

SHARING THE ROAD

EUROPEANS AND RESPONSIBLE DRIVING

2025 EDITION

YOUR IPSOS FRANCE CONTACTS

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FONDATION



Bien (se) conduire

TECHNICAL SPECIFICATIONS

SAMPLE



12,403 individuals aged 16 years and over, including at least 1000 individuals in each of the surveyed countries

In the aggregated results, each of the 11 countries is represented with the same weighting.

SURVEY DATE



From 11 February to 10 March 2025

Survey conducted for

FONDATION



Bien (se) conduire

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

This report has been produced in accordance with international standard ISO 20252 "Market, opinion and social research". This report was reviewed by Etienne Mercier, Director of Opinion (Ipsos Public Affairs).

COUNTRIES SURVEYED

SAMPLE

TOTAL 12,403 respondents

FRANCE  2,403 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



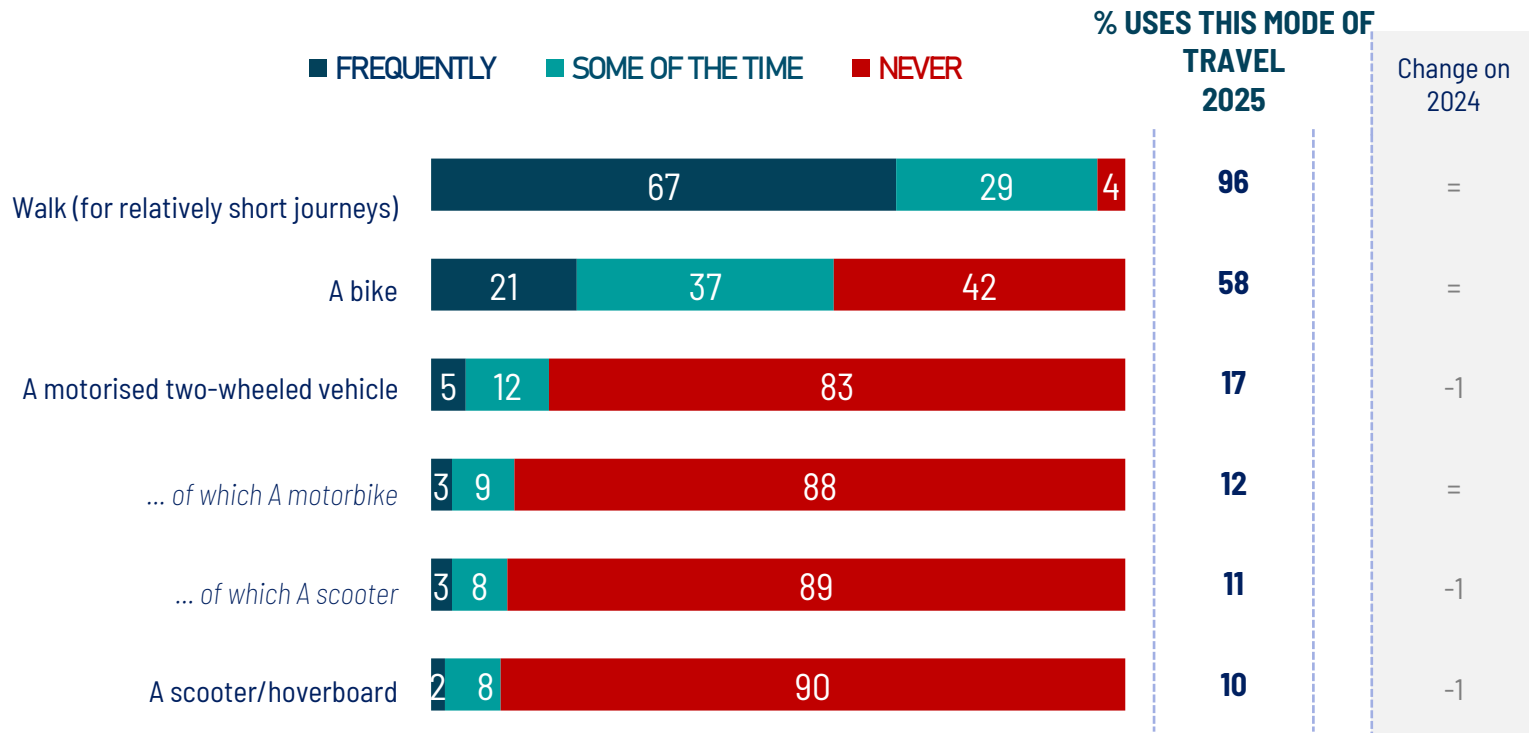
RESULTS



Pedestrians, bicycles, two-wheel motorised vehicles and personal transporters

And for getting around on a daily basis, do you use:

Base: Total



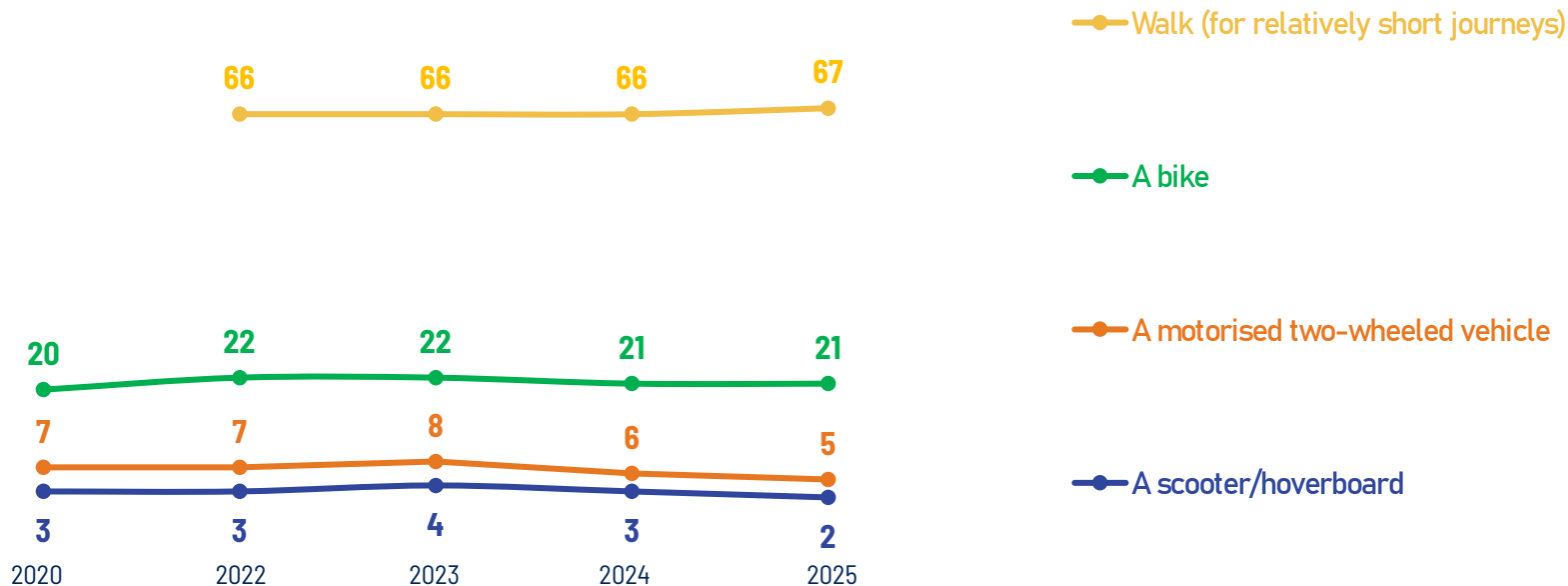
Pedestrians, bicycles, two-wheel motorised vehicles and personal transporters -

