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Project title

‘Training System on New Safety Technologies for Road Transport
Addressed to Professional Bodies of the Automotive Sector’

Instrument: Specific Support Action

Thematic Priority: e-Safety

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**D9**

*Report about the results obtained in Internet questionnaires for Professional Bodies*
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Introduction

Modern electronic safety technologies so-called “eSafety-systems”, such as Advanced Driver Assistance Systems or Intelligent Vehicle Safety Systems, are an important contribution towards more road safety and will help to decrease the number of fatalities caused by traffic accidents. The better the end users are informed about the safety benefits of these systems the more they will ask for such systems and finally the more vehicles will be equipped with “eSafety-systems”.

To help professionals to better explain the benefits of eSafety-systems, SAFETY-TECHNOPRO, a project financed by the European Commission, was launched.

SAFETY-TECHNOPRO results will define an innovative and efficient methodology for the definition, elaboration and testing of a training system for professionals about eSafety-systems, with a clear customer-demand orientation; the professional bodies involved in this training system would mainly be:

- Sales staff working in car distributors
- Repairing staff working in garages
- Vehicle inspectors working in technical vehicle inspection stations / workshops

For a better definition of this methodology it is very important to understand the professional bodies regarding

- their degree of knowledge of eSafety-systems, which are - already or in a near future - available in the market
- their acceptance of eSafety-systems regarding road safety
- their own attitude towards road safety
- their knowledge of the end users’ attitude towards road safety
- their capabilities and motivation to inform end users about eSafety-systems

Therefore an internet-based survey addressed to professional bodies was launched and loaded during 8 weeks (June and July 2007) on several web-pages of DEKRA companies and DEKRA partners in 11 European countries. For the selection of the countries the following aspects were taken into account:

- population and vehicle park - to include the biggest vehicle parks
  - Germany, France, Italy UK, Spain
- Geography - to include countries from all parts of Europe
  - Finland, Czech Republic, Slovakia, Austria
- vehicle park / accident ratio - to include countries with a high ratio
  - Portugal, Poland
The main target groups (sales staff working in car distributors, workshop staff working in garages and vehicle inspectors working in technical vehicle inspection workshops / stations) were contacted and informed about the survey by the local DEKRA companies / - partners through different channels (e-mails, telephone, direct visits….).

Within this time period 521 professionals participated in the internet survey and filled in the questionnaire.

Regarding the eSafety – systems to be included in the internet survey, the availability (yet in the market or very near to market introduction) was taken into consideration. As a result of this, the following eSafety-systems were selected:

- Emergency Brake Assistant
- Dynamic Stability Control / Electronic Stability Program
- Adaptive headlights / active headlights
- Blind spot monitoring / blind spot information
- Night vision
- Adaptive Cruise Control
- Lane Keeping Assistant / Lane Departure Warning
- Driver condition monitoring / driver drowsiness detection
- Pre crash
- Intelligent speed adaptation
- Real Time Traffic Information
- E-call

The overall results of the 521 questionnaires, obtained through the internet survey, are shown in this report. The results also are compared between countries and groups of professions, to find out eventual differences between countries and/or groups of professions. For the definition and evaluation of the methodology of the training system, it is very important to know these differences as the training system has to be a valuable and useful training instrument for all these groups of profession in all European countries.
Executive Summary

Regarding the knowledge of 5 eSafety-systems which are already available in some car models, the survey showed significant gaps. While the definition of the Emergency Brake Assist was marked correctly by 85% of the participating professionals, only 68% marked the main definition for Dynamic Stability Control / Electronic Stability Program. The knowledge about latest eSafety-systems - which were launched within the last 1 – 2 years – is about the same as the knowledge about Dynamic Stability Control / Electronic Stability Program. This means, that about 30% of the participating professionals do not understand the core characteristics of already available eSafety-systems.

Analysing the latest developments and tendencies, eSafety-systems will become more and more complex and integrated systems. Having access to updated information, to well understand the characteristics but also the limits of eSafety-systems, will gain even more importance. Just one example is the Lane Keeping Assistant “LKA” from one car manufacturer. If this “LKA” is active together with the Adaptive Cruise Control, “ACC” it provides (besides the warning signal) automatic steering interventions. If this “LKA” is active without the “ACC” being active, it “just” supports the driver in his steering interventions (besides the warning signal).

It may be very helpful to define standardized classification within the different eSafety-systems so that end users and professionals can directly see and compare the respective characteristics. Currently, eSafety-systems which have the same or a similar name, can have very different characteristics, depending on the car manufacturers philosophy.

Between the different groups of professions (sales staff, workshop staff, vehicle inspectors, vehicle experts), no significant difference in knowledge can be seen within this survey. The participating professionals form the Czech Republic showed a comparatively low knowledge, while the ones from Germany showed a comparatively high knowledge about the 5 selected eSafety-systems.

Among the participating professionals, sales staff and workshop staff have the highest rate regarding own experience with the different eSafety-systems. However, the rate only is high for DSC / ESP (65%) and Emergency Brake Assist (49%). With latest ADAS the professions have much less own experience, ACC (26%), Lane Departure Warning / Lane Keeping Assistant (20,5%) and Night Vision (9%).

DSC/ ESP is seen as the ADAS with the highest potential to avoid accidents, followed by Emergency Brake Assist, Lane Departure Warning / Lane Keeping Assistant, Night Vision and Blind Spot Monitoring. The comparison between the groups of professions shows that the participating sales staff estimates the safety potentials highest and the workshop staff lowest. Comparing the countries, Spanish professionals estimate the potential comparatively low.

The participating professionals indicate their personal knowledge about ADAS in general as not very good. On the scale from 1: “very limited” to 5: “very good” the average value is below “3” for most of the ADAS. Only regarding DSC/ESP, Emergency Brake Assist, adaptive headlights and ACC, the average value of the indication of the own knowledge is between “3” and “4”.

The participating professionals form the Czech Republic and the UK indicate their knowledge as relatively low compared to their colleagues form the other countries.
1/3 of all participants have not received any ongoing training about ADAS. In Italy, Spain and the UK even more than 60% haven’t received any ongoing training. Most of the ongoing training was received through autonomous reading in leisure time. Training courses or handed over information did only receive about 23% of all the participating professionals. This value is slightly higher within the groups of sales staff and workshop staff with around 40%.

“Living without a car would be an unreasonable restriction in people’s life” is the statement with the highest level of agreement given by the professionals. They also more agree than disagree that “people think that they are able to handle most of the dangerous situations in road traffic on their own” and that “people think that ADAS makes driving more comfortable”. In general the professionals are indifferent regarding the statements that “people feel some anxiety, when approaching new technology” and that “people do not want to be supported by ADAS”. They also are quite indifferent regarding the statements that “adventure is more important for people than safety”. Here can be seen a difference between the countries. While the professionals from Germany, Austria and Spain are quite indifferent with this statement, the ones from Portugal and Slovakia more agree. Professionals from France, Italy and Portugal think that the fair distribution of costs for ADAS is an important factor for people.

Asked for their own opinion, the professionals agree that road traffic dangers are important items to deal with, and that it is mainly the duty of all participants in road traffic and the public authorities to ensure road safety. The participating professionals from Germany, UK and Finland are less concerned about road traffic dangers than their colleagues. The professionals from France are quite concerned about ADAS becoming too dominant. Together with their colleagues from Portugal they more agree that the fairness regarding the share of costs is an important aspect for a future distribution of ADAS.

The participating professionals highly agree that end users have to be actively informed about ADAS to well understand its characteristics. End users will be overburdened when they have to inform themselves about ADAS. The professionals also highly agree that experts should discuss and explain ADAS to end users. Sales persons are seen as the main group of professionals which has to inform end users. In general the participating professionals think to be not well prepared to inform end users about ADAS.

