

12th Allianz Motor Day

Safety of vulnerable road users in urban areas with a focus on trucks and vans as additional road users

Representative online survey

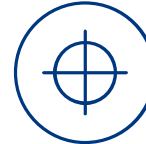


Objectives and study structure



Objective

- Study on experiences, safety perceptions, potential concerns and conflicts between heavy vehicles and vulnerable road users in urban areas



Target group/ sample

1. general road users: population over 18 years of age, with exposure as vulnerable road users: pedestrians, cyclists, etc. in urban areas

Germany n=1,226

Italy n=1,027

France n=1,005

United Kingdom n=1,027

Spain n=1,030

2. boost sample “drivers of heavy vehicles“: e.g. truck and delivery traffic, "part-time drivers“, "unskilled drivers" e.g. Amazon delivery traffic

Germany n=510

Italy n=510

France n=520

United Kingdom n=513

Spain n=517

Management Summary - Our key messages

Mutual perception of safety / risk

2/3 of drivers of heavy vehicles in Germany rate the risk of an accident with a bicycle (66%) or e-scooter (64%) as high or very high. In Italy, this proportion is 58% (bicycle) and 59% (e-scooter), in France 50% and 53%, in the UK 52% and 54% and in Spain 58% and 66%.

In contrast, over half (51%) of general road users in Germany rate the risk of an accident involving a heavy vehicle as low to very low. In the other countries, this proportion is somewhat lower overall, but still lies between a third and half of respondents (Italy 34%, France 44%, UK 42% and Spain 48%).

Biggest risks in road traffic

Drivers of heavy vehicles in Germany cite blind spots and "cyclists who don't ride properly and constantly insist on their rights" as the biggest risks in road traffic. In the other countries surveyed, the risks cited included "using a cell phone while driving and excessive speed" (Italy and France), "general distraction" (UK) and "e-scooters that don't know the traffic rules" (Spain).

Management Summary - Our key messages

Conflicts in road traffic

A fifth (21%) of drivers of heavy vehicles in Germany experience a dangerous situation with cyclists or pedestrians on urban roads every day and over half (53%) experience such a situation at least once a week. These rates are very similar in the other countries surveyed, with Italy at 18% (daily) and 45% (at least once a week), France at 19% and 43%, the UK at 16% and 42% and Spain at 22% and 48%.

Use of driver assistance systems

One in two (50%) drivers of heavy vehicles in Germany state that they frequently or at least sometimes switch off assistance systems. This proportion is very similar in the other countries surveyed, with 47% in Italy, 54% in France, also 54% in the UK and 48% in Spain.

Reasons given include that the systems are perceived as "impractical" or "disruptive" or even "unnecessary", or that "some of the systems do not work properly".

Management Summary - General road users

Perception of traffic climate and subjective feeling of safety

- The perception of the subjective feeling of safety in (urban) road traffic varies from country to country: while over half of general road users in Germany, the UK and Spain feel safe or very safe on the roads, this proportion is only around 1/3 in Italy and France.
- The feeling of safety in the presence of heavy vehicles shows a similar picture. In Germany, the UK and Spain, no significant insecurities can be identified and general road users tend to feel safe. In Italy and France, however, vans and trucks in particular pose a subjective threat on the road.

Accident experience

- The experience of conflicts in road traffic differs significantly in some countries. While only 18% of general road users in the UK experience a conflict with other road users at least once a week, in Germany and France this figure is already around 1/3 of respondents (35% and 30% respectively) and in Italy and Spain around half of respondents (55% and 46% respectively).
- In a country comparison, aggressive driving and disregarding traffic rules are the most common types of misconduct in road traffic.

Management Summary - Drivers of heavy vehicles



Assessment of accident risk with other road users

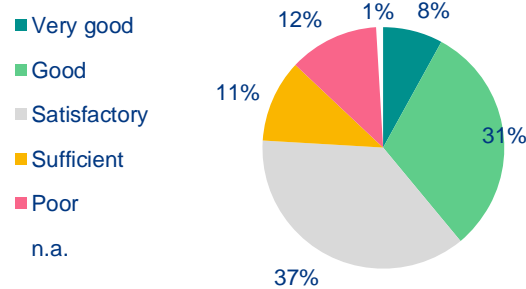
- The risk of being involved in an accident with a bicycle, e-bike or e-scooter is estimated to be the highest in almost all countries. Motorcycles and scooters are also mentioned here.
- While van drivers in Germany and Italy rate the risk higher than truck drivers, this ratio is reversed in France and Italy. In Spain, the values for vans and trucks are almost identical.

Germany

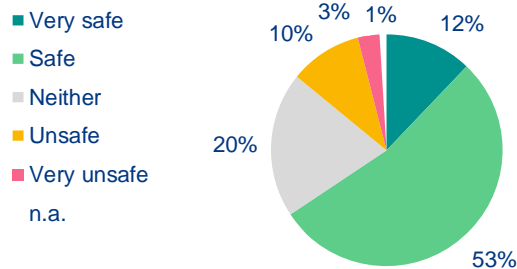
General road users

Subjective feeling of safety in road traffic

Perception of general traffic climate



Overall sense of security



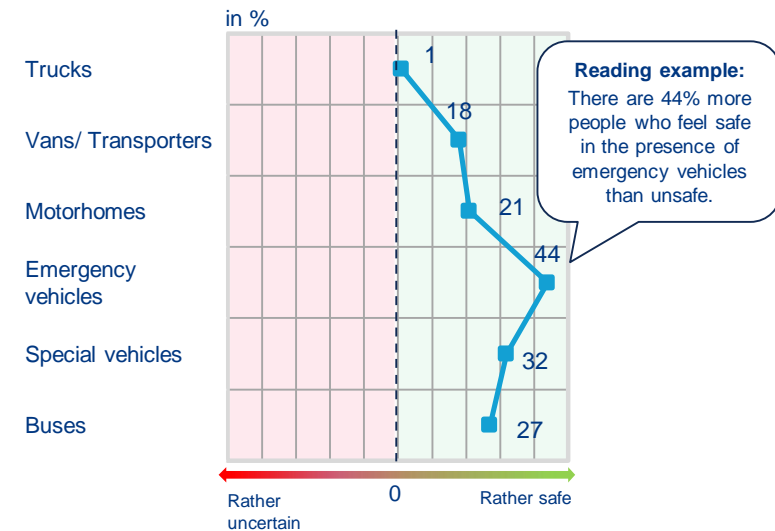
Top 5: biggest risks in road traffic

- Carelessness and distraction (especially smartphones)
- Cyclists, pedestrians, scooter riders and trucks
- Recklessness (including speeding, aggressive driving)
- Traffic jams and roadworks
- Alcohol and drugs at the wheel

Top 5: Situations with particularly high sense of danger

- Narrow roads, bottlenecks and roadworks
- Freeways and highways
- Turning (blind spot, obstructed view) and intersections
- As a cyclist or pedestrian
- Buses, trucks and heavy goods vehicles

Feeling safe in the presence of heavy vehicles



"As a cyclist, I feel endangered by trucks."

"Overtaking on the highway."

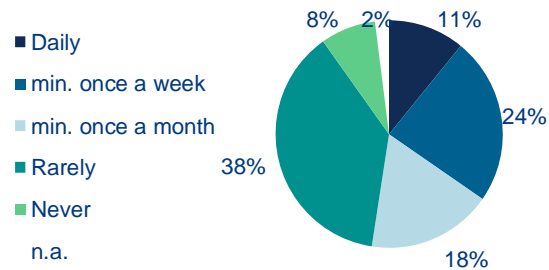
"Unexpected roadworks and resulting changes to the road layout."

"When it gets very tight."

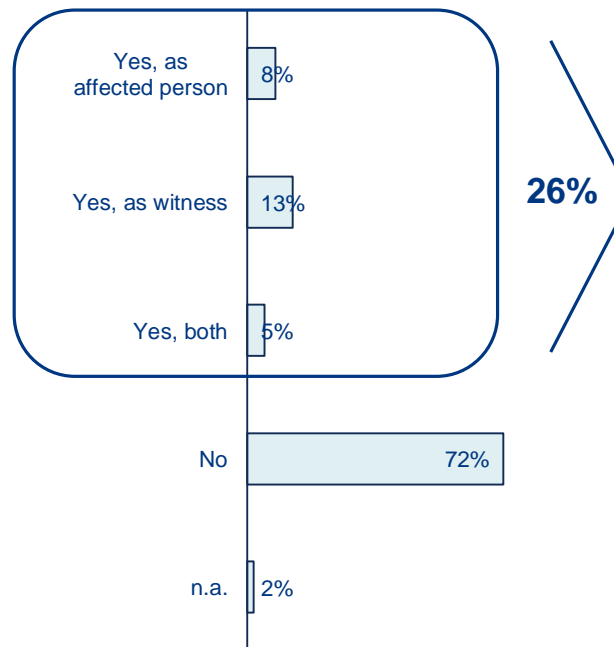
Basis: Main sample (n=1,226); question: "How would you describe the general traffic climate in urban areas?", "How safe do you feel as a road user in an urban environment?", "What is the greatest risk for you in road traffic?", "How safe do you feel in the presence of heavy vehicles on the road (e.g. vans, vans, trucks)?", "Are there specific areas or situations on the road where you feel particularly at risk from heavy vehicles (e.g. trucks, vans/transporters, buses, etc.)?"

Experience with accidents

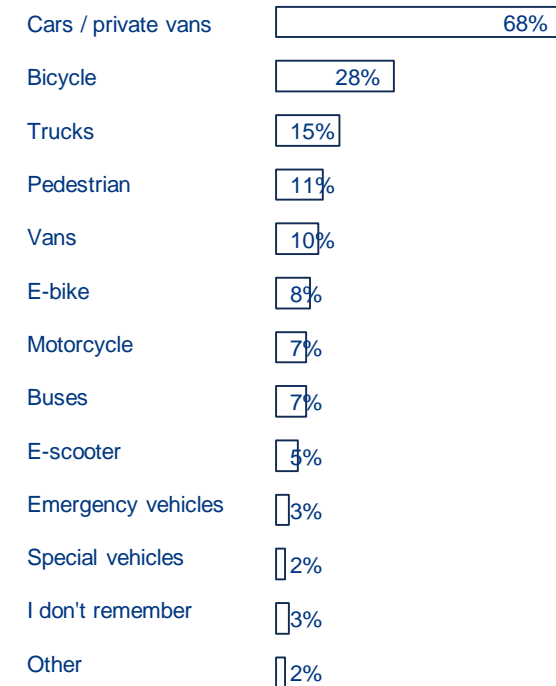
Frequency of experienced conflicts



Traffic accident experienced in the last 3 years

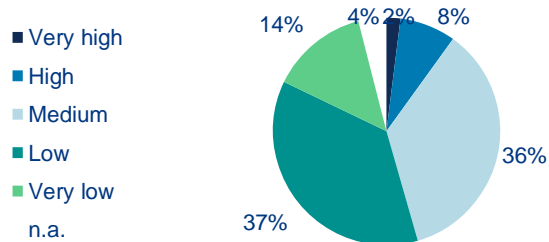


Vehicles involved in traffic accident



Basis: n=318

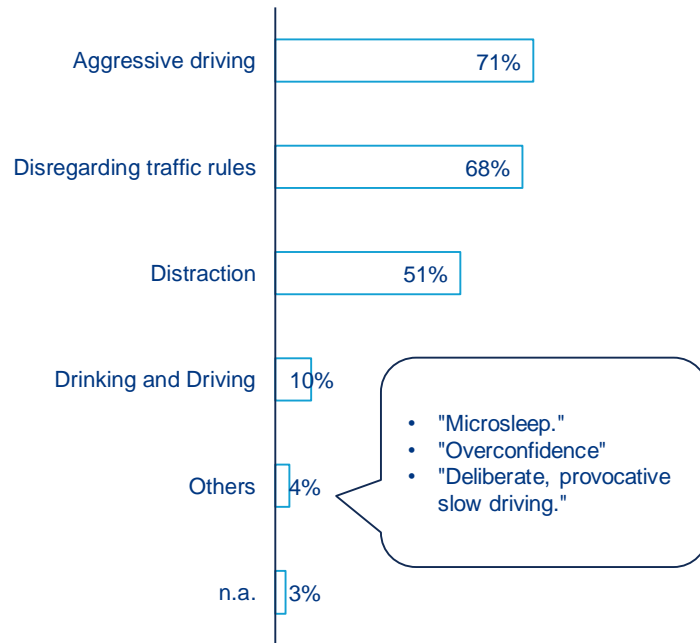
Assessment of accident risk with heavy vehicles



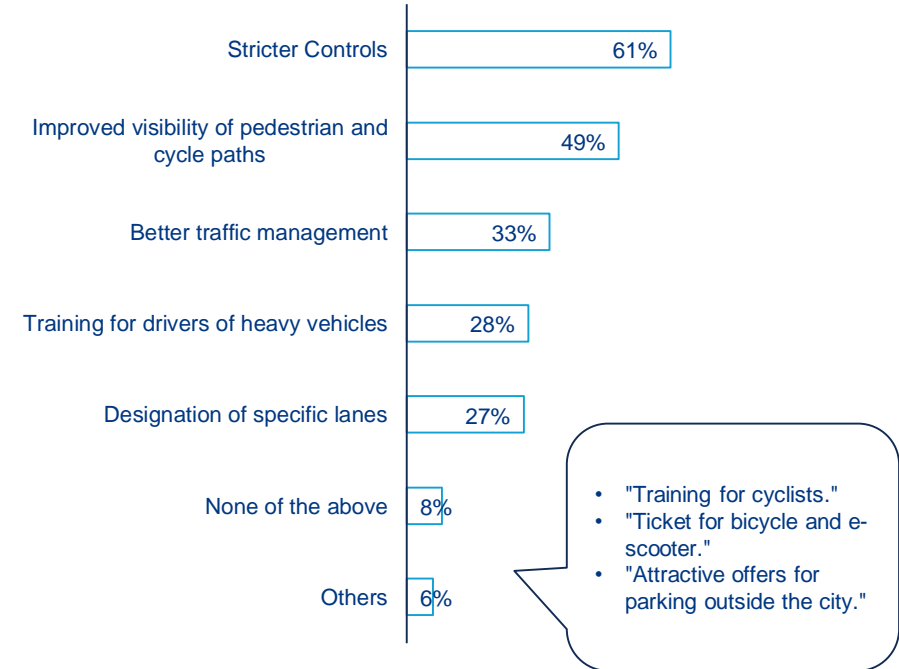
Basis: Main sample (n=1,226); question: "How often do you experience conflicts with other road users (e.g. cars, bicycles, e-bikes, buses, etc.)?", "How high do you estimate the risk of being involved in an accident with a heavy vehicle yourself?", "Have you experienced traffic accidents in the last 3 years as a victim or as a witness?", "You have stated that you have been involved in a traffic accident in the last 3 years, which means of transport were involved?" (multiple answers possible)

