



Aviva Consumer Attitudes survey

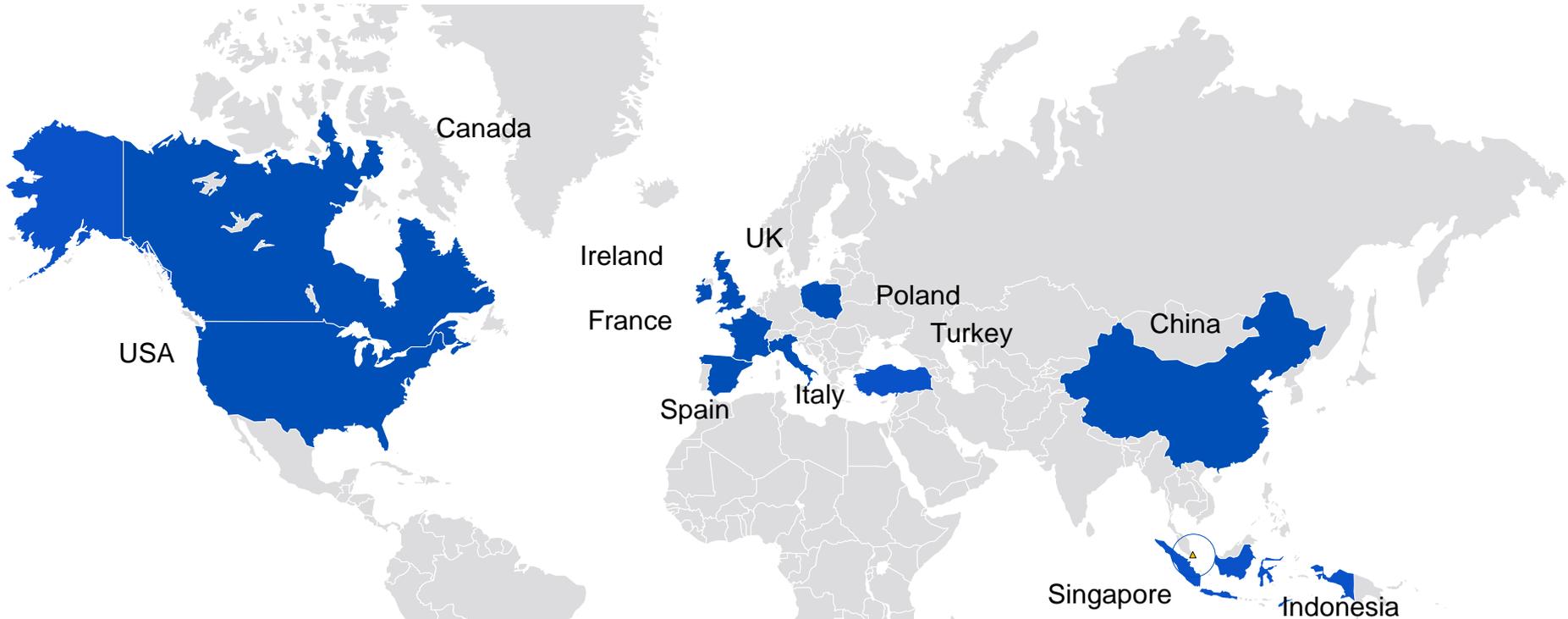
Focus on Auto

March 2017

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CAS Market Coverage – March 2017



- 1,000 interviews in each market, except China where 1515 interviews are conducted
- Urban representative sample in China. Representative sample in all other markets and weighted to an existing profile of the adult population to ensure consistency with previous waves.
- Interviews were conducted using online panels in all markets, with the exception of China which used a mixed methodology (online and face-to-face). Online panellists reflect the proportion of the population who are online, and broader demographic coverage would be required for increased representation.
- Interviews conducted in core markets 17th March – 1st May 2017
- USA included due to importance to global economy – 22% of global GDP (2012, IMF)

Distractions while driving: Context

Drivers face many forms of distraction on the road with increased use of technology adding to the problem. Many governments have introduced laws to combat this.



Distractions while driving: Context

Different countries have taken different approaches to tackling distracted drivers with some being far more lenient than others.



United Kingdom

Alcohol limit: 0.08% (England and Wales)
0.05% (Scotland)

Distractions: Eating or drinking while driving aren't specifically illegal, however police can prosecute for careless driving

Technology: Using a mobile phone while driving is punishable by six points on a licence as well as a fine.

Speed: 70mph on motorways



China

Alcohol limit: 0.02%

Distractions: Fines can be imposed on drivers who are caught smoking while driving.

Technology: Use of handheld mobile phones is illegal.

Speed: 75mph on expressways



India

Alcohol limit: 0.03%

Distractions: Smoking can result, in some circumstances to driving licence being revoked

Technology: Use of handheld mobile phones is illegal.

Speed: 75mph on motorways



Canada

Alcohol limit: 0.08%

Distractions: Eating or drinking can fall under the category of distracted driving which can incur penalties.

Technology: Penalties for using mobile phones while driving can go as far as revoking a licence,.

