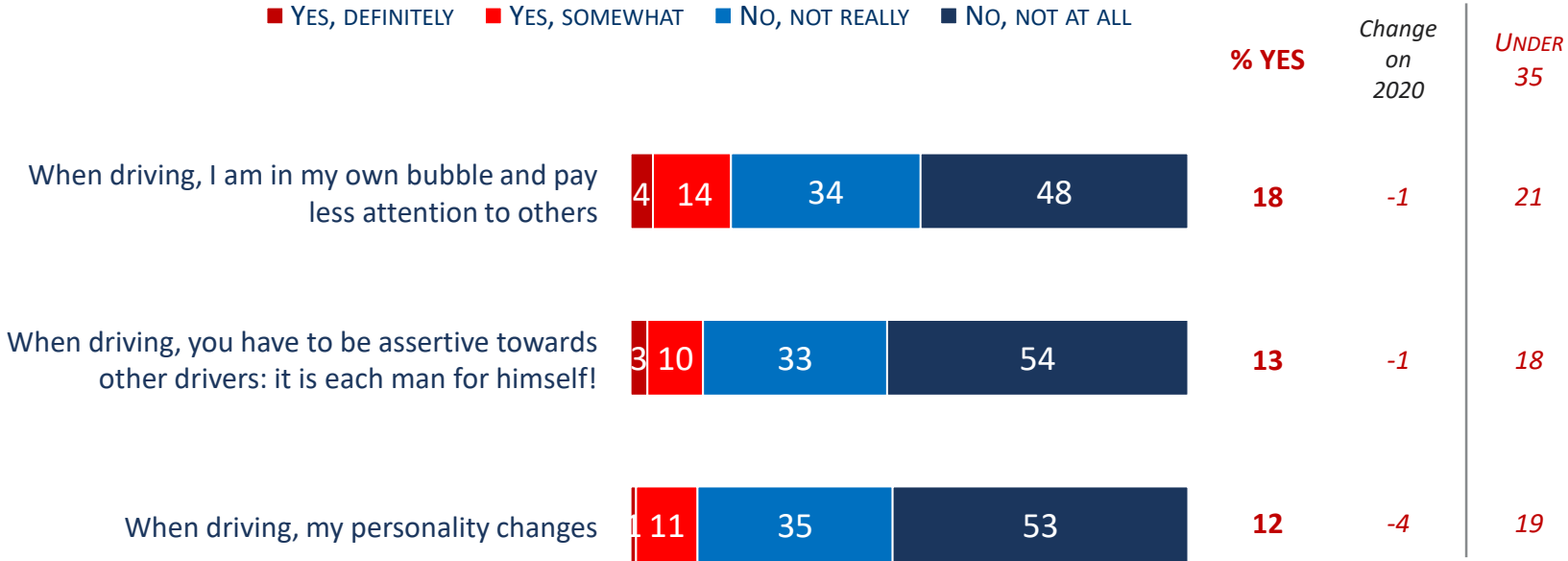
The attitudes of Europeans behind the wheel when they evaluate others - BREAKDOWN BY COUNTRY

	%	Irresponsible Stressed Aggressive Dangerous				Mentions at least one negative adjective			Attentive Calm Courteous Vulnerable				Mentions at least one positive adjective		
		2021	2021	2021	2021	2021	Change on 2020	Change on 2019	2021	2021	2021	2021	2021	Change on 2020	Change on 2019
TOTAL		46	32	27	26	79	-4	+1	18	15	11	8	37	+1	+2
FRANCE		47	26	29	37	83	-6	+4	16	10	9	10	32	+3	-1
GERMANY		30	46	31	12	74	-8	+4	30	19	10	6	45	+8	+1
BELGIUM		35	29	22	26	69	-9	+5	21	21	20	9	48	+5	-2
SPAIN		44	31	25	23	73	-3	+3	21	26	4	9	40	+1	-3
GB		47	16	29	22	71	-7	-3	22	15	28	9	50	+8	+2
ITALY		51	33	24	38	87	-2	+1	13	9	4	5	25	-2	+3
SWEDEN		36	55	17	11	76	+1	-1	21	14	22	5	46	-2	+3
GREECE		56	34	33	40	94	-1	=	7	4	2	4	15	-1	+1
POLAND		61	22	33	33	86	-2	-2	15	13	10	2	29	-4	+6
NETHERLANDS		40	33	25	18	72	-7	+3	25	21	9	17	49	+1	+5
SLOVAKIA		56	23	37	21	85	=	-3	13	13	7	8	33	=	+6

Base: The other half of drivers



Driving behaviour



Base: Drivers

Do you agree with each of the following statements?

Driving behaviour - BREAKDOWN BY COUNTRY

% YES

	When driving, I am in my own bubble and pay less attention to others		When driving, you have to be assertive towards other drivers: it is each man for himself!		When driving, my personality changes	
	2021	Change on 2020	2021	Change on 2020	2021	Change on 2020
TOTAL	18	-1	13	-1	12	-4
FRANCE	15	-2	12	=	16	-4
GERMANY	7	-2	8	-3	9	-3
BELGIUM	20	=	15	+2	18	+1
SPAIN	35	+1	6	=	13	-2
GB	14	-3	20	-7	18	-8
ITALY	13	-3	10	-4	12	-6
SWEDEN	10	=	9	+1	6	-3
GREECE	12	+2	12	+1	10	=
POLAND	15	-6	35	-8	16	-4
NETHERLANDS	9	-1	8	=	7	-3
SLOVAKIA	47	+2	12	+3	10	-5

