

Mason-Dixon
Polling & Research

DRIVE FOR LIFE

Annual National Driver Survey

August 2004

Conducted by
Mason-Dixon Polling & Research, Inc.

904-261-2444

HOW THE POLL WAS CONDUCTED

This poll was conducted by Mason-Dixon Polling & Research, Inc. of Washington, D.C. from July 29 through August 5, 2004. A total of 1,100 licensed drivers were interviewed nationwide by telephone.

Those interviewed were selected by the random variation of the last four digits of telephone numbers. A cross-section of exchanges was utilized and quotas were assigned in order to ensure an accurate reflection of the demographic profile of drivers nationwide.

The margin for error, according to standards customarily used by statisticians, is no more than plus or minus 3 percentage points. This means that there is a 95 percent probability that the "true" figure would fall within that range if all voters were surveyed. The margin for error is higher for any subgroup, such as an age or gender grouping.

WHAT DO PEOPLE DRIVE?

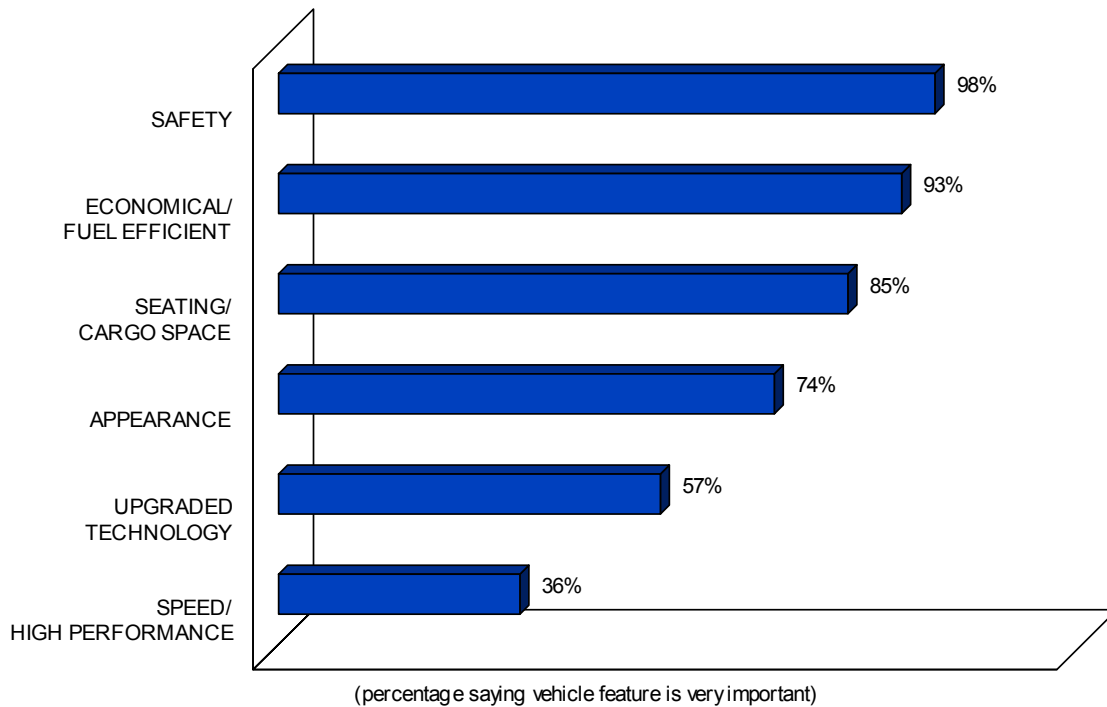
The majority of Americans primarily drive automobiles, but there are significant gender and age differences in primary vehicle use. Men and people between the ages of 26 and 54 are more likely to primarily drive something other than a car. A large majority of women (69%) and drivers over the age of 55 (68%) primarily drive cars.

	CAR	TRUCK	SUV	MINI-VAN
Nationwide	56%	20%	15%	9%
Men	44%	33%	16%	7%
Women	69%	7%	14%	10%
<26	59%	26%	11%	4%
26-54	48%	21%	19%	12%
55+	68%	16%	10%	6%

WHAT DO DRIVERS VALUE IN THEIR MOTOR VEHICLE?

American drivers say they consider safety, fuel efficiency and seating/cargo space as the most important features that they value in their personal motor vehicles. Appearance, technology features and speed/high performance were less important to them.

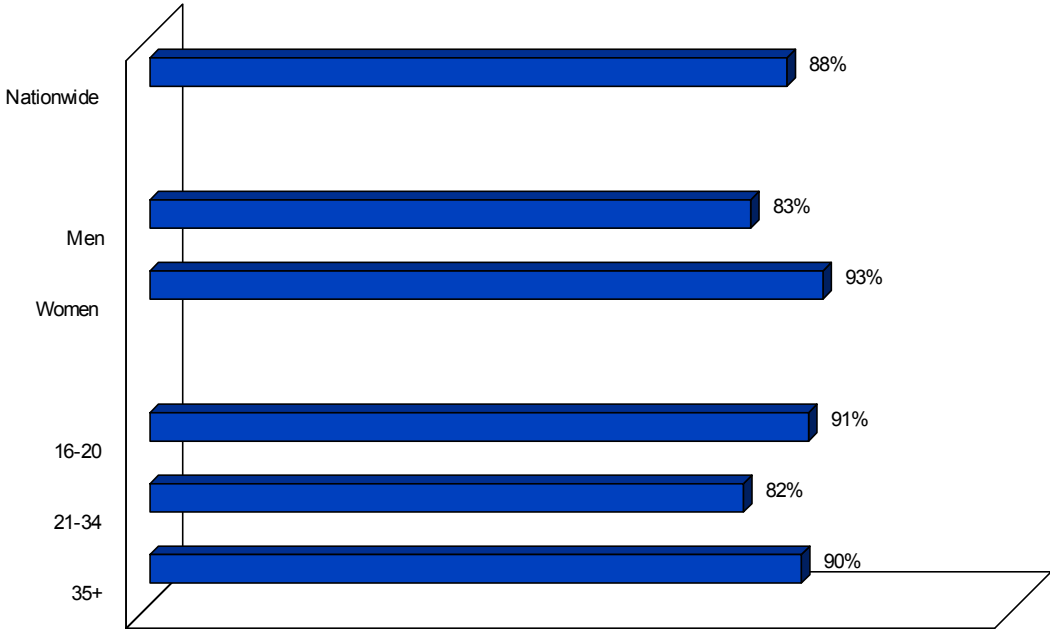
What Drivers Value Most in their Motor Vehicles