Changes

On the basis of your answers around on a daily basis, do you use:

Base: Total

% USES THIS MODE OF TRAVEL REGULARLY



Pedestrians, bicycles, two-wheel motorised vehicles and personal transporters - Breakdown by country

And for getting around on a daily basis, do you use:

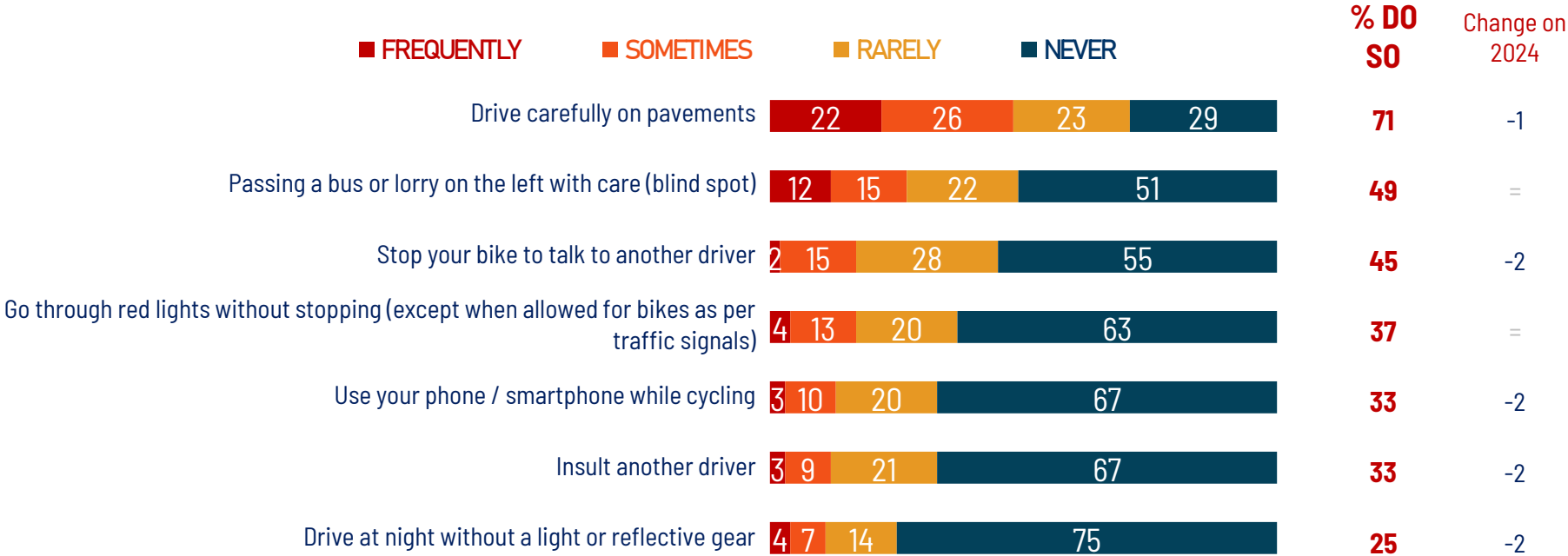
👤 Base: Total

% FREQUENTLY		Walk (for relatively short journeys)		A bike		A motorised two-wheeled vehicle		A motorbike		A scooter		A scooter / hoverboard	
	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	
TOTAL	67	+1	21	=	5	-1	3	=	3	=	2	-1	
FRANCE 	61	+4	12	+1	3	-1	2	=	2	=	2	=	
GERMANY 	67	+3	23	-1	2	-3	1	-2	2	-1	1	-1	
BELGIUM 	53	=	26	=	3	-2	2	-1	1	-1	2	=	
SPAIN 	77	=	7	=	6	=	5	+2	3	=	3	+1	
UK 	59	-1	7	=	4	-1	2	-2	2	=	1	-2	
ITALY 	65	+1	14	-2	8	-1	4	=	5	-1	2	-1	
SWEDEN 	60	-5	20	-4	5	+3	3	+2	2	+1	2	-1	
GREECE 	70	=	12	+2	13	=	9	+1	6	-1	3	-1	
POLAND 	71	+2	25	+1	3	=	2	=	2	=	2	=	
NETHERLANDS 	77	+2	60	+2	4	=	2	=	3	=	1	=	
SLOVAKIA 	68	+3	19	-2	3	-2	2	-1	2	=	3	=	

Incivilities and dangerous behaviour when cycling

When using a bike, do you do the following things?

🚲 Base: for those who regularly use a bicycle (21% of the sample)

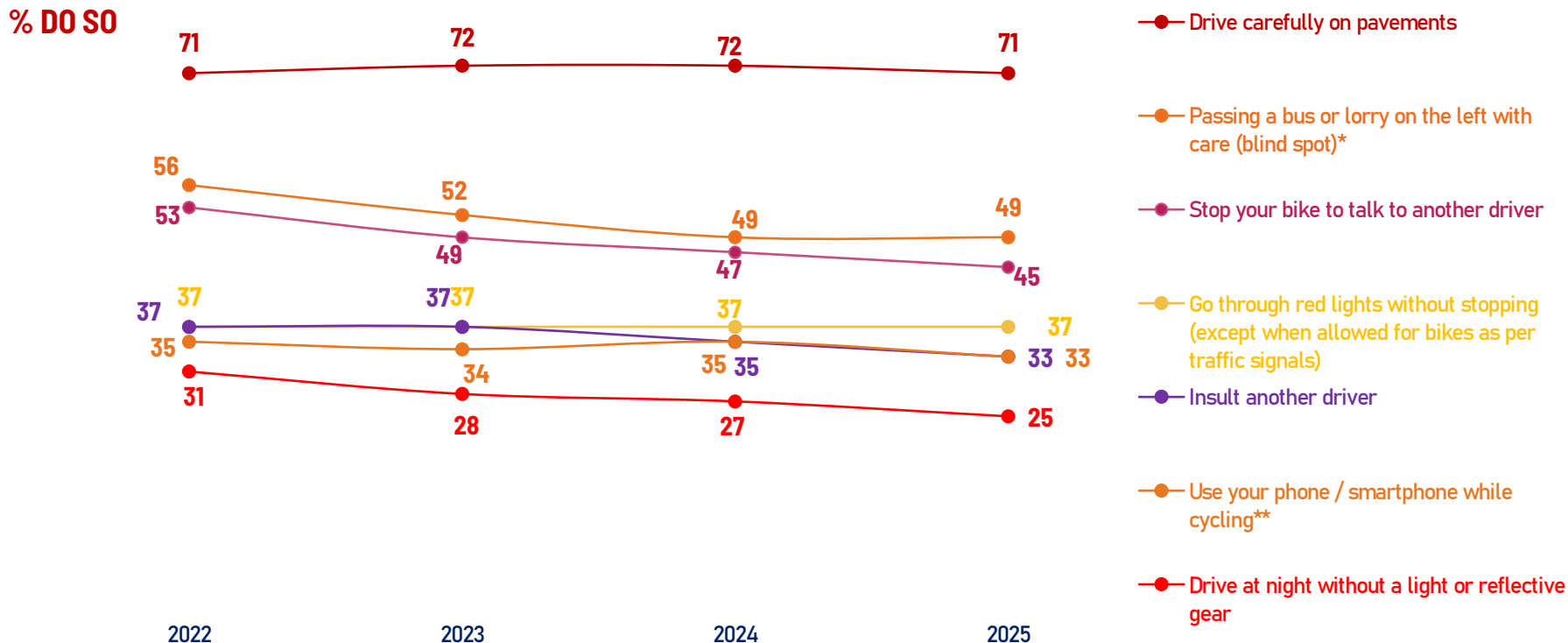


On average 2.9 uncivil or dangerous acts out of 7 tested (-0.1 vs 2024)

Incivilities and dangerous behaviour when cycling - Changes

When using a bike, do you do the following things?

