



## THINK! Annual Survey TNS-BMRB Report



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# 1. Introduction

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## 1.1 Background

The THINK! Road Safety publicity campaign was launched in 2000, as part of the Government's road safety strategy, *Tomorrow's roads: safer for everyone*. The strategy set out targets to reduce road casualties in Great Britain by 50% for children, 40% overall and 10% reduction in the slight casualty rate between 2000 and 2010. A mix of engineering, enforcement and education measures are used to help meet these targets, of which the THINK! Road safety publicity campaign forms part. Moving forward into 2011 and beyond, it is likely the evolution of the strategy will be developed within the wider context of transport sustainability.

The THINK! campaign aims to encourage all road users to recognise that it's the small things they do that can lead to crashes on the road and that there are simple steps they can take to reduce their risk to themselves and others. THINK!'s power is that it fosters an attitude of shared responsibility.

THINK! campaign priorities are identified by the Department for Transport's publicity team in collaboration with policy officials in Road User Safety Division. They are chosen because they account for the highest number of road casualties and it is felt that they will benefit most from coordinated national publicity.

## 1.2 Research objectives and method

In July 2006 legacy BMRB Social Research (now TNS-BMRB) took over the evaluation of the THINK! campaign. This report focuses on the Annual Survey research carried out in January-February 2011. The Annual Survey differs to the normal waves of THINK! research in that a focus was placed on gaining annual KPI measures of road safety attitudes and behaviour among the British population, rather than simply focusing in on campaign measurement and evaluation.

The January-February 2011 Annual Survey covered the following elements:

- Awareness of, attitudes towards, and perceptions of the THINK! road safety brand as a whole;
- General attitudes towards road safety, and its perceived importance in relation to other social issues;
- Attitudes towards driving, and influences on driving behaviour;
- Driving and road safety behaviour among different users, including the prevalence of dangerous driving behaviour;

Fieldwork for the Annual Survey ran from 24 January to 23 February 2011 among adults aged 16+ in Great Britain. Interviews were conducted in-home using Computer

Assisted Personal Interviewing (CAPI) by fully trained members of TNS-BMRB's own fieldforce, working under supervision. The sample was drawn by means of Random Location sampling (see appendices for further details).

In total 2,003 interviews were conducted with those aged 16+ in Great Britain. Of these, 1,371 were motorists (defined as those who drove a car, van, lorry or motorcycle in a typical week).

Data were weighted to be representative of the population. Only weighted data are shown in this report.

### **1.3 Arrangement of this report**

This report describes the results from the January-February 2011 Annual Survey wave of research for the THINK! road safety campaign, compared with the results from the 2006, 2007, 2008 and 2009 Annual Surveys. These previous waves of the survey were all carried out using legacy BMRB's face to face Omnibus, which used the same sampling approach and interviewing techniques, and therefore all data are comparable. Where it is relevant, comparisons over time have also been drawn with earlier waves of research carried out by two research agencies - GFK-NOP in June 2005 (by PAPI methodology) and TNS in October 2005, March 2006 and May 2006 (by CAPI methodology).

Following this introduction is a management summary of the findings. The main body of the report provides a detailed commentary, illustrated by summary tables and charts. Appendices contain details of the sampling method, weighting, the sample profile and the questionnaire. Data have been supplied in separate volumes.

In charts and tables '-' denotes 0 and '#' denotes a proportion of less than half of one per cent, but more than 0. Significant changes (at the 95% confidence level) between 2009 and 2011 have been indicated on charts by '\*\*'.

## 2. Management summary

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### 2.1 Introduction and background

This report focuses on the THINK! Annual Survey, carried out in January-February 2011. A total of 2,003 interviews were conducted in Great Britain, with those aged 16+. Among these, 1,371 interviews were conducted with motorists.

### 2.2 Road user profile

Levels of road usage per week have remained relatively stable over the years, with walking far ahead of other types of road usage (96% in 2011). In 2011, three quarters of respondents (76%) rode as passengers, while the proportion who drove a car for non work-related reasons rose to 68% (up from 62% in 2006). Four in ten (37%) used a car to get to and from work, a figure that has also seen a rise (up from 35% in 2009). Lower proportions drove as part of their job (24%) or used other means of transport (19% rode bicycles, 7% drove a van or lorry, and 3% rode motorcycles, scooters or mopeds).

As in previous years, short local journeys by motor vehicle were made by almost all drivers (97%), though women were more likely than men to make a trip of this kind on five or more occasions in a typical week (50%, compared with 43% of men). Around nine in ten drivers made journeys in the dark, on motorways, or on country roads, and a similar proportion made a long journey (defined as 50 miles or more) or a journey with passengers. Seven in ten drivers (71%) drove to a pub or restaurant. Work-related journeys were less common: almost six in ten drivers (56%) drove to and from work and around a third (36%) drove as part of their job.

The proportion of drivers whose annual mileage exceeded 5,000 miles was slightly higher in 2011 (58%) than in the previous year (51%). In terms of driving experience however, 2011 respondents were no different to those in previous years, with the majority of motorists (62%) having driven for over 20 years.

### 2.3 Attitudes towards road safety

When asked to specify the most important road safety issues for the Government to address, drink-driving was the most commonly mentioned (59%), followed by speeding (44%) and use of mobile phones without a hands free kit (43%). These three issues have headed the list since 2006, although the number rating drink-driving as a top three issue to address has fallen from 70% in 2008.

A visible police presence was felt to be the most effective influence on driving safely, rated in the top three by over half (54%) of motorists. This was followed by speed cameras (43%), the threat of prosecution or fines (41%), and influence of family

(38%). These were also the top four influences when this question was asked in previous years. The proportion citing road safety advertising as one of their top three influences has declined slightly in 2011, and now stands at 16%. This should not be unexpected, due to lower levels of road safety advertising over the last year.

Just over half (55%) of respondents believed that traffic calming measures make the roads safer, and one quarter of respondents believed that roads are safer than they were five years ago (23%) and that there are more police officers on the road nowadays (24%). Notwithstanding a dip on each measure in 2007, each of these measures has been fairly constant since 2006, with the exception of agreement that there are now more police officers on the road, which fell in 2011 from 30% in 2009.

One in five motorists agreed that they would be more likely to drive over the speed limit on rural roads because there are fewer vehicles and pedestrians around (22%) and because there is less police presence (20%). These levels remain consistent with 2009.

## **2.4 Attitudes towards driving**

The behaviours most highly rated as unacceptable were driving after taking drugs (98% for Class A drugs and 94% for cannabis), using a mobile phone while driving (98% for texting and 96% for using a mobile phone without a hands-free kit) and not wearing a seat belt in the front of a car (95%). By way of comparison, this is the same proportion as found shoplifting unacceptable. For all of these behaviours except driving after taking Class A drugs (which was universally felt to be unacceptable), motorists were more likely to hold this opinion than non motorists.

For the majority of behaviours, there was a picture of stability over time in how unacceptability was rated. Exceptions to this included driving when unsure if over the legal alcohol limit (up from 88% in 2009 to 90% in 2011), with a number of other changes taking place over a longer period of time (since 2008, rather than just in the last year). These were not wearing a seat belt in the front of a car (up from 92% in 2008 to 95% in 2011), not wearing a seat belt in the back of a car (up from 80% in 2008 to 85% in 2011) and driving at 40mph in a 30mph speed limit area (up from 68% in 2008 to 73% in 2011).

Over nine in ten respondents completely agreed that it is dangerous to drive after taking Class A drugs (92%) or when under the influence of alcohol (92%, up from 87% in 2008), making these the most highly rated dangerous behaviours. However, there were only slightly lower levels of complete agreement that driving after smoking cannabis (85%, up from 79% in 2008) and driving when unsure whether over the legal alcohol limit (84%) are dangerous.

Other behaviours with consistently high levels of complete agreement that they are dangerous were using a mobile phone to text while driving (89%), using a mobile phone without a hands-free kit while driving (85%), driving too fast for the conditions (85%) and not using a seat belt in the front of a car (83%). Complete agreement that each of these behaviours is dangerous has increased since 2008, with a relative stable picture prior to that. Complete agreement was higher among motorists than non motorists for each of these behaviours, as well as those relating to driving when under the influence of drugs and alcohol, with the exception of driving when unsure if over the legal alcohol limit where there was no difference between the two groups.

Young people aged 16-29 (especially men), black and minority ethnic respondents, those living in London and single people were consistently less likely than other groups to completely agree that each of the sixteen driving behaviours presented to them was dangerous.

Over half of motorists (56%) disagreed that they felt excluded when they were a designated driver on a night out. However, a significant minority (17%) agreed this was the case, and one in four (26%) agreed that they did not enjoy their night out as much when they were the designated driver. Only one in five motorists (20%) agreed that when they were on a night out venues encouraged them to avoid alcoholic drinks and almost half (44%) disagreed with this.

## 2.5 Road user behaviour

One in eight motorists (12%) admitted to driving without being sure if they are over the legal alcohol limit, but only four per cent have driven in the knowledge of being over the limit. Men under the age of 30 and single people were amongst the most likely groups to acknowledge either of these behaviours. Driving under the influence of cannabis was less common (2%), but still dominated by the same groups. Only one per cent of drivers said they have driven after taking Class A drugs.

Levels of drink driving and drug driving have not changed substantially since 2005. Despite this, more respondents in 2011 than ever before said they know people who have driven without being sure if they were over the legal alcohol limit (50%), or who have driven after exceeding the legal alcohol limit (31%) or after taking cannabis (13%).

More respondents reported speeding than driving under the influence of drink or drugs. Over a third of motorists (36%) agreed that they speed on clear country roads. Moreover, three fifths of motorists (60%) admitted to driving at 40mph in a 30mph area, just under half (45%) reported driving at 90mph on a motorway without traffic, and a third (34%) acknowledged that they sometimes drive too fast for the conditions. Driving at 90mph is the only behaviour whose frequency has risen significantly



between 2009 (40%) and 2011 (45%). In 2011, speeding in 30mph zones, on motorways, and in dangerous conditions were all believed to be widespread, with 73%, 78% and 64% of motorists, respectively, knowing at least a few people who have engaged in these behaviours. Levels of perceived prevalence of these behaviours were higher in 2011 than 2009.

Neither the reported prevalence, nor the perceived prevalence, of illegal mobile phone usage has risen since 2009, although there has been an increase in both the self-reported use and perceived use of mobile phones with hands-free kits. In 2011, three in ten motorists (28%) said that they used their mobile phones in their vehicle with a hands-free kit (up from around a quarter in previous years), while half that number acknowledged using a mobile without a hands-free kit (15%, down from 21% in 2006) or admitted to texting whilst driving (14%). Seven in ten motorists (71%) said they know at least a few people who used a mobile phone with a hands-free kit (up from 61% in the previous two years), while half (50%) claimed to know at least a few people who use a mobile phone without a hands-free kit and four in ten (41%) know people who text whilst driving.

This year saw a significant decrease in the proportion of motorists reporting that they do not use a seat belt in the back seat: the frequency fell to one in five (19%) after a period of three years of stability at around one in four. The proportion reporting that they do not use a seat belt in a front seat is lower, and continues to be stable at around one in ten (9% in 2011). Seat belt avoidance is twice as common amongst people that respondents know: 42% say they know people who avoid using seat belts in the back, and 23% know people who avoid them in the front. There has been no substantial change in these proportions over time.

Over four in ten drivers (45%) admitted to driving when tired, and almost as many (38%) acknowledged parking on double yellow lines. Compared to 2009, more motorists in 2011 reported driving when tired (up from 40% in 2009 to 45% in 2011), but the frequency of parking on double yellow lines has remained largely constant over the years. Both behaviours are common amongst some of the same groups: men below the age of 45; those who drive to and from work or who drive as part of their job; and those who drive more than 10,000 miles a year.

Only one in twenty motorists (5%) admitted to driving without a valid MOT certificate, and even fewer admitted to driving without insurance (2%). These frequencies are broadly in line with the frequency of 'driving without insurance/MOT', which was asked about in previous years. Future waves will show whether there is any substantial difference in the prevalence of these two behaviours.

When asked about driving penalties and alcohol breath tests, almost half of drivers (47%) reported that they had never received either. Motorists were most likely to have been penalised with points on a licence (35%) or a fine for speeding (31%). One in eight drivers (12%) had experience of being breathalysed, while less than one in twenty had received any of the other penalties. Men were almost twice as likely as women to have received a driving penalty of any sort.

Fifteen per cent of motorists reported receiving a driving related penalty in the last three years and three per cent had been breathalysed. The most common penalties received in the last three years were points on a licence or a fine for speeding (both reported by around one in ten motorists). This picture has hardly changed over time, though there has been a decrease in the proportion of motorists reporting that they received a fine for speeding in the last three years (down from 11% in 2009 to 8% in 2011).

## **2.6 Awareness of, and attitudes towards, the THINK! brand**

Recall of road safety advertising stands at four in ten (40%), a decrease from 48% in 2009, but in line with 2008 (39%), when there was a more reduced campaign schedule. The decrease in recall in 2011 can be attributed to a lack of THINK! activity for much of 2010, and greatly reduced activity at the beginning of 2011.

The proportion attributing road safety advertising to the Government rose dramatically to nearly one third of those aware of such advertising between 2007 and 2008, and this level has been maintained in 2011 (25%, although not significantly lower than previously). The proportion spontaneously mentioning THINK! with regards to who produced the advertising remains at around one fifth (19%), which is a consistent level over the last four surveys. The proportion who mentioned the Department for Transport as the sponsor of the advertising increased in 2011 to 15% (from 10% in 2009), while the proportion attributing it to the Police remained at the same level as previously (7%).

When prompted, over eight in ten said they had previously seen the THINK! logo (86%), which has increased steadily since 2008 (82%).

The THINK! brand personality is overwhelmingly viewed as positive, with "helpful" and "thought provoking" being the descriptions most commonly associated with the brand, with around half of those who recognise the logo choosing these terms. The term "influential" was chosen by around a third of respondents and "caring" chosen by around one quarter. No negative terms were chosen by more than 8%.

This report finds evidence of relatively high levels of risk taking behaviour and attitudes among young males, but it is encouraging to note that young males were more likely than other groups to describe THINK! as "influential" and "caring".

When asked to consider what type of person THINK! would be most like, three in ten (30%) felt it would be their conscience. Two in ten thought THINK! was most like a policeman or a policewoman while around one in ten thought it was like their mother or father, an expert or a teacher.

Three quarters of respondents said that they take notice when they see the THINK! logo, two thirds said that they trusted it and just over half believed that the campaign was making roads safer. The proportion who would take notice when seeing something with the THINK! logo on increased slightly in 2011, while the figures for the other attitudinal statements remained consistent with 2009 levels.

Half of respondents (49%) agreed that road safety advertising has a strong impact on how people behave on the roads. Just 8% believed that there was too much road safety advertising, a fall from 11% in 2009. This may reflect the lower levels of advertising recall due to lower levels of THINK! activity, but is also in line with the longer-term trend.

## 3. Road user profile

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This chapter profiles the survey respondents in terms of their motoring and other road usage status, the types of journeys that motorists make, distance that they drive and length of time they have been driving.

### 3.1 Types of road users

In order to identify groups of road users, and frequency of road usage, all respondents were asked how long, in a typical week, they spend doing the following (Chart 3a):

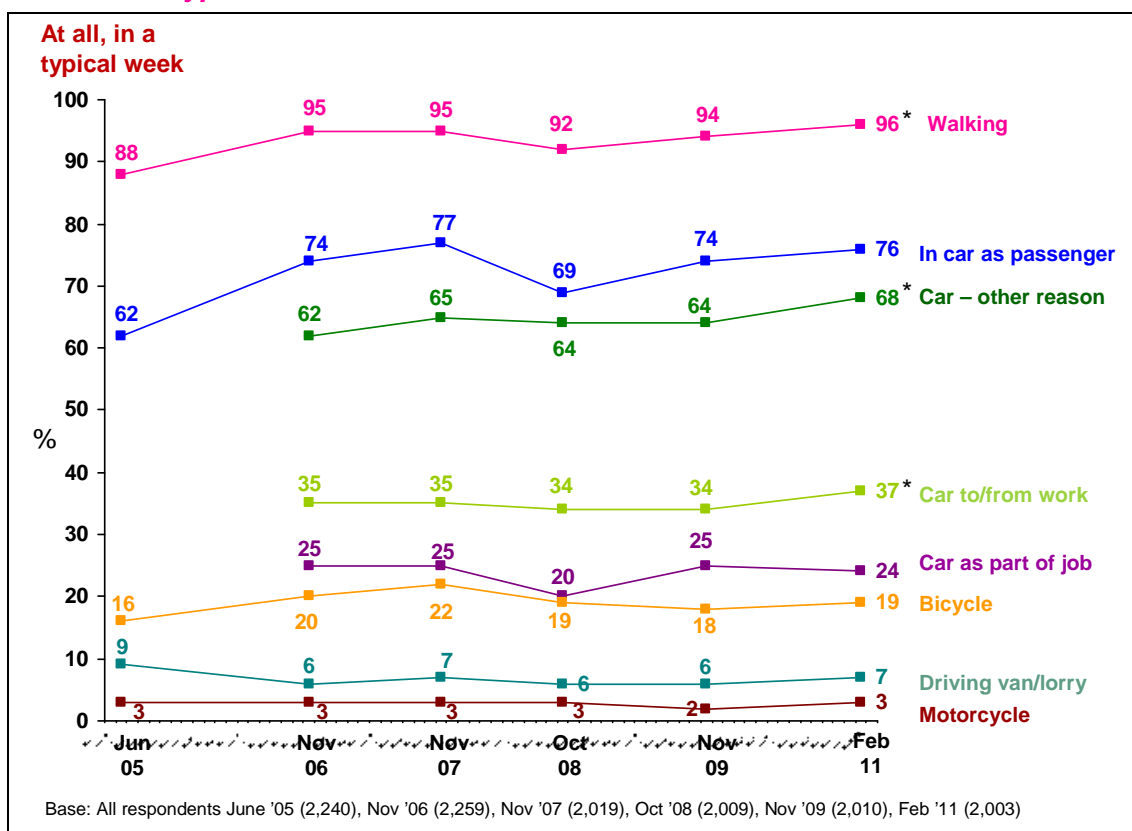
- Walking on the pavement or road
- Travelling in a car as a passenger
- Driving a car (either to and from work, as part of a job, or for other reasons)
- Riding a bicycle
- Driving a van or lorry
- Riding a motorcycle, scooter or moped

If necessary, people were asked to think about their experience in the last three months. For example, for those who only use a motorcycle in the summer (i.e. for whom there is not a typical week of usage), they would be asked to reference what they had done over the last three months in order to enable them to answer more accurately.

The question for the June 2005 wave differed slightly from the question for subsequent waves. In addition, respondents were asked only how often they drive a car in a typical week, rather than how often they drive a car for each of the three purposes asked about since then. Comparisons between the 2005 wave and more recent waves should therefore be treated with caution<sup>1</sup>.

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<sup>1</sup> See THINK! Annual Survey 2006 for an explanation of the difference.

**Chart 3a - Types of road users**

Levels of road usage per week have remained relatively stable over the years, with walking far ahead of other types of usage (96% in 2011). Car usage was also high, with three quarters (76%) riding as passengers and seven in ten (68%) driving for non work-related reasons, but lower proportions using a car to get to and from work (37%) or as part of their job (24%). The proportion of adults who used other means of transport was relatively low: one fifth (19%) rode bicycles, seven per cent drove a van or lorry, and only three per cent rode motorcycles, scooters or mopeds.

All vehicular modes of transport were predominantly used by men, with twice as many men (26%) as women (13%) cycling, and men more likely than women to drive a car, van or lorry at all (75%, compared with 63% of women) or ride a motorcycle (5%, compared with 1% of women). There were also differences in road usage by social grade and age (Table 3b).

**Table 3b – Differences in road usage by social grade and age**

	Social Grade		Age		
	ABC1 (996) %	C2DE (1007) %	16-29 (347) %	30-54 (905) %	55+ (751) %
Driving a car as part of my job	29*	18	17	38 <sup>†</sup>	12
Driving a car to and from work	42*	29	32	55 <sup>†</sup>	17
Driving a car for other reasons	77*	56	47 <sup>†</sup>	78	68
Driving a van/lorry	6*	9	4	12 <sup>†</sup>	4
Riding a motorcycle/scooter/moped	3	3	4	3	2 <sup>†</sup>
Riding a bicycle	79	82	21	24	12 <sup>†</sup>
Travelling in a car as a passenger	78*	74	81 <sup>†</sup>	75	75
Walking on the pavement/road	97*	95	98	97	93 <sup>†</sup>

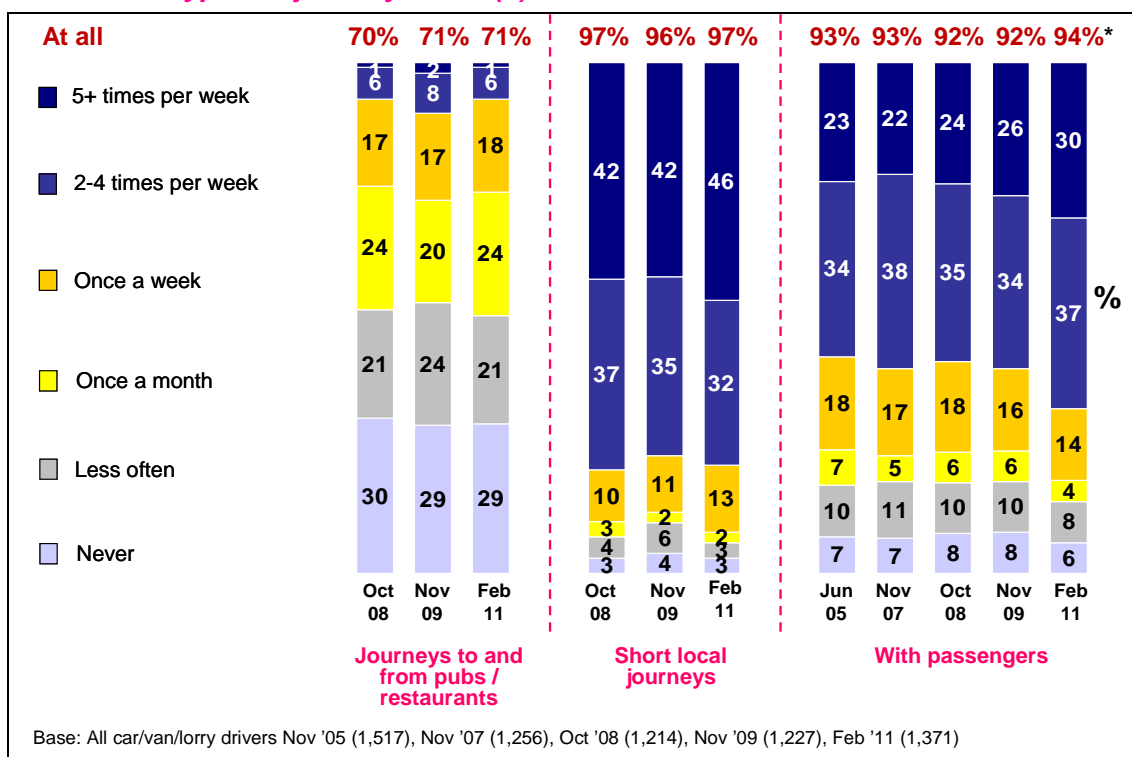
\*Significantly different to C2DEs    †Significantly different to other age groups

The upward trend over time in the proportion driving a car for non work-related reasons continued this year, reaching its highest level so far (up from 62% in 2006 to 68% in 2011). This year also saw a rise in the proportion of respondents walking (from 94% in 2009 to 96% in 2011), and, for the first time since the measure was first recorded, travelling to and from work by car (up from 34% in 2009 to 37% in 2011). Amongst all other modes of vehicular transport, usage levels remained unchanged since the last wave.

### 3.2 Types of journey made

Car, van and lorry drivers were asked a series of 'frequency of journey' questions designed to measure how often they go on various sorts of journeys. This measure was not used in the November 2006 survey but has been included in all other years.

The frequency of journeys to pubs and restaurants, short local journeys, and journeys with passengers is shown in Chart 3c.

**Chart 3c - Types of journey made (1)**

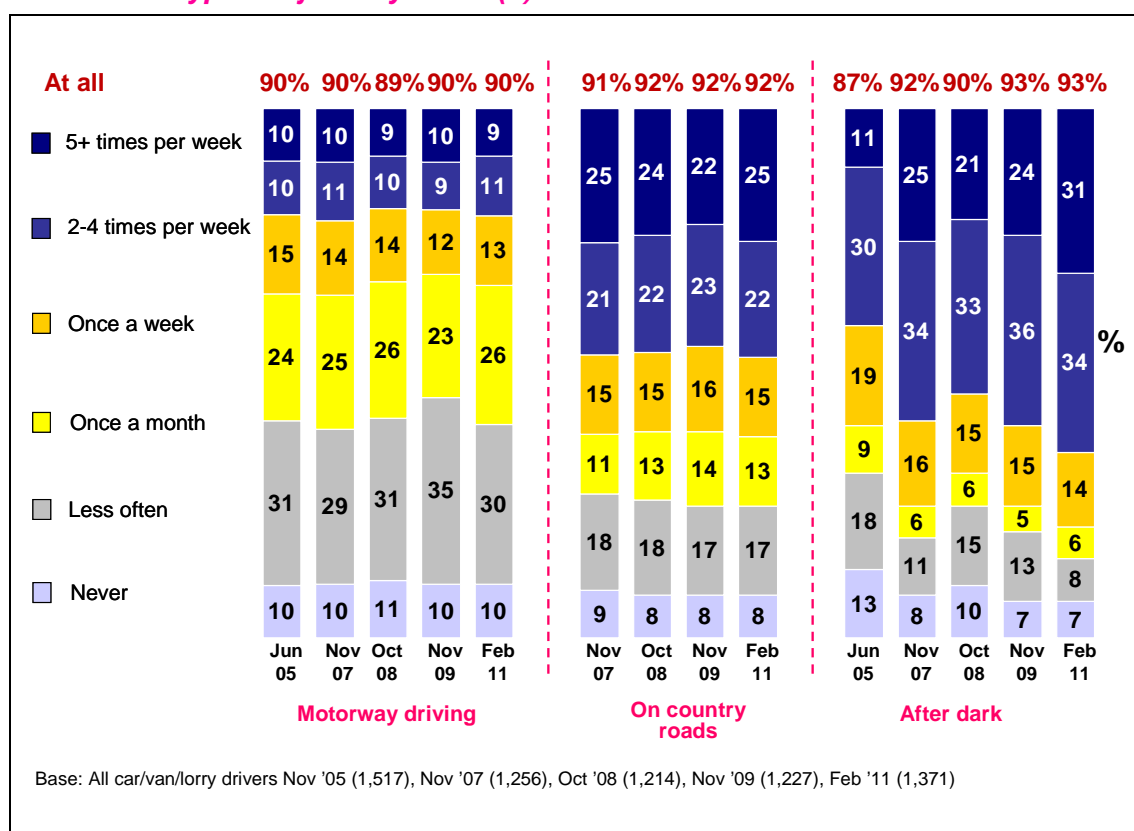
Seven in ten drivers (71%) made journeys to pubs and restaurants. This has remained stable since 2008 when the question was first introduced, as has the fact that only a minority (7% in 2011) make such journeys more often than once a week. Driving to a pub or restaurant was more common amongst ABC1s (75%) than C2DEs (64%), and least common amongst those living in Scotland (56%, compared with 71% overall). Men aged 55 or above had a greater propensity (12%) than the average driver (7%) to make such a trip more than once a week.

As in previous years, short local journeys by motor vehicle were made by almost all drivers (97%), with around half (46%) making a trip of this kind five or more times per week. Such a high frequency was more common amongst women (50%, compared with 43% of men) and those with children in the household (51%, compared with 44% of those with no children).

Journeys with passengers were made by over nine in ten drivers (94%), more than in either 2008 or 2009 (92%). There has also been a longer term increase in the proportion who drive with a passenger on at least five occasions per week (up from 22% in 2007 to 30% in 2011). Female drivers (33%) and drivers below the age of 45 (38%) were the two groups most likely to make a journey with passengers on five or more occasions per week (compared with 28% of men, and 24% of drivers aged 45 or above).

Chart 3d shows the frequency of three more types of journey, all of which were made by around nine in ten drivers.

**Chart 3d - Types of journey made (2)**



The great majority of drivers drive on motorways (90%), though men (93%) and ABC1s (93%) are more likely than other drivers to do so. A third of drivers use motorways on a weekly basis or more (9% five or more times a week, 11% between two and four times a week, and 13% just once a week), rising to almost half (48%) of males aged 30-54. Frequency of motorway driving has not changed significantly since its measurement on the survey began in 2005. The rise observed in 2009 in the proportion who make the occasional motorway journey (less often than once a month) returned this year to its previous level of three in ten.

Just over nine in ten drivers (92%) reported driving on country roads, with six in ten (62%) doing so at least once a week. Not surprisingly, those living in London were the least likely to have made any journeys on country roads (84%).

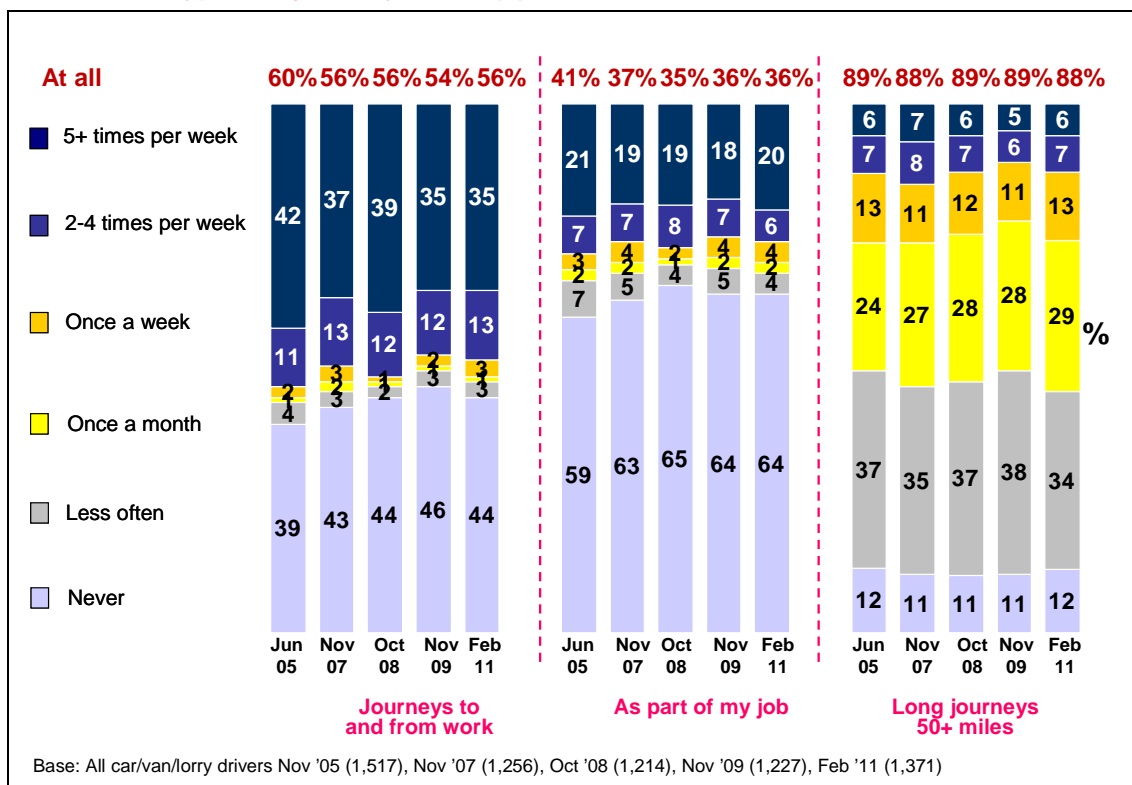
As in previous years, just over nine in ten drivers (93%) reported making journeys after dark. The slightly lower figure observed in 2005 (87%) was almost certainly caused by the timing of the survey, in June with its lighter evenings, whereas subsequent measures have been taken in the winter. In 2011 the proportion who



made a journey in the dark on five or more occasions per week reached thirty-one per cent, up from previous years when it fluctuated at a level beneath one in four.