Assessment of accident risks

Types of misconduct in road traffic



Measures for greater road safety



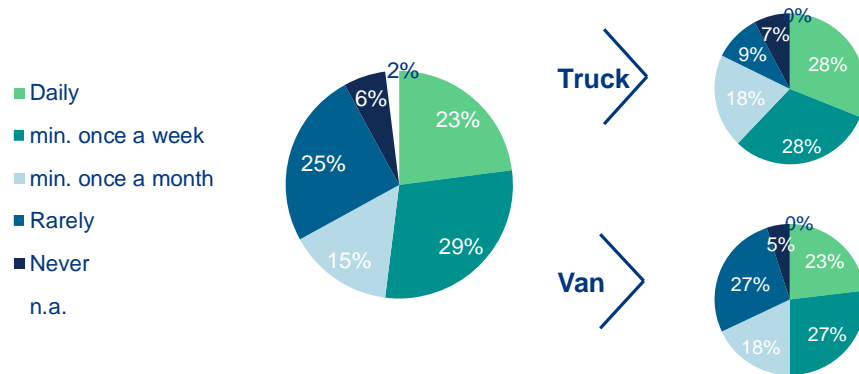
Basis: Main sample (n=1,226); question: "What types of misconduct in road traffic do you perceive most frequently? (multiple answers possible)", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

Germany

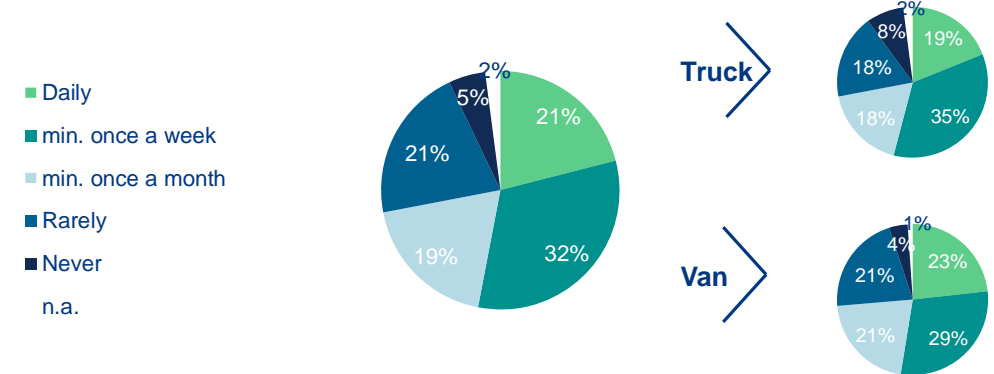
Drivers of heavy vehicles

Conflicts in road traffic

Frequency of experienced conflicts with other road users



Frequency of dangerous situations caused by/involvement of pedestrians or cyclists



Biggest risks in road traffic

Blind spot. Cyclists who do not ride properly and constantly insist on their right and drivers are not attentive.

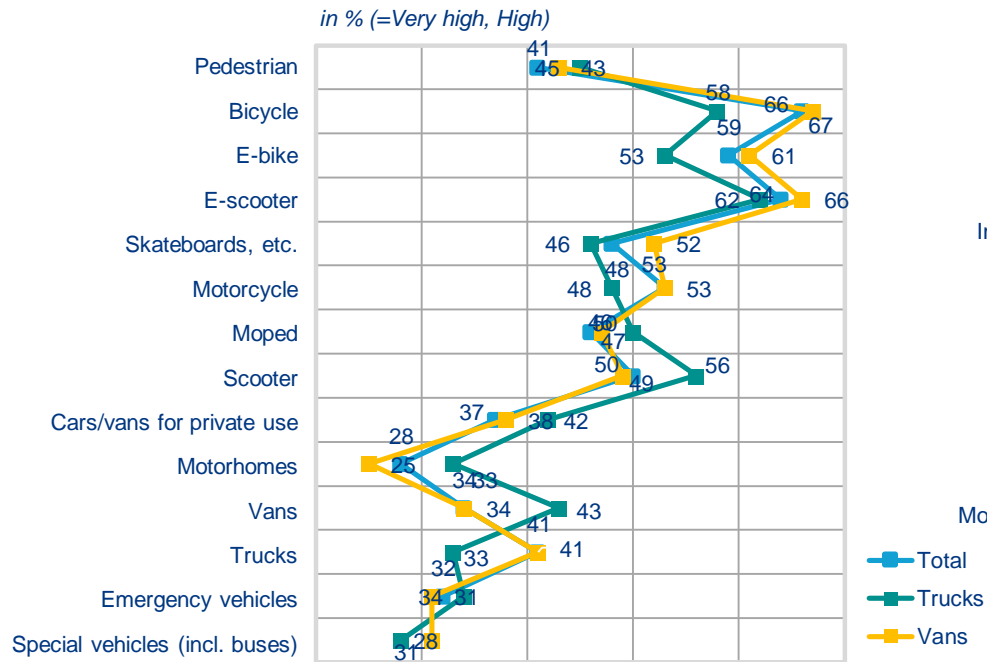
Blind spots for heavy vehicles

When other drivers speed like that and always brake at the last minute. I've often thought I'm about to get rear-ended or side-swiped

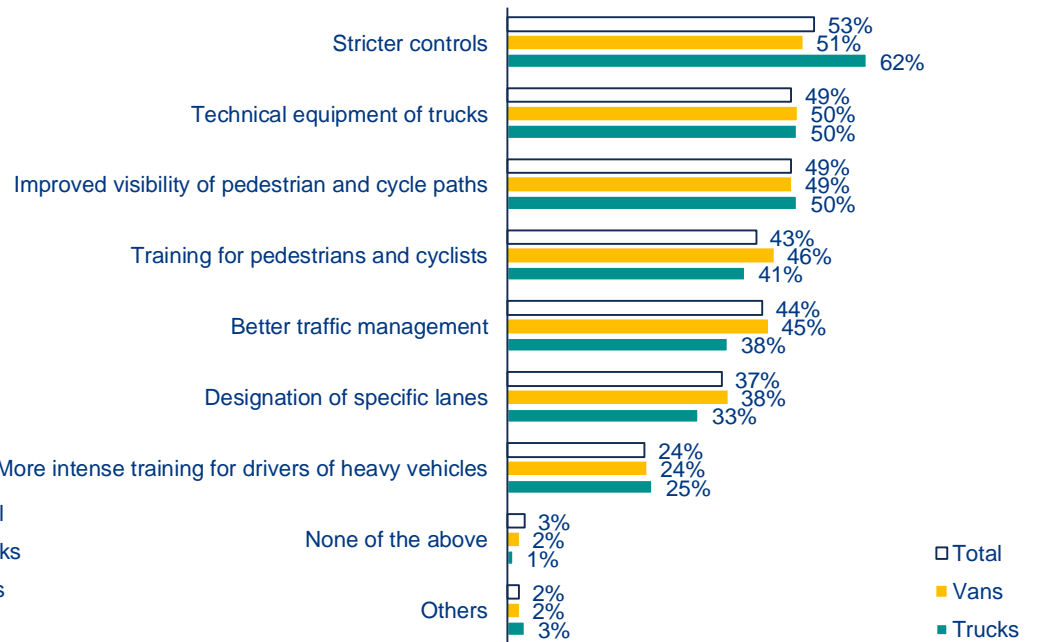
Basis: Boost sample (n=510); Question: "As a driver of heavy vehicles, how often do you experience conflicts with other road users in urban traffic?", "How often do you experience dangerous situations caused by/involving pedestrians or cyclists?", "What is the biggest risk for you in road traffic?"

Assessment of accident risks

Assessment of accident risk with the following road users



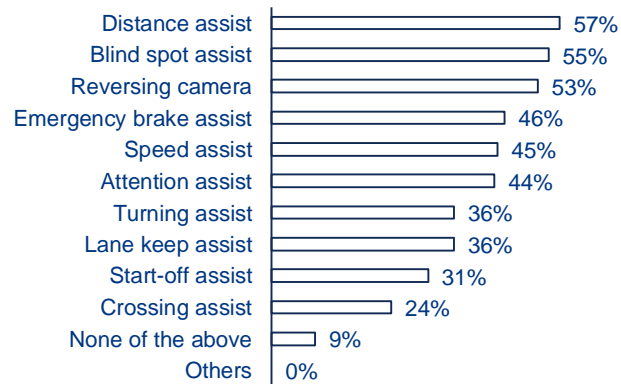
Measures to improve road safety



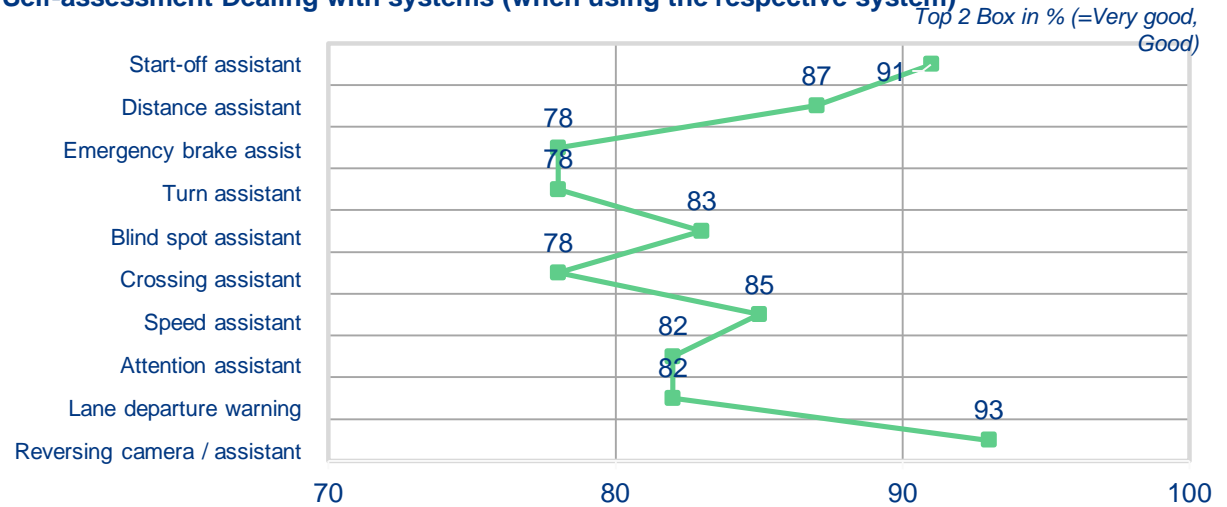
Question: "How high do you estimate your risk of being involved in an accident with the following vehicles, where one of the following vehicles is your opponent?", "What measures do you think would improve safety in urban traffic? (multiple answers possible)"

Dealing with assistance systems

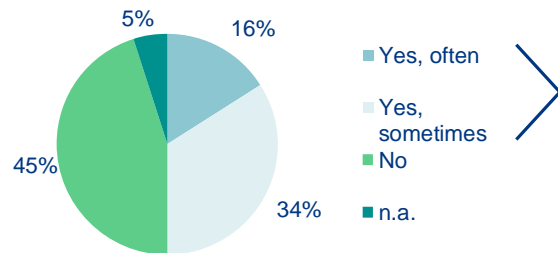
Ranking of the (subj.) most helpful systems



Self-assessment Dealing with systems (when using the respective system)



Deactivation of the systems



Reasons for deactivation

Is sometimes impractical and stops

Sometimes these systems bother me

Blind Spot Assist, because I don't always need it

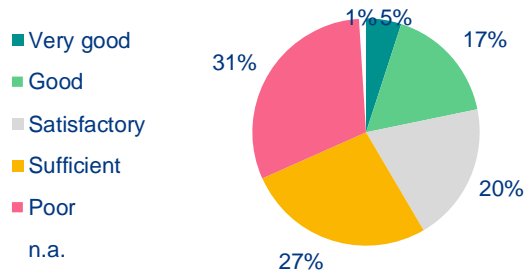
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Italy

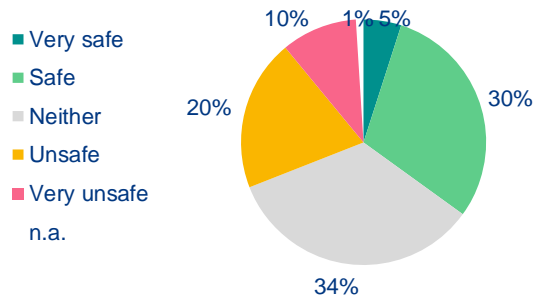
General road users

Subjective feeling of safety in road traffic

Perception of general traffic climate



Overall sense of security



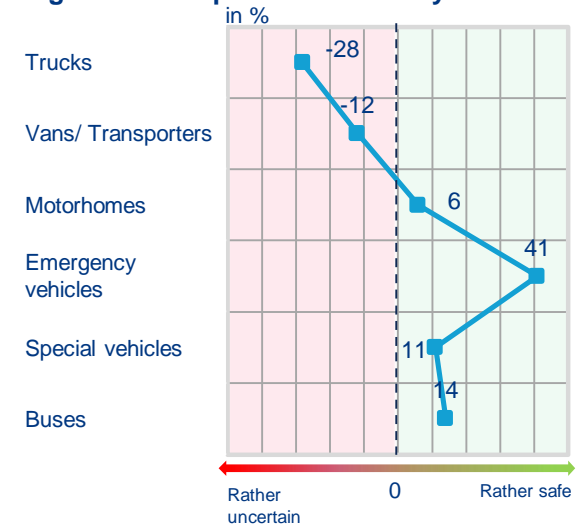
Top 5: biggest risks in road traffic

1. Accidents and collisions
2. Carelessness and distraction
3. Recklessness (including speeding, aggressive driving)
4. Cyclists and pedestrians
5. Lack of signage and disregard for traffic rules

Top 5: Situations with particularly high sense of danger

1. Freeway and expressways
2. Narrow streets
3. Intersections and traffic circles
4. No specific situation
5. Buses, trucks and heavy goods vehicles

Feeling safe in the presence of heavy vehicles



"In narrow streets, that causes a bit of confusion."