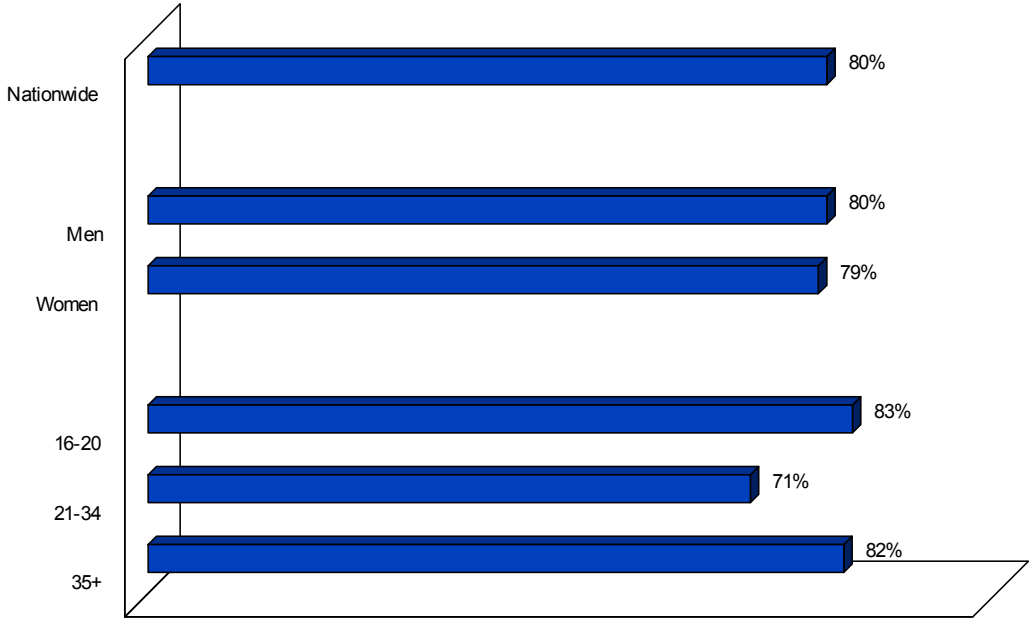
SEAT BELT USE

While a large majority of drivers always wear their seat belt, there is still a significant number who do not. Drivers are even less likely to require all of their passengers to always wear a seat belt. Those who do not wear their seat belts at all times are generally male and between the ages of 21 and 34.

Do you always wear a seat belt?



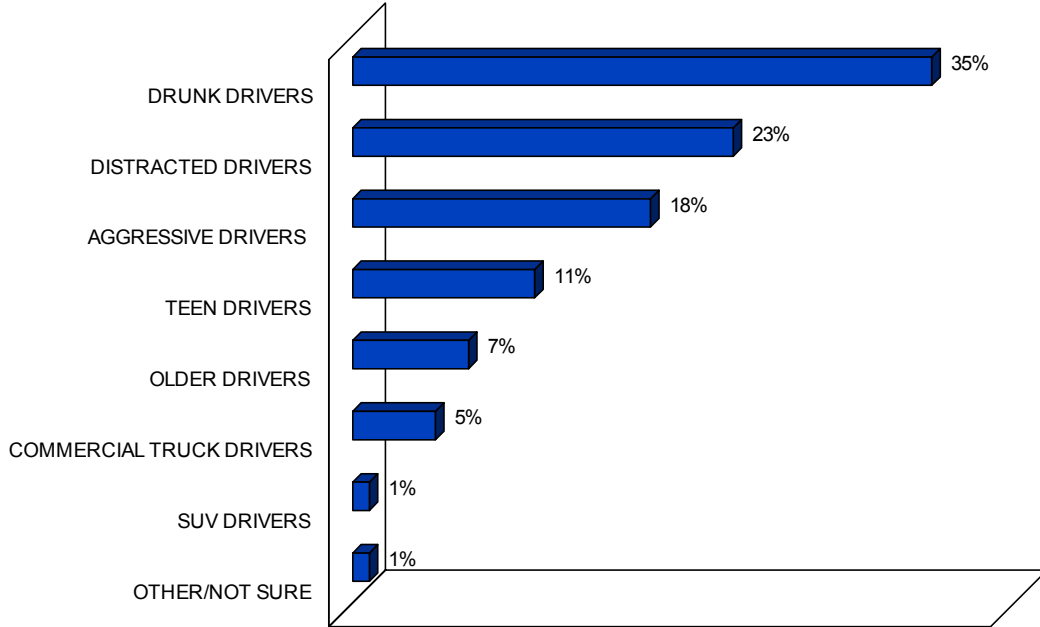
Do passengers wear seat belts in your car?



WHAT DO DRIVERS FEEL MOST THREATENED BY?

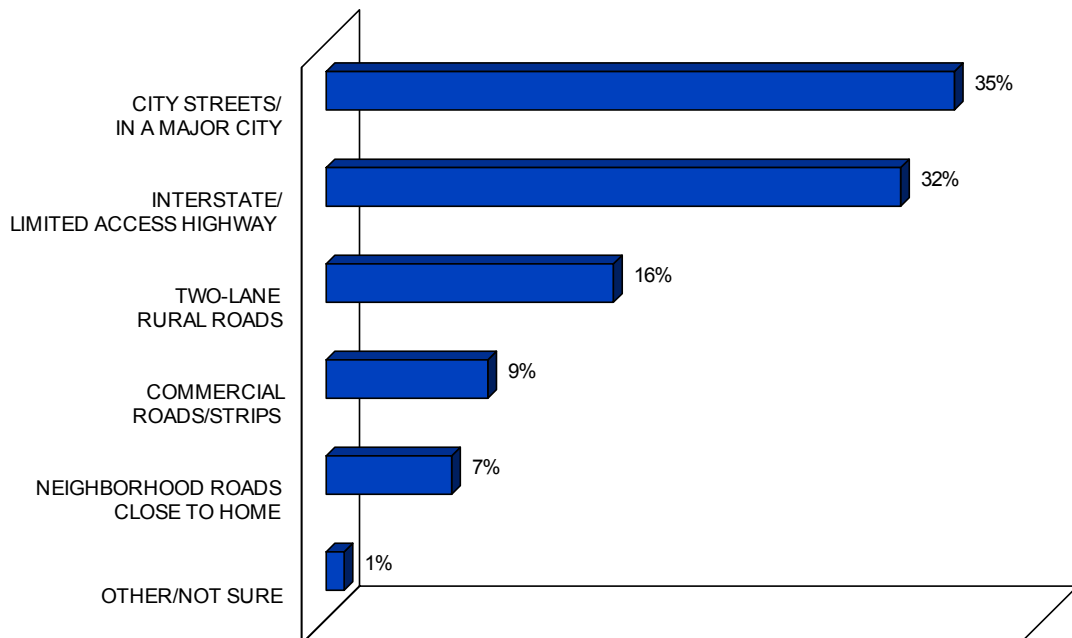
Americans say that Drunk Drivers (35%), Distracted Drivers (23%) and Aggressive Drivers (18%) pose the greatest threat to their safety on the road.