The frequency of work-related road journeys and long journeys (of 50 or more miles) is illustrated in Chart 3e.

**Chart 3e - Types of journey made (3)**



Journeys to and from work were undertaken by fifty-six per cent of drivers in 2011. This is consistent with levels recorded from 2007 onwards, when the survey was conducted in the winter rather than spring. Half of all drivers (52%) drive to or from their work at least once a week, with over a third (35%) making this journey on five occasions or more per week. Men aged between 16 and 54 were the most likely to drive to and from work on a weekly basis (73%, compared with 52% overall), reflecting the higher employment rates within this demographic group.

Just over a third of drivers (36%) reported making journeys by motor vehicle as part of their job. Over half (55%) of the drivers who made such journeys – the equivalent of a fifth of all drivers (20%) – did so at least five times a week, a proportion that has remain unchanged since 2005, and which is led by C2DEs (26% of whom drive for their work five or more times per week, compared with 16% of ABC1s).

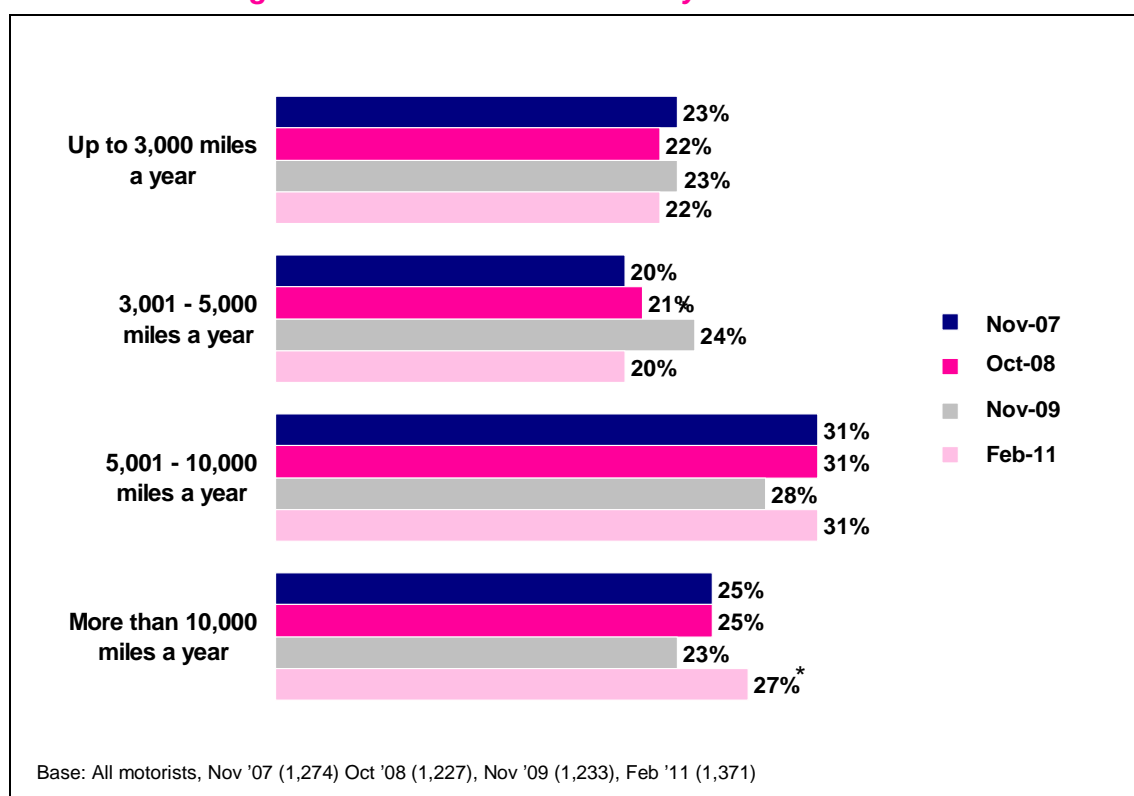
Long journeys by motor vehicle (defined as 50 miles or more) were made by around nine in ten drivers (88%), a proportion almost identical to previous years. Compared

to the average driver, men aged 30-54 were more likely to make long journeys (94%), while drivers living in Wales were less likely to do so (80%). The frequency with which long journeys was undertaken was fairly low, averaging once a month or less for the majority of drivers (62%). Long journeys were undertaken five or more times per week by only a quarter of drivers (25%), though this level of frequency was more common amongst people who drive as part of their job (40%).

### 3.3 Distance driven and length of time driving

Respondents who drive any motorised vehicle were asked how many miles they drive in a year, including both personal and work-related driving. The results from 2011 and previous years are shown in Chart 3f.

**Chart 3f – Average number of miles driven in a year**



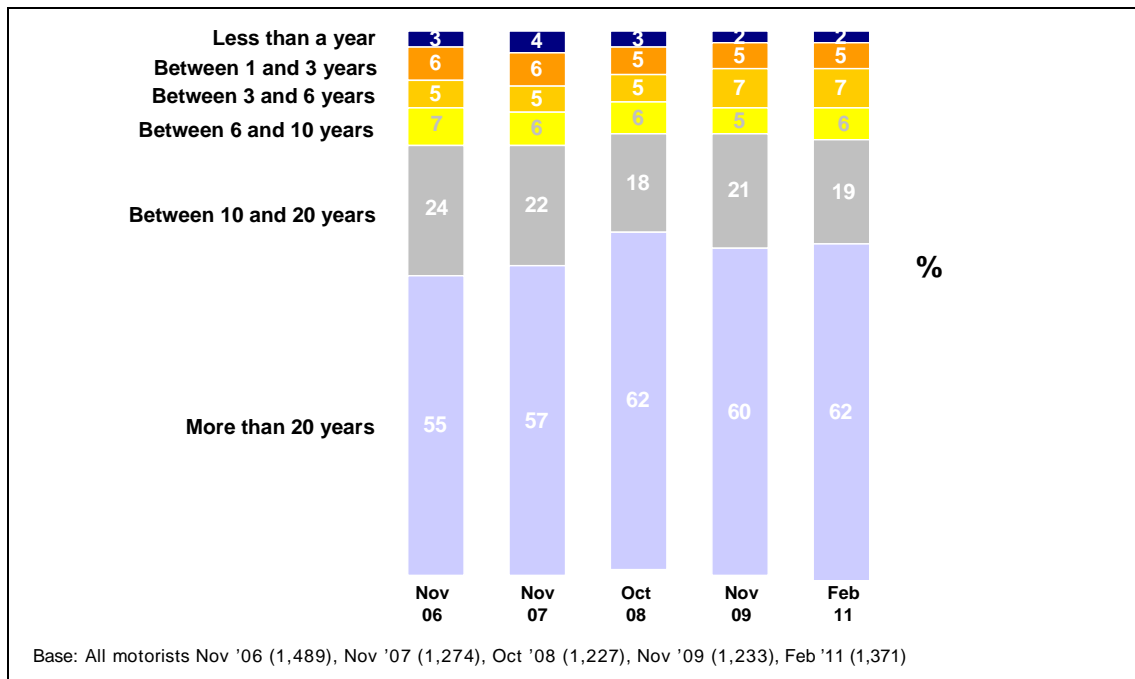
In 2011, three fifths of drivers of cars, vans, lorries or motorcycles reported driving over 5,000 miles a year. This proportion has increased since 2009 (from 51% to 58%) reflecting a rise in the proportion who drive over 10,000 miles (up from 23% to 27%). The remaining respondents were split equally between those who drove between 3,001 and 5,000 miles a year (20%, a return to pre-2009 levels), and those who drove less than this (22%, stable since 2007),

Men aged 30-54 (51%) and those who drove for work (48%) were more likely than anyone else to have driven 10,000 miles or more per year, whereas drivers with

three years or less of driving experience were more likely than anyone else to have the lowest mileage (40% under 3,000 miles per year, compared with 22% overall).

All drivers were asked how long they have been driving for, as a way of measuring their driving experience (Chart 3g). This has remained relatively stable over the years it has been tracked and largely correlates with age of respondent.

**Chart 3g – Length of time driving**



Six in ten drivers (62%) have been driving for over 20 years. Male motorists and motorists in social grade ABC1 are more likely to fall into this highly experienced group (65% men compared with 57% women, and 64% ABC1s compared with 58% C2DEs).

## 4. Attitudes towards road safety

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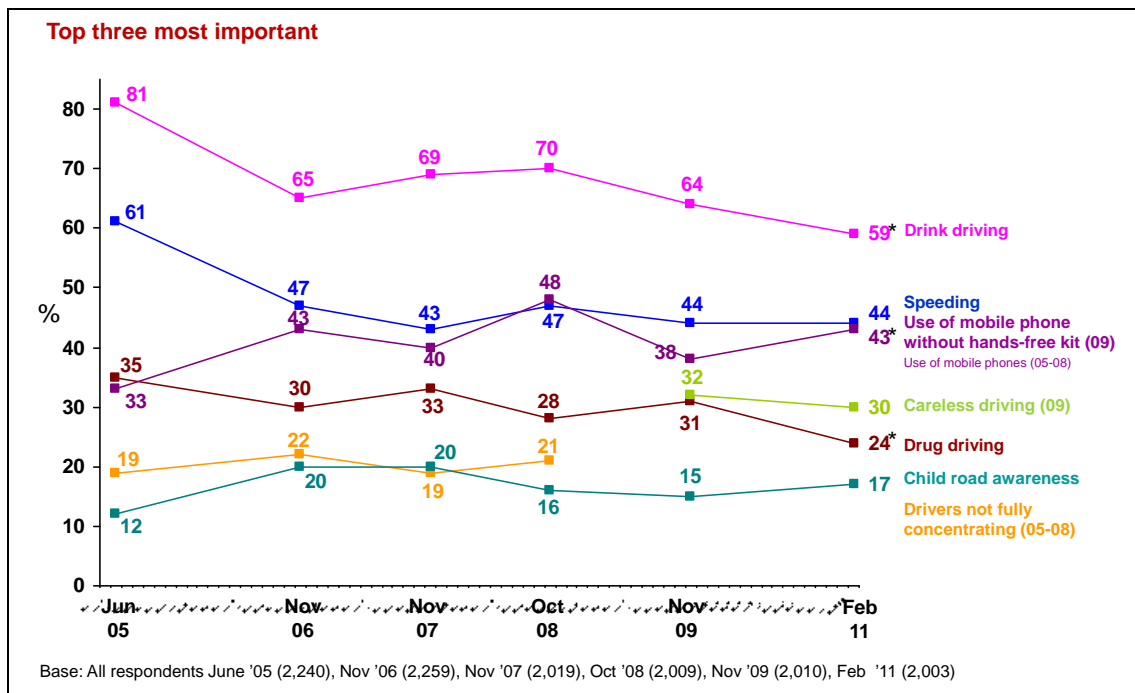
This chapter first of all looks specifically at which road safety issues were felt to be most important and what has the most effective influence on safe driving. It then goes on to explore attitudes towards road safety.

### 4.1 Most important road safety issues

To look at attitudes towards road safety in more detail, all respondents were asked to choose from a list the three most important road safety issues which they felt that the Government should address (Charts 4a and 4b). This has been asked since 2005, but tailgating and road rage were added in 2006. Since the question asks people to specify their top three choices, the introduction of two new, additional options on the 2006 survey caused a decline in the proportion specifying a number of issues, simply because there were more issues to choose from, but still only three choices are available. For this reason, analysis in the commentary below focuses on trends since 2006.

It is also important to note some further changes to this section of the questionnaire in 2009 and 2011.

- In 2009 'Use of mobile phones' was split into two categories, namely 'use of mobile phones with a hands-free kit' and 'use of mobile phones without a hands-free kit'. This represents a very different way of asking respondents about mobile phone usage, and has been treated as completely new questions. By splitting this category into two, we created an additional option whilst leaving the number of permitted answers at three, and this may be the reason for some slight reductions in the proportions mentioning each of the other issues seen in 2009.
- The category 'drivers not fully concentrating' was replaced by 'careless driving' in the 2009 survey. This is a subtle change of wording around the same concept, and reference has been made to previous data based on the old terminology, but with a note advising caution due to the likely small, but possibly significant change attributable to the new wording.
- In 2011 'Cycling safety' was added to the list of issues. The inclusion of an additional option whilst leaving the number of permitted answers at three, may again lead to reductions in the proportions seen for other issues due to there being more issues to choose from. Therefore any decreases should be treated with caution.

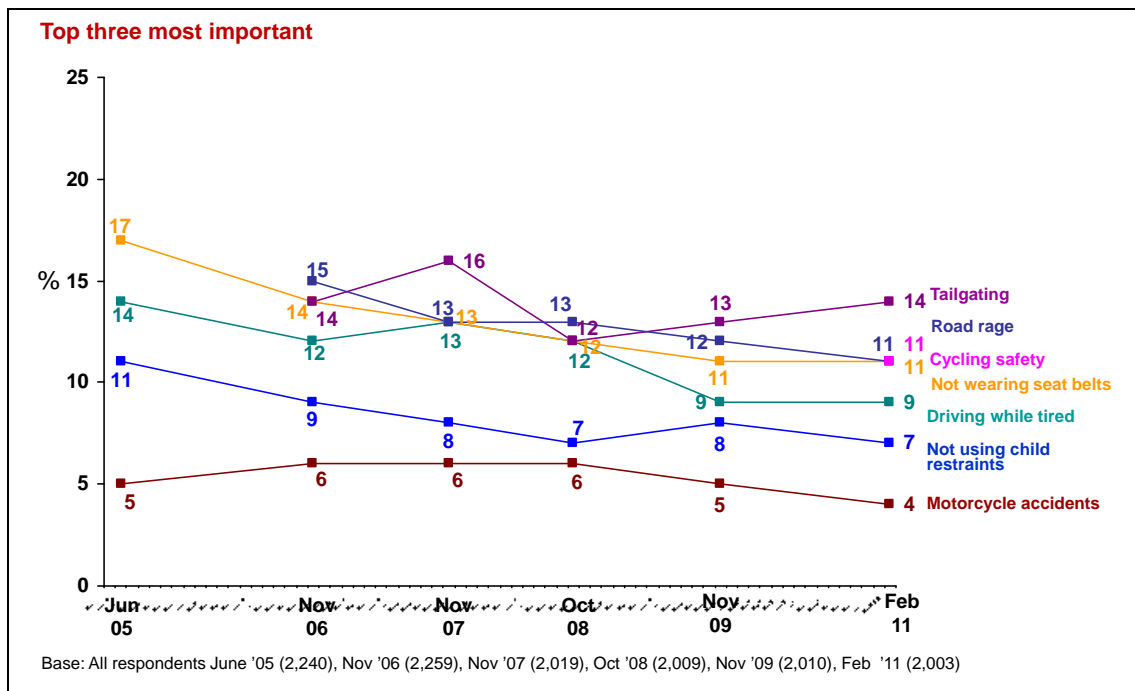
**Chart 4a – Top three road safety issues most important to address (1)**

The issues most commonly cited within the top three most important have been consistent since 2005, topped by drink-driving, although this fell again in 2011 to 59% (compared with 70% in 2008 and 64% in 2009). This issue was more salient for people in lower social economic groups (63% of C2DEs picked this as a top three issue, compared with 56% of ABC1s).

Drink-driving was followed by speeding (44%) and using mobile phones without a hands-free kit (43%). These two issues have consistently been mentioned by between four and five in ten respondents over recent years, with greater fluctuation year on year for use of mobile phones without hands-free: although a significant increase between 2009 and 2011, this is in keeping with typical proportions since 2006.

Below this comes careless driving (a stable three in ten since 2009), drug driving (24%, down from three in ten in previous years) and child road awareness (17%, in line with the previous two years, but a little less salient than in 2006 and 2007 when 20% considered it a top three issue).

Chart 4b shows the remaining issues from this question, which were regarded as top three concerns for a smaller proportion of respondents.

**Chart 4b – Top three road safety issues most important to address (2)**

Of the remaining issues, none was considered in the top three by more than fourteen per cent of people. A brief summary is provided below, for each of these remaining issues.

Tailgating was specified in the top three issues by 14% in 2011, within a fairly narrow range observed at previous surveys (between 12% and 16%).

In 2011, one in ten people considered road rage and not wearing a seat belt as top three issues. Road rage was cited by 11%, a decline from a peak of 15% in 2006. Not wearing a seat belt has declined steadily from its peak of 17% in 2005, with only 11% regarding this as a top three safety issue in 2011.

Cycling safety was also considered a top three issue by one in ten respondents (11%). Cycling safety was included in the question for the first time in 2011, so it is possible that this is the cause of a decrease in proportions for other issues such as drink driving and drug driving.

Driver tiredness has also declined in perceived importance, from 14% thinking it is a top three issue in 2005 to just 9% in 2009 and 2011. Only seven per cent of respondents cited not using child restraints as a top three issue in 2011. This has been stable since 2007, but is down from the peak of 11% recorded in 2005.

Motorcycle accidents were considered a top three issue by just four per cent of respondents in 2011. This figure has not changed significantly across the six annual

surveys conducted so far. Not surprisingly the group most likely to mention this were motorcyclists, a quarter of whom cited motorcycle accidents as one of their top three issues (24%).

Higher proportions of women than men thought speeding, child road awareness and not using child restraints to be top three issues, while cycling safety and motorcycle accidents were more important issues for men. Respondents aged 30 or over were more likely to consider use of mobile phones without a hands free kit and tailgating to be in the top three issues to address whereas younger respondents were more likely to think of not wearing seat belts as an important issue.

Table 4c shows how motorists and non motorists rated different road safety issues as being the top three most important for the Government to address.

**Table 4c – Top three road safety issues most important to address (motorists vs. non motorists)**

	Nov 07		Oct 08		Nov 09		Jan/Feb 11	
	Motorist (1,274) %	Non Motorist (745) %	Motorist (1,227) %	Non Motorist (782) %	Motorist (1,233) %	Non Motorist (777) %	Motorist (1,371) %	Non Motorist (632) %
Drink driving	69	69	67	75	61	71	58	61
Use of mobile phones without hands free kit	n/a	n/a	n/a	n/a	41	31	46	35
Speeding	41	49	43	53	39	54	42	49
Careless driving	n/a	n/a	n/a	n/a	33	30	31	28
Drug driving	35	29	28	29	31	30	24	23
Tailgating	20	8	17	4	17	5	18	5
Child road awareness	18	25	14	21	13	19	17	19
Cycling safety	n/a	n/a	n/a	n/a	n/a	n/a	11	11
Road rage	12	14	13	12	13	11	10	13
Not wearing seat belts	11	18	11	15	10	14	10	15
Driving while tired	13	14	13	11	9	11	8	11
Not using child restraints	8	9	8	6	9	7	7	7
Use of mobile phones with a hands free kit	n/a	n/a	n/a	n/a	9	9	7	9
Motorcycle accidents	6	7	5	7	6	4	5	4

Some interesting patterns are notable when we compare the top three mentions of motorists and non motorists. Some issues are more likely to be in the motorists' top three, whilst others are more likely to be in the non motorists' top three.

Motorists were more likely than non motorists to mention mobile phone use without a hands free kit and particularly tailgating as top three risks. Non motorists were more likely than motorists to mention speeding, not wearing seat belts and driving while tired. Part of the explanation for this might lie in the fact that the issues more commonly mentioned by non motorists have been the subject of major mass media campaigns. The difference in emphasis may therefore lie in the fact that non motorists have less personal experience, and therefore focus more specifically on what they have learned from campaigns, as well as being the issues most likely to affect them personally.

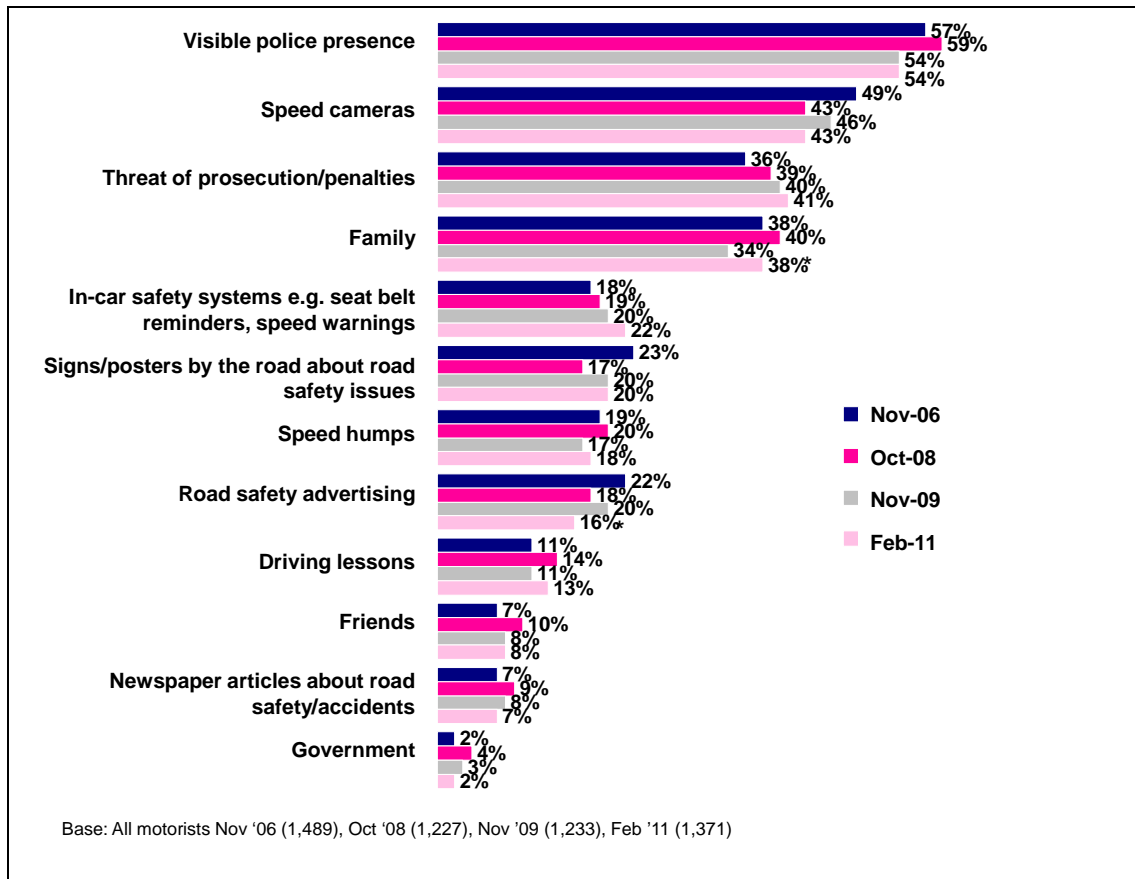
Mentions of drink driving as an issue to address varied according to driving experience. Seven in ten motorists (68%) with up to six years of driving experience mentioned drink driving, falling to 56% of those with more than 20 years of driving experience.

There was no consistent difference between motorists and non motorists in terms of drink driving, careless driving, drug driving, child road awareness, road rage, not using child restraints, use of mobile phones with hands free or motorcycle accidents.

## **4.2 Influences on safe driving**

Motorists need to take personal responsibility when it comes to driving safely, but there are many factors which can influence this. Motorists were asked to choose, from a prompted list, which they felt were the top three most effective means in influencing how safely they drove. Note that this question was not asked in 2007.



**Chart 4d – Top three most effective in influencing how safely you drive**

The general pattern for this data is one of consistency, with the proportion mentioning each influence remaining relatively stable over the four surveys, and very little movement observed in the ranking.

A visible police presence has been perceived as the most effective influence on all waves of the annual survey. In 2011 this was mentioned in the top three by 54%, down slightly on the figures of 57% and 59% recorded in 2006 and 2008 respectively but consistent with the 2009 figure. Men (59%) were more likely to be affected by a visible police presence than women (48%).

The next most effective influence was speed cameras, mentioned by 43% in 2011. The threat of prosecution/penalties was mentioned in the top three by 41% of motorists in 2011. Over the last four surveys this influence has been rated in the top three by between 36% and 41% of motorists. The influence of family fell in 2009, down to 34% from a peak of 40% in 2008. However, in 2011, this recovered to previous levels (38%).

The following influences were mentioned by one in five motorists as one of their top three influences in the last three surveys. Percentages for 2011 shown in brackets as follows: in car safety systems (22%), signs/posters about road safety (20%) speed

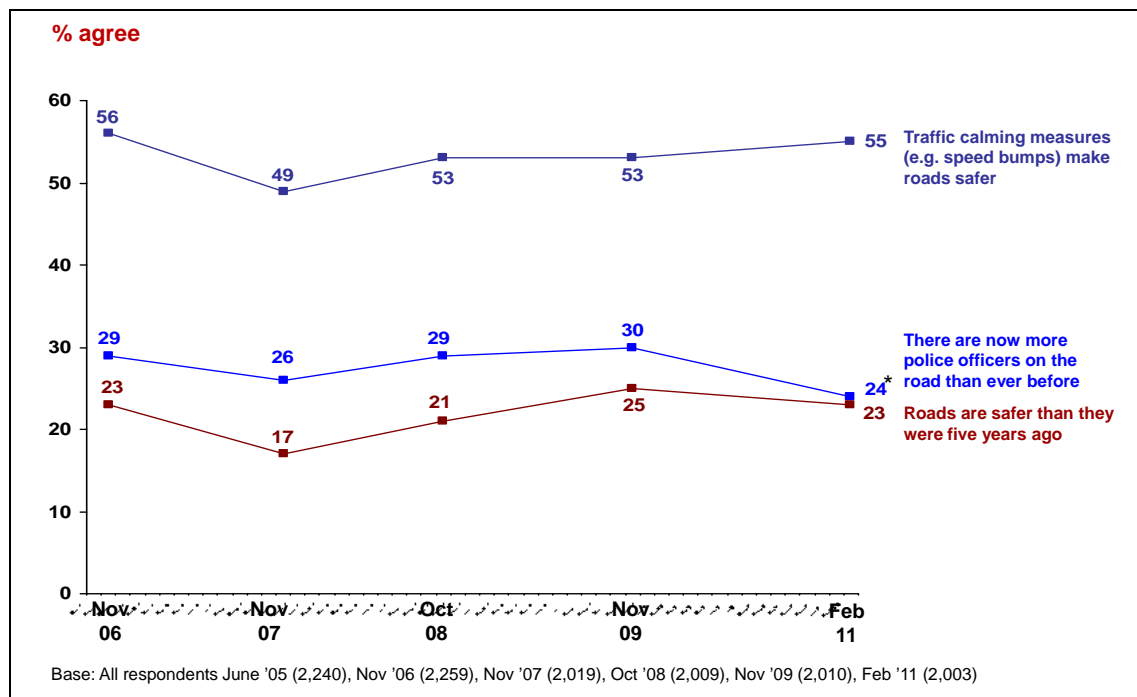
humps (18%). Road safety advertising had previously been mentioned by one in five, but has fallen to 16% in 2011. This reflects lower levels of road safety advertising over the last year.

Younger motorists, under the age of 30, were more influenced by their driving test (18%, compared with 13% of all motorists) and by friends (16%, compared with 8% of all motorists).

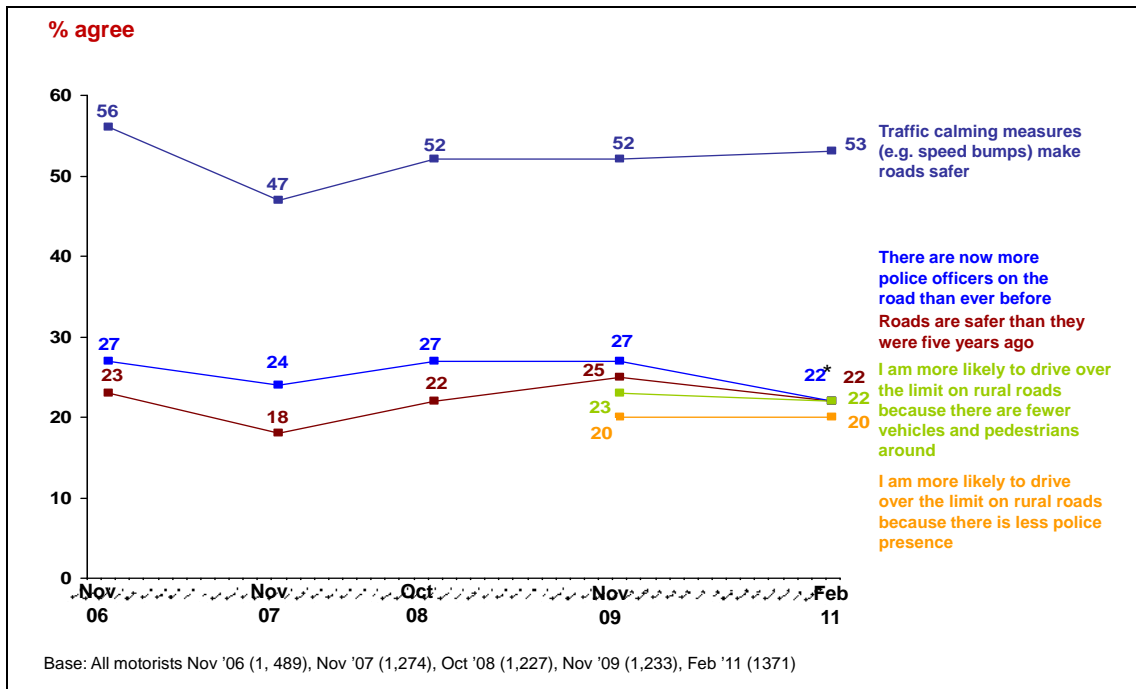
### 4.3 Attitudes towards road safety

A series of statements were used to assess how people feel about road safety and measures taken to make the roads safer. These cover perceptions of the safety of roads now compared with five years ago, whether people believe there is a greater police presence on the roads, whether traffic calming measures are felt to have an impact on road safety and likelihood of driving over the speed limit on rural roads. The following charts show agreement with these statements among all respondents (Chart 4e), all motorists (Chart 4f) and all non motorists (Chart 4g).

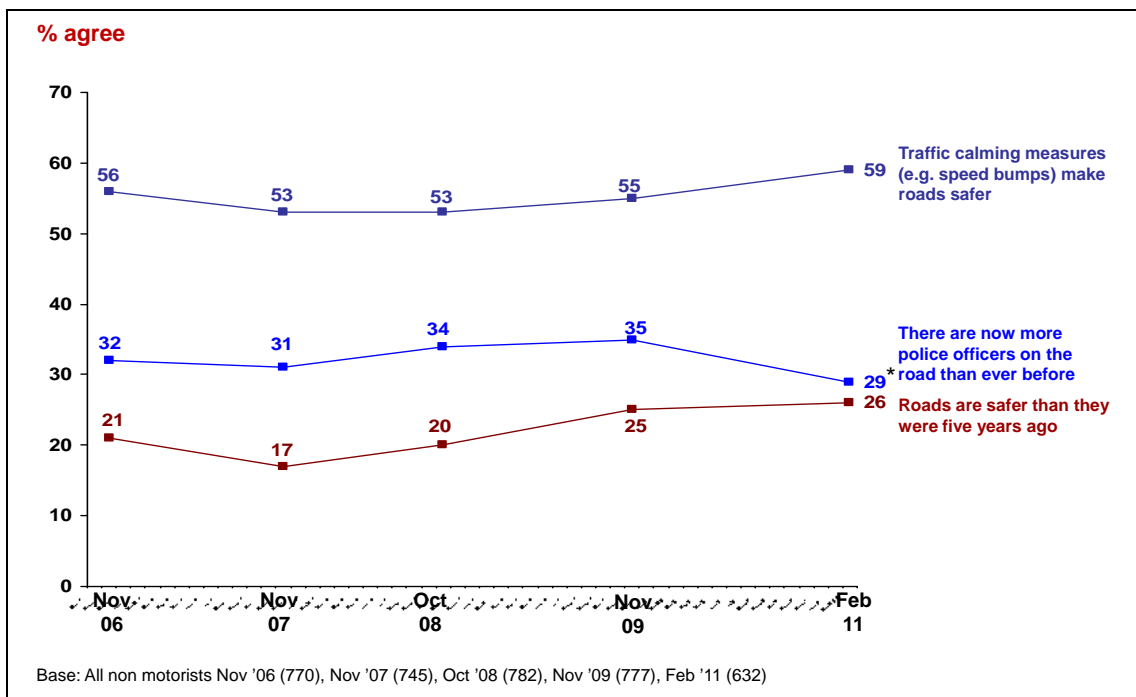
**Chart 4e – Agreement with statements about road safety (all respondents)**



**Chart 4f – Agreement with statements about road safety (all motorists)**



**Chart 4g – Agreement with statements about road safety (all non motorists)**



All measures that were tracked from 2006 followed a similar pattern (common to motorists and non motorists) in that they dipped slightly between 2006 and 2007, recovered in 2008 and maintained this level in 2009 and 2011. The exception is agreement that there are now more police officers on the road, which fell in 2011 (24% of all respondents, compared with 30% in 2009).

