

# SHARING THE ROAD

## *Europeans and responsible driving 2022 Edition - PART 2*

YOUR CONTACTS IPSOS FRANCE

Etienne Mercier  
etienne.mercier@ipsos.com

Amandine Lama  
amandine.lama@ipsos.com

**VINCI**  
AUTOROUTES

**FONDATION**  
Pour une conduite responsable

GAME CHANGERS



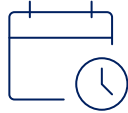
# TECHNICAL SPECIFICATIONS



## SAMPLE

**12,400 Europeans** aged 16 and over, including at least 1,000 people in each of the countries surveyed.

In the overall results, each of the 11 countries has the same weight.



## FIELD DATES

From **5 to 31 March 2022**.

### Survey conducted for



FONDATION  
Pour une conduite responsable



## METHOD

**Online** survey.

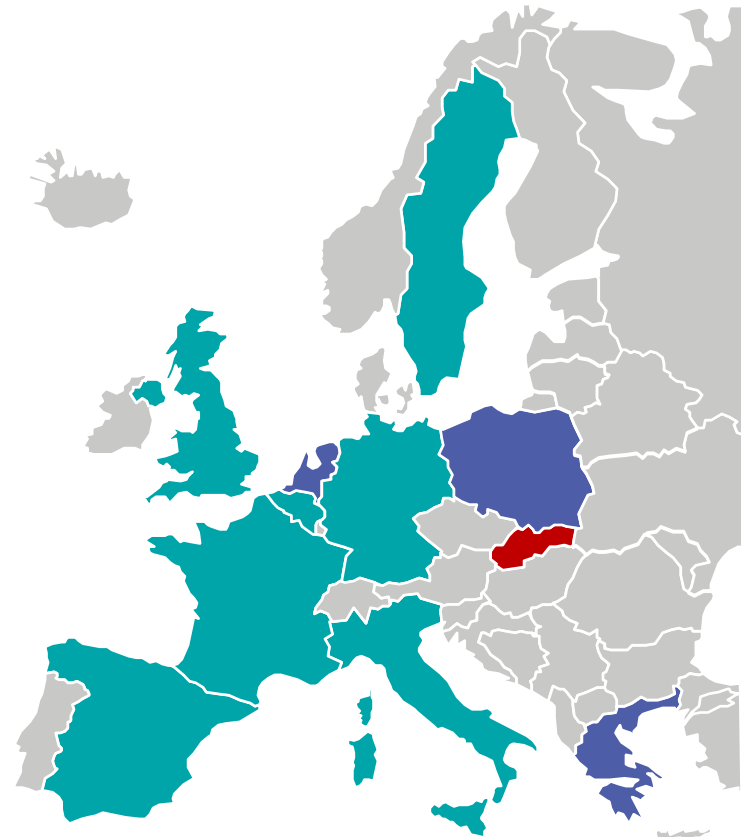
Samples representative of the population of each country in terms of gender, age, occupation of the interviewee, region and category of urban area.






This report has been prepared in accordance with the international standard ISO 20252 "Market, social and opinion research". *This report was reviewed by Amandine Lama, Client Director.*

# Countries surveyed

Samples	
Total	12,400 respondents
France	2,400 respondents
Germany	1,000 respondents
Belgium	1,000 respondents
Spain	1,000 respondents
United Kingdom	1,000 respondents
Italy	1,000 respondents
Sweden	1,000 respondents
Greece	1,000 respondents
Poland	1,000 respondents
Netherlands	1,000 respondents
<b>Slovakia</b>	<b>1,000 respondents</b>

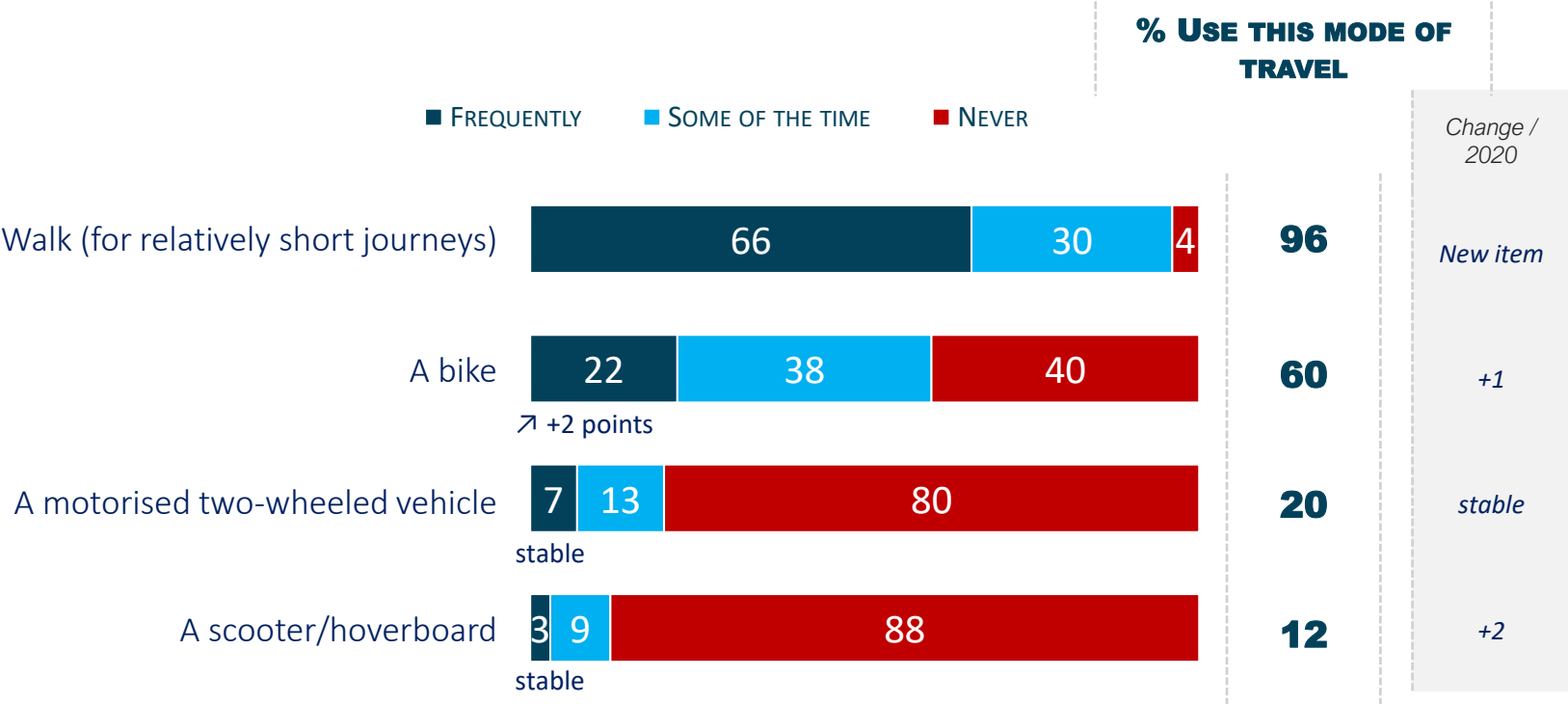


-  Countries surveyed since 2014
-  Countries surveyed since 2015
-  Country surveyed since 2016



# RESULTS

# Pedestrians, bicycles, motorised two-wheelers and scooters/hoverboards



Base: All

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

# Pedestrians, bicycles, motorised two-wheelers and scooters/hoverboards- Details by country

## % FREQUENTLY

	Walk (for relatively short journeys)		A bike		A motorised two-wheeled vehicle		A scooter/hoverboard	
	2022	Change / 2020	2022	Change / 2020	2022	Change / 2020	2022	Change / 2020
<b>TOTAL</b>	<b>66</b>		<b>22</b>	+2	<b>7</b>	=	<b>3</b>	=
FRANCE	59		13	+2	5	+1	5	+2
GERMANY	70		25	=	2	-1	3	=
BELGIUM	51		26	=	4	-1	2	-1
SPAIN	77		7	-1	6	-3	3	=
UNITED KINGDOM	61		8	=	7	+3	3	+1
ITALY	66		20	+9	10	+3	3	+1
SWEDEN	61		23	+3	4	=	5	+3
GREECE	76		14	+3	12	=	6	=
POLAND	67		25	-4	13	-3	3	=
NETHERLANDS	73		60	+4	11	+1	1	-1
SLOVAKIA	68		20	=	4	+1	4	+2