Group that Poses Greatest Threat to Safety on the Road



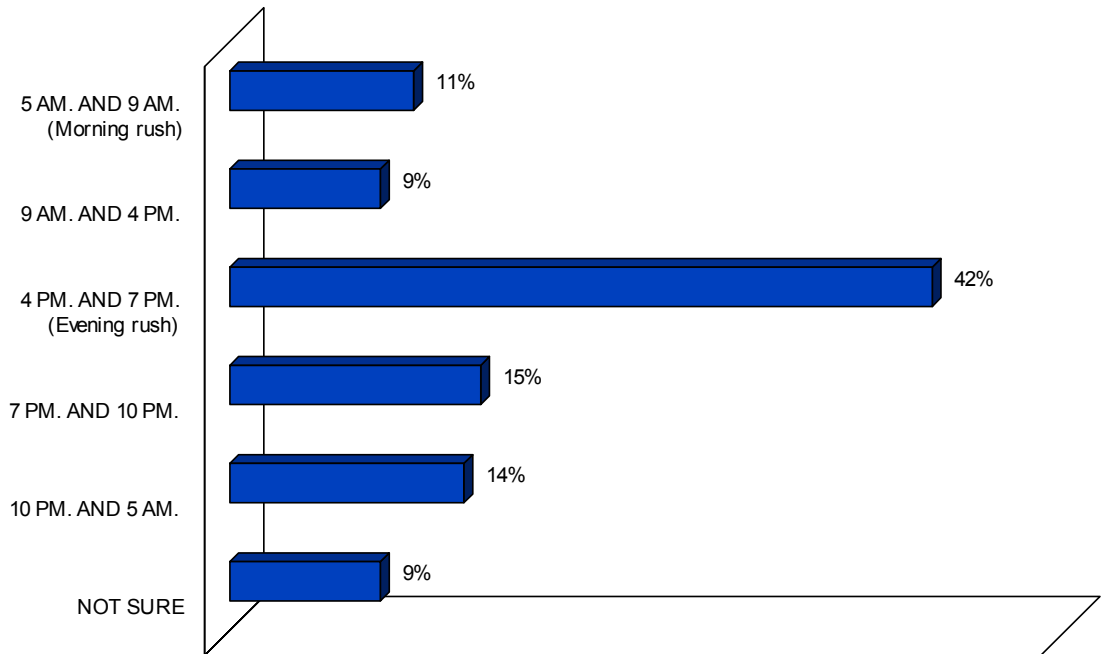
They also feel most at risk to have an accident when driving in the city (35%) and on Interstate or limited Access highways (32%).

Feel Most at Risk When Driving On:



They feel most likely to be involved in an accident when driving during the evening rush hour (between 4 pm. and 7 pm.).

Time of day most likely to have accident?



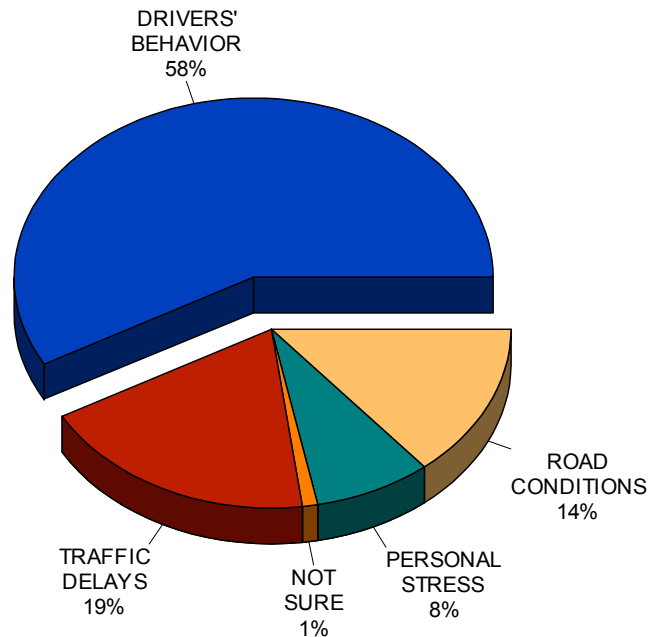
A significant 40% of American drivers say they find driving at least “somewhat aggravating” most of the time. Men (44%) and those under the age of 45 (46%) are more likely to find driving aggravating.

A similar number of drivers (41%) say they find driving at least “somewhat more aggravating” than two years ago. This is particularly true of drivers age 45 and up (46%).

FIND DRIVING AGGRAVATING MOST OF THE TIME?	YES	NO
Nationwide	40%	60%
Men	44%	56%
Women	37%	63%
<45	46%	54%
45+	35%	65%
FIND DRIVING MORE AGGRAVATING THAN 2 YEARS AGO?	YES	NO/ NOT SURE
Nationwide	41%	59%
Men	42%	58%
Women	42%	58%
<45	37%	63%
45+	46%	54%

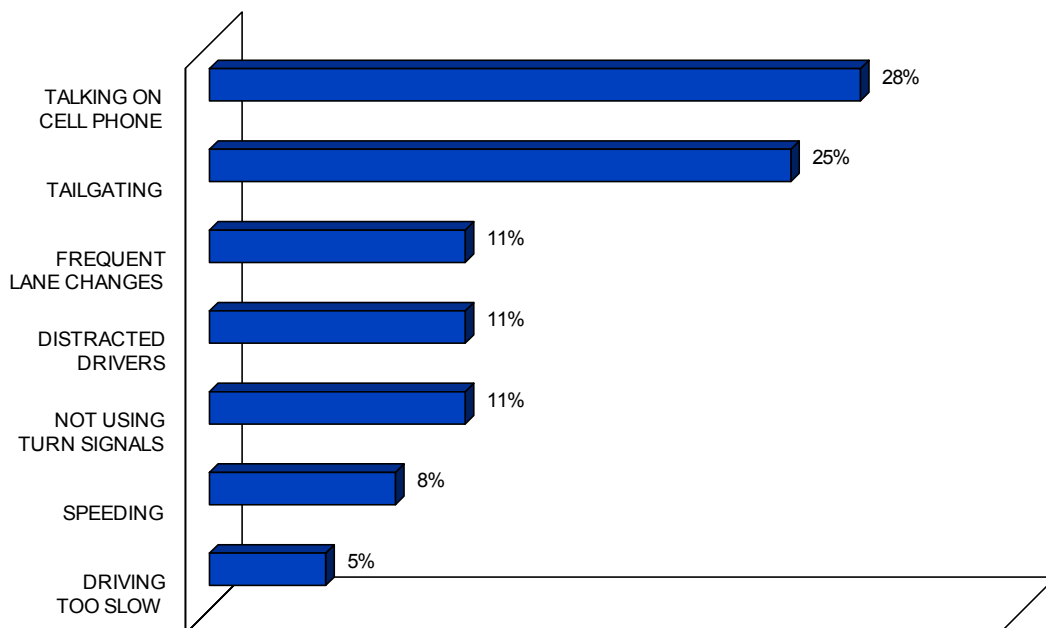
A majority of drivers say that behavior of other drivers (58%) is what most aggravates them, far ahead of traffic delays (19%) and road conditions (14%).