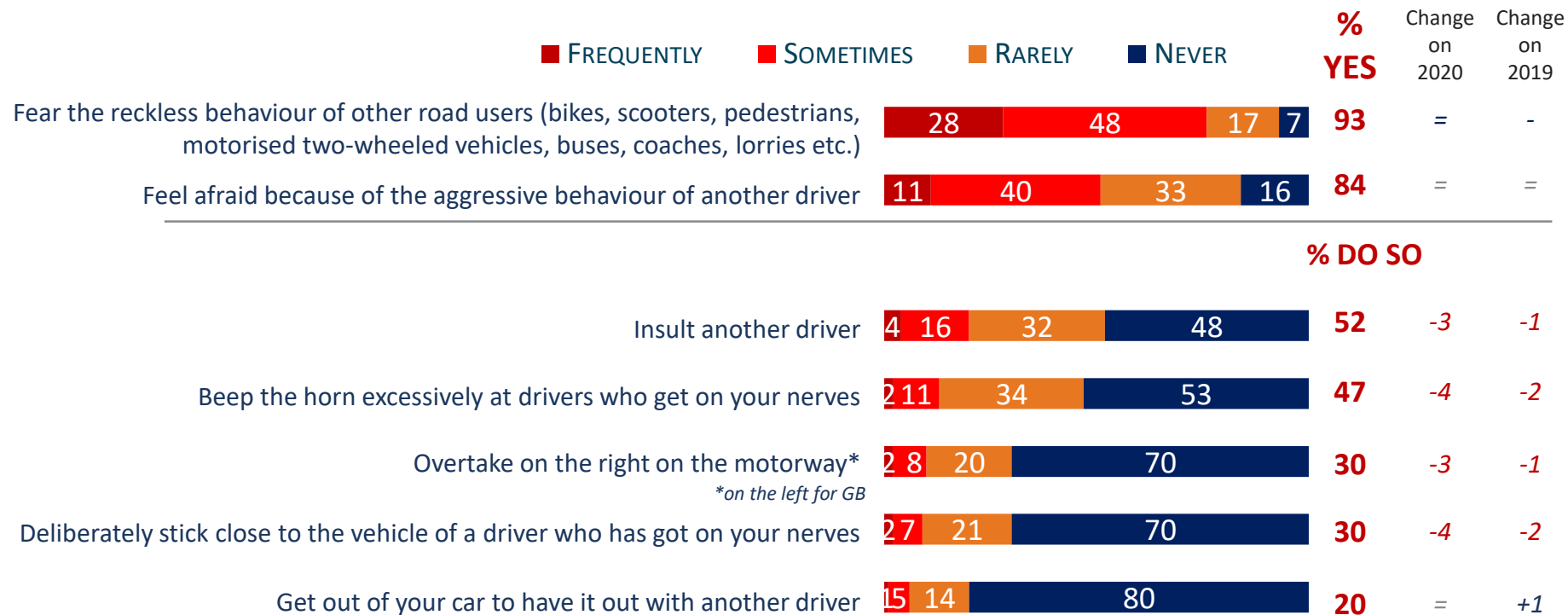


Base: Drivers

CIVIL AND UNCIVIL DRIVING BEHAVIOUR

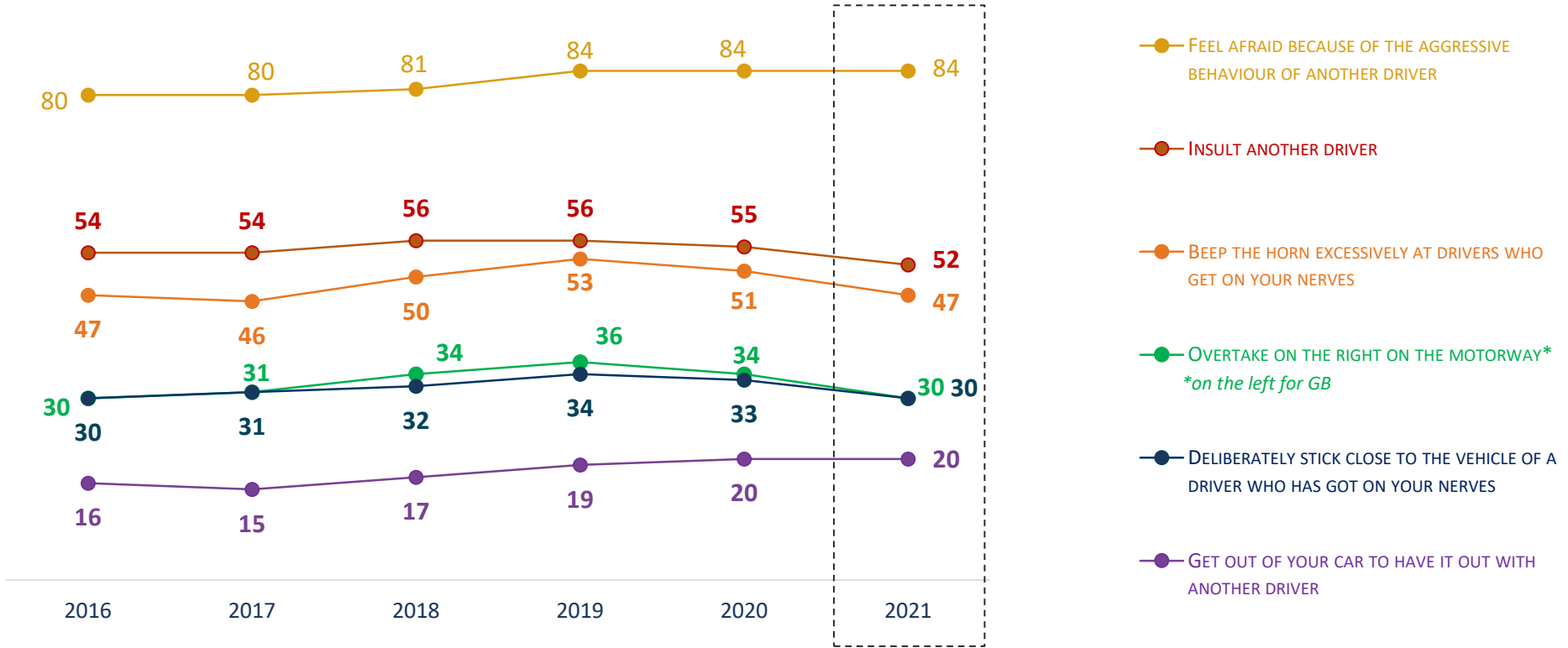
5

Uncivil driving and fear caused by aggressive behaviour



Base: Drivers

Rudeness behind the wheel - % DO SO

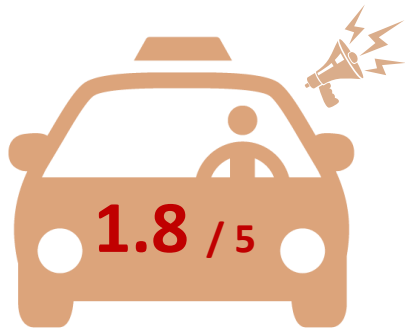


Base: Drivers

Average amount of rude behaviour by country

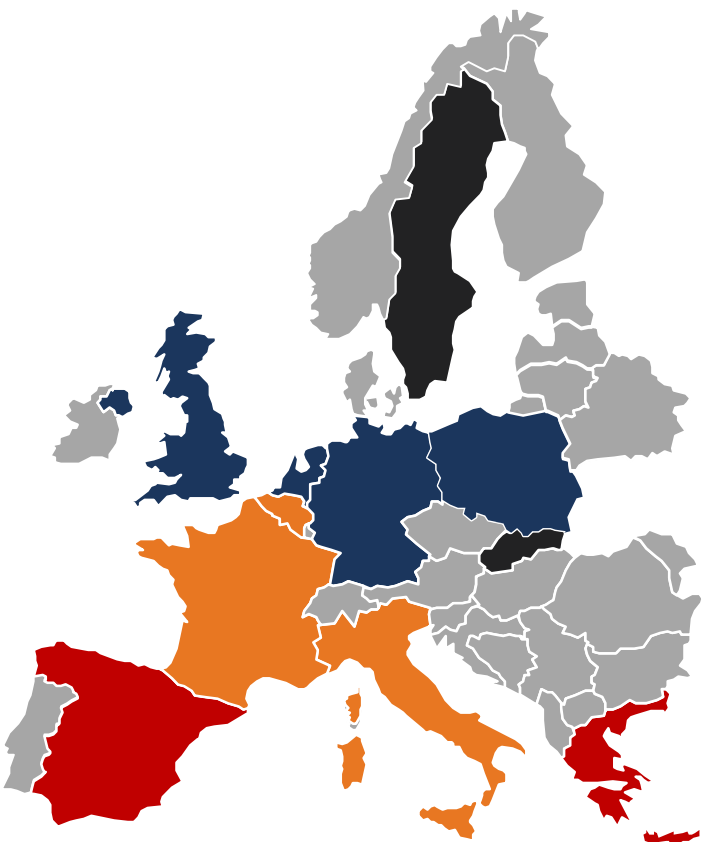
2021

AVERAGE AMOUNT OF RUDE BEHAVIOUR



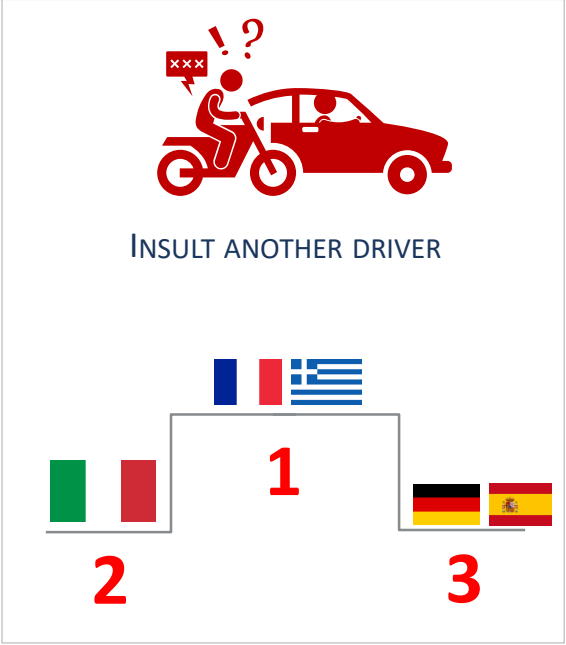
Change on 2020 : -0.1
Change on 2019 : -0.1

			Change on 2020	Change on 2019
FRANCE		2.0	-0.1	-0.1
GERMANY		1.6	-0.2	-0.1
BELGIUM		1.8	-0.2	-0.1
SPAIN		2.1	-0.1	+0.1
GB		1.5	-0.3	=
ITALY		1.9	-0.1	-0.2
SWEDEN		1.5	-0.1	+0.1
GREECE		2.4	=	-0.1
POLAND		1.6	-0.3	=
NETHERLANDS		1.7	-0.1	-0.1
SLOVAKIA		1.5	=	-0.1



Base: Drivers

Rudeness behind the wheel - Top three countries where uncivil behaviour is the highest



Base: Drivers

Rudeness behind the wheel - Top three countries where uncivil behaviour is the highest (continued)



Base: Drivers

Rudeness behind the wheel - BREAKDOWN BY COUNTRY

% DO SO

	Feel afraid because of the aggressive behaviour of another driver			Insult another driver			Beep the horn excessively at drivers who get on your nerves		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	84	=	=	52	-3	-1	47	-4	-2
FRANCE	88	+1	=	65	-5	+1	53	-3	-3
GERMANY	76	-6	+3	57	-6	-2	28	-6	+1
BELGIUM	87	+6	-2	52	-5	-2	52	-5	-6
SPAIN	92	+3	=	57	-1	+1	62	-4	=
GB	84	+2	-1	48	-7	+1	36	-9	+2
ITALY	85	-4	+1	61	=	-4	56	-2	-4
SWEDEN	86	=	+1	35	+1	+2	37	-3	+2
GREECE	91	+4	=	65	-5	-1	60	-1	-2
POLAND	78	-7	+2	36	-4	-1	45	-8	+1
NETHERLANDS	69	+1	-3	49	+1	-2	41	-2	-2
SLOVAKIA	87	+2	+1	39	-3	-1	40	-5	-7



Base: Drivers

42 Do you frequently, sometimes, rarely, or never do the following when you are driving your vehicle?

Rudeness behind the wheel - BREAKDOWN BY COUNTRY (continued)

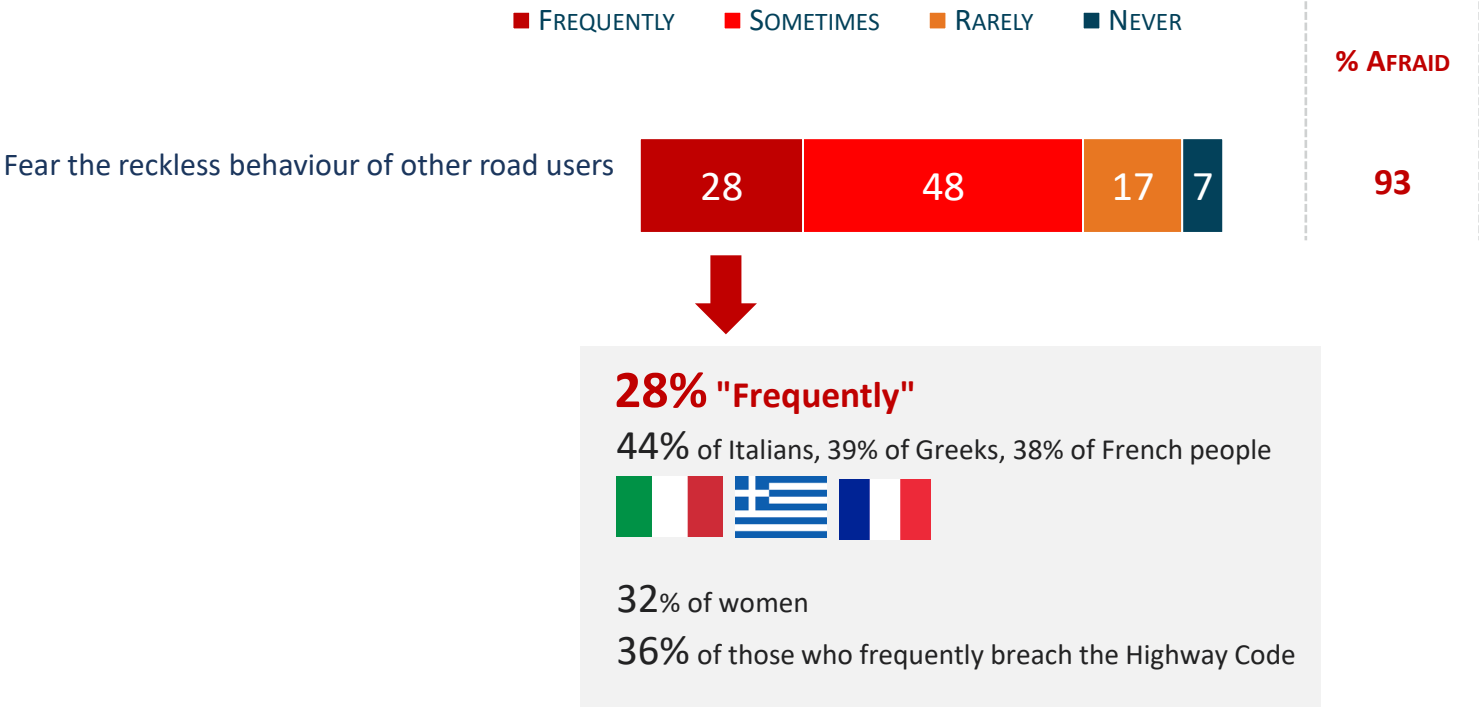
% DO SO

	Overtake on the right on the motorway* *on the left for GB			Deliberately stick close to the vehicle of a driver who has got on your nerves			Get out of your car to have it out with another driver		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	30	-4	-2	30	-3	-1	20	=	+1
FRANCE	26	-1	-4	33	-1	=	19	+1	+2
GERMANY	25	-5	-5	30	-3	-3	17	-2	+2
BELGIUM	34	-3	-5	31	-1	+1	15	+1	-1
SPAIN	41	-3	+3	29	-4	+3	22	+2	+1
GB	33	-8	-1	23	-5	+1	10	-3	+3
ITALY	21	-3	-6	30	-1	-6	21	-5	-1
SWEDEN	28	-5	+2	30	-4	=	17	+1	+3
GREECE	38	-1	=	47	=	-4	29	+6	+1
POLAND	27	-6	-3	24	-2	-2	33	-4	+1
NETHERLANDS	39	-9	-1	26	-7	-3	11	+2	-1
SLOVAKIA	22	+2	=	21	-4	+2	23	+1	+1



Base: Drivers

Fear caused by the reckless behaviour of other road users



Base: Drivers

Do you frequently, sometimes, rarely, or never do the following when you are driving your vehicle?