Speed: 75mph on motorways

Use of technology while driving

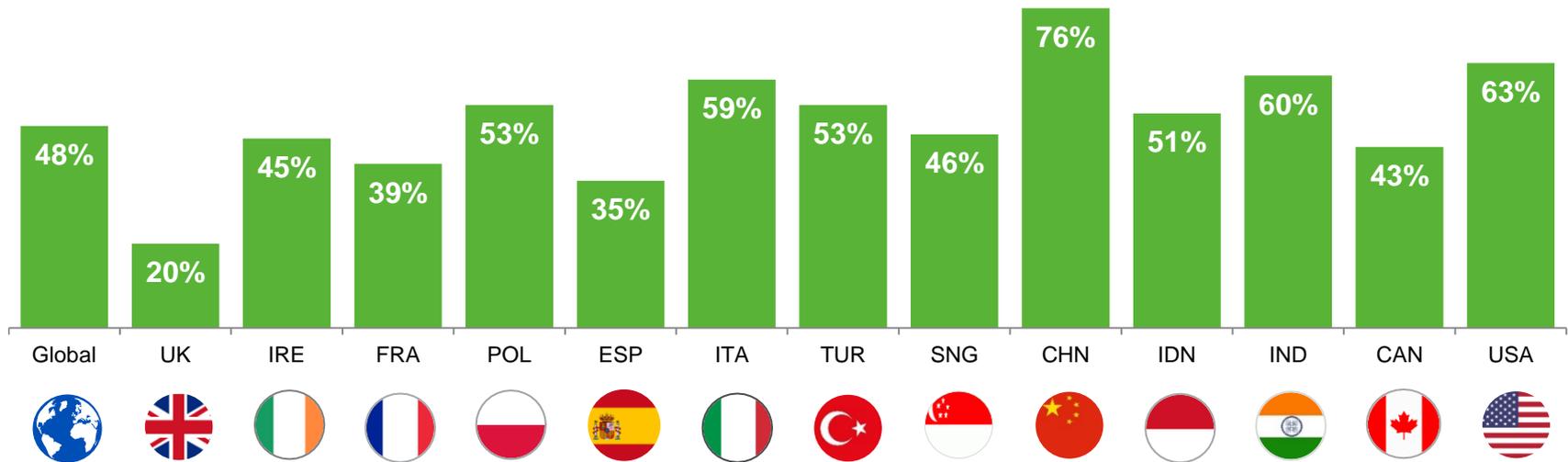


“Made a call”

Chinese and American drivers are the most likely to admit making a call while driving while motorists in the UK are less likely.

“Made a call”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

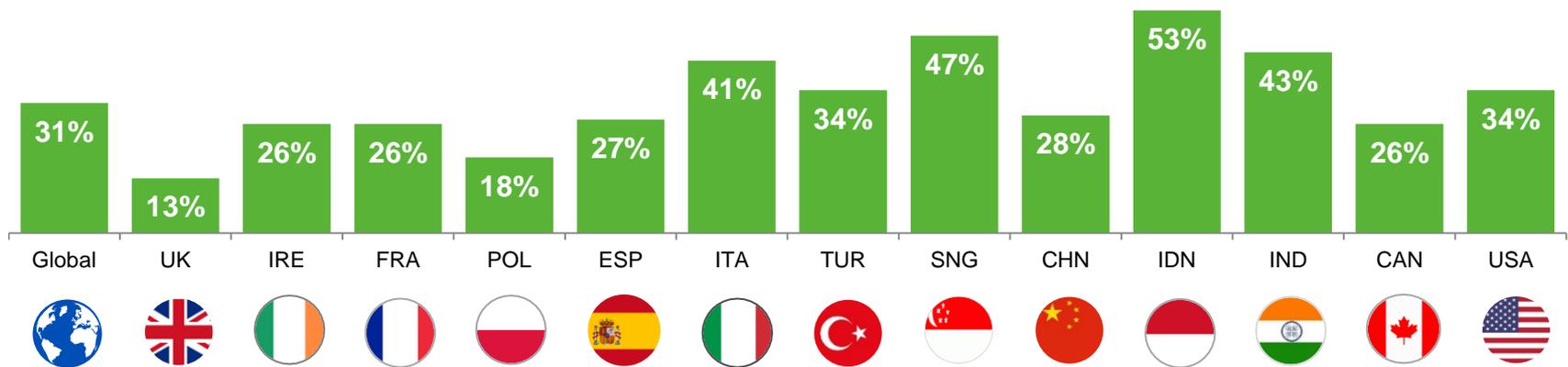


“Send a message via text, Whatsapp, Facebook, etc”

Indonesian drivers are the most likely to admit sending a text while UK drivers continue the trend of being less likely to use mobile phones behind the wheel.

“Send a message via text, Whatsapp, Facebook, etc”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

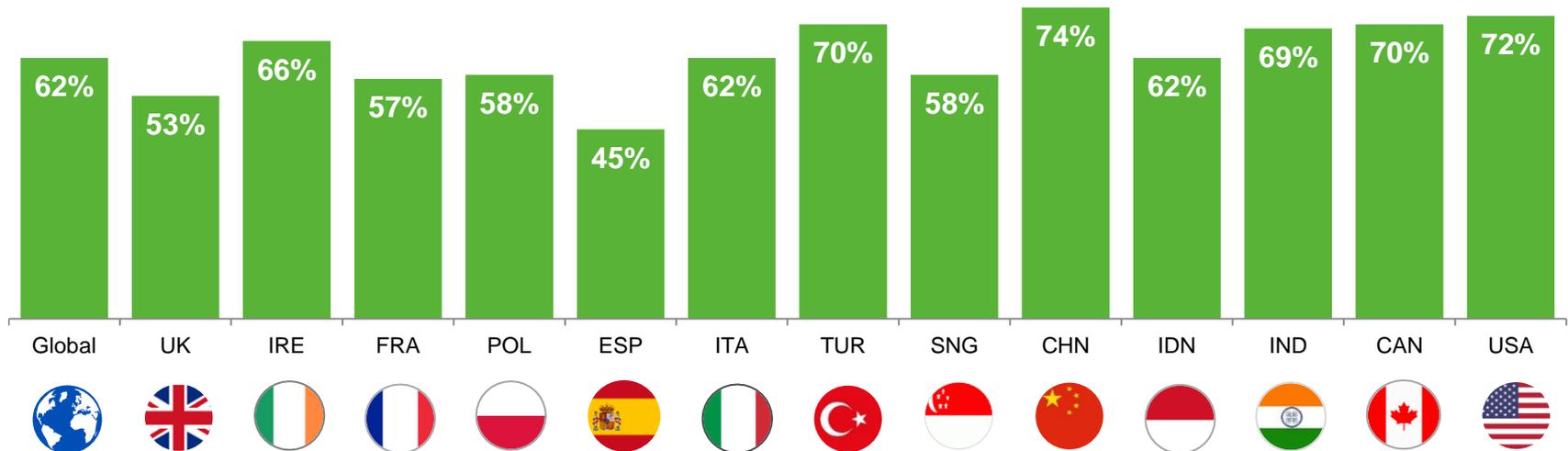


“Choose music”

Choosing music while driving is fairly common across all markets with over one in two admitting to this in all markets other than Spain.