In each Annual Survey, non motorists were more likely to agree that there are now more police officers on the road than motorists, and this was again the case in 2011 (29% of non motorists compared with 22% of motorists). Younger respondents were also more likely to agree with this (41% of 16-29s), as were those for lower social grades (29% of C2DEs) and those from minority ethnic groups (43%). Motorists with over 20 years driving experience were less likely to agree that this is the case (16%) than those with less experience (40% of those with less than 10 years experience agreed).

For the statement 'roads are safer than they were five years ago' the level of agreement has remained steady (23%) following a slight increase in 2009. Groups more likely to think this were men (30%) and those from minority ethnic groups (41%), while less experienced motorists (14% of those with under three years driving experience) and those who drove smaller distances in a year (16% of those driving under 3,000 miles) were less likely to agree.

The proportion agreeing that traffic calming measures make roads safer (55%) is at a similar level to that found in 2008 and 2009. Previously, although there was no significant difference in the proportions of motorists and non motorists agreeing with the statement there was a difference in levels of disagreement. However, in 2011 there was a significant difference in agreement between motorists (53%) and non motorists (59%), with non motorists more likely to think that traffic calming measures make roads safer than in previous years (53% in 2008). Motorists with less than three years experience (68%) were more likely to agree.

Younger respondents were more likely to agree that traffic calming measures make roads safer (59% of 16-29s compared with 51% of those aged 55+).

One in five motorists agreed that they would be more likely to drive over the limit on rural roads because there are fewer vehicles and pedestrians around (22%) and because there is less police presence (20%). This shows no change from when this question was first asked in 2009. Men were more likely than women to agree with both of these statements, particularly young men aged 16 to 29.

## 5. Attitudes towards driving

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Following our examination of general attitudes towards road safety, this section looks more specifically at attitudes towards driving – first looking at the perceived acceptability of certain driving and non-driving behaviours, then at attitudes towards dangerous driving behaviours and finally some new questions around how motorists feel about being a designated driver.

### 5.1 Acceptability of behaviours

Respondents were read a list of sixteen types of (negative) behaviour; fourteen were driving related behaviours while the remaining two were non-driving related, which were asked to provide context. For each of the behaviours, respondents were asked to rate the extent to which they thought it was unacceptable or acceptable (where 1 was 'fairly acceptable' and 5 was 'extremely unacceptable'). Some of these statements appeared in the 2005 survey, so data amongst all respondents are provided for comparison where applicable (this is not available split out into motorists and non motorists). This question was not asked in 2006, but has been asked every year since 2007.

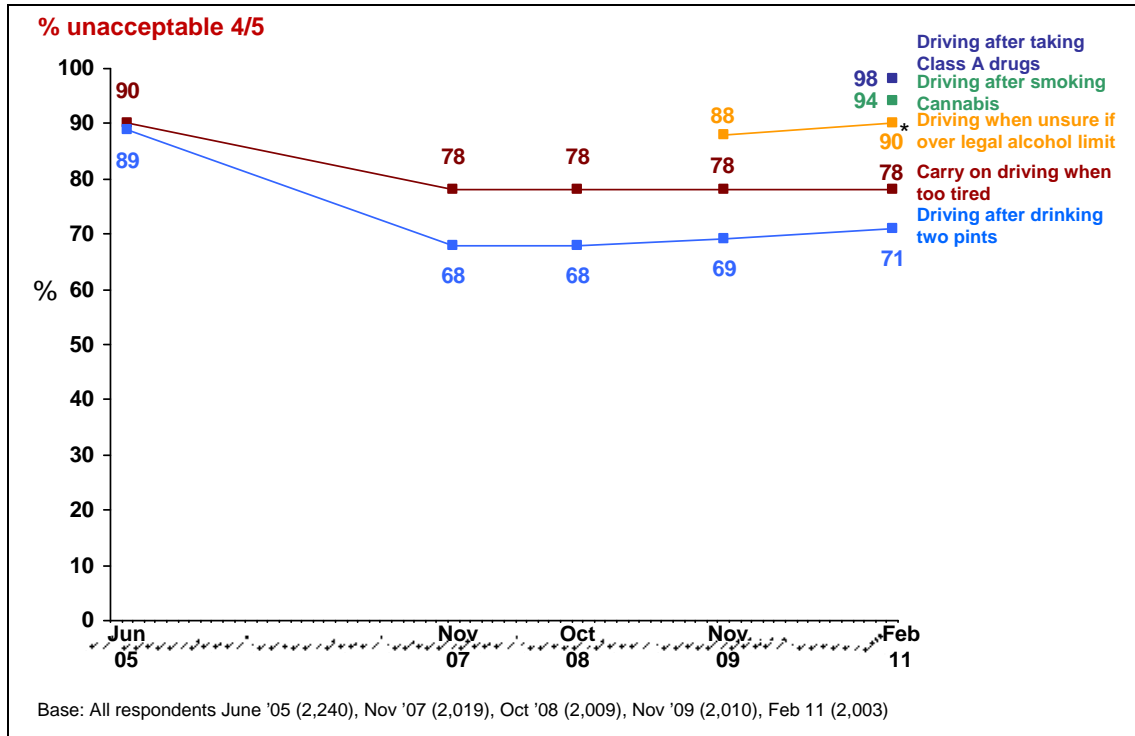
In 2011, some changes were made to the list of behaviours. These can be summarised as follows:

- 'Driving after taking drugs' has been split into two categories; 'driving after taking Class A drugs' and 'driving after smoking Cannabis'
- 'Using a mobile phone whilst driving' has been split into three categories; 'using mobile phones while driving without a hands-free kit', 'using mobile phones while driving with a hands-free kit' and 'using a mobile phone to text whilst driving'
- 'Driving without motor insurance / MOT' has been split into two categories; 'driving without motor insurance' and 'driving without a valid MOT certificate'
- 'Not buying a licence for your television', which was previously used for context, has been removed

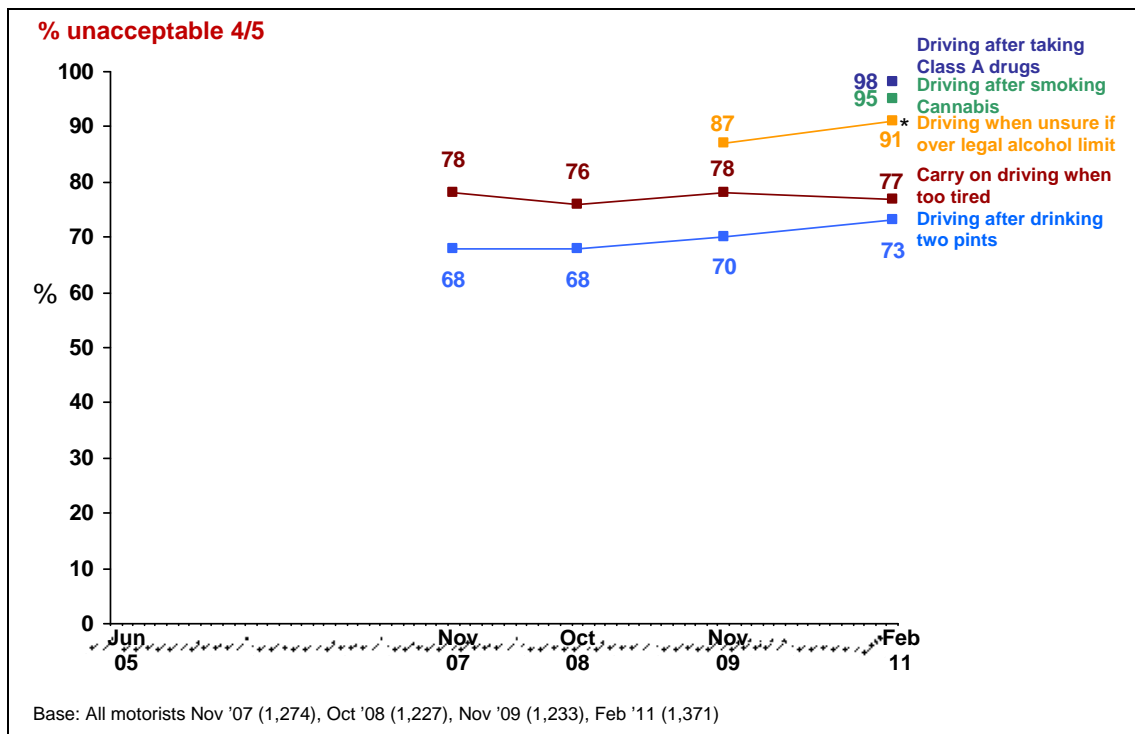
These changes represent a very different way of asking about driving after taking drugs and driving while using a mobile phone, and will therefore be treated as completely new questions, although previous data on these behaviours will be referenced to provide context.

The following charts show the percentage of adults (Chart 5a), motorists (Chart 5b) and non motorists (Chart 5c) who gave a score of 4 or 5 on the 5-point scale (5 being extremely unacceptable) for behaviours relating to driving under the influence of alcohol or drugs and carrying on driving when too tired.

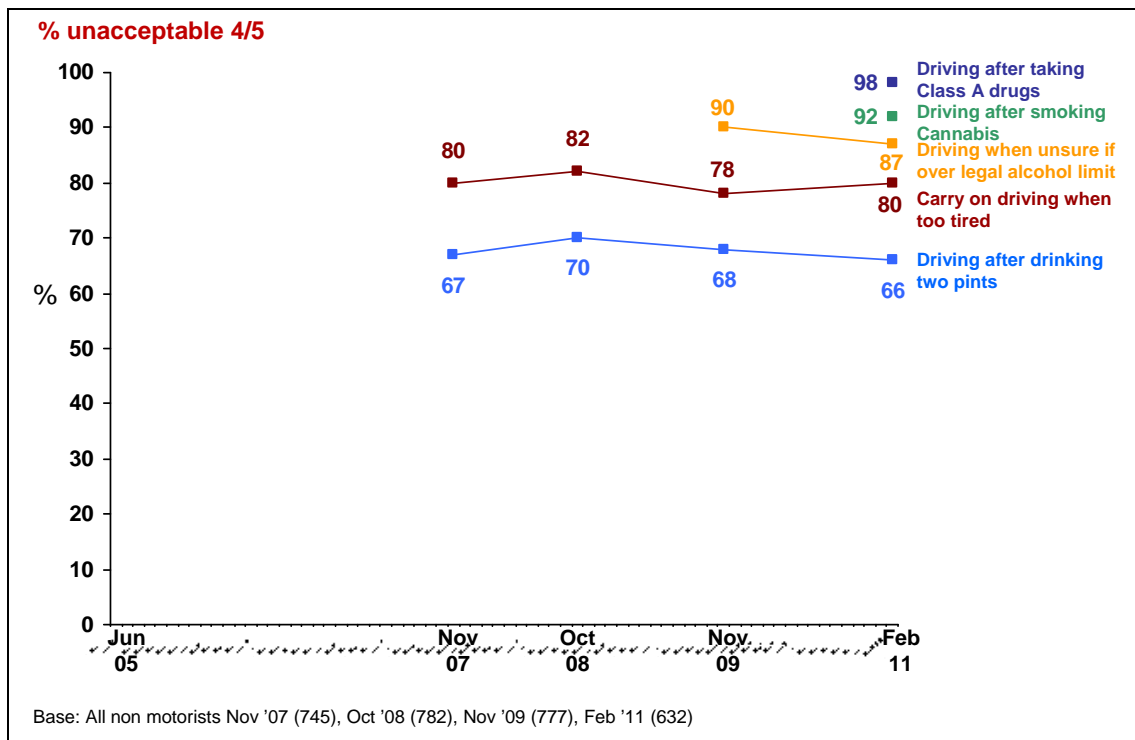
**Chart 5a – Extent to which think behaviours are unacceptable: driving while under the influence of alcohol/drugs and driving while tired (all respondents)**



**Chart 5b – Extent to which think behaviours are unacceptable: driving while under the influence of alcohol/drugs and driving while tired (all motorists)**



**Chart 5c – Extent to which think behaviours are unacceptable: driving while under the influence of alcohol/drugs and driving while tired (all non motorists)**



The overall picture across these issues is one of remarkable stability, year on year, although there are some small, but nonetheless significant, differences between motorists and non motorists.

The issue on which respondents felt most strongly was driving after taking drugs, with driving after taking Class A drugs deemed to be unacceptable (a score of 4 or 5 out of 5) by slightly more respondents than driving after smoking cannabis (98% and 94% respectively). There was however a greater difference in the proportion rating each of these as extremely unacceptable (scoring 5 out of 5): 94% for driving after smoking Class A drugs and 85% for driving after smoking cannabis. In 2009, when particular types of drugs were not specified, 96% of respondents rated driving after taking drugs as either 4 or 5 out of 5 in terms of unacceptability and 88% rated this as extremely unacceptable.

Motorists were more likely than non motorists to consider driving after smoking cannabis to be unacceptable (95% compared with 92%). There was no difference between the two groups in terms of how they rated driving after taking Class A drugs at the overall level, although motorists were more likely to find this extremely unacceptable (95% of motorists scored this 5 out of 5 compared with 91% of non motorists).

Nine in ten (90%) respondents felt it was unacceptable to drive when unsure if over the legal alcohol limit; an increase from 88% in 2009. This was higher among motorists than non motorists (91% compared with 87%), with an increase from 87% of motorists in 2009. Driving when unsure if over the alcohol limit was deemed to be unacceptable for a higher proportion than driving after two pints (71%). This may suggest that, for some people at least, drinking two pints is felt to be within the legal alcohol limit. Motorists (73%) were more likely than non motorists (66%) to consider it unacceptable to drive after drinking two pints.

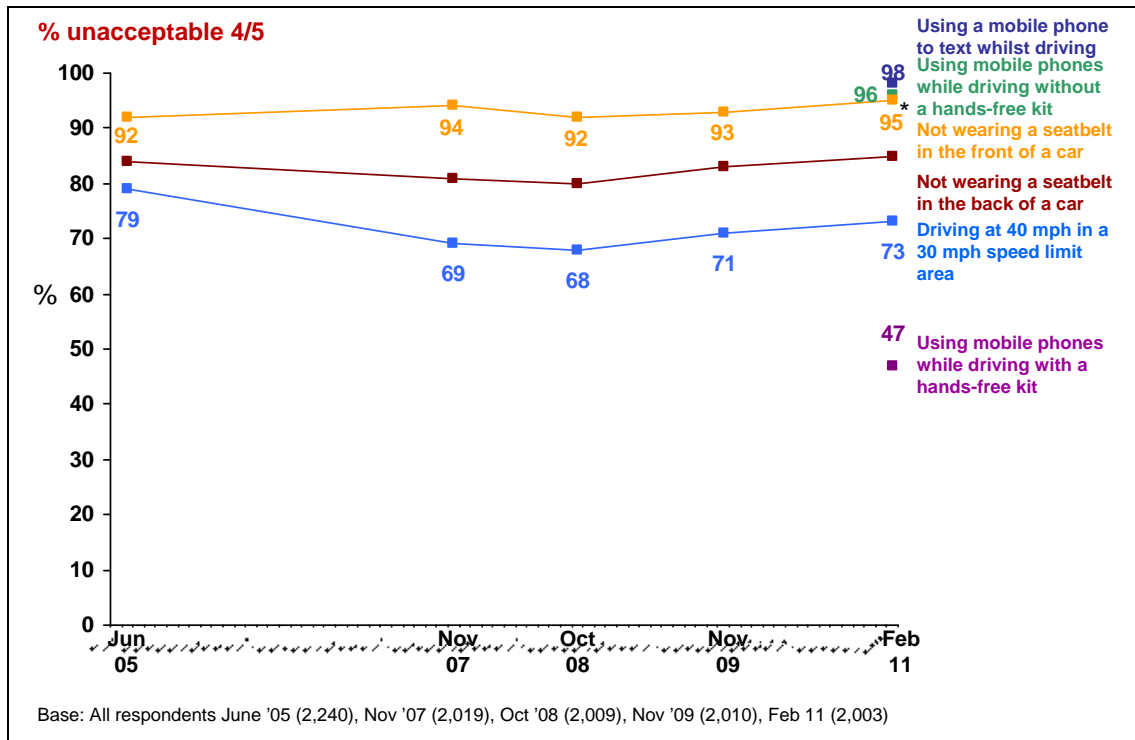
Strength of opinion on driving after drinking two pints was also softer, with only around half (47%) rating this as extremely unacceptable, compared with 66% who felt that driving when unsure if over the legal alcohol limit was extremely unacceptable. This fell to 35% of young men aged 16-29 and 34% of those living in London (compared with 68% of Scottish respondents).

Perceptions of the unacceptability of driving whilst tired remained stable at the overall level, with 78% scoring 4 or 5 in every year since 2007. There was little year on year change among either motorists or non motorists on this measure and no significant differences between these two groups.

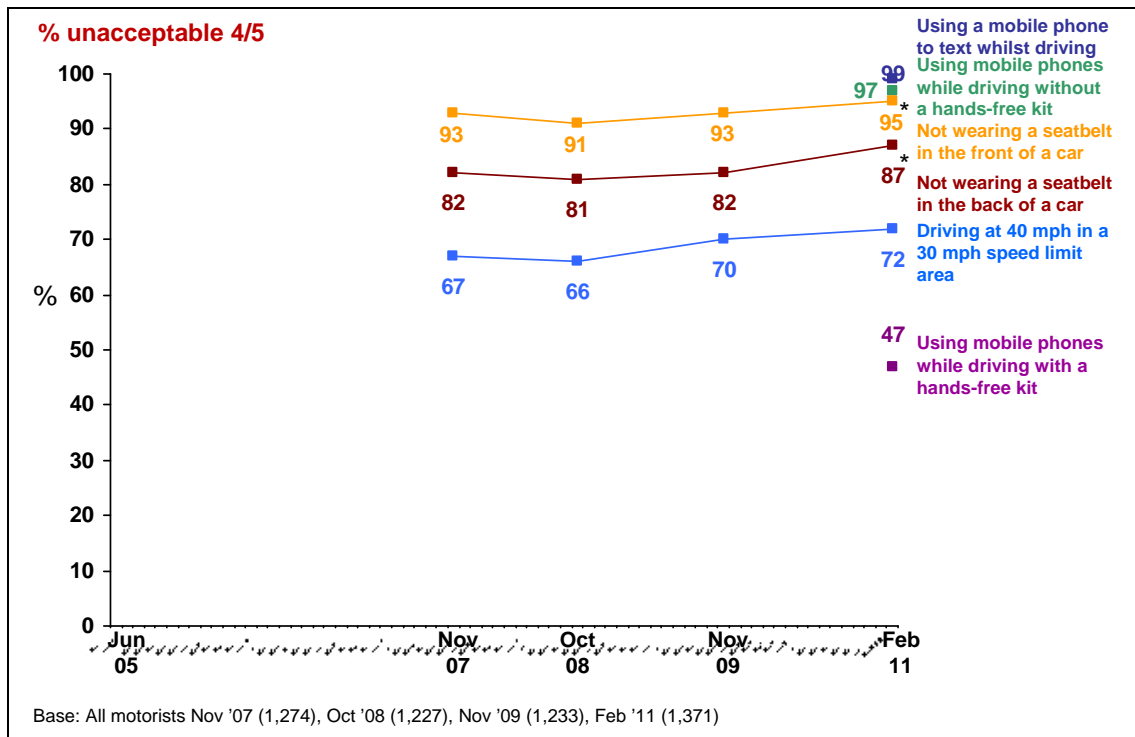
Charts 5d (all respondents), 5e (motorists) and 5f (non motorists) show the ratings of 4 or 5 for unacceptability of behaviours relating to speeding, use of mobile phones whilst driving and not wearing seat belts. As with the behaviours described above, these demonstrate a picture of stability on measures which have remained consistent over time (use of mobile phones whilst driving was asked differently in 2011), with some small but still significant differences between motorists and non motorists.



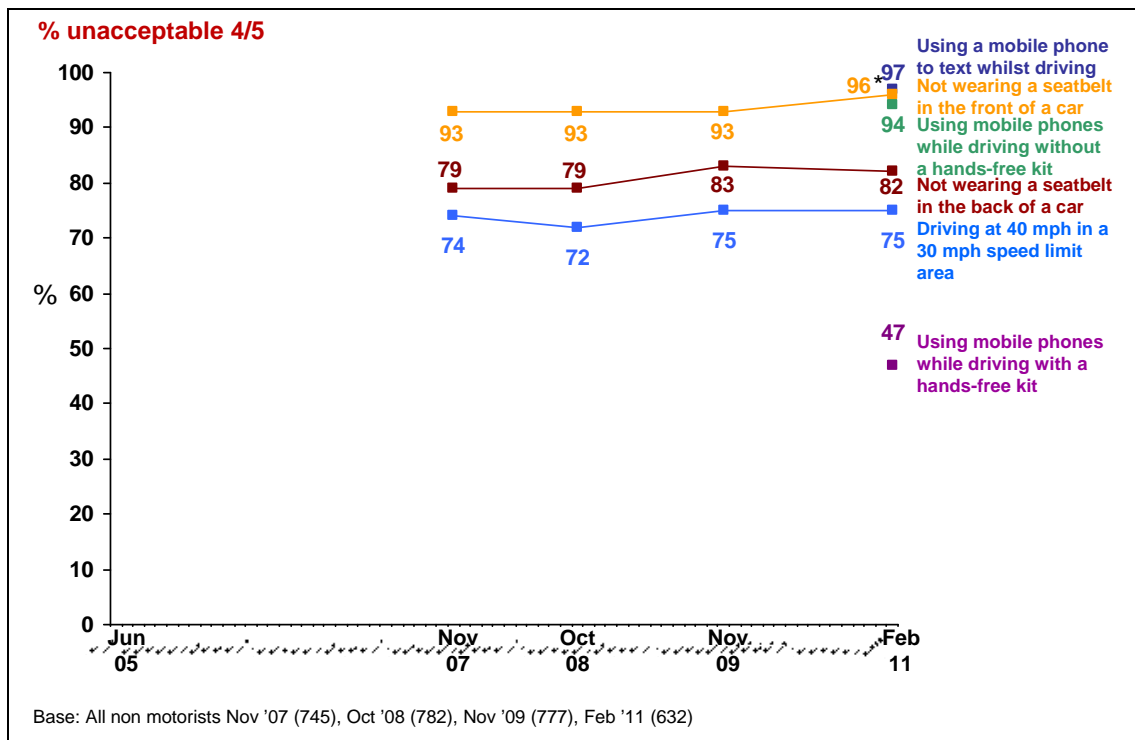
**Chart 5d – Extent to which think behaviours are unacceptable: speeding, using mobile phones while driving and not wearing seat belts (all respondents)**



**Chart 5e – Extent to which think behaviours are unacceptable: speeding, using mobile phones while driving and not wearing seat belts (all motorists)**



**Chart 5f – Extent to which think behaviours are unacceptable: speeding, using mobile phones while driving and not wearing seat belts (all non motorists)**



Driving while using a mobile phone has consistently received a high disapproval rating; over nine in ten respondents have rated it as 4 or 5 every year (94% in 2009). In 2011 the mobile phone behaviours were split into the two illegal behaviours of driving while using a mobile phone without hands-free and driving while texting, and the legal behaviour of using a mobile phone with a hands-free kit while driving. This demonstrated a clear distinction in attitudes.

Almost all respondents (98%) felt that it was unacceptable to text while driving (rising to 99% of motorists), with over nine in ten (92%) considering this extremely unacceptable. This high level of unacceptability is almost on a par with driving after taking Class A drugs, but is not a universally held belief. Young men, and to a lesser degree young women, were less likely than older respondents to believe that texting while driving was extremely unacceptable (79% of 16-29 year old men and 87% of 16-29 year old women).

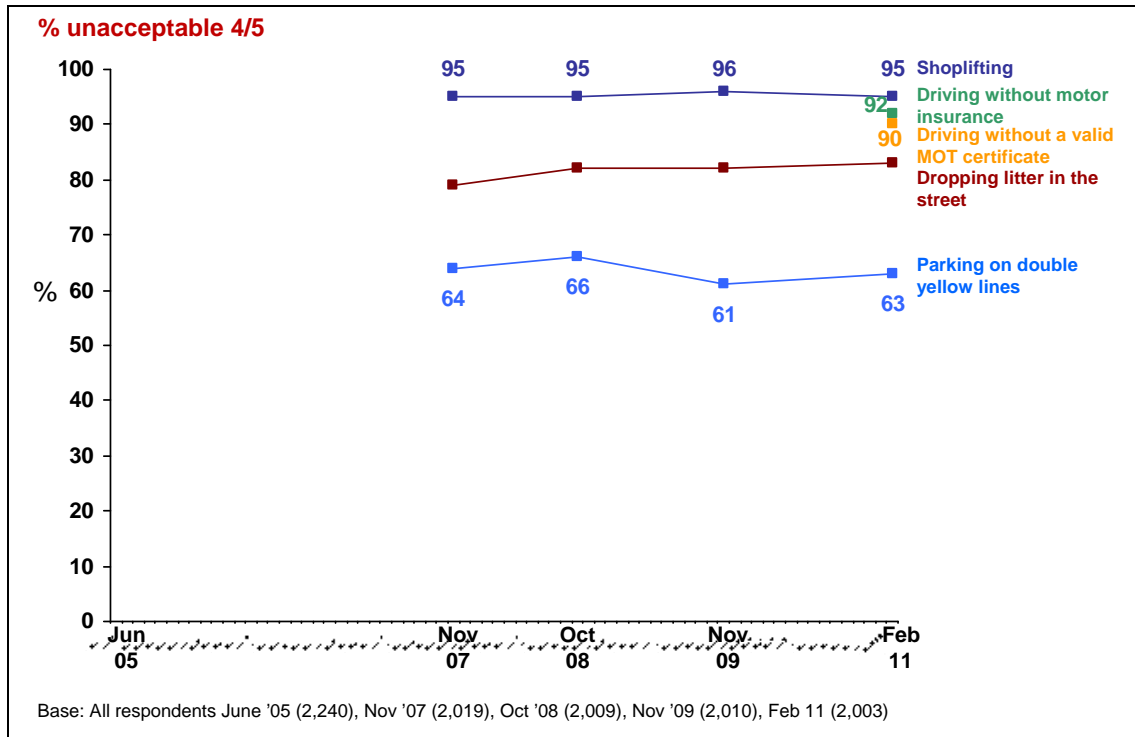
Using a mobile phone without a hands-free kit while driving was also deemed to be unacceptable by the majority (96%), although the strength of feeling was a little lower than for texting, with 87% considering it to be extremely unacceptable. As with using a mobile phone to text while driving, it was younger respondents who were least likely to give a rating of extremely unacceptable (72% of 16-29 year old men and 80% of 16-29 year old women). In contrast, just under half of respondents (47%) felt it was unacceptable to use a mobile phone with a hands-free kit while driving.

There have been increases in the proportion rating failure to wear seat belts in the front and back of a car as unacceptable over the last two years, particularly among motorists regarding wearing seat belts in the back of a car (87% in 2011 compared with 81% in 2008). However, opinion on seat belt wearing continues to vary according to whether this is the front seat or back seat of a car: although the proportion giving a score of 4 or 5 was high in both cases, there was significant variation in the strength of feeling. The 95% believing that failure to wear a seatbelt in the front was unacceptable comprised 85% scoring 5, and 10% scoring 4. By contrast, the 85% believing that failure to wear a seat belt in the back was unacceptable comprised just 66% scoring 5, and 19% scoring 4. Thus it remains evident that there is some way to go before wearing seat belts in the back of a car is perceived as equally important as wearing them in the front.

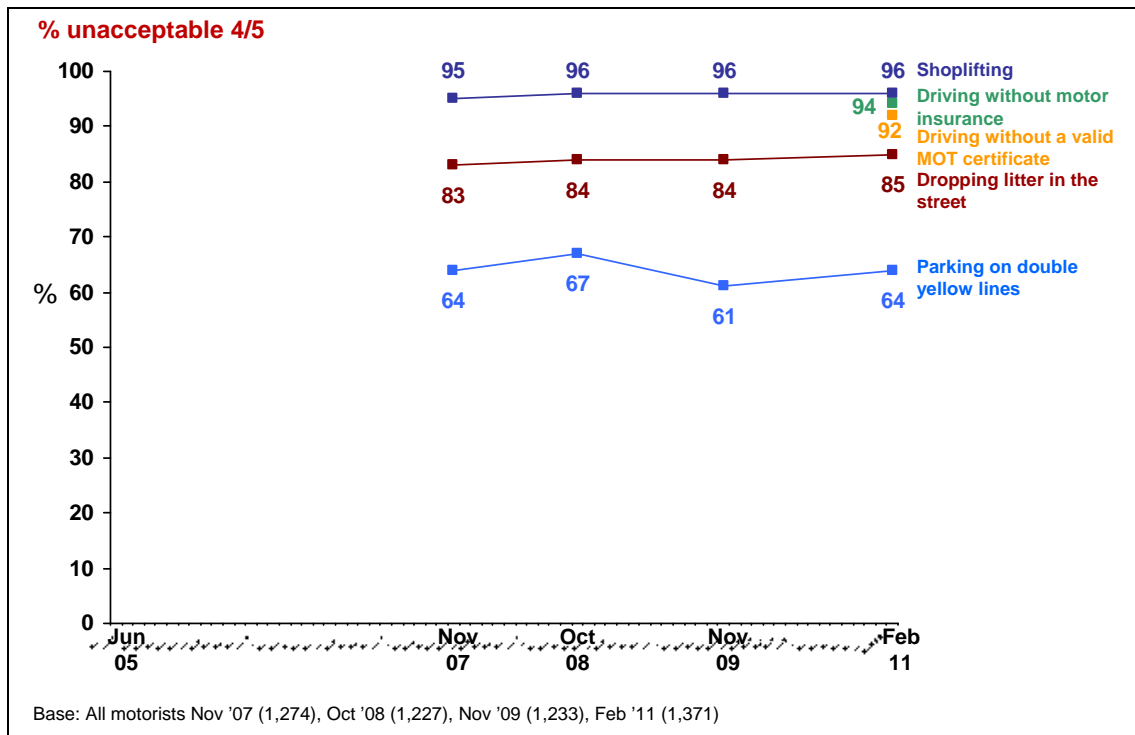
Since 2008 there has been a steady increase in the proportion of respondents believing that driving at 40mph in a 30mph zone is unacceptable, from 68% up to 73% in 2011. This increase has been driven by motorists (from 66% to 72%) and for the first time there is no significant difference between motorists and non motorists, with non motorists historically more likely to rate this behaviour as unacceptable. Just under half of all respondents (47%) rated driving at 40mph in a 30mph zone as extremely unacceptable, which demonstrates that strength of feeling on this issue is not particularly high compared with other behaviours. Young men in particular were less likely than others to consider driving at 40mph in a 30mph zone to be extremely unacceptable (33% of men aged 16-29).

Charts 5g (all respondents), 5h (motorists) and 5i (non motorists) show the ratings of 4 or 5 for the remaining driving behaviours (parking on double yellow lines, driving without motor insurance and driving without a valid MOT certificate), as well as the two behaviours used for context: dropping litter in the street and shoplifting.