Fear caused by the reckless behaviour of other road users - BREAKDOWN BY COUNTRY

%

Fear the reckless behaviour of other road users

	YES* 2021	Change on 2020	<i>Of which Frequently</i>	Change on 2020
TOTAL	93	=	28	-1
FRANCE	96	=	38	=
GERMANY	87	-4	13	-4
BELGIUM	93	=	27	+1
SPAIN	96	+3	37	+1
GB	93	+1	20	-1
ITALY	96	-1	45	+6
SWEDEN	94	-2	25	-1
GREECE	97	-1	39	-5
POLAND	91	-5	26	-12
NETHERLANDS	84	-1	12	=
SLOVAKIA	91	+1	17	-5



Base: Drivers

*Frequently + Sometimes + Rarely

45 Do you frequently, sometimes, rarely, or never do the following when you are driving your vehicle?

The feeling of well-being created by small acts of kindness

AVERAGE SCORES OUT OF 10



YOU LET ANOTHER CAR GO AND THE DRIVER
SIGNALS TO SAY THANK YOU

8.3 (+0.4)

*8.6/10 for those aged
65 years and older*

YOU ARE IN THE CAR AND ANOTHER DRIVER
POLITELY GESTURES FOR YOU TO GO

8.2 (+0.4)

*8.5/10 for those aged
65 years and older*



SOMEONE APOLOGISES FOR A MISTAKE BY
WAVING AT YOU

7.8 (+0.4)

8.2/10 for those aged 65 years and older



Base: Drivers

What is your level of well-being when you encounter each of these situations while driving...

The feeling of well-being created by small acts of kindness - BREAKDOWN BY COUNTRY

AVERAGE SCORES OUT OF 10

*You let another car go and the
driver signals to say thank you*

*You are in the car and another
driver politely gestures for you to
go*

*Someone apologises for a mistake
by waving at you*

	2021	Change on 2020	2021	Change on 2020	2021	Change on 2020
TOTAL	8.3	+0.4	8.2	+0.4	7.8	+0.4
FRANCE	8.2	+0.3	8.3	+0.4	7.8	+0.4
GERMANY	8.2	+0.3	7.9	+0.2	7.4	+0.2
BELGIUM	8.4	+0.3	8.3	+0.3	7.9	+0.5
SPAIN	8.5	+0.5	8.4	+0.4	8.1	+0.4
GB	8.3	+0.4	8.1	+0.4	7.6	+0.3
ITALY	8.2	+0.5	8.2	+0.4	7.9	+0.5
SWEDEN	7.7	+0.5	7.5	+0.5	7.4	+0.5
GREECE	8.7	+0.3	8.8	+0.3	8.5	+0.3
POLAND	8.2	+0.6	8.0	+0.8	7.5	+1.0
NETHERLANDS	8.3	+0.6	8.2	+0.7	7.9	+0.8
SLOVAKIA	8.7	+0.6	8.4	+0.4	8.2	+0.4



Base: Drivers

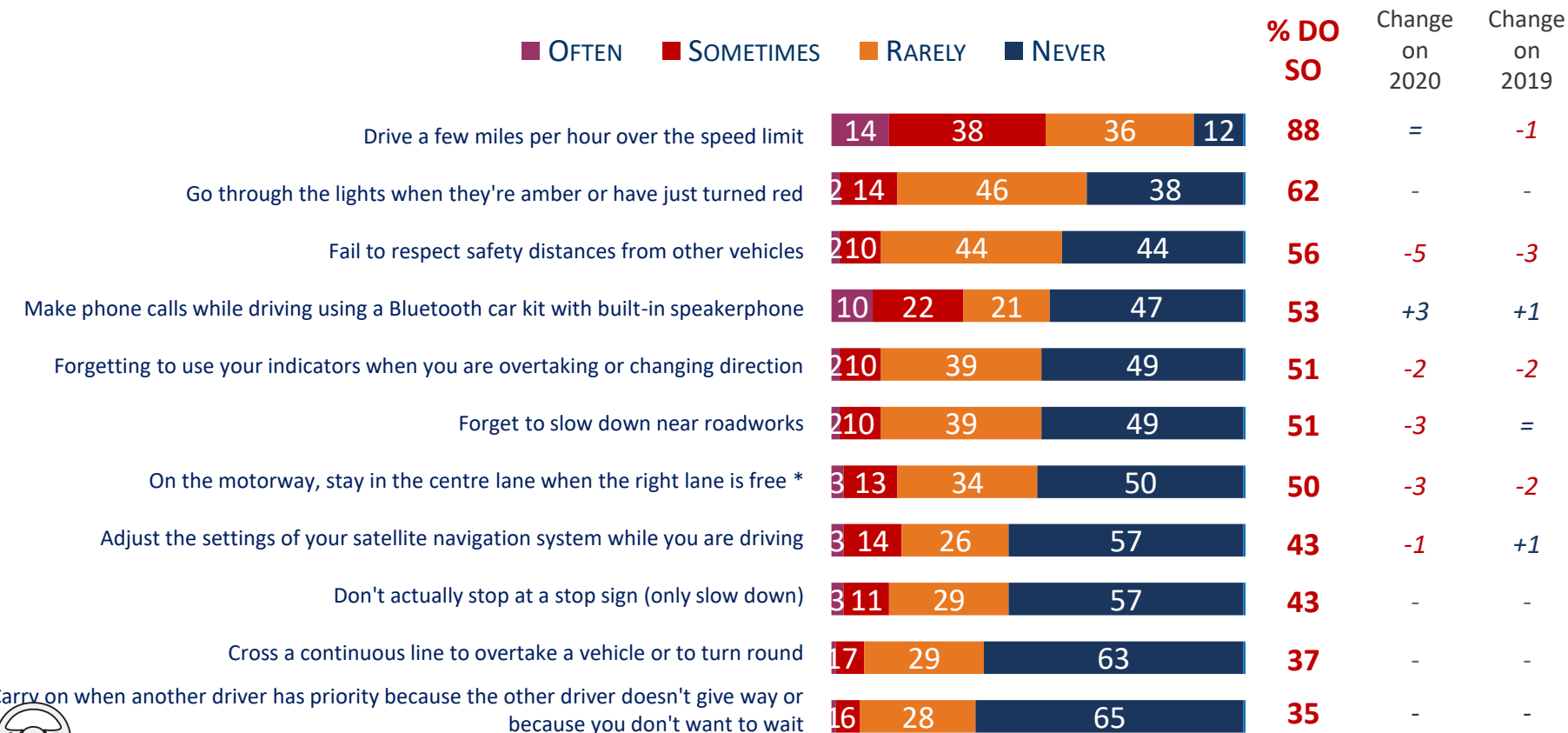
What is your level of well-being when you encounter each of these situations while driving...



DANGEROUS BEHAVIOUR

6

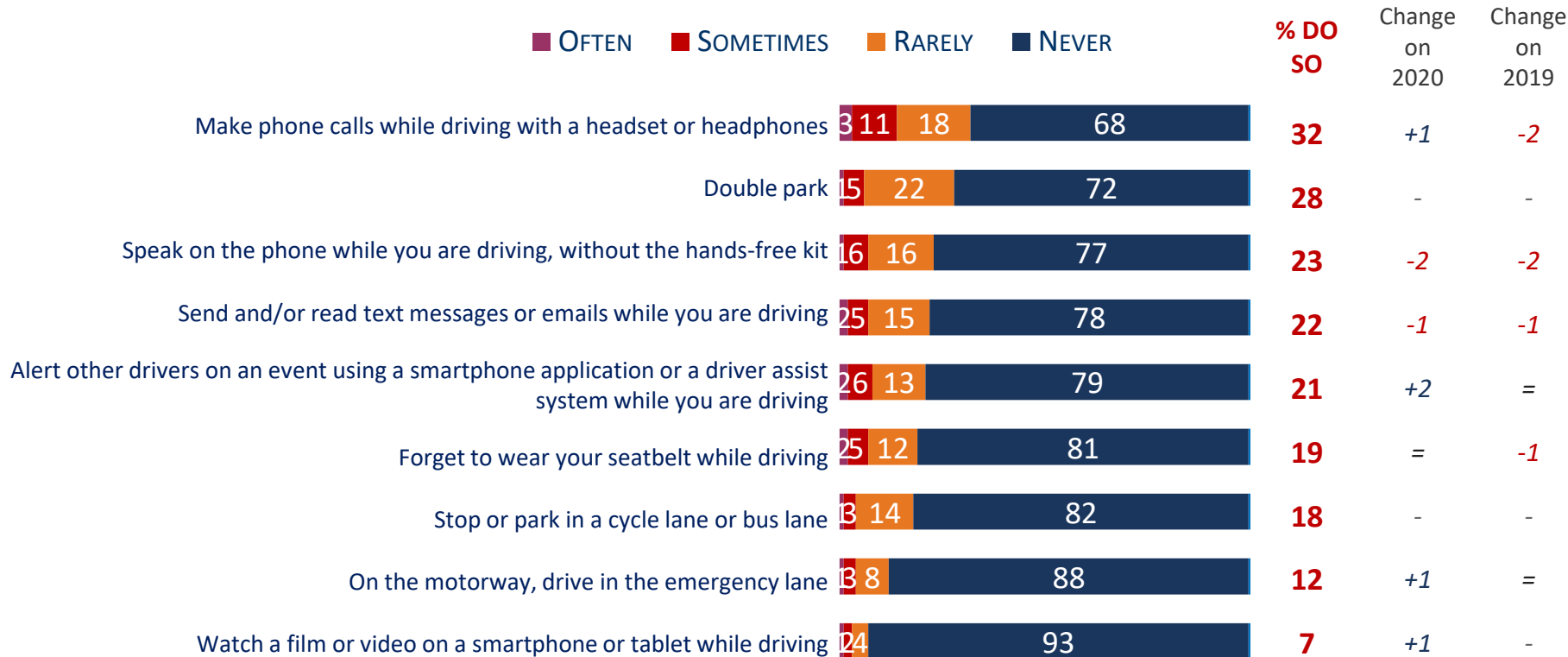
Prevalence of dangerous habits (1/2)