“Choose music”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

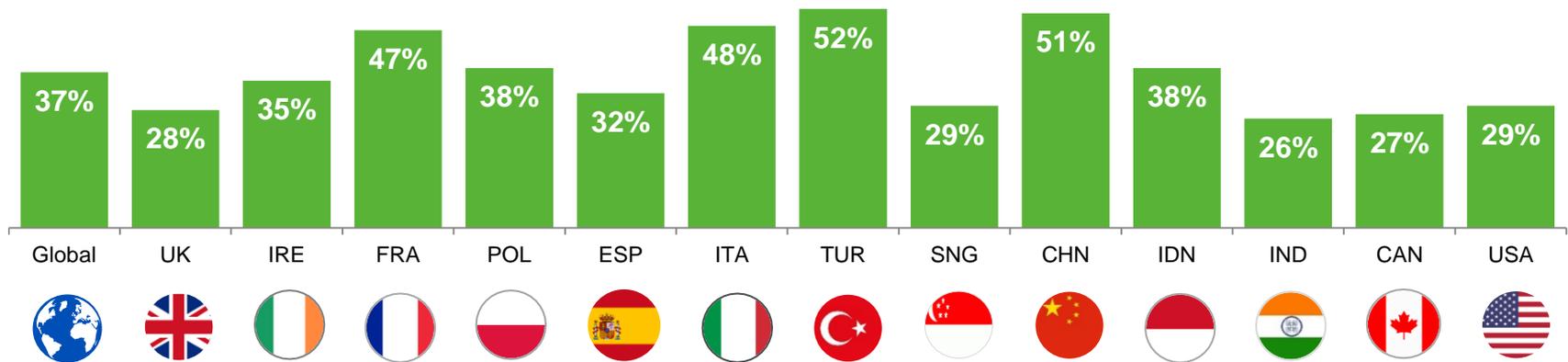


“Enter information into a sat-nav”

Usage of sat-nav devices varies across markets with Turkey being the most likely to use these and India the least.

“Enter information into a sat-nav”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

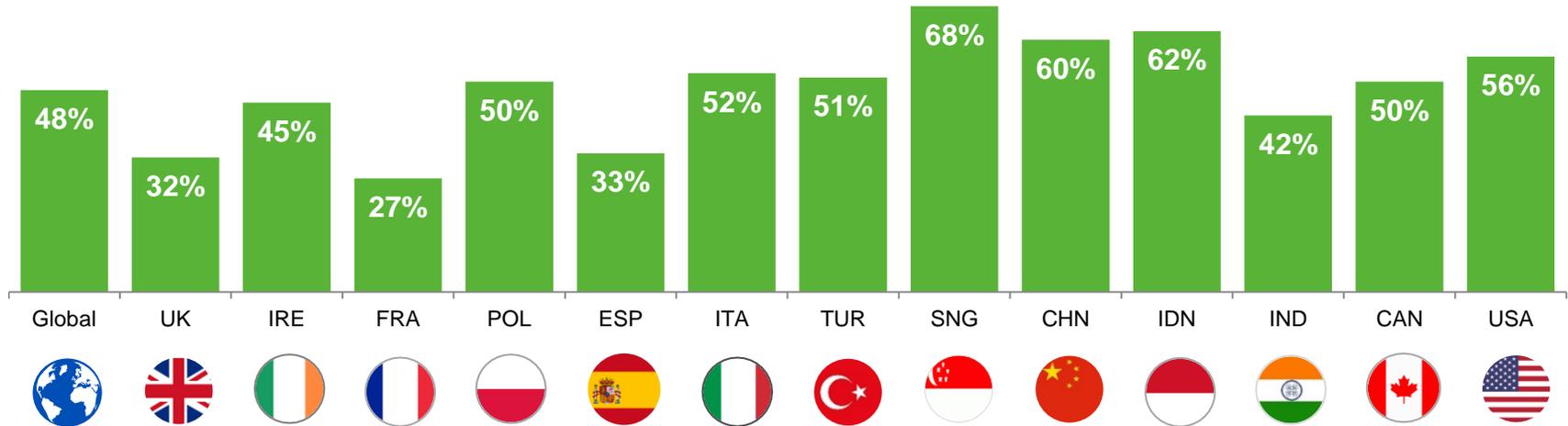


“Look at a map (printed or on an app)”

Looking at a map while driving is particularly common in the Asian markets of Singapore, China and Indonesia.

“Look at a map (printed or on an app)”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology



Activities done while driving

Respondents across all markets are far more likely to admit carrying out one of these activities although this is less the case in Spain and the UK.

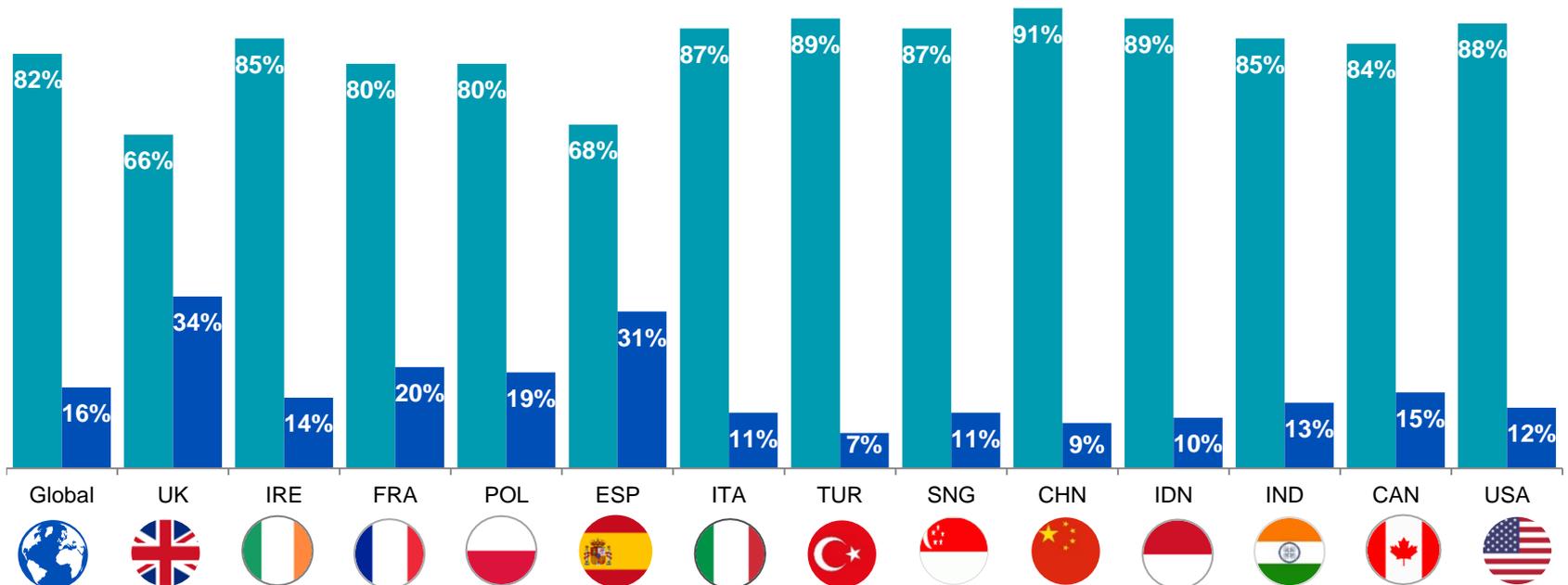
Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