 Base: for those who regularly use a bicycle (21% of the sample)

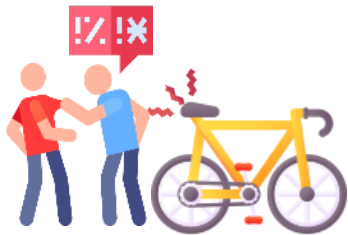


* The specification "(blind spot)" was added in 2023 / ** the specification "/ smartphone" was added in 2023

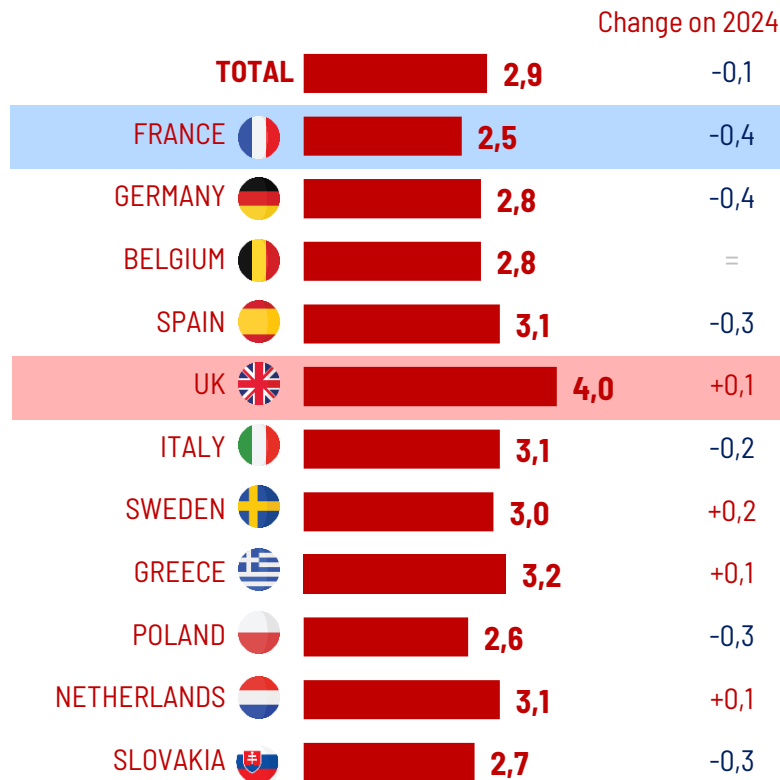
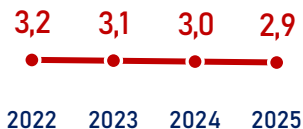
Average number of uncivil and dangerous cycling behaviours by country

When using a bike, do you do the following things?

🚲 Base: for those who regularly use a bicycle (21% of the sample)



**On average 2.9 uncivil
or dangerous acts
out of 7 tested**



Incivilities and dangerous behaviour when cycling - Breakdown by country

When using a bike, do you do the following things?

 Base: for those who regularly use a bicycle (21% of the sample)

	% DO SO FREQUENTLY + SOMETIMES + RARELY	Drive carefully on pavements		Passing a bus or lorry on the left with care (blind spot)		Stop your bike to talk to another driver		Go through red lights without stopping (except when allowed for bikes as per traffic signals)		Insult another driver		Use your phone / smartphone while cycling		Drive at night without a light or reflective gear	
		2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024
TOTAL	71	-1	49	=	45	-2	37	=	33	-2	33	-2	25	-2	
FRANCE 	60	-2	33	-7	27	-7	40	-4	44	-4	27	-9	23	-4	
GERMANY 	71	-13	52	=	26	-5	44	+2	40	-5	21	-10	27	-4	
BELGIUM 	63	-1	62	+6	45	-2	28	=	32	-2	31	=	21	+1	
SPAIN 	73	-2	34	-8	40	-9	47	-7	49	+10	32	-11	33	-1	
UK 	84	+3	62	+2	66	+8	51	+8	51	-1	47	-7	41	-6	
ITALY 	63	-3	34	+2	63	-3	33	-8	50	+4	35	-7	31	-1	
SWEDEN 	80	+7	35	-3	42	-3	38	+5	28	+3	42	+8	32	+1	
GREECE 	86	+7	33	-10	61	+6	35	+1	34	-1	41	+5	31	-1	
POLAND 	80	-4	50	-3	40	-2	20	-6	22	-7	26	-8	18	-9	
NETHERLANDS 	65	=	57	+3	47	=	49	+5	29	-2	36	+1	25	+2	
SLOVAKIA 	77	+2	52	=	53	-2	18	-7	29	-9	27	-4	17	-8	

Cyclists' fear of other road users' behaviour

When using a bike, do you do the following things?

 Base: for those who regularly use a bicycle (21% of the sample)

FREQUENTLY **SOMETIMES** **RARELY** **NEVER**

**%
AFRAID**

Change on
2024

Fear dangerous behaviour from other road users (bikes, scooters, pedestrians, cars, lorries, buses, coaches, two-wheeled motorised vehicles etc.)



88

-1



Fear aggressive behaviour of motorised road users (motorised two-wheeled vehicles, cars etc.)



79

-1



Cyclists' fear of other road users' behaviour - Breakdown by country

When using a bike, do you do the following things?

 Base: for those who regularly use a bicycle (21% of the sample)

	% AFRAID		Fear dangerous behaviour from other road users		Fear aggressive behaviour of motorised road users	
	FREQUENTLY + SOMETIMES + RARELY					
	2025	Change on 2024	2025	Change on 2024		
TOTAL	88	-1	79	-1		
FRANCE 	88	-9	79	-8		
GERMANY 	84	-4	77	-2		
BELGIUM 	92	+2	80	+3		
SPAIN 	82	-3	84	+1		
UK 	84	-9	83	-9		
ITALY 	90	-2	89	+4		
SWEDEN 	90	=	83	-2		
GREECE 	91	-2	86	-1		
POLAND 	88	-2	86	+4		
NETHERLANDS 	87	+2	70	+1		
SLOVAKIA 	93	-2	85	-4		

Sense of safety when cycling

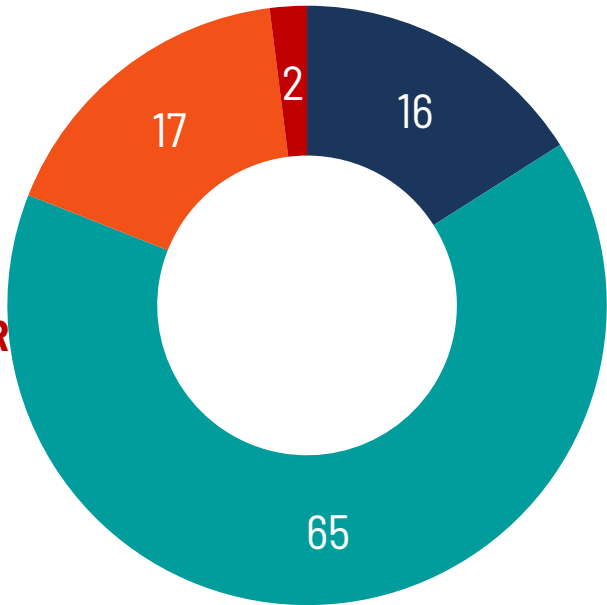
And when you travel by bike, do you feel safe?