Base: Drivers

*left lane for GB

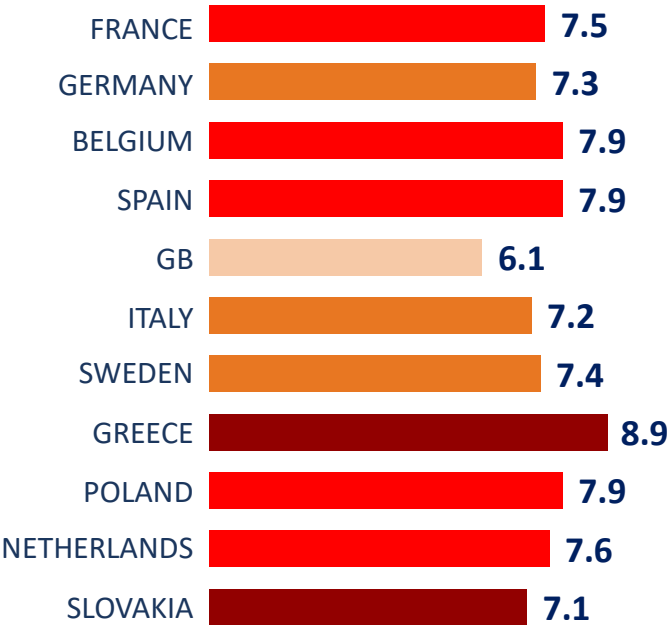
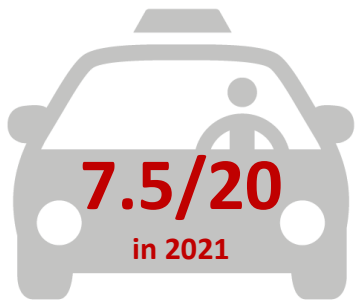
Prevalence of dangerous habits (2/2)



Base: Drivers

Average number of dangerous behaviours

AVERAGE NUMBER OF DANGEROUS BEHAVIOURS*



*often/sometimes/rarely adopted



Base: Drivers

Do you ever do the following when you are driving?

Prevalence of dangerous behaviour - BREAKDOWN BY COUNTRY

% DO SO

	Drive a few miles per hour over the speed limit		Go through the lights when they're amber or have just turned red		Fail to respect safety distances from other vehicles		Make phone calls while driving using a Bluetooth car kit with built-in speakerphone		Forgetting to use your indicators when you are overtaking or changing direction	
	2021	Change on 2020	2021 (New item)		2021	Change on 2020	2021	Change on 2020	2021	Change on 2020
TOTAL	88	=	62		56	-5	53	+3	51	-2
FRANCE	91	=	65		70	-2	54	+6	57	=
GERMANY	90	+1	60		64	-4	47	-2	53	-3
BELGIUM	90	-1	62		60	=	55	+2	50	-6
SPAIN	84	+1	69		51	-4	53	+8	53	-1
GB	87	-2	59		44	-12	45	+4	52	-2
ITALY	86	+2	50		53	-6	57	+5	48	-2
SWEDEN	90	-2	64		64	-10	56	+6	57	=
GREECE	86	=	67		55	-8	57	-5	42	-7
POLAND	87	-2	59		49	-1	54	-1	46	=
NETHERLANDS	91	=	72		54	-4	53	+3	55	-4
SLOVAKIA	83	+1	51		52	-3	54	+8	46	=



Base: Drivers

Do you ever do the following when you are driving?

Prevalence of dangerous behaviour - BREAKDOWN BY COUNTRY

% DO SO

	Forget to slow down near roadworks		On the motorway, stay in the centre lane when the right lane is free *		Adjust the settings of your satellite navigation system while you are driving		Don't actually stop at a stop sign (only slow down)	Cross a continuous line to overtake a vehicle or to turn round
	2021	Change on 2020	2021	Change on 2020	2021	Change on 2020	2021 (New item)	2021 (New item)
TOTAL	51	-3	50	-3	43	-1	43	37
FRANCE	53	-2	46	-2	44	+3	46	31
GERMANY	54	-3	50	-4	45	-9	58	43
BELGIUM	67	+1	49	-3	55	+2	61	35
SPAIN	57	+4	58	+1	29	=	43	31
GB	47	-6	48	-5	43	-2	33	23
ITALY	47	-3	50	-2	31	-2	40	44
SWEDEN	38	-8	45	-4	40	+1	28	37
GREECE	42	-7	70	-3	45	-2	37	54
POLAND	47	-1	40	-7	51	-5	45	49
NETHERLANDS	58	-3	56	-3	50	=	57	25
SLOVAKIA	49	-4	40	+1	39	-1	25	38



Base: Drivers

Do you ever do the following when you are driving?

*left lane for GB

Prevalence of dangerous behaviour - BREAKDOWN BY COUNTRY

% DO SO

	Carry on when another driver has priority because the other driver doesn't give way or because you don't want to wait	Make phone calls while driving with a headset or headphones	Double park	Speak on the phone while you are driving, without the hands-free kit	Send and/or read text messages or emails while you are driving
	2021 (New item)	2021 Change on 2020	2021 (New item)	2021 Change on 2020	2021 Change on 2020
TOTAL	35	32 +1	28	23 -2	22 -1
FRANCE	46	17 +1	25	17 =	27 =
GERMANY	32	15 -4	21	15 -3	17 -4
BELGIUM	49	18 -1	23	17 -3	26 -2
SPAIN	39	46 +6	61	19 +2	19 +5
GB	29	15 -1	15	11 -1	12 -1
ITALY	29	42 +1	31	21 -1	27 +3
SWEDEN	33	45 =	16	28 -1	22 -1
GREECE	32	53 -1	45	42 -5	27 -1
POLAND	31	39 =	23	39 -2	30 +3
NETHERLANDS	40	29 =	20	17 -1	18 -3
SLOVAKIA	25	32 +6	33	32 -3	21 +1



Base: Drivers

Prevalence of dangerous behaviour - BREAKDOWN BY COUNTRY

% DO SO

	Alert other drivers on an event using a smartphone application or a driver assist system while you are driving		Forget to wear your seatbelt while driving		Stop or park in a cycle lane or bus lane	On the motorway, drive in the emergency lane		Watch a film or video on a smartphone or tablet while driving	
	2021	Change on 2020	2021	Change on 2020	2021 (New item)	2021	Change on 2020	2021	Change on 2020
TOTAL	21	+2	19	=	18	12	+1	7	+1
FRANCE	27	+3	11	+1	13	6	+2	5	=
GERMANY	14	+1	13	-2	22	11	+2	7	+2
BELGIUM	20	+1	12	-3	23	8	+1	6	+2
SPAIN	19	+4	12	+2	26	11	+4	7	+2
GB	13	+1	10	=	11	5	-2	5	=
ITALY	19	=	24	+1	14	7	-1	5	-1
SWEDEN	18	+1	15	+1	16	20	-1	9	+1
GREECE	35	+11	44	+1	21	27	+3	11	+4
POLAND	32	-1	26	-2	18	16	+1	10	+1
NETHERLANDS	11	=	17	=	25	7	-1	6	=
SLOVAKIA	30	+5	30	=	15	12	-2	5	=



Base: Drivers

Do you ever do the following when you are driving?

European drivers' score report



COULD DO
BETTER...

ON AVERAGE*

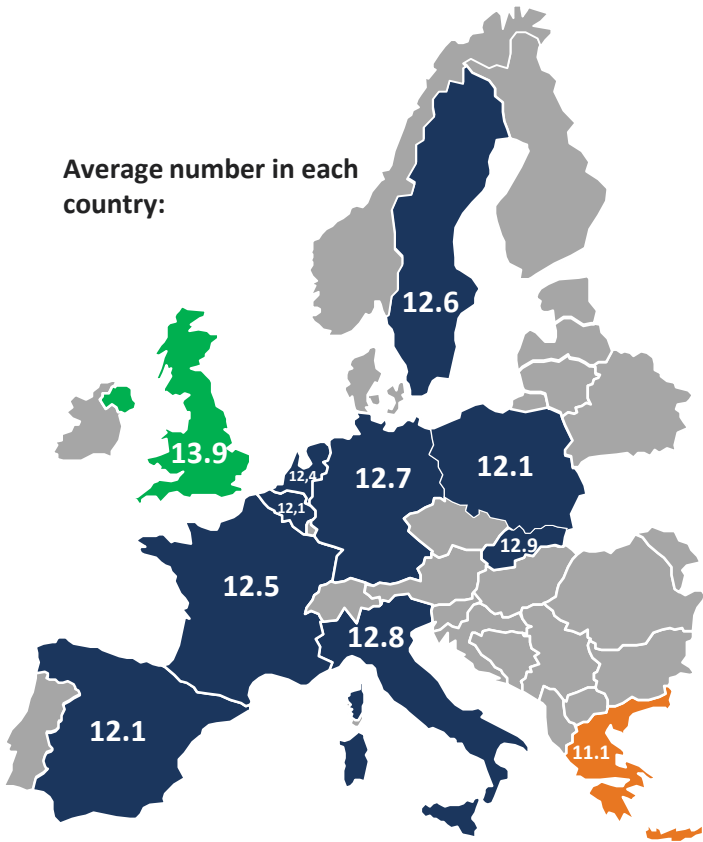


12.5/20

FAIR PASS



Average number in each
country:



Base : Drivers

Do you ever do the following when you are driving?