Those who admit illegal activity*

Those who claim no illegal activity**

*Those who admit at least one activity

** Those who do not admit to any activity



Usage of technology while driving

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

% who have carried out activity	Global	UK	IRE	FRA	POL	ESP	ITA	TUR	SNG	CHN	IDN	IND	CAN	USA
														
Make a call	48%	20%	45%	39%	53%	35%	59%	53%	46%	76%	51%	60%	43%	63%
Send a message via text, Whatsapp, Facebook, etc	31%	13%	26%	26%	18%	27%	41%	34%	47%	28%	53%	43%	26%	34%
Check or post on social media e.g. Twitter/ Facebook	17%	7%	15%	8%	14%	11%	17%	22%	23%	11%	29%	41%	11%	22%
View, take or upload images onto social media	14%	4%	11%	5%	13%	8%	16%	22%	18%	23%	26%	37%	7%	17%
Choose Music	62%	53%	66%	57%	58%	45%	62%	70%	58%	74%	62%	69%	70%	72%
Enter information into a sat-nav	37%	28%	35%	47%	38%	32%	48%	52%	29%	51%	38%	26%	27%	29%
Look at a map (printed or on an app)	48%	32%	45%	27%	50%	33%	52%	51%	68%	60%	62%	42%	50%	56%
Switch on or unlock a mobile phone	45%	24%	47%	39%	45%	37%	50%	60%	49%	62%	56%	53%	39%	45%

 Over-Index  Under Index (compared to average score for the activity)

Social media usage while driving

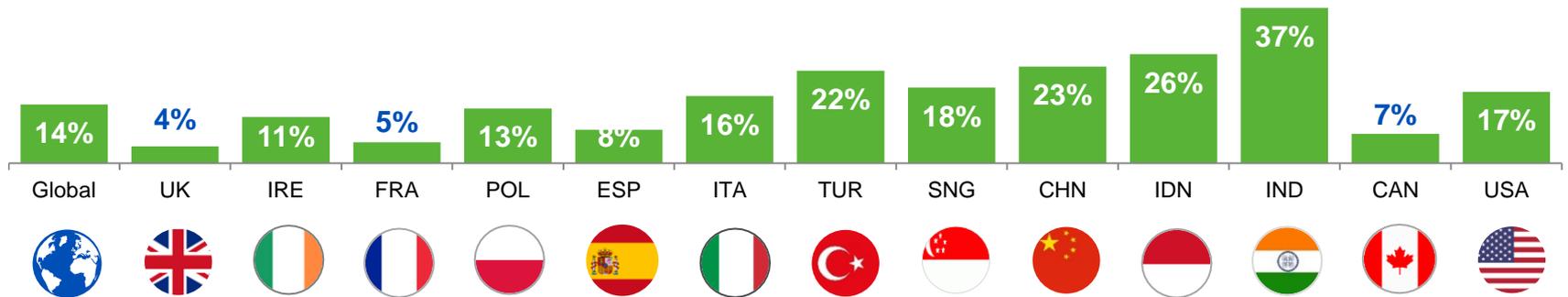


“View, take or upload images onto social media”

Taking or uploading pictures while driving is highest in India and lowest in the UK.

“View, take or upload images onto social media”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

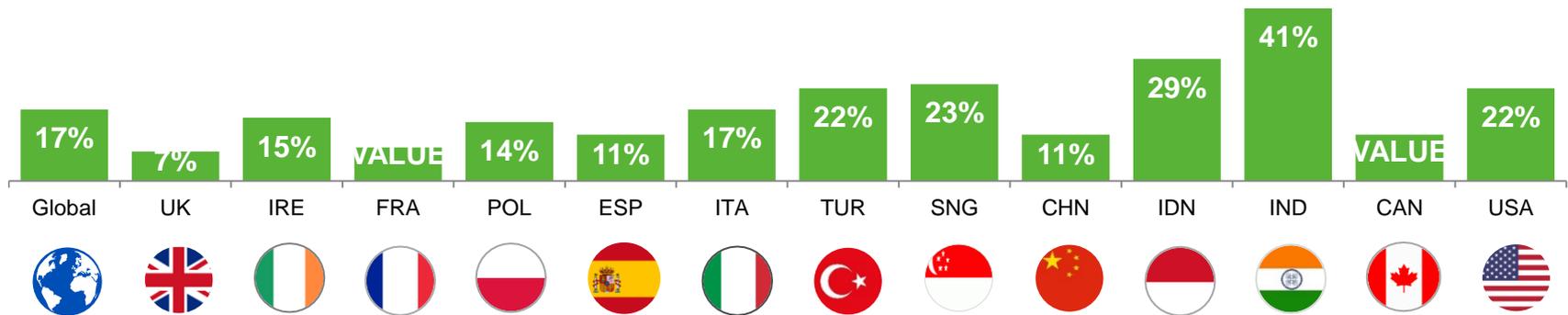


“Check or post on social media e.g. Twitter/ Facebook”

Almost four in ten Indians admit to checking or posting on social media while driving, in the UK this figure is less than one in ten.

“Check or post on social media e.g. Twitter/ Facebook”

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology



Attitudes to speeding



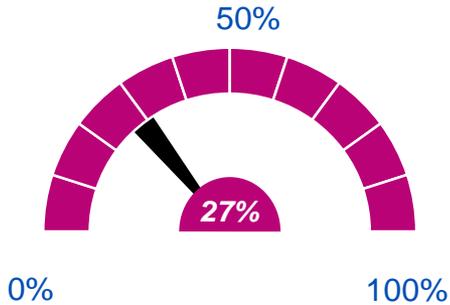
Attitudes to speeding

The majority of drivers in the UK and globally admit to occasionally breaking the speed limit.

“Which of the following best describes your speed when driving?”