 Base: for those who regularly use a bicycle (21% of the sample)

- ALWAYS
- OFTEN
- RARELY
- NEVER

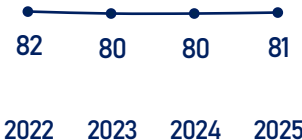
% RARELY/NEVER
19

% rural areas: 18
% large cities: 20



% ALWAYS/OFTEN

81



BREAKDOWN BY COUNTRY		2025		Change on 2024
% "ALWAYS/OFTEN"		TOTAL		
		81		+1
FRANCE		57		-2
GERMANY		86		+6
BELGIUM		80		+3
SPAIN		75		+3
UK		78		-4
ITALY		59		-6
SWEDEN		92		=
GREECE		67		-4
POLAND		81		+7
NETHERLANDS		93		=
SLOVAKIA		72		+3

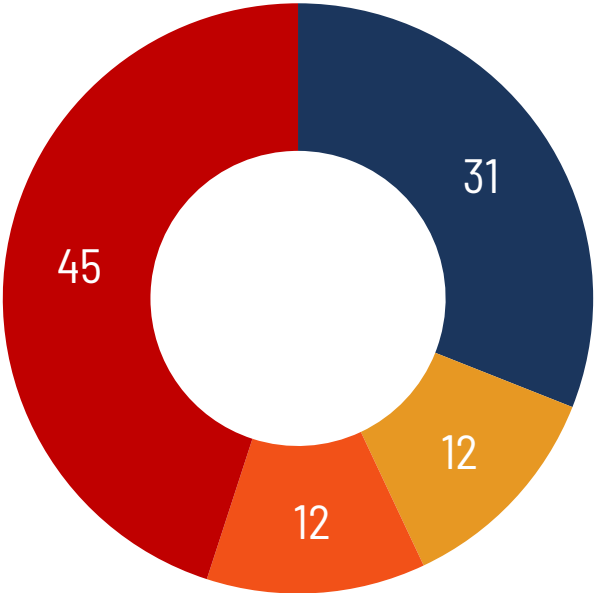
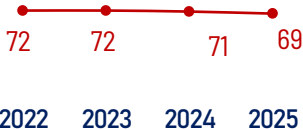
Wearing a helmet when cycling

When using a bike, do you do the following things?
🚲 Base: for those who regularly use a bicycle (21% of the sample)

Wear a helmet

- FREQUENTLY
- SOMETIMES
- RARELY
- NEVER

% NOT FREQUENTLY
69



BREAKDOWN BY COUNTRY		2025	Change on 2024
% "NOT FREQUENTLY"			
TOTAL		69	-2
FRANCE		56	+7
GERMANY		61	-10
BELGIUM		70	+6
SPAIN		41	-7
UK		43	-3
ITALY		68	-2
SWEDEN		58	=
GREECE		50	-1
POLAND		66	-8
NETHERLANDS		90	-3
SLOVAKIA		64	-4

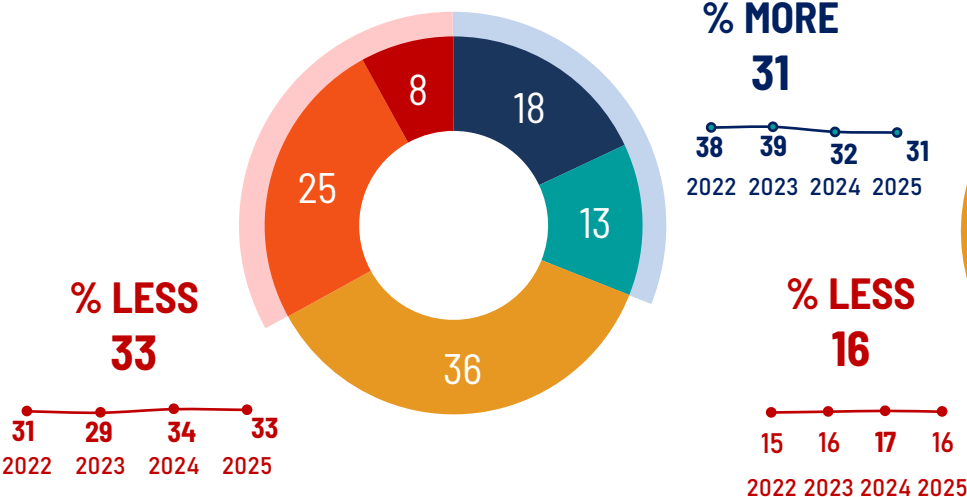
Respect for signs and the need to pay attention when cycling vs. driving

In general, would you say that when you are cycling...

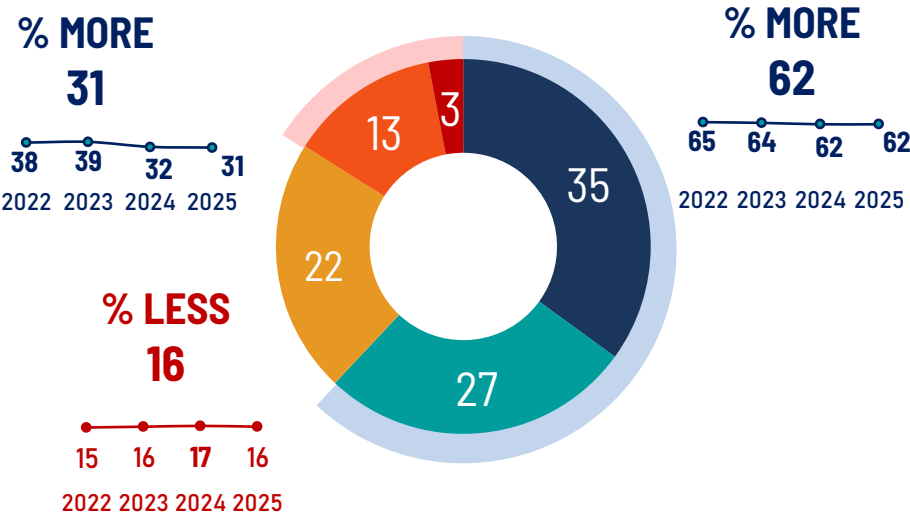
  Base: For those who regularly cycle and drive a car

- A LOT MORE THAN WHEN DRIVING A CAR
- A LITTLE MORE THAN WHEN DRIVING A CAR
- NEITHER MORE NOR LESS

You follow road signs and lights...