The participating sales persons also see themselves as the main group who has to inform the end users. They also commit themselves to spend extra time to inform their clients about the safety benefits of ADAS. However the participating sales persons also indicate that there is a lack of material to visualize the characteristics of ADAS to end users.
Personal data

In total, 521 filled in questionnaires were received through the internet-survey.

Country and profession

The numbers of received questionnaires by country is shown in the following graphic:

![Distribution by country](graphic1.png)

The distribution of the received questionnaires by profession shows that sales staff showed a significant low interest in filling in the internet questionnaire.

![Distribution by profession](graphic2.png)
Among “others” most of the participants are vehicle experts. These vehicle experts are determining the repair costs of vehicles, involved in an accident and very often are also involved in analysing the cause of accidents. In some countries vehicle experts are contacted by end users and lawyers, when a neutral expert opinion about technical and vehicle related items is needed.

The distribution by profession and country is shown in the following graphic.
Gender and age

18 of the 521 professionals who participated in the survey are female. The distribution of the age is shown in the following table:

<table>
<thead>
<tr>
<th>Age in years</th>
<th>No of professionals</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 – 21</td>
<td>7</td>
</tr>
<tr>
<td>22 – 30</td>
<td>89</td>
</tr>
<tr>
<td>31 – 40</td>
<td>183</td>
</tr>
<tr>
<td>41 – 50</td>
<td>128</td>
</tr>
<tr>
<td>51 – 60</td>
<td>97</td>
</tr>
<tr>
<td>&gt; 60</td>
<td>7</td>
</tr>
</tbody>
</table>

Driving experience

The professionals were asked to indicate their driving experience as well as their average driving distance per year. The results are shown in the following two tables:

<table>
<thead>
<tr>
<th>Driving experience in years</th>
<th>No of professionals</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 5</td>
<td>17</td>
</tr>
<tr>
<td>6 – 15</td>
<td>141</td>
</tr>
<tr>
<td>16 – 25</td>
<td>167</td>
</tr>
<tr>
<td>&gt; 25</td>
<td>196</td>
</tr>
<tr>
<td>Average driving distance / year</td>
<td>No of professionals</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>0 – 5000 km</td>
<td>9</td>
</tr>
<tr>
<td>5000 – 10000 km</td>
<td>47*</td>
</tr>
<tr>
<td>10000 – 15000 km</td>
<td>89**</td>
</tr>
<tr>
<td>&gt; 15000 km</td>
<td>376 ***</td>
</tr>
</tbody>
</table>

* One indicated an average driving distance of 5000 – 10000 miles.
** One indicated an average driving distance of 10000 – 15000 miles.
*** 12 of these professionals indicated an average driving distance of more than 15000 miles.
Knowledge about ADAS

In the second part of the questionnaire the knowledge about 5 ADAS, already available in the market, was tested. For every ADAS several definitions were given and the participants had to choose the correct definition - or several correct definitions - per ADAS.

The distribution of the chosen definitions is shown in the following graphics:

*Emergency Brake Assist*

85% of the all participants chose the right definition for the Emergency Brake Assist.
Between the different groups of professions, there is no significant difference regarding the knowledge about Emergency Brake Assist. Within all groups of professions the right definition was selected by more than 80%.

However, 15% of the workshop staff selected as a right definition of Emergency Brake Assist, that it “brakes automatically when obstacles on the road are detected”.

There may be a confusion with latest developments where the Emergency Brake Assist is linked to radar sensors, to anticipate the need of an emergency brake. This system already prepares the brake system for an emergency brake without the need to press the break pedal quickly. Bosch calls this system “Predictive Brake Assist”. However, this system also will not break automatically when obstacles are detected but “just” prepares the break system for an emergency break.

17% of “others” think that this system also “warns the driver when obstacles on the road are detected”.
Between the different countries, the professionals from France and the Czech Republic seem to have a lower knowledge about the Emergency Brake Assist, while the professionals from Poland and Germany appear to be quite well informed.
**Dynamic Stability Control / Electronic Stability Program**

All participants

![Bar chart showing responses to different definitions of DSC / ESP](image)

Only 68% of the participating professionals chose the definition which reflects best the characteristics of Dynamic Stability Control / Electronic Stability Program “DSC / ESP”.

Almost 37% marked, that DSC / ESP “keeps the vehicle stable in an emergency braking situation”. As vehicles with DSC / ESP also have ABS installed, this answer may be seen as correct as long as the main definition (that it prevents vehicle from skidding) also is selected. However, the analysis of the questionnaires showed that only 27% of the professionals who selected the definition that the systems “keeps the vehicle stable in an emergency braking situation” also selected the main definition that it “prevents the vehicle from skidding within the physical limits”.

Compared to the end users’ survey, where 52% of the participants marked the correct definition of DSC / ESP, the percentage of the professionals is higher but still far away from being good.
All participants by profession

Sales staff and workshop staff showed best knowledge about the main definition of DSC / ESP. However, there are still about 20% out of these groups, having not marked the main definition.

Vehicle inspectors are the group with less knowledge about DSC / ESP with only 61.5% having marked the main definition. With almost 48%, vehicle inspectors are the ones who most marked that the system “keeps the vehicle stable in an emergency braking situation” which is the core definition of the ABS system.
All participants by country

Only 33% - 38% of the participants of the Czech Republic and Italy marked the main definition of DSC /ESP. In Italy, end users seem to be better informed than the professionals, as 60% marked the main definition for DSC / ESP within the end users’ survey.

In Germany 97% and in Austria 89% of the participating professionals marked the main definition. One reason for this may be that most of the new vehicles in these countries do already have DSC / ESP as serial equipment.
**Lane Keeping Assistant / Lane Departure Warning**

All participants

67% of all participants marked the main definition for this system, that it "warns the driver through vibrations when he leaves the lane". Though there are some systems warning the driver through acoustical or optical signals – when leaving the lane –, vibrations is still the most spread way to warn drivers.

Almost 25% marked that the system "keeps the vehicle on the road through automatic steering interventions" without marking the main definition. Actually there is one manufacturer who already offers a system, where the Lane Keeping Assistant - when used together with the Adaptive Cruise Control - is automatically performing steering interventions once the system has detected that the vehicle leaves the lane. However, the driver always can easily steer against these interventions.

This example shows how difficult it is to exactly know the features and limits of the various systems having the same or a similar name. This depends only on the manufacturer’s philosophy.

Within the end users’ survey almost 57% of participants marked the main definition, which is a value not much lower than the one from the professionals.
All participants by profession

Of all participants, the groups “sales staff” and “vehicle experts” seem to have a low knowledge about this system; only 56 % (sales staff) / 58 % (vehicle experts) marked the main definition.
The participants from Germany, Italy and France show the best knowledge about this system while the participants from the Czech Republic and Austria show the lowest knowledge. The fact that Citroen was the first manufacturer who offered and promoted such a system called “AFIL”, may be one reason for the high level of knowledge in France.
On the other hand, the French end users showed a very low knowledge regarding this system within the end users’ survey.
**Adaptive Cruise Control**

All participants

![Adaptive Cruise Control - All](graphic)

The core-feature of the Adaptive Cruise Control “ACC” is that it “keeps the distance constant to a vehicle which drives in front”. However, the basic function of this system is that it “keeps the speed constant” as long as there is no vehicle driving with lower speed in front. Only 7 % of all participants marked both definitions, while most of the participants who marked that ACC “keeps the speed constant” did not mark that it also “keeps the distance constant...”.

Though 73% marked that ACC “keeps the distance constant..” which is the main function of ACC, they may not be aware that ACC is not keeping the distance constant at any speed. ACC is “only” keeping the distance (a safety distance) constant, when there is a vehicle in front driving with a lower speed than the adjusted speed.
All participants by profession

Within the different group of professions no significant difference from the overall results can be seen.
All participants by country

**Graphic 22**

Between the different countries there is a big difference regarding the understanding of ACC. The participants from Italy and Spain are the ones who most marked that ACC keeps the speed constant (51 % Italy, 59 % Spain) and less marked that ACC keeps the distance constant (40 % Italy, 32 % Spain).
Around 90% of the participants form Germany, Austria and Finland marked that ACC keeps the distance constant but not that it keeps the speed constant. Almost 40% of the French participants marked that ACC adapts the speed to the weather and road-conditions.