"On the highway with trucks."

"I don't feel at risk."

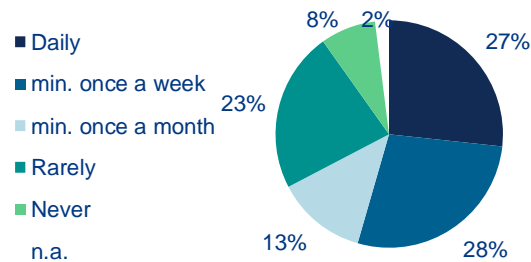
"At intersections or on busy roads."

Basis: Main sample (n=1,027); question: "How would you describe the general traffic climate in urban areas?", "How safe do you feel as a road user in an urban environment?", "What is the greatest risk for you in road traffic?", "How safe do you feel in the presence of heavy vehicles on the road (e.g. vans, vans, trucks)?", "Are there specific areas or situations on the road where you feel particularly at risk from heavy vehicles (e.g. trucks, vans/transporters, buses, etc.)?"

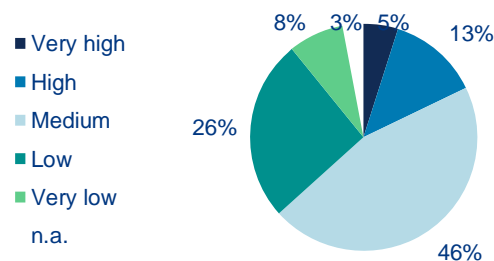
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Experience with accidents

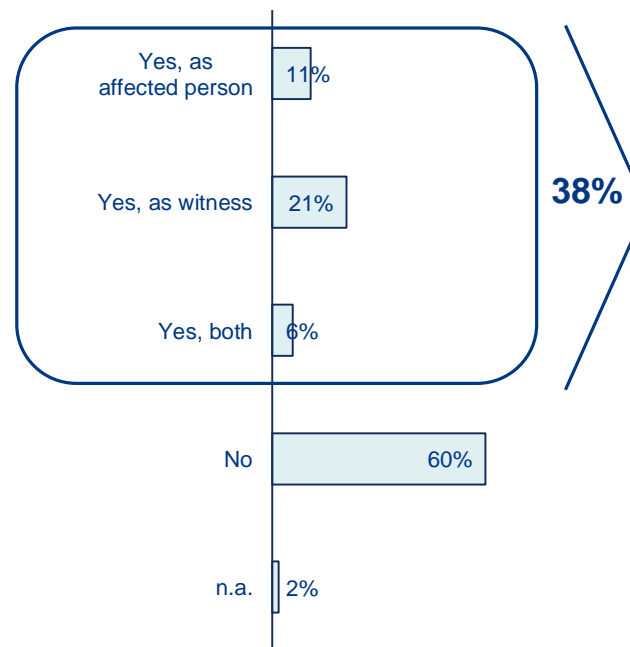
Frequency of experienced conflicts



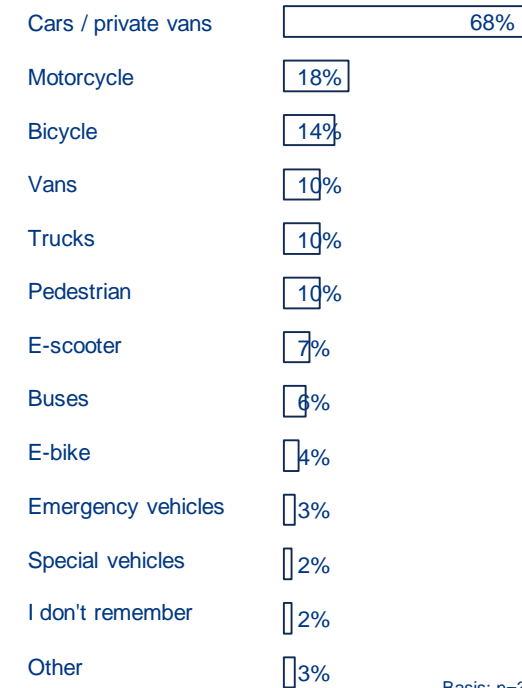
Assessment of accident risk with heavy vehicle



Traffic accident experienced in the last 3 years



Vehicles involved in traffic accident

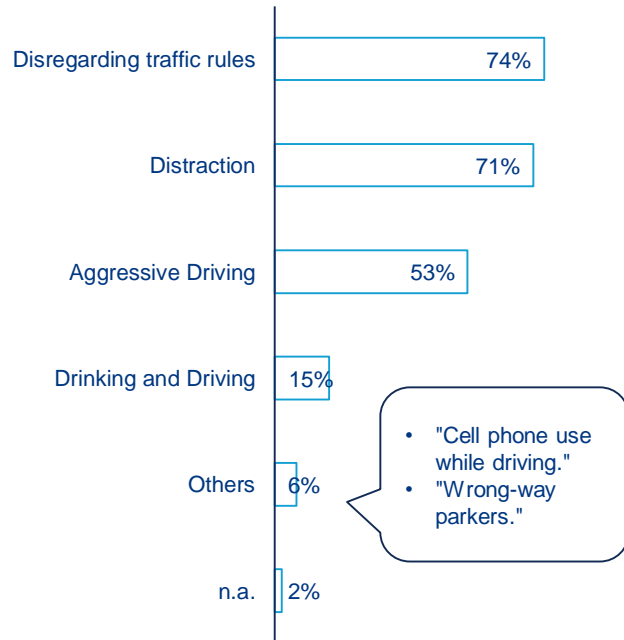


Basis: n=390

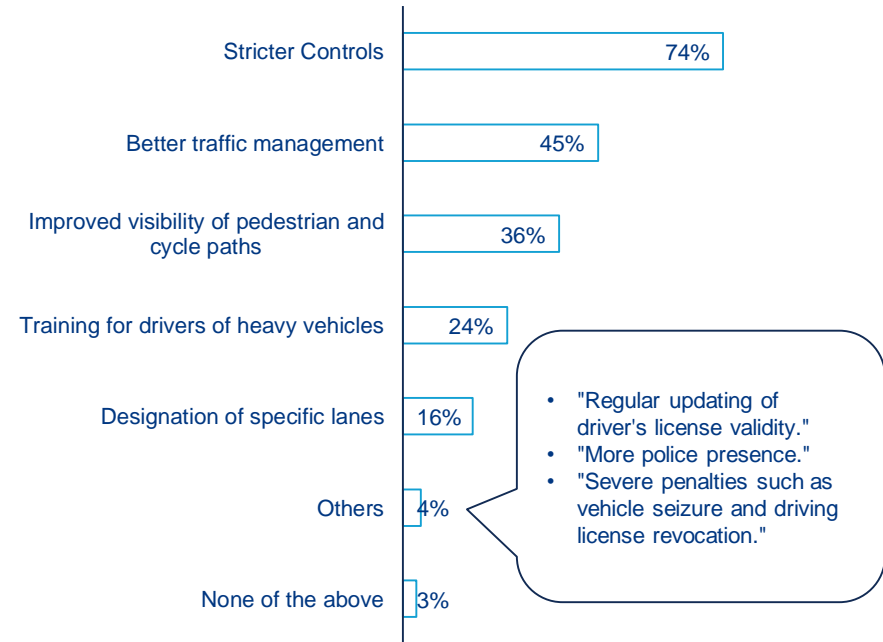
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Assessment of accident risks

Types of misconduct in road traffic



Measures for greater road safety



Basis: Main sample (n=1,027); question: "What types of misconduct in road traffic do you perceive most frequently? (multiple answers possible)", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

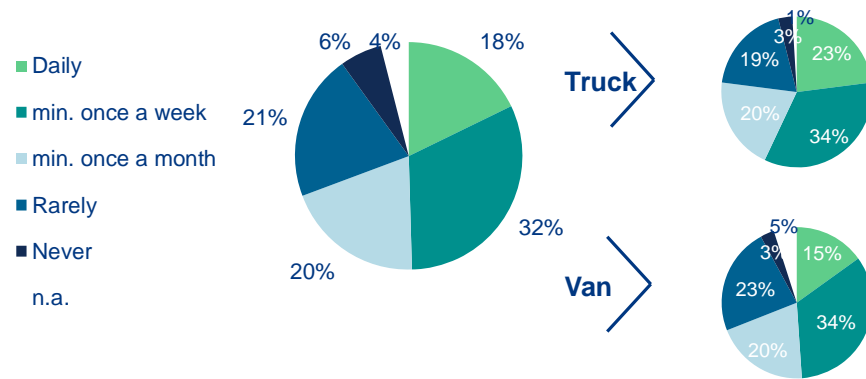
Italy

Drivers of heavy vehicles

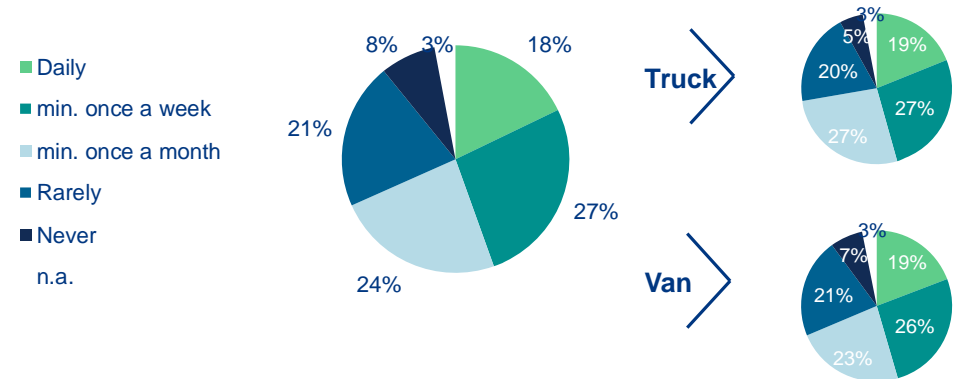
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Conflicts in road traffic

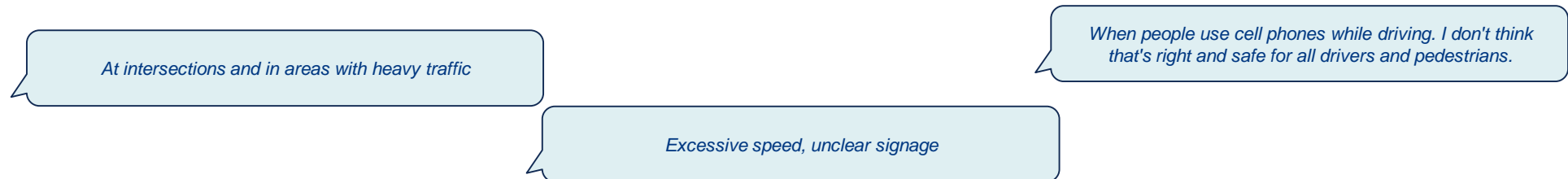
Frequency of experienced conflicts with other road users



Frequency of dangerous situations caused by/involvement of pedestrians or cyclists



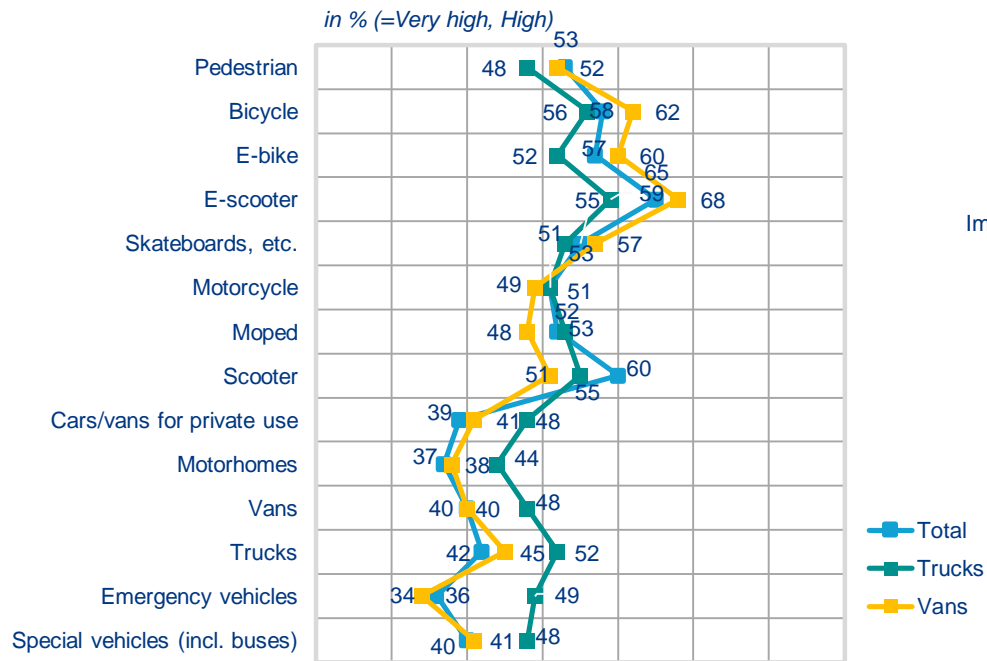
Biggest risks in road traffic



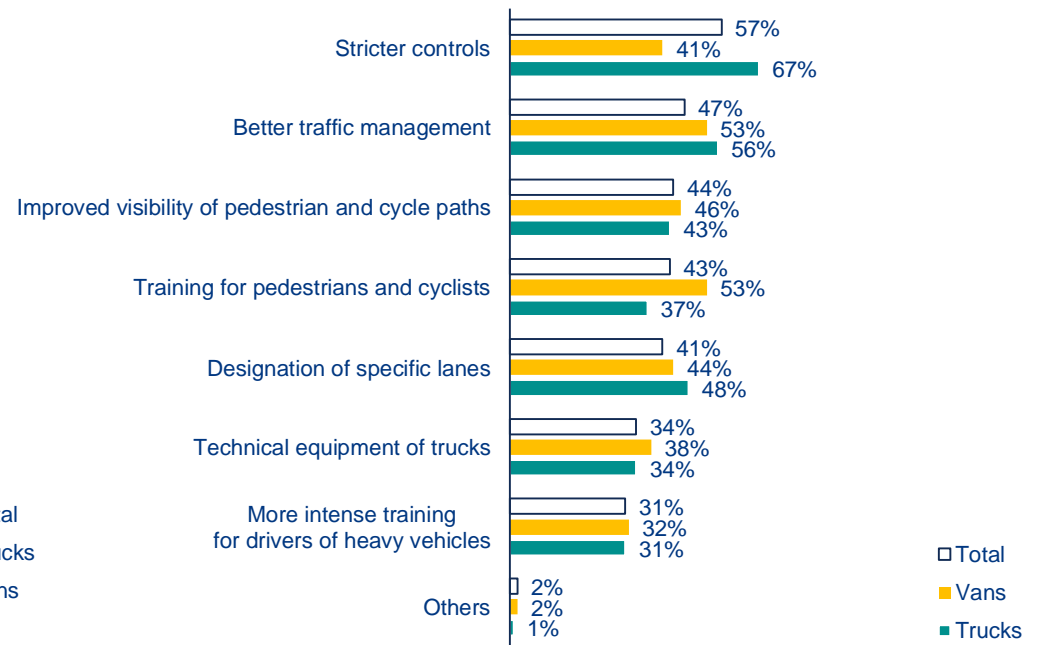
Basis: Boost sample (n=510); Question: "As a driver of heavy vehicles, how often do you experience conflicts with other road users in urban traffic?", "How often do you experience dangerous situations caused by/involving pedestrians or cyclists?", "What is the biggest risk for you in road traffic?"