You have to take care...



Respect for signs and the need to pay attention when cycling vs. driving - Breakdown by country

In general, would you say that when you are cycling...



Base: For those who regularly cycle and drive a car

	You follow road signs and lights...				You have to take care...			
	% More		% Less		% More		% Less	
	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024
TOTAL	31	-1	33	-1	62	=	16	-1
FRANCE	32	-5	30	+1	73	-15	12	+7
GERMANY	28	+3	39	+4	73	+4	10	-3
BELGIUM	24	-4	22	-5	58	-11	15	+3
SPAIN	53	+3	20	-9	77	=	8	-8
UK	71	+6	16	-1	79	-2	16	+5
ITALY	54	-6	35	+1	78	+2	19	-1
SWEDEN	24	+3	39	-4	62	+5	18	-6
GREECE	55	-2	29	+8	74	-2	10	-6
POLAND	36	=	24	-1	61	-3	22	+7
NETHERLANDS	15	=	41	-2	47	+6	16	-3
SLOVAKIA	36	-8	32	+2	63	+2	23	+2

Incivilities and dangerous behaviour on two-wheel motorised vehicles

While driving a motorised two-wheeled vehicle, do you do the following things?

 Base: for those who regularly use a two-wheel motorised vehicle (5% of the sample)

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER ■ NO ANSWER

Park on the pavement 9 27 25 38 1

Stop in bike boxes (advanced stop lines – the space reserved for bikes at traffic lights, with another line behind signifying where cars should stop), where applicable

18 16 21 45

Insult the drivers of other motorised vehicles (cars, lorries, buses, coaches etc.)

10 16 26 48

Use your smartphone while driving (including hands-free)

9 16 19 56

Drive in bike lanes

13 15 12 59 1

Drive on the pavement

6 16 18 60

% DO SO

Change on 2024

61

-5

55

-9

52

-5

44

-5

40

-10

40

-6



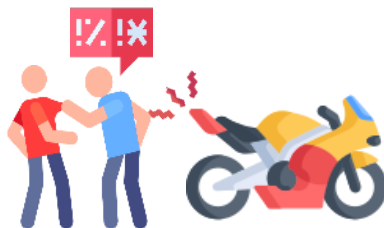
On average 2.9 uncivil or dangerous acts out of 6 tested (-0.4 vs 2024)

Average number of incivilities and dangerous behaviours on two-wheel motorised vehicles

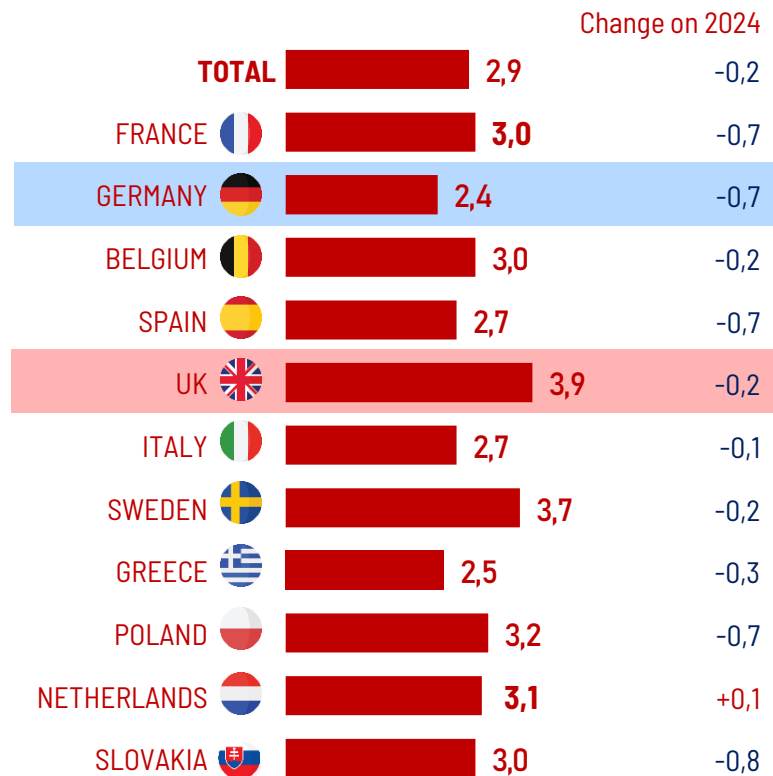
While driving a motorised two-wheeled vehicle, do you do the following things?



Base: for those who regularly use a two-wheel motorised vehicle (5% of the sample)



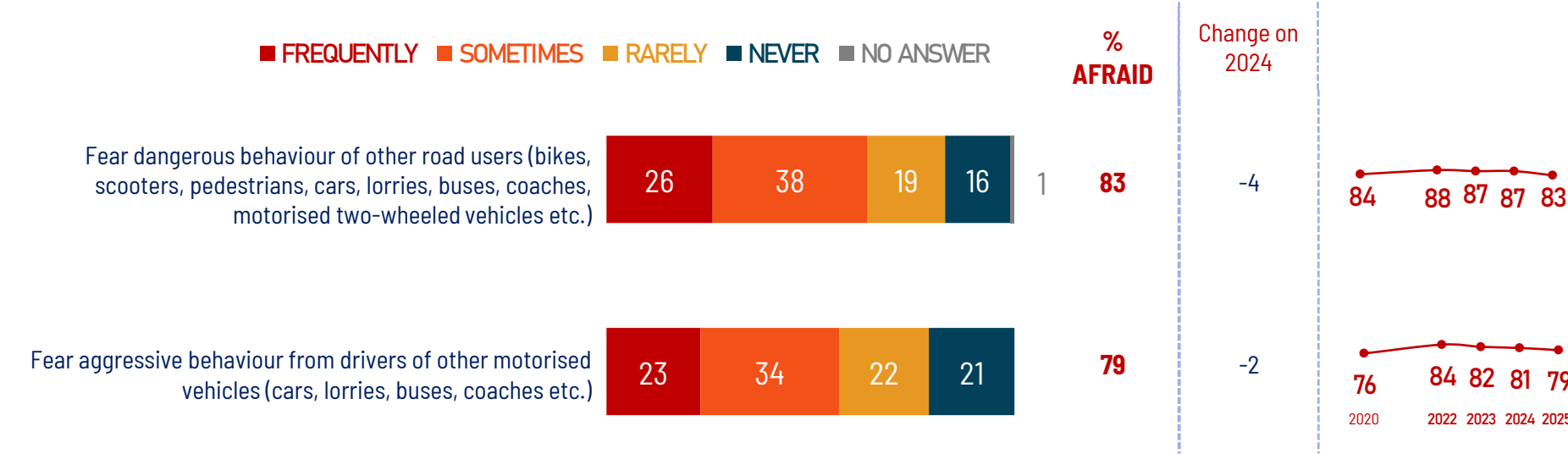
**On average 2.9 uncivil
or dangerous acts**
out of 6 tested
(-0.4 vs 2024)



Fear of two-wheel motorised vehicle drivers towards other road users' behaviour

While driving a motorised two-wheeled vehicle, do you do the following things?

 Base: for those who regularly use a two-wheel motorised vehicle (5% of the sample)



Incivilities and dangerous behaviors on foot and fear of other road users

And as a pedestrian, do you encounter the following situations?