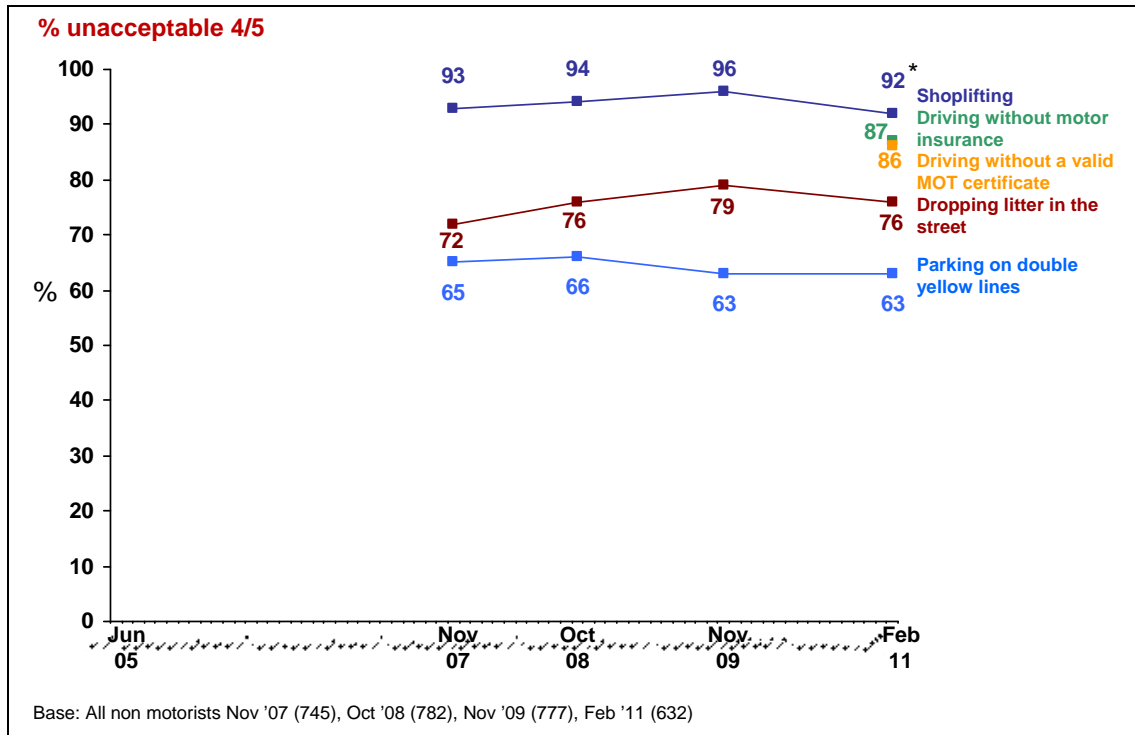
**Chart 5g – Extent to which think behaviours are unacceptable: parking on double yellow lines, driving without insurance/MOT, dropping litter and shoplifting (all respondents)**



**Chart 5h – Extent to which think behaviours are unacceptable: parking on double yellow lines, driving without insurance/MOT, dropping litter and shoplifting (all motorists)**



**Chart 5i – Extent to which think behaviours are unacceptable: parking on double yellow lines, driving without insurance/MOT, dropping litter and shoplifting (all non motorists)**



Around nine in ten respondents have given a score of 4 or 5 in the last three annual surveys when asked about driving without insurance and MOT. In 2011, these behaviours were separated and this demonstrated that there was little difference in the rating of overall unacceptability between the two: 92% for driving without motor insurance and 90% for driving without MOT. Respondents were, however, more likely to consider driving without motor insurance to be extremely unacceptable (80%, compared with 74% for driving without MOT). Motorists were more likely than non motorists to rate these behaviours as unacceptable (94% compared with 87% for driving without insurance and 92% compared with 86% for driving without MOT)

Parking on double yellow lines remains the illegal driving behaviour least likely to be considered unacceptable, with just 63% scoring this 4 or 5, in line with previous years. Only one in three respondents (33%) felt this behaviour was extremely unacceptable.

The data on the non-driving behaviours of shoplifting and dropping litter in the street provides some enlightening context. Shoplifting was considered unacceptable by 95% and extremely unacceptable by 87%, which makes it as serious as using a mobile without a hands-free kit while driving (96% unacceptable and 87% extremely unacceptable), not wearing a seat belt in the front of a car (95% unacceptable and 85% extremely unacceptable) and driving after smoking cannabis (94% unacceptable

and 85% extremely unacceptable). It was, however, deemed to be a little less serious than the top two offences of driving after taking Class A drugs and using a mobile phone to text while driving. Dropping litter in the street (83% unacceptable and 59% extremely unacceptable) was regarded at a similar level to not wearing a seat belt in the back of a car (85% unacceptable and 66% extremely unacceptable) and felt to be a little more unacceptable than carrying on driving when too tired (78% unacceptable and 49% extremely unacceptable). These contextual findings may be regarded as somewhat surprising, given that the driving behaviours in question are potentially life-threatening, whilst the same cannot be claimed in relation to shoplifting and littering.

## **5.2 Attitudes towards dangerous driving**

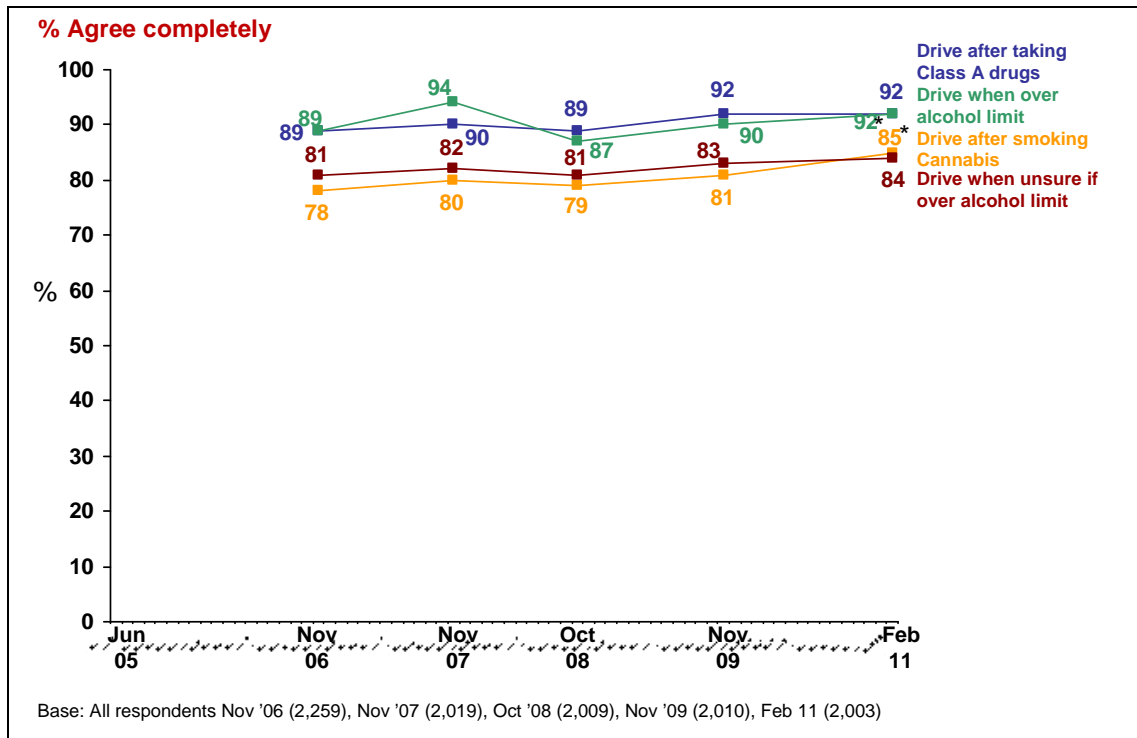
Respondents were shown a list of sixteen dangerous driving behaviours, and asked to rate the extent to which they agreed these were dangerous on a six-point scale from agree completely to disagree completely.

Respondents who did not agree completely that these behaviours were dangerous are a key target of THINK! campaigns. Looking across all behaviours it is clear that there are some groups with a more relaxed attitude towards such risk-taking. The groups consistently containing relatively high disagreement are young people aged 16-29 (especially men), black and minority ethnic respondents, those living in London and single people.

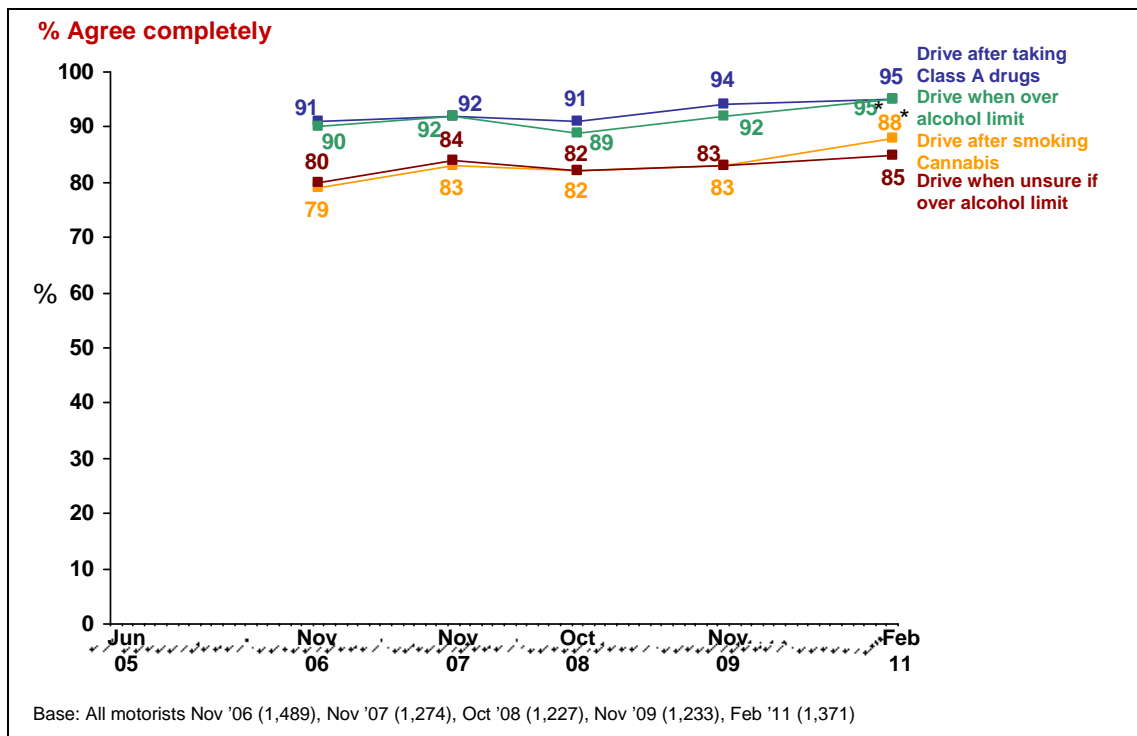
### **5.2.1 Drink or drug driving**

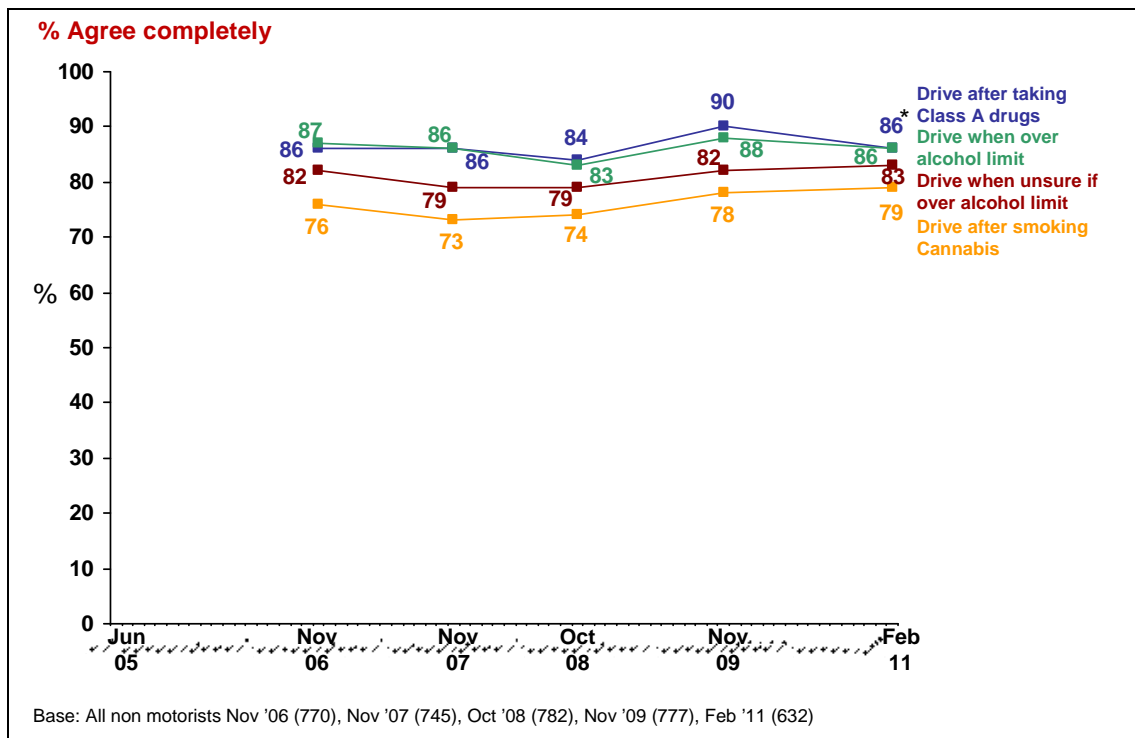
Driving after drinking alcohol or taking drugs are widely believed to be dangerous behaviours (Charts 5j, 5k and 5l). Respondents were more likely to completely agree that driving after taking Class A drugs is dangerous than driving after smoking cannabis and that driving when over the legal alcohol limit is dangerous than driving when unsure if over the legal alcohol limit.

**Chart 5j – Attitudes to dangerous driving: drink and drugs (all respondents)**



**Chart 5k – Attitudes to dangerous driving: drink and drugs (all motorists)**



**Chart 5I – Attitudes to dangerous driving: drink and drugs (all non motorists)**

Between 2008 and 2011 there has been an increasing trend in complete agreement that driving when over the legal alcohol limit (92% in 2011) and driving after smoking cannabis (85% in 2011) are dangerous. For driving when over the legal alcohol limit, this is now approaching the peak of 94% in 2007, while complete agreement that smoking cannabis is dangerous has now reached a new high. The level of complete agreement that driving after taking Class A drugs is dangerous and that driving when unsure if over the legal alcohol limit is dangerous has remained consistent over time (92% and 84% respectively in 2011).

Complete agreement that these behaviours are dangerous was higher among motorists than non motorists for all except driving when unsure if over the legal alcohol limit, where there was no difference between the two groups. Increases in complete agreement that driving when over the legal alcohol limit and driving after smoking cannabis are dangerous were driven by increases among motorists, with no significant changes in perceptions of these behaviours among non motorists.

Across these four behaviours, those less likely to completely agree that they were dangerous were typically young men aged 16-29, black and minority ethnic respondents, those living in London and single people.

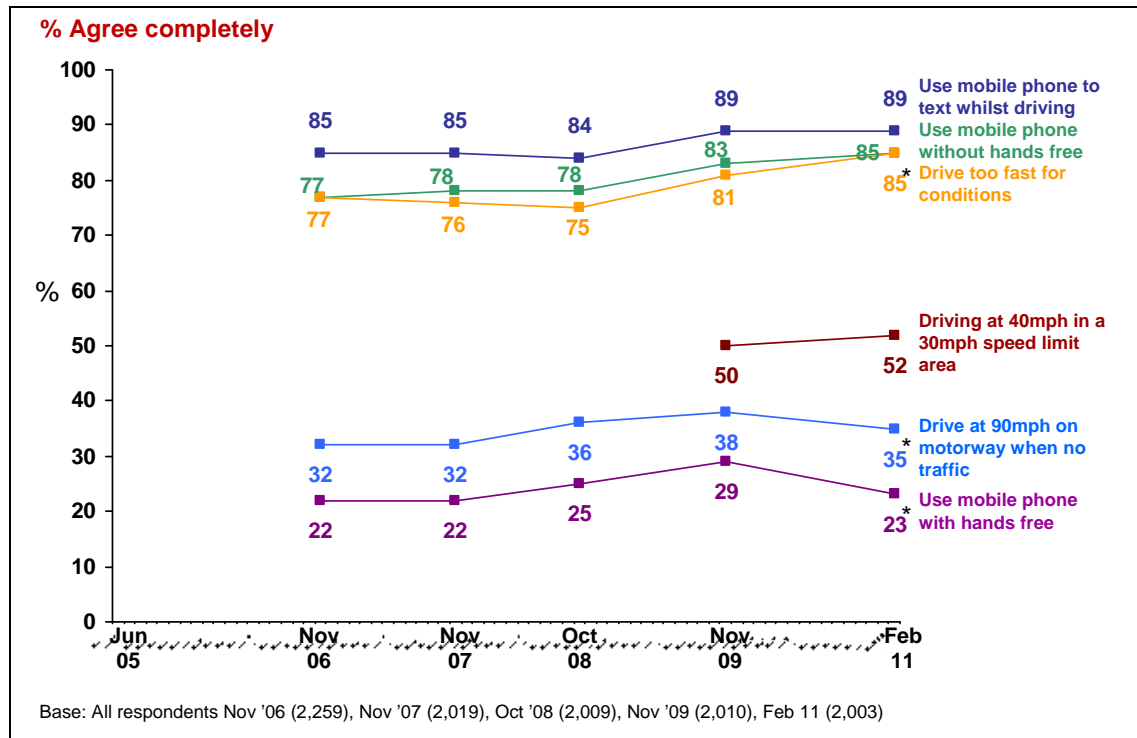
### 5.2.2 Speeding and mobile phones

Outside of drink and drug driving, using a mobile phone to text while driving was the behaviour respondents were most likely to completely agree was dangerous (89% in

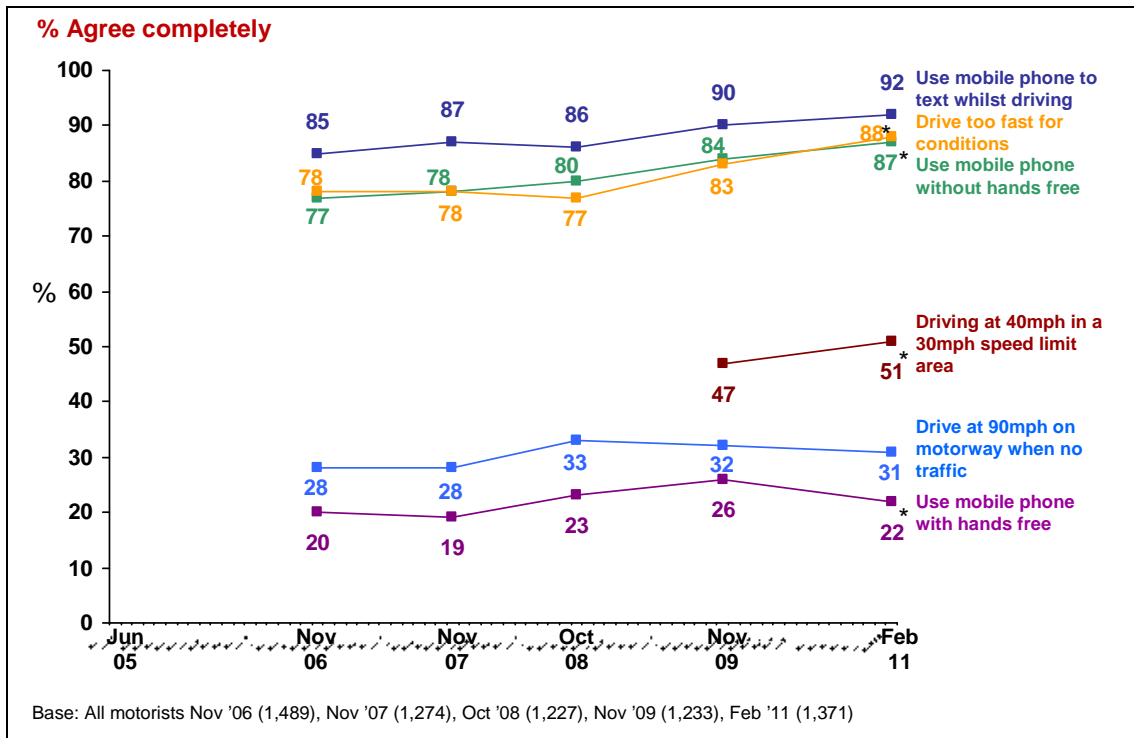


2011). This was closely followed by using a mobile phone without a hands-free kit and driving too fast for the conditions (both 85%), with lower levels of complete agreement that other behaviours relating to mobile phone usage and speeding are dangerous (Charts 5m, 5n and 5o).

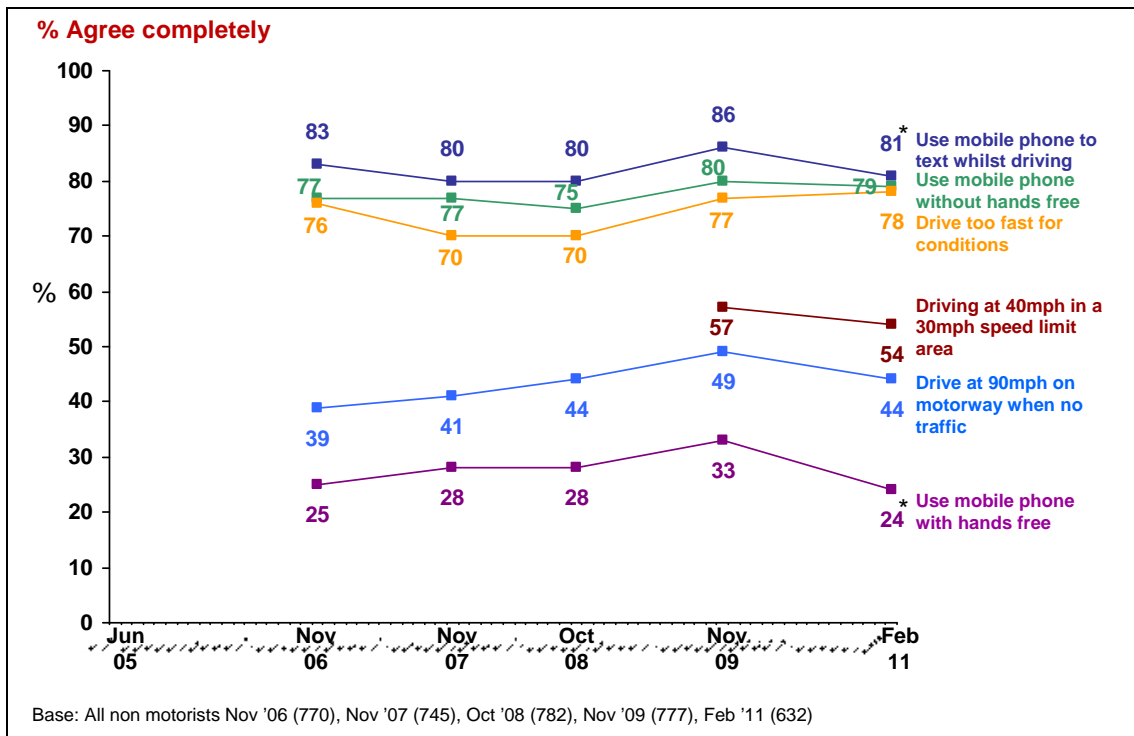
**Chart 5m – Attitudes to dangerous driving: speeding and mobile phones (all respondents)**



**Chart 5n – Attitudes to dangerous driving: speeding and mobile phones (all motorists)**



**Chart 5o – Attitudes to dangerous driving: speeding and mobile phones (all non motorists)**



While there has been no significant change in the last year in the proportion of respondents completely agreeing that texting while driving and using a mobile phone

without a hands-free kit while driving are dangerous, these did increase the previous year and remain at significantly higher levels than in 2006. Conversely, the proportion completely agreeing that using a mobile phone with a hands-free kit while driving is dangerous has fallen to 23% this year, which is a return to 2006 levels.

Complete agreement that driving too fast for the conditions is dangerous increased again in 2011 and now stands at 85%, compared with a consistent three in four between 2006 and 2008. However, the proportion completely agreeing that it is dangerous to drive at 90mph on the motorway fell to 35% in 2011, which was a return to 2008 levels after an increase in 2009. Half (52%) completely agreed it was dangerous to drive at 40mph in a 30mph speed limit area, unchanged from when it was first asked in 2009.

Motorists were more likely than non motorists to completely agree that it is dangerous to use a mobile phone to text while driving (92% compared with 81%) and to use a mobile phone without a hands-free kit while driving (87% compared with 79%). For both of these behaviours, this is the widest the gap between the two groups has been, with this gap opening up due to steady increases in complete agreement among motorists, but with opinion largely unchanged among non motorists. Motorists were also more likely to completely agree that it is dangerous to drive too fast for the conditions (88% compared with 78%), again driven by sustained increases in complete agreement among motorists.

Young people aged 16-29 (particularly men within this age group), those living in London, black and minority ethnic respondents and single people were less likely than others to completely agree that the two illegal mobile phone behaviours of texting while driving and using a mobile phone without a hands-free kit while driving are dangerous. However, there was a different profile of those with a lower level of complete agreement that using a mobile phone with a hands-free kit is dangerous: these covered a broader age range (13% of men aged 16-44) and were typically those who drove further (over 10,000 miles) in a typical year (13%), including drivers for work (16%) and commuters (17%), as well as motorcyclists (18%) and those living in Wales (16%).

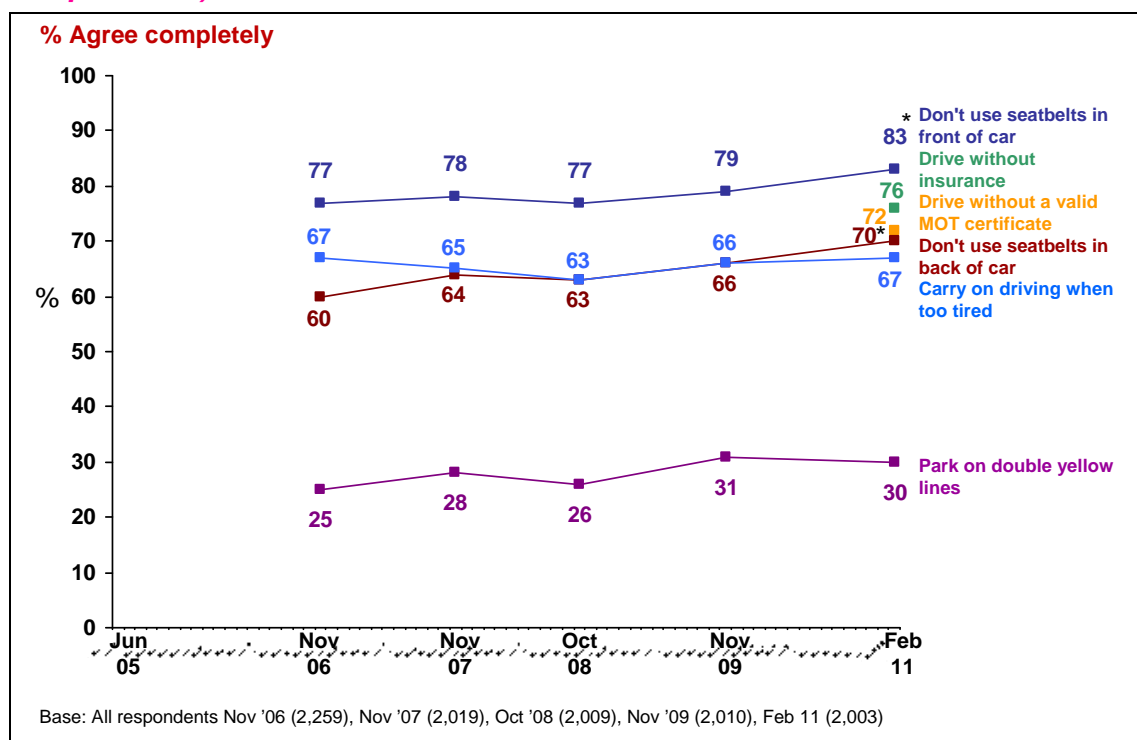
While there were some groups less likely to completely agree that each of the three speeding behaviours were dangerous, there was not always a consistent pattern across these behaviours. However, as with a number of other behaviours, the groups that stood out as less likely to completely agree these were dangerous were men aged 16-29 and those living in London. For driving at 90mph on the motorway, there was a broader age range (16-54 year old men) for which complete agreement was lower (24%), with ABC1s (28%), motorcyclists (19%), drivers for work (24%) and those driving more than 10,000 miles a year (22%) also less likely to completely

agree. ABC1s (49%) were additionally less likely to completely agree that driving at 40mph in a 30mph zone is dangerous, but did not stand out from other groups in their perceptions of the danger surrounding driving too fast for the conditions. In line with a number of other behaviours, and in addition to young men (73%) and those living in London (68%), single people (77%) and black and ethnic minority respondents (64%) were less likely than those in other groups to completely agree it is dangerous to drive too fast for the conditions.

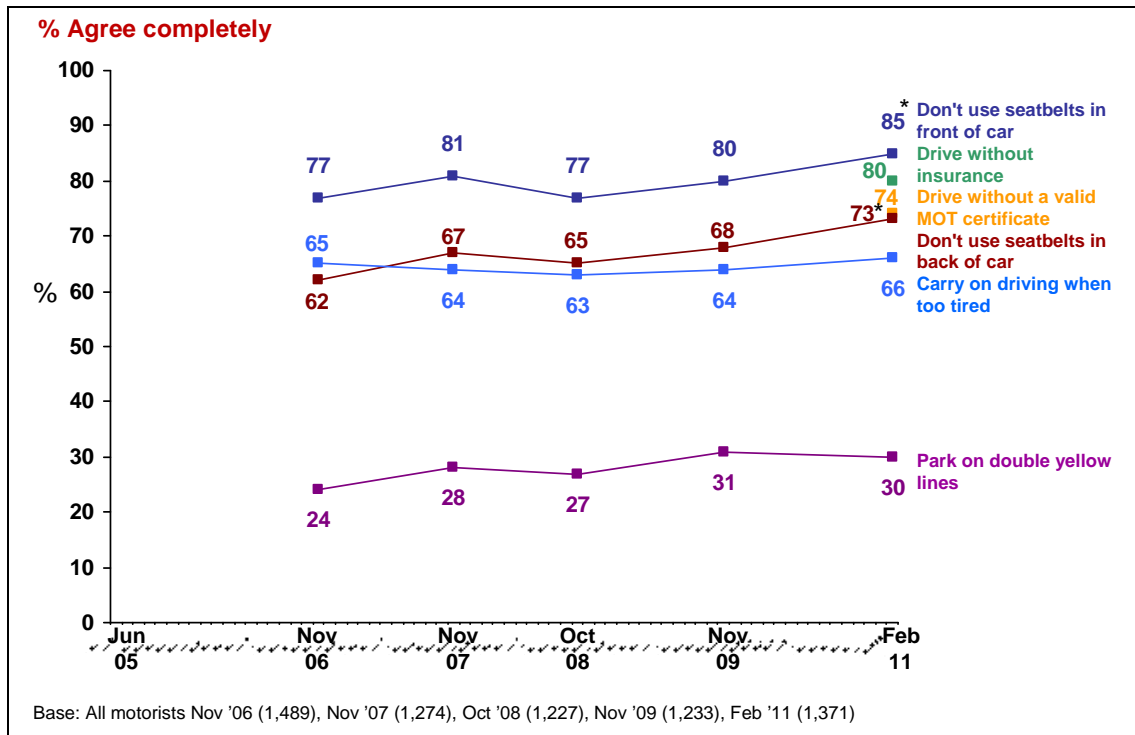
### 5.2.3 Seat belts and other behaviours

The remaining dangerous driving behaviours included not wearing seat belts, driving without insurance or MOT, carrying on driving when too tired and parking on double yellow lines (Charts 5p, 5q and 5r). In previous years driving without insurance or MOT was asked as one behaviour, but this was separated into two in 2011.