Assessment of accident risks

Assessment of accident risk with the following road users



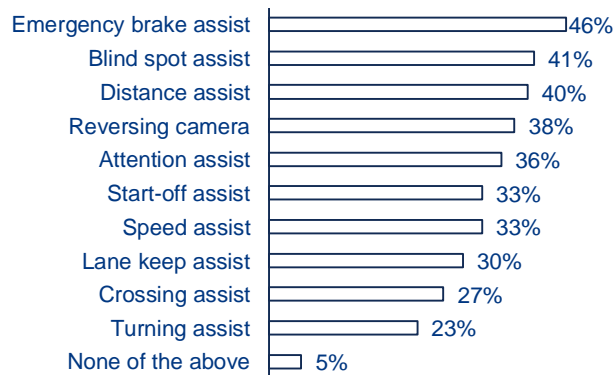
Measures to improve road safety



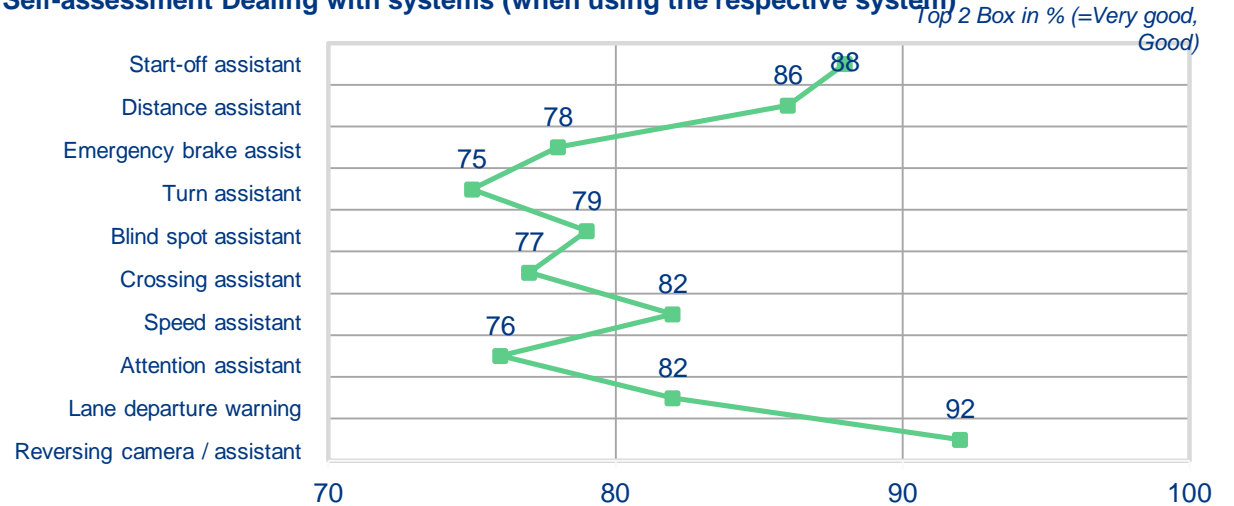
Basis: Boost Sample (n=510); Question: "How high do you estimate your risk of being involved in an accident with the following vehicles, where one of the following vehicles is your opponent?", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

Dealing with assistance systems

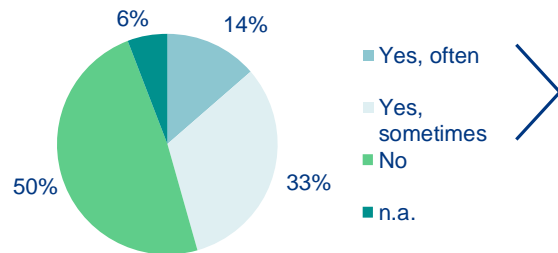
Ranking of the (subj.) most helpful systems



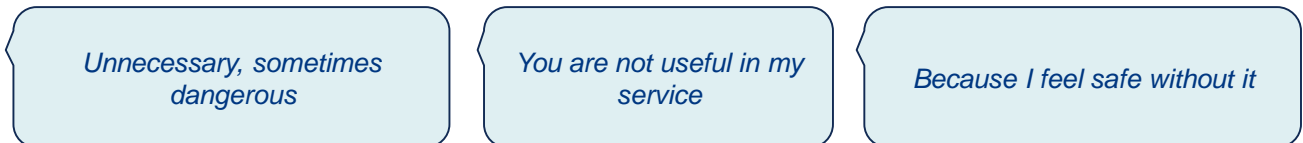
Self-assessment Dealing with systems (when using the respective system)



Deactivation of the systems



Reasons for deactivation



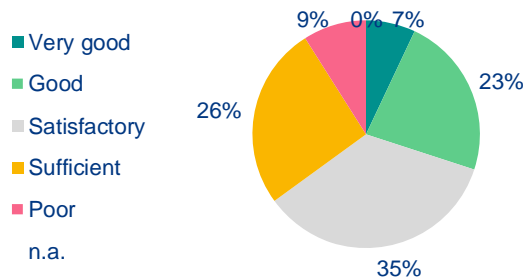
Basis: Boost sample (n=510); question: " Which assistance systems do you consider helpful and would you support a comprehensive introduction of these systems?" "How familiar are you with the systems?" "Do you deactivate assistance systems?" "What are reasons for deactivation?"

France

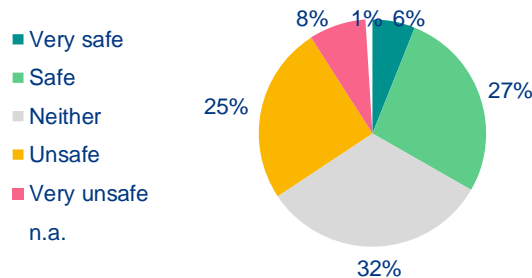
General road users

Subjective feeling of safety in road traffic

Perception of general traffic climate



Overall sense of security



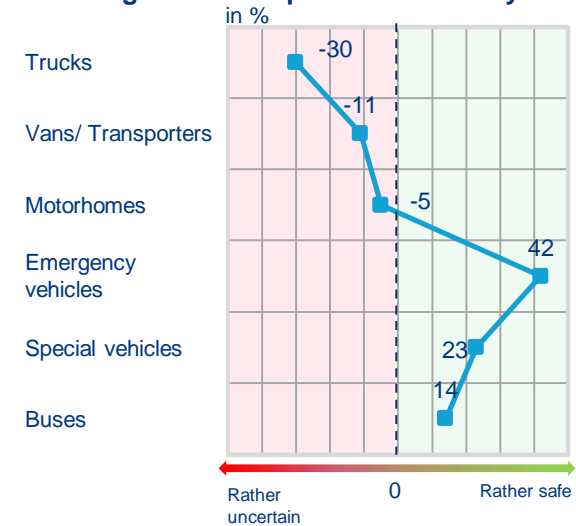
Top 5 biggest risks in road traffic

1. Accidents and misconduct by other road users
2. Recklessness (including speeding, aggressive driving)
3. Alcohol and drugs at the wheel
4. Carelessness and distraction
5. Pedestrians and cyclists

Top 5 situations with particularly high sense of danger

1. Highways and country roads
2. Narrow streets and urban areas
3. Buses, trucks and heavy goods vehicles
4. Intersections, traffic circles and crosswalks
5. Roadworks and obstacles on the road

Feeling safe in the presence of heavy vehicles



Vehicles that do not maintain the safety distance.

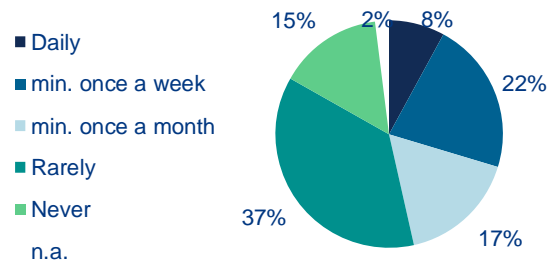
Parking offenders.

On highways, when trucks do not keep a safe distance or violate overtaking bans.

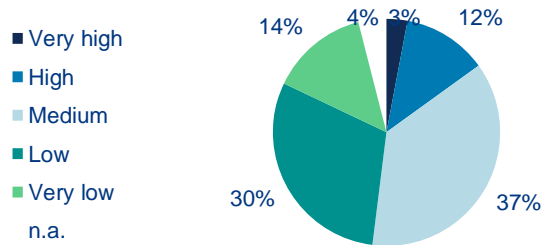
Basis: Main sample (n=1,005); question: "How would you describe the general traffic climate in urban areas?", "How safe do you feel as a road user in an urban environment?", "What is the greatest risk for you in road traffic?", "How safe do you feel in the presence of heavy vehicles on the road (e.g. vans, vans, trucks)?", "Are there specific areas or situations on the road where you feel particularly at risk from heavy vehicles (e.g. trucks, vans/transporters, buses, etc.)?"

Experience with accidents

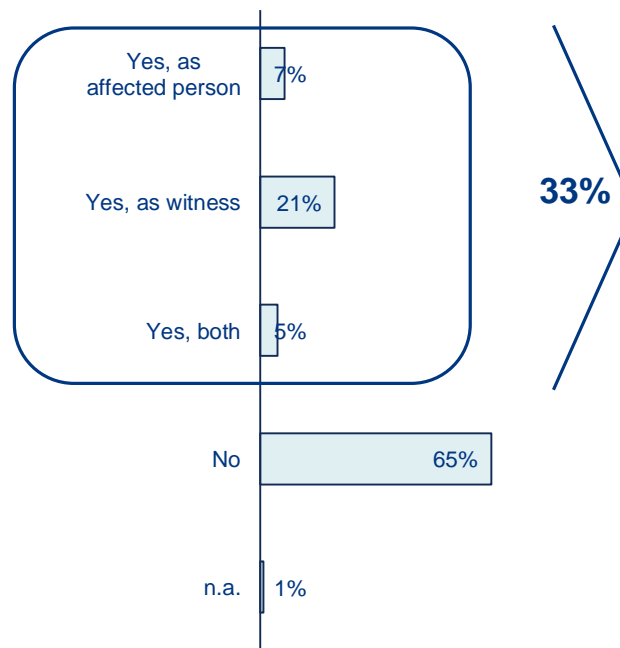
Frequency of experienced conflicts



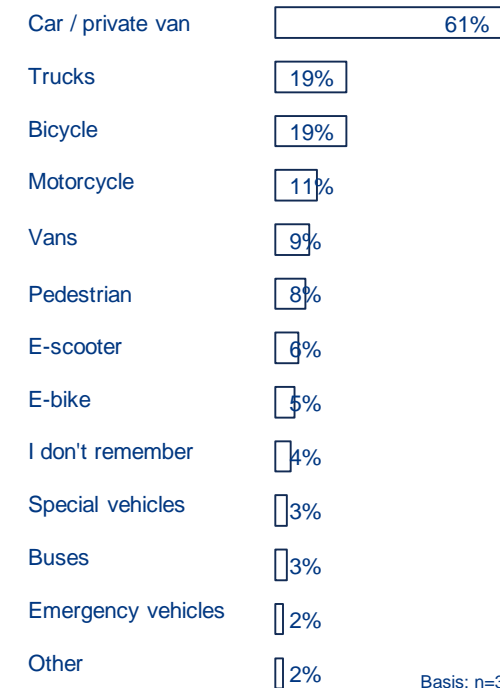
Assessment of accident risk with heavy vehicle