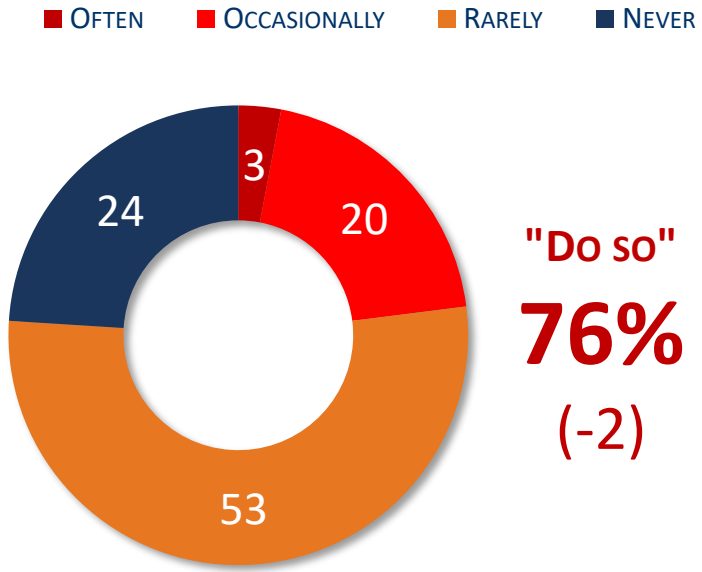
**Note: to obtain the score out of 20, Ipsos gave 1 point for every bad practice the driver had "never" done. If they had done it, they scored a 0 for it.*

INATTENTIVENESS AND RISKY HABITS

(ALCOHOL, DRUGS, MEDICINE AND LACK OF SLEEP)

7

Frequency at which drivers take their eyes off the road for longer than two seconds



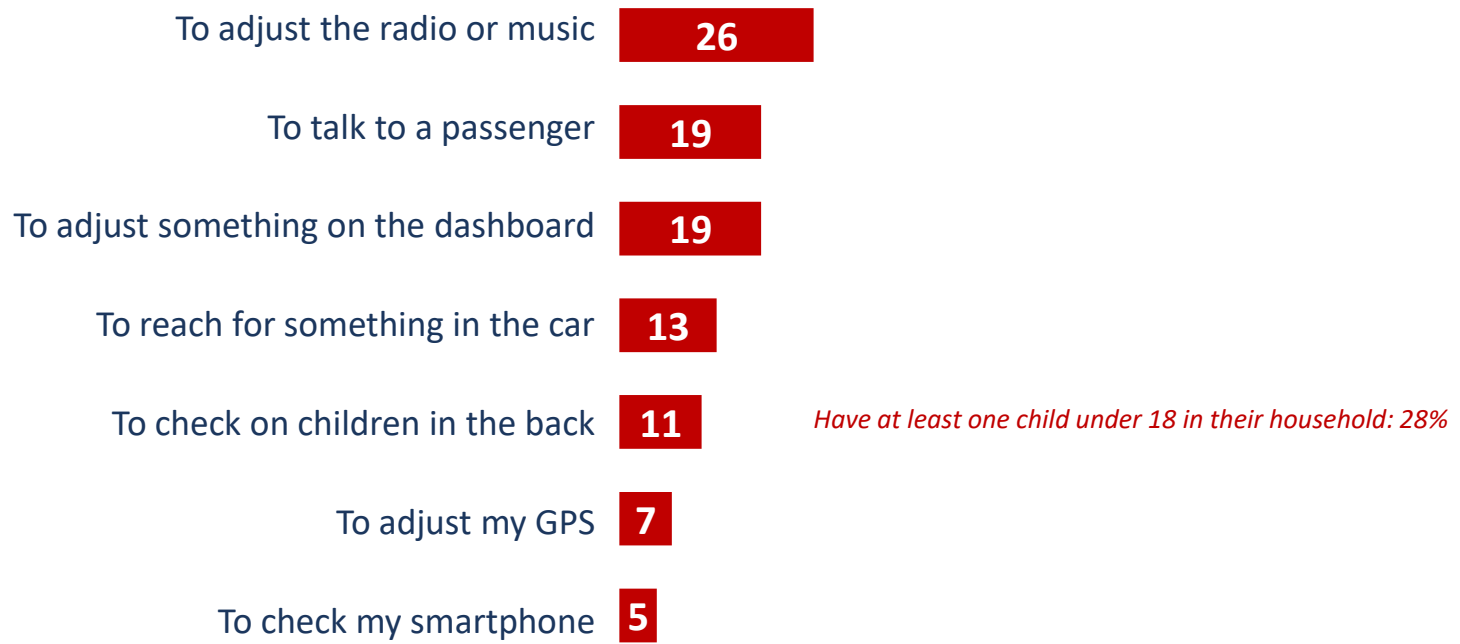
BREAKDOWN BY COUNTRY	2021 %	Change on 2020
FRANCE	74	=
GERMANY	67	-3
BELGIUM	80	=
SPAIN	72	-1
GB	66	-4
ITALY	65	-1
SWEDEN	82	-6
GREECE	87	+1
POLAND	86	+1
NETHERLANDS	80	=
SLOVAKIA	83	+1



Base: Drivers

Do you ever take your eyes off the road for longer than two seconds while driving?

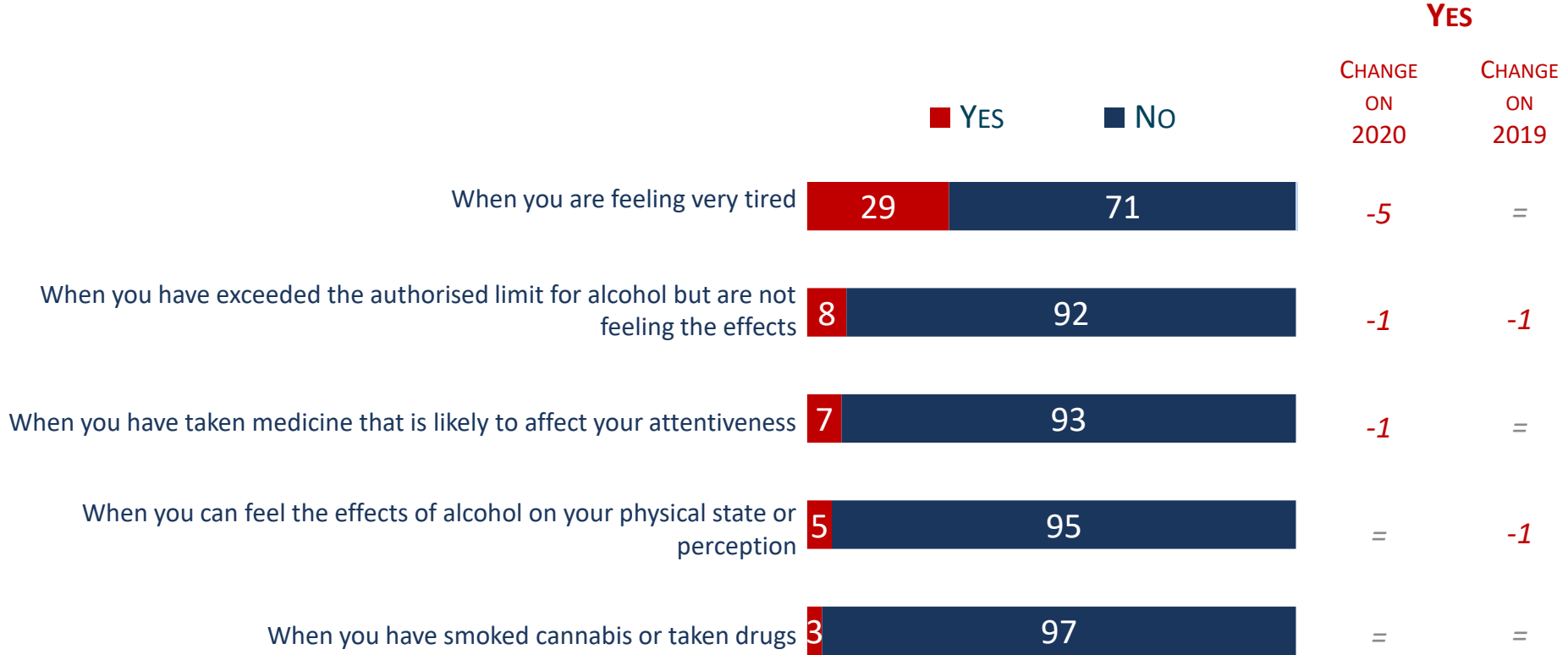
Reasons why drivers take their eyes off the road for longer than two seconds



Base: drivers who take their eyes off the road for longer than two seconds (76% of the sample)



Prevalence of at-risk behaviours

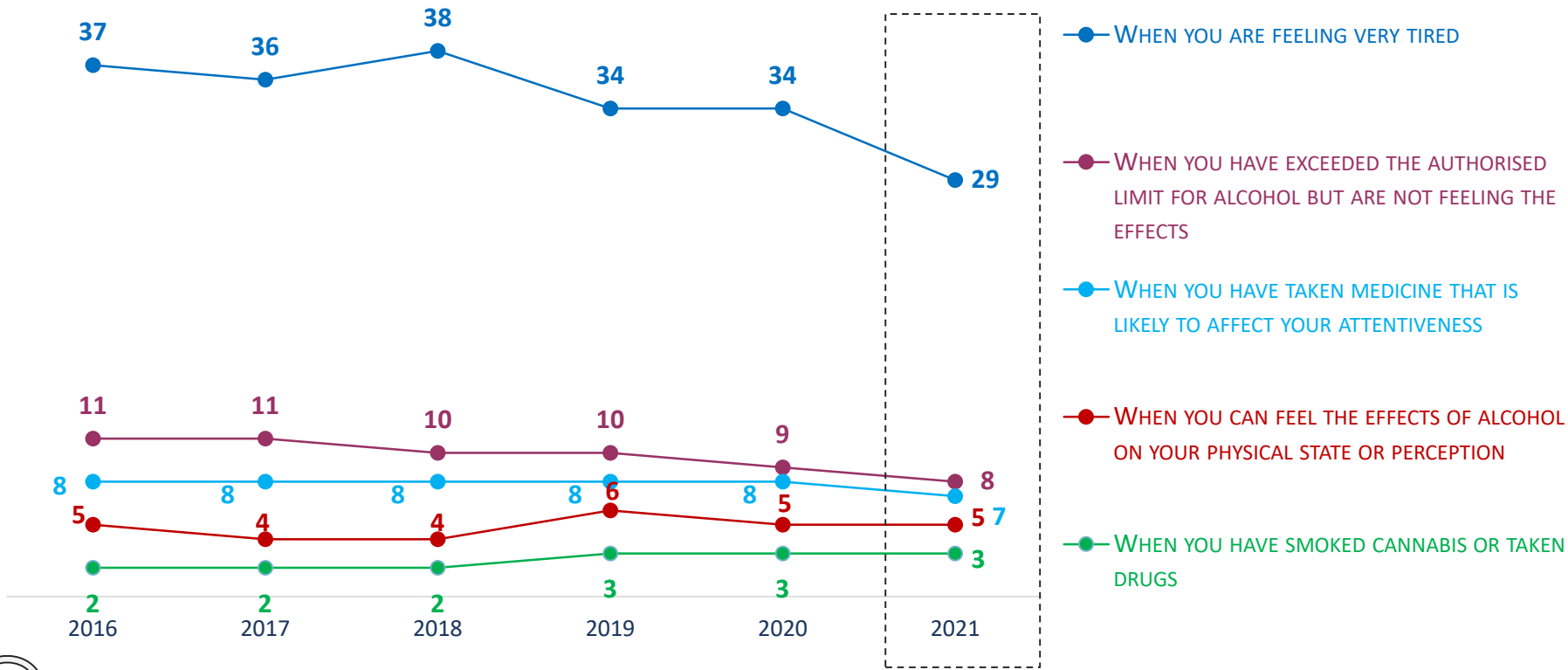


Base: Drivers

60 Do you ever take the wheel in the following situations?



Prevalence of at-risk behaviours - % "YES"