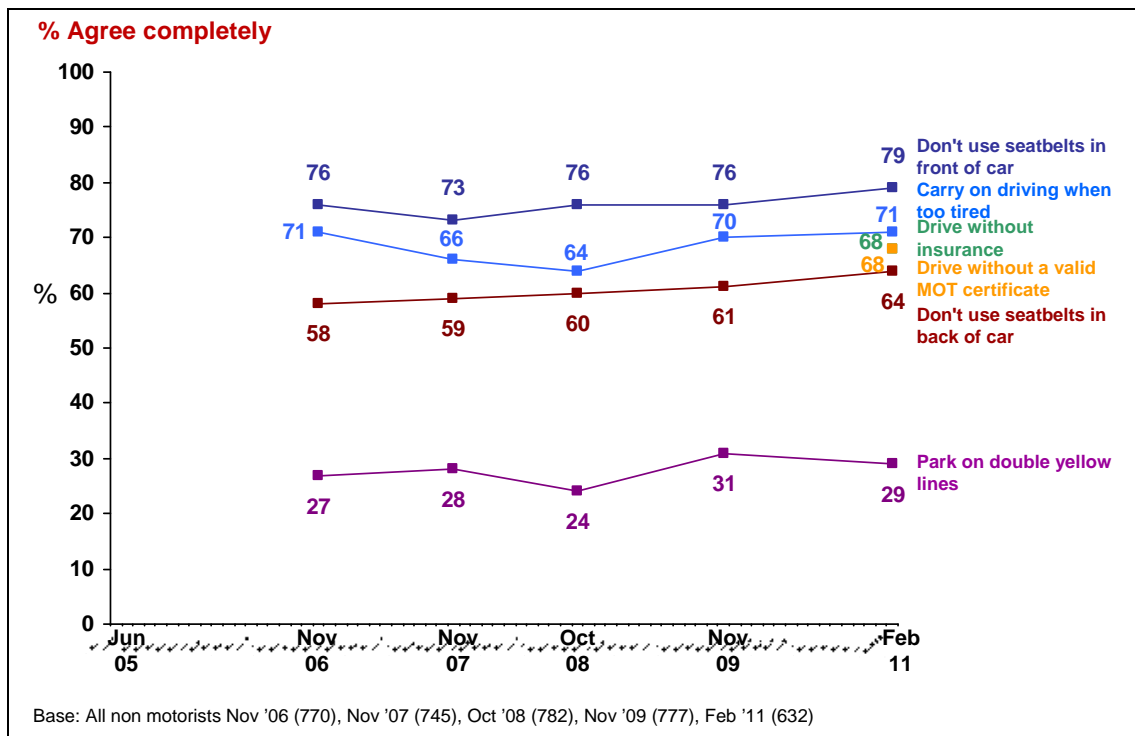
**Chart 5p – Attitudes to dangerous driving: seat belts and other behaviours (all respondents)**



**Chart 5q – Attitudes to dangerous driving: seat belts and other behaviours (all motorists)**



**Chart 5r – Attitudes to dangerous driving: seat belts and other behaviours (all non motorists)**



Perceptions of the danger of not wearing seat belts have been steadily increasing over recent years, both for the front of a car (83% in 2011, up from three in four

between 2006 and 2008) and the back of a car (70% in 2011, up from 60% in 2006). These increases have been largely driven by increases among motorists.

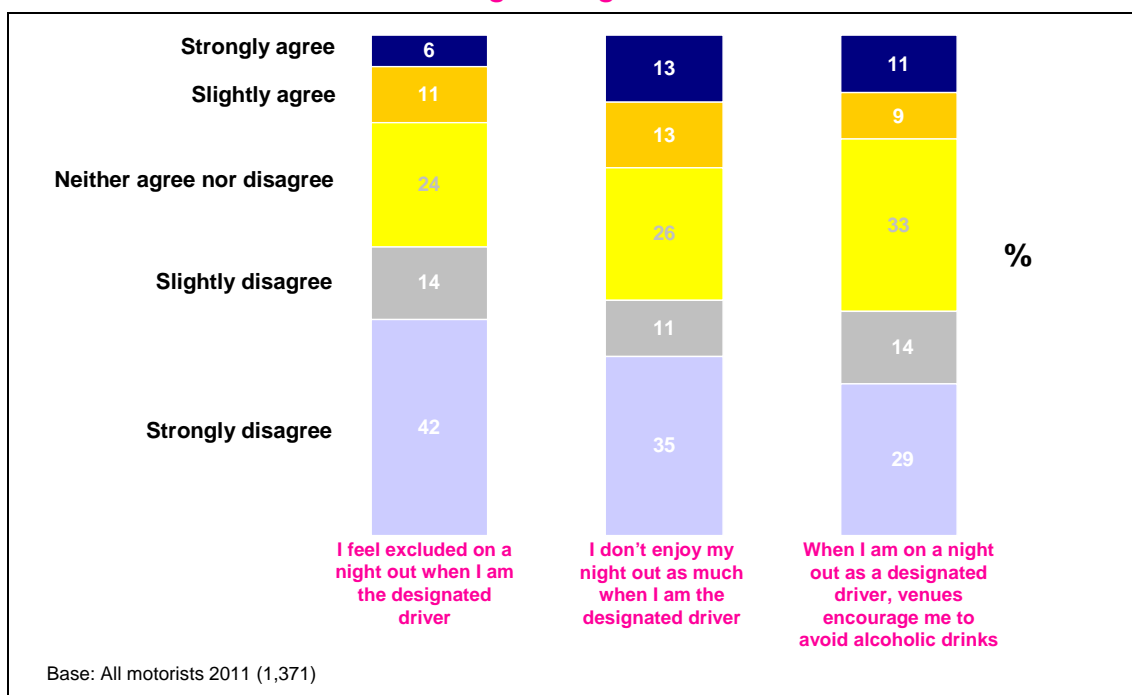
Three quarters of respondents completely agreed that driving without insurance (76%) and driving without MOT (72%) are dangerous, with complete agreement higher among motorists than non motorists. This is in line with the proportion completely agreeing in previous years when the two behaviours were combined (between 70% and 76% in each year from 2006 to 2009).

A steady two thirds of respondents (67% in 2011) completely agreed it is dangerous to carry on driving when too tired, while three in ten (30% in 2011) completely agreed it is dangerous to park on double yellow lines. Non motorists have consistently been more likely than motorists to rate driving when tired as dangerous, whereas there was no difference between the two groups in the perceived danger of parking on double yellow lines.

As with other behaviours, it was typically men aged 16-29, single people, black and minority ethnic respondents and those living in London who were among the groups least likely to completely agree that these were dangerous behaviours. There were however some deviations from this. For parking on double yellow lines, young women held a similarly low level of strong agreement to young men (22% of 16-29 year old women and 21% of 16-29 year old men) and there were no differences between black and minority ethnic and white respondents. The perceived danger of not wearing a seat belt in the back of a car was held in lower regard by those aged 55+ (66%) than younger respondents, and single people did not stand out on either of the seat belt behaviours.

### **5.3 Designated drivers**

Christmas 2010 campaign activity included messages targeted at designated drivers, including a partnership with Coca-Cola to encourage drivers to avoid alcoholic drinks on a night out. In order to measure attitudes around being a designated driver, questions were added to the Annual Survey in 2011.

**Chart 5s – Attitudes towards being a designated driver**

Over half of motorists (56%) disagreed that they felt excluded when they were a designated driver on a night out. However, a significant minority (17%) agreed this was the case, and one in four (26%) agreed that they did not enjoy their night out as much when they were the designated driver. While young and single people and those who drank alcohol at least once a week were more likely to agree with both of these statements, there was a gender difference in terms of enjoyment (30% of men compared with 22% of women agreed they did not enjoy their night out as much if they were the designated driver) that was not present in terms of whether men and women felt excluded as a designated driver. C2DEs were more likely than ABC1s (21% compared with 15%) to feel excluded on a night out as a designated driver. There were also regional differences, with those in London more likely than those in other regions to agree they do not enjoy a night out as much as a designated driver (34%) but those in Wales more likely than others to agree that they feel excluded on a night out as a designated driver (26%).

Only one in five motorists (20%) agreed that when they were on a night out venues encouraged them to avoid alcoholic drinks and almost half (44%) disagreed with this. There were very distinct differences between young men and women (aged 16-29), with 30% of young men in agreement compared with 14% of young women, and men overall more likely to agree than women (24% compared with 17%).

## 6. Road user behaviour

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This chapter explores the prevalence of dangerous driving behaviours and the *perceived* prevalence of dangerous driving behaviours. It then goes on to look at the proportion of drivers who have received driving related penalties.

### 6.1 Prevalence of dangerous driving behaviours

In order to measure the prevalence of dangerous driving, respondents were asked how often, if at all, they carried out a range of behaviours. These questions were asked only of drivers aged 18 or above, and presented as a self-completion exercise in order to reduce bias due to social desirability. In 2005 the self completion section of the survey was administered on a paper questionnaire, but since 2006 it has been administered on a laptop using Computer Assisted Personal Interviewing technology. There has been a step-change between 2005 and 2006 in some data, possibly owing to the change in method of data collection, as the paper method may have felt less anonymous to some respondents and may therefore have prevented them from giving completely truthful answers.

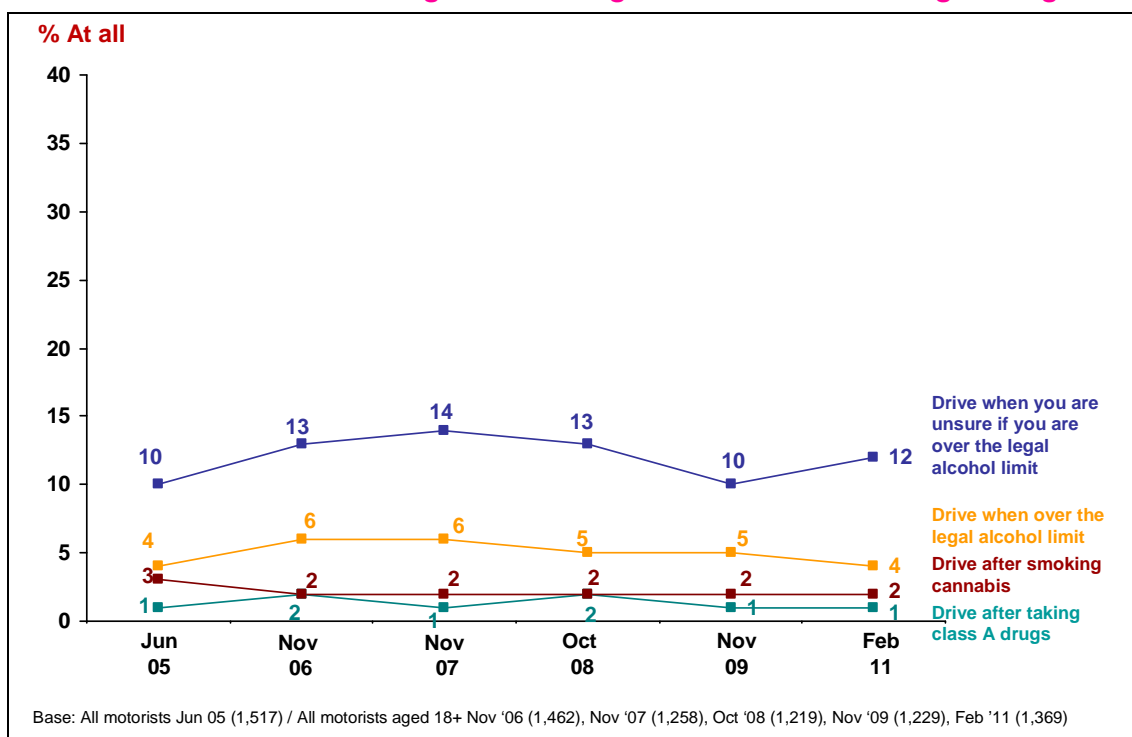
Motorists aged 18+ were additionally asked how many of the people they know had carried out the same dangerous driving behaviours. This question was introduced in 2008 to gauge which behaviours were felt to be commonplace, with the hypothesis that drivers might feel dangerous or illegal behaviours to be more socially acceptable if they are more widely practised.

Each of the sections below begins by showing the stated prevalence amongst drivers of certain behaviours, grouped together into related sets (driving under the influence of drink or drugs; speeding; use of mobile phones; use of seat belts; and various other behaviours). This is followed by, and compared with, findings on the *perceived* prevalence of these behaviours amongst people the drivers know.

#### 6.1.1 Driving under the influence of drink or drugs

The prevalence of drink-driving was explored using two questions, and two further questions were used to gauge the prevalence of driving under the influence of drugs. The results from all four questions are shown in Chart 6a.



**Chart 6a – Prevalence of dangerous driving behaviour – drink/drug driving**

In terms of drink/drug-driving, the behaviour motorists most commonly admitted to was driving when unsure whether they are over the legal alcohol limit (12%). Compared with other motorists, men aged 18-29 (25%), single people (16%) and people living in London (21%) were more likely to admit to driving in this condition.

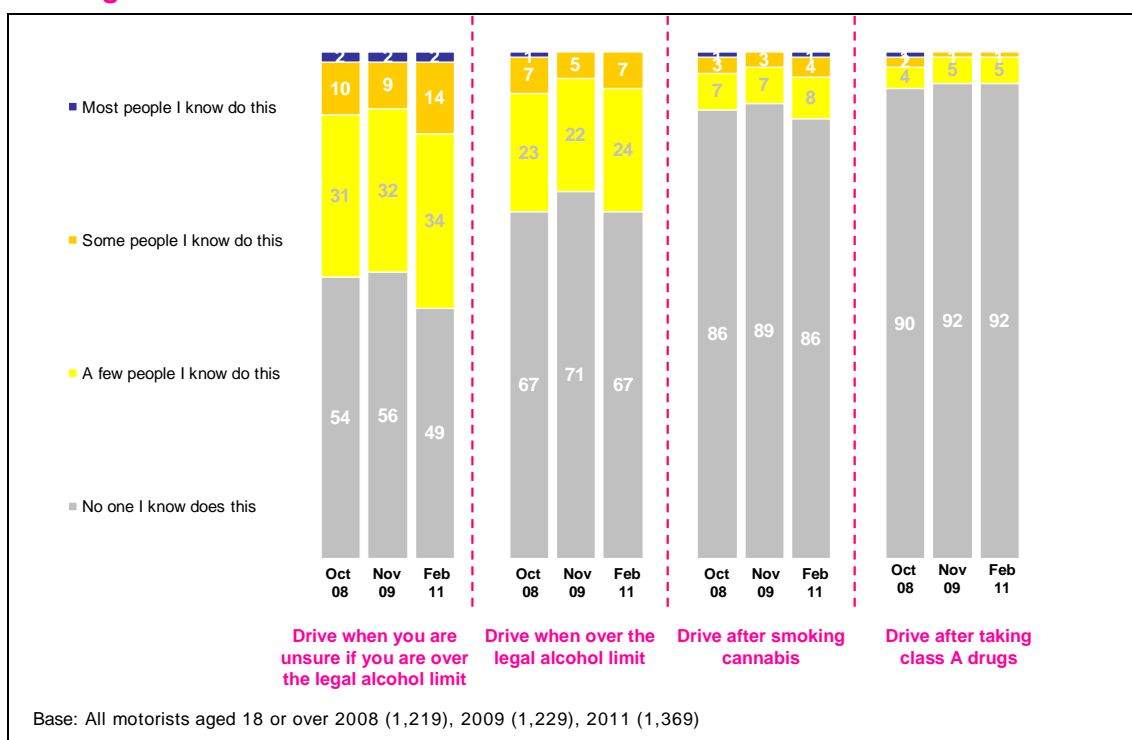
One in twenty (4%) motorists admitted that they have driven despite knowing they were over the legal alcohol limit. Once again, men aged 18-29 (9%), single people (7%), and people living in London (12%), along with people in social grades A and B (7%), had a greater likelihood than other motorists of admitting to this behaviour.

A tiny minority admit to driving after smoking cannabis (two per cent) or after taking class A drugs (one per cent). Male 18-29 year-olds and single people led the way when it came to driving under the influence of cannabis (10% and 5% respectively), but no subgroups stood out as particularly likely to drive after taking class A drugs.

Despite minor fluctuations over the years, the proportion of motorists engaging in each of these behaviours has remained roughly stable since 2005.

The 2011 data on *perceived* prevalence of driving whilst under the influence of alcohol and drugs is illustrated in Chart 6b, along with all available back-data. Despite there being no change in motorists' reported behaviours over time, the chart shows that more motorists in 2011 than in previous years know people who engage in these behaviours.

**Chart 6b – Perceived prevalence of dangerous driving behaviour – drink/drug driving**

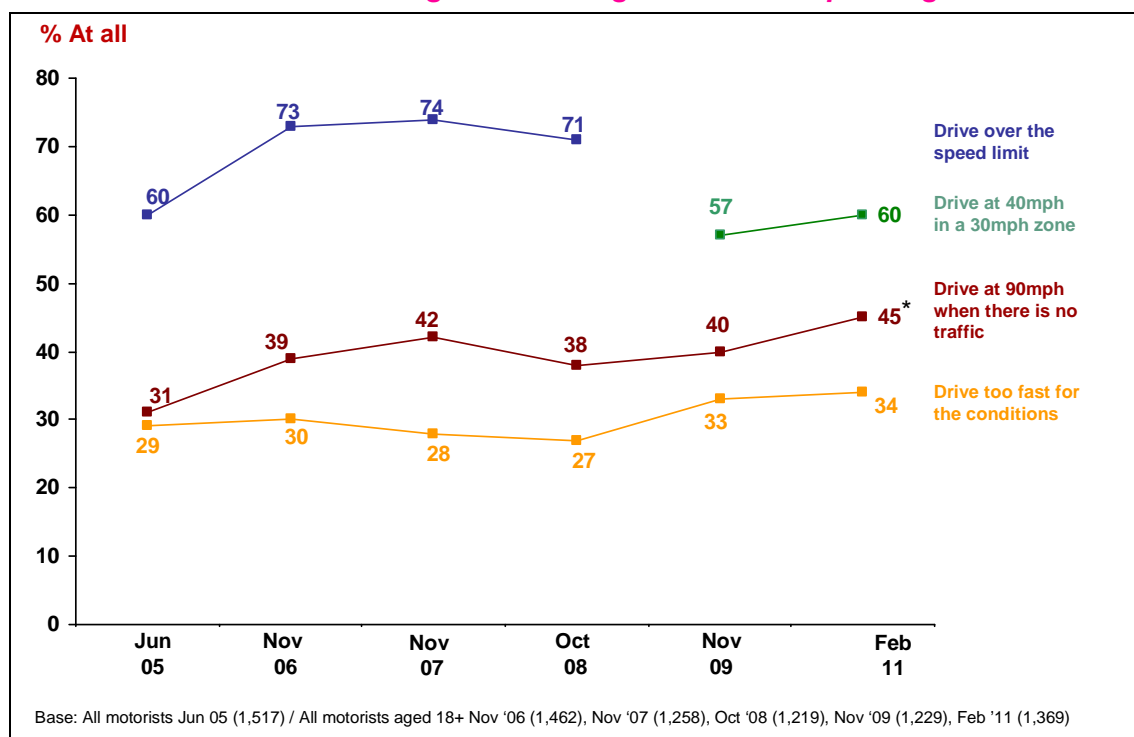


Half of motorists (50%) reported that they know people who drive when they are not sure if they are over the legal alcohol limit, with two per cent saying that this is something done by most of the people they know. This represents a significant rise from previous years (43% in 2008 and 2009).

Three in ten motorists (31%) said that they know at least a few people who drive when over the legal alcohol limit, up from 2009 (27%). The same period saw a rise in the proportion of motorists saying they know people who drive after smoking cannabis (13% in 2011, up from 10% in 2009). By contrast, the proportion who know people who have driven after taking class A drugs has remained stable, at just above one in twenty (7%).

### 6.1.2 Speeding

Chart 6c illustrates the proportion of motorists who report speeding in motorised vehicles.

**Chart 6c – Prevalence of dangerous driving behaviour – speeding**

Prior to 2009, motorists were asked whether they drove over the speed limit. In 2009 this statement was substituted by a question on a more specific speeding behaviour, namely driving at 40mph in a 30mph area. Fewer drivers admitted to this more specific behaviour (six in ten) than to the more generic behaviour asked about previously (around seven in ten). Although 60% of all motorists admitted speeding in a 30mph zone in 2011, those most likely to acknowledge this were men under the age of 45 (71%), those in social grade C1 (64%) and people living in the South East (66%).

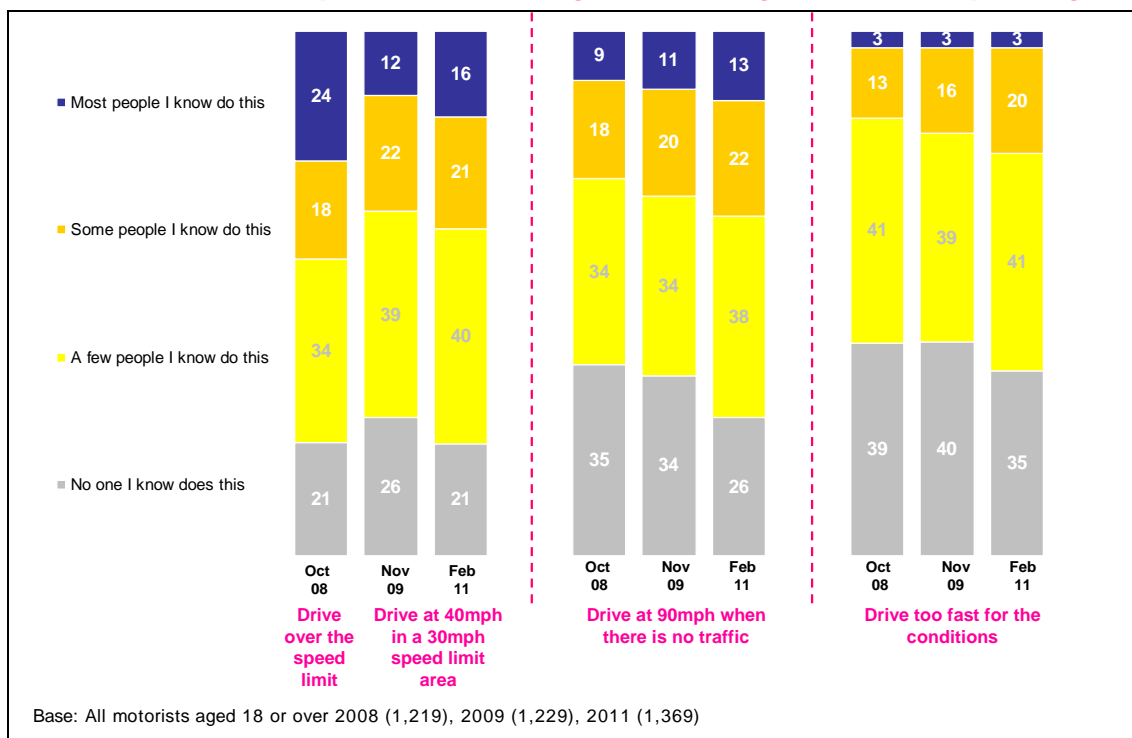
Forty-five per cent of motorists admitted to driving at 90mph on a motorway when there is no traffic, up from around four in ten between 2006 and 2009 (note that the figure of 31% reported in 2005 should be used with caution due to a different method used to collect the data). Compared with the average motorist, men aged 18-54 (66%), ABC1s (49%), motorcyclists (58%), and those living in London (53%) or the South East (50%) were more likely to report that they did this.

One third of drivers (34%) acknowledged that they sometimes drive too fast for the conditions. This behaviour was most commonly reported by men under the age of 45 (48%) and those who drive as part of their job (41%).

While a slight upward trend over time is apparent on all three of these speeding behaviours, driving at 90mph is the only behaviour whose frequency has risen significantly between 2009 (40%) and 2011 (45%).

The next chart (6d) shows that the majority of drivers know someone who speeds, and that speeding is perceived to be more widespread in 2011 than it was in previous years.

**Chart 6d – Perceived prevalence of dangerous driving behaviour – speeding**



Three quarters of drivers (78%) know at least a few people who drive at 40mph in a 30mph speed limit area. This was perceived to be the most common of the speeding behaviours asked about in the 2011 survey; its prevalence is similar to that of 'driving over the speed limit', a behaviour asked about in 2008. Between 2009 and 2011 there has been a rise in the proportion of drivers who know someone who speeds in a 30mph restricted zone (from 73% to 78%), reflecting an increase in the number of respondents reporting that 'most people they know' do this (16% in 2011, up from 12% in 2009).

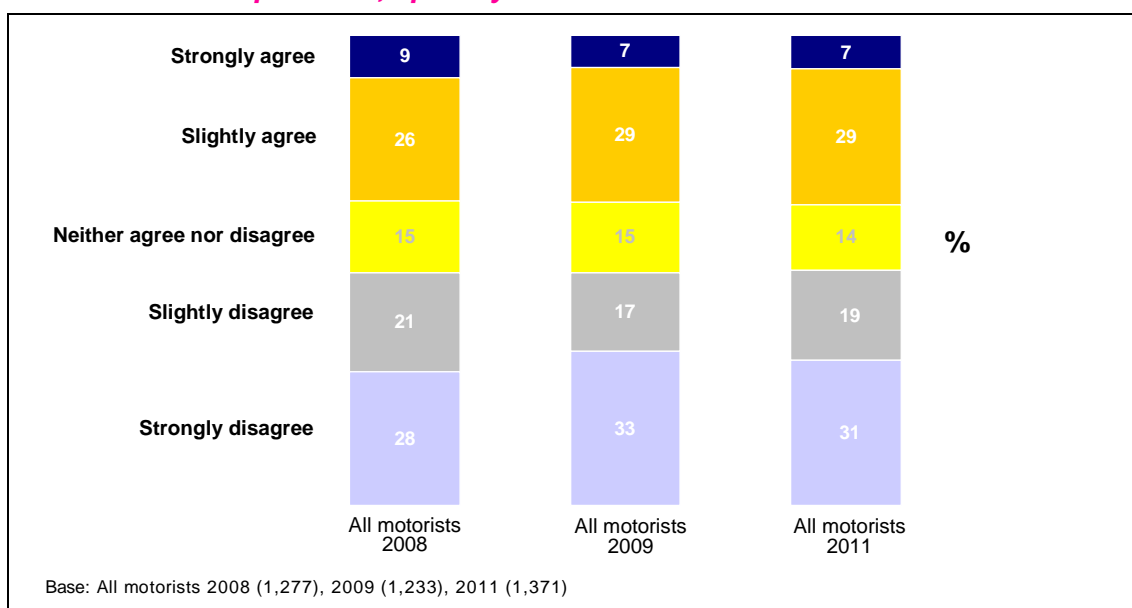
In the minds of respondents, driving at 90mph on the motorway when there is no traffic is almost as widespread as speeding in a 30mph restricted zone. The proportion of drivers saying they know someone who drives at 90mph has risen every year since the question was first introduced in 2008, reaching 73% in 2011. Beneath the recent change is an increase in the number of drivers who know 'a few people' who drive at 90mph (rising from 34% in 2009 to 38% in 2011).

Over six in ten drivers said they know at least a few people who drive too fast for the conditions. As with other speeding behaviours, the perceived prevalence of this behaviour has risen between 2009 and 2011 (from 58% to 64%). However, there has

been no change in the proportion saying that 'most people they know' do this (remaining low at 3%).

A further question about speeding was asked as part of a different set of questions. Chart 6e shows the level of agreement with the statement "when I am driving in the country and there is a clear open road, I put my foot down". This was asked of all survey respondents, but the data is shown only for drivers of cars, vans, lorries and motorcycles.

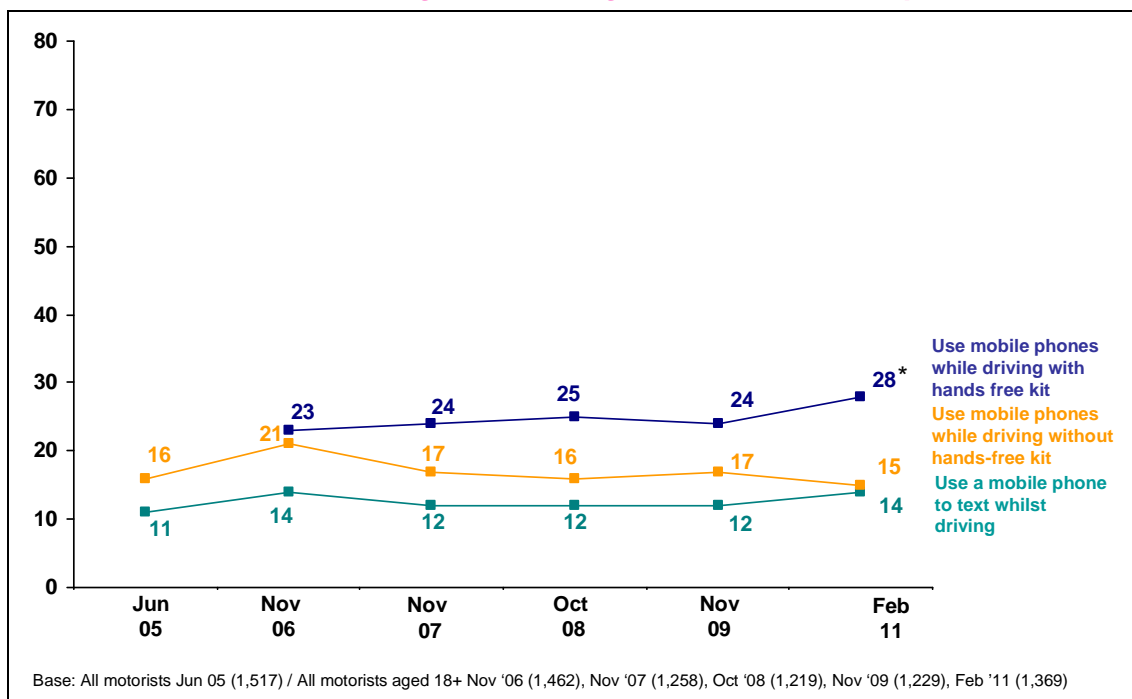
**Chart 6e – Agreement with statement: 'when I am driving in the country and there is a clear open road, I put my foot down'**



Over a third of motorists (36%) agreed that they speed on clear country roads, but half (50%) disagreed. The pattern of response is almost identical to that of 2008 and 2009. Men aged 30-54 (47%), those who drive as part of their job (44%) and motorcyclists (46%) were more likely than anyone else to agree with this statement.

### 6.1.3 Use of mobile phones

The prevalence of using mobile phones whilst driving is shown in Chart 6f.

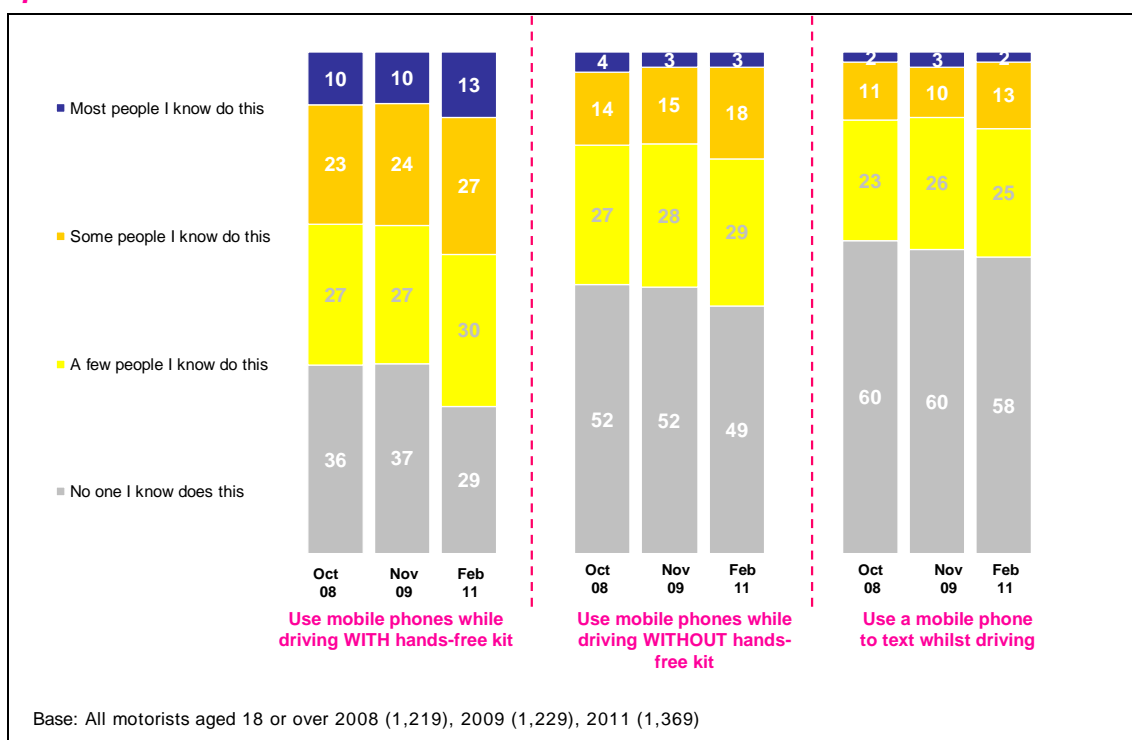
**Chart 6f – Prevalence of dangerous driving behaviour – mobile phones**

In 2011, a similar proportion of motorists acknowledged using a mobile without a hands-free kit (15%) as admitted to texting whilst driving (14%), whereas in previous years using a mobile without hands-free was a more prevalent behaviour. Taking out the 2005 data, prevalence of using a mobile phone without a hand-free kit while driving has fallen from 21% in 2006, while the prevalence of texting while driving has remained stable. Almost twice as many used their mobile phones in their vehicle with a hands-free kit (28% in 2011, up from around a quarter in previous years). Commuter drivers were more likely than other drivers to engage in the three behaviours (21% do not use a hands-free kit whilst driving, 20% text whilst driving, and 37% drive using a hands-free kit).

