



THINK! Annual Survey TNS-BMRB Report

JN: 229150

Date: February 2012

Content

1.	Introduction	1
1.1	Background.....	1
1.2	Research objectives and method	2
1.3	Arrangement of this report.....	2
2.	Management summary.....	4
2.1	Introduction and background	4
2.2	General attitudes towards road safety.....	4
2.3	Dangerous driving behaviours 2011	4
2.4	Dangerous driving behaviours: issue by issue	5
2.5	Awareness of, and attitudes towards, the THINK! brand	9
2.6	Young motorists.....	10
3.	General attitudes towards road safety	11
3.1	Road safety issues to address	11
3.2	Perception of road safety over time.....	15
3.3	Influences on safe driving	17
3.4	Perceived risk of accidents	18
4.	Dangerous driving behaviours 2011	20
4.1	Dangerous driving behaviours overall	20
5.	Dangerous driving behaviours: issue by issue	23
5.1	Drinking Driving	23
5.1.2	<i>Designated drivers</i>	27
5.2	Drug driving	29
5.3	Speeding.....	33
5.4	Seatbelts	37
5.5	Using a mobile phone while driving	41
5.6	Motorcycles and bicycles.....	45
5.7	Driver fatigue	48
6.	Awareness of, and attitudes towards, the THINK! brand	51
6.1	Spontaneous awareness of advertising about road safety.....	51
6.2	Prompted awareness of the THINK! logo	53
6.3	THINK! brand personality	54
6.4	Attitudes towards THINK! and road safety advertising	56
7.	Young motorists	62
7.1	Dangerous driving behaviours	62
7.2	Attitudes towards motorcyclists	66
7.3	Awareness of, and attitudes towards, the THINK! brand	67
	Appendix A: Road user profile	69
	A1 Types of road users	69
	A2 Types of journey made	71
	A3 Distance driven and length of time driving.....	74

Appendix B: Sampling method	76
Appendix C: Weighting procedures	77
Target Weights Applied	77
Appendix D: Questionnaire.....	79

1. Introduction

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*. A mix of engineering, enforcement and education measures were used, with THINK! Road Safety communications activity supporting the achievement of a 44% reduction in the number of people killed or seriously injured between 2000 and 2009 when compared to the 1994 – 1998 baseline¹.

The Government published a new strategy document, *Strategic Framework for Road Safety* in May 2011. This strategy aims to continue making progress in reducing road deaths and serious injuries through safer infrastructure, education drawing on behavioural science and tougher, targeted sanctions at both the national and local level, with a greater emphasis on more local, devolved decision making. THINK! continues to be part of this strategy.

The THINK! campaign aims to encourage all road users to recognise that it is 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 the 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.

The table below shows all campaign activity in 2011.

		Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	July 11	Aug 11	Sept 11	Oct 11	Nov 11
Motor cycles	Named Rider					X	X					
Drink Drive	Personal consequences	X										
Child	Tales of the Road									X	X	

,X' indicates month campaign activity ran

¹ DfT Strategic Framework for Road Safety (May 2011)

<http://assets.dft.gov.uk/publications/pgr-roadsafety-strategicframework-pdf/strategicframework.pdf>

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 November 2011. The Annual Survey differs to the normal waves of THINK! research in that a focus was placed on gaining annual measures of road safety attitudes and behaviour among the British population, rather than simply focusing in on campaign measurement and evaluation.

The November 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 2nd to 6th November 2011 among adults aged 16+ in Great Britain. Interviews were conducted using the TNS Omnibus survey. This is a survey that is run each week, with different clients placing questions onto a common questionnaire, and sharing the costs of fieldwork and analysis. All results are confidential to the individual client. Interviews were conducted in-home, using Computer Assisted Personal Interviewing (CAPI) by fully trained members of TNS's field force, working under supervision. The sample was drawn by means of Random Location sampling (see appendices for further details).

In total 2,007 interviews were conducted with those aged 16+ in Great Britain. Of these, 1,184 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 November 2011 Annual Survey wave of research for the THINK! road safety campaign compared with the results from the 2006, 2007, 2008, 2009 and January–February 2011 Annual Surveys.

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 99% confidence level) between January-February 2011 and November 2011 have been indicated on charts by „*“. Statistical significance is defined as a difference observed between two proportions that is unlikely to have arisen by chance. The figures in this report are significance tested at the 99% level, which means that there is only a 1 in 100 chance that the survey has resulted in a difference by chance.