Traffic accident experienced in the last 3 years



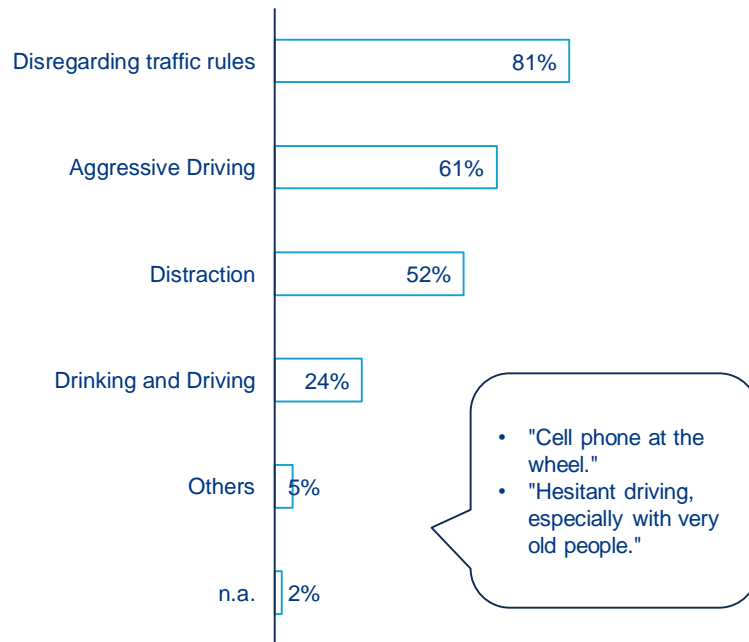
Vehicles involved in traffic accident



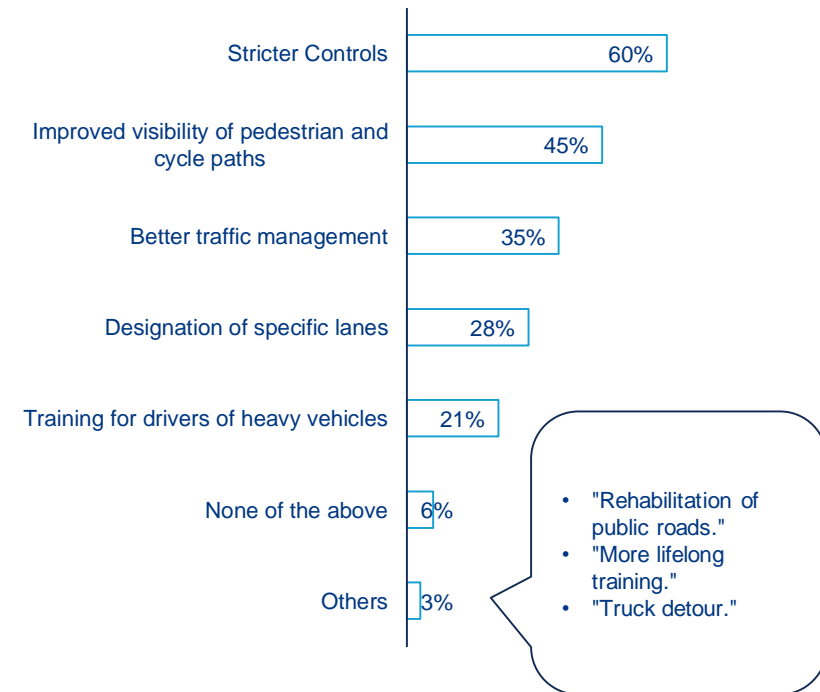
Basis: Main sample (n=1,005); question: "How often do you experience conflicts with other road users (e.g. cars, bicycles, e-bikes, buses, etc.)?", "How high do you estimate the risk of being involved in an accident with a heavy vehicle yourself?", "Have you experienced traffic accidents in the last 3 years as a victim or as a witness?", "You have stated that you have been involved in a traffic accident in the last 3 years, which means of transport were involved?" (multiple answers possible)

Assessment of accident risks

Types of misconduct in road traffic



Measures for greater road safety



Basis: Main sample (n=1,005); question: "What types of misconduct in road traffic do you perceive most frequently? (multiple answers possible)", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

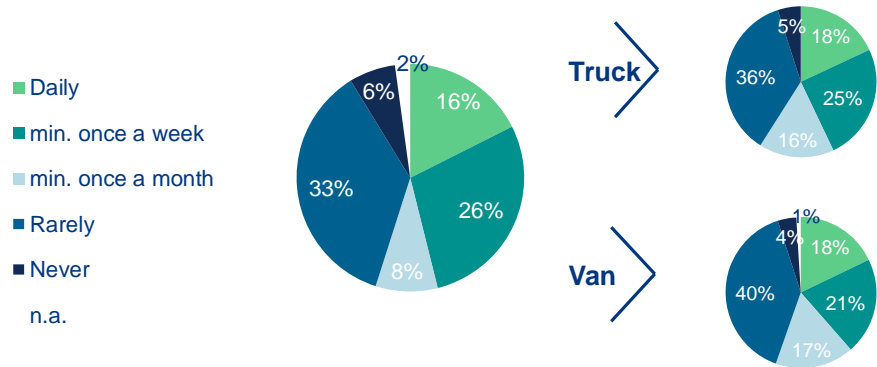
France

Drivers of heavy vehicles

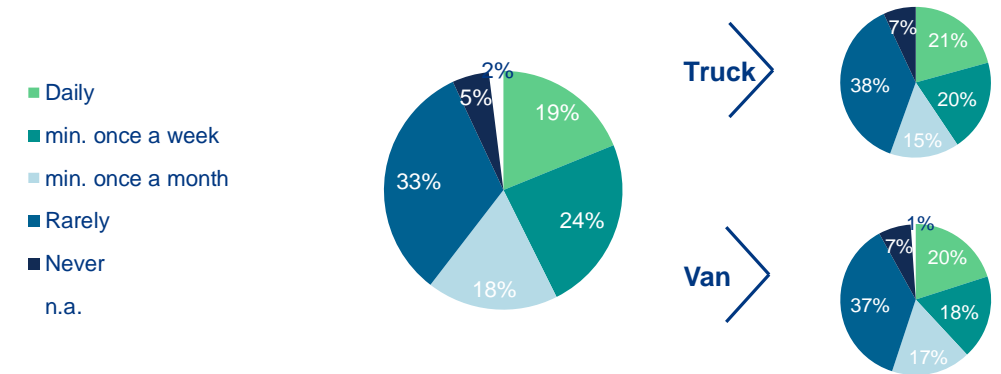
12TH ALLIANZ MOTOR DAY - FRANCE

Conflicts in road traffic

Frequency of experienced conflicts with other road users



Frequency of dangerous situations caused by/involvement of pedestrians or cyclists



Biggest risks in road traffic

Cell phone use, alcohol, drugs or excessive speed

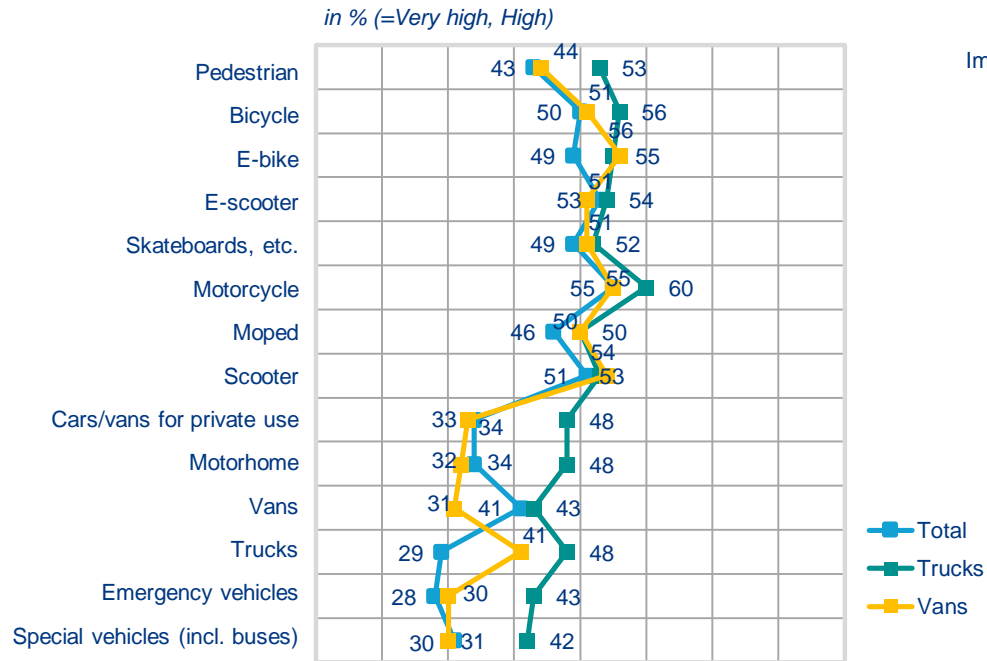
The greatest risk is the road user who does not observe the traffic rules

Drivers who don't use their indicators. Those who change lanes without indicating and don't look in the rearview mirror

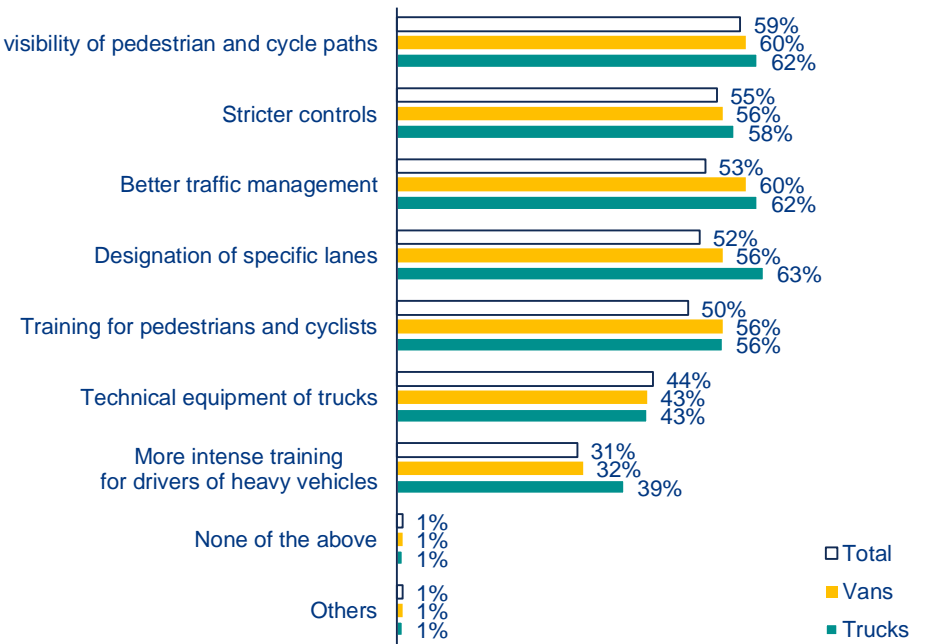
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Assessment of accident risks

Assessment of accident risk with the following road users



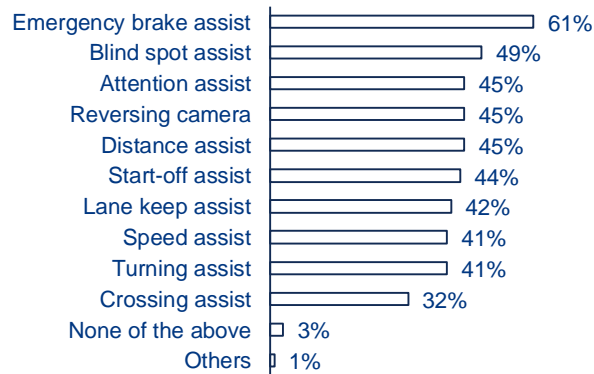
Measures to improve road safety



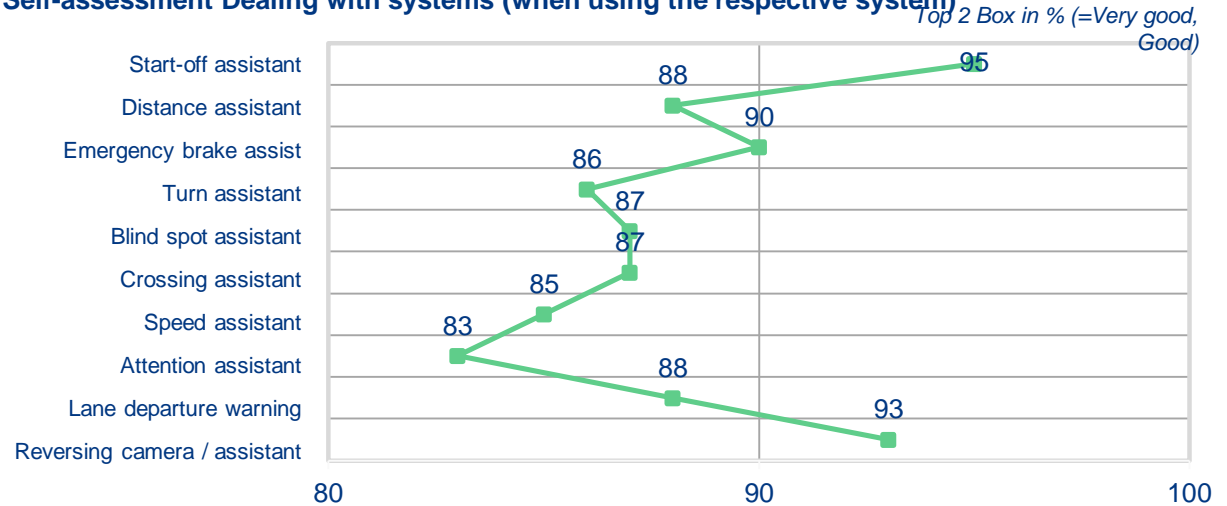
Basis: Boost Sample (n=520); Question: "How high do you estimate your risk of being involved in an accident with the following vehicles, where one of the following vehicles is your opponent?", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

Dealing with assistance systems

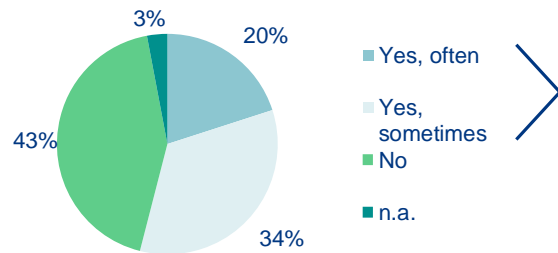
Ranking of the (subj.) most helpful systems



Self-assessment Dealing with systems (when using the respective system)



Deactivation of the systems



Reasons for deactivation

I deactivate start-stop because it doesn't work properly

Starting aid too complex and dangerous

to concentrate better

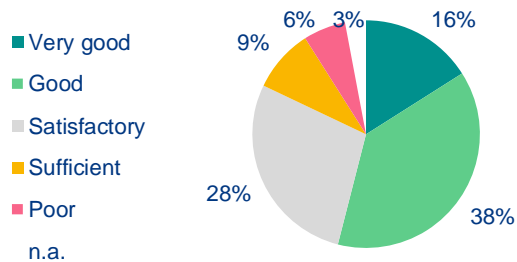
Basis: Boost sample (n=510); question: " Which assistance systems do you consider helpful and would you support a comprehensive introduction of these systems?" "How familiar are you with the systems?" "Do you deactivate assistance systems?" "What are reasons for deactivation?"