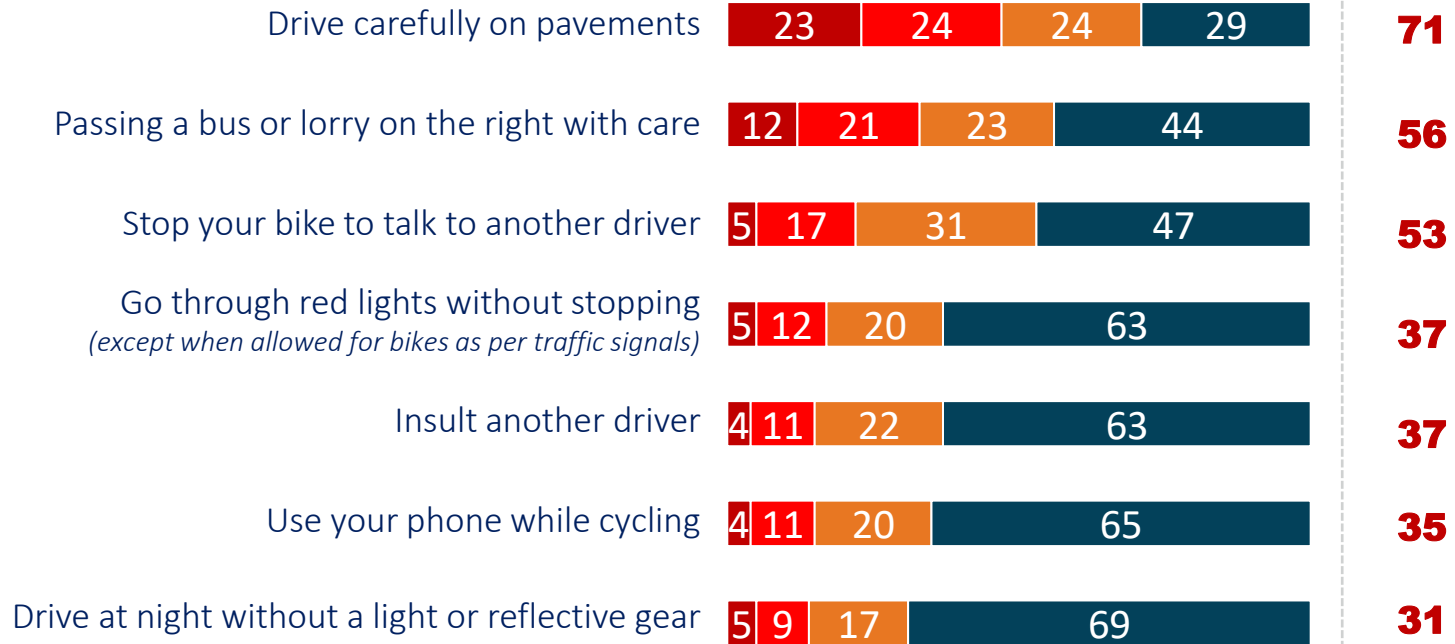


Base: All

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

# Incivilities and dangerous behaviour when cycling

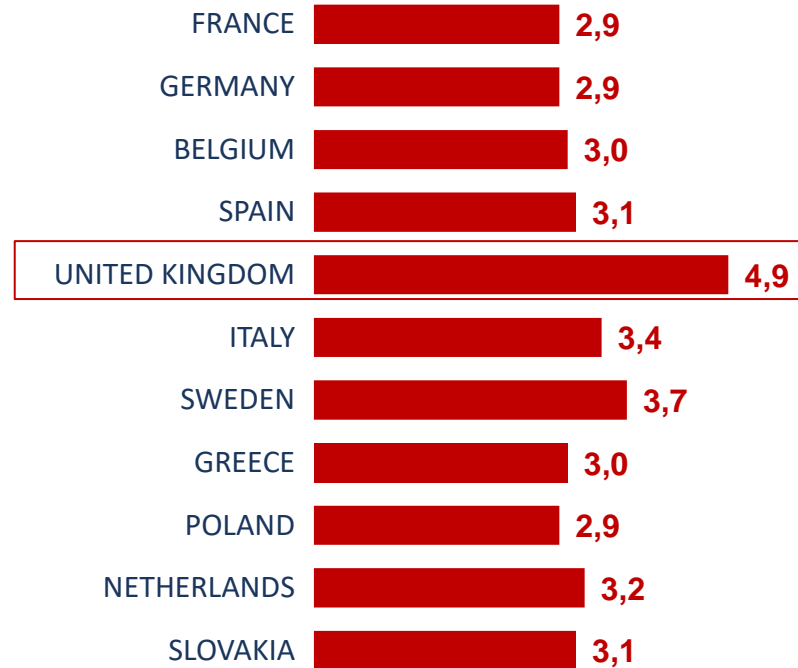
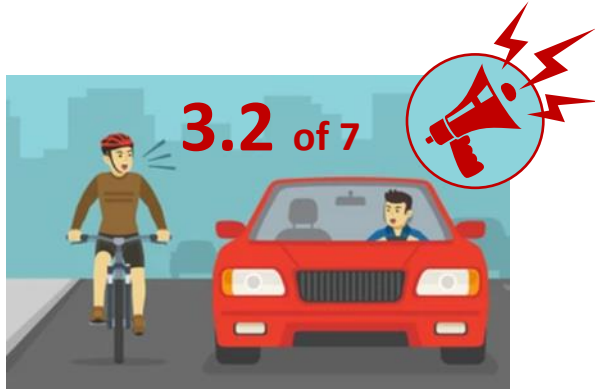
■ FREQUENTLY ■ OCCASIONALLY ■ RARELY ■ JAMAIS



Base: Those who frequently use a bike (22% of the sample)  
When using a bike, do you do the following things?

# Average number of uncivil and dangerous cycling behaviours by country

## AVERAGE NUMBER OF OF UNCIVIL BEHAVIOUR



Base: Those who frequently use a bike (22% of the sample)

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



# Incivilities and dangerous behaviour when cycling

## % DO IT\*\*

\*\*FREQUENTLY + SOMETIMES + RARELY

*\*New items*

	DRIVE CAREFULLY ON PAVEMENTS*	PASSING A BUS OR LORRY ON THE RIGHT WITH CARE*	STOP YOUR BIKE TO TALK TO ANOTHER DRIVER*	INSULT ANOTHER DRIVER	2022	Change / 2020	GO THROUGH RED LIGHTS WITHOUT STOPPING* (EXCEPT WHEN ALLOWED FOR BIKES AS PER TRAFFIC SIGNALS)	USE YOUR PHONE WHILE CYCLING*	DRIVE AT NIGHT WITHOUT A LIGHT OR REFLECTIVE GEAR*
<b>TOTAL</b>	<b>71</b>	<b>56</b>	<b>53</b>	<b>37</b>	<b>37</b>	=	<b>37</b>	<b>35</b>	<b>31</b>
FRANCE	<b>56</b>	<b>38</b>	<b>38</b>	<b>52</b>	<b>52</b>	-5	<b>38</b>	<b>32</b>	<b>32</b>
GERMANY	<b>74</b>	<b>48</b>	<b>32</b>	<b>42</b>	<b>42</b>	-12	<b>37</b>	<b>25</b>	<b>29</b>
BELGIUM	<b>62</b>	<b>66</b>	<b>57</b>	<b>39</b>	<b>39</b>	-5	<b>25</b>	<b>31</b>	<b>21</b>
SPAIN	<b>66</b>	<b>48</b>	<b>49</b>	<b>46</b>	<b>46</b>	+1	<b>45</b>	<b>33</b>	<b>22</b>
UNITED KINGDOM	<b>82</b>	<b>87</b>	<b>71</b>	<b>66</b>	<b>66</b>	+18	<b>64</b>	<b>61</b>	<b>60</b>
ITALY	<b>63</b>	<b>46</b>	<b>68</b>	<b>45</b>	<b>45</b>	-9	<b>37</b>	<b>36</b>	<b>41</b>
SWEDEN	<b>80</b>	<b>62</b>	<b>56</b>	<b>32</b>	<b>32</b>	=	<b>48</b>	<b>44</b>	<b>45</b>
GREECE	<b>69</b>	<b>44</b>	<b>61</b>	<b>38</b>	<b>38</b>	+27	<b>27</b>	<b>32</b>	<b>27</b>
POLAND	<b>82</b>	<b>56</b>	<b>48</b>	<b>23</b>	<b>23</b>	-3	<b>24</b>	<b>33</b>	<b>26</b>
NETHERLANDS	<b>67</b>	<b>60</b>	<b>52</b>	<b>31</b>	<b>31</b>	-11	<b>47</b>	<b>36</b>	<b>30</b>
SLOVAKIA	<b>86</b>	<b>55</b>	<b>54</b>	<b>36</b>	<b>36</b>	+30	<b>23</b>	<b>33</b>	<b>24</b>