Other subgroups also stood out as being particularly likely to say they did one of these three things. Using a mobile without a hands-free kit was more commonly reported amongst men below the age of 45 and by people in social grades A and B (26% and 21%, respectively). The group most likely to admit to texting whilst driving were men and women under the age of 30 (34%). Men under the age of 55 (46%) and those who drive as part of their work (44%) were more likely than other motorists to speak on their mobile using a hands-free kit whilst driving.

Turning next to motorists' perceptions of other people's use of mobile phones when driving, the data from 2011 and previous years is shown in Chart 6g.

**Chart 6g – Perceived prevalence of dangerous driving behaviour – mobile phones**

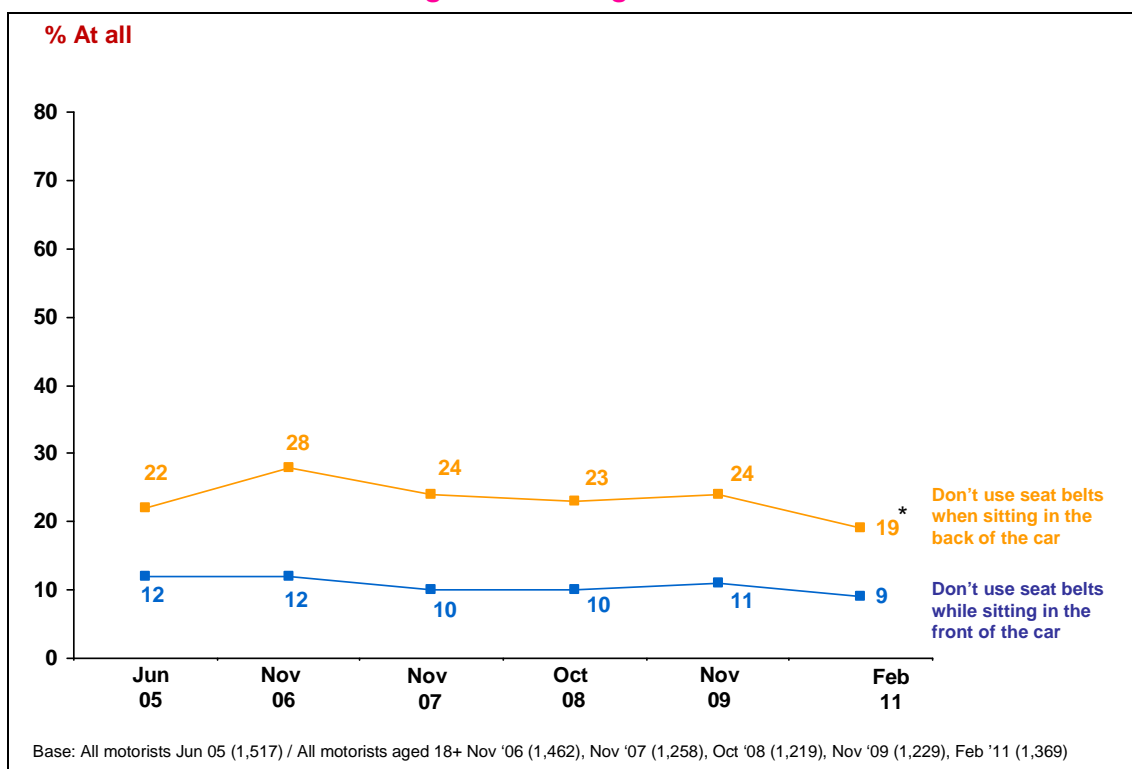


Using a mobile phone with the aid of a hands-free kit is becoming more common not only amongst respondents but also amongst people known to respondents. In 2011, seven in ten drivers (71%) said they know at least a few people who do this (up from 61% in the previous two years). The increase this year reflects a rise in the proportion of drivers saying that ‘most people they know’ do this (up from 10% in 2009 to 13% in 2011).

Half of motorists (50%) claimed to know at least a few people who use a mobile phone without a hands-free kit, while four in ten (41%) know people who text whilst driving. There have been no dramatic shifts in the perceived prevalence of either behaviour. However, compared to 2009 more motorists this year know ‘some people’ who do not use a hands-free kit (18%, up from 15% in 2009) or who text whilst driving (13%, up from 10% in 2009).

#### 6.1.4 Seat belt wearing

Since 2005, two questions have been asked to gauge how widely seat belts are used: one regarding the wearing of seat belts while sitting in the back of the car, and the other regarding seat belt usage in front seats. Data from these two questions appears in Chart 6h.

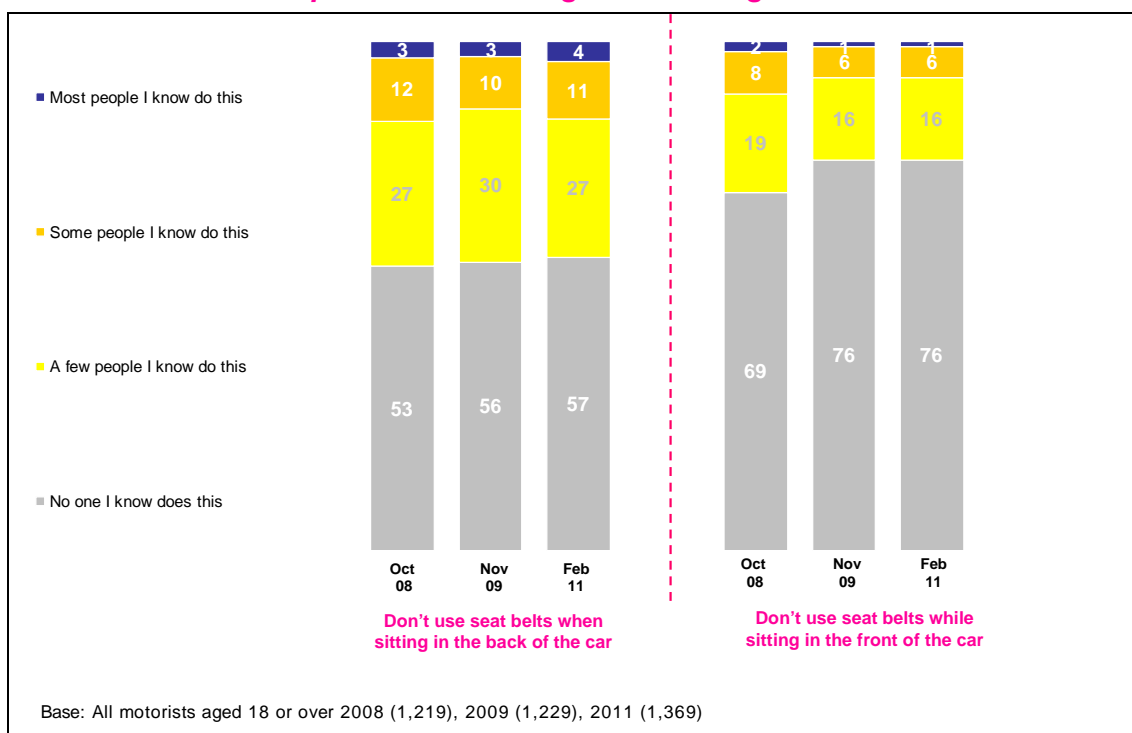
**Chart 6h – Prevalence of dangerous driving behaviour – seat belts**

This year saw a significant decrease in the proportion of drivers reporting that they do not use a seat belt in the back seat: the frequency fell to one in five (19%) after a period of three years of stability at around one in four. In 2011, those most likely to fail to wear a seat belt in the back of a car were BME drivers (49%), drivers who live in London (31%) or the South East (23%), and drivers with between three and six years of driving experience (26%).

The proportion reporting that they do not use a seat belt in a front seat has always been lower, and stable at around one in ten, and this remains the case in 2011 (9%). The subgroups which stood out with regards to seat belt usage in the back of a vehicle were no more likely than anyone else to avoid using seat belts in the front. Instead, those in social grade C2 (14%) and full-time male workers (14%) were more likely than the average motorist to admit to this. However, this behaviour was most common amongst young men: specifically, men under the age of 30 (17%), followed by men aged 30-44 (15%).

Motorists' perceptions of other people's usage of seat belts are shown in Chart 6i, along with back-data on perceptions from the previous two years. There is greater consistency between the last two waves in perceived prevalence than there is in actual prevalence.



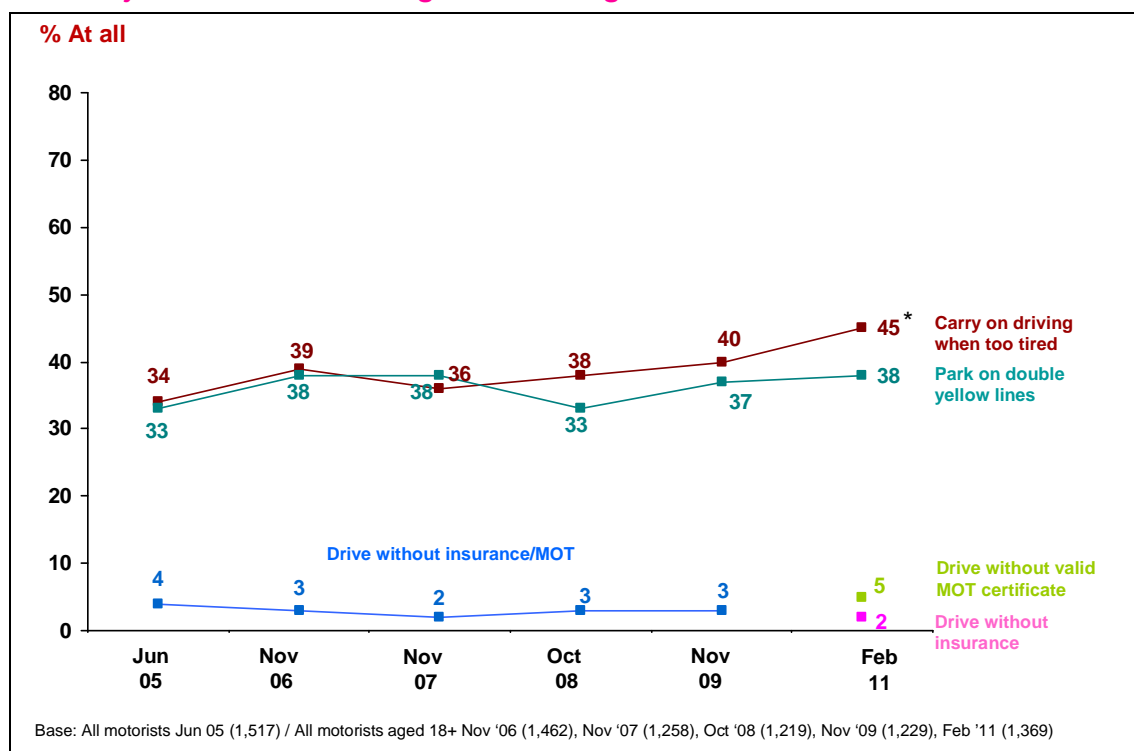
**Chart 6i – Perceived prevalence of dangerous driving behaviour – seat belts**

In 2011, two fifths of motorists (42%) reported knowing at least a few people who do not wear a seat belt whilst sitting in the back of the car, whilst one quarter (23%) know people who do this whilst sitting in the front. These proportions are consistent with those from 2009, and broadly similar to results from 2008.

### 6.1.5 Other behaviours

A range of other dangerous behaviours were also measured: driving when too tired, parking on double yellow lines and driving without insurance or MOT. Prior to 2011, driving without insurance or MOT was asked as a single behaviour, but this has been split into two distinct behaviours from 2011.

Chart 6j shows data on the stated prevalence of driving when tired and parking on double yellow lines. Since 2006, the frequency of both behaviours has fluctuated around two in five. It also shows the prevalence of driving without insurance or a valid MOT certificate, which historically has had a much lower prevalence.

**Chart 6j – Prevalence of dangerous driving behaviour – other**

2011 saw an increase in the proportion of motorists reporting that they carry on driving when too tired, with close to half admitting to this (45%, up from 40% in 2009). This is the continuation of a trend from 2007, when 36% of motorists reported carrying on driving when too tired. Several groups had a greater propensity than others to drive when tired: namely, men below the age of 45 (60%); those who commute to work (53%) or who drive as part of their job (55%); motorists whose mileage per year is medium (48%) or high (54%); those in social grades A and B (54%); those with 10-20 years of driving experience (56%); and motorists who are also cyclists (52%).

Just over a third of motorists (38%) acknowledged parking on double yellow lines. This level has remained constant over the years, apart from a temporary dip in 2008 when it fell to 33%. Parking on double yellow lines is common amongst some of the same groups as those who drive when tired: men below the age of 45 (50%); those who drive to and from work (42%) or who drive as part of their job (46%), and those whose annual mileage exceeds 10,000 (47%). However, there are some differences too, with motorists in social grade D more likely to park on double yellow lines (48%) than those in other social grades; similarly, BME drivers (50%) and those with under 20 years of driving experience (47%) have a higher than average likelihood of parking in this way.

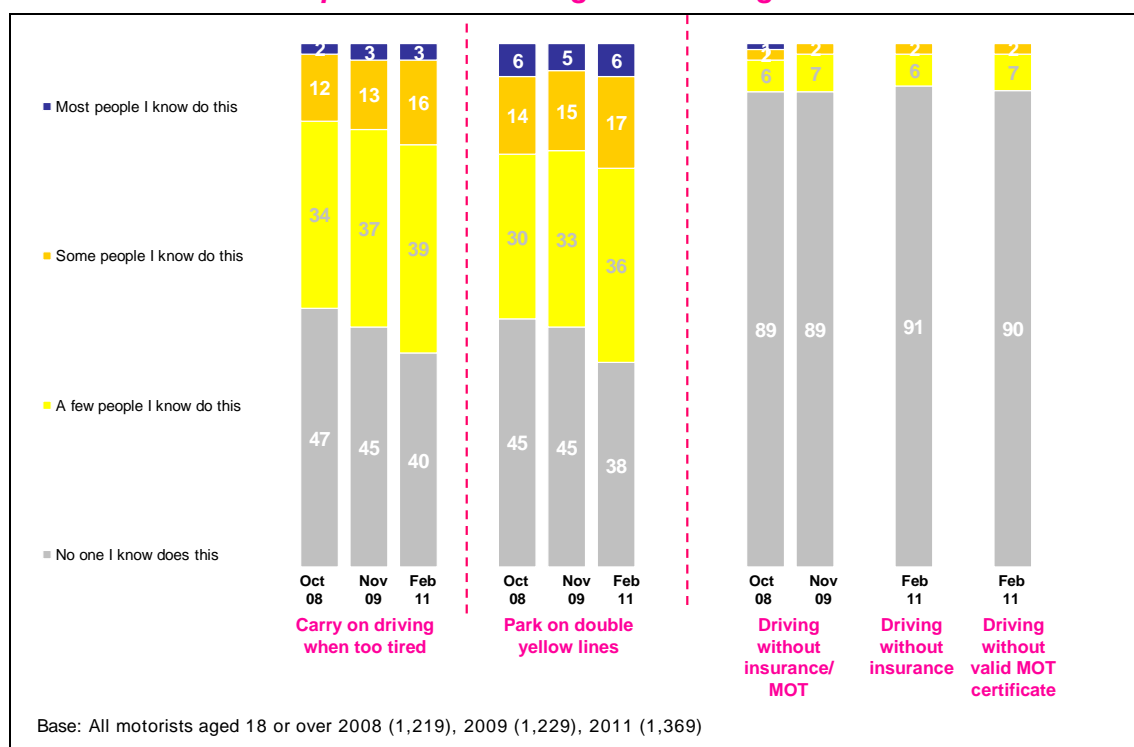
Only one in twenty (5%) admitted to driving without a valid MOT certificate, and even fewer admitted to driving without insurance (2%). These frequencies are broadly in

line with the frequency of 'driving without insurance/MOT', which was asked about in previous years (3% admitted to this in 2009). Future waves will show whether there is any substantial difference in the prevalence of the two separate misdemeanours.

Only one group of motorists had a higher than average likelihood of driving without a valid MOT certificate: men aged 30-44 (9%, compared with 5% overall). By contrast, a much wider range of social groups admitted to driving without insurance: men under the age of 30 (6%), drivers from Black or Minority ethnic groups (5%), drivers living in London (4%) or Wales (6%), and those who use a vehicle to commute to and from work (3%).

Motorists were also asked about other people's dangerous driving behaviours (Chart 6k).

**Chart 6k – Perceived prevalence of dangerous driving behaviour – other**



Almost three fifths (58%) said they know people who drive when tired. This level has risen year-on-year (48% in 2008, 53% in 2009), with increases among those who know 'some' and those who know 'a few' people who do this, in a pattern that mirrors the rise in motorists' self-reported tendency to drive when tired.

This year sees more motorists than ever before saying that they know people who park on double yellow lines (60%, up from 50% in 2008), with this increase largely coming from an increase in those who know 'a few' people who do this. Despite this, the self-reported prevalence of this behaviour did not rise in 2011.

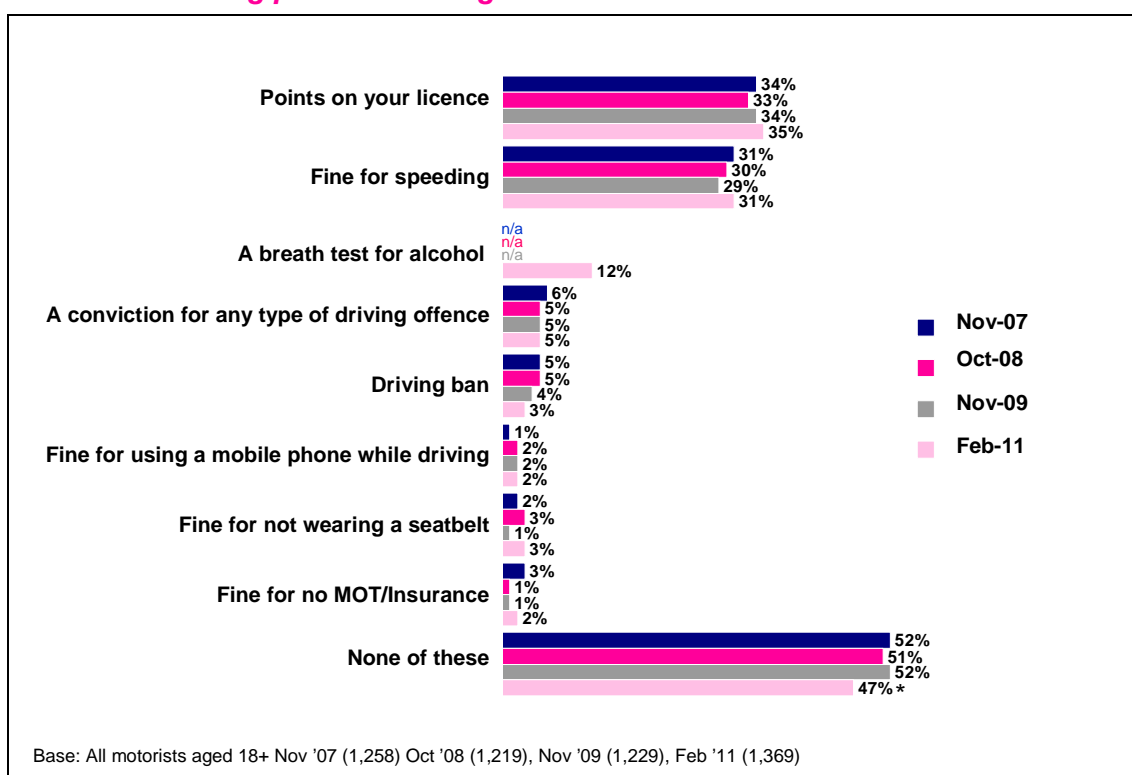
Less than one in ten drivers knew people who drive without insurance (8%) or without a valid MOT certificate (9%). The perceived prevalence of these two behaviours was asked about separately in 2011, but the results do not differ from those of previous years when the two measures were combined.

## 6.2 Driving related penalties

As part of the self completion section of the survey, all motorists aged 18 or over were asked to state which common driving penalties they had ever received, and which they had received more recently (in the last three years). The latter measure is perhaps more reliable, as people may forget penalties received far in the past. Both measures have remained stable since 2007, and we would not expect to see significant changes in reporting of these measures year on year.

In 2011, a further item: 'a breath test for alcohol' was added to this list. Although this is not actually a driving penalty, it is still an indicator of driving behaviour.

**Chart 6I – Driving penalties ever gained**



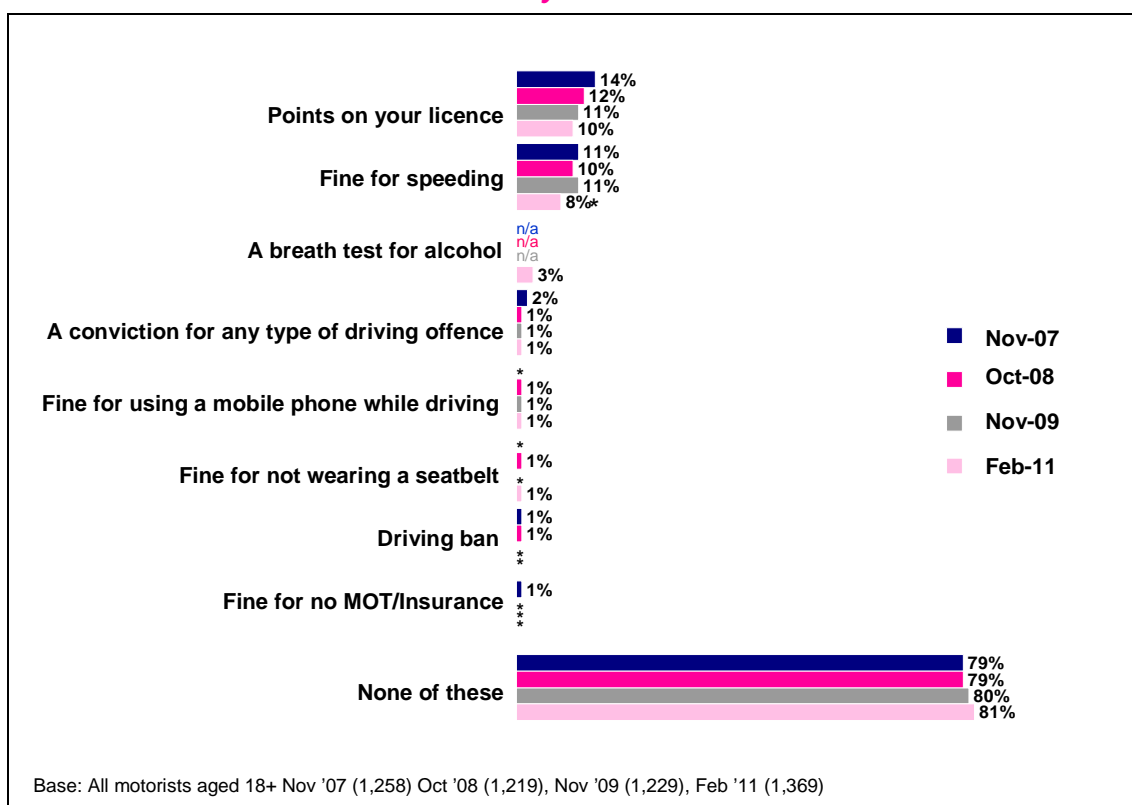
Almost half of motorists (47%) had not had any of the penalties on the list. This proportion is lower than in previous years, due to the inclusion of breathalysing as part of the list in 2011. Excluding being breathalysed, 47% of motorists had ever received at least one of the driving related penalties from the list. As in previous years, points on a licence was the most common of the penalties received (35%), closely followed by fines for speeding (31%). One in eight motorists (12%) had

experience of being breathalysed, while less than one in twenty had received any of the other penalties.

Men were almost twice as likely as women to have received a driving penalty (60% of men compared with 32% of women). Other motorists with a higher than average likelihood of having received a penalty were commuters (52%), those who drive as part of their job (58%), drivers who also cycle (53%), and drivers living in the North (59%). Moreover, people who have been alive longer have more opportunity to accrue penalties, so as one might expect, the likelihood of ever having had a penalty rises with age (from 33% amongst those below 30, to 56% amongst those aged 45-54). It is interesting therefore that likelihood of ever having had a penalty drops among the older age group (those aged 55+) to 47%.

Chart 6m shows the proportion of all adult motorists who have received the various penalties, or been breathalysed in the last three years.

**Chart 6m – Offences in the last three years**



Nearly one in six drivers aged 18 or above (16%) had either received a penalty or been breathalysed within the last three years. Excluding those who had only been breathalysed, 15% had received a driving related penalty in the last three years. Points on a licence and fines for speeding were the most common offences, committed by around one in ten drivers, while one per cent of drivers or fewer

reported receiving penalties for any of the other offences. Three per cent had experienced a breath test for alcohol in the last three years.

Twice as many men (19%) as women (9%) had received a driving penalty in the last three years, with men under the age of 45 (26%) more likely than older men (15%) to have experienced this. The same is true of breath tests for alcohol, with more men than women (4% compared with 1%) and more men under 45 than over 45 (7% compared with 2%) having had one in the last three years.

Other groups were also more likely than the average motorist to have received a driving penalty recently. These included drivers in social grade D (21%), those with an annual mileage of 10,000 or above (22%), commuters (19%), and those who drive for work (21%).

This picture has remained stable over time, the only notable difference being a drop in the proportion of drivers who have received speeding fines in the last three years (down from 11% in 2009 to 8% in 2011).

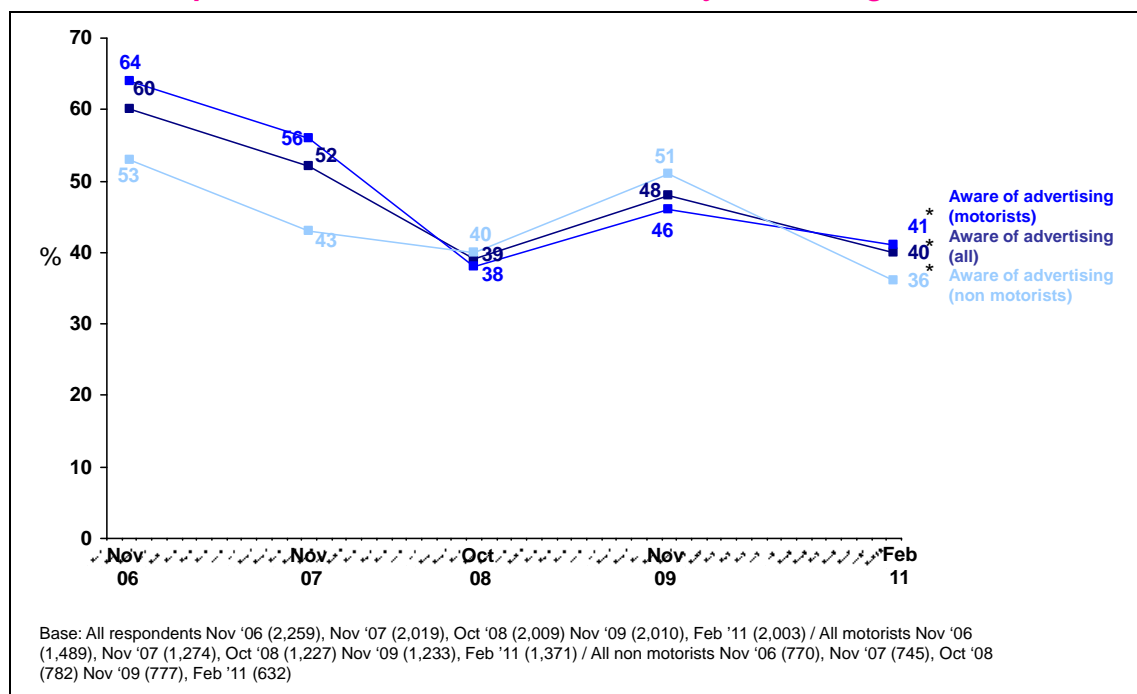
## 7. Awareness of, and attitudes towards, the THINK! brand

This section covers the awareness of, and attitudes towards, the THINK! road safety brand as a whole – the sum of its individual campaign parts.

### 7.1 Spontaneous awareness of advertising about road safety

As a spontaneous measure of THINK! road safety campaign activity, all respondents were first asked if they recalled seeing any advertising about road safety recently (Chart 7a). They were then asked who they thought produced the road safety advertising that they recalled seeing (Charts 7b and 7c).

**Chart 7a – Spontaneous awareness of road safety advertising**



Recall of road safety advertising declined sharply from its peak in 2006 (60% of all respondents) to the point in 2008 at which only four in ten (39% of all respondents) could recall such advertising. The figures for 2009 showed a significant increase in recall, returning almost to 2007 levels (48%), although this has fallen again in 2011 to four in ten (40%). This decline is to be expected, and reflects the extended period in 2010 where there was no THINK! campaign activity, and the heavily reduced activity (with no television advertising) in early 2011.

In 2011, recall by motorists was higher than recall by non motorists, a pattern previously observed in 2006 and 2007 (range of difference = 7-9 percentage points in

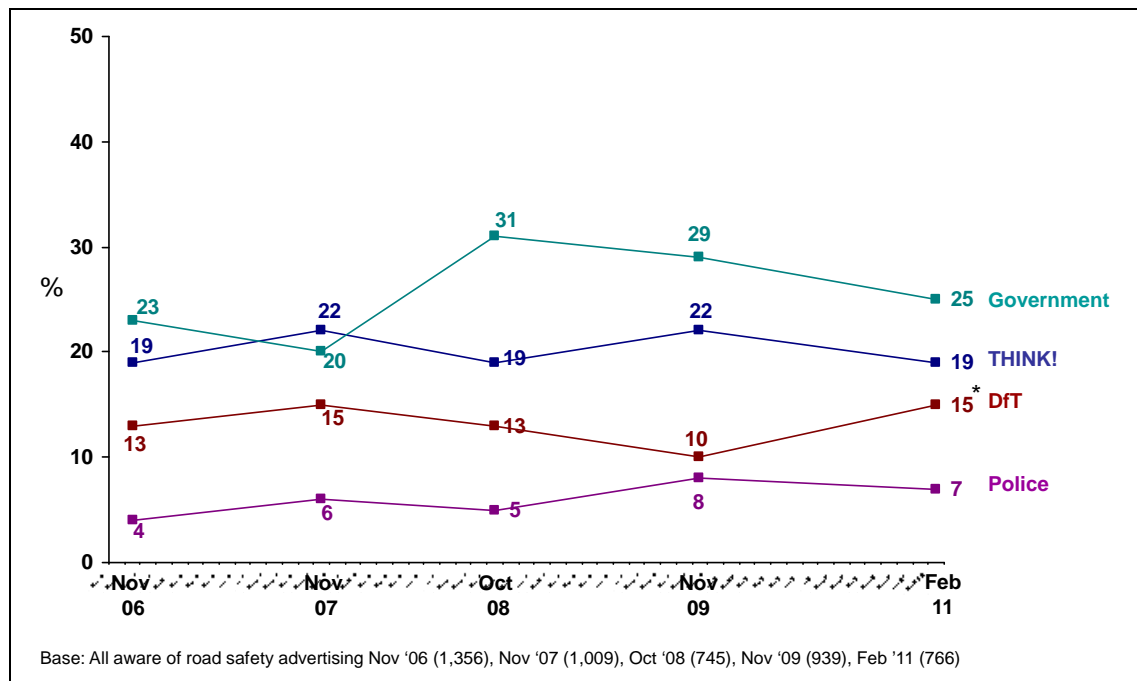
2006-2007, 5 percentage points in 2011). In 2009, this pattern was reversed, with non motorists exhibiting slightly higher levels of recall than motorists.