United Kingdom

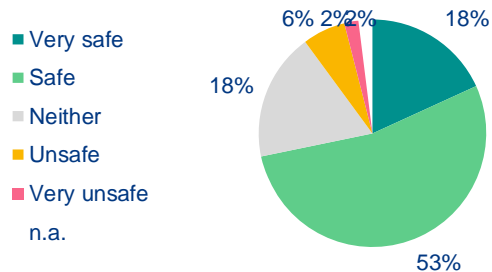
General road users

Subjective feeling of safety in road traffic

Perception of general traffic climate



Overall sense of security



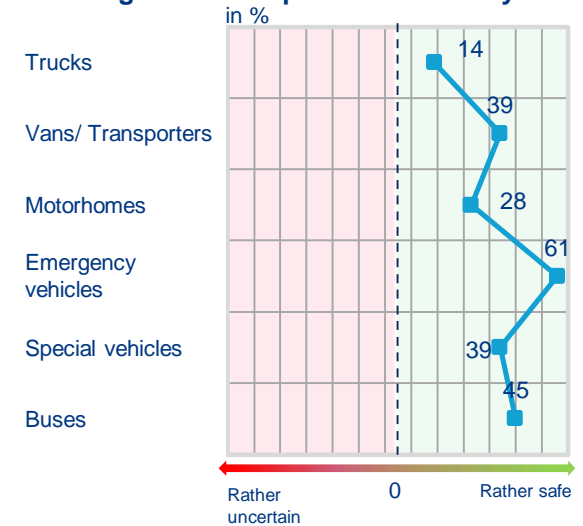
Top 5 biggest risks in road traffic

1. Other road users
2. Road condition (especially potholes)
3. Cyclists and pedestrians
4. Recklessness (including speeding, aggressive driving)
5. Alcohol and drugs at the wheel

Top 5 situations with particularly high sense of danger

1. No specific situation
2. Narrow roads, bottlenecks
3. Freeways and highways
4. Intersections and traffic circles
5. Weather conditions and poor visibility

Feeling safe in the presence of heavy vehicles



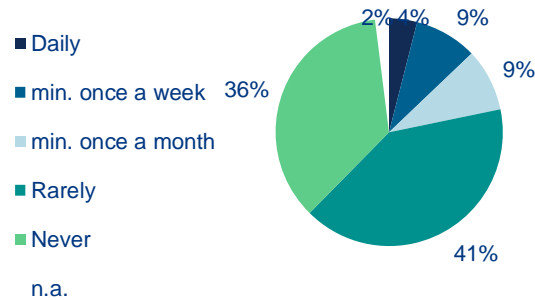
- I don't really feel at risk.
- Driving on highways in heavy rain.
- Highways and expressways in bad weather.
- Narrow streets with parked cars.

Basis: Main sample (n=1,027); question: "How would you describe the general traffic climate in urban areas?", "How safe do you feel as a road user in an urban environment?", "What is the greatest risk for you in road traffic?", "How safe do you feel in the presence of heavy vehicles on the road (e.g. vans, vans, trucks)?", "Are there specific areas or situations on the road where you feel particularly at risk from heavy vehicles (e.g. trucks, vans/transporters, buses, etc.)?"

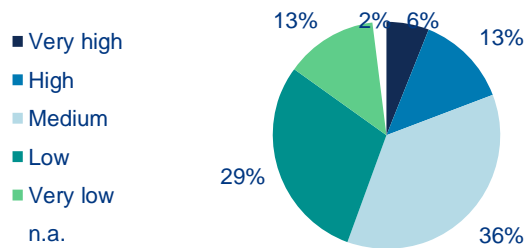
12TH ALLIANZ MOTOR DAY - UNITED KINGDOM

Experience with accidents

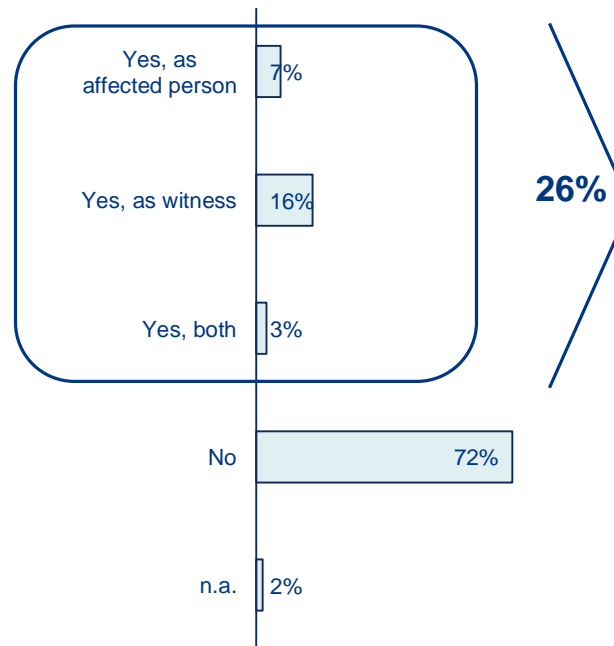
Frequency of experienced conflicts



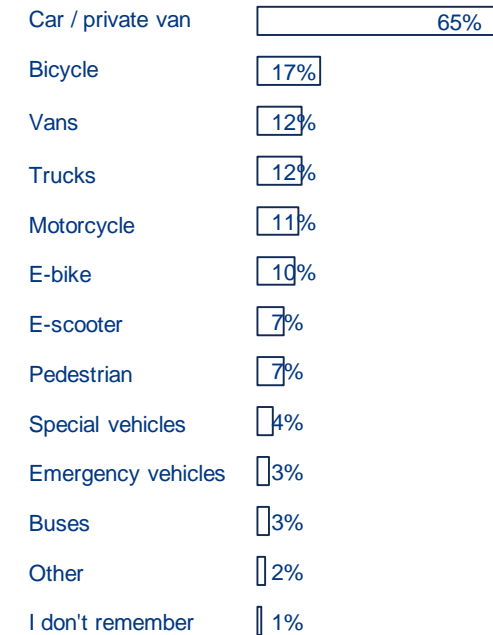
Assessment of accident risk with heavy vehicle



Traffic accident experienced in the last 3 years



Vehicles involved in traffic accident

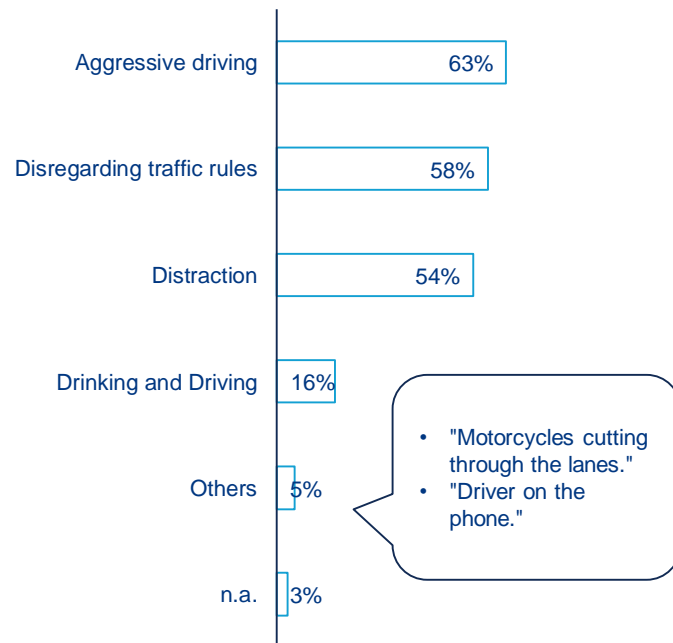


Basis: n=267

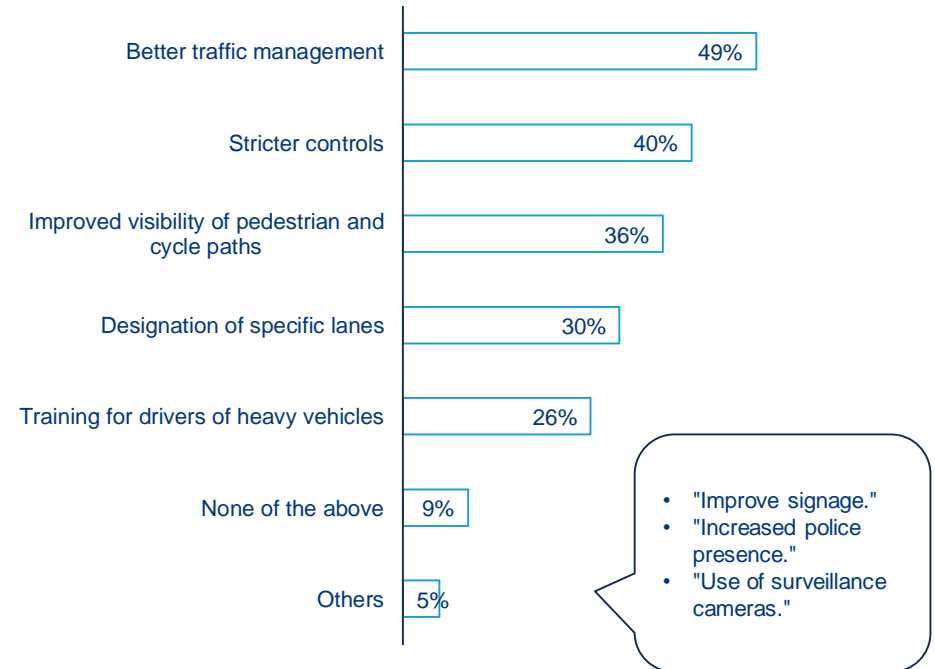
Basis: Main sample (n=1,027); question: "How often do you experience conflicts with other road users (e.g. cars, bicycles, e-bikes, buses, etc.)?", "How high do you estimate the risk of being involved in an accident with a heavy vehicle yourself?", "Have you experienced traffic accidents in the last 3 years as a victim or as a witness?", "You have stated that you have been involved in a traffic accident in the last 3 years, which means of transport were involved?" (multiple answers possible)

Assessment of accident risks

Types of misconduct in road traffic



Measures for greater road safety



Basis: Main sample (n=1,027); question: "What types of misconduct in road traffic do you perceive most frequently? (multiple answers possible)", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

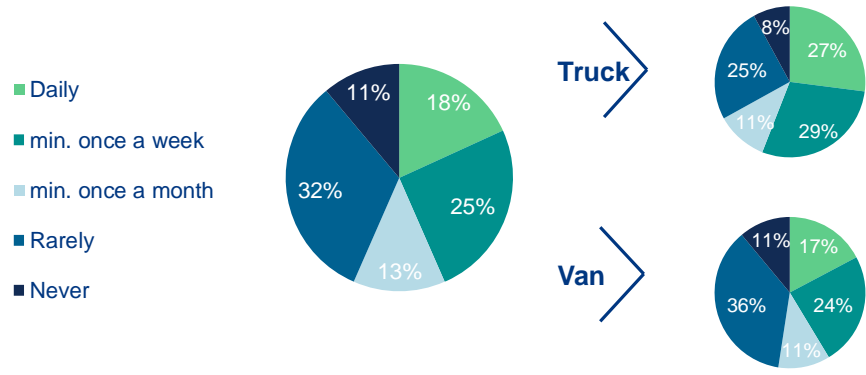
United Kingdom

Drivers of heavy vehicles

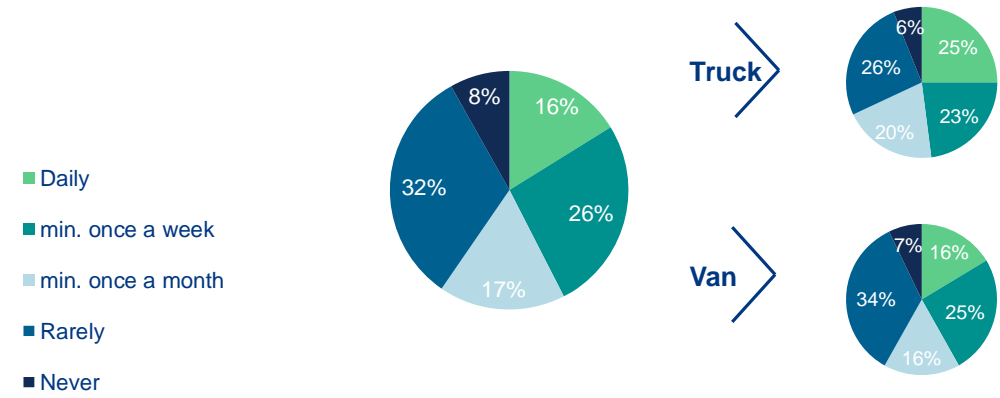
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Conflicts in road traffic

Frequency of experienced conflicts with other road users



Frequency of dangerous situations caused by/involving pedestrians or cyclists



Biggest risks in road traffic

Distracted driving. One of the most common types of car accidents is due to distracted driving

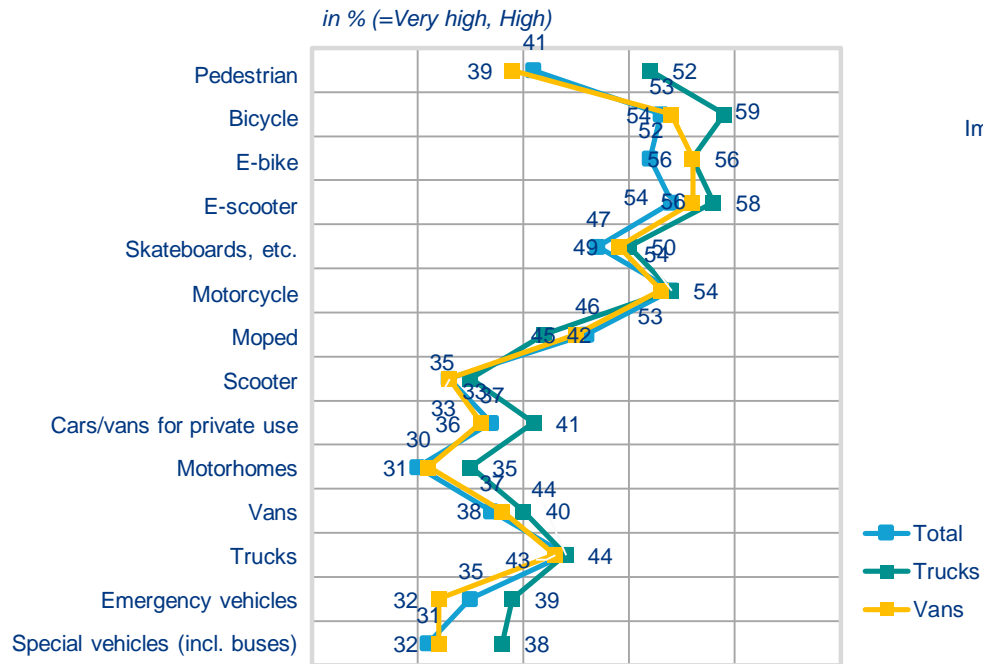
Huge trucks, they are quite scary, I have seen many accidents with these vehicles