United Kingdom

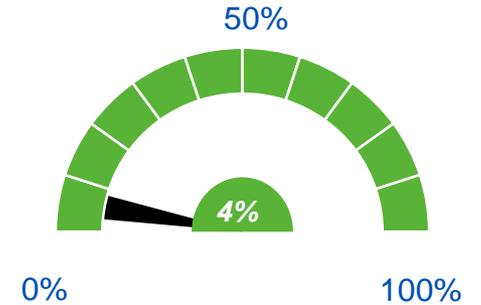
Law abiding motorists



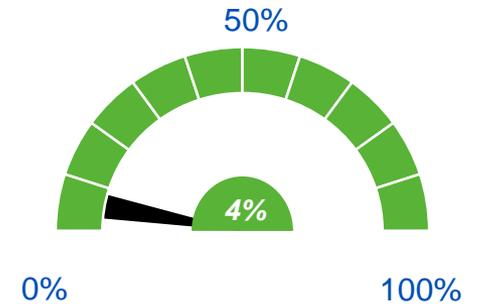
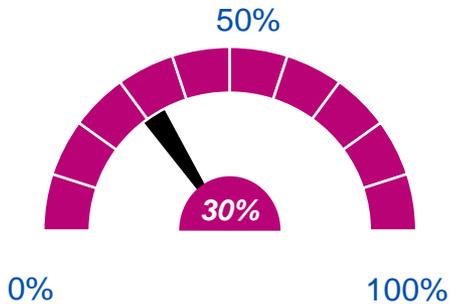
Occasional speed infringers



Serial Speed offenders



Global



"I always obey the speed limit"

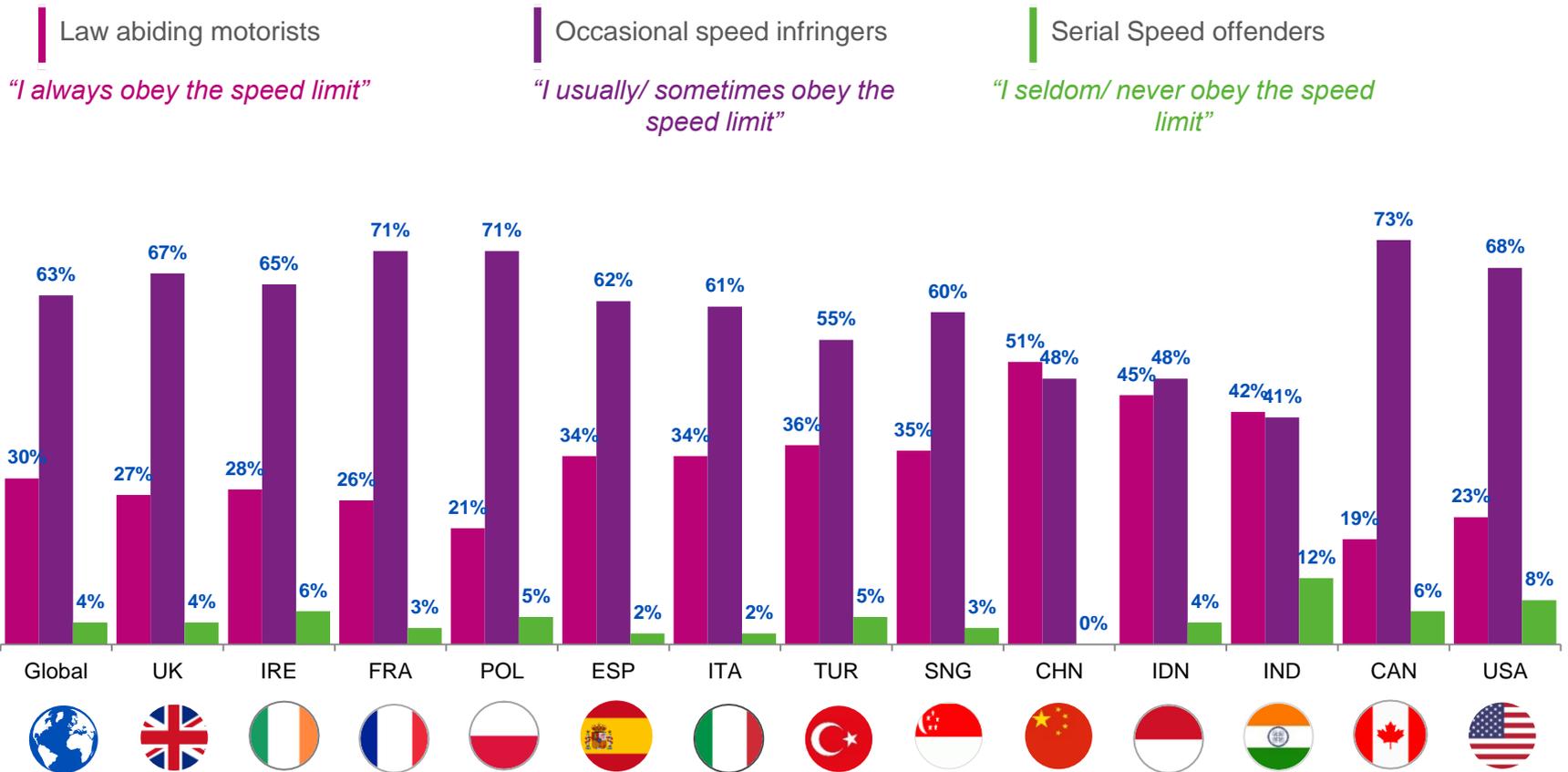
"I usually/ sometimes obey the speed limit"

"I seldom/ never obey the speed limit"

Attitudes to speeding

Chinese drivers are the most likely to state they always obey the speed limit while Canadians are the least likely

“Which of the following best describes your speed when driving?”



Attitudes to speeding: Summary

“Which of the following best describes your speed when driving?”

	Global	UK	IRE	FRA	POL	ESP	ITA	TUR	SNG	CHN	IDN	IND	CAN	USA
														
I always obey speed limits	30%	27%	28%	26%	21%	34%	34%	36%	35%	51%	45%	42%	19%	23%
I usually obey speed limits	52%	59%	55%	62%	57%	56%	51%	43%	48%	45%	37%	30%	58%	53%
I sometimes obey the speed limits (about half the time)	11%	8%	10%	9%	14%	6%	10%	12%	12%	3%	11%	11%	15%	15%
I seldom obey the speed limits	3%	3%	4%	3%	4%	2%	2%	3%	2%	0%	3%	7%	5%	5%
I never obey the speed limits	1%	1%	2%	0%	1%	0%	0%	2%	1%	0%	1%	5%	1%	3%

■ Over-Index ■ Under Index (compared to average score for the activity)