What most aggravates you?



Drivers who talk on their cell phones while driving (28%) and those who tailgate (25%) are the behaviors of other drivers that most aggravate American motorists. Men (47%) appear more concerned by drivers who are talking on their cell phones or are otherwise distracted than women (33%), while women are more concerned by those who practice aggressive driving habits (63%) than men (47%).

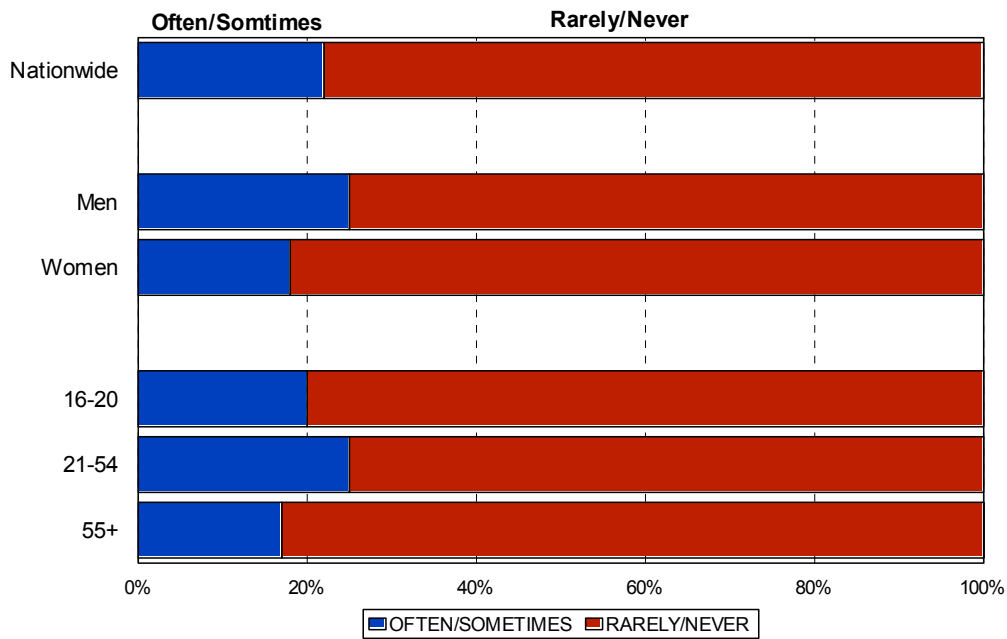
Other driver behavior that aggravates you most?



Slightly more than one out of every five drivers (22%) indicated that their driving is effected by anger at least some of the time. Those most affected are men (25%) and those between the ages of 21 and 54 (25%).

ANGER EFFECTS DRIVING	OFTEN/SOMETIMES	RARELY/NEVER
Nationwide	22%	78%
Men	25%	75%
Women	18%	82%
16-20	20%	80%
21-54	25%	75%
55+	17%	83%

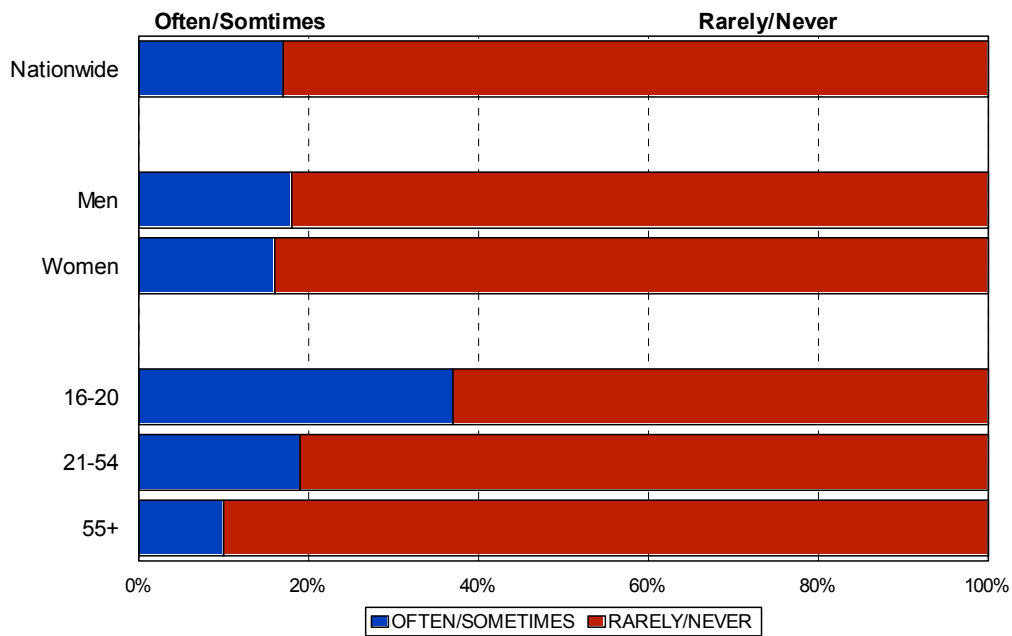
Does anger effect your driving?



DRIVE WHILE UPSET	OFTEN/SOMETIMES	RARELY/NEVER
Nationwide	17%	83%
Men	18%	82%
Women	16%	84%
16-20	37%	63%
21-54	19%	81%
55+	10%	90%

A significant 17% admit that that drive while “emotionally upset” at least some of the time. This behavior is noticeably higher among drivers under the age of 21 (38%).

Drive while emotionally upset?