Older drivers

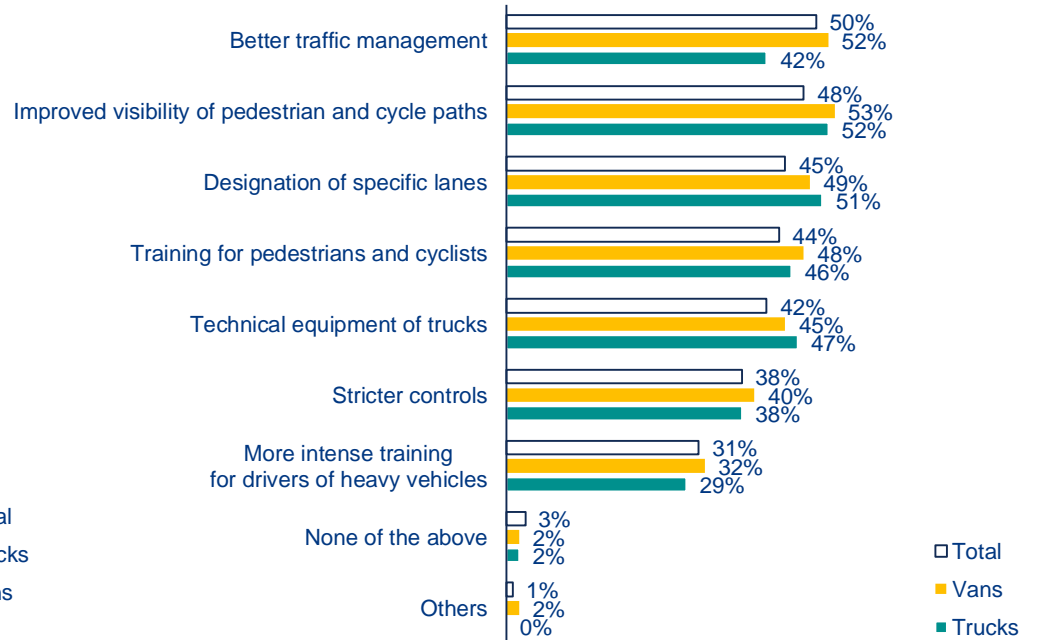
Basis: Boost sample (n=510); Question: "As a driver of heavy vehicles, how often do you experience conflicts with other road users in urban traffic?", "How often do you experience dangerous situations caused by/involving pedestrians or cyclists?", "What is the biggest risk for you in road traffic?"

Assessment of accident risks

Assessment of accident risk with the following road users



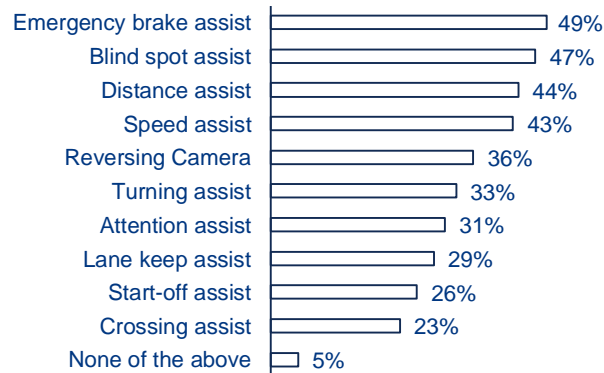
Measures to improve road safety



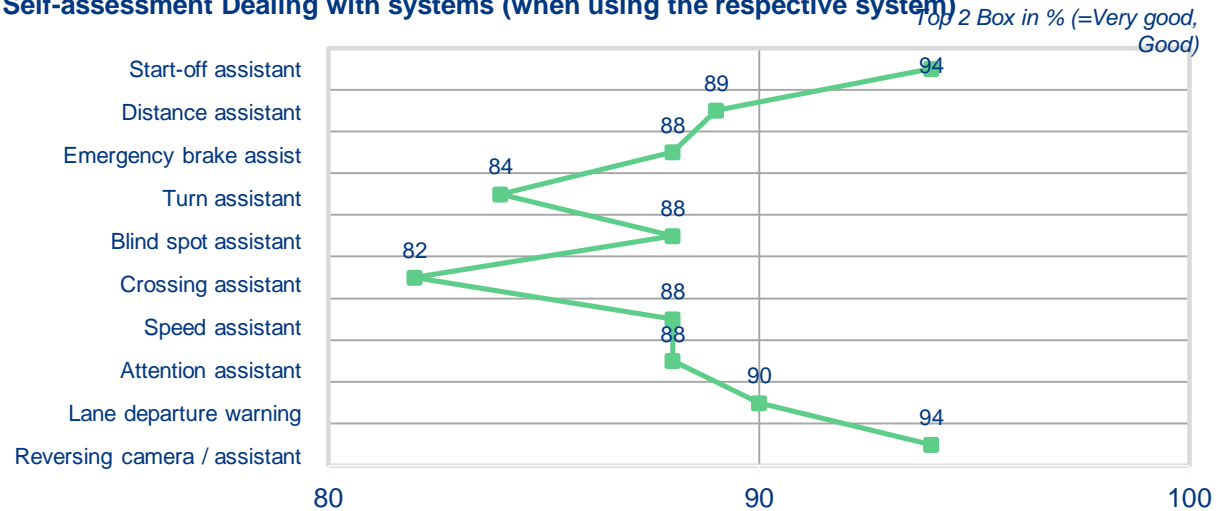
Basis: Boost Sample (n=513); Question: "How high do you estimate your risk of being involved in an accident with the following vehicles, where one of the following vehicles is your opponent?", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

Dealing with assistance systems

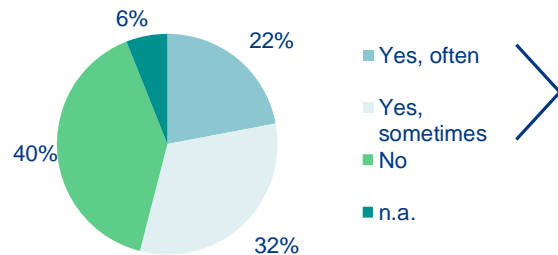
Ranking of the (subj.) most helpful systems



Self-assessment Dealing with systems (when using the respective system)



Deactivation of the systems



Reasons for deactivation

I find that the lane departure warning system can be over-sensitive

Speed assistant not working properly

I have the feeling that I don't need them

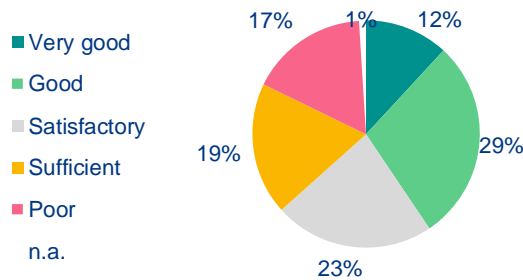
Basis: Boost sample (n=510); question: " Which assistance systems do you consider helpful and would you support a comprehensive introduction of these systems?" "How familiar are you with the systems?" "Do you deactivate assistance systems?" "What are reasons for deactivation?"

Spain

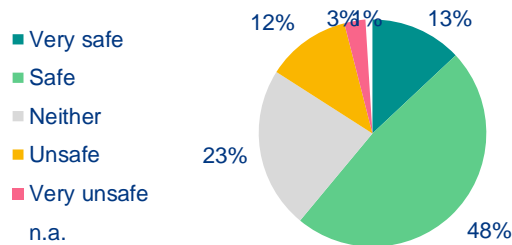
General road users

Subjective feeling of safety in road traffic

Perception of general traffic climate



Overall sense of security



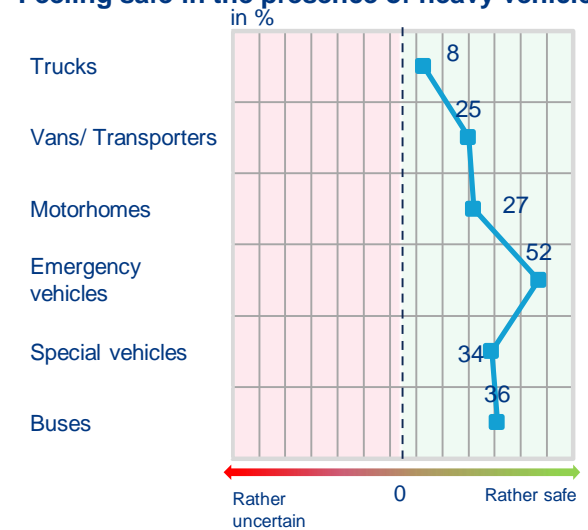
Top 5 biggest risks in road traffic

1. Accidents and misconduct by other road users
2. Scooter and cyclist
3. Disregard for traffic rules and distraction
4. Recklessness (including speeding, aggressive driving)
5. Infrastructure problems and environmental pollution

Top 5 situations with particularly high sense of danger

1. Freeways and highways
2. Intersections and traffic circles
3. Overtaking and high speed
4. Narrow roads and bottlenecks
5. Buses, trucks and heavy goods vehicles

Feeling safe in the presence of heavy vehicles



Especially on mountain roads.

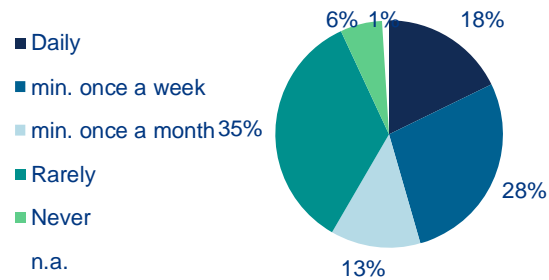
The Ap7 (Autopista 7) in particular is terrible.

It is dangerous for me and for others on very steeply sloping roads.

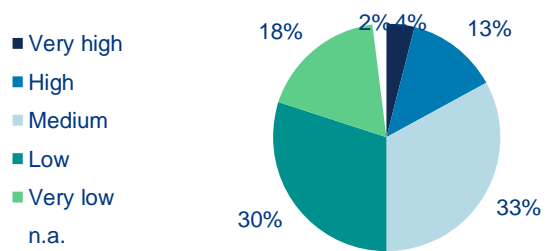
Basis: Main sample (n=1,030); question: "How would you describe the general traffic climate in urban areas?", "How safe do you feel as a road user in an urban environment?", "What is the greatest risk for you in road traffic?", "How safe do you feel in the presence of heavy vehicles on the road (e.g. vans, vans, trucks)?", "Are there specific areas or situations on the road where you feel particularly at risk from heavy vehicles (e.g. trucks, vans/transporters, buses, etc.)?"

Accident experience

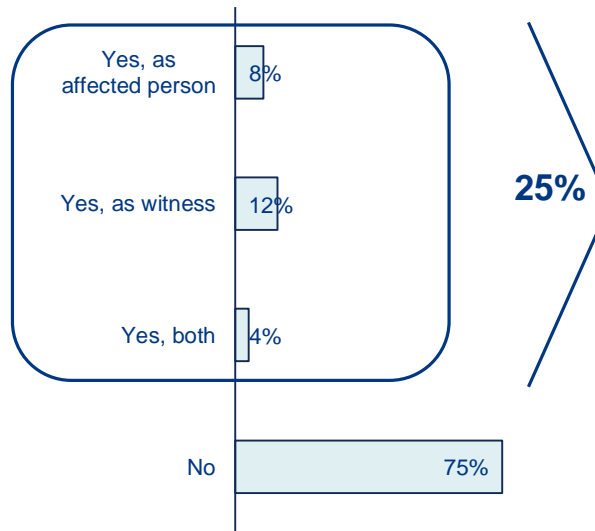
Frequency of experienced conflicts



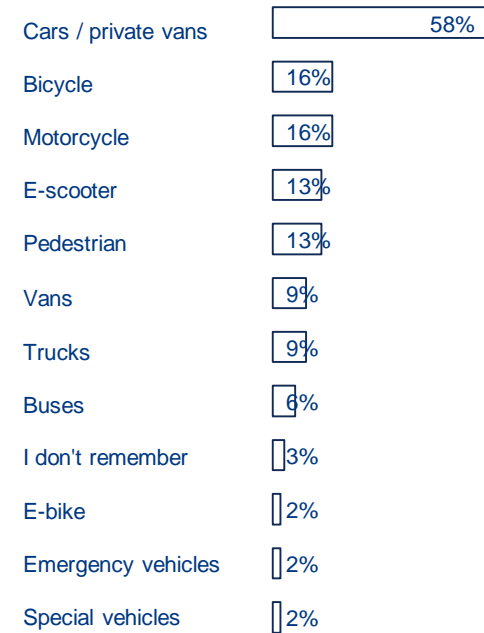
Assessment of accident risk with heavy vehicle