2. Management summary

2.1 Introduction and background

This report focuses on the THINK! Annual Survey, carried out in November 2011. A total of 2,007 interviews were conducted in Great Britain, with those aged 16+. Among these, 1,184 interviews were conducted with motorists.

2.2 General attitudes towards road safety

The perceived most important issues for the Government to address to improve road safety are the same as those mentioned in February 2011: drink driving, use of mobile phones without a hands-free kit, speeding, drug driving and careless driving. The perceived least important issue for the Government to address is road rage.

Three fifths (61%) at the latest wave agreed that traffic calming measures make roads safer, 29% agreed that roads are safer than they were 5 years ago and 28% agreed that there are now more police officers on the road than before.

The top four effective influences on an individual driving safely remained the same as February 2011, namely: visible police presence, speed cameras, threat of prosecution and family. However, there was a decrease recorded in November 2011 in terms of the impact of the threat of prosecution, as well as family, which both reached their lowest levels since tracking began. Friends, newspaper articles and government continue to be regarded as the least effective at influencing individuals.

In terms of which transport is considered safest, walking and trains came out top, with bicycles and motorcycles considered the least safe of all modes of transport.

2.3 Dangerous driving behaviours 2011

In November 2011, driving after taking Class A drugs was regarded as the most dangerous behaviour (88% agreeing), followed by driving when over the alcohol limit (87%). Five other behaviours received agreement by over four fifths of respondents: using a mobile phone to text whilst driving (86%), using mobile phone *without* hands free kit (83%) driving after smoking cannabis (83%), when unsure if over the alcohol limit (82%) and driving too fast for the conditions (81%).

There was relatively low agreement that speeding is dangerous: only half (52%) agreed that driving at 40 mph in a 30 mph area is dangerous whilst only 42% agreed that driving at 90 mph on a motorway when there is no traffic is dangerous.

Speeding is the behaviour most frequently conducted by motorists, with half claiming to do so at all. Just under a third (31%) claimed to drive at 90mph on a motorway when there is no traffic whilst 26% claimed to drive too fast for the conditions. Around a third (37%) also claimed to carry on driving when too tired and to park on double yellow lines (33%).

There is almost universal unacceptability of a number of behaviours. The behaviours which are regarded as dangerous are also seen to be unacceptable, which is to be expected. Driving after taking Class A drugs and driving when over the legal alcohol limit are both deemed as unacceptable by 98% whilst the two mobile phone related behaviours of texting whilst driving and using a mobile phone *without* a hands free kit whilst driving are seen as unacceptable by 97% and 96% respectively.

Although there is almost universal unacceptance of driving when over the legal alcohol limit, unacceptance of driving when unsure if over the legal alcohol limit is lower, at 90% and not drinking after two pints was deemed to be unacceptable by 73%.

2.4 Dangerous driving behaviours: issue by issue

Drink driving

Although agreement has remained high that driving when over the alcohol limit is dangerous, it has in fact decreased significantly since February 2011, from 92% to 87%. This is now the lowest level since October 2008. Slightly fewer agree that it is dangerous to drive when unsure if over the limit and this again is at a lower level than February 2011, albeit not significantly lower.

Around a quarter (24%) at the latest wave thought that they knew someone who drove when over the legal alcohol limit. However, the number rises considerably in terms of those who know someone who drives when they are unsure if they are over the legal alcohol limit, with two fifths (41%) in total claiming they know someone who does this.

The prevalence of those claiming to drive when unsure if they are over the legal alcohol limit decreased significantly at the latest wave, from 12% to 8%. This is the lowest level recorded on this measure since tracking began. There also continues to be a very low number claiming to drive when over the legal alcohol limit, at 3% at the latest wave, also the lowest point since tracking began.

Designated driver

A fifth (20%) of motorists agreed that they feel excluded on a night out when they are the designated driver and almost three in ten (28%) claimed that they don't enjoy

their night out as much when they are the designated driver. There has been no real change in this measure since February 2011.

There seems to be mixed awareness of venues encouraging designated drivers to avoid alcoholic drinks. Although 24% agreed with this statement, 37% disagreed with it and a further 35% were unsure. There is clearly therefore at least a perception amongst a significant minority that venues do not encourage the avoidance of alcoholic drinks.