Activities done while driving

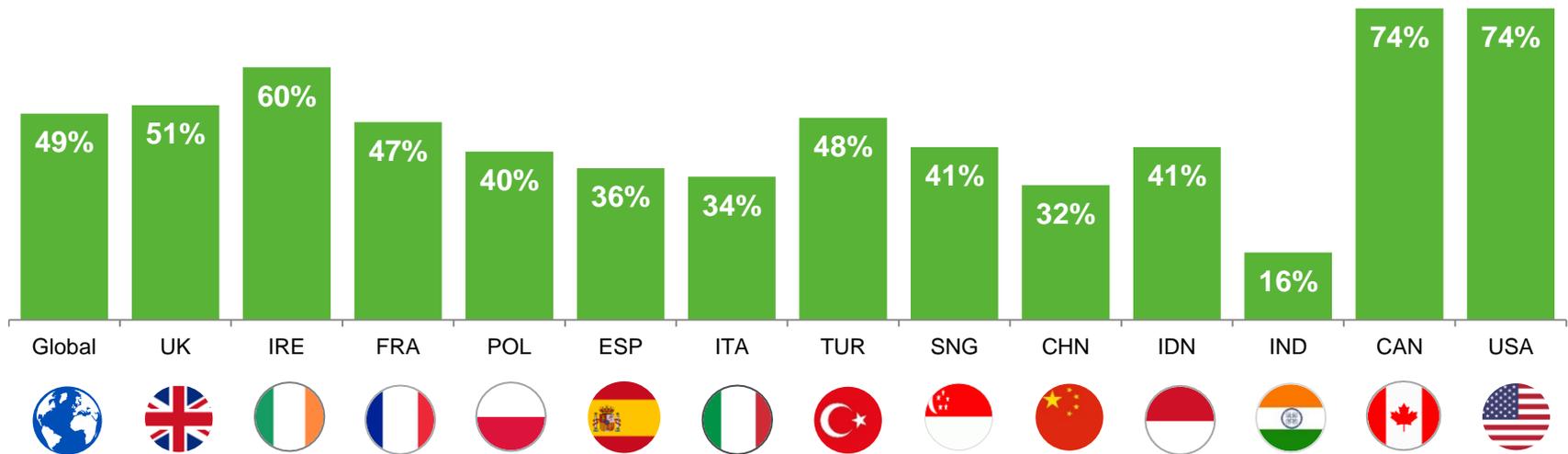


“Driven while eating / drinking”

Driving while eating or drinking is much more common in the North American markets with three in four having done so, in comparison to only one in six Indian drivers.

“Driven while eating / drinking”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

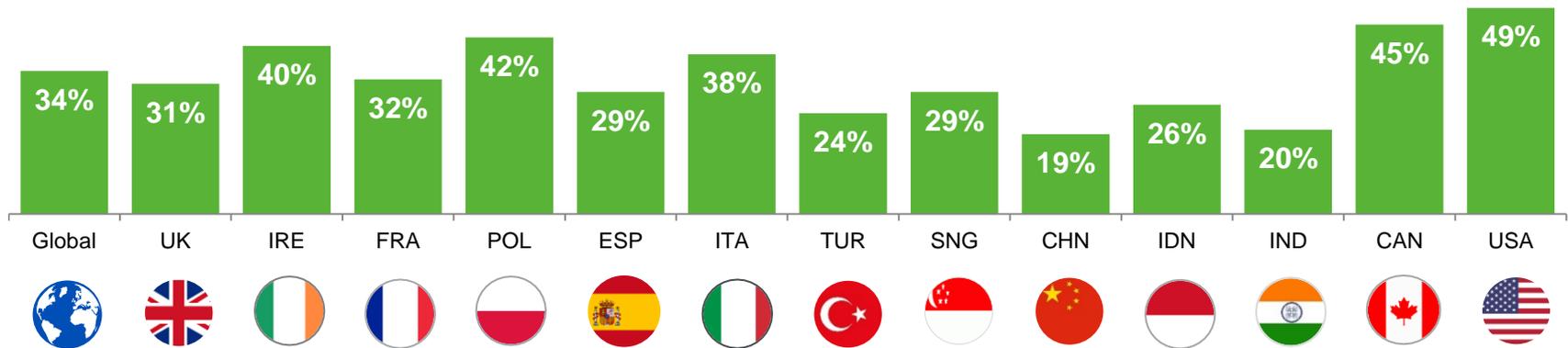


“Driven while excessively tired”

Similarly, Canada and the USA are the most likely to admit to driving while excessively tired with almost a half of drivers having driven while excessively tired in the USA.

“Driven while excessively tired”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

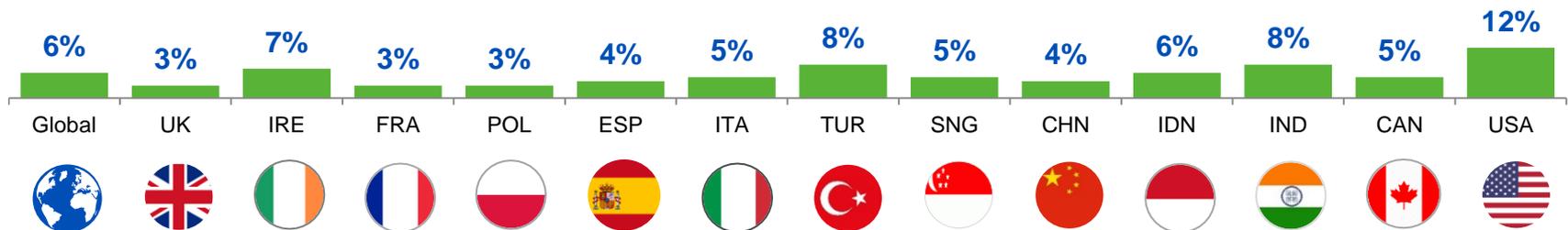


“Driven while putting on make-up”

Few customers globally admit to driving while putting on make-up however in the USA over one in ten state they have carried out this behaviour, twice the global average.