Traffic accident experienced in the last 3 years



Vehicles involved in traffic accident

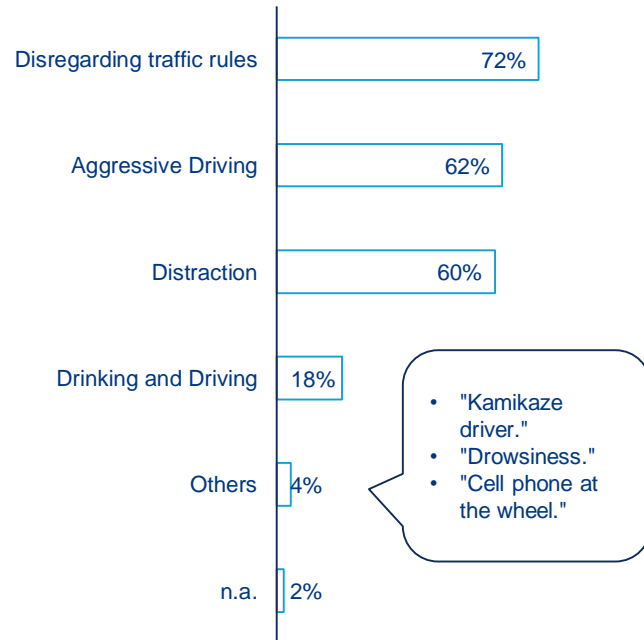


Basis: n=257

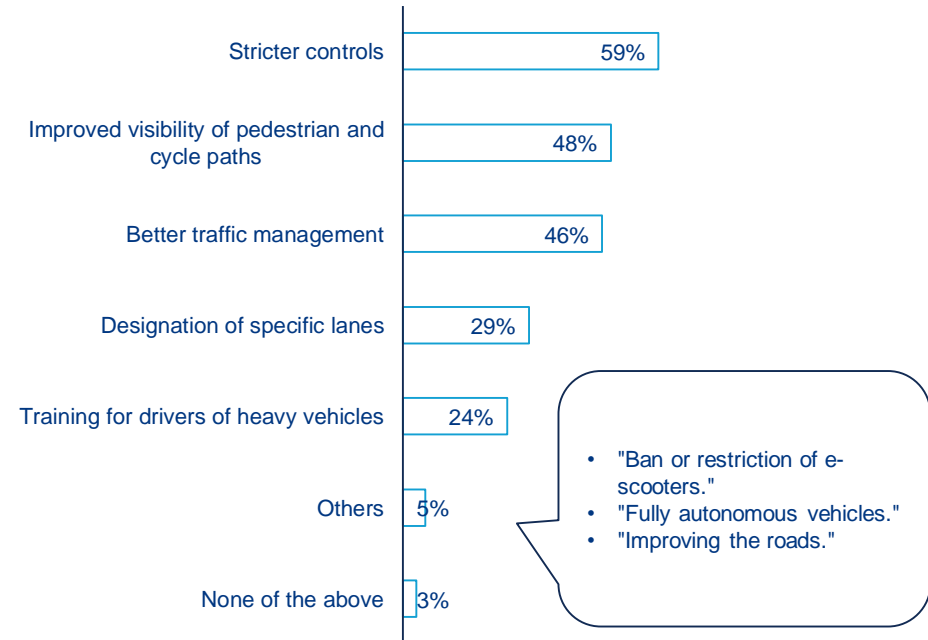
Basis: Main sample (n=1,030); question: "How often do you experience conflicts with other road users (e.g. cars, bicycles, e-bikes, buses, etc.)?", "How high do you estimate the risk of being involved in an accident with a heavy vehicle yourself?", "Have you experienced traffic accidents as a victim or witness in the last 3 years?", "You have stated that you have been involved in a traffic accident in the last 3 years, which means of transport were involved?" (multiple answers possible)

Assessment of accident risks

Types of misconduct in road traffic



Measures for greater road safety



Basis: Main sample (n=1,030); question: "What types of misconduct in road traffic do you perceive most frequently? (multiple answers possible)", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

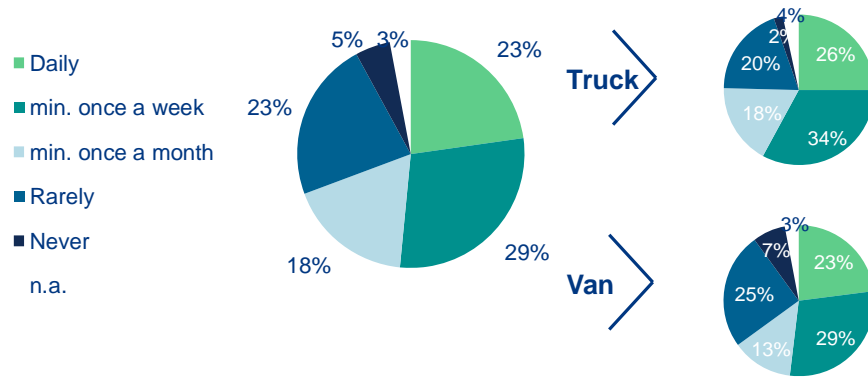
Spain

Drivers of heavy vehicles

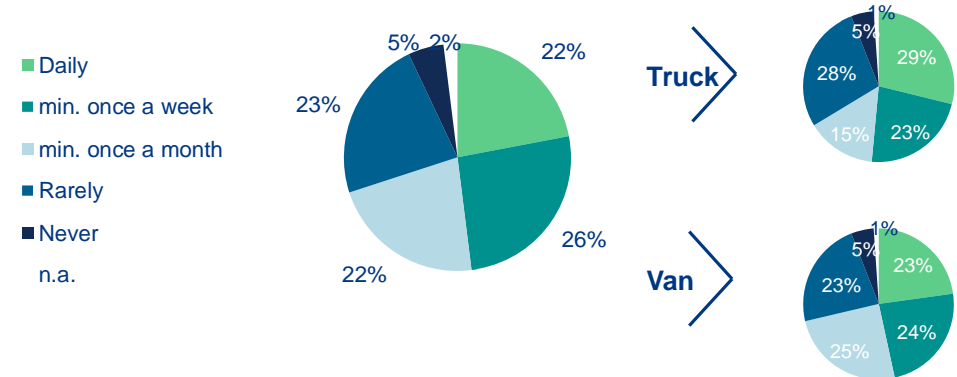
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Conflicts in road traffic

Frequency of experienced conflicts with other road users



Frequency of dangerous situations caused by/involvement of pedestrians or cyclists



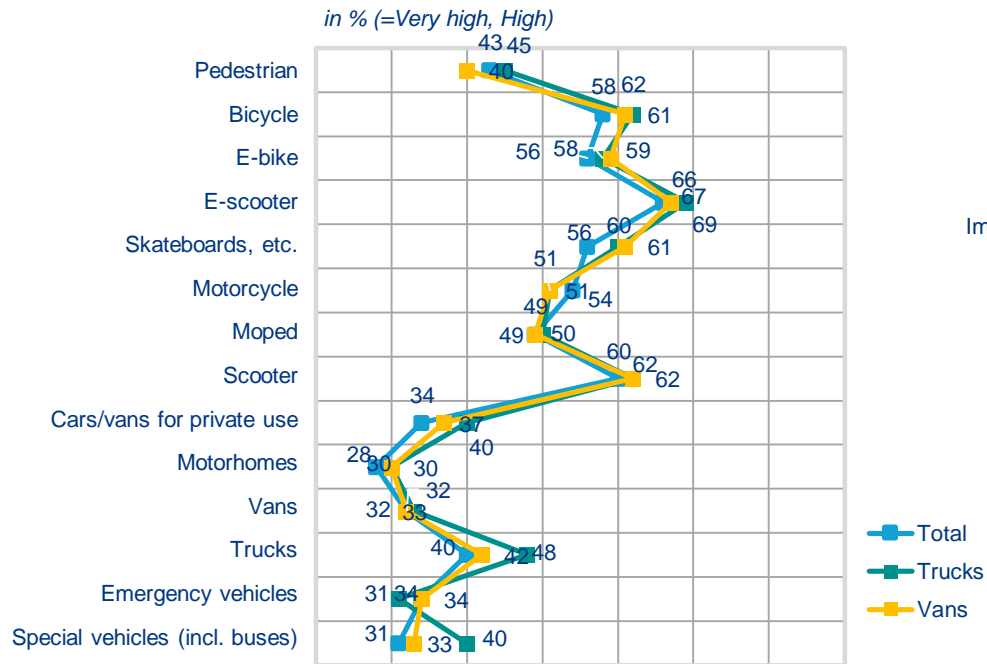
Biggest risks in road traffic



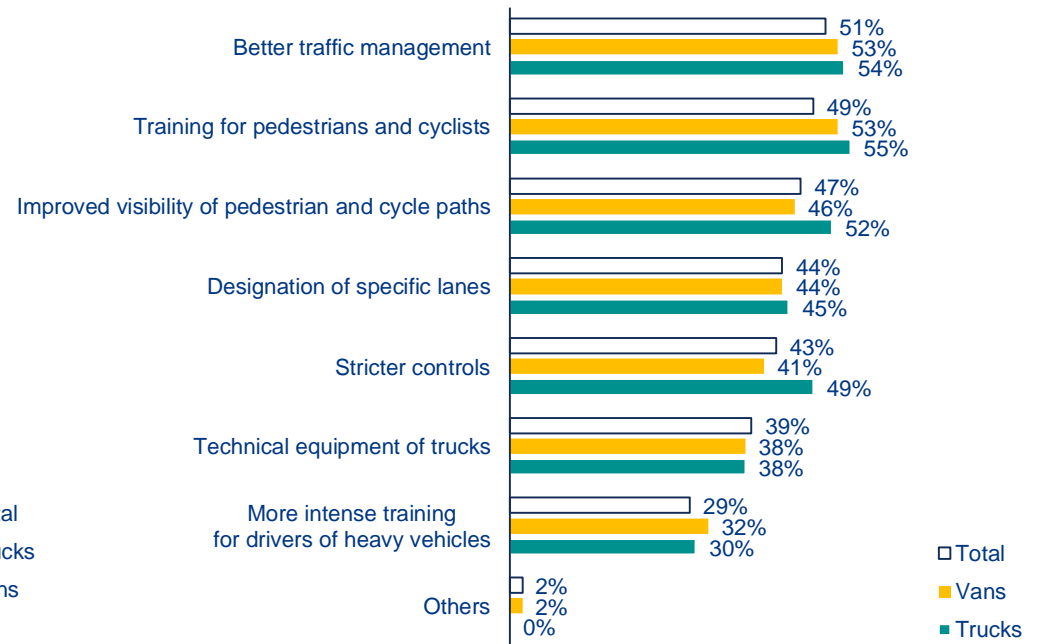
Basis: Boost sample (n=510); Question: "As a driver of heavy vehicles, how often do you experience conflicts with other road users in urban traffic?", "How often do you experience dangerous situations caused by/involving pedestrians or cyclists?", "What is the biggest risk for you in road traffic?"

Assessment of accident risks

Assessment of accident risk with the following road users



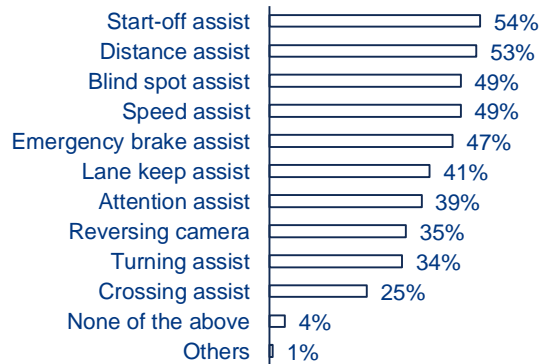
Measures to improve road safety



Basis: Boost Sample (n=517); Question: "How high do you estimate your risk of being involved in an accident with the following vehicles, where one of the following vehicles is the other party involved in the accident?", "In your opinion, what measures would improve safety in urban traffic? (multiple answers possible)"

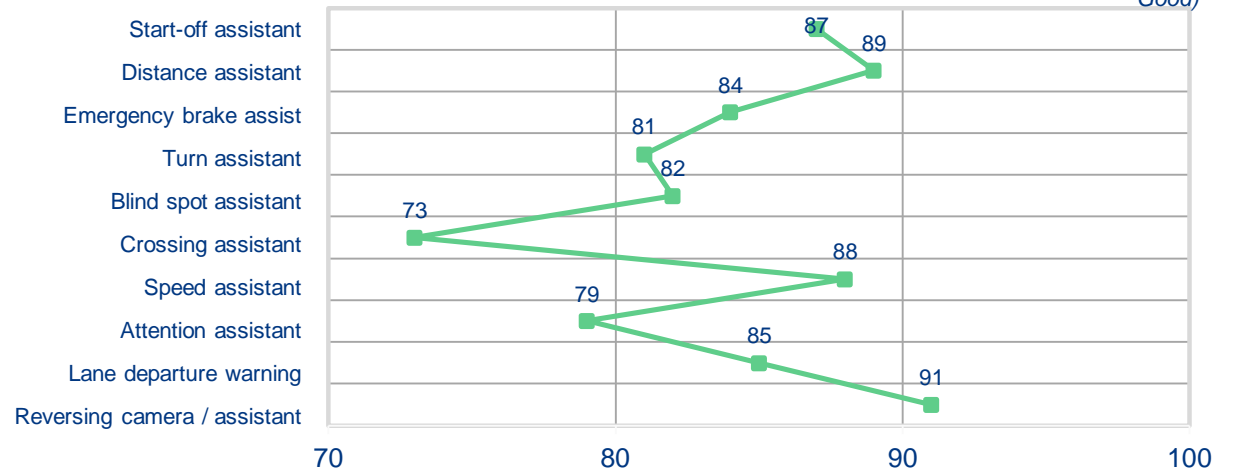
Dealing with assistance systems

Ranking of the (subj.) most helpful systems

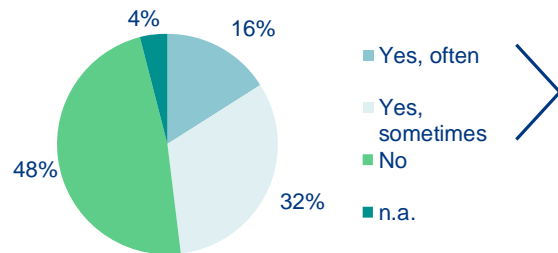


Self-assessment Dealing with systems

Top 2 Box in % (=Very good, Good)



Deactivation of the systems



Reasons for deactivation

Lane departure warning, it is very annoying, loud, and with the noise in the cabin unbearable

Constant speed assistant, I deactivate it when traffic is not flowing to be more alert

Because it's tiring with so many warnings

Basis: Boost sample (n=510); question: " Which assistance systems do you consider helpful and would you support a comprehensive introduction of these systems?" "How familiar are you with the systems?" "Do you deactivate assistance systems?" "What are reasons for deactivation?"