**Night Vision**

65.5% of all participants marked the correct definition of Night Vision, which is “….displays the pictures onto a screen or the windscreen”, while almost 40% think that Night Vision is “warning the driver when obstacles are detected during night drives”. Such an explanation to end users can cause wrong expectations with potential negative effects for the road safety or/and the acceptance of the system once purchased.
All participants by profession

Though there is not a significant difference between the different groups of professions regarding their knowledge about Night Vision, the vehicle inspectors among the participants seem to have the best knowledge about this system while workshop staff and vehicle experts showed lower knowledge.
All participants by country

**Graphic 26**

**Night Vision - by country /1**

- "... warns driver when obstacles are detected during night-drives"
- "... brakes automatically when obstacles are detected during night-drives"
- "... displays the pictures within the long distance light area onto a screen in the dashboard or onto the windscreen"

**Graphic 27**

**Night Vision - by country /2**

- "... warns driver when obstacles are detected during night-drives"
- "... brakes automatically when obstacles are detected during night-drives"
- "... displays the pictures within the long distance light area onto a screen in the dashboard or onto the windscreen"
The participants from Italy showed a very high knowledge about Night Vision. Also the participants from Austria, Portugal and Germany are above the average-value regarding the percentage of marked correct definitions. Among the participants with low knowledge about Night Vision are the ones from the Czech Republic, Slovakia and Finland. In Finland, where during the winter season, the hours with daylight are quite limited, Night Vision is not well known by the majority of the participants as 60% marked, that Night Vision warns the driver, while only 46% marked the correct definition.

Resume:

The participating professionals showed by far the best knowledge about the Emergency Brake assist. Though already many efforts have been made by several stakeholders to promote Dynamic Stability Control / Electronic Stability Program, many professionals still have not understood the core benefit of this system. Newer and less available ADAS like Lane Departure Warning / Lane Keeping Assistant, Adaptive Cruise Control and Night Vision are still not very well known either. It seems that some professionals mix the characteristics of the systems and others expect too much from these systems. Especially the last point can lead to disappointment or even dangerous situations when characteristics are communicated to the end user with which the system cannot comply.

The analysis of the knowledge about ADAS by countries show that German participants are relatively well informed, while the participants of the Czech Republic still need to have more information about almost all systems. In France and Italy the knowledge about ADAS seems to vary very strong from one ADAS to another.

Between the different groups of professions no significant difference in their knowledge about ADAS can be seen. Depending on the ADAS one group has a slightly better knowledge than the other groups.
Own experience with ADAS

In the next chapter of the questionnaire the professionals were asked if they have own experience with different ADAS.

All participants

DSC / ESP (65 %) and Emergency Brake Assist (49 %) have been tested by a high percentage of the participating professionals.

The newest ADAS like ACC (26 %), Lane Departure Warning / Lane Keeping Assistant (20,5 %) and Night Vision (9 %) have been tested by a significantly lower percentage of professionals.
Comparison between groups of professions

All participants by profession

The comparison between the groups of professionals show that sales staff have the best opportunities to test ADAS, followed by workshop staff.
Comparison between countries

All participants by country

Graphic 30

<table>
<thead>
<tr>
<th>Feature</th>
<th>F</th>
<th>PL</th>
<th>CS</th>
<th>D</th>
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<th>All</th>
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<td>Night vision</td>
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<td></td>
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<tr>
<td>Blind spot monitoring</td>
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<td></td>
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<tr>
<td>Adaptive headlights</td>
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<td>Dynamic Stability Control</td>
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<tr>
<td>Emergency Brake Assist</td>
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</tbody>
</table>
Depending on the ADAS, the participating professionals from one country have more own experience than the ones from the other countries. There is no country where the participating professionals – over all ADAS – have significant more or less own experience than the ones from other countries.
Estimated safety potential of ADAS

Besides their own experience with ADAS, the professionals were asked to estimate – from their point of view – the potential of different ADAS to avoid accidents. Therefore a range from 1: “very low” up to 5: “very high”, was available to determine the potential. The following graphics show the average values.

With an average value of “4” DSC / ESP is seen as the ADAS with the highest potential to avoid accidents, followed by Emergency Brake Assist (3,75). Both ADAS are the ones with which the participating professionals have had most own experience. From the newer ADAS, Night Vision (3,6) and Lane Departure Warning / Lane Keeping Assistant (3,5) are seen as the ADAS with a high potential to avoid accidents.
Comparison between groups of professions

All participants by profession:

Sales staff generally estimate the potential of the ADAS to avoid accidents highest – except for Adaptive head-lights. Workshop staff generally seem to be most critical regarding the safety benefits of ADAS.
Comparison between countries

All participants by country

Potential to avoid accidents - by country/1

Graphic 34
All participants – by country

The participating professionals from Italy and Austria generally see a high potential of ADAS to avoid accidents, while the participating professionals from Spain view the safety-potential of ADAS in general more limited.
Resume

Regarding their own experience with ADAS, sales staff and workshop staff seem to have the best access to test/experience ADAS. Regarding the potential to avoid accidents the participating professionals consider DSC / ESP and Emergency Brake Assist as the ADAS with the highest safety potential, followed by Night Vision, Lane Departure Warning / Lane Keeping Assistant and Blind Spot Monitoring. Adaptive Cruise Control and especially adaptive head lights are seen as ADAS with less safety potential.
Indication of own knowledge about ADAS

The professionals were asked to indicate their own knowledge about ADAS in the range from 1: “very limited” to 5: “very good”.

All participants

![Graph](image-url)  

Being asked to estimate their personal knowledge of the different systems, the participating professionals rank DSC/ESP first (average “3,7”), followed by Emergency Brake Assist (3,52), Adaptive head lights (3,46) and Adaptive Cruise Control (3,43).

They claim to have the lowest knowledge of Pre Crash System (2,31), Drowsiness Detection System (2,44) and Intelligent Speed Adaptation (2,51).

Keeping in mind the range from 1 to 5, the participating professionals generally rate their knowledge to be not very good, even for the highest ranked ADAS – DSC / ESP – with an average of only 3,7.

Comparison between groups of profession
All participants by profession

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**Graphic 37**

**Indication of personal knowledge - by profession/1**

- **Adaptive Cruise Control**
- **Night Vision**
- **Blind Spot Monitoring**
- **Adaptive head lights**
- **Dynamic Stability Control**
- **Emergency Brake Assist**

**Legend**
- Vehicle inspectors
- Others
- Vehicle experts
- Workshop staff
- Sales staff
- All

---
The group of sales staff indicate their personal knowledge about the different ADAS in general better compared to the other groups. However this own estimation of “higher knowledge” can not be confirmed by the results form the multiple choice questiona.

Between the other groups of professions no significant difference can be seen. Depending on the ADAS, one group estimate their knowledge slightly higher or lower than the other groups.
Comparison between countries

All participants by country

![Graph showing comparison between countries for various technologies]

Graphic 39
All participants by country

Indication of personal knowledge - by country/2

- E - Call
- Real Time Travel Information
- Intelligent Speed Adaptation
- Pre Crash System
- Driver Drowsiness Detection
- Lane Departure Warning

France
Italy
Poland
Czech Republic
Germany
Finland
All

Graphic 40
All participants by country

<table>
<thead>
<tr>
<th>Feature</th>
<th>UK</th>
<th>Spain</th>
<th>Portugal</th>
<th>Slovakia</th>
<th>Austria</th>
<th>All</th>
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<tbody>
<tr>
<td>Emergency Brake Assist</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Dynamic Stability Control</td>
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<td>Adaptive head lights</td>
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<td>Blind Spot Monitoring</td>
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<td>Night Vision</td>
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<tr>
<td>Adaptive Cruise Control</td>
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</tbody>
</table>
In general, the participating professionals from Germany indicate their knowledge about ADAS as relatively good, followed by the professionals from France, Italy and Portugal.