👤 Base: Total



% YES

89

63

% YES

77

57

56



Average number of uncivil pedestrian behaviours by country

And as a pedestrian, do you encounter the following situations?

👤 Base: Total

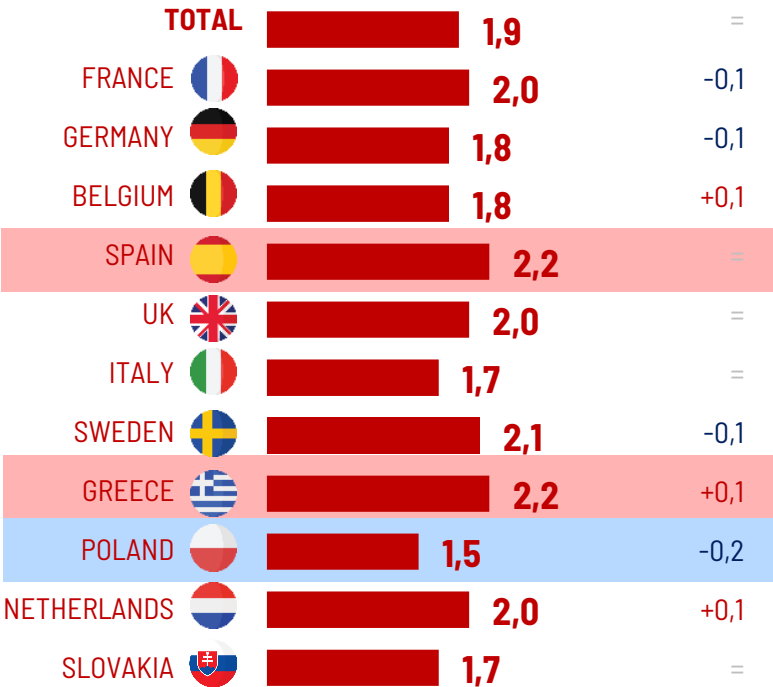
AVERAGE AMOUNT OF RUDE BEHAVIOUR

1,9/3

= / 2024



Change on 2024



Incivilities and dangerous behaviors on foot and fear of other road users - Breakdown by country

And as a pedestrian, do you encounter the following situations?

👤 Base: Total

% YES
FREQUENTLY + SOMETIMES + RARELY

Motorists not stopping to let you cross when you are already on a pedestrian crossing

	2025	Change on 2024
TOTAL	89	=
FRANCE 🇫🇷	92	-1
GERMANY 🇩🇪	82	-2
BELGIUM 🇧🇪	92	-1
SPAIN 🇪🇸	92	-1
UK 🇬🇧	85	+1
ITALY 🇮🇹	91	=
SWEDEN 🇸🇪	88	-1
GREECE 🇬🇷	91	=
POLAND 🇵🇱	87	-2
NETHERLANDS 🇳🇱	91	+3
SLOVAKIA 🇸🇰	85	+1

Bikes/scooters/hoverboards brushing you on the pavement

2025	Change on 2024
63	=
79	-1
48	-2
83	+2
66	=
68	+1
71	-1
68	-2
87	-1
33	-3
44	+4
49	+3



Incivilities and dangerous behaviors on foot and fear of other road users - Breakdown by country

And as a pedestrian, do you encounter the following situations?

👤 Base: Total

	% YES FREQUENTLY + SOMETIMES + RARELY	Crossing outside of any pedestrian crossing, even though there is one less than 50 m away		You use your phone while walking without properly paying attention to what's around you		Crossing a pedestrian crossing when the red man is showing	
		2025	Change on 2024	2025	Change on 2024	2025	Change on 2024
TOTAL		77	-1	57	-1	56	=
FRANCE 🇫🇷		76	-4	57	=	70	+3
GERMANY 🇩🇪		78	-2	47	-6	51	-1
BELGIUM 🇧🇪		79	+3	52	-1	49	+3
SPAIN 🇪🇸		81	=	64	=	71	=
UK 🇬🇧		78	=	58	+1	65	+2
ITALY 🇮🇹		69	-3	57	+1	39	=
SWEDEN 🇸🇪		81	-1	62	+1	72	-5
GREECE 🇬🇷		84	+3	67	+1	66	=
POLAND 🇵🇱		67	-5	49	-6	38	-4
NETHERLANDS 🇳🇱		81	+3	60	+2	58	+2
SLOVAKIA 🇸🇰		74	-1	57	+2	36	=

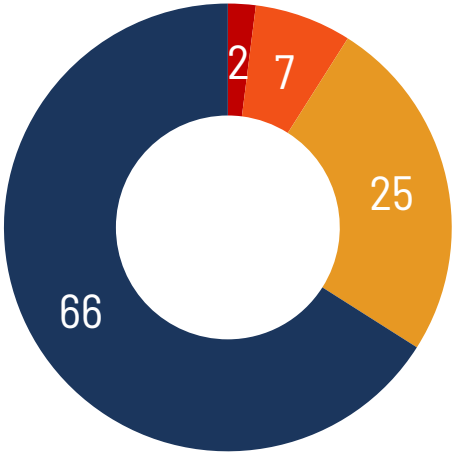


Uncivil and dangerous behaviour by car drivers towards other road users (1/5)

Do you ever do the following when you are driving?
Base: Drivers

Open the door without checking if a cyclist is coming

- OFTEN
- SOMETIMES
- RARELY
- NEVER



% DO SO
34
= / 2024

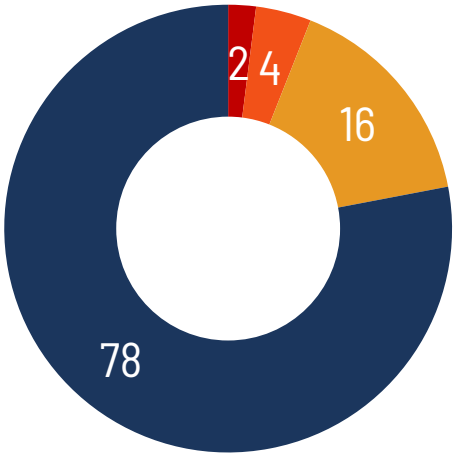
	% DO SO*	2025	Change on 2024
	*OFTEN + SOMETIMES + RARELY		
TOTAL		34	=
FRANCE		34	-2
GERMANY		37	-2
BELGIUM		39	-1
SPAIN		28	=
UK		42	-1
ITALY		30	+3
SWEDEN		44	+1
GREECE		26	+1
POLAND		33	=
NETHERLANDS		35	=
SLOVAKIA		28	=

Uncivil and dangerous behaviour by car drivers towards other road users (2/5)

Do you ever do the following when you are driving?
Base: Drivers

Encroach on bike boxes when stopped at a red light , where applicable

- OFTEN
- SOMETIMES
- RARELY
- NEVER



% DO SO
22
-2 / 2024

	% DO SO*	2025	Change on 2024
	*OFTEN + SOMETIMES + RARELY		
TOTAL		22	-2
FRANCE		29	-4
GERMANY		29	-1
BELGIUM		23	=
SPAIN		19	-2
UK		30	-1
ITALY		19	+2
SWEDEN		26	-1
GREECE		22	-4
POLAND		19	-4
NETHERLANDS		13	=
SLOVAKIA		19	-4

Uncivil and dangerous behaviour of car drivers

Focus on phone use whilst driving (3/5)

Do you ever do the following when you are driving?