DRIVING PRACTICES

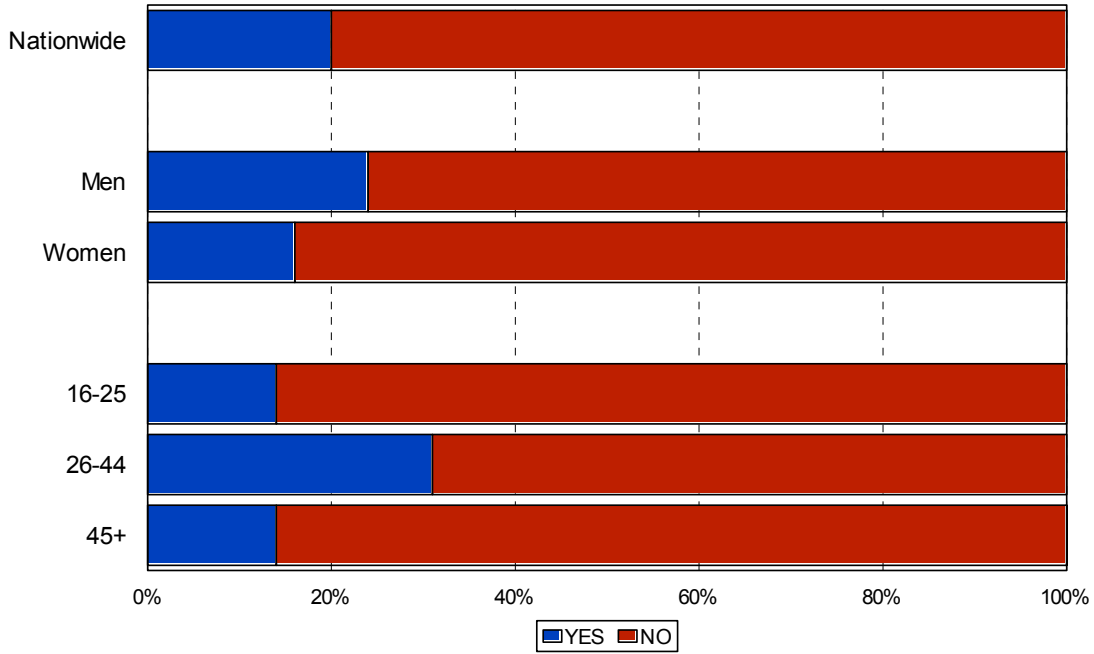
One out of every five American drivers (20%) admits that their driving is usually “fast, aggressive and hurried.” Men (23%) and those between the ages of 21 and 34 (30%) are more likely to be fast/aggressive drivers.

PERSONAL DRIVING	SLOW/CONSERVATIVE/ CAUTIOUS	FAST/AGGRESSIVE/ HURRIED	NEITHER/ REFUSED
Nationwide	78%	20%	2%
Men	74%	23%	3%
Women	81%	17%	2%
16-20	89%	11%	-
21-34	69%	30%	1%
35-44	73%	24%	3%
45+	82%	15%	3%

Within the past five years, 20% have been in a motor vehicle collision as a driver, and 26% have received a traffic ticket. Men (24%) and those between the ages of 26 and 44 (31%) are most likely to have had an accident.

BEEN IN COLLISION WITHIN PAST 5 YEARS?	YES	NO
Nationwide	20%	80%
Men	24%	76%
Women	16%	84%
16-25	14%	86%
26-44	31%	69%
45+	14%	86%

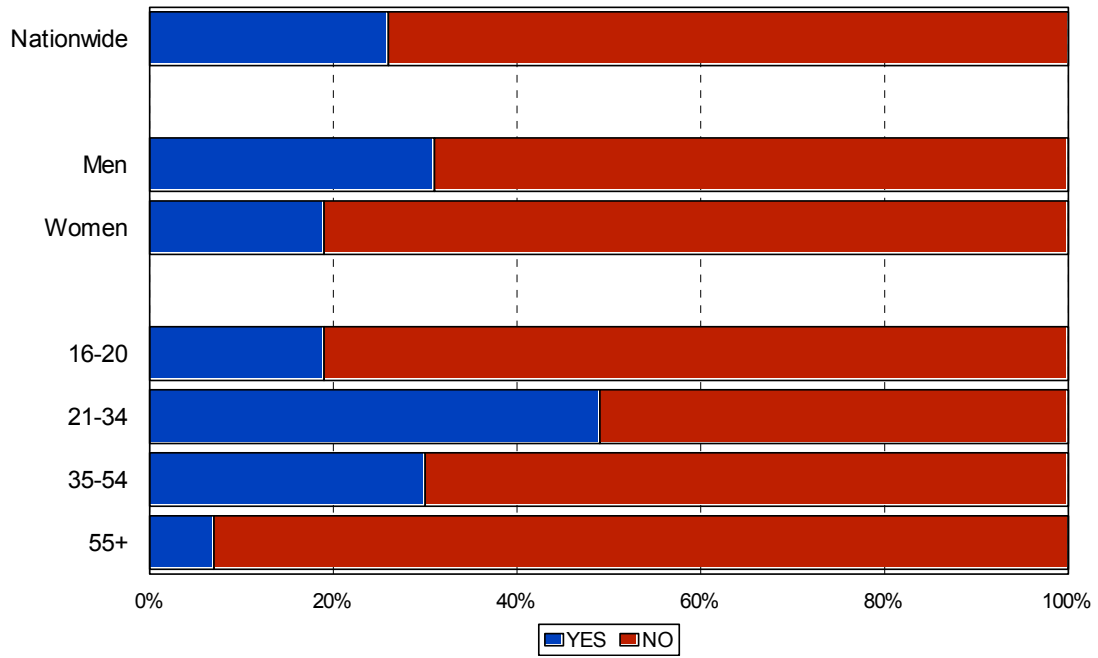
Involved in Motor Vehicle Collision in Past 5 Years



Men (31%) and those between the ages of 21 and 34 (49%) are most likely to have received a traffic ticket.

RECEIVED TRAFFIC TICKET WITHIN PAST 5 YEARS?	YES	NO
Nationwide	26%	74%
Men	31%	69%
Women	19%	81%
16-20	19%	81%
21-34	49%	51%
35-54	30%	70%
55+	7%	93%

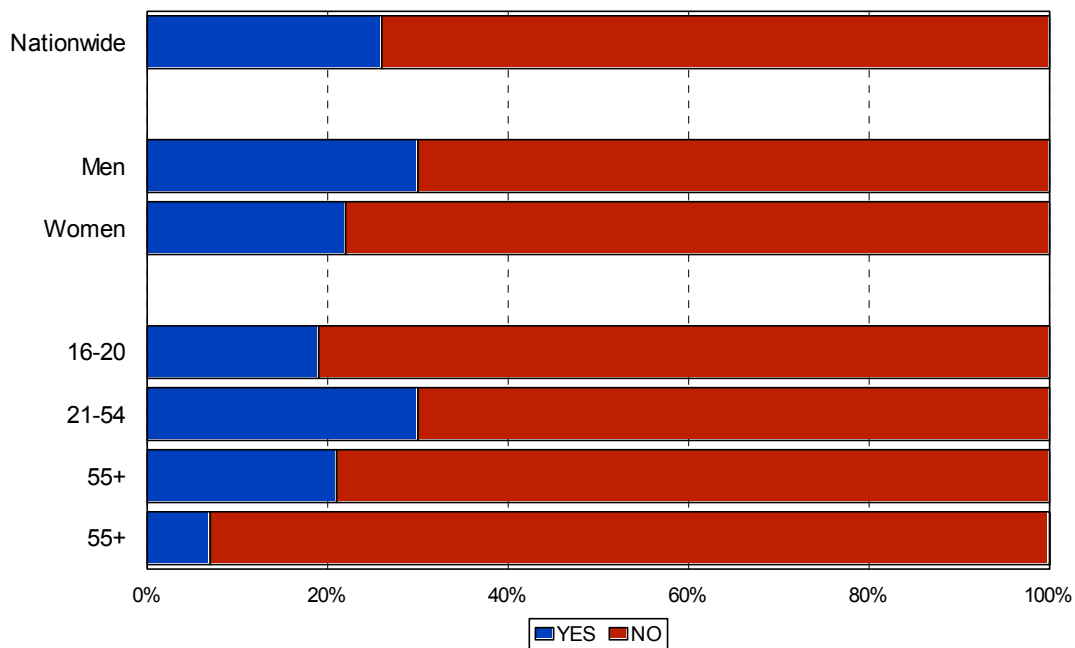
Received Traffic Ticket Within Past 5 Years



More than one out of every four American drivers (26%) indicated they would drive after drinking an alcoholic beverage. Men (30%) and those between the ages of 21 and 54 (30%) were most likely to drive after drinking.