Base: Those who frequently use a bike (22% of the sample)

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

# Cyclists' fear of other road users' behaviour

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER

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



**% YES**

**90**

Change / 2020

+3

Fear for your safety/the safety of your children



**80**

New item

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



**81**

+4



Base: Those who frequently use a bike (22% of the sample)

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



# Cyclists' fear of other road users' behaviour

**% YES\***

\*FREQUENTLY + SOMETIMES + RARELY

	FEAR DANGEROUS BEHAVIOUR FROM OTHER ROAD USERS		FEAR FOR YOUR SAFETY/THE SAFETY OF YOUR CHILDREN*		FEAR AGGRESSIVE BEHAVIOUR OF MOTORISED ROAD USERS	
	2022	Change / 2020	2022		2022	Change / 2020
<b>TOTAL</b>	<b>90</b>	<b>+3</b>	<b>80</b>		<b>81</b>	<b>+4</b>
FRANCE	<b>92</b>	<b>+5</b>	<b>91</b>		<b>82</b>	<b>+1</b>
GERMANY	<b>88</b>	<b>+2</b>	<b>69</b>		<b>83</b>	<b>+5</b>
BELGIUM	<b>92</b>	<b>+5</b>	<b>87</b>		<b>82</b>	<b>-2</b>
SPAIN	<b>86</b>	<b>-3</b>	<b>86</b>		<b>81</b>	<b>+3</b>
UNITED KINGDOM	<b>94</b>	<b>+7</b>	<b>88</b>		<b>88</b>	<b>+8</b>
ITALY	<b>90</b>	<b>-5</b>	<b>86</b>		<b>87</b>	<b>-1</b>
SWEDEN	<b>94</b>	<b>+2</b>	<b>87</b>		<b>85</b>	<b>+7</b>
GREECE	<b>89</b>	<b>-1</b>	<b>89</b>		<b>80</b>	<b>-7</b>
POLAND	<b>93</b>	<b>+10</b>	<b>90</b>		<b>86</b>	<b>+8</b>
NETHERLANDS	<b>84</b>	<b>+1</b>	<b>66</b>		<b>71</b>	<b>+6</b>
SLOVAKIA	<b>95</b>	<b>+3</b>	<b>88</b>		<b>90</b>	<b>+2</b>

\*new item



Base: Those who frequently use a bike (22% of the sample)

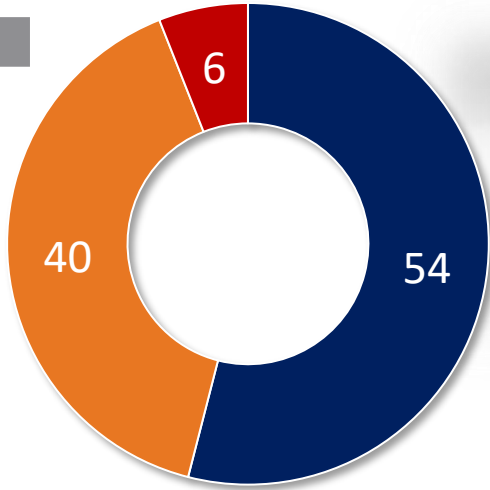
When using a bike, do you do the following things?

# Cyclists and "blind spots"

- YES, DEFINITELY
- YES, BUT I'M NOT SURE
- NO, NOT REALLY

**% NOT SURE**  
**46**

*New question*



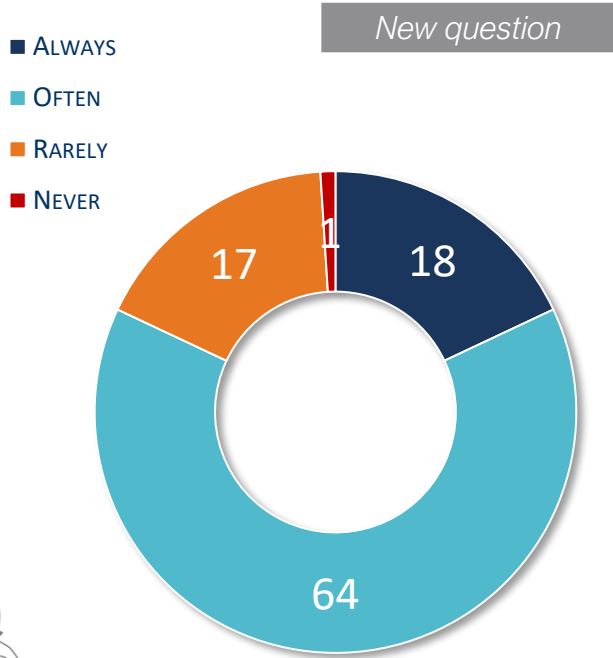
Base: Those who frequently use a bike (22% of the sample)

*When you travel by bike, do you know where you are visible to other drivers and where they can't see you because you are in their blind spot?*

## BREAKDOWN BY COUNTRY % NOT SURE

Country	2022 % Not Sure
FRANCE	53
GERMANY	50
BELGIUM	49
SPAIN	37
UNITED KINGDOM	34
ITALY	38
SWEDEN	50
GREECE	41
POLAND	45
NETHERLANDS	41
SLOVAKIA	63

# The feeling of safety when cycling



Base: Those who frequently use a bike (22% of the sample)

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

**% ALWAYS/OFTEN**  
**82**

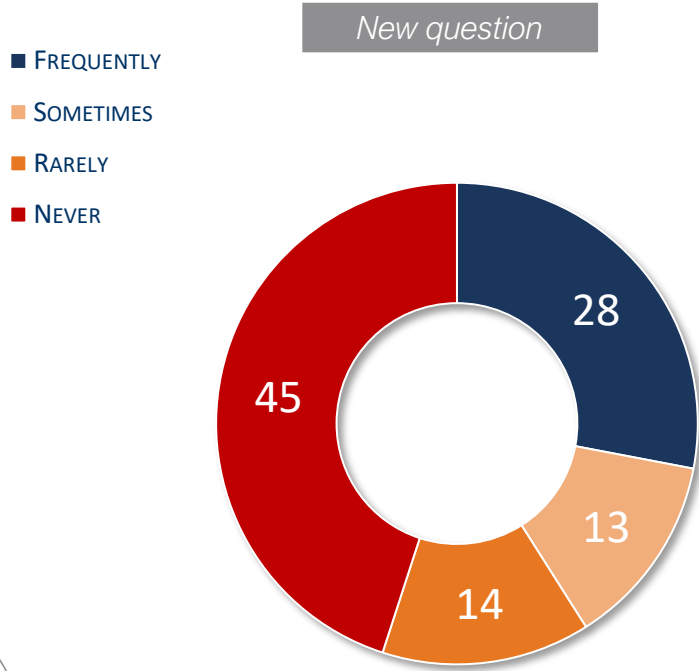
**% RARELY/NEVER**  
**18**

*% Rural areas: 15*  
*% large cities: 20*

## BREAKDOWN BY COUNTRY % ALWAYS/OFTEN 2022

FRANCE	60
GERMANY	85
BELGIUM	75
SPAIN	78
UNITED KINGDOM	90
ITALY	69
SWEDEN	91
GREECE	75
POLAND	78
NETHERLANDS	96
SLOVAKIA	69

# Wearing a helmet when cycling



Base: Those who frequently use a bike (22% of the sample)