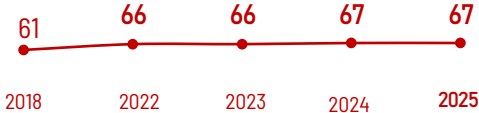
 Base: Drivers



67% make a phone call whilst driving

(=/2024)

(43% regularly, -1/2024)
whether with a Bluetooth s



77% use their phone and/or GPS whilst driving (=/2024)

whether to make a phone call, send messages, warn other drivers of an incident via an app, watch a video, attend meetings or enter a route

51% often (=/2024)

BREAKDOWN BY COUNTRY	% MAKE A PHONE CALL WHILST DRIVING			% USE THEIR PHONE / GPS WHILE DRIVING		
	2025	Change on 2024		2025	Change on 2024	
TOTAL	67	=		77	=	
FRANCE 	61	-4		75	-3	
GERMANY 	62	=		77	+1	
BELGIUM 	66	=		77	=	
SPAIN 	58	-1		65	-2	
UK 	58	+4		72	+2	
ITALY 	71	+3		78	+4	
SWEDEN 	80	=		83	-2	
GREECE 	72	=		82	+1	
POLAND 	71	=		82	+1	
NETHERLANDS 	67	-1		77	-1	
SLOVAKIA 	74	+3		83	+3	

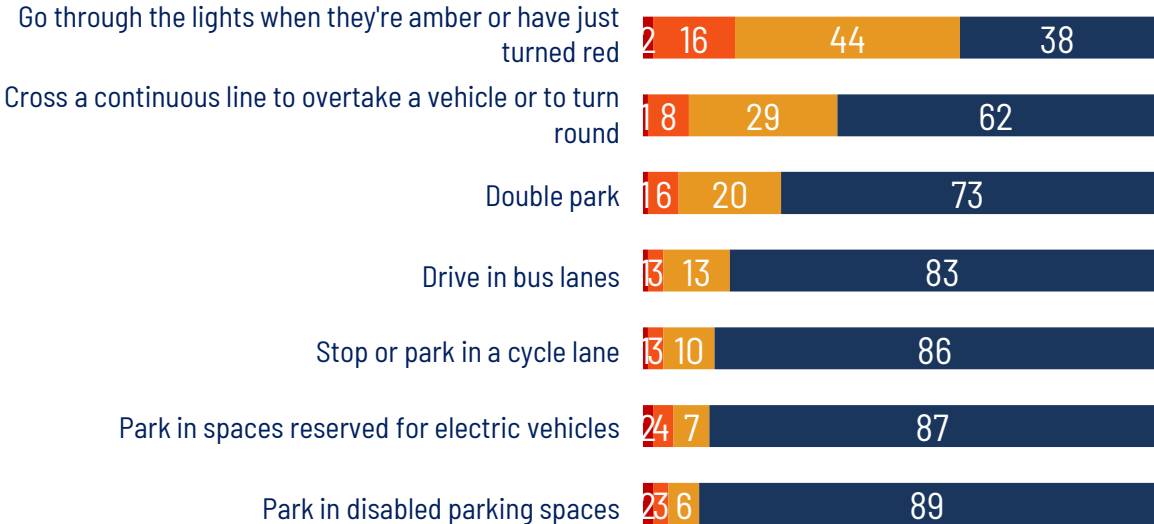
Uncivil and dangerous behaviour by car drivers towards other road users (4/5)

Do you ever do the following when you are driving?

 Base: Drivers

■ OFTEN ■ SOMETIMES ■ RARELY ■ NEVER

% DO SO	Previous figures 2024	Previous figures 2023	Previous figures 2022	Previous figures 2021
62	64	63	65	62
38	39	41	42	37
27	29	32	29	28
17	19	21	20	Not asked
14	15	18	17	18
13	13	15	12	Not asked
11	12	14	12	Not asked



Uncivil and dangerous behaviour by car drivers towards other road users - Breakdown by country (5/5)

Do you ever do the following when you are driving?

 Base: Drivers

	% DO SO OFTEN + SOMETIMES + RARELY	Go through the lights when they're amber or have just turned red		Cross a continuous line to overtake a vehicle or to turn round		Double park		Drive in bus lanes		Stop or park in a cycle lane		Park in spaces reserved for electric vehicles		Park in disabled parking spaces	
		2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024	2025	Change on 2024
TOTAL		62	-2	38	-1	27	-2	17	-2	14	-1	13	=	11	-1
FRANCE 		67	-1	32	-1	22	-3	10	-3	10	-2	9	-2	8	-3
GERMANY 		62	-2	43	-4	21	-1	15	-4	15	-2	11	-2	10	-1
BELGIUM 		62	-2	34	+1	22	-4	25	+1	19	-3	14	+1	9	-2
SPAIN 		58	-7	27	-2	55	+1	16	-3	11	-2	12	+1	14	=
UK 		61	+2	29	=	20	=	17	-2	16	=	16	-1	18	-3
ITALY 		51	=	44	-1	31	-1	14	-3	13	+2	12	-1	11	=
SWEDEN 		65	-7	38	=	19	=	20	+1	14	-1	19	+1	10	=
GREECE 		67	=	60	-5	42	-7	28	-7	15	-1	13	-3	9	-2
POLAND 		59	=	49	-1	19	-2	19	=	13	-2	10	-1	13	+1
NETHERLANDS 		73	+2	25	=	13	-1	6	-2	18	-2	15	+2	7	=
SLOVAKIA 		61	+1	38	-2	34	-1	16	-1	11	+1	8	=	10	-2

Car drivers' fear of other road users' behaviour

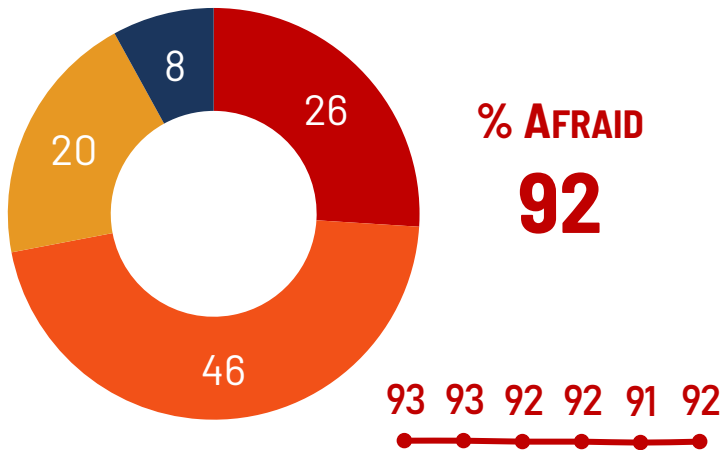
Do you frequently, sometimes, rarely, or never do the following when you are driving your vehicle?

 Base: Drivers

Fear dangerous behaviour of other road users (bikes, scooters, pedestrians, cars, lorries, buses, coaches, motorised two-wheeled vehicles etc.)