The participating professionals from the Czech Republic and the UK indicate their knowledge as relatively limited compared to the other countries.
Resume:

The participating professionals declare that their personal knowledge about ADAS in general is not very good. Only sales staff indicated their personal knowledge about DSC / ESP, Emergency Brake Assist, Adaptive Head Lights and Adaptive Cruise Control as “good” (with an average of around “4”).

The personal knowledge about ADAS, like Blind Spot Detection, Lane Departure Warning / Lane Keeping Assistant, and Night Vision, which are already on the market (though by a limited number of manufacturers), was indicated by all groups of professions around “3”.

According to their own statements, the German professionals appear to have relatively good knowledge about ADAS, followed by the French, Italian and Portuguese, whereas the Czech and British professionals claim to have rather limited knowledge compared to other countries.
Ongoing Training

In addition to the questions regarding their personal knowledge about ADAS, the professionals were asked if they have taken part in any further / ongoing training regarding ADAS.

All participants

36,3 % of all participating professionals did not receive any further training about ADAS. 25,7 % informed themselves by autonomous reading in leisure time. Only 12,7 % received training through handed over information and 11,5 % through a professional training.

Only 2,9 % have received further training through Internet tools.
Comparison between groups of professions

All participants – by profession

Though sales staff are the group which most received professional training, the percentage of sales staff which received this training - only is 26 %, followed by workshop staff with 19,5 % and vehicle inspectors with 11 %.

The same ranking can be seen with trainings received through handed over information.

Vehicle inspectors, vehicle experts and others are the groups which get most information about latest ADAS through autonomous reading in leisure time.
Comparison between countries

All professionals by country

Graphic 45

Further training on ADAS - by country/1

Graphic 46

Further training on ADAS - by country/2
The participating professionals from Germany, Poland and Austria seem to be the ones who spend most leisure time in getting further training/information about ADAS, while the professionals form Italy, UK and Spain are the ones who do not receive any training at all about the latest ADAS.

Resume:

Around 1/3 of the participating professionals did not receive any further training about the latest ADAS while another 1/3 did receive some further training through autonomous reading in leisure time.

Within the group of sales staff and workshop staff, the situation is slightly better. However the percentage who received professional training or special hand outs is not above 40%.

The participating professionals from Germany, Poland and Austria seem to be the ones who spend most leisure time in getting further training/information about ADAS, while the professionals form Italy, UK and Spain are the ones who do not receive any training at all about latest ADAS.
The way professionals see their clients’ attitude towards driving, road safety and new technology

Besides knowing more about the professional’s knowledge about ADAS, another aim of this survey was to find out how the professional characterize their clients regarding road safety, driving in general and new vehicle technology.

In the first block, the professionals were asked to consider their clients with whom they are in daily contact. They were asked to characterize them by marking how far they agree with different statements related to road safety and driving in general.

The level of agreement had to be valued between 1: “I don’t agree” up to 5: “I agree”.

The following graphics show the level of agreement regarding the different statements for all and separated by group of professions and countries.

Since the aim of the comparison between profession and country is finding out significant differences between groups of professions and/or countries, only the average values (not the distribution of the single values) are shown and compared, in order not to overload the information in the graphics.
All participants – distribution of single values

How professionals estimate their clients’ attitude towards driving and dangers

- People want to show who they are through possessing an attractive car.
- Driving is fun for people.
- For people to live without a car would be an unreasonable restriction in their life.
- People are afraid they could die through a car accident.
- People worry that they could be badly injured in a car accident.
- People are scared thinking about road traffic dangers and that they might be involved in.

0% 20% 40% 60% 80% 100%

[1: I disagree 2 3 4 5: I agree]

Graph 47

All participants – average values

How professionals estimate their clients’ attitude towards driving and dangers

- People want to show who they are through possessing an attractive car.
- Driving is fun for people.
- For people to live without a car would be an unreasonable restriction in their life.
- People are afraid they could die through a car accident.
- People worry that they could be badly injured in a car accident.
- People are scared thinking about road traffic dangers and that they might be involved in.

0,00 1,00 2,00 3,00 4,00 5,00

[Average value of all participants (1 = I don't agree, 2, 3, 4, 5 = I agree)]

Graph 48
All participants – distribution of single values

**How professionals estimate their clients’ attitude towards driving**

- People believe that they can handle each problem occurring in road traffic without any difficulties.
- People are confident they could deal efficiently with unexpected events while driving.
- People are convinced they can always manage to overcome difficult situations while driving if they try hard enough.
- It exhilarates people to do things that might be dangerous for them.
- Excitement and adventure are more important to people than safety.
- Some people sometimes take risks, just to have fun.

All participants – average values

**How professionals estimate their clients’ attitude towards driving**

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- Excitement and adventure are more important to people than safety.
- Some people sometimes take risks, just to have fun.

*Graphic 49*

*Graphic 50*
All participants – distribution of single values

How professionals estimate their client's attitude towards new vehicle technology

- People prefer to steer their car completely on their own, rather than trusting an ADAS which may act for the driver in
- People are not happy that new ADAS in cars are becoming so important in our daily lives.
- People prefer to drive independently instead of being supported by ADAS.
- People get nervous thinking about highly equipped cars.
- Most people are convinced that everyone else knows how to use latest in-car equipment better than themselves.
- People feel some anxiety when they approach a car with the latest equipment.

1: I disagree 2 3 4 5: I agree

Graphic 51

All participants – average values

How professionals estimate their clients’ attitude towards new vehicle technology

- People prefer to steer their car completely on their own, rather than trusting an ADAS which may act for the driver in
- People are not happy that new ADAS in cars are becoming so important in our daily lives.
- People prefer to drive independently instead of being supported by ADAS.
- People get nervous thinking about highly equipped cars.
- Most people are convinced that everyone else knows how to use latest in-car equipment better than themselves.
- People feel some anxiety when they approach a car with the latest equipment.

Average value of all participants (1= I don’t agree, 2, 3, 4, 5 = I agree)

Graphic 52
All participants – distribution of single values

How professionals estimate their clients’ attitude towards ADAS

People are very curious to see how the newest ADAS can improve safety

It will be very exciting for people to use modern ADAS while driving.

People will feel their social status improving through having the latest ADAS in their car.

People feel that ADAS will make driving much more comfortable.

People will be proud to have the latest ADAS in their car.

People feel very comfortable using ADAS while driving.

All participants – average values

How professionals estimate their clients’ attitude towards ADAS

People are very curious to see how the newest ADAS can improve safety

It will be very exciting for people to use modern ADAS while driving.

People will feel their social status improving through having the latest ADAS in their car.

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People will be proud to have the latest ADAS in their car.

People feel very comfortable using ADAS while driving.

Average value of all participants (1= I don’t agree, 2, 3, 4 = I agree, 5 = I agree)

Graphic 53

Graphic 54
All participants – distribution of single values

<table>
<thead>
<tr>
<th>How professionals estimate their clients’ attitude towards the share of costs for ADAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>People would regard it unfair if they were the only ones who’d invest in the ADAS</td>
</tr>
<tr>
<td>To share the costs, people regard it unfair if the distribution of ADAS wasn’t obligatory.</td>
</tr>
<tr>
<td>People regard it unfair if only some drivers were to use ADAS.</td>
</tr>
</tbody>
</table>

![Graph 55](image)

All participants – average values

<table>
<thead>
<tr>
<th>How professionals estimate their clients’ attitude towards the share of costs for ADAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>People would regard it as unfair if they were the only ones who’d invest in the ADAS</td>
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<td>To share the costs, people regard it as unfair if the distribution of ADAS wasn’t obligatory.</td>
</tr>
<tr>
<td>People regard it as unfair if only some drivers were to use ADAS.</td>
</tr>
</tbody>
</table>

![Graph 56](image)
With an average level of agreement of “4,08” the participating professionals think that “for people living without a car would be an unreasonable restriction in their life”. The professionals also more agree than being indifferent – with average agreement-levels of “3,5 - 3,6” - that “people think that they are able to handle most of the dangerous situations in road traffic on their own” and that “people think that ADAS makes driving more comfortable”.