Base: Drivers



Prevalence of at-risk behaviours - BREAKDOWN BY COUNTRY

ANSWER
YES %

	When you are feeling very tired			When you have exceeded the authorised limit for alcohol but are not feeling the effects			When you have taken medicine that is likely to affect your attentiveness			When you can feel the effects of alcohol on your physical state or perception			When you have smoked cannabis or taken drugs		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	29	-5	=	8	-1	-1	7	-1	=	5	=	-1	3	=	=
FRANCE	35	-1	-4	12	-2	-2	11	-2	+2	6	-1	=	3	=	+2
GERMANY	21	-4	-2	7	+3	-1	6	-4	=	4	+2	-1	2	-1	=
BELGIUM	39	-2	=	20	=	-3	9	-3	+1	10	+1	-1	4	+1	=
SPAIN	21	-5	+2	7	+2	-3	8	=	-3	5	=	-2	3	=	-1
GB	19	-9	-3	4	-1	=	4	-1	-2	3	-1	-1	2	=	-1
ITALY	29	-1	-4	8	-3	-1	5	-1	-2	4	-1	-1	2	=	-1
SWEDEN	25	-8	=	4	+1	-1	7	+1	-1	5	+2	=	3	+1	=
GREECE	39	-12	+3	16	-4	-4	9	+2	=	9	-1	-3	6	+1	+1
POLAND	41	-3	-3	4	=	+1	7	=	=	3	=	+1	2	=	=
NETHERLANDS	25	-5	+7	5	+1	=	6	-1	+2	3	-1	=	3	+1	=
SLOVAKIA	26	-1	-4	3	=	=	7	=	-2	2	-1	+1	2	=	=



Base: Drivers

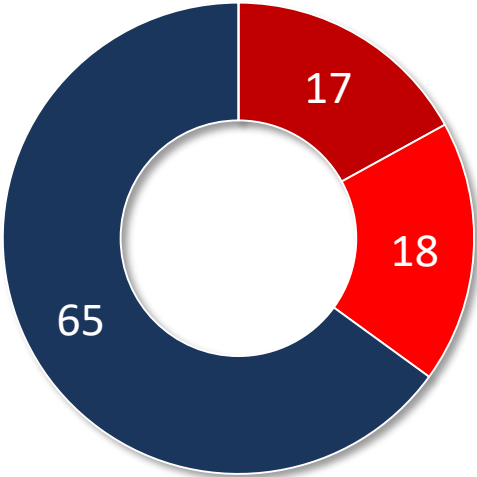
62 Do you ever take the wheel in the following situations?

IMPACT OF THE HEALTH CRISIS ON LONG CAR JOURNEYS

8

Long car journeys made during the COVID-19 crisis

- Yes, several times
- Yes, once
- No
- No answer



% YES
35

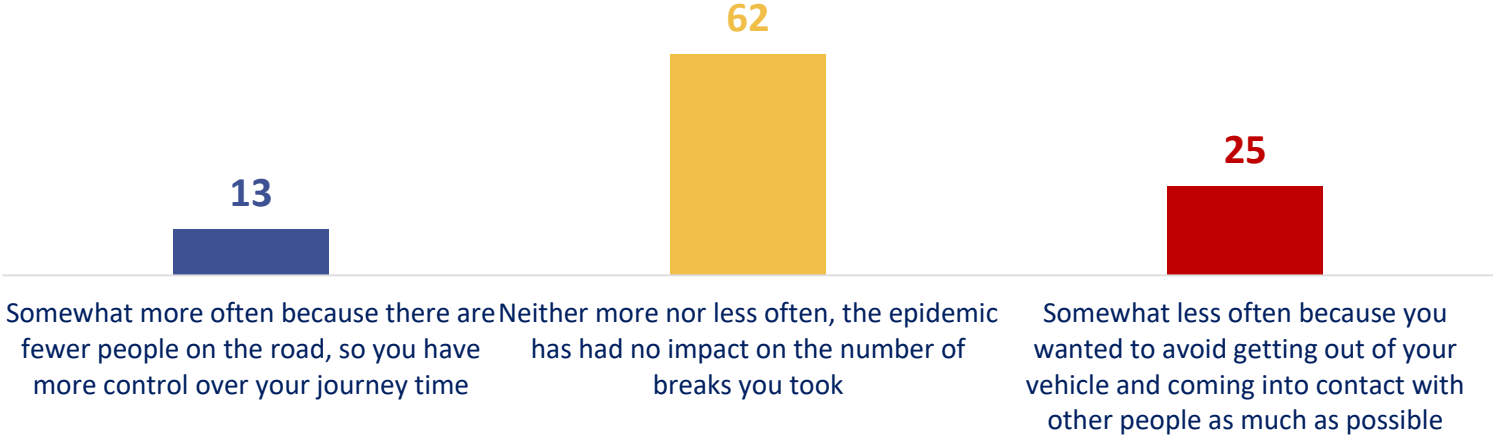
BREAKDOWN BY COUNTRY	
YES	2021 %
FRANCE	48
GERMANY	30
BELGIUM	27
SPAIN	33
GB	21
ITALY	38
SWEDEN	41
GREECE	39
POLAND	51
NETHERLANDS	27
SLOVAKIA	35



Base: Drivers

Since the start of the COVID-19 crisis, have you gone on any car journeys of over three hours (for holidays, business trips, to see family, to attend an event, etc.)?

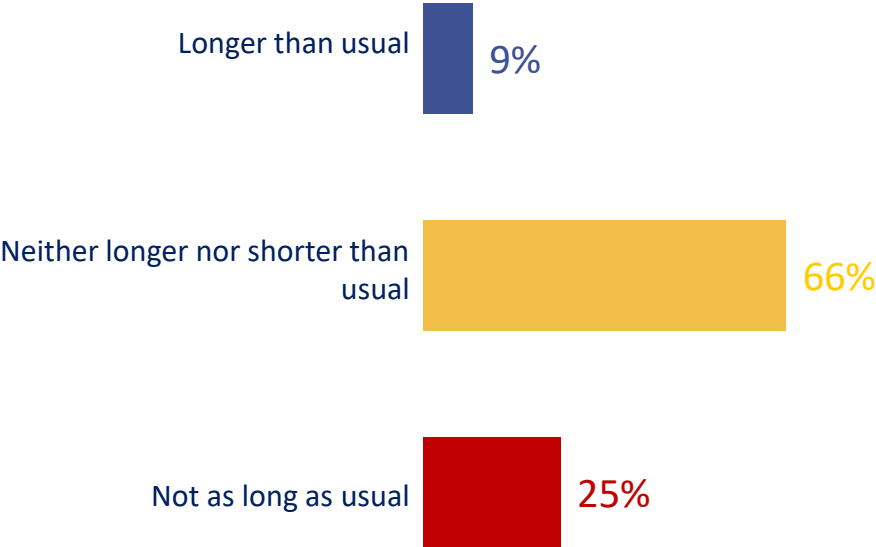
Breaks taken on long car journeys during the COVID-19 crisis



Base: drivers who said they had travelled for more than three hours in the car since the start of the COVID-19 crisis (35% of drivers)

And since the health crisis, would you say that, overall, you have stopped for a break more often or less often during journeys of over three hours...?

The length of breaks taken on long car journeys during the COVID-19 crisis

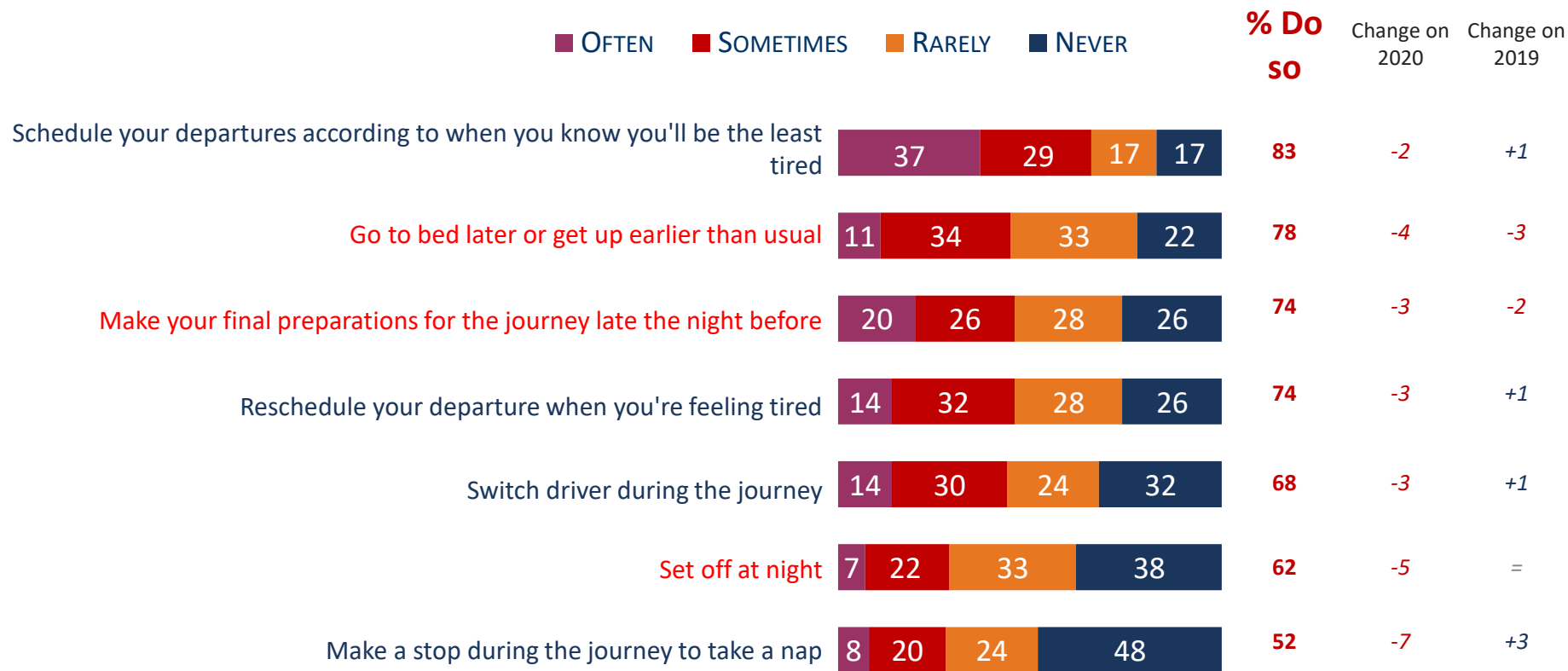


Base: drivers who said they had travelled for more than three hours in the car since the start of the COVID-19 crisis (35% of drivers)

LONG JOURNEYS AND INATTENTIVENESS

9

Behaviour during long journeys



Base: Drivers

68 As a general rule, when you are going to set off on a fairly long drive (at least three hours), do you ever do any of the following things?