WOULD YOU DRIVE AFTER DRINKING ALCOHOL?	YES	NO
Nationwide	26%	74%
Men	30%	70%
Women	22%	78%
16-20	19%	81%
21-54	30%	70%
55+	21%	79%

Would Drive After Drinking Alcohol

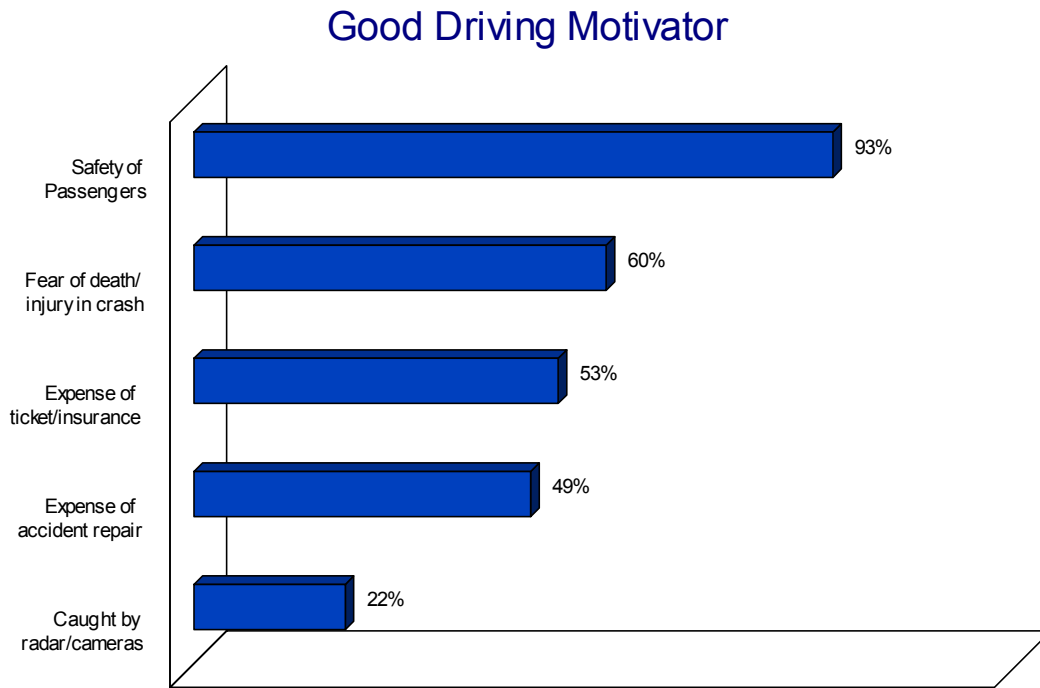


The majority of those that indicated they would drink and drive, said they would do so if they had also eaten (86%), had no more than two drinks (82%), only had a short distance to drive (72%), or had drunk only beer or wine and not hard liquor (63%).

DRIVER SAFETY

Almost half of American drivers (45%) check their tire pressure less than once a month, and 45% also indicated that they have not checked their brakes within the past six months. A significant 38% do not always have their car serviced before a long road trip.

Passenger safety and fear of death or injury are the primary motivators for drivers to practice safe driving habits. Drivers are less motivated by fear of getting a ticket, higher insurance rates, vehicle repair costs and by being caught by radar or a red light camera.



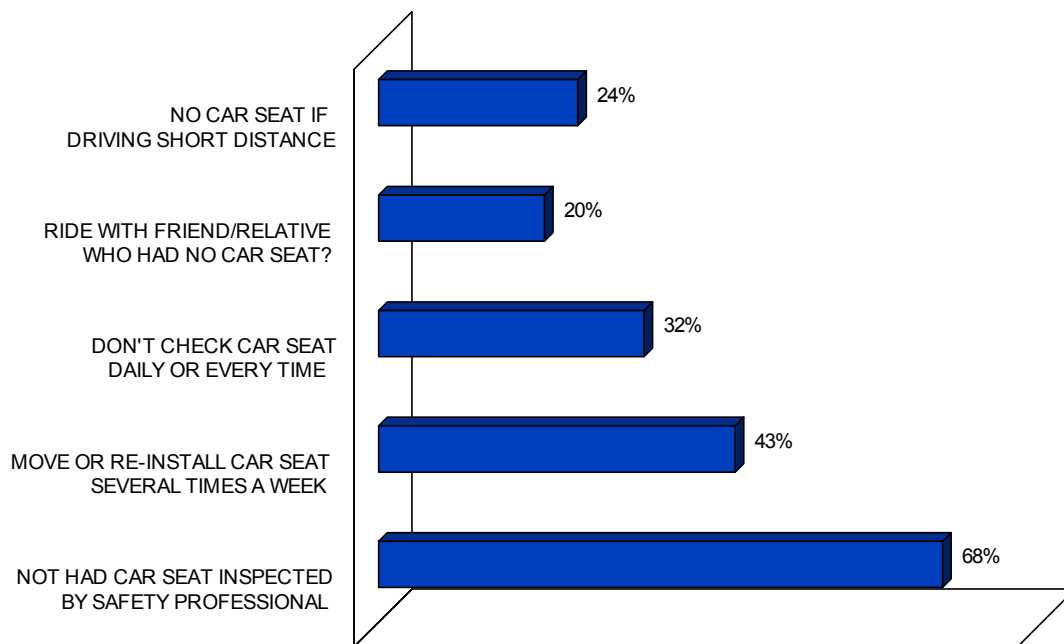
GOOD DRIVING MOTIVATOR	MAJOR CONCERN	MINOR CONCERN	NOT A CONCERN	NOT SURE
Safety of Passengers	93%	5%	2%	-
Fear of death/injury in crash	60%	18%	21%	1%
Expense of ticket/insurance	53%	32%	15%	-
Expense of accident repair	49%	34%	17%	-
Caught by radar/cameras	22%	40%	37%	1%

PRACTICES OF DRIVERS WITH CHILDREN

Overall, 31% of drivers (337 or 1,100 surveyed) have children age 12 or under. The majority of parents (55%) indicated they still had at least one child using a car seat. Almost one out of four of these parents (24%) stated that they allowed their child to ride in a car outside the car seat if the “were only going a short distance.” One in five (20%) said they would allow their child to ride without a car seat if they were riding in a friend or relative’s car and no car seat was available.