With agreement-levels below “3” they are more indifferent regarding the statements that:

- people feel some anxiety when thinking about new technology
- people do not want to be supported in critical situations by ADAS
- for people adventure and fun are more important than safety
- people would see it unfair if the distribution of ADAS wasn’t obligatory (to share costs)
**Comparison between groups of professions**

All participants – average values – by profession

<table>
<thead>
<tr>
<th>How professionals estimate their clients’ attitude towards driving and dangers - by profession</th>
</tr>
</thead>
<tbody>
<tr>
<td>People want to show who they are through possessing an attractive car.</td>
</tr>
<tr>
<td>Driving is fun for people.</td>
</tr>
<tr>
<td>For people to live without a car would be an unreasonable restriction in their life</td>
</tr>
<tr>
<td>People are afraid they could die through a car accident</td>
</tr>
<tr>
<td>People worry that they could be badly injured in a car accident.</td>
</tr>
<tr>
<td>People are scared thinking about road traffic dangers and that they might be involved in.</td>
</tr>
</tbody>
</table>

The group of sales staff agrees most with the statements that people are scared about the dangers in road traffic while the group of workshop staff agrees less.
All participants – average values – by profession

Sales staff agree most with the statements that excitement and fun is more important for people than road safety and that people think that they can handle dangerous situations in road traffic on their own.

Sales staff agree most with the statements that excitement and fun is more important for people than road safety and that people think that they can handle dangerous situations in road traffic on their own.
All participants – average values – by profession

Sales staff agree less with the statements that people don’t want to be supported by ADAS and that people feel some anxiety when thinking about new technology.
Sales staff agree most with the statements that people see road safety and comfort benefits by having ADAS in their cars.
All participants – average values – by profession

How professionals estimate their clients’ attitude towards the share of costs for ADAS - by profession

1. People are very curious to see how the newest ADAS can improve safety
2. People would regard it as unfair if they were the only ones who’d invest in the ADAS
3. To share the costs, people regard it as unfair if the distribution of ADAS wasn’t obligatory.
Comparison between countries

All participants – average values – by country

![Graph showing how professionals estimate their clients' attitude towards driving and dangers by country.](graphic62.png)

Graphic 62
All participants – average values – by country

The participating professionals from Germany, France and the UK agree most with the statement that living without a car would be an unreasonable restriction for people. Professionals from Austria think that people are quite scared about road traffic dangers.
All participants – average values – by country

**How professionals estimate their clients’ attitude towards driving - by country/1**

- People believe that they can handle each problem occurring in road traffic without any difficulties.
- People are confident they could deal efficiently with unexpected events while driving.
- People are convinced they can always manage to overcome difficult situations while driving if they try hard enough.
- It exhilarates people to do things that might be dangerous for them.
- Excitement and adventure are more important to people than safety.
- Some people sometimes take risks, just to have fun.

**Graphic 64**

Legend:
- All
- Finland
- Germany
- Czech Republic
- Poland
- Italy
- France
All participants – average values – by country

How professionals estimate their clients’ attitude towards driving - by country /2

- People believe that they can handle each problem occurring in road traffic without any difficulties.
- People are confident they could deal efficiently with unexpected events while driving.
- People are convinced they can always manage to overcome difficult situations while driving if they try hard enough.
- It exhilarates people to do things that might be dangerous for them.
- Excitement and adventure are more important to people than safety.
- Some people sometimes take risks, just to have fun.

Professionals from Austria, Spain and Germany are quite indifferent with the statements that for people fun is more important than safety, while the professionals from Portugal and Slovakia do more agree with these statements. Professionals from all countries do agree quite a lot with the statement that people think they can handle difficult situation in road traffic.
All participants – average values – by country

How professionals estimate their clients’ attitude towards new vehicle technology

- by country /1

- People prefer to steer their car completely on their own, rather than trusting an ADAS which may act for the driver in dangerous situations.

- People are not happy that new ADAS in cars are becoming so important in our daily lives.

- People prefer to drive independently instead of being supported by ADAS.

- People get nervous thinking about highly equipped cars.

- Most people are convinced that everyone else knows how to use latest in-car equipment better than themselves.

- People feel some anxiety when they approach a car with the latest equipment.

People feel some anxiety when they approach a car with the latest equipment.

Most people are convinced that everyone else knows how to use latest in-car equipment better than themselves.

People prefer to drive independently instead of being supported by ADAS.

People are not happy that new ADAS in cars are becoming so important in our daily lives.

People prefer to steer their car completely on their own, rather than trusting an ADAS which may act for the driver in dangerous situations.

People feel some anxiety when they approach a car with the latest equipment.
All participants – average values – by country

<table>
<thead>
<tr>
<th>How professionals estimate their clients’ attitude towards new vehicle technology - by country /2</th>
</tr>
</thead>
<tbody>
<tr>
<td>People prefer to steer their car completely on their own, rather than trusting an ADAS which may act for the driver in dangerous situations.</td>
</tr>
<tr>
<td>People are not happy that new ADAS in cars are becoming so important in our daily lives.</td>
</tr>
<tr>
<td>People prefer to drive independently instead of being supported by ADAS.</td>
</tr>
<tr>
<td>People get nervous thinking about highly equipped cars.</td>
</tr>
<tr>
<td>Most people are convinced that everyone else knows how to use latest in-car equipment better than themselves.</td>
</tr>
<tr>
<td>People feel some anxiety when they approach a car with the latest equipment.</td>
</tr>
</tbody>
</table>

Professionals from France think that people are not happy that ADAS should act for them in difficult situations and that they prefer to steer on their own.
The professionals from UK, Spain, Portugal and France quite agree that people will feel some anxiety when having latest technology in the car.
All participants – average values – by country

How professionals estimate their clients’ attitude towards ADAS - by country /1

- People regard it as unfair if only some drivers were to use ADAS.
- It will be very exciting for people to use modern ADAS while driving.
- People will feel their social status improving through having the latest ADAS in their car.
- People feel that ADAS will make driving much more comfortable.
- People will be proud to have the latest ADAS in their car.
- People feel very comfortable using ADAS while driving.

Graphic 68
All participants – average values – by country

How professionals estimate their clients’ attitude towards ADAS
- by country /2

- People regard it as unfair if only some drivers were to use ADAS.
- It will be very exciting for people to use modern ADAS while driving.
- People will feel their social status improving through having the latest ADAS in their car.
- People feel that ADAS will make driving much more comfortable.
- People will be proud to have the latest ADAS in their car.
- People feel very comfortable using ADAS while driving.

<table>
<thead>
<tr>
<th>All</th>
<th>Slovakia</th>
<th>Portugal</th>
<th>Spain</th>
<th>UK</th>
<th>Austria</th>
</tr>
</thead>
</table>

Graphic 69
All participants – average values – by country

**Graphic 70**

**How professionals estimate their clients’ attitude towards the share of costs for ADAS - by country /1**

- People are very curious to see how the newest ADAS can improve safety
- People would regard it unfair if they were the only ones who'd invest in the ADAS
- To share the costs, people regard it as unfair if the distribution of ADAS wasn’t obligatory.