“Driven while putting on make-up”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

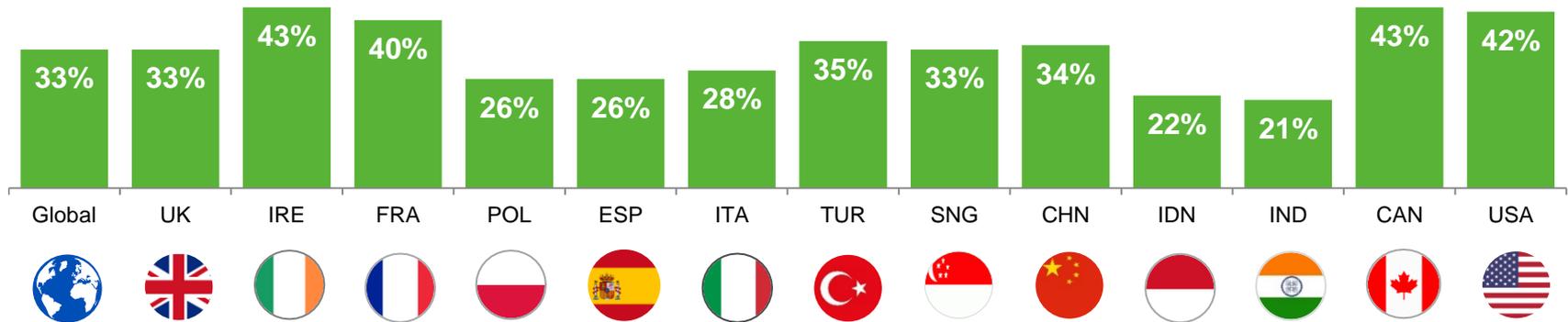


“Been distracted by other people in the vehicle e.g. children in the back of the car”

Being distracted by other people is most common in Ireland, Canada and the USA.

“Been distracted by other people in the vehicle e.g. children in the back of the car”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

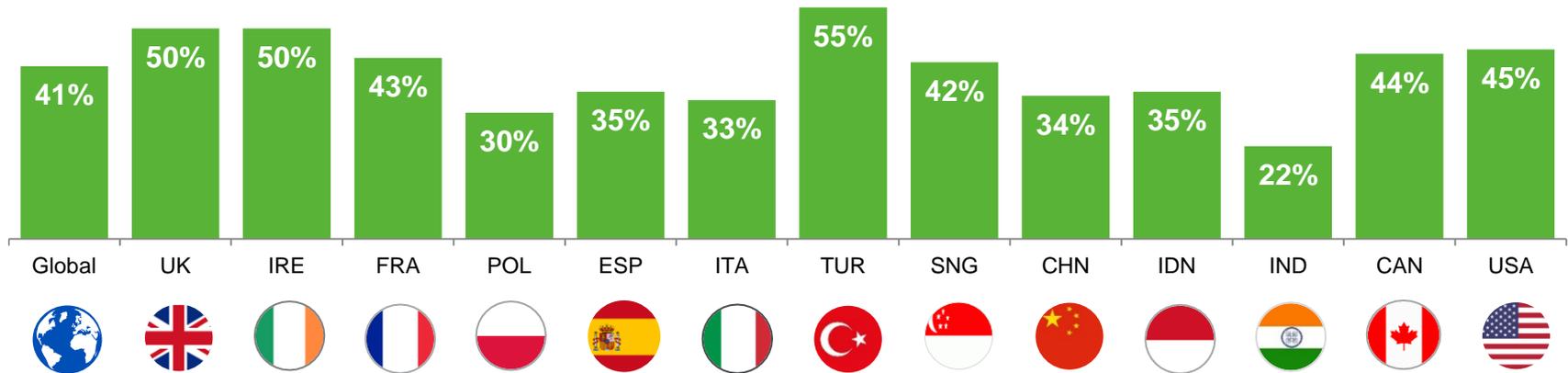


“Experienced ‘road rage’ (either from other drivers or feeling angry yourself)”

Road rage is most common in Turkey although is also widespread in Ireland and the UK with half of drivers stating they have experienced this.

“Experienced ‘road rage’ (either from other drivers or feeling angry yourself)”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

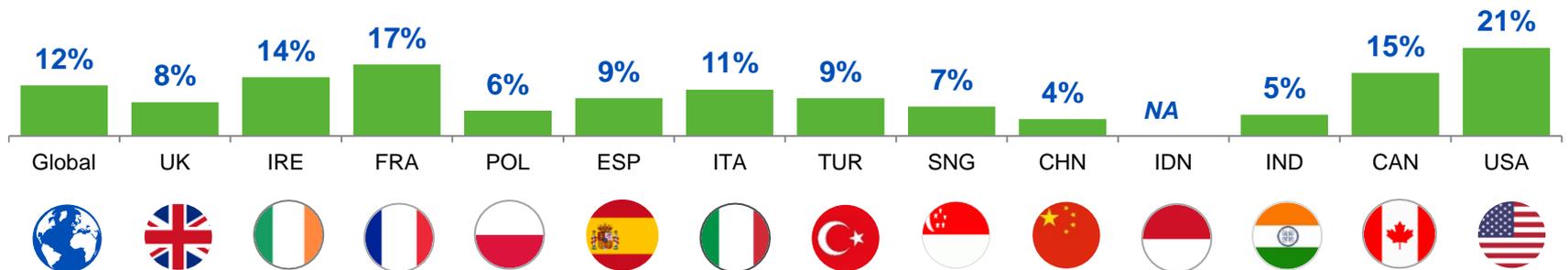


“Driven after drinking alcohol (e.g. Over the legal limit in your country)”

One in five Americans admit to drink driving, the highest proportion globally and almost twice the global average.

“Driven after drinking alcohol (e.g. Over the legal limit in your country)”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

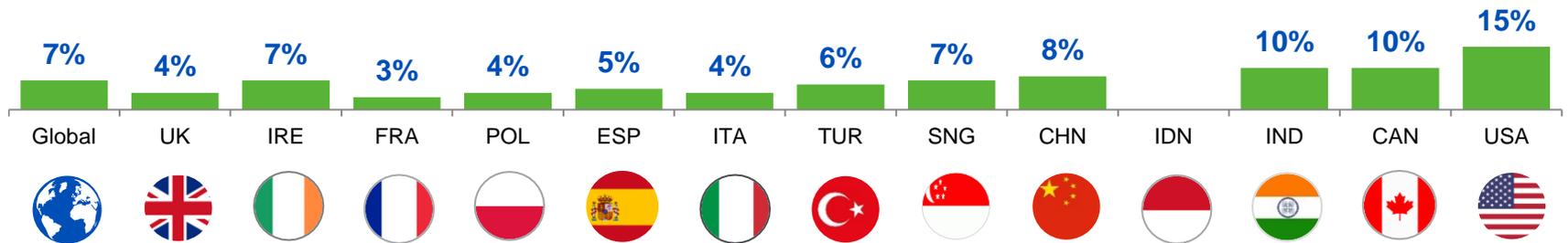


“Driven under the influence of drugs/ medication that could have affected your driving”

Americans are also the most likely to admit driving under the influence of drugs with one in six admitting this; almost four times more than in the UK.