Almost one out of three parents with a child currently in a car seat (32%) indicated that they do not check their car seat at least once a day or every time they drive, and 43% of parents with a child still in a car seat stated that they move or re-install their car seat everyday or several times a week. A large majority of these parents (68%) said they have never had their car seat checked by a child safety professional.

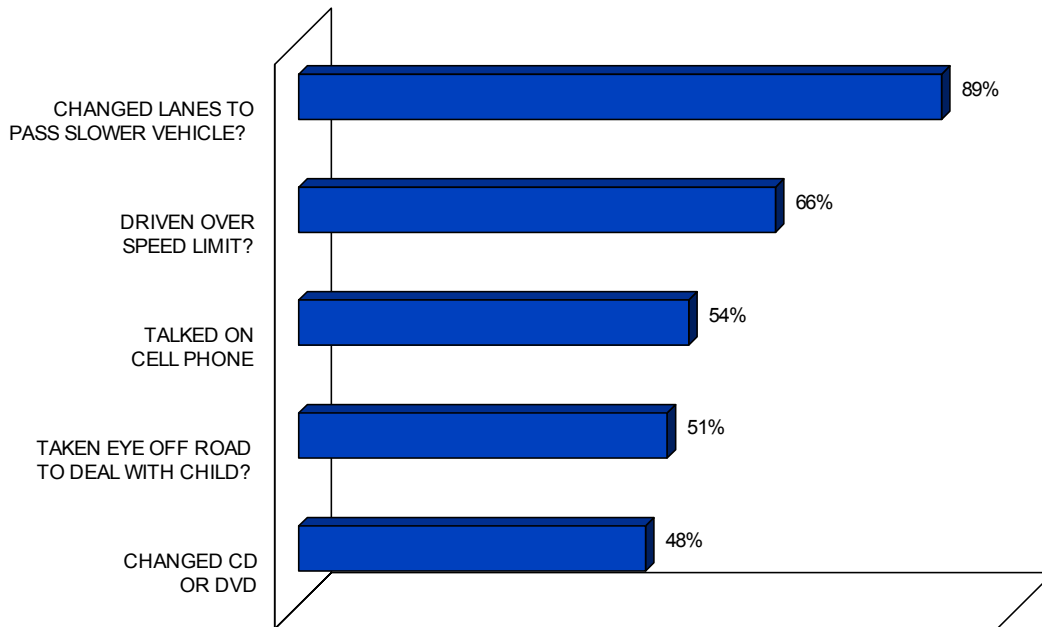
Parents With Child In Car Seat



Among parents who no longer have a child in a car seat, a majority (65%) indicated that they stopped using the car seat before their child was six years old.

A majority of parents with children age 12 or under indicated they had committed several dangerous driving practices when driving with a child. The largest majority (89%) said they had changed lanes to pass a slower vehicle, while 66% have driven over the speed limit, 54% have talked on their cell phone and 51% have taken their eyes off the road to deal with their child. Although a minority, a significant 48% have changed a CD or DVD while driving.

While Driving With Child Under 12 In Car, In Past Year



Finally, 15% of parents have allowed their child to remove their seat belt in order to sleep while on a long trip, and 40% have allowed their child to sit in the front seat before they reached the age of nine and 51% allowed them in the front seat before they were age 11.

DRIVE FOR LIFE POLL 2004 RESULTS

1,100 licensed drivers interviewed by telephone nationwide July 29 through August 5, 2004 by Mason-Dixon Polling & Research, Inc. of Washington, D.C. Margin for error is plus or minus 3%.

QUESTION: What type of vehicle do you drive the most?

Car	56%
Truck	20%
SUV	15%
Minivan	9%
Motorcycle	-
Refused (NOT READ)	-

QUESTION: Which of the following vehicle features are very important to you?

	<u>YES</u>	<u>NO</u>
- Speed/high performance	36%	64%
- Safety	98%	2%
- Appearance	74%	26%
- Upgraded technology features	57%	43%
- Seating and cargo space	85%	15%
- Economical/fuel efficient	93%	7%

QUESTION: Do you wear a seat belt:

Always	88%
Most of the time	7%
Some of the time	4%
Rarely or Never	1%

(IF NOT "ALWAYS" n=132) QUESTION: Which of the following are times when you usually do not wear your seat belt?

	<u>YES</u>	<u>NO</u>
- When traveling a short distance?	98%	2%
- When staying close to home?	96%	4%
- When traveling on neighborhood streets?	70%	30%
- When traveling on the highway?	36%	64%
- When riding as a front seat passenger?	33%	67%
- When riding as a back street passenger?	45%	55%
- When on a long trip?	53%	47%

QUESTION: Does every occupant in your car wear a seat belt?

Always	80%
Most of the time	15%
Some of the time	5%
Rarely or Never	-

QUESTION: Which group do feel poses the greatest threat to your safety on the road? (ORDER ROTATED)

Drunk drivers	35%
Distracted drivers	23%
Aggressive drivers	18%
Teen drivers	11%
Older drivers	7%
Commercial truck drivers	5%
SUV drivers	1%
Other/Not Sure (NOT READ)	1%

QUESTION: When you drive, where do you feel most at risk of getting into a motor vehicle accident? (ORDER ROTATED)

City streets/driving in a major city	35%
Interstate/limited access highways	32%
Two-lane rural roads	16%
Major suburban commercial roads/strips	9%
Neighborhood roads close to home	7%
Other/Not Sure (NOT READ)	1%

QUESTION: When you drive, at what time of day do you feel most likely to be involved in a motor vehicle accident?

Between 5 am. and 9 am.	11%
Between 9 am. and 12 noon	4%
Between 12 noon and 4 pm.	5%
Between 4 pm. and 7 pm.	42%
Between 7 pm. and 10 pm.	15%
Between 10 pm. and 5 am.	14%
Equal all times/None (NOT READ)	8%
Not Sure (NOT READ)	1%

QUESTION: Which of the following statements best describes the way you drive most of the time: slow, conservative and cautious, or fast, aggressive and hurried?

Slow/conservative/cautious	78%
Fast/aggressive/hurried	20%
Neither/Refused (NOT READ)	2%

QUESTION: Most of the time, do you find driving very aggravating, somewhat aggravating, not too aggravating, or not aggravating at all?