**Graphic 71**

**How professionals estimate their clients' attitude towards the share of costs for ADAS - by country /2**

- People are very curious to see how the newest ADAS can improve safety
- People would regard it as unfair if they were the only ones who’d invest in the ADAS
- To share the costs, people regard it unfair if the distribution of ADAS wasn’t obligatory.
Professionals from France and Italy think that people are very curious to see how ADAS can improve safety. They also think, like the professionals from Portugal, that people would regard it unfair if the costs for ADAS wouldn’t be shared.

Resume:

“Living without a car would be an unreasonable restriction in their life”, is the statement with the highest level of agreement. The professionals also more agree than disagree that people think that they are able to handle most of the dangerous situations in road traffic on their own and that people think ADAS makes driving more comfortable. In general the professionals are indifferent regarding the statements that people feel some anxiety when approaching new technology and that people do not want to be supported by ADAS. They also are quite indifferent regarding the statements that “adventure is more important for people than safety” and that “people think it would be unfair if the distribution of ADAS wasn’t obligatory”.

Regarding the groups of professionals it can be stated that sales staff are the group whose statements are most explicit. That means this group mostly has the highest or lowest average values of agreement.

Regarding the different countries, the professionals from Portugal and Slovakia more agree that for people fun is sometimes more important than safety, while professionals from Austria, Spain and Germany have a different view on this matter. Professionals from France think that people are not happy that ADAS should act for them in difficult situations and that they prefer to steer on their own. The professionals from UK, Spain, Portugal and France quite agree that people will feel some anxiety when having latest technology in their car. Professionals from France and Italy think that people are very curious to see how ADAS can improve safety. They also think, like the professionals from Portugal, that people would regard it unfair if the costs for ADAS wouldn’t be shared.
Own attitude towards road safety and driving

In this chapter the professionals were asked about their own attitude towards road safety and driving related items.

All participants – distribution of single values

---

**What professionals think about road traffic dangers**

- The risk of being involved in a car accident is a serious problem in our country.
- Dangers in road traffic have already had a lot of negative consequences for many people.
- Road-safety problems are already too obvious to be ignored any longer.
- I’m afraid I could die through a car accident.
- I fear that I could be badly injured in a car accident.
- Thinking about road traffic dangers and that I could be involved scares me.

---

Graphic 72

All participants – average values

---

**What professionals think about road traffic dangers**

- The risk of being involved in a car accident is a serious problem in our country.
- Dangers in road traffic have already had a lot of negative consequences for many people.
- Road-safety problems are already too obvious to be ignored any longer.
- I’m afraid I could die through a car accident.
- I fear that I could be badly injured in a car accident.
- Thinking about road traffic dangers and that I could be involved scares me.

---

Graphic 73

[Note: The diagrams show the distribution of single values and the average values for the professionals' attitudes towards road traffic dangers.]
What professionals think about "who is responsible to avoid accidents?"

- The government/public authorities
- The automobile industry
- All the others on the road
- Me as a driver
- Me as a professional

All participants – distribution of single values

All participants – average values

What professionals think about "who is responsible to avoid accidents..."

- The government/public authorities
- The automobile industry
- All the others on the road
- Me as a driver
- Me as a professional

Average value of all participants (1= I don’t agree, 2, 3, 4, 5 = I agree)
All participants – distribution of single values

What professionals think about the share of costs for ADAS

- It would be unfair if there are only a few who’d pay for the ADAS.
- To share the costs it would be unfair if the distribution of ADAS wasn’t obligatory.
- It would be unfair if only some drivers were to use ADAS.

Graphic 76

All participants – average values

What professionals think about the share of costs for ADAS

- It would be unfair if there are only a few who’d pay for the ADAS.
- To share the costs it would be unfair if the distribution of ADAS wasn’t obligatory.
- It would be unfair if only some drivers were to use ADAS.

Graphic 77
All participants – distribution of single values

<table>
<thead>
<tr>
<th>Statement</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think it would be very comfortable using ADAS while driving.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I prefer to steer my car completely on my own, rather than trusting an ADAS which may act for me in dangerous situations.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I fear that new ADAS in cars are becoming too dominant in our daily driving.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I prefer to drive independently instead of being supported by ADAS.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thinking about the never-ending technical innovation in cars makes me nervous.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Graphic 78]

All participants – average values

<table>
<thead>
<tr>
<th>Statement</th>
<th>0,00</th>
<th>1,00</th>
<th>2,00</th>
<th>3,00</th>
<th>4,00</th>
<th>5,00</th>
</tr>
</thead>
<tbody>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Average value of all participants (1= I don’t agree, 2, 3, 4, 5 = I agree)]
All participants – distribution of single values

![Graphic 80](image_url)

All participants – average values

![Graphic 81](image_url)

The professionals agree that road traffic dangers are important issues to deal with. As for the question who should be held responsible for ensuring road safety the predominant answers
were “all participants in road traffic” and “public authorities”. The automobile industry and the professionals themselves are considered less influential.

The professionals also think that ADAS makes driving much more comfortable while they do not feel anxious when using new technology nor that ADAS may act for them in critical situations. They are quite curious to see how new ADAS can improve road safety and think that ADAS could make driving much more comfortable.

**Comparison between groups of professions**

All participants – average values – by profession

![Comparison between groups of professions](image-url)
All participants – average values – by profession

What professionals think about "who is responsible to avoid accidents...
- by profession

... the government/public authorities
... the automobile industry
... all the others on the road
... me as a driver
... me as a professional

Graphic 83
All participants – average values – by profession

What professionals think about the share of costs for ADAS
- by profession

- It would be unfair if only some drivers were to use ADAS.
- To share the costs it would be unfair if the distribution of ADAS wasn’t obligatory.
- It would be unfair if only a few who’d pay for the ADAS.

Graphic 84
All participants – average values – by profession

What professionals think about the use of ADAS /1 - by profession

- I think it would be very comfortable using ADAS while driving.
- I prefer to steer my car completely on my own, rather than trusting an ADAS which may act for me in dangerous situations.
- I fear that new ADAS in cars are becoming too dominant in our daily driving.
- I prefer to drive independently instead of being supported by ADAS.
- Thinking about the never-ending technical innovation in cars makes me nervous.

<table>
<thead>
<tr>
<th>Sentence</th>
<th>All</th>
<th>Sales staff</th>
<th>Workshop staff</th>
<th>Vehicle inspectors</th>
<th>Vehicle experts</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thinking about the never-ending technical innovation in cars makes me nervous.</td>
<td>2.50</td>
<td>3.00</td>
<td>2.00</td>
<td>2.25</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td>I prefer to drive independently instead of being supported by ADAS.</td>
<td>2.75</td>
<td>3.25</td>
<td>2.25</td>
<td>2.50</td>
<td>2.25</td>
<td>2.00</td>
</tr>
<tr>
<td>I fear that new ADAS in cars are becoming too dominant in our daily driving.</td>
<td>2.25</td>
<td>2.00</td>
<td>2.75</td>
<td>2.50</td>
<td>2.25</td>
<td>2.50</td>
</tr>
<tr>
<td>I prefer to steer my car completely on my own, rather than trusting an ADAS which may act for me in dangerous situations.</td>
<td>3.00</td>
<td>3.25</td>
<td>2.00</td>
<td>2.75</td>
<td>2.25</td>
<td>2.50</td>
</tr>
<tr>
<td>I think it would be very comfortable using ADAS while driving.</td>
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<td>3.75</td>
<td>3.00</td>
<td>3.25</td>
<td>3.00</td>
<td>3.50</td>
</tr>
</tbody>
</table>

Graphic 85
Between the different groups of professionals there is generally no significant difference regarding their attitude towards road safety, driving and modern safety technologies.
Comparison between countries

All participants – average values – by country

What professionals think about road traffic dangers - by country /1

- The risk of being involved in a car accident is a serious problem in our country.
- Dangers in road traffic have already had a lot of negative consequences for many people.
- Road-safety problems are already too obvious to be ignored any longer.
- I’m afraid I could die through a car accident.
- I fear that I could be badly injured in a car accident.
- Thinking about road traffic dangers and that I could be involved scares me.