Drug driving

Despite the very high level of agreement, there was a significant decrease in the number of respondents overall and motorists specifically who completely agreed that driving after taking Class A drugs was dangerous at this latest wave. These decreases have however brought the levels of agreement down to a level on a par with those recorded before the last burst of the drug driving campaign prior to 2009, suggesting any impact of the campaign has now dissipated.

Driving after smoking cannabis is, as would be expected, regarded as less dangerous than driving after taking Class A drugs, amongst all groups. There has been no real change in this level of agreement since the last wave.

As with previous waves, there are very few respondents who think that people they know take drugs and drive. Only 7% claim that someone they know drives after taking Class A drugs and one in ten claims to know someone who drives after taking cannabis. Given the nature of these behaviours, these levels are unsurprising and demonstrate that they are a minority behaviour.

The frequency of individuals themselves taking drugs and driving is very low, at 2% for driving after smoking cannabis and 1% after taking Class A drugs. There has been very little movement in this measure over time, trending at 2% and 1% respectively.

Speeding

Those agreeing completely that driving too fast for the conditions is dangerous decreased at the latest wave (from 85% to 81%). However, this is still a higher level than that recorded prior to the „Live with it” campaign.

The perceived danger of driving at 40mph in a 30mph area has remained on a par across the most recent waves, recording 52% at the latest wave. The one speeding behaviour for which the perceived danger has increased significantly over time, and indeed, reaching the highest level of agreement since tracking began, was driving at

90mph on the motorway when there is no traffic. This reached a level of 42% at the latest wave, up from 35% in February 2011.

The behaviour for which most claim to know people who do it is driving 40mph in a 30mph speed limit area (63%). This is followed by driving at 90mph on a motorway when there is no traffic (58%) and driving too fast for the conditions which 49% claimed they knew someone who did it.

Despite fewer people regarding the behaviours as dangerous at this wave, there has in fact been a significant decrease in those claiming to do each of them themselves. Driving at 40mph in a 30mph zone is still the most frequent claimed behaviour though has dropped from 60% in February 2011 to 50% at the latest wave. Driving at 90mph on the motorway when there is no traffic recorded the largest drop, from 45% to 31% whilst driving too fast for the conditions dropped from 34% to 26%. Claimed prevalence on each of these three measures is now at its lowest point since tracking began.

Seatbelts

In February 2011 there was an increase in those completely agreeing that not using a seatbelt in the front of the car is dangerous (to 83%) but this has now returned back to previous levels of 78%, seen in 2006 to 2009. Overall, fewer believe that not using a seatbelt in the back of a car is dangerous compared to not using a seatbelt in the front of the car. This level was 68% in November 2011 and has trended around this level since 2006.

Three in ten motorists (30%) claim to know someone who doesn't use a seatbelt in the back of the car. The level of not using a seatbelt when in the front of the car is however lower at one in five (19%) indicating that this behaviour is not as widespread, although the prevalence of backseat passengers will also be lower.

Again, despite a decrease in those agreeing that it is dangerous – the number who say that they don't wear a seatbelt in the front of the car has fallen significantly to 6% at the latest wave. This is the lowest point since tracking began. The number not using a seatbelt in the back has also fallen to 15%, the lowest level we have seen.

Using a mobile phone while driving

In November 2011 significantly more people, 30% overall, thought that it is dangerous to use a mobile with handsfree kit, reaching the highest level recorded on this behaviour and showing a general upwards trend from 2006. However, amongst motorists, there has been a drop in the number who completely agree that it is dangerous to text and a decrease in agreement that it is dangerous to use a mobile phone without a hands free kit. This is possibly as a result of lack of campaign

activity, with the last national campaign having been in May 2009 or it may be the increased use of mobile phones generally as an essential part of daily life.

Over half of respondents (56%) claim to know someone who uses a mobile phone whilst driving, with a hands-free kit. This is the highest level for any of the mobile phone behaviours. Around two fifths (39%) know someone who uses a mobile phone whilst driving without the use of a hands free kit and perhaps more worryingly, a similar proportion (35%) know someone who uses a mobile phone to text whilst driving.