Behaviour during long journeys - BREAKDOWN BY COUNTRY

% Do so

	Schedule your departures according to when you know you'll be the least tired			Go to bed later or get up earlier than usual			Make your final preparations for the journey late the night before			Reschedule your departure when you're feeling tired		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	83	-2	+1	78	-4	-3	74	-3	-2	74	-3	+1
FRANCE	80	-2	-1	81	-2	-2	67	-1	-6	74	-6	+2
GERMANY	80	-5	+3	72	-6	-4	70	-3	-3	72	-2	=
BELGIUM	77	-3	+2	79	-2	-4	75	-4	+1	66	-6	+3
SPAIN	91	-2	+3	84	+3	-6	72	-3	-5	81	=	-2
GB	84	-1	+4	81	-5	+1	78	-4	-3	73	=	+3
ITALY	86	-2	+1	76	-5	-4	74	-3	-3	75	-3	+3
SWEDEN	84	-3	=	81	-6	-1	79	-5	=	81	+2	=
GREECE	93	=	-1	85	-4	-1	88	-2	-1	85	-1	-1
POLAND	82	-6	-2	81	-7	-5	65	-6	-1	79	-6	+2
NETHERLANDS	67	+2	-2	73	-3	-5	69	-2	+4	48	-6	+2
SLOVAKIA	86	-1	-1	68	-3	-4	74	-6	-2	79	-3	+1



Base: Drivers

As a general rule, when you are going to set off on a fairly long drive (at least three hours), do you ever do any of the following things?



Behaviour during long journeys - BREAKDOWN BY COUNTRY

% Do so

	Switch driver during the journey			Set off at night			Make a stop during the journey to take a nap		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	68	-3	+1	62	-5	=	52	-7	+3
FRANCE	71	-4	+1	65	-3	+1	58	-5	=
GERMANY	62	-3	-1	63	-10	-1	48	-6	+1
BELGIUM	67	-5	+4	62	-2	+2	78	-3	=
SPAIN	71	-4	+3	60	-6	+2	52	-5	+2
GB	64	+3	+1	59	-11	+9	45	-8	+7
ITALY	64	-5	-1	62	-2	-3	66	-3	=
SWEDEN	77	-1	-2	53	-13	+2	41	-10	+1
GREECE	70	-4	+2	65	-4	-3	41	-5	+4
POLAND	68	-6	-1	68	-4	-7	49	-13	+4
NETHERLANDS	64	-4	+4	52	-5	+5	42	-6	+4
SLOVAKIA	70	-5	+3	68	-7	+4	50	-9	+6



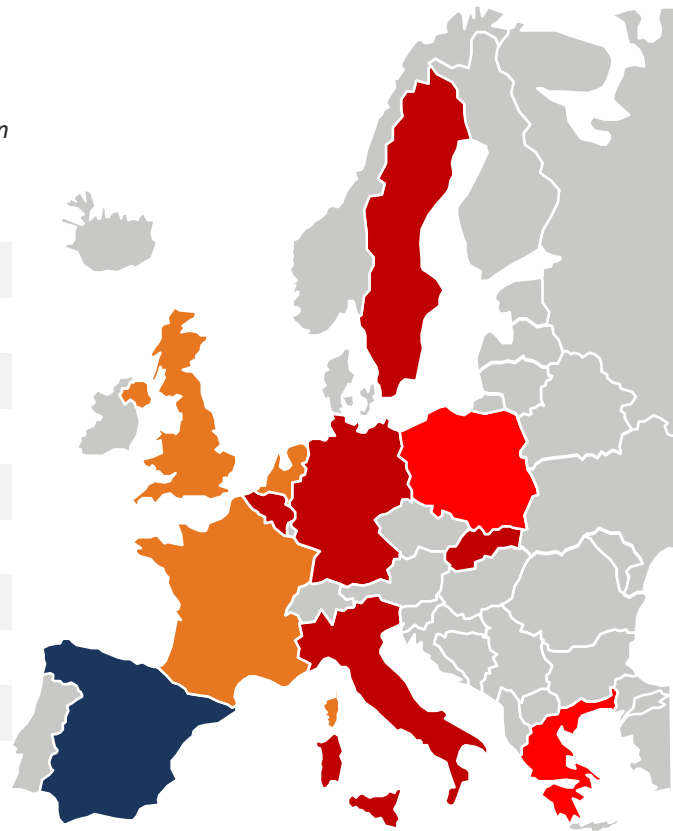
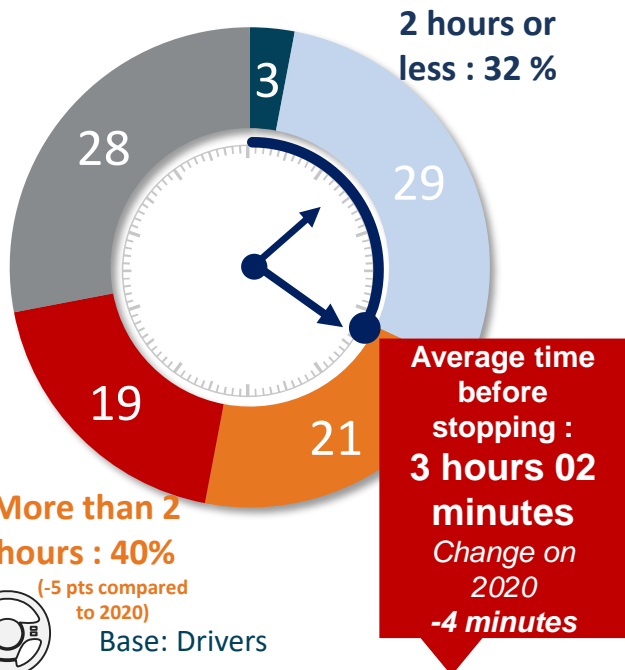
Base: Drivers

Number of hours spent behind the wheel before taking a break

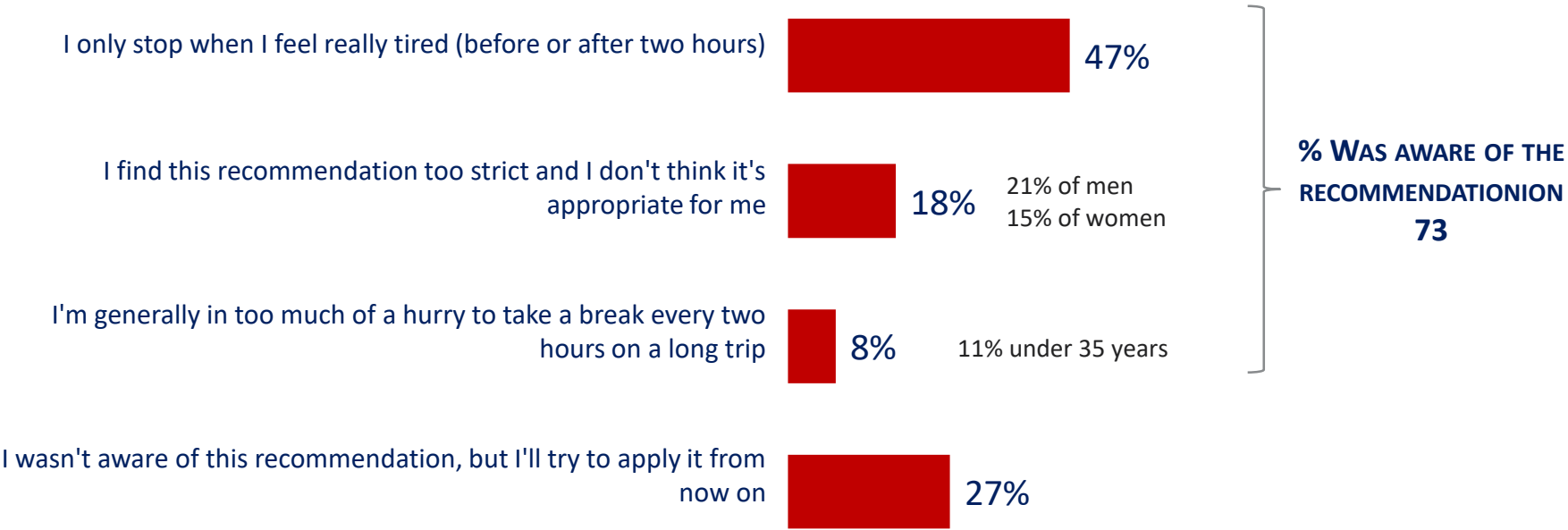
- FEWER THAN 2 HOURS
- 2 HOURS
- 2 TO 3 HOURS
- MORE THAN 3 HOURS
- I DON'T TAKE LONG DRIVES

AVERAGE TIME BEFORE STOPPING

BREAKDOWN BY COUNTRY	2021	Change on 2020	Change on 2019
FRANCE	2:50	-2min	+3 min
GERMANY	3:17	-6min	-19 min
BELGIUM	3:02	+3min	-6 min
SPAIN	2:37	+1min	-14 min
GB	2:47	-3min	-3 min
ITALY	3:05	-6min	-16 min
SWEDEN	3:01	-9min	-15 min
GREECE	3:30	+16min	-24 min
POLAND	3:38	-12min	-33 min
NETHERLANDS	2:40	-11min	-2 min
SLOVAKIA	3:01	-15min	-9 min



Reason for not taking a break every two hours



Total over 100, two possible responses



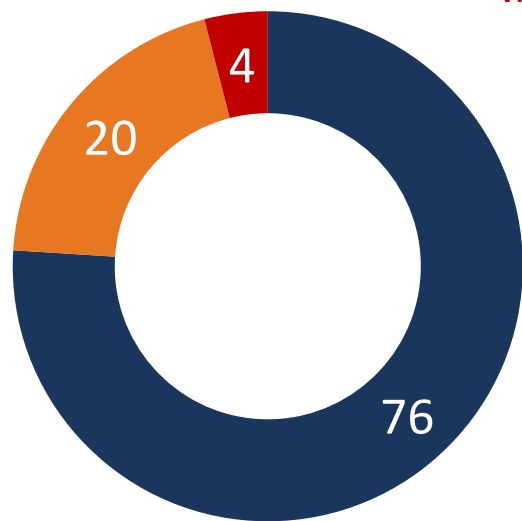
Base: those who made a long car journey lasting more than two hours (40% of drivers)
Experts recommend taking a break every two hours to prevent the risk of drowsiness and to maintain your level of attention. Which of the following best explains why you don't follow this recommendation?