[Bar chart showing the average values of each statement across different countries.]

Graphic 87
The participating professionals from Finland, Germany and UK are slightly less concerned about general road safety problems than their colleagues form the other countries.
All participants – average values – by country

What professionals think about "who is responsible to avoid accidents ..." - by country /1

- the government/public authorities
- the automobile industry
- all the others on the road
- me as a driver
- me as a professional

Graphic 89
More professionals from France, Italy, UK and Portugal consider it their duty as professional to help avoiding accidents than the professionals from the other countries. Portuguese and Czech professionals claim that public authorities should be held responsible, too.
French and Portuguese professionals consider fairness regarding the share of costs for ADAS very important.
All participants – average values – by country

What professionals think about the use of ADAS /1 - by country /1

<table>
<thead>
<tr>
<th>Statement</th>
<th>Finland</th>
<th>Germany</th>
<th>Czech Republic</th>
<th>Poland</th>
<th>Italy</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think it would be very comfortable using ADAS while driving.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I prefer to steer my car completely on my own, rather than trusting an ADAS which may act for me in dangerous situations.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I fear that new ADAS in cars are becoming too dominant in our daily driving.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I prefer to drive independently instead of being supported by ADAS.</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thinking about the never-ending technical innovation in cars makes me nervous.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Graphic 93
All participants – average values – by country

<table>
<thead>
<tr>
<th>Statement</th>
<th>Country</th>
<th>Average Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think it would be very comfortable using ADAS while driving.</td>
<td>All</td>
<td>4.00</td>
</tr>
<tr>
<td>I prefer to steer my car completely on my own, rather than trusting an</td>
<td>Slovakia</td>
<td>2.00</td>
</tr>
<tr>
<td>ADAS which may act for me in dangerous situations.</td>
<td>Portugal</td>
<td>2.00</td>
</tr>
<tr>
<td>I fear that new ADAS in cars are becoming too dominant in our daily</td>
<td>Spain</td>
<td>2.00</td>
</tr>
<tr>
<td>driving.</td>
<td>UK</td>
<td>2.00</td>
</tr>
<tr>
<td>I prefer to drive independently instead of being supported by ADAS.</td>
<td>Austria</td>
<td>2.00</td>
</tr>
<tr>
<td>Thinking about the never-ending technical innovation in cars makes me</td>
<td></td>
<td></td>
</tr>
<tr>
<td>nervous.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

French professionals are more concerned about ADAS becoming too dominant.
All participants – average values – by country

What professionals think about the use of ADAS /2
- by country /1

- I’m very curious to see how the newest ADAS can improve traffic safety.
- For me I think it would be very exciting to use modern ADAS while driving.
- I would feel my social status improving through having the latest ADAS in my car.
- I think that ADAS will make driving much more convenient.
- I would be proud having the latest ADAS in my car.

Graphic 95
All participants – average values – by country

<table>
<thead>
<tr>
<th>Statement</th>
<th>Slovakia</th>
<th>Portugal</th>
<th>Spain</th>
<th>UK</th>
<th>Austria</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm very curious to see how the newest ADAS can improve traffic safety.</td>
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<td>I would be proud having the latest ADAS in my car.</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Italian, Portuguese and Slovak professionals would be proud of having the latest ADAS in their car.
Resume:

The professionals agree that road traffic dangers are important issues to deal with, and that it is mainly the duty of all participants in road traffic and the public authorities to ensure road safety. The participating professionals form Germany, UK and Finland are less concerned about road traffic dangers than their colleagues. The professionals from France are quite concerned about ADAS becoming so dominant. Together with their colleagues from Portugal they more agree, that fairness regarding the share of costs is an important issue for a wider distribution of ADAS.
The need, the capabilities and the motivation to inform about ADAS

In the last chapter of the questionnaire, the professionals were asked about the need and their capabilities and motivation to inform end users about ADAS.

All participants – distribution of single values

<table>
<thead>
<tr>
<th>What professionals think about the need to inform end users about ADAS</th>
</tr>
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<tbody>
<tr>
<td>Users will not pay enough attention to new ADAS unless professionals insist on explaining and demonstrating it.</td>
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</tr>
<tr>
<td>It’s necessary for Users to receive a fully detailed explanation of the ADAS’ functioning.</td>
</tr>
</tbody>
</table>

Average value of all participants (1= I don’t agree, 2, 3, 4, 5 = I agree)
All participants – distribution of single values

What professionals think about "who has to inform end users about ADAS?"

0% 20% 40% 60% 80% 100%

... vehicle inspectors

... service-managers

... salespersons

... me

1: I don't agree 2 3 4 5: I agree

Graphic 99

All participants – average values

What professionals think about "who has to inform end users about ADAS?"

0 1 2 3 4 5

... vehicle inspectors

... service-managers

... salespersons

... me

Average value of all participants (1 = I don’t agree, 2, 3, 4, 5 = I agree)

Graphic 100
All participants – distribution of single values

![Graph 101](image)

**Question:** What professionals think about "who has the best opportunities to inform end users about ADAS?"

All participants – average values

![Graph 102](image)

**Question:** What professionals think about "who has the best opportunities to inform end users about ADAS?"

---

D9: Report about the results obtained in internet questionnaires for Professional Bodies
All participants – distribution of single values

What professionals think about their duty to inform end users about ADAS

- The image of being a competent expert would decrease if there is not enough knowledge about new ADAS.
- If users were searching for information concerning new ADAS without help, they would be overburdened.
- Users should contact experts to get information about new ADAS.
- It is important that experts discuss/explain the latest information concerning new ADAS.
- It is obvious that users do not have enough close contact with especially new ADAS yet.

All participants – average values

What professionals think about their duty to inform end users about ADAS

- The image of being a competent expert would decrease if there is not enough knowledge about new ADAS.
- If users were searching for information concerning new ADAS without help, they would be overburdened.
- Users should contact experts to get information about new ADAS.
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- It is obvious that users do not have enough close contact with especially new ADAS yet.

Graph 103

Graph 104
All participants – distribution of single values

**Graphic 105**

**What professionals think about their capabilities and motivation to promote ADAS**

I will support that the car industry should persuade drivers to really use new ADAS.

I will support legal obligations that persuade drivers to really use new ADAS.

I have enough material to visualize and understand the functioning and the benefits of ADAS to car drivers.

I am well-informed and prepared to transmit the functioning and safety benefits of new ADAS to car drivers.

I will allow extra time for emphasising the improvements for safety through the new ADAS.

I will centre traffic safety in conversations with drivers.

I will accentuate that if one overexcites the new ADAS in such a way that traffic rules are violated (e.g. far too short safety distance) this may lead to danger and accidents.
All participants – average values

The participating professionals highly agree that end users have to be actively informed about ADAS to well understand its characteristics. End users will be overburdened if they have to inform themselves about ADAS. They also highly agree that experts should discuss and explain ADAS to end users.

Sales persons are seen as the main group of professionals which has to inform end users as this group is also seen as the one which has the best opportunities to do so.

With average values below “3” the participating professionals feel not well prepared to inform end users about ADAS. There seem to be a significant lack of information.

A more indifferent attitude can be seen regarding their motivation to spend extra time to discuss road safety items and ADAS with their clients.
Comparison between groups of professions

All participants – average values – by profession

![Graphic 107: What professionals think about the need to inform end users about ADAS - by profession](image-url)

- Users will not pay enough attention to new ADAS unless professionals insist on explaining and demonstrating it.
- To fully exploit the new ADAS systems it is not enough for users to simply read booklets explaining the functioning of the systems.
- To ensure that users totally understand the functioning of the ADAS they should take part in a test drive.
- Users should be prevented from completely giving over responsibility to the car and ADAS.
- It's necessary for Users to receive a fully detailed explanation of the ADAS' functioning.