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

## BREAKDOWN BY COUNTRY

2022

% NOT FREQUENTLY

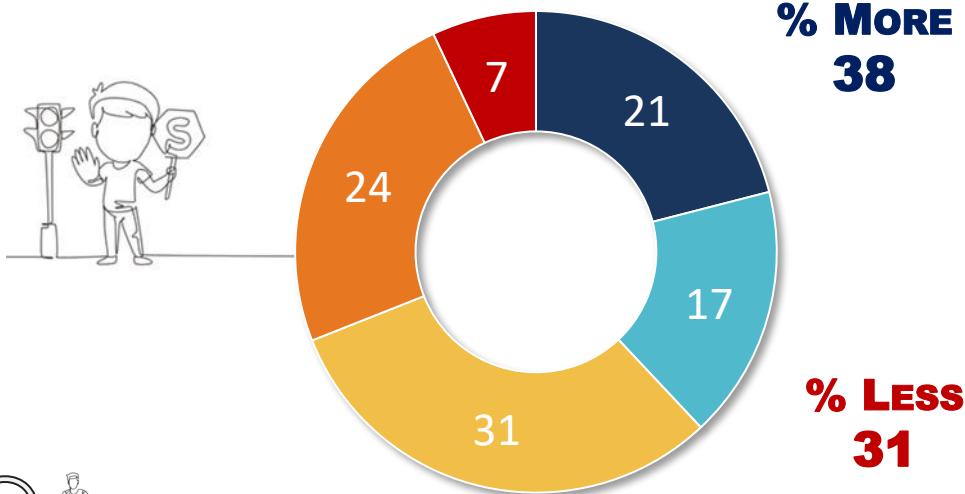
FRANCE	55
GERMANY	64
BELGIUM	76
SPAIN	33
UNITED KINGDOM	50
ITALY	70
SWEDEN	65
GREECE	58
POLAND	70
NETHERLANDS	95
SLOVAKIA	69

**% NOT FREQUENTLY**  
**72**

# Respect for signs by bike vs. by car

## *You follow road signs and lights...*

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



*New question*

Base: To those who frequently use a bicycle and drive a car

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

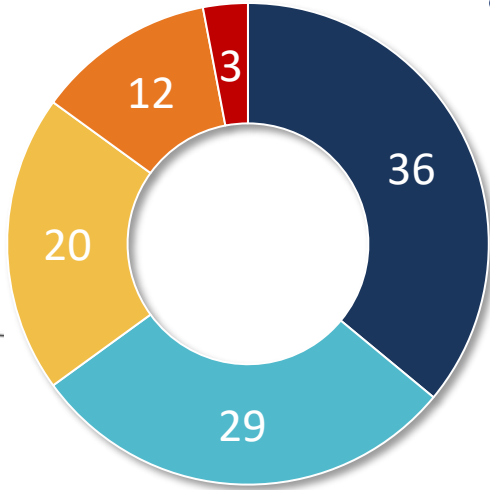
## BREAKDOWN BY COUNTRY 2022

	% MORE	% LESS
FRANCE	42	27
GERMANY	29	34
BELGIUM	26	26
SPAIN	64	20
UNITED KINGDOM	63	24
ITALY	67	26
SWEDEN	29	35
GREECE	71	12
POLAND	50	22
NETHERLANDS	17	43
SLOVAKIA	45	32

# The need for attention by bicycle vs. by car

## You have to take care...

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



**% MORE  
65**

**% LESS  
15**

*New question*

Base: To those who frequently use a bicycle and drive a car

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

## BREAKDOWN BY COUNTRY 2022

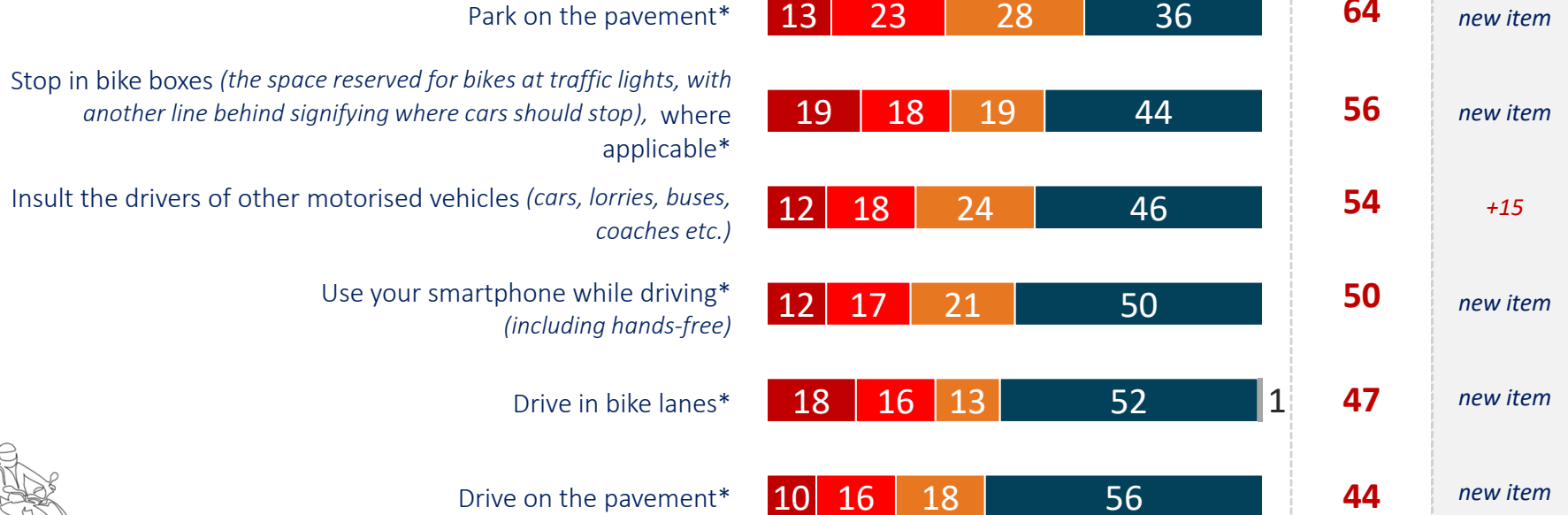
	% MORE	% LESS
FRANCE	77	11
GERMANY	75	11
BELGIUM	60	13
SPAIN	90	6
UNITED KINGDOM	83	15
ITALY	85	11
SWEDEN	59	18
GREECE	83	12
POLAND	72	10
NETHERLANDS	42	21
SLOVAKIA	62	24



# Incivilities and dangerous behaviour on motorised two-wheelers

\*New items

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER ■ DON'T KNOW



Base: To those who frequently use a two-wheeler (7% of the sample)  
While driving a motorised two-wheeled vehicle, do you do the following things?