Motorists who drive over 10,000 miles in a typical year were more likely to recall having seen advertising (50%) than those who drive fewer than 3000 miles (31%).

Male motorists were more likely to recall having seen advertising than females (46% compared with 36%), with this trend being particularly driven by young male motorists aged 16 to 29 (60%).

Respondents were asked who they thought was responsible for the advertising that they recalled, the findings of which are shown below in Chart 7b.

**Chart 7b – Spontaneous awareness of source of road safety advertising (all respondents)**



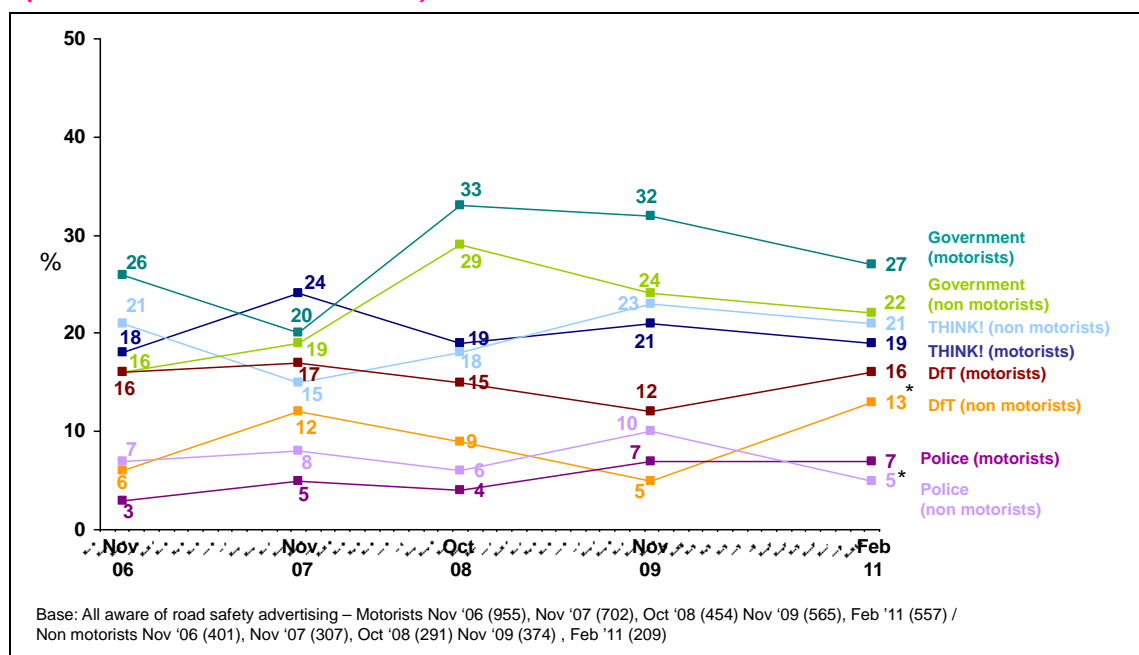
Since 2006 the two leading responses for perceived responsibility for advertising were the Government and THINK!. In the 2006 and 2007 surveys the proportion of respondents making these two suggestions was roughly similar, around the 20% mark, but in 2008 the proportion specifying the Government increased dramatically. The findings for 2011 show that, as in previous waves, Government is the leading perceived source of the advertising, accounting for around a quarter of suggestions (25%). This proportion is slightly lower than in 2009, although this is not a significant decrease. Those who cite that the advertising was produced by THINK! remain steadily at around one in five (19% in 2011).



The proportion of respondents mentioning the Department for Transport as the source of the advertising was consistently in the range 13% to 15% until 2009 when it declined to 10%. In 2011, this proportion increased again to 15%, in keeping with pre-2009 levels. Men were more likely than women to attribute the advertising to the Department of Transport (18% compared with 11%).

The proportion suggesting that the advertising is the responsibility of the police has remained steady at 7 per cent, having been consistently in the range four to six per cent before 2009 when it increased to a peak of 8%.

**Chart 7c – Spontaneous awareness of source of road safety advertising (motorists vs. non motorists)**



Attribution of the campaign to the Government has grown amongst both motorists and non motorists, with a particularly sharp rise between 2007 and 2008. This increase started to fall back in 2009; a trend which has continued in 2011.

Attribution of the campaign to THINK! has been fairly consistent, notwithstanding a divergence in 2007, when the figure for motorists peaked at 24%, whilst the same figure amongst non motorists fell to a low point of 15%. If we exclude 2007 from the analysis, we can see that attribution to THINK! among both groups has been within a relatively narrow band between 18% and 23% on surveys in other years and this does not differ in 2011.

In 2009, motorists (12%) were twice as likely to think that the Department for Transport was responsible for road safety advertising as were non motorists (five per cent), with a similar sized gap between the two groups in years prior to this.

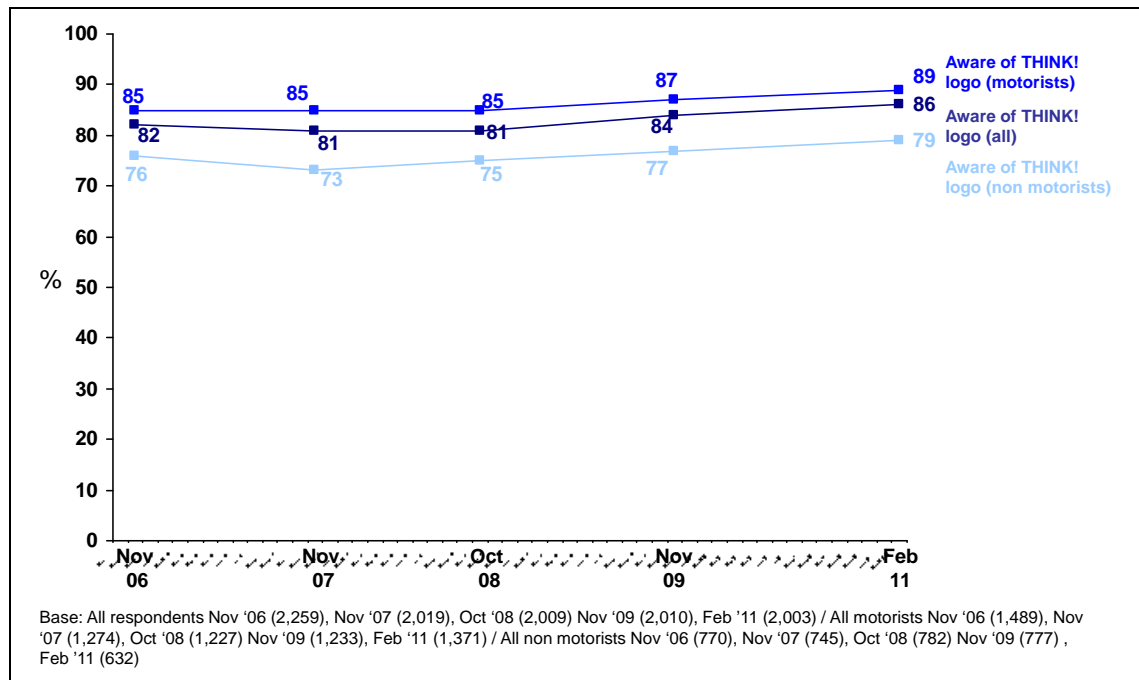
However, this difference was no longer apparent in 2011, with motorists and non motorists attributing advertising to DfT at an equal level (16% and 13% respectively).

Likewise, non motorists were previously slightly more likely than motorists to think that the police were responsible, but in 2011 these levels have become roughly equal (5% and 7% respectively)

## 7.2 Prompted awareness of the THINK! logo

As a measure of awareness of the THINK! brand, all respondents were shown the THINK! logo on the screen of the laptop and then asked if they had seen it before (Chart 7d).

**Chart 7d – Prompted awareness of THINK! logo**



When prompted, over eight in ten (86%) respondents recognised the THINK! logo, which appears to be a steadily increasing trend since 2006.

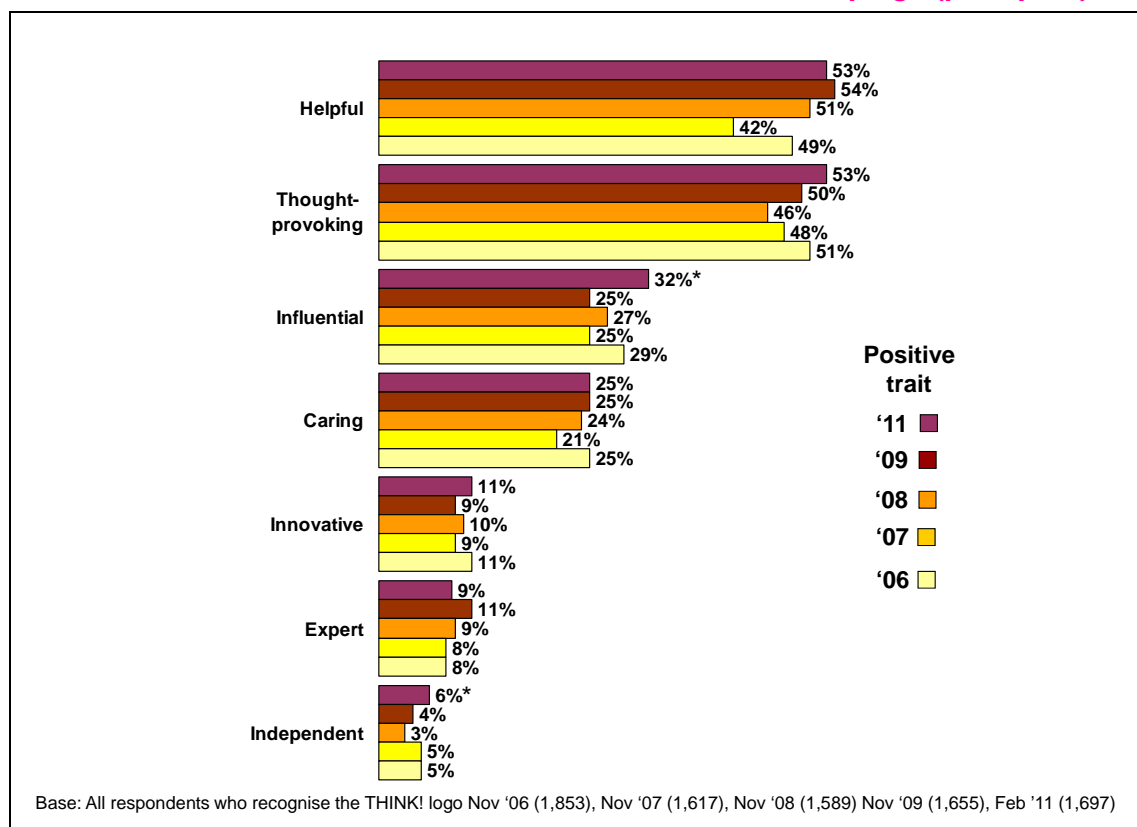
Motorists were more likely to recognise the THINK! logo than non motorists (89% compared with 79% in 2011). This finding is consistent with previous waves. Also consistent with previous waves, motorists who travelled further over the course of the year were more likely to recognise the logo (95% of those who travelled 10,000+ miles in a year, falling to 81% of those who had driven for up to 3,000 miles) as were commuter drivers or those who drove for work (95% and 96% respectively, compared with 89% of leisure drivers).

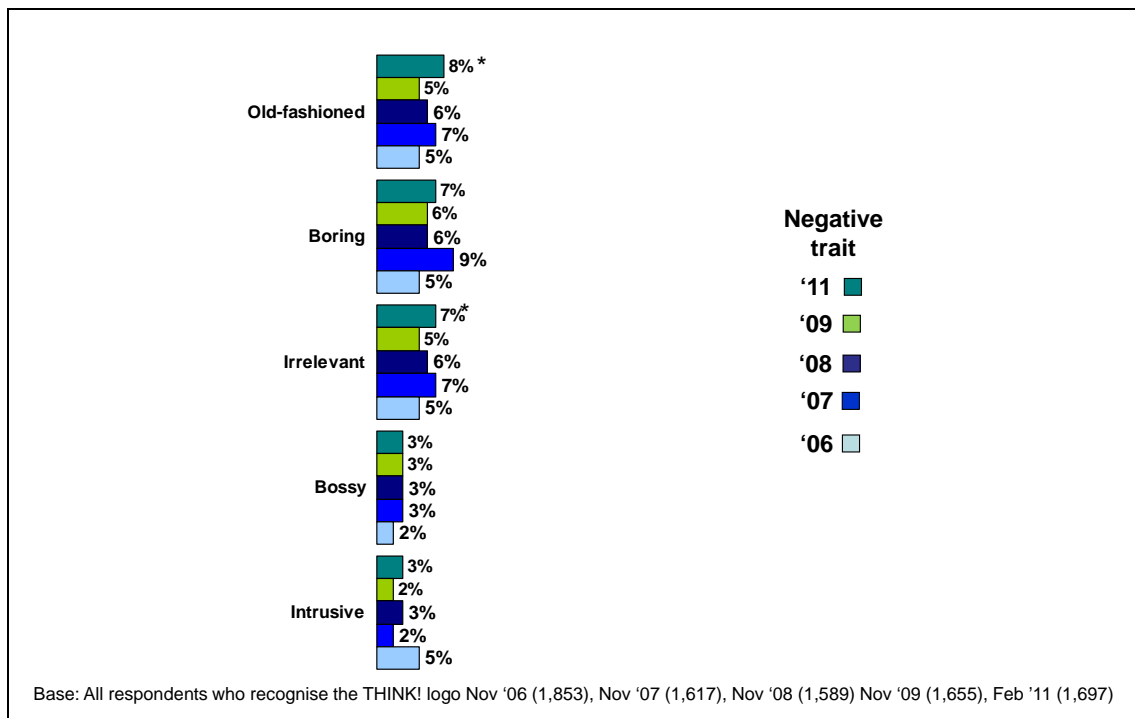
As in previous waves, among respondents overall the level of recognition declines among those aged 55 and older, with 92% of 16-54s recognising the logo, compared with 74% of those aged 55 and over. Men were more likely to have seen the logo than women (88% compared with 84%).

### 7.3 THINK! brand personality

In order to measure the perceived image, or personality, of the THINK! brand, all respondents who recognised the THINK! logo were shown a list of a words (both favourable and unfavourable) and were asked to select which they felt best described the THINK! campaign. Positive descriptions are shown on Chart 7e and negative descriptions on Chart 7f. As in previous years, the overall response to the campaign was very positive.

**Chart 7e – Positive words used to describe the THINK! campaign (prompted)**



**Chart 7f – Negative words used to describe the THINK! campaign (prompted)**

The descriptions chosen by respondents recognising the THINK! logo have been quite consistent over the years in their relative proportions. "Helpful" and "thought-provoking" are the two leading choices, each chosen by around half of respondents in every survey, with 53% of people giving each response in 2011. Young people aged between 16 and 29 were more likely than older respondents to say "helpful" (61%). In previous years this was driven by young men, but in 2011, women aged 16-29 also mentioned this word in higher proportions than those aged 30 and over.

The proportion saying that THINK! is "influential" increased to a third in 2011 (32%) from a quarter in 2009 (25%), while the number saying it is "caring" (25%) was at a similar proportion to previous waves. We have noted at several points in this report the tendency for young men to report relatively high levels of risk taking behaviour, and it is therefore perhaps surprising to note that men aged 16-29 were also much more likely than average to choose to describe the campaign as "influential" (46%) and "caring" (33%).

As in previous years, each negative trait was mentioned by a low proportion of respondents. "Old-fashioned" was mentioned by eight per cent, and "irrelevant" was mentioned by seven per cent, although both of these words have shown small but significant increases at the latest wave (from 5% for each). Men were more likely to say that THINK! is "irrelevant" (8% compared with 5% of women), particularly men over the age of 55 (13%). "Boring" was mentioned by seven per cent, and "bossy" and "intrusive" by just three per cent.

In Table 7g (below) we compare the use of these descriptions by motorists and non motorists.

**Table 7g – Words to describe the THINK! campaign - prompted (motorists vs. non motorists)**

	Nov 07		Oct 08		Nov 09		Feb 11	
	Motorist (1,081) %	Non Motorist (536) %	Motorist (1,020) %	Non Motorist (569) %	Motorist (1,070) %	Non Motorist (585) %	Motorist (1,209) %	Non Motorist (488) %
Thought-provoking	50	44	48	40	56	36	55	48
Helpful	40	45	50	54	54	55	49	62
Influential	24	27	26	28	24	26	33	29
Caring	19	28	22	29	22	31	24	29
Innovative	9	9	9	12	9	8	11	11
Expert	7	8	8	12	11	13	9	8
Old-fashioned	7	7	6	6	5	3	9	7
Irrelevant	8	5	6	5	6	5	7	7
Boring	9	8	6	5	7	5	7	6
Independent	4	7	2	3	3	6	5	6
Intrusive	2	3	3	4	2	3	3	3
Bossy	3	3	2	4	3	3	2	3

Over the last four surveys motorists have been consistently more likely to describe the campaign as "thought-provoking" than non motorists (55% compared with 48% in 2011), although the extent of this difference in 2011 was less pronounced than in 2009 and more in line with the two earlier years.

Conversely, non motorists have tended to be more likely than motorists to choose "helpful", a difference that has become more marked in 2011 (62% compared with 49% of motorists) than in 2009 when it had reduced to a negligible level.

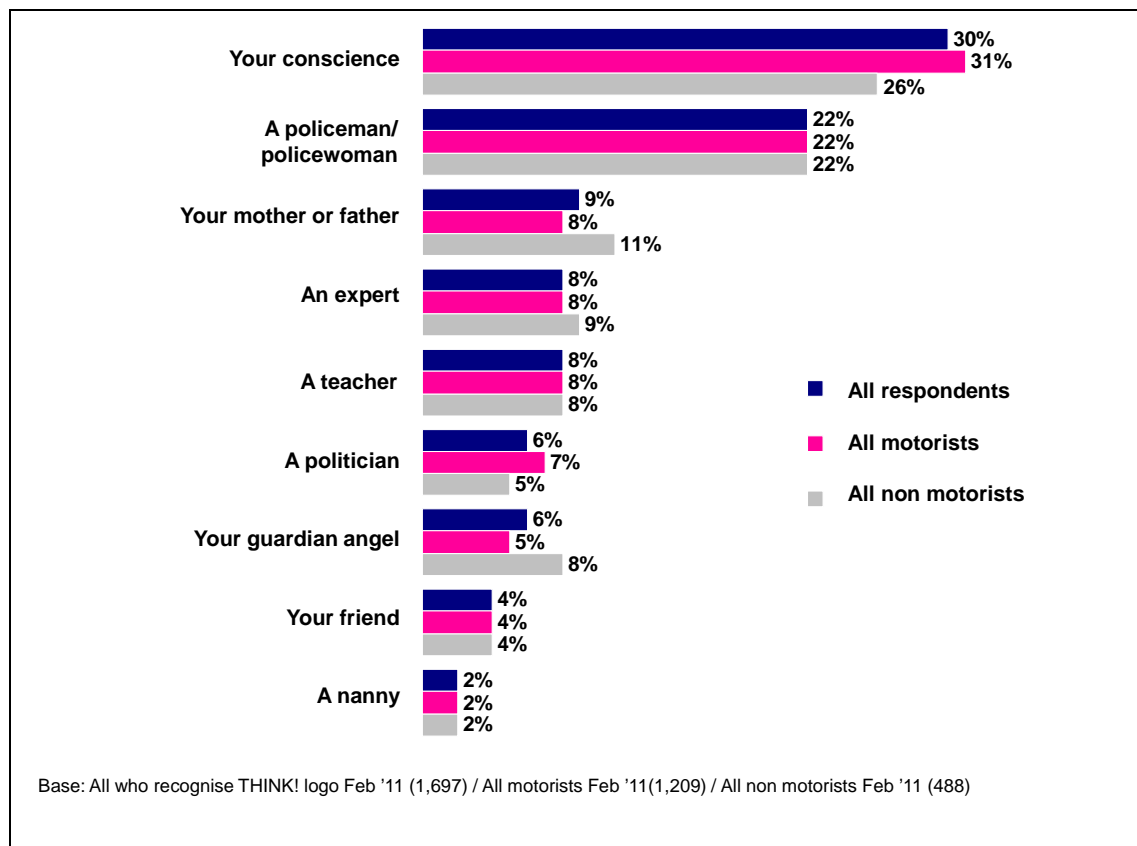
There has been little difference between the two groups in choice of "influential" as a description, although as seen above the proportion of all respondents describing THINK! as being influential increased in 2011, driven by an increase among motorists (33% in 2011 compared with 24% in 2009). Non motorists have been consistently more likely than motorists to describe the campaign as "caring" (29% compared with 24% in 2011).

There are no other large or significant differences between these two groups.

In 2011, an additional question was included in order to provide further understanding of the public's perceptions of the THINK! brand. This question asked

respondents to consider what type of person THINK! would most be like, from a prompted list (Chart 7h).

**Chart 7h – What sort of person THINK! would most be like (prompted)**



The most frequent response, by three in ten respondents (30%) was that THINK! would be most like their conscience. As the subject matter of THINK! campaigning is more relevant to motorists' personal experiences and actions, it is unsurprising that this group were more likely than non motorists to respond that THINK! is like their conscience (31% compared with 26%). Women were more likely than men to say that it would be most like their conscience (34% compared with 26%).

Two in ten said that THINK! would be like a policeman or policewoman, while around one in ten likened THINK! to their mother or father (9%), an expert (8%) or a teacher (8%). Around one in twenty thought THINK! was like a politician, a guardian angel or a friend, and just 2% made the comparison between THINK! and a nanny.

A higher proportion of non motorists than motorists likened THINK! to a guardian angel (8% compared with 5% of motorists). There were no other differences between the two groups.

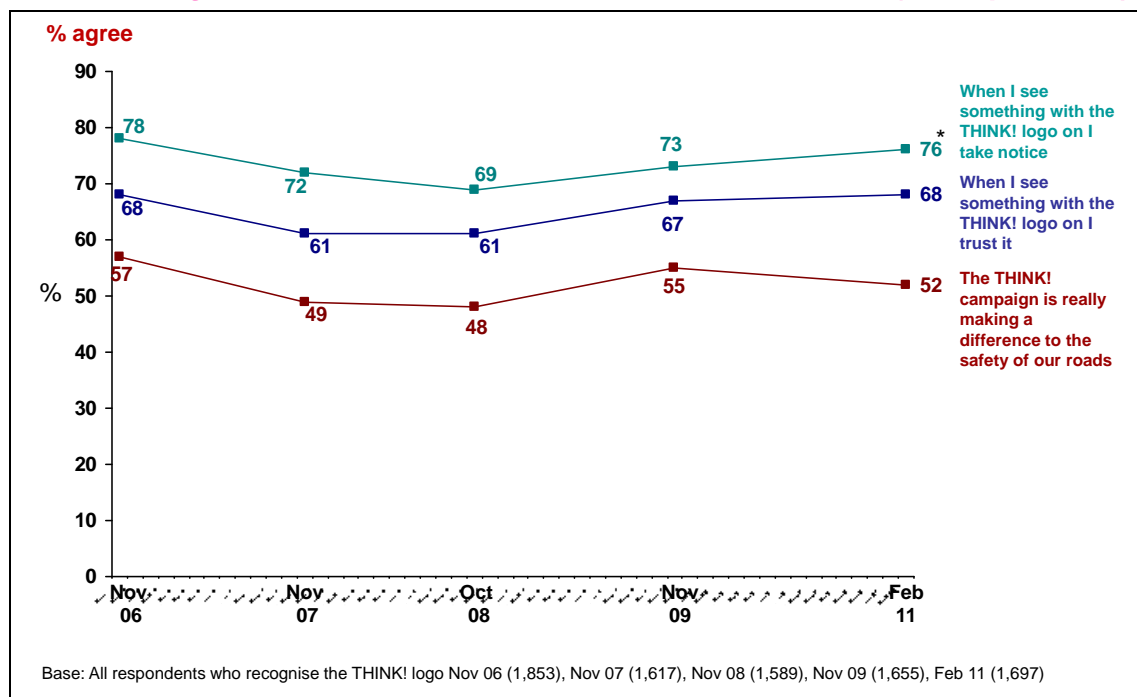
Younger respondents were more likely than older people to liken THINK! to a policeman or woman, with three in ten of those aged 16 to 29 thinking this (29%)

compared with two in ten in other age groups. People in lower social grades were also more inclined to think THINK! would be most like a policeman or policewoman (24% of C2DEs compared with 20% of ABC1s) or their mother or father (12% of C2DEs compared with 7% of ABC1s), while those from higher social grades were more likely to say that THINK! is most like their conscience (34% of ABC1s compared with 25% of C2DEs).

#### 7.4 Attitudes towards THINK! and road safety advertising

As a measure of attitudes towards the THINK! campaign, respondents who recognised the THINK! campaign logo were then shown a series of attitudinal statements and asked whether they agreed or disagreed with each (Charts 7i and 7j). These statements were designed to measure brand affinity, persuasion and momentum.

**Chart 7i – Agreement with statements about the THINK! brand (all respondents)**

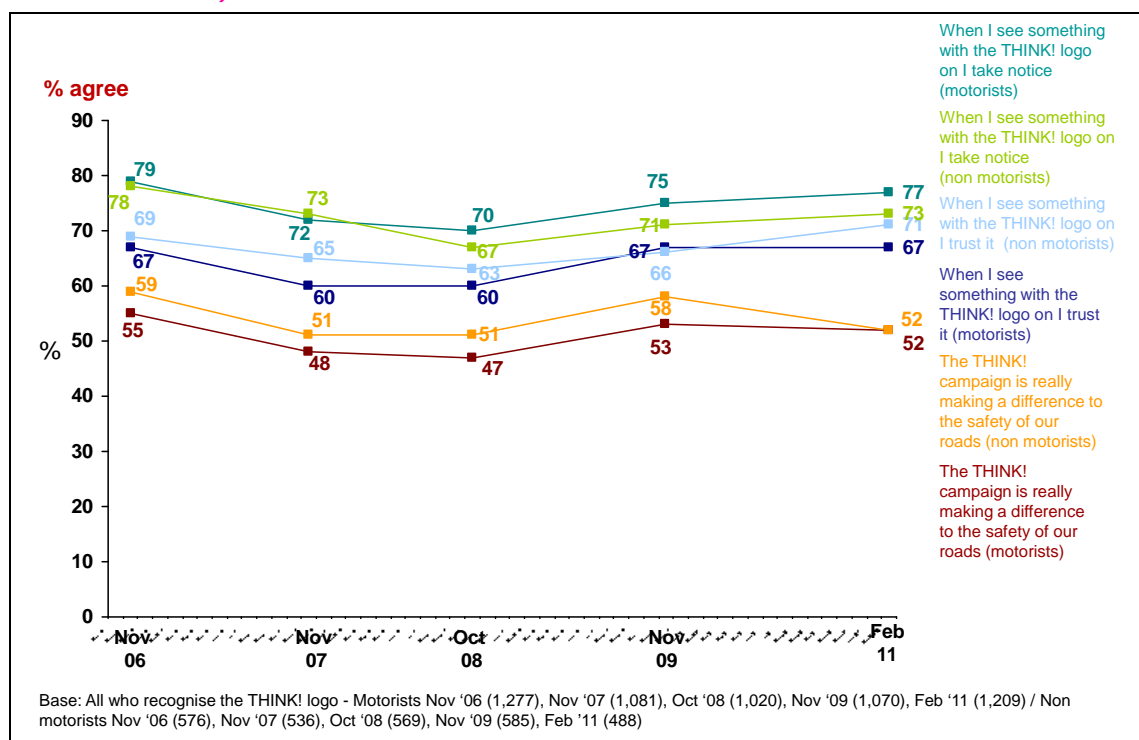


The trend across all three statements is remarkably consistent, with the highest levels of agreement recorded in 2006, dipping in 2007 and 2008 before recovering in 2009. Levels in 2011 remain broadly consistent with those found in 2009, although the statement "when I see something with the THINK! logo on I take notice" increased by four percentage points in 2009 to 73%, and has increased further in 2011 to 76%. The statement "when I see something with the THINK! logo on I trust it" remains consistent at 68%, equal with its previous peak in 2006. Half agreed with the statement "the THINK! campaign is really making a difference to the safety of our roads" (52%), level with 2009, although still below the 57% seen at its peak in 2006.

It is interesting to note that some of the highest levels of agreement with the "trust" and "making a difference" statements came from young adults, and particularly young males. For example on the "trust" statement, 84% of males aged 16-29 agreed, compared with just 66% of people aged 55+. There were also particularly high levels of agreement from black and minority ethnic respondents, with 82% agreeing with the "trust" statement, compared with just 67% of white respondents.

Chart 7j (below) examines these trends by comparing responses from motorists with those from non motorists.

**Chart 7j – Agreement with statements about the THINK! brand (motorists vs. non motorists)**

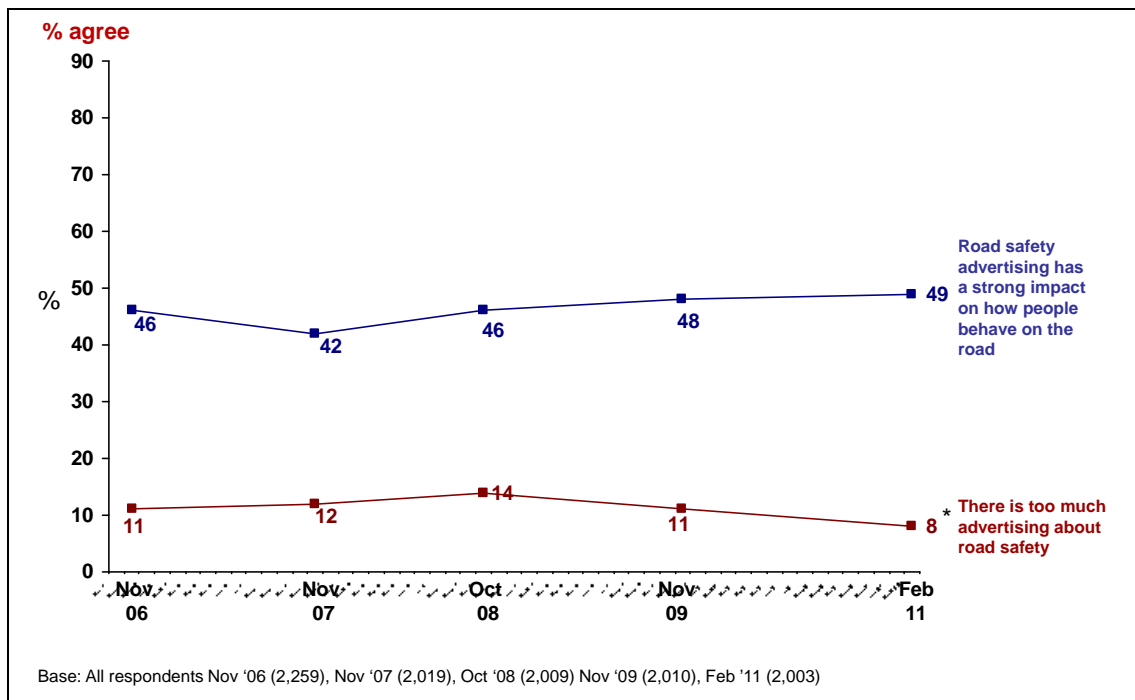


Levels of agreement from motorists and non motorists were broadly similar on individual statements, and have remained so on all surveys.