Perception of the risk posed by driving when tired

- IT'S SOMETHING YOU MUST NEVER DO
- YOU CAN DO IT IF YOU'RE EXTREMELY CAREFUL
- YOU CAN DO IT BECAUSE THERE ARE WAYS TO AVOID FALLING ASLEEP

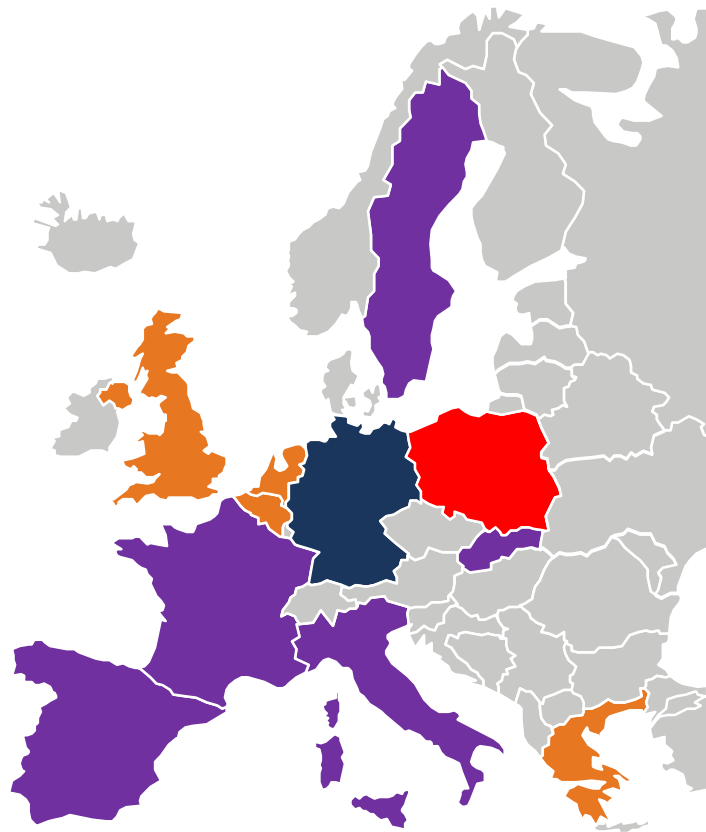
IT CAN BE DONE : 24%

CHANGE ON
2020 : - 4



BREAKDOWN BY COUNTRY "IT CAN BE DONE"

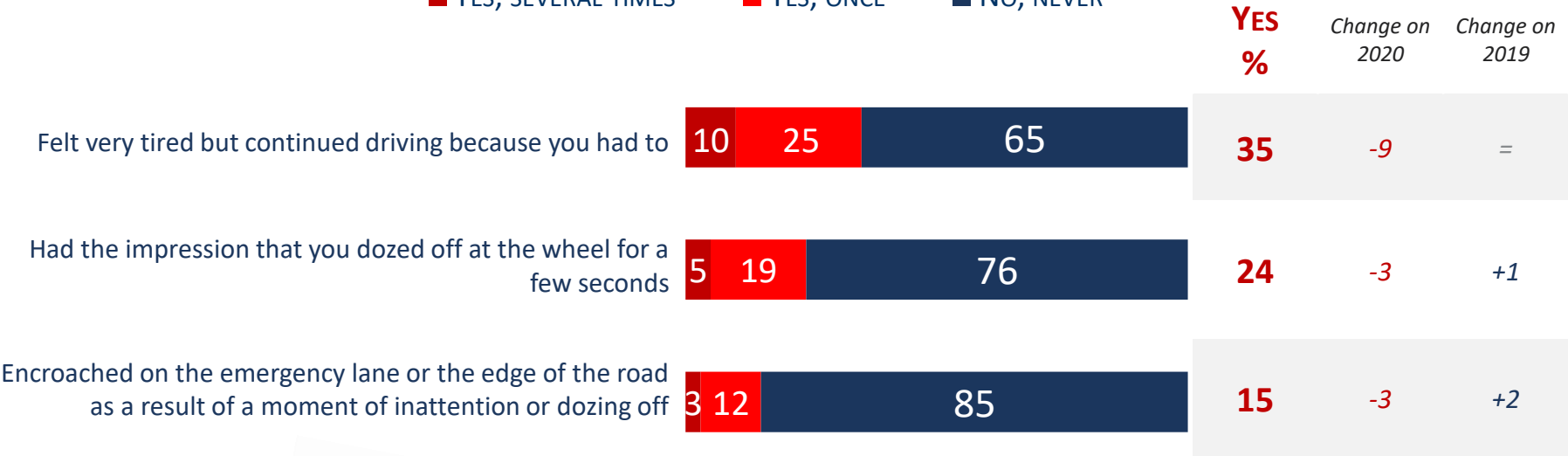
	2021 %	CHANGE ON 2020	CHANGE ON 2019
FRANCE	22	-6	+5
GERMANY	15	=	-1
BELGIUM	25	-4	+1
SPAIN	21	-5	-1
GB	23	-8	=
ITALY	21	-5	+1
SWEDEN	21	-2	-2
GREECE	23	+1	-4
POLAND	42	-8	+4
NETHERLANDS	28	-10	+6
SLOVAKIA	22	-4	+2



Base: Drivers

Incidents related to inattentiveness

■ YES, SEVERAL TIMES ■ YES, ONCE ■ NO, NEVER



45% of drivers have experienced at least one of these situations, including:

55% of French people and 51% of Belgian people

58% of men under 35 years

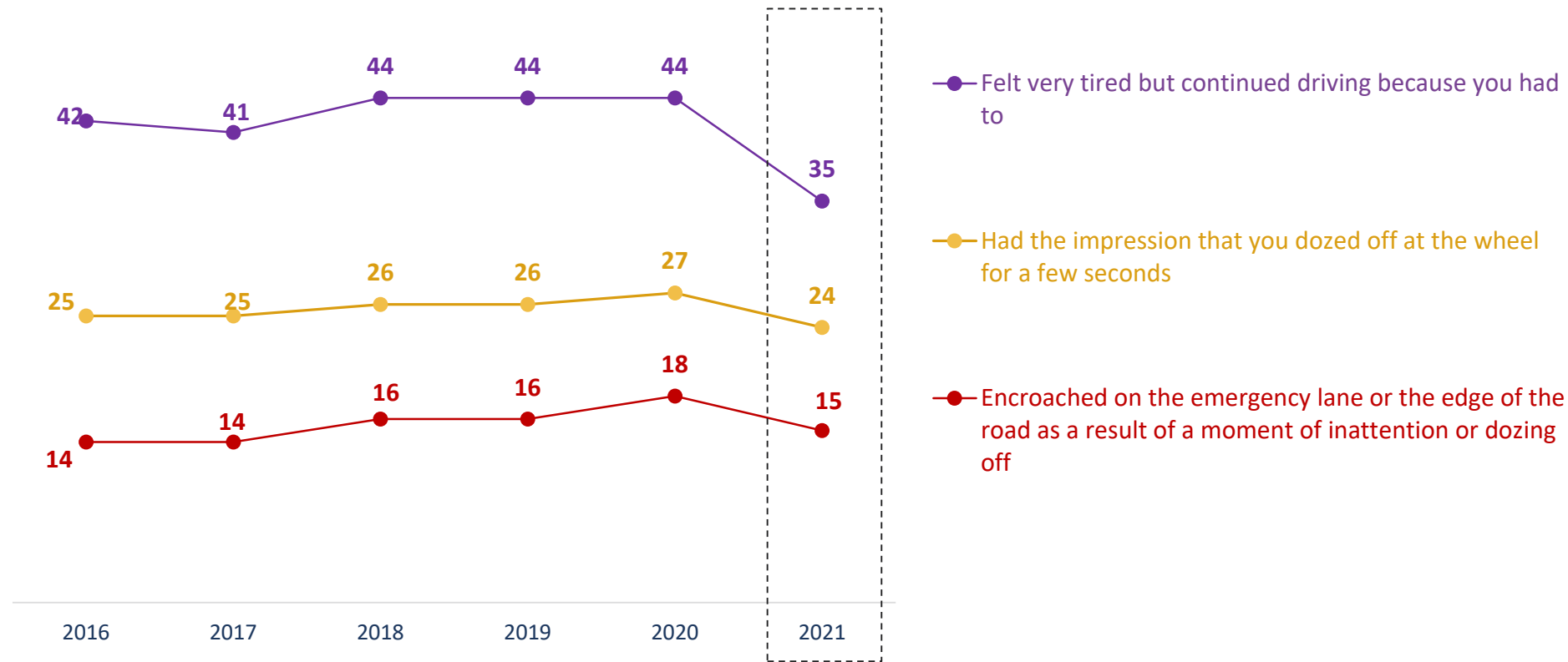
84% of people who decided to drive after taking cannabis or other drugs



Base: Drivers

More specifically, over the last few years, have you run into any of the following problems while driving?

Incidents related to inattentiveness



Base: Drivers

75 More specifically, over the last few years, have you run into any of the following problems while driving?



Incidents related to inattentiveness - BREAKDOWN BY COUNTRY

YES %

Base: Drivers

	Felt very tired but continued driving because you had to			Had the impression that you dozed off at the wheel for a few seconds			Encroached on the emergency lane or the edge of the road as a result of a moment of inattention or dozing off		
	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019	2021	Change on 2020	Change on 2019
TOTAL	35	-9	=	24	-3	+1	15	-3	+2
FRANCE	39	-8	+1	32	-2	-3	25	-3	=
GERMANY	41	-8	-4	28	+1	-3	11	-1	+1
BELGIUM	39	-4	-2	30	-1	=	15	-3	+2
SPAIN	28	-11	+1	21	-2	+2	19	-4	+5
GB	29	-16	+2	14	-6	+3	9	-4	=
ITALY	33	-7	-2	24	-4	-3	13	-6	=
SWEDEN	40	-10	=	27	-2	+5	20	-4	+4
GREECE	37	-11	-1	22	-5	+1	12	=	+1
POLAND	33	-7	-2	18	-4	-2	15	-1	+1
NETHERLANDS	30	-5	+3	22	-1	+2	12	-1	+3
SLOVAKIA	37	-8	+2	21	-9	+3	19	-1	+4



Base: Drivers

76 More specifically, over the last few years, have you run into any of the following problems while driving?

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