# Incivilities and dangerous behaviour on motorised two-wheelers

**% DO IT\*\***

\*\*FREQUENTLY + SOMETIMES + RARELY

*\*New items*

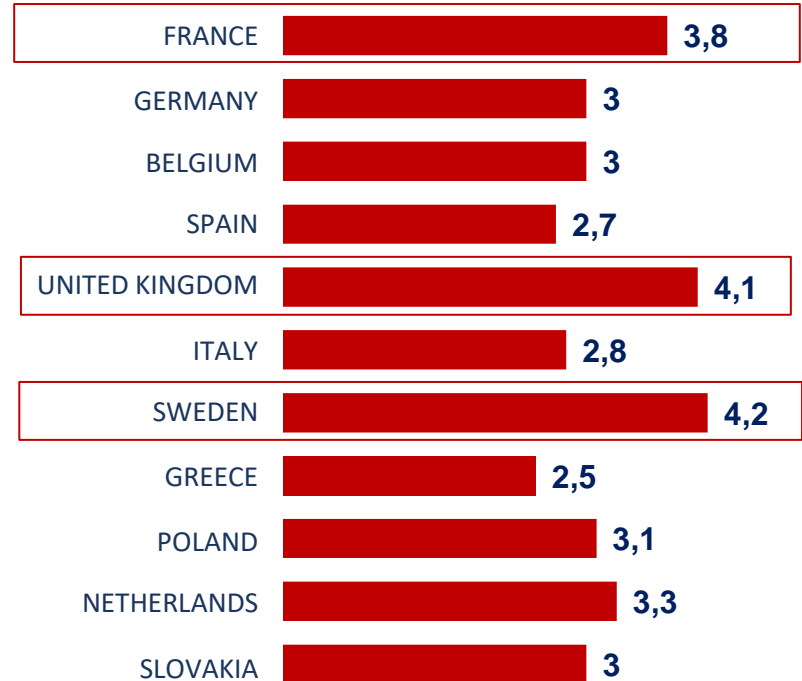
	PARK ON THE PAVEMENT*	STOP IN BIKE BOXES, WHERE APPLICABLE*	INSULT THE DRIVERS OF OTHER MOTORISED VEHICLES	USE YOUR SMARTPHONE WHILE DRIVING*	DRIVE IN BIKE LANES*	DRIVE ON THE PAVEMENT*	
			2022	Change / 2020			
<b>TOTAL</b>	<b>64</b>	<b>56</b>	<b>54</b>	<b>+15</b>	<b>50</b>	<b>47</b>	<b>44</b>
FRANCE	<b>70</b>	<b>66</b>	<b>75</b>	<b>+15</b>	<b>60</b>	<b>61</b>	<b>52</b>
GERMANY	<b>84</b>	<b>45</b>	<b>46</b>	<b>-11</b>	<b>48</b>	<b>39</b>	<b>42</b>
BELGIUM	<b>61</b>	<b>61</b>	<b>50</b>	<b>-5</b>	<b>34</b>	<b>53</b>	<b>36</b>
SPAIN	<b>57</b>	<b>42</b>	<b>54</b>	<b>+9</b>	<b>45</b>	<b>37</b>	<b>36</b>
UNITED KINGDOM	<b>80</b>	<b>69</b>	<b>68</b>	<b>+22</b>	<b>62</b>	<b>68</b>	<b>63</b>
ITALY	<b>51</b>	<b>53</b>	<b>54</b>	<b>-1</b>	<b>49</b>	<b>38</b>	<b>31</b>
SWEDEN	<b>67</b>	<b>69</b>	<b>78</b>	<b>+43</b>	<b>75</b>	<b>67</b>	<b>68</b>
GREECE	<b>63</b>	<b>49</b>	<b>42</b>	<b>+28</b>	<b>39</b>	<b>23</b>	<b>34</b>
POLAND	<b>62</b>	<b>51</b>	<b>45</b>	<b>+9</b>	<b>61</b>	<b>48</b>	<b>47</b>
NETHERLANDS	<b>65</b>	<b>60</b>	<b>55</b>	<b>+8</b>	<b>38</b>	<b>61</b>	<b>49</b>
SLOVAKIA	<b>57</b>	<b>65</b>	<b>38</b>	<b>+29</b>	<b>43</b>	<b>46</b>	<b>47</b>



Base: To those who frequently use a two-wheeler (7% of the sample)  
While driving a motorised two-wheeled vehicle, do you do the following things?

# Average number of uncivil and dangerous behaviours by country

## AVERAGE NUMBER OF OF UNCIVIL BEHAVIOUR



Base: To those who frequently use a two-wheeler (7% of the sample)  
While driving a motorised two-wheeled vehicle, do you do the following things?

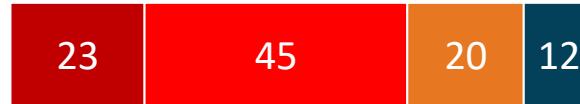
# Fear of motorised two-wheelers in relation to the behaviour of other road users

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER

**% YES**

Change / 2020

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



**88**

**+4**

Fear aggressive behaviour from drivers of other motorised vehicles  
(cars, lorries, buses, coaches etc.)



**84**

**+8**



Base: To those who frequently use a two-wheeler (7% of the sample)  
While driving a motorised two-wheeled vehicle, do you do the following things?

# The fear of motorised two-wheelers in relation to the behaviour of other road users

**% YES\***

\*FREQUENTLY + SOMETIMES + RARELY

FEAR DANGEROUS BEHAVIOUR  
OF OTHER ROAD USERS

	2022	Change / 2020
<b>TOTAL</b>	<b>88</b>	<b>+4</b>
FRANCE	84	-5
GERMANY	92	+10
BELGIUM	85	-4
SPAIN	83	-5
UNITED KINGDOM	84	+10
ITALY	86	-4
SWEDEN	96	+9
GREECE	98	+6
POLAND	92	+15
NETHERLANDS	81	+5
SLOVAKIA	93	+11

FEAR AGGRESSIVE BEHAVIOUR FROM DRIVERS  
OF OTHER MOTORIZED VEHICLES

	2022	Change / 2020
<b>TOTAL</b>	<b>84</b>	<b>+8</b>
FRANCE	85	+2
GERMANY	82	+8
BELGIUM	81	+1
SPAIN	76	-4
UNITED KINGDOM	91	+18
ITALY	88	+4
SWEDEN	89	+23
GREECE	88	+4
POLAND	89	+17
NETHERLANDS	67	+5
SLOVAKIA	93	+20



Base: To those who frequently use a two-wheeler (7% of the sample)  
While driving a motorised two-wheeled vehicle, do you do the following things?

# Incivilities and dangerous behaviour on foot and fear of other road users

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER

\*New item

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



**% YES**

**90**

Change / 2020

-1

Bikes/scooters/hoverboards brushing you on the pavement



**63**

-1

Crossing where there is no pedestrian crossing



**% DO IT**

**87**

=

You use your phone while walking without properly paying attention to what's around you\*



**58**

new item

Crossing a pedestrian crossing when the red man is showing



**56**

-3

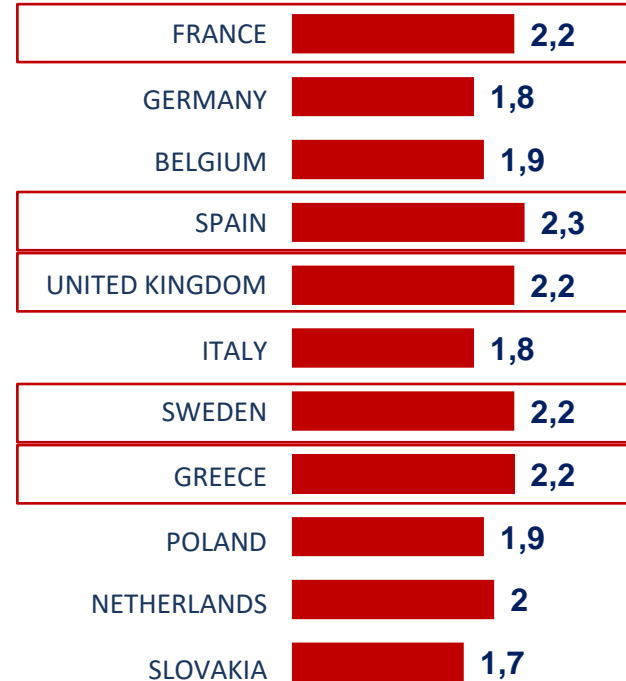
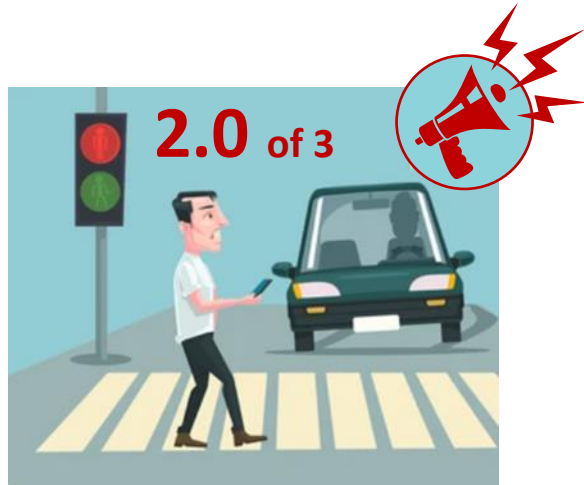