Since 2006, the "making a difference" statement had exhibited a consistent pattern, with non motorists more likely to agree than motorists, by between three and five percentage points on each occasion (58% to 53% in 2009). However, in 2011 there is no longer any difference between motorists and non motorists (52% for each).

The next two attitudes statements were designed to test perceptions around the impact of road safety advertising, and the view that there was too much road safety advertising. Findings are shown in Chart 7k and 7l.



**Chart 7k – Agreement with statements about road safety (all respondents)**

Half of respondents (49%) agreed that road safety advertising has a strong impact on how people behave on the road. This figure is consistent with 2009, although this has generally shown a gradual rise in agreement since 2007, when 42% of respondents agreed with this.

Notably there were high levels of agreement from respondents who had less than three years driving experience (64%). Even respondents with previous driving penalties were in line with the views of other respondents (between 44% and 53% agreeing with the statement, with slight variation according to penalty type). Those who had previously had a driving conviction or ban were least likely among this group with driving penalties to agree with this statement (44%).

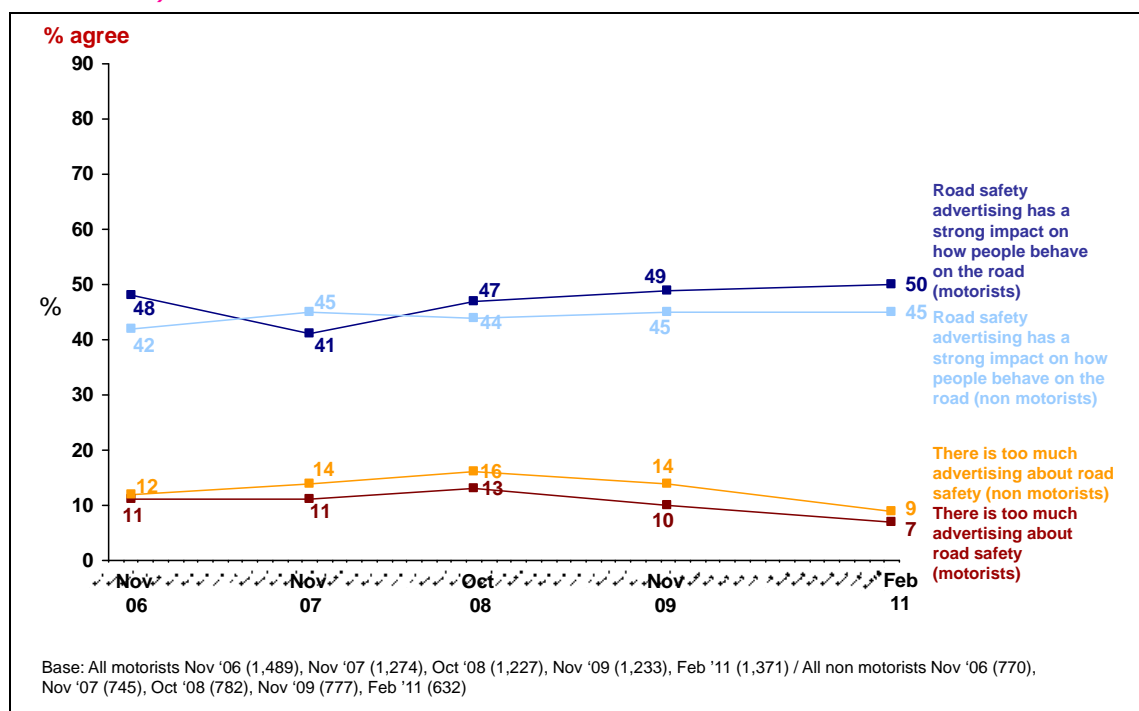
Around three in ten respondents disagreed that road safety advertising has a strong impact on how people behave on the road (31%), and higher levels of disagreement came from non motorists (35%).

Less than one in ten respondents (8%) thought that there was too much advertising about road safety, a reduction from (11%) in November 2009. The February 2011 survey followed a period of greatly reduced campaign activity for THINK! so it is not unexpected that agreement with this statement would reduce, although this is broadly in line with the ongoing trend (with the 2009 figure of 11% representing a small fall from 2008).

The highest levels of agreement that there is too much road safety advertising were found among those aged 55 and over (12%) and black and minority ethnic respondents (18%). Those with over 20 years driving experience were more likely to agree that there is too much road safety advertising (9%) compared with those with 6 years experience or less (1%). Three quarters of people disagreed that there is too much advertising (74%).

Chart 7I (below) examines the responses to these questions from motorists and non motorists.

**Chart 7I – Agreement with statements about road safety (motorists vs. non motorists)**



The trend lines show that there is little difference between the opinions of motorists and non-motorists on these issues.

Motorists (50% agree in 2011) have tended to be slightly more positive about the value of road safety advertising than non motorists (45% agree in 2011), though the reverse was true just once, in the 2007 survey. Non motorists were previously slightly more likely to believe that there is too much advertising about road safety than were motorists, although this was no longer a significant difference in 2011.

## Appendix A: Sampling method

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The sampling technique used in this survey is a tightly controlled form of random location sampling developed within legacy BMRB, and is the basis of most consumer surveys which TNS-BMRB conducts.

The aim of random location sampling is to eliminate the more unsatisfactory features of quota sampling without incurring the cost and other penalties involved in conducting surveys according to strict probability methods.

One of the principal advantages of probability techniques of sampling is that selection of respondents is taken from the hands of interviewers. In conventional quota sampling, on the other hand, interviewers are given quotas to fill, usually from within specified administrative areas. When, for example, an interviewer is asked to complete a quota of AB respondents, she will tend to go to a part of the district where she knows such individuals to be available. AB individuals living in mixed social class areas will have little chance of inclusion. This and similar defects lead to biases which are concealed by superficial agreements between sample profiles and accepted standard statistics.

The principal distinguishing characteristic of random location sampling, as operated by TNS-BMRB, is that interviewers are given very little choice in the selection of respondents. Respondents are drawn from a small set of homogenous streets, selected with probability proportional to population after stratification by their ACORN characteristics and region. Quotas are set in terms of characteristics which are known to have a bearing on individuals' probabilities of being at home and so available for interview. Rules are given which govern the distribution, spacing and timing of interviews.

The sample of areas takes as its universe all sample units (groups of Census 2001 Output Areas, on average, 300 households) in Great Britain. Output areas are stratified in the following manner:

1. Standard Region
2. Within Standard Region - by Acorn type
3. Within Standard Region by County and ITV Region

Thus, the design is single stage, using direct selection of appropriate groups of Output areas, rather than taking streets at random from larger units such as wards or parishes.

## Appendix B: Weighting procedures

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The data are weighted to ensure that demographic profiles match those for all adults in Great Britain aged 16 or over. A rim weighting technique is used in which target profiles are set for eight separate demographic variables. The computer system then allocates a weight to each individual such that the overall composition of the sample is balanced in terms of the targets set.

The actual weights applied thus vary slightly between surveys; precise figures for specific cases are available from TNS-BMRB if required.

### Target Weights Applied

#### Sex 1

	%
Men	48.64
Women without children	32.58
Women with children	18.78

#### Sex 2

	%
Men working full time	24.49
Men not working full time	24.15
Women working at all	24.42
Women not working at all	26.94

#### Age within Sex

	Men	Women
	%	%
16-24	7.78	7.37
25-34	7.92	7.88
35-44	8.97	9.13
45-54	8.10	8.31
55-64	7.13	7.42
65+	8.74	11.25

**Social Grade within Sex**

	Men	Women
	%	%
AB	13.62	13.07
C1	13.51	15.69
C2	11.22	9.81
D	7.16	7.92
E	3.13	4.87

**Standard Region**

	%
Scotland	8.69
North West	10.75
North	5.22
Yorkshire/Humberside	8.72
East Midlands	7.50
East Anglia	3.97
South East	19.59
Greater London	12.66
South West	8.86
Wales	5.06
West Midlands	8.98

*(Source of profile data: BMRB Target Group Index, 2010 and NRS, 2010)*

## Appendix C: Questionnaire

	Question	Base
	<p>We are conducting an important survey about road safety. It doesn't matter whether or not you drive a car or other vehicle, whether you only use a bicycle, or if you're more frequently a pedestrian or a passenger in other people's cars. We are interested in hearing what <u>you</u> think.</p> <p>IF ASKED: The survey is being carried out for the Department for Transport</p>	
	<p>What was your age last birthday?</p> <ul style="list-style-type: none"> <li>• Numeric (16-98)</li> <li>• Refused</li> </ul>	All Respondents
	<p>RESPONDENT AGE WAS NOT GIVEN. PLEASE ESTIMATE AGE GROUP AND CODE BELOW</p> <ul style="list-style-type: none"> <li>• 15-19</li> <li>• 20-24</li> <li>• 25-34</li> <li>• 35-45</li> <li>• 45-54</li> <li>• 55-64</li> <li>• 65 or over</li> </ul>	All Respondents who refused to give their age
1	<p>In a typical week, how many hours do you spend doing each of the following?</p> <p>SHOW SCREEN</p> <p>INTERVIEWER: IF NECESSARY SAY: "Please think about the last 3 months."</p> <p>INTERVIEWER: PLEASE ROUND ANSWER TO NEAREST HOUR</p> <ul style="list-style-type: none"> <li>• Less than 1 hour</li> <li>• 1 - 2 hours</li> <li>• 3 - 5 hours</li> <li>• 6 - 9 hours</li> <li>• 10 - 14 hours</li> <li>• 15+ hours</li> <li>• None</li> <li>• Don't Know</li> </ul> <p>This question is repeated for the following loop values:</p> <ul style="list-style-type: none"> <li>- Driving a car as part of my job</li> <li>- Driving a car to and from work</li> <li>- Driving a car for other reasons</li> <li>- Driving a van/lorry</li> <li>- Riding a motorcycle/scooter/moped</li> <li>- Riding a bicycle</li> <li>- Travelling in a car as a passenger</li> </ul>	All Respondents

	- Walking on the pavement/road	
2	<p>On average, how many miles do you drive in a year? Please include all miles driven for personal and work purposes, if appropriate. (SINGLE CODE)</p> <p>SHOW SCREEN</p> <ul style="list-style-type: none"> <li>• Up to 3000 miles a year</li> <li>• 3001 - 5000</li> <li>• 5001-10,000 miles a year</li> <li>• More than 10,000 miles a year</li> <li>• Don't know</li> </ul>	All motorists (all who selected codes 1/2/3/4/5 at Q1)
3	<p>How would you describe the area you live in? (SINGLE CODE)</p> <p>SHOW SCREEN</p> <ul style="list-style-type: none"> <li>• <del>Countryside</del></li> <li>• <del>Village</del></li> <li>• <del>Small town</del></li> <li>• <del>Outskirts of large town or city</del></li> <li>• <del>Centre of large town or city</del></li> </ul>	All respondents
4	<p>How frequently do you make the following type of journeys by motor vehicle?</p> <ul style="list-style-type: none"> <li>• 5+ times per week</li> <li>• 2-4 times per week</li> <li>• Once a week</li> <li>• Once a month</li> <li>• Less often</li> <li>• Never</li> <li>• Don't know</li> </ul> <p>a) Long journeys i.e. 50+ miles b) Journeys involving motorway driving c) Journeys to and from work d) Journeys as part as my actual job e) Journeys after dark f) Journeys with passengers g) Journeys on country roads h) Journeys to and from pubs/restaurants i) Short local journeys</p>	<p>All motorists (all who selected codes 1/2/3/4/5 AND who drive between "less than one hour" to "15+ hours" at Q1 (excludes those who say 'none' at Q1)</p> <p>Question asked of all drivers but tables spec'd to show only car/van/lorry drivers</p>
5	<p><del>Which of these types of vehicles do you drive in a typical week?</del></p> <p><del>(MULTICODE)</del></p> <p><del>SHOW SCREEN — CODE ALL THAT APPLY</del></p> <ul style="list-style-type: none"> <li>• <del>Estate</del></li> <li>• <del>Saloon</del></li> <li>• <del>Sports (cabriolet/ coupe)</del></li> <li>• <del>MPV / People carrier</del></li> <li>• <del>4X4</del></li> <li>• <del>Hatchback</del></li> <li>• <del>Van</del></li> <li>• <del>Lorry / HGV</del></li> <li>• <del>Other</del></li> <li>• <del>Don't know</del></li> <li>• <del>None of the above</del></li> </ul>	<p><del>All motorists (all who selected codes 1/2/3/4/5 at Q1)</del></p> <p>Reintroduced in 2009</p> <p><del>Question asked of all drivers but tables spec'd to show only car/van/lorry drivers</del></p>

6	<p><del>Thinking about the car/van you use most often, approximately how old is this? (SINGLE CODE)</del></p> <ul style="list-style-type: none"> <li><del>• Less than 3 years old</del></li> <li><del>• 3 to 6 years old</del></li> <li><del>• 6 to 10 years old</del></li> <li><del>• More than 10 years old</del></li> <li><del>• Don't know</del></li> </ul>	<p>All car/van/ lorry drivers at Q1 = 1/2/3/4</p> <p>Reintroduced in 2009</p>
7	<p>I would now like you to think about road safety. Which of the issues below do you consider to be the most important issues that the Government should address to improve road safety? Please pick your top three.</p> <p>SHOW SCREEN – CODE TOP THREE IN ORDER RANDOMISE (to match previous surveys)</p> <ul style="list-style-type: none"> <li>• Drink driving</li> <li>• Drug driving</li> <li>• Speeding</li> <li>• Use of mobile phones without hands free kit</li> <li>• Use of mobile phones with a hands free kit</li> <li>• Not wearing seatbelts</li> <li>• Not using child restraints</li> <li>• Child road awareness</li> <li>• Driving while tired</li> <li>• Motorcycle accidents</li> <li>• Tail gating</li> <li>• Road rage</li> <li>• Careless driving</li> <li>• <b>Cycling safety</b></li> <li>• Other (specify)</li> <li>• None</li> <li>• Don't know</li> </ul>	All Respondents
8	<p>To what extent would you agree or disagree that the following behaviours are dangerous?</p> <p>IF RESPONDENT ASKS FOR 'HANDS – FREE' DEFINITION, PLEASE USE THE FOLLOWING: "Any device that enables you to answer or speak on the phone without actually holding the phone in your hand"</p> <p>IF NECESSARY SAY: "To what extent do you agree or disagree that this behaviour is dangerous?"</p> <ul style="list-style-type: none"> <li>• Agree completely</li> <li>• Agree somewhat</li> <li>• Agree slightly</li> <li>• Disagree slightly</li> <li>• Disagree somewhat</li> <li>• Disagree completely</li> <li>• Don't know</li> </ul> <p>Drive when unsure if they are over the legal alcohol limit</p> <p>Drive at 90mph on the motorway when there is no traffic</p> <p>Use a mobile phone to text whilst driving</p> <p>Drive after taking Class A drugs</p>	<p><b>DA</b>NGEROUS BEHAVIOURS QUESTION</p> <p>All Respondents</p>



	<p>Driving at 40mph in a 30mph speed limit area</p> <p>Drive without insurance <del>or MOT</del></p> <p>Drive without a valid MOT certificate</p> <p>Carry on driving when too tired</p> <p>Parking on double yellow lines</p> <p>Drive too fast for conditions</p> <p>Use mobile phones while driving without a hands-free kit</p> <p>Use mobile phones while driving with a hands-free kit</p> <p>Don't use seatbelts while sitting in the front of the car</p> <p>Drive when over the legal alcohol limit</p> <p>Don't use seatbelts when sitting in the back of the car</p> <p>Drive after smoking Cannabis</p>	
9	<p>I am now going to read out some various types of behaviour and for each one. I would like you to tell me how acceptable or unacceptable you think it is for people to do these things, using the scores on the screen. A score of one means you think the behaviour is fairly acceptable and a score of five means you think it is extremely unacceptable, or you can use one of the numbers in between.</p> <ul style="list-style-type: none"> <li>• 01: FAIRLY ACCEPTABLE</li> <li>• 02</li> <li>• 03</li> <li>• 04</li> <li>• 05: EXTREMELY UNACCEPTABLE</li> <li>• (DK)</li> </ul> <p>Carry on driving when too tired</p> <p>Driving after drinking two pints</p> <p>Driving when unsure if they are over the legal alcohol limit</p> <p>Driving after taking Class A drugs</p> <p>Drive after smoking Cannabis</p> <p><del>Driving after taking drugs</del></p> <p>Driving at 40mph in a 30mph speed limit area</p> <p>Driving without motor insurance <del>or MOT</del></p> <p>Drive without a valid MOT certificate</p> <p>Dropping litter in the street</p> <p>Parking on double yellow lines</p> <p><del>Not buying a licence for your television</del></p> <p>Not wearing a seatbelt in the back of a car</p> <p>Not wearing a seatbelt in the front of a car</p> <p>Shoplifting</p> <p><del>Using a mobile phone whilst driving</del></p> <p>Using mobile phones while driving without a hands-free kit</p> <p>Using mobile phones while driving with a hands-free kit</p> <p>Using a mobile phone to text whilst driving</p>	<p>ACCEPTABILITY OF BEHAVIOURS QUESTION</p> <p>All respondents</p>
10	Which of these are the most effective when it comes to influencing how safely you drive? Please pick your top three.	All drivers (all who selected codes)

	<p>SHOW SCREEN - CODE TOP THREE IN ORDER</p> <ul style="list-style-type: none"> <li>• Newspaper articles about road safety/accidents</li> <li>• Signs/posters by the road about road safety issues</li> <li>• Driving instruction lessons</li> <li>• In-car safety systems e.g. seatbelt reminders, speed warnings</li> <li>• Speed cameras</li> <li>• Road safety advertising</li> <li>• Visible police presence</li> <li>• Speed humps</li> <li>• Threat of prosecution/penalties</li> <li>• Driving test</li> <li>• Family</li> <li>• Friends</li> <li>• Government</li> <li>• Don't know</li> <li>• None of the above</li> </ul>	1/2/3/4/5 at Q1)
11	<p>I am now going to read out some statements and I would like you to tell me to what extent you agree or disagree with each one. So, firstly...</p> <p>RANDOMISE</p> <ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Slightly agree</li> <li>• Neither</li> <li>• Slightly disagree</li> <li>• Strongly disagree</li> <li>• Don't know</li> </ul> <p>Roads are safer than they were five years ago</p> <p>There are now more police officers on the road than ever before</p> <p>There is too much advertising about road safety</p> <p>Road safety advertising has a strong impact on how people behave on the roads</p> <p>Traffic calming measures (e.g. speed bumps) make roads safer</p> <p>When I am driving in the country and there is a clear open road, I put my foot down</p> <p><del>You are more likely to die driving in a rural area than you are to die driving on a motorway or busy road</del></p> <p>I'm more likely to drive over the limit on rural roads because there are fewer vehicles and pedestrians around.</p> <p>I'm more likely to drive over the speed limit on rural roads because there is less of police presence</p> <p>I feel excluded on a night out when I am the designated driver</p> <p>When I am on a night out as a designated driver, venues encourage me to avoid alcoholic drinks</p> <p>I don't enjoy my night out as much when I am the designated driver</p>	All Respondents
12	<p><del>Thinking about your experiences as a passenger in a car or van, have you ever done any of the following? (MULTICODE)</del></p> <ul style="list-style-type: none"> <li><del>• Asked a driver to slow down</del></li> <li><del>• Not worn a seatbelt when travelling in the front seat</del></li> <li><del>• Not worn a seatbelt when travelling in the rear seat</del></li> </ul>	EXPERIENCE AS A PASSENGER QUESTION

	<ul style="list-style-type: none"> <li>• <del>Encouraged a driver to drive faster</del></li> <li>• <del>Felt unsafe because of the speed that the driver was driving at</del></li> <li>• <del>Refused to travel with a driver that you felt may be under the influence of drink</del></li> <li>• <del>Refused to travel with a driver that you felt may be under the influence of drugs</del></li> <li>• <del>Travelled with a driver who may have been under the influence of drink</del></li> <li>• <del>Travelled with a driver who may have been under the influence of drugs</del></li> <li>• <del>Been involved in an accident when travelling as a passenger</del></li> <li>• <del>Felt unsafe because a driver was using a mobile phone</del></li> <li>• <del>Felt unsafe because a driver was tired</del></li> <li>• <del>Don't Know</del></li> <li>• <del>Refused</del></li> <li>• <del>None of these</del></li> </ul>	All Respondents
13	<p>How long have you been driving? (SINGLE CODE)</p> <ul style="list-style-type: none"> <li>• Less than a year</li> <li>• Between 1 and 3 years</li> <li>• Between 3 and 6 years</li> <li>• Between 6 and 10 years</li> <li>• Between 10 and 20 years</li> <li>• More than 20 years</li> <li>• Don't know</li> </ul>	All drivers (all who selected codes 1/2/3/4/5 at Q1)
14	<p><del>When driving, what precautions do you take to avoid accidents with motorcyclists and cyclists on the road? (MULTICODE)</del></p> <p><del>SHOW SCREEN. RANDOMISE</del></p> <ul style="list-style-type: none"> <li>• <del>Checking mirrors regularly</del></li> <li>• <del>Watching for cyclists/ motorcyclists when turning</del></li> <li>• <del>Looking out for cyclists/ motorcyclists when coming out of a side road</del></li> <li>• <del>Leaving enough space between your car and cyclists/ motorcyclists</del></li> <li>• <del>Turning headlights down for oncoming cyclists/ motorcyclists</del></li> <li>• <del>Looking out for cyclists/ motorcyclists when opening car doors</del></li> <li>• <del>Expecting sudden movements in bad weather/ bad road surfaces</del></li> <li>• <del>Paying extra attention in bad weather/ bad road surfaces</del></li> <li>• <del>Other (specify)</del></li> <li>• <del>Don't know</del></li> </ul>	<p>All Drivers (all who selected codes 1/2/3/4 at Q1)</p> <p>Filter changed – Motorcyclists will no longer be asked this question, just those who drive a car/van/lorry</p>
	<p><b>SELF-COMPLETION EXERCISE:</b></p> <p>TYPE IN THE NUMBER NEXT TO YOUR ANSWER AND PRESS THE SPACE BAR. A CIRCLE SHOULD APPEAR IN THE BOX NEXT TO YOUR ANSWER.</p> <p>IF YOU DONT KNOW TYPE 'DK' .</p> <p>IF YOU DON'T WANT TO ANSWER THE QUESTION TYPE 'REF'</p> <p>PRESS THE F2 KEY TO MOVE ONTO THE NEXT QUESTION.</p>	Base: All Drivers (all who selected codes 1/2/3/4/5 at Q1) aged 18 years and above (self completion)
15	<p>How frequently, if at all, do you do each of the following?</p> <ul style="list-style-type: none"> <li>• 1 or more times a week</li> </ul>	PERSONAL BEHAVIOURS

	<ul style="list-style-type: none"> <li>• Once a fortnight</li> <li>• Once a month</li> <li>• Once every 2-3 months</li> <li>• Less often</li> <li>• Never</li> <li>• Don't Know</li> <li>• Refused</li> </ul> <p>This question is repeated for the following loop values:</p> <p>Drive when you are unsure if you are over the legal alcohol limit</p> <p>Drive at 90mph on the motorway when there is no traffic</p> <p>Use a mobile phone to text whilst driving</p> <p>Drive after taking Class A drugs</p> <p>Drive at 40mph in a 30mph speed limit area</p> <p>Drive without insurance</p> <p>Drive without a valid MOT certificate</p> <p>Carry on driving when too tired</p> <p>Park on double yellow lines</p> <p>Drive too fast for the conditions</p> <p>Use mobile phones while driving WITHOUT hands-free kit</p> <p>Use mobile phones while driving WITH hands-free kit</p> <p>Don't use seatbelts while sitting in the front of the car</p> <p>Drive when over the legal alcohol limit</p> <p>Don't use seatbelts when sitting in the back of the car</p> <p>Drive after smoking cannabis</p>	<p><b>QUESTION</b></p> <p>All Drivers (all who selected codes 1/2/3/4/5 at Q1) aged 18 years and above (self completion)</p>
16	<p>Thinking about people you know who drive, how many of them do you think...?</p> <ul style="list-style-type: none"> <li>• Most people I know do this</li> <li>• Some people I know do this</li> <li>• A few people I know do this</li> <li>• No one I know does this</li> <li>• Don't know</li> </ul> <p>Drive when unsure if they are over the legal alcohol limit</p> <p>Drive at 90mph on the motorway when there is no traffic</p> <p>Use a mobile phone to text whilst driving</p> <p>Drive after taking Class A drugs</p> <p>Drive at 40mph in a 30mph speed limit area</p> <p>Drive without insurance</p> <p>Drive without a valid MOT certificate</p> <p>Carry on driving when too tired</p> <p>Park on double yellow lines</p> <p>Drive too fast for the conditions</p> <p>Use mobile phones while driving without a hands-free kit</p> <p>Use mobile phones while driving with a hands-free kit</p> <p>Don't use seatbelts while sitting in the front of the car</p> <p>Drive when over the legal alcohol limit</p>	<p><b>'PEOPLE YOU KNOW' BEHAVIOUR QUESTION</b></p> <p>All Drivers (all who selected codes 1/2/3/4/5 at Q1) aged 18 years and above (self completion)</p>

	Don't use seatbelts when sitting in the back of the car Drive after smoking cannabis	
17a	<p>Which of these have you ever had? (MULTICODE)</p> <p>Please choose all that apply and scroll up and down the page to see the full list of answer options</p> <ul style="list-style-type: none"> <li>• Driving ban</li> <li>• Point on your licence</li> <li>• Fine for speeding</li> <li>• Fine for using a mobile phone while driving</li> <li>• Fine for not wearing a seatbelt</li> <li>• Fine for no MOT/insurance</li> <li>• A conviction for any type of driving offence</li> <li>• A breath test for alcohol (i.e. ever been breathalysed)</li> <li>• None of these</li> <li>• Don't know</li> <li>• Refused</li> </ul>	<p>All Drivers (all who selected codes 1/2/3/4/5 at Q1) aged 18 years and above (self completion)</p> <p>The word 'not' has been removed from statement 'Fine for not using a mobile phone while driving'</p> <p>Word 'other' removed to match 2008 scripted survey</p>
17b	<p>And which have you had in the last 3 years? (MULTICODE)</p> <ul style="list-style-type: none"> <li>• Driving ban</li> <li>• Point on your licence</li> <li>• Fine for speeding</li> <li>• Fine for using a mobile phone while driving</li> <li>• Fine for not using a seatbelt</li> <li>• Fine for no MOT/insurance</li> <li>• A conviction for any type of driving offence</li> <li>• A breath test for alcohol (i.e. ever been breathalysed)</li> <li>• None of these</li> <li>• Don't know</li> <li>• Refused</li> </ul>	<p>All Drivers (all who selected codes 1/2/3/4/5 at Q1) aged 18 years and above (self completion)</p> <p>The word 'not' has been removed from statement 'Fine for not using a mobile phone while driving'</p> <p>Word 'other' removed to match 2008 scripted survey</p>
18	<p>For each of the following statements please indicate which level of danger you personally think is associated with each ...</p> <p>DO NOT ROTATE, KEEP IN CURRENT ORDER.</p> <ul style="list-style-type: none"> <li>• <del>Very dangerous</del></li> <li>• <del>Fairly dangerous</del></li> <li>• <del>Not very dangerous</del></li> <li>• <del>Not at all dangerous</del></li> <li>• <del>Don't Know</del></li> </ul>	<p>All Drivers (all who selected codes 1/2/3/4/5 at Q1)</p>

	<del>Driving 10mph over the speed limit in bad weather conditions</del> <del>Driving 10mph over the speed limit when the road is clear</del> <del>Driving 5mph over the speed limit in bad weather conditions</del> <del>Driving 5mph over the speed limit when the road is clear</del> <del>Exceeding the national speed limit (60mph) on rural roads</del> <del>Exceeding the national speed limit (70mph) on motorways</del>	
	<b>SELF COMPLETION SECTION ENDS HERE</b>	
19	Can I just check, have you seen or heard any advertising about road safety recently? (SINGLE CODE) SHOW SCREEN <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> <li>• Don't know</li> </ul>	All Respondents
20	Who produced this advertising? (MULTICODE) PROBE: Do you remember any logos or brands? DO NOT READ OUT. CODE ALL THAT APPLY. DO NOT SHOW SCREEN. <ul style="list-style-type: none"> <li>• THINK!</li> <li>• Department for Transport/ DfT</li> <li>• Government – general</li> <li>• Police</li> <li>• Local Authority/ Local Council</li> <li>• AA/ RAC</li> <li>• Transport for London/ London Transport</li> <li>• GLA/ Mayor of London</li> <li>• Other (specify)</li> <li>• Don't know</li> </ul>	All who have seen/ heard road safety advertising (Code 1 at Q19)
21	Have you seen this logo before? (SINGLE CODE) SHOW THINK! LOGO <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> <li>• Don't know</li> </ul>	All Respondents
22	To what extent do you agree or disagree with the following statements about the THINK! campaign... RANDOMISE <ul style="list-style-type: none"> <li>• Strongly agree</li> <li>• Slightly agree</li> <li>• Neither agree nor disagree</li> <li>• Slightly disagree</li> <li>• Strongly disagree</li> <li>• Don't know</li> </ul> When I see something with the THINK! logo on, I trust it When I see something with the THINK! logo on, I take notice The THINK! campaign is really making a difference to the safety of our roads	All who recognise Think! logo (Code 1 at Q21)
23	Here is a list of words, both favourable and unfavourable which could be used to describe the THINK! campaign. Please could you pick out the words that you feel best describe the THINK! campaign from your point of view. (MULTICODE)	All who recognise THINK! logo (Code 1 at Q21)

	<p>SHOW SCREEN. CODE ALL THAT APPLY. RANDOMISE LIST.</p> <ul style="list-style-type: none"> <li>• Caring</li> <li>• Expert</li> <li>• Helpful</li> <li>• Boring</li> <li>• Intrusive</li> <li>• Old fashioned</li> <li>• Irrelevant</li> <li>• Independent</li> <li>• Innovative</li> <li>• Bossy</li> <li>• Thought provoking</li> <li>• Influential</li> <li>• None of these</li> <li>• Don't know</li> </ul>	
23b	<p>If THINK! was a person, who do you think it would most be like from the list below...</p> <p>SHOW SCREEN, SINGLE CODE, RANDOMISE LIST</p> <ul style="list-style-type: none"> <li>• A policeman/policewoman</li> <li>• A nanny</li> <li>• A teacher</li> <li>• An expert</li> <li>• Your friend</li> <li>• Your conscience</li> <li>• A politician</li> <li>• Your guardian angel</li> <li>• Your mother or father</li> <li>• None of these</li> <li>• Don't know</li> </ul>	<p>NEW ADDITION TO GAUGE IMAGE PERCEPTION OF THINK!</p> <p>All who recognise THINK! logo (Code 1 at Q21)</p>
24	<p>Approximately how often do you drink alcohol?</p> <ul style="list-style-type: none"> <li>• Every day/most days</li> <li>• 4-5 days a week</li> <li>• 2-3 days a week</li> <li>• Once a week</li> <li>• Once or twice a month</li> <li>• Once every couple of months</li> <li>• Less than this or never</li> <li>• Refused</li> <li>• Don't know</li> </ul>	<p>All respondents aged 18 years +</p>
25	<p><del>How often do you drink alcohol away from home, that is at a friend's house, in a pub, club or restaurant? (SINGLE CODE)</del></p> <ul style="list-style-type: none"> <li><del>• More than once a week</del></li> <li><del>• About once a week</del></li> <li><del>• Two or three times a month</del></li> <li><del>• About once a month</del></li> <li><del>• Less than once a month</del></li> <li><del>• Never away from home</del></li> <li><del>• Never drink alcohol</del></li> <li><del>• Don't know</del></li> </ul>	<p>All respondents aged 18 years +</p> <p>NB. To look at 'Driver Friendly' question against those who drink alcohol.</p>