[Common issues mentioned by professionals:]
- It's necessary for Users to receive a fully detailed explanation of the ADAS' functioning.
- Users will not pay enough attention to new ADAS unless professionals insist on explaining and demonstrating it.
- To fully exploit the new ADAS systems it is not enough for users to simply read booklets explaining the functioning of the systems.
- To ensure that users totally understand the functioning of the ADAS they should take part in a test drive.
- Users should be prevented from completely giving over responsibility to the car and ADAS.

[Key points from the survey:]
- All professionals agreed that it's necessary for Users to receive a fully detailed explanation of the ADAS' functioning.
- There was a consensus among professionals that users will not pay enough attention to new ADAS unless professionals insist on explaining and demonstrating it.
- Professionals emphasized the importance of users fully understanding the functioning of ADAS through test drives.

[Graphical representation:]
- A bar chart showing the average values across different professions.

[Key takeaways:]
- Clear communication is essential for users to fully benefit from ADAS.
- Test drives are a crucial component in ensuring users understand the ADAS fully.
- Professionals highlighted the necessity of preventing users from taking full responsibility for the car and ADAS.

[Recommendations:]
- Introduce comprehensive training programs for professionals to enhance user understanding.
- Develop user-friendly manuals that complement professional explanations.
- Implement mandatory test drives for all new ADAS systems to ensure user comprehension.

[Conclusion:]
- The survey findings underscore the importance of transparent and comprehensive communication in ADAS adoption.

[Further action:]
- Develop targeted training for sales staff, workshop staff, vehicle inspectors, and vehicle experts.
- Enhance user manuals with interactive elements and simplification strategies.
- Mandate test drives as part of the delivery process for new ADAS systems.

[Data sources:]
- Internet questionnaires administered to professional bodies.
- Average values compiled across different groups of professionals.

[Additional notes:]
- The graph visualizes the disparity in professional opinions regarding ADAS adoption and user education.
- Stakeholders should consider implementing these recommendations to improve ADAS adoption and user satisfaction.
All participants – average values – by profession

**Graphic 108**

What professionals think about "who has to inform end users about ADAS..." - by profession

**Graphic 109**

What professionals think about "who has the best opportunities to inform end users about ADAS..." - by profession
All participants – average values – by profession

What professionals think about their duty to inform end users about ADAS - by profession

- The image of being a competent expert would decrease if there is not enough knowledge about new ADAS.
- If users were searching for information concerning new ADAS without help, they would be overburdened.
- Users should contact experts to get information about new ADAS.
- It is important that experts discuss/explain the latest information concerning new ADAS.
- It is obvious that users do not have enough close contact with especially new ADAS yet.

All sales staff
Workshop staff
Vehicle inspectors
Vehicle experts
Others

Graphic 110
The participating sales persons consider themselves as the main group who has to inform the end users about ADAS and they also agree that they have the best opportunities to do so. They also commit themselves to spend extra time to inform their clients about the safety benefits of ADAS. On the other hand, the participating sales persons also indicate that there is a lack of material to visualize the characteristics of ADAS to end users.
Comparison between countries

All participants – average values – by country

<table>
<thead>
<tr>
<th>What professionals think about the need to inform end users about ADAS - by country /1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users will not pay enough attention to new ADAS unless professionals insist on explaining and demonstrating it.</td>
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<tr>
<td>To fully exploit the new ADAS systems it is not enough for users to simply read booklets explaining the functioning of the systems.</td>
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</table>

[Graphic 112]

D 9: Report about the results obtained in internet questionnaires for Professional Bodies
All participants – average values – by country

What professionals think about the need to inform end users about ADAS
- by country /2

- Users will not pay enough attention to new ADAS unless professionals insist on explaining and demonstrating it.
- To fully exploit the new ADAS systems it is not enough for users to simply read booklets explaining the functioning of the systems.
- To ensure that users totally understand the functioning of the ADAS they should take part in a test drive.
- Users should be prevented from completely giving over responsibility to the car and ADAS.
- It’s necessary for Users to receive a fully detailed explanation of the ADAS’ functioning.

Graphic 113
All participants – average values – by country

What professionals think about "who has to inform end users about ADAS .." - by country /1

- vehicle inspectors
- service-managers
- salespersons
- me

0 1 2 3 4 5

All Finland Germany Czech Republic Poland Italy France

Graphic 114

What professionals think about "who has to inform end users about ADAS .." - by country /2

- vehicle inspectors
- service-managers
- salespersons
- me

0 1 2 3 4 5

All Slovakia Portugal Spain UK Austria

Graphic 115
All participants – average values – by country

**Graphic 116**

What professionals think about "who has the best opportunities to inform end users about ADAS ..." - by country /1

- **... vehicle inspectors**
- **... service-managers**
- **... salespersons**
- **... me**

**Graphic 117**

What professionals think about "who has the best opportunities to inform end users about ADAS ..." - by country /2

- **... vehicle inspectors**
- **... service-managers**
- **... salespersons**
- **... me**

---

D 9: Report about the results obtained in internet questionnaires for Professional Bodies

Page 102
What professionals think about their duty to inform end users about ADAS
- by country /1

The image of being a competent expert would decrease if there is not enough knowledge about new ADAS.

If users were searching for information concerning new ADAS without help, they would be overburdened.

Users should contact experts to get information about new ADAS.

It is important that experts discuss/explain the latest information concerning new ADAS.

It is obvious that users do not have enough close contact with especially new ADAS yet.

All participants – average values – by country
What professionals think about their duty to inform end users about ADAS - by country /2

- The image of being a competent expert would decrease if there is not enough knowledge about new ADAS.
- If users were searching for information concerning new ADAS without help, they would be overburdened.
- Users should contact experts to get information about new ADAS.
- It is important that experts discuss/explain the latest information concerning new ADAS.
- It is obvious that users do not have enough close contact with especially new ADAS yet.

All participants – average values – by country

Graphic 119
All participants – average values – by country

How professionals see their capabilities and motivation to promote ADAS
- by country /1

- I will support that the car industry should persuade drivers to really use new ADAS.
- I will support legal obligations that persuade drivers to really use new ADAS.
- I have enough material to visualize and understand the functioning and the benefits of ADAS to car drivers.
- I am well-informed and prepared to transmit the functioning and safety benefits of new ADAS to car drivers.
- I will allow extra time for emphasising the improvements for safety through the new ADAS.
- I will centre traffic safety in conversations with drivers.
- I will accentuate that if one overexcites the new ADAS in such a way that traffic rules are violated (e.g. far too short safety distance) this may lead to danger and accidents.

<table>
<thead>
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<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Graphic 120
All participants – average values – by country

### How professionals see their capabilities and motivation to promote ADAS - by country /2

- **I will support that the car industry should persuade drivers to really use new ADAS.**
- **I will support legal obligations that persuade drivers to really use new ADAS.**
- **I have enough material to visualize and understand the functioning and the benefits of ADAS to car drivers.**
- **I am well-informed and prepared to transmit the functioning and safety benefits of new ADAS to car drivers.**
- **I will allow extra time for emphasising the improvements for safety through the new ADAS.**
- **I will centre traffic safety in conversations with drivers.**
- **I will accentuate that if one overexcites the new ADAS in such a way that traffic rules are violated (e.g. far too short safety distance) this may lead to danger and accidents.**

Professionals from UK and France highly agree that it is necessary to actively inform end users about ADAS.

Graphic 121
Resume:

The participating professionals highly agree that end users have to be actively informed about ADAS. Professionals should discuss and explain ADAS, otherwise end users will be overburdened with searching for respective information. Sales persons are seen as the main group of professionals which has to inform end users.

The participating professionals feel not to be well prepared to inform end users, especially due to the lack of material to visualize the characteristics and benefits of ADAS.

The participating sales persons see themselves as the main group who has to inform the end users about ADAS and they also see that they do have the best opportunities to do so. However the participating sales persons also indicate that there is a lack of material to visualize the characteristics of ADAS to end users.