Base: All

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

# Average number of uncivil and dangerous pedestrian behaviours by country

## AVERAGE NUMBER OF OF UNCIVIL BEHAVIOUR



Base: All

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

# Incivilities and dangerous behaviour on foot

**% DO IT\*\***

\*New item

	CROSSING WHERE THERE IS NO PEDESTRIAN CROSSING		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	
	2022	Change / 2020	2022	Change / 2020	2022	Change / 2020
<b>TOTAL</b>	<b>87</b>	=	<b>58</b>		<b>56</b>	-3
FRANCE	<b>86</b>	=	<b>59</b>		<b>70</b>	-1
GERMANY	<b>87</b>	-1	<b>47</b>		<b>49</b>	-1
BELGIUM	<b>90</b>	=	<b>54</b>		<b>47</b>	-3
SPAIN	<b>89</b>	+1	<b>69</b>		<b>76</b>	+2
UNITED KINGDOM	<b>93</b>	-3	<b>57</b>		<b>66</b>	-6
ITALY	<b>79</b>	-3	<b>57</b>		<b>40</b>	-1
SWEDEN	<b>89</b>	=	<b>58</b>		<b>72</b>	-3
GREECE	<b>92</b>	-1	<b>67</b>		<b>66</b>	-4
POLAND	<b>87</b>	=	<b>58</b>		<b>44</b>	-5
NETHERLANDS	<b>81</b>	=	<b>57</b>		<b>57</b>	-4
SLOVAKIA	<b>82</b>	=	<b>54</b>		<b>33</b>	-2



Base: All

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

\*\*FREQUENTLY + SOMETIMES + RARELY



# Fear of other road users as a pedestrian

**% YES\*\***

\*New item

	MOTORISTS NOT STOPPING TO LET YOU CROSS WHEN YOU ARE ALREADY ON A PEDESTRIAN CROSSING		BIKES/SCOOTERS/HOVERBOARDS BRUSHING YOU ON THE PAVEMENT	
	2022	Change / 2020	2022	Change / 2020
<b>TOTAL</b>	<b>90</b>	-1	<b>63</b>	-1
FRANCE	<b>94</b>	+1	<b>78</b>	+2
GERMANY	<b>83</b>	-4	<b>50</b>	-39
BELGIUM	<b>93</b>	=	<b>79</b>	=
SPAIN	<b>95</b>	-1	<b>65</b>	-9
UNITED KINGDOM	<b>84</b>	-6	<b>68</b>	+15
ITALY	<b>91</b>	-2	<b>68</b>	=
SWEDEN	<b>90</b>	+2	<b>70</b>	+7
GREECE	<b>92</b>	-3	<b>88</b>	-2
POLAND	<b>90</b>	-3	<b>36</b>	-2
NETHERLANDS	<b>90</b>	=	<b>38</b>	-1
SLOVAKIA	<b>87</b>	=	<b>47</b>	+18



Base: All

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

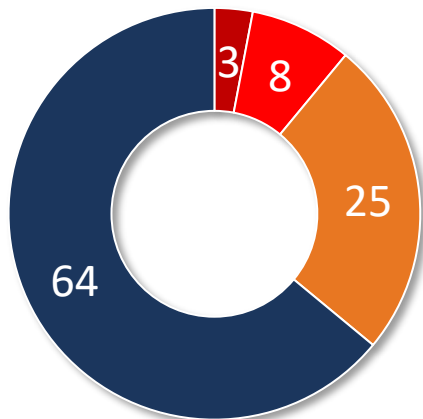
\*\*FREQUENTLY + SOMETIMES + RARELY

# Uncivil and dangerous behaviour of motorists towards other road users (1/5)

New question

## Open the door without checking if a cyclist is coming

■ OFTEN ■ SOMETIMES ■ RARELY ■ NEVER



**% DO IT**  
**36**

**% DO IT** OPEN THE DOOR WITHOUT CHECKING IF A CYCLIST IS COMING

	2022
<b>TOTAL</b>	<b>36</b>
FRANCE	<b>40</b>
GERMANY	<b>38</b>
BELGIUM	<b>38</b>
SPAIN	<b>32</b>
UNITED KINGDOM	<b>47</b>
ITALY	<b>33</b>
SWEDEN	<b>46</b>
GREECE	<b>26</b>
POLAND	<b>32</b>
NETHERLANDS	<b>35</b>
SLOVAKIA	<b>30</b>



Base: Drivers

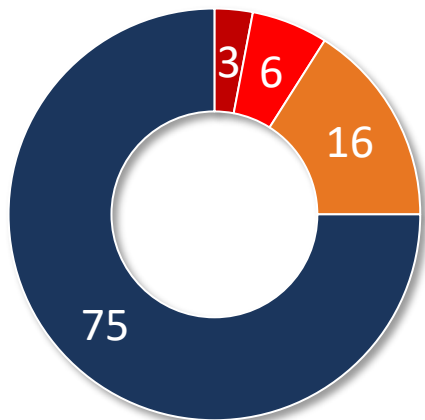
When driving, do you do the following things?

# Uncivil and dangerous behaviour of motorists towards other road users (2/5)

New question

## Encroach on bike boxes when stopped at a red light (...), where applicable

■ OFTEN ■ SOMETIMES ■ RARELY ■ NEVER



**% DO IT**  
**25**

**% DO IT** ENCROACH ON BIKE BOXES WHEN STOPPED AT A RED LIGHT (...), WHERE APPLICABLE

	2022
<b>TOTAL</b>	<b>25</b>
FRANCE	<b>32</b>
GERMANY	<b>33</b>
BELGIUM	<b>24</b>
SPAIN	<b>20</b>
UNITED KINGDOM	<b>30</b>
ITALY	<b>22</b>
SWEDEN	<b>27</b>
GREECE	<b>27</b>
POLAND	<b>23</b>
NETHERLANDS	<b>15</b>
SLOVAKIA	<b>25</b>



Base: Drivers

When driving, do you do the following things?

# Uncivil and dangerous behaviour of motorists towards other road users (3/5)

**66%** use the phone while driving (+5 vs 2018) (42% regularly) whether with a Bluetooth system, a hands-free kit, or without a hands-free kit



BREAKDOWN BY COUNTRY		% USE THE PHONE WHILE DRIVING 2022
FRANCE		61
GERMANY		59
BELGIUM		62
SPAIN		54
UNITED KINGDOM		58
ITALY		70
SWEDEN		75
GREECE		77
POLAND		72
NETHERLANDS		67
SLOVAKIA		72

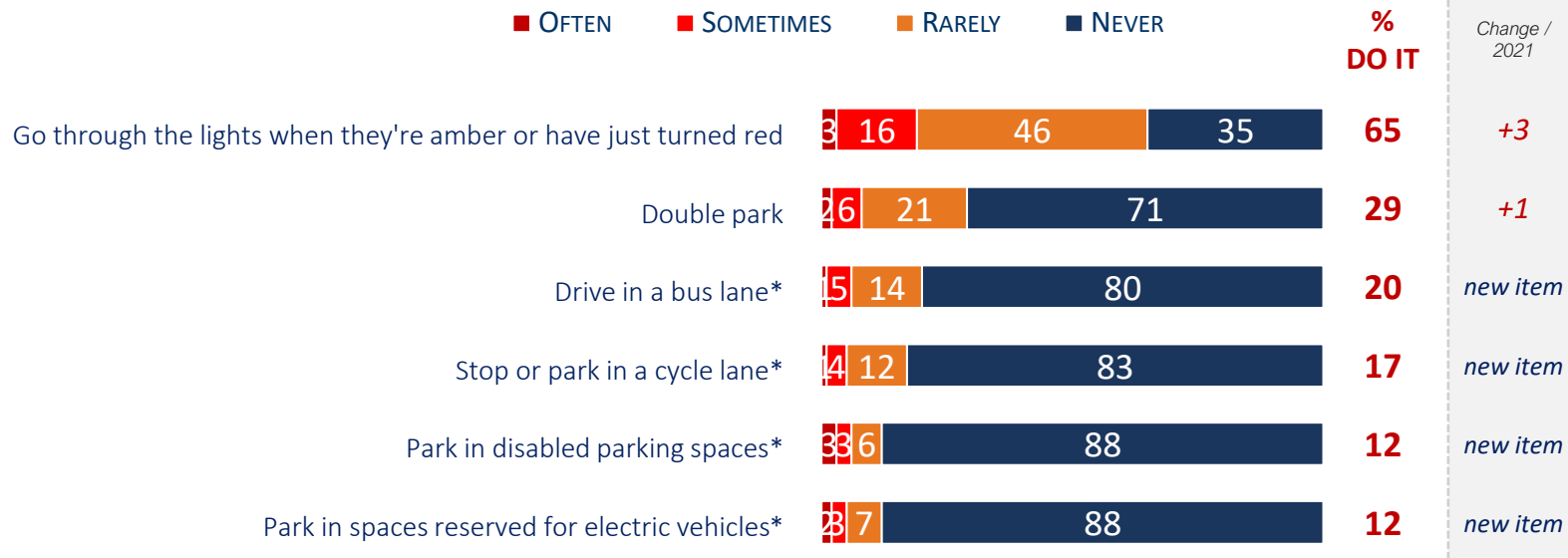


Base: Drivers

When driving, do you do the following things?