Very Aggravating	5%
SW Aggravating	35%
Not Too Aggravating	30%
Not At All Aggravating	30%

QUESTION: Compared to 2 years ago, do you find driving much more aggravating, somewhat more aggravating, about the same, or less aggravating?

Much more aggravating	19%
SW more aggravating	22%
About the same	52%
Less aggravating	6%
Not Sure	1%

QUESTION: Which one of the following do you find most aggravating while driving? (ORDER ROTATED)

Other drivers' behavior	58%
Traffic delays	19%
Road conditions	14%
Being hurried/personal stress	8%
None/Not Sure (NOT READ)	1%

QUESTION: Which one of the following driving behaviors by other drivers most aggravates you? (ORDER ROTATED)

Driving while talking on a cell phone	28%
Tailgating	25%
Frequent lane changes	11%
Driving while distracted (kids/eating)	11%
Failing to use turn signals	11%
Speeding	8%
Driving too slow or cautiously	5%
Honking the car horn excessively	-
Other/Not Sure (NOT READ)	1%

QUESTION: How often does your own anger affect your driving behavior?

Often	5%
Sometimes	17%
Rarely	48%
Never	30%

QUESTION: How often do you drive when you are emotionally upset?

Often	3%
Sometimes	14%
Rarely	48%
Never	35%

QUESTION: As a driver, have you been in a motor vehicle collision:

Within the past year	3%
1-2 years ago	4%
3-5 years ago	13%
More than 5 years ago	45%
Never	35%

(IF THEY HAD A COLLISION n=709) QUESTION: Would you say your driving behavior improved after being in that collision, or not?

Yes	54%
No	45%
Not Sure	1%

QUESTION: As a driver, have you received a traffic ticket

Within the past year	8%
1-2 years ago	9%
3-5 years ago	9%
More than 5 years ago	43%
Never	31%

(IF THEY HAD A TICKET n=754) QUESTION: Would you say your driving behavior improved after getting that ticket, or not?

Yes	52%
No	47%
Not Sure	1%

QUESTION: How strongly does each one of the following motivate you to observe good driving practices? - Is it a major motivator, minor motivator, or of not much concern?

- Fear of death or injury in a crash?

Major	60%
Minor	18%
No Concern	21%
Not Sure	1%

- Expense of replacing/repairing your vehicle after an accident?

Major	49%
Minor	34%
No Concern	17%

- Expense of getting a ticket, paying a fine and paying higher insurance rates?

Major	53%
Minor	32%
No Concern	15%

- Getting caught by a monitoring device, such as radar or a red light camera?

Major	22%
Minor	40%
No Concern	37%
Not Sure	1%

- The safety of your passengers?

Major	93%
Minor	5%
No Concern	2%

QUESTION: Would you ever drive after drinking an alcoholic beverage?

Yes/Maybe/Depends	26%
No/Never	74%

(IF "YES" n=287) QUESTION: Would you consider doing so in any of the following situations?

	<u>YES</u>	<u>NO</u>
- If you only had to drive a short distance?	72%	28%
- If you have had no more than two drinks?	82%	18%
- If you have also eaten?	86%	14%
- If you only drank beer or wine, but not hard liquor?	63%	37%

QUESTION: How often do you check your tire pressure?

Weekly	14%
Monthly	37%
Rarely	18%
Only before a long trip	6%
Only if I notice tires are low	21%
Not Sure (DO NOT READ)	4%

QUESTION: When did you last have your brakes checked?

Within last six months	59%
6 months - 1 year ago	28%
1-2 years ago	3%
More than 2 years ago	6%
Not Sure (DO NOT READ)	4%

QUESTION: Do you have your car serviced before a long road trip:

Always	62%
Sometimes	15%
Only if you know something is wrong with it	6%
Rarely or never	13%
Not Sure (NOT READ)	4%

QUESTION: Do you go out of your way to buy cheaper gasoline, or not?

Yes	35%
No	65%

QUESTION: Do you have any children age 12 or under?

Yes	31%
No	69%

***** PARENTS WITH CHILDREN 12 AND UNDER (n=337) *****

QUESTION: Do you have any children that are still using a car seat?

Yes	55% (184)
No	45% (153)

(IF "NO" n= 153) QUESTION: At what age did was your last child when you stopped putting them in a car seat?

Never used car seat	-
<4 years old	8%
4-5 years old	57%
6-7 years old	31%
8+ years old	3%
Not Sure	1%

(IF "YES" n= 184) QUESTION: In the past year, in what circumstances has your child ridden in a car with no restraint or with an adult seat belt?

	<u>YES</u>	<u>NO</u>
- When riding with a friend or relative and no car seat was available?	20%	80%
- When we were only going a short distance?	24%	76%
- In a taxi?	10%	90%
- When there were more children than car seats?	17%	83%

(IF "YES" n=184) QUESTION: How often do you check that your child's car seat is installed safely?

Daily/every time I use it	68%
Weekly	16%
Monthly	13%
Occasionally	2%
Rarely/Never	1%

(IF "YES" n=184) QUESTION: Have you had your car seat installation checked by a trained child passenger safety professional?

Yes	32%
No	68%

(IF "YES" n=184) QUESTION: How often do you move and reinstall your car seat?

Everyday	17%
Several times a week	26%
Several times a month	2%
Rarely	54%
Not Sure (NOT READ)	1%

***** PARENTS WITH CHILDREN 12 AND UNDER (n=337) *****

QUESTION: In the past month, have you driven with your children in the car and...

	<u>YES</u>	<u>NO</u>
- Talked on a cell phone?	54%	46%
- Changed CD or DVD?	48%	52%
- Taken your eyes off the road to deal with children?	51%	49%
- Driven over the speed limit?	66%	34%
- Changed lanes to go around a slower car?	89%	11%

QUESTION: On a long trip do you allow your children to remove their seat belt or adjust it so they can lie down to sleep?

Yes	15%
No	85%

QUESTION: At what age would you allow your child to sit in the front seat?

<5 years old	1%
5-6 years old	24%
7-8 years old	15%
9-10 years old	11%
11-12 years old	25%
13+ years old	20%
Not Sure	4%

DEMOGRAPHICS:

- What is your age?	16-20	64	(6%)
	21-25	76	(7%)
	26-34	173	(16%)
	35-44	195	(18%)
	45-54	204	(18%)
	55-64	207	(19%)
	65+	179	(16%)
	Refused	2	

- Which of the following best describes your race or ethnicity?

White, Anglo or Caucasian	818	(74%)
Black or African-American	133	(12%)
Hispanic, Latino or Cuban	96	(9%)
Asian or Middle Eastern	35	(3%)
Native American or other	12	(1%)
Refused (NOT READ)	6	(1%)

- NOTE SEX:	Male	554	(50%)
	Female	546	(50%)

- NOTE REGION:	Northeast	256	(23%)
	Midwest	237	(22%)
	South	327	(30%)
	West	280	(25%)