% AFRAID*
*FREQUENTLY + SOMETIMES + RARELY

FREQUENTLY **SOMETIMES** **RARELY** **NEVER**



2020 2021 2022 2023 2024 2025

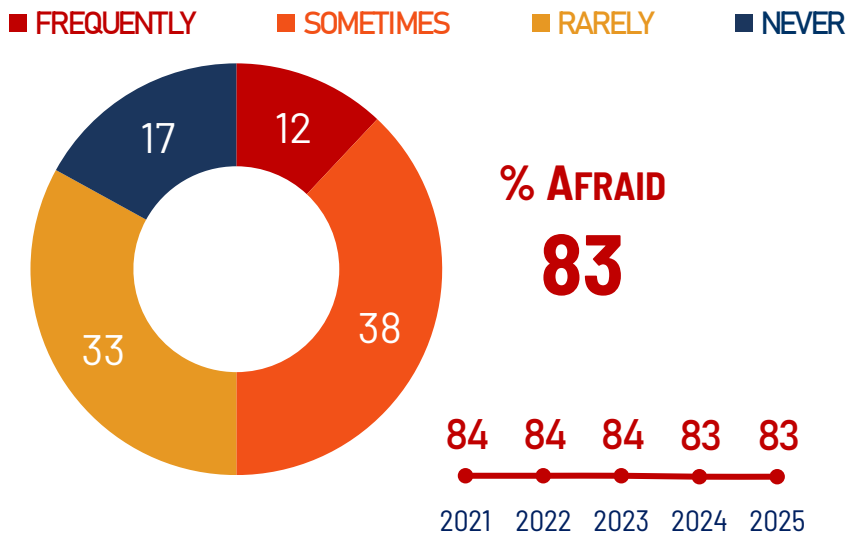
	2025	Change on 2024	Of which Frequently	Change on 2024
TOTAL	92	+1	26	=
FRANCE 	95	=	38	+2
GERMANY 	87	+4	11	-2
BELGIUM 	92	-1	26	-1
SPAIN 	88	-1	33	+1
UK 	91	=	22	=
ITALY 	96	+1	38	=
SWEDEN 	95	-1	25	+2
GREECE 	91	=	26	-6
POLAND 	92	-1	25	-1
NETHERLANDS 	87	+3	11	-1
SLOVAKIA 	92	+2	22	+3

Fear of another driver's aggressive behaviour

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

🚗 Base: Drivers

Feel afraid because of the aggressive behaviour of another driver



% AFRAID*		2025	Change on 2024	Of which Frequently	Change on 2024
*FREQUENTLY + SOMETIMES + RARELY					
TOTAL		83	=	12	=
FRANCE		87	-1	16	+2
GERMANY		76	+4	7	+1
BELGIUM		83	=	10	-1
SPAIN		87	-1	13	-1
UK		82	+2	9	+1
ITALY		88	=	16	-1
SWEDEN		85	-1	10	+1
GREECE		89	+2	17	-1
POLAND		81	=	9	-2
NETHERLANDS		70	-1	5	=
SLOVAKIA		84	+1	13	-1

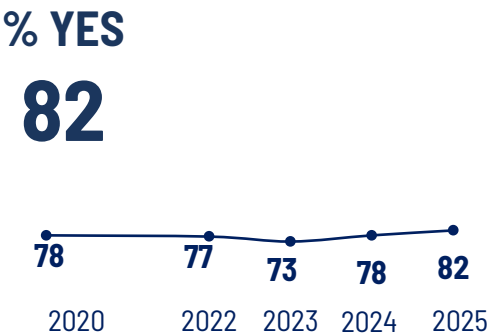
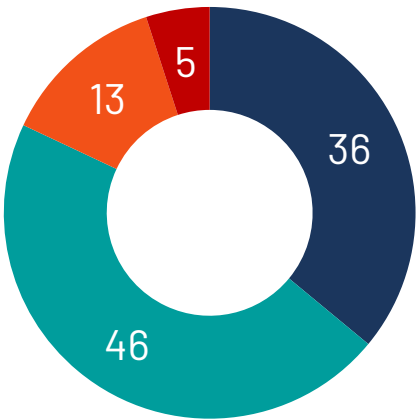
The impact of using different modes of travel on driving

You said that you travel at least occasionally using a means of transport other than a car. Does this have an effect on your behaviour resulting in...

  Base: Drivers who said they travel by two-wheel vehicle, bicycle, scooter, etc. (in addition to car)

Greater awareness of other road users when you drive your car

■ YES, DEFINITELY ■ YES, SOMEWHAT ■ NO, NOT REALLY ■ NO, NOT AT ALL



	% YES	2025	Change on 2024
TOTAL	82	82	+4
FRANCE	86	86	=
GERMANY	76	76	+6
BELGIUM	83	83	-1
SPAIN	85	85	+2
UK	81	81	+5
ITALY	87	87	+4
SWEDEN	84	84	+5
GREECE	90	90	+3
POLAND	71	71	+3
NETHERLANDS	68	68	+8
SLOVAKIA	93	93	+5

APPENDICES

OUR COMMITMENT



PROFESSIONAL CODES, QUALITY CERTIFICATION AND DATA PROTECTION

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- **SYNTEC** (www.syntec-etudes.com), French Union of Market Research companies
- **ESOMAR** (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.



Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.



- This project was carried out in accordance with these international Codes and Quality standards

RELIABILITY OF RESULTS :

Self completion online surveys IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

Sample : structure and representativeness

Questionnaire : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**

Data collection : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

Sampling : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

Fieldwork monitoring : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).

In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

RELIABILITY OF RESULTS

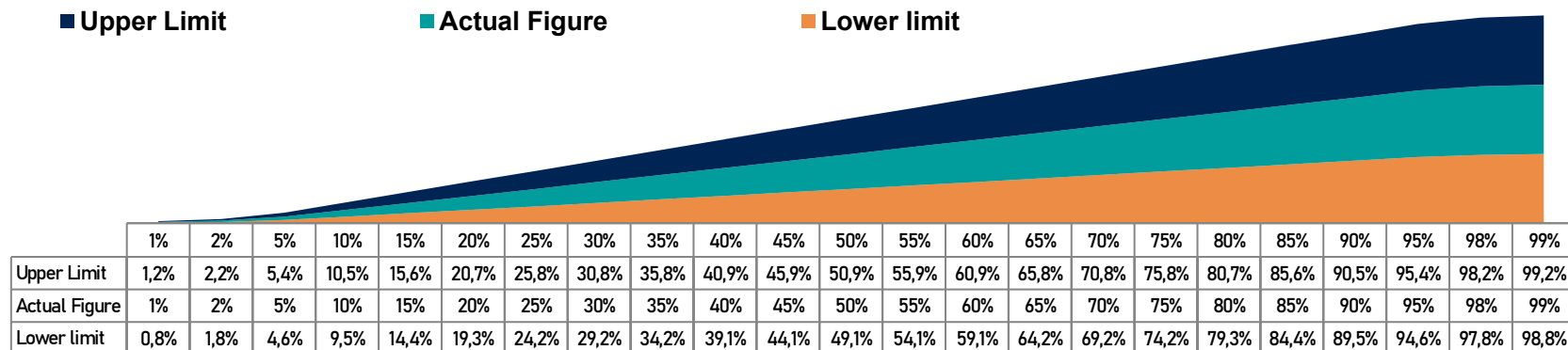
Spreadsheet

IN THIS INSTANCE, WITH REGARD TO THIS STUDY:

Confidence interval: **95%**

Size of sample: **12 403**

THE PROPORTIONS OBSERVED ARE BETWEEN :



ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

You act better when you are sure.