# Uncivil and dangerous behaviour of motorists towards other road users (4/5)

\*New items



Base: Drivers

When driving, do you do the following things?

# Uncivil and dangerous behaviour of motorists towards other road users (5/5) - Detail by country

## % DO IT

	GO THROUGH THE LIGHTS WHEN THEY'RE AMBER OR HAVE JUST TURNED RED		DOUBLE PARK		DRIVE IN BUS LANES*	STOP OR PARK IN A CYCLE LANE*	PARK IN DISABLED PARKING SPACES*	PARK IN SPACES RESERVED FOR ELECTRIC VEHICLES*
	2022	Change / 2021	2022	Change / 2021				
<b>TOTAL</b>	<b>65</b>	<b>+3</b>	<b>29</b>	<b>+1</b>	<b>20</b>	<b>17</b>	<b>12</b>	<b>12</b>
FRANCE	67	+2	27	+2	15	15	11	11
GERMANY	60	=	22	+1	18	18	11	10
BELGIUM	65	+3	22	-1	21	21	10	11
SPAIN	68	-1	54	-7	19	14	13	10
UNITED KINGDOM	65	+6	20	+5	18	17	20	13
ITALY	55	+5	35	+4	18	17	14	14
SWEDEN	70	+6	21	+5	20	17	13	16
GREECE	68	+1	50	+5	37	19	13	15
POLAND	64	+5	22	-1	21	14	14	13
NETHERLANDS	71	-1	15	-5	10	23	8	10
SLOVAKIA	58	+7	32	-1	17	11	12	7

\*new item



Base: Drivers

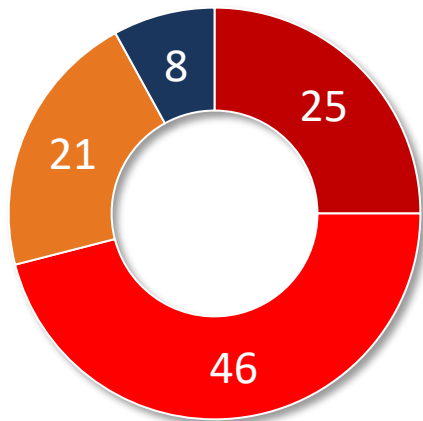
When driving, do you do the following things?

# Motorists' fear of other road users' behaviour

## Fear the risky behaviour of other road users\*\*

(bikes, scooters, pedestrians, motorised two-wheeled vehicles, buses, coaches, lorries etc.)

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER



**% YES**  
**92**

↘ -1 vs 2021

**% YES\***

\*FREQUENTLY + SOMETIMES + RARELY

Base: Drivers

FEAR THE RISKY BEHAVIOUR OF OTHER ROAD USERS\*\*

	2022	Change / 2021	Of which frequently	Change / 2021
<b>TOTAL</b>	<b>92</b>	-1	<b>25</b>	-3
FRANCE	<b>95</b>	-1	<b>36</b>	-2
GERMANY	<b>87</b>	=	<b>10</b>	-3
BELGIUM	<b>93</b>	=	<b>26</b>	-1
SPAIN	<b>89</b>	-7	<b>32</b>	-5
UNITED KINGDOM	<b>90</b>	-3	<b>23</b>	+3
ITALY	<b>96</b>	=	<b>39</b>	-6
SWEDEN	<b>96</b>	+2	<b>22</b>	-3
GREECE	<b>94</b>	-3	<b>25</b>	-14
POLAND	<b>93</b>	+2	<b>27</b>	+1
NETHERLANDS	<b>83</b>	-1	<b>10</b>	-2
SLOVAKIA	<b>93</b>	+2	<b>20</b>	+3



Base: Drivers

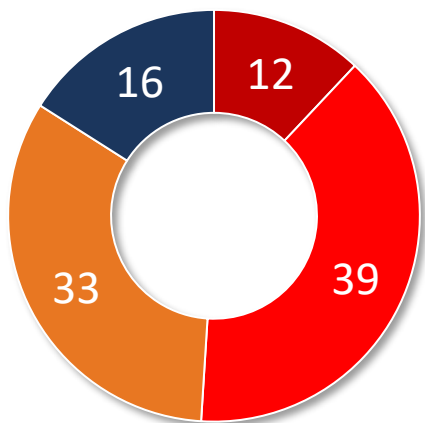
Do you frequently, sometimes, rarely, or never do the following when you are driving your vehicle?

\*\*This year the item has been changed. In 2021, the item was: "Being afraid of the unconscious behaviour of other road users"

# Fear of another driver's aggressive behaviour

## Feel afraid because of the aggressive behaviour of another driver

■ FREQUENTLY ■ SOMETIMES ■ RARELY ■ NEVER



**% YES**  
**84**

**% YES\***

\*FREQUENTLY + SOMETIMES + RARELY

Base: Drivers

FEEL AFRAID BECAUSE OF THE AGGRESSIVE BEHAVIOUR OF ANOTHER DRIVER

	2022	Change / 2021	Of which frequently	Change / 2021
<b>TOTAL</b>	<b>84</b>	=	<b>12</b>	<b>+1</b>
FRANCE	<b>88</b>	=	<b>14</b>	<b>+1</b>
GERMANY	<b>79</b>	<b>+3</b>	<b>8</b>	<b>+1</b>
BELGIUM	<b>85</b>	-2	<b>13</b>	-1
SPAIN	<b>88</b>	-4	<b>16</b>	=
UNITED KINGDOM	<b>81</b>	-3	<b>9</b>	<b>+3</b>
ITALY	<b>86</b>	<b>+1</b>	<b>17</b>	<b>+4</b>
SWEDEN	<b>86</b>	=	<b>11</b>	<b>+2</b>
GREECE	<b>86</b>	-5	<b>14</b>	-2
POLAND	<b>83</b>	<b>+5</b>	<b>13</b>	<b>+3</b>
NETHERLANDS	<b>70</b>	<b>+1</b>	<b>4</b>	<b>+1</b>
SLOVAKIA	<b>87</b>	=	<b>16</b>	<b>+2</b>

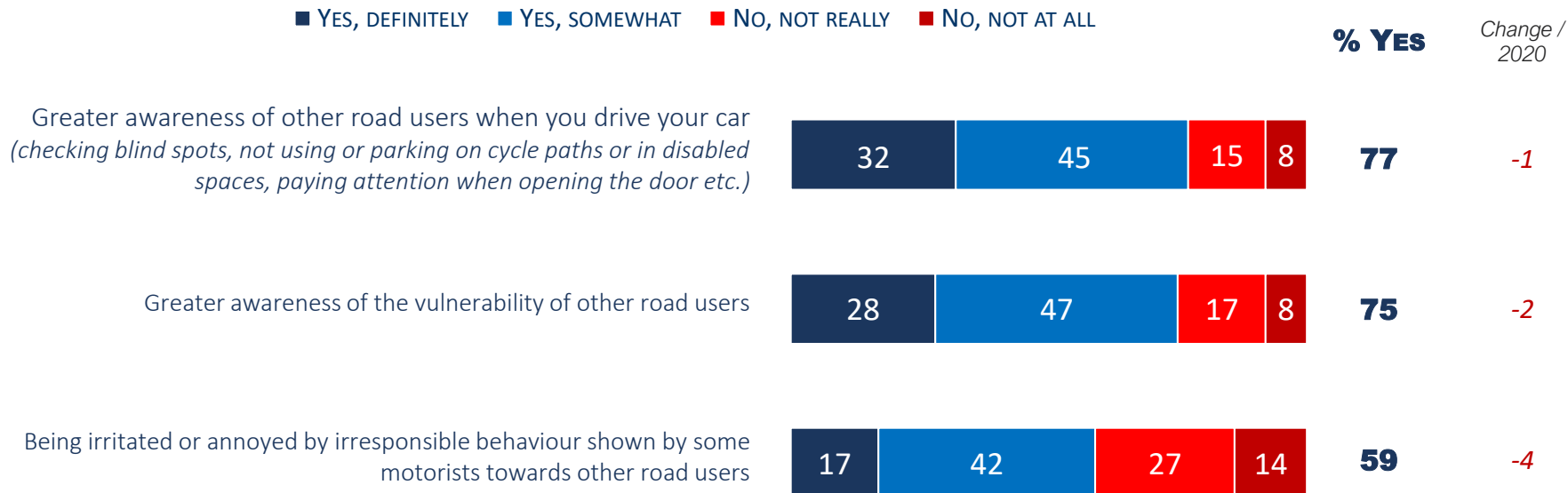


Base: Drivers

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



# The impact of using different modes of travel on driving



Base: Drivers AND those who said they use a motorised two wheelers, a bike, a scooter, etc. (in addition to car)  
*You said that you travel at least occasionally using a means of transport other than a car (a motorised two-wheeler, a bike, a scooter, etc.).  
 Does this have an effect on your behaviour resulting in...*