“Driven under the influence of drugs/ medication that could have affected your driving”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

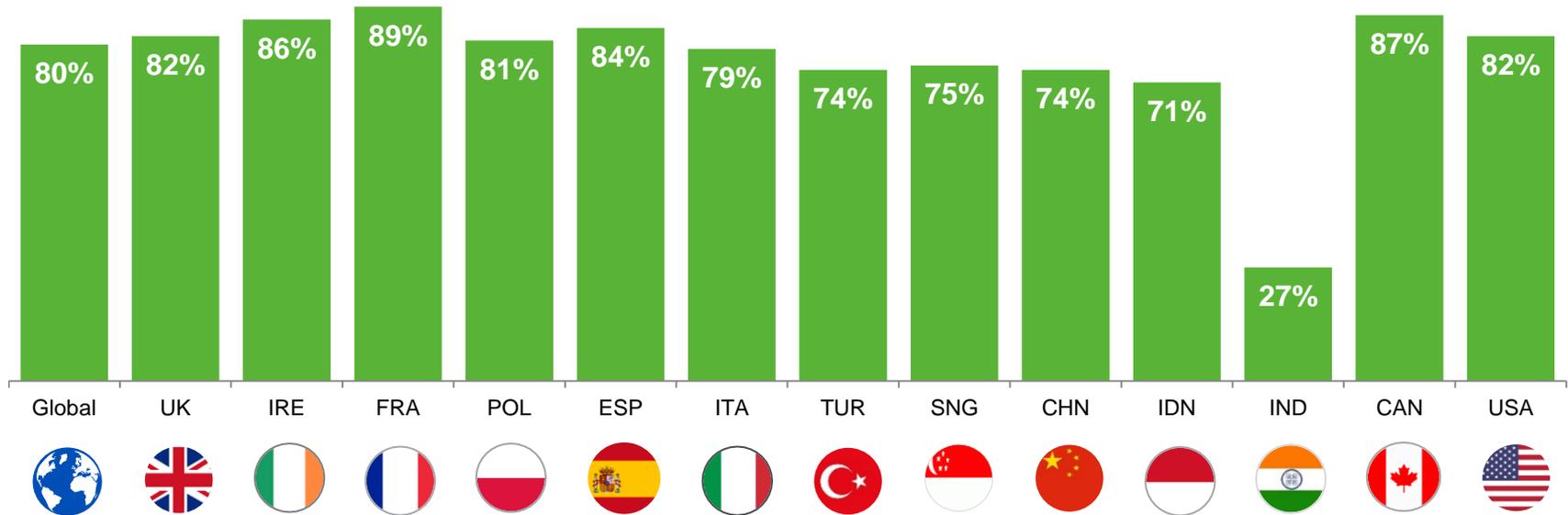


“Driven while talking/ chatting to others in the car”

Driving while talking to others is common across all markets although much less so in India.

“Driven while talking/ chatting to others in the car”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.

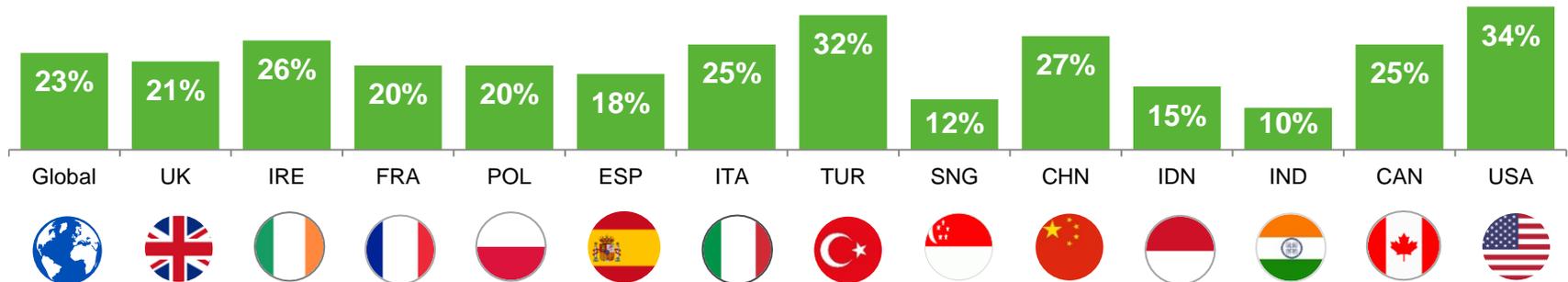


“Driven while smoking”

Americans are the most likely to admit to driving while smoking while Indians are the least likely.

“Driven while smoking”

Which, if any, of the following have you ever done or experienced while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response.



Speed when driving

Which, if any, of the following have you ever done while driving? Please include when the vehicle was stationary but the engine was running (e.g. at traffic lights) in your response but exclude any done while using hands-free technology

	Global	UK	IRE	FRA	POL	ESP	ITA	TUR	SNG	CHN	IDN	IND	CAN	USA
% who have carried out activity														
Driven while eating / drinking	49%	51%	60%	47%	40%	36%	34%	48%	41%	32%	41%	16%	74%	74%
Driven while excessively tired	34%	31%	40%	32%	42%	29%	38%	24%	29%	19%	26%	20%	45%	49%
Driven while putting on make-up	6%	3%	7%	3%	3%	4%	5%	8%	5%	4%	6%	8%	5%	12%
Been distracted by other people in the vehicle e.g. children in the back of the car	33%	33%	43%	40%	26%	26%	28%	35%	33%	34%	22%	21%	43%	42%
Experienced 'road rage' (either from other drivers or feeling angry myself)	41%	50%	50%	43%	30%	35%	33%	55%	42%	34%	35%	22%	44%	45%
Driven after drinking alcohol (e.g. over the legal limit in our country)	12%	8%	14%	17%	6%	9%	11%	9%	7%	4%	NA	5%	15%	21%
Driven under the influence of drugs / medication that could have affected your driving	7%	4%	7%	3%	4%	5%	4%	6%	7%	8%	NA	10%	10%	15%
Driven while talking/ chatting to others in the car	80%	82%	86%	89%	81%	84%	79%	74%	75%	74%	71%	27%	87%	82%
Driven while smoking	23%	21%	26%	20%	20%	18%	25%	32%	12%	27%	15%	10%	25%	34%

Over-Index Under Index (compared to average score for the activity)

Key Contacts and methodology



Aviva's Consumer Attitudes Survey – Key Contacts

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Ipsos

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Thank you

We hope you are feeling inspired.