# The impact of using different modes of travel on driving

## DETAIL BY COUNTRY

**% YES**

	GREATER AWARENESS OF OTHER ROAD USERS WHEN YOU DRIVE YOUR CAR		GREATER AWARENESS OF THE VULNERABILITY OF OTHER ROAD USERS		BEING IRRITATED OR ANNOYED BY IRRESPONSIBLE BEHAVIOUR SHOWN BY SOME MOTORISTS TOWARDS OTHER ROAD USERS	
	2022	Change / 2020	2022	Change / 2020	2022	Change / 2020
<b>TOTAL</b>	<b>77</b>	<b>-1</b>	<b>75</b>	<b>-2</b>	<b>59</b>	<b>-4</b>
FRANCE	84	+5	82	+3	63	=
GERMANY	68	-4	64	-6	50	-8
BELGIUM	82	+2	85	+9	69	+2
SPAIN	85	-2	82	-2	74	-9
UNITED KINGDOM	79	+1	75	-1	54	-2
ITALY	78	-5	73	-6	55	-8
SWEDEN	78	+1	76	+2	45	+2
GREECE	86	-5	82	-6	73	-4
POLAND	60	-9	61	-7	48	-6
NETHERLANDS	65	+3	67	+2	47	-2
SLOVAKIA	92	-1	86	-4	79	-6



Base: Drivers AND those who said they use a motorised two wheelers, a bike, a scooter, etc. (in addition to car)

*You said that you travel at least occasionally using a means of transport other than a car (a motorised two-wheeler, a bike, a scooter, etc.). Does this have an effect on your behaviour resulting in...*

# ANNEXES

# OUR COMMITMENTS



## Professional codes, quality certification, data retention and protection

Ipsos is a member of the following French and European professional market and opinion research organisations:

- **SYNTEC** ([www.syntec-etudes.com](http://www.syntec-etudes.com)), the professional association of market research companies in France
- **ESOMAR** ([www.esomar.org](http://www.esomar.org)), European Society for Opinion and Market Research,

Ipsos France is committed to applying **the ICC/ESOMAR Code of Market and Opinion Research**. This code defines the ethical rules for market research professionals and establishes the protection measures available to respondents.

Ipsos France is committed to complying with applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan for the General Data Protection Regulation (EU Regulation 2016/679). For more information on our privacy policy: <https://www.ipsos.com/fr-En/confidentiality-and-data-protection>

The retention period for personal data of persons interviewed in the context of a study is, unless a specific contractual commitment is made :



- 12 months from the date of completion of an Ad Hoc study
- 36 months after the end date of each wave of a recurrent study

Ipsos France is certified **ISO 20252 : Market Research by AFNOR Certification**



- This document is prepared in accordance with these international codes and standards. The technical elements relating to the study are included in the description of the methodology or in the data sheet of the study report.
- This study was carried out in accordance with these international codes and standards

# RELIABILITY OF RESULTS



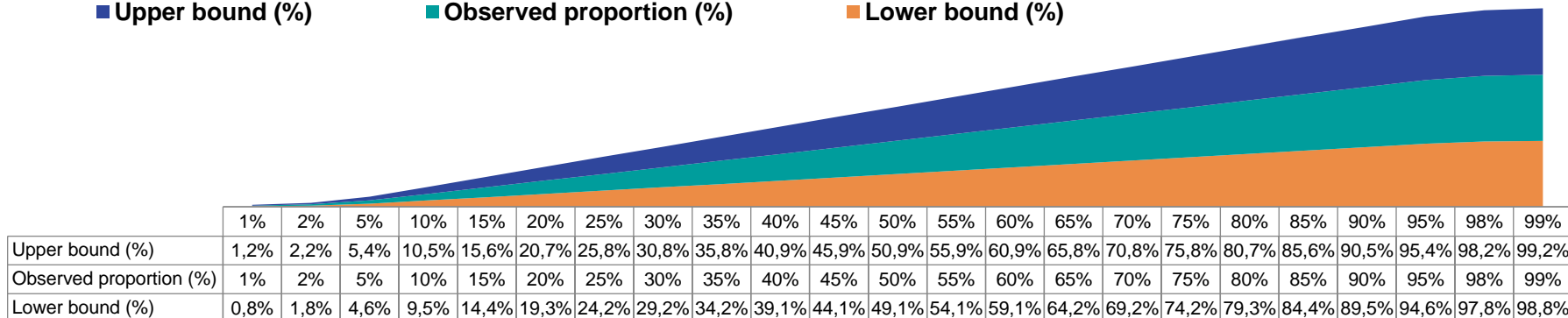
## Spreadsheet

In the case of this study :

- Confidence interval: **95%**.
- Sample size: **12,400**

The observed proportions are between :

■ Upper bound (%)      ■ Observed proportion (%)      ■ Lower bound (%)



# RELIABILITY OF RESULTS : SELF-ADMINISTERED ONLINE STUDIES

The overall reliability of a survey is the result of controlling all the components of error, which is why Ipsos imposes strict controls and procedures at all stages of a survey.

## PRIOR TO THE COLLECTION

- **Sample:** structure and representativeness
- **Questionnaire:** the questionnaire is drafted according to a drafting standard comprising 12 mandatory standards. It is proofread and validated by a senior level and then sent to the client for final validation. The programme (or questionnaire script) is tested by at least two people and then validated.

## AT THE TIME OF COLLECTION

- **Sampling:** Ipsos imposes very strict rules on the use of its sampling bases in order to maximise the randomness of the sample selection: random sampling, solicitation rate, participation rate, abandonment in progress, off-target, etc.

- **Field monitoring:** The collection is monitored and controlled (exclusive link or IP address control, penetration, interview duration, consistency of responses, monitoring of panellist behaviour, participation rate, number of reminders, etc.).

## DOWNSTREAM OF THE COLLECTION

- The results are analysed using statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the collection. The consistency of the results is also checked (in particular the observed results versus the sources of comparison in our possession).
- In the case of sample weighting (margin calibration method), this is checked by the processing teams (PD) and then validated by the research teams.

# ABOUT IPSOS

---

Ipsos is the world's third largest research group. With an effective presence in 90 markets, it employs over 18,000 people and has the capacity to conduct research programmes in over 100 countries.

Our research professionals, analysts and scientists have built a strong group around a unique multi-expertise positioning - marketing research, opinion, citizens, patients, customer/employee relationship management. Our 75 solutions are based on primary data from our surveys, social media monitoring and qualitative or observational techniques.

"Game Changers" - our slogan - sums up our ambition to help our 5,000 customers navigate our fast-changing world more easily.

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](http://www.ipsos.com)

# GAME CHANGERS

---

In a rapidly changing world, relying on reliable data to make the right decisions has never been more important.

At Ipsos, we believe that our clients are looking for more than just a data provider. They need a true partner who provides them with accurate and relevant information, and turns it into knowledge to enable them to take action.

That's why our experts, curious and passionate, deliver the most accurate measurements to extract the information that will allow a true understanding of the Society, the Markets and the People.

We blend our know-how with the best of science and technology, and apply our four principles of safety, simplicity, speed and substance to everything we produce.

To enable our clients to act with greater speed, ingenuity and boldness.

The key to success is a simple truth:

**"YOU ACT BETTER WHEN YOU ARE SURE\*"**.

\*To make the right decisions, you need to be sure.