There has been a trend since 2006 in terms of fewer people admitting to using a mobile phone without a handsfree kit (11% at the latest wave) and texting whilst driving (10%). Indeed, these are both significantly lower than in February 2011 and are now at their lowest levels since tracking began. However the proportion who say that they use a mobile phone with a handsfree kit while driving has remained fairly stable since 2006 at 24%, despite a peak of 28% in February 2011.

Motorcycles and bicycles

There are very high levels of agreement with the statement *motorcyclists are more vulnerable in everyday driving situations than other drivers on the road*, with 92% agreeing.

In terms of the precautions drivers take to avoid accidents with motorcyclists and cyclists, broadly, between half and three quarters of drivers take each of these precautions, something which has remained fairly stable over time. The top five actions motorists take have remained stable over time: check mirrors regularly, leave space between car and cyclists/bikers, watch for cyclists/bikers when turning, look out for cyclists/bikers when coming out of side road and looking out for cyclists/bikers when opening car doors.

There have however been a few significant changes within the precautions taken - drivers now claim to be more likely to pay extra attention and to expect sudden movements in bad conditions. However, after a peak in November 2009, agreement that they leave space between the car and bikers has returned to previous levels.

Driver fatigue

Two thirds of respondents agree completely that it is dangerous to carry on driving when too tired, a level which has not varied greatly since tracking began. However there is still room for improvement and a third are not in complete agreement that driving when too tired is dangerous, perhaps being seen as a necessary evil which cannot be avoided.

Just over two fifths (43%) claim to know someone who carries on driving when too tired and following the increase between November 2009 and February 2011 (40% and 45% respectively), the level of those claiming to carry on driving when too tired fell back to 2008 levels at this latest wave, to 37%.

2.5 Awareness of, and attitudes towards, the THINK! brand

Recall of road safety advertising has continued to fall and stands at 35% in November 2011, a decrease from 41% in February 2011. The continued drop in recall, despite an increase in activity since 2010 may be an indication that the memory of some of the bigger campaigns has been slow to disappear, but that this memory is now beginning to fade as time passes from the period of heavy THINK! activity up until 2009.

The proportion attributing road safety advertising to the Government fell to 19% in November 2011, with only slightly fewer citing DfT and THINK! as being responsible. However, November 2011 was the first time that DfT (16%) was more likely to be named as the source than THINK! (14%).

When prompted, nine in ten said they had previously seen the THINK! logo (89%), consistent with recent waves.

The THINK! brand personality is still overwhelmingly viewed as positive, with "helpful" and "thought provoking" being the descriptions most commonly associated with the brand. However, levels for all positive and negative words fell in November 2011, suggesting that there has been a general decrease in association with the brand personality, with people less likely to be able to associate THINK! with anything. No negative terms were chosen by more than 7%.

Three quarters of respondents said that they take notice when they see the THINK! logo (77%), and that they trusted it (72%) and six in ten believed that the campaign was making roads safer. The proportion who said that the campaign really makes a difference significantly increased in November 2011 from 52% to 60%, while the figures for the other attitudinal statements remained consistent with 2009 levels.

Over half of respondents (56%) agreed that road safety advertising has a strong impact on how people behave on the roads. Only twelve per cent believed that there was too much road safety advertising, although this had increased from 8% in February 2011.

2.6 Young motorists

Young motorists are not dramatically different from motorists as a whole, but they are less likely to classify behaviours as dangerous or extremely unacceptable, in particular using a mobile phone to text while driving, or with a hands free kit or parking on double yellow lines. They were more likely than the average motorist to cite not wearing a rear seatbelt as dangerous and as extremely unacceptable.

Young motorists were largely similar to motorists as a whole in terms of their own behaviour, but they were more likely to text while driving, drive too fast for the conditions and use a mobile phone with a hands free kit. They were also more likely to see these behaviours amongst their peer group, as they were to see a range of other dangerous driving behaviours, including not wearing a rear seatbelt.

This group were less aware of the needs and vulnerabilities of motorcyclists, perhaps reflecting their lack of experience as well as less cautious driving behaviour. Encouragingly, young motorists have a higher awareness of the THINK! logo and view the brand as more influential, trustworthy and making a difference to road safety, suggesting it is well placed for influencing this group in future.

3. General attitudes towards road safety

This chapter first of all looks specifically at which road safety issues were felt to be most important and what is the most effective influencer on safe driving over time. It then goes on to explore influences on safe driving and the perceived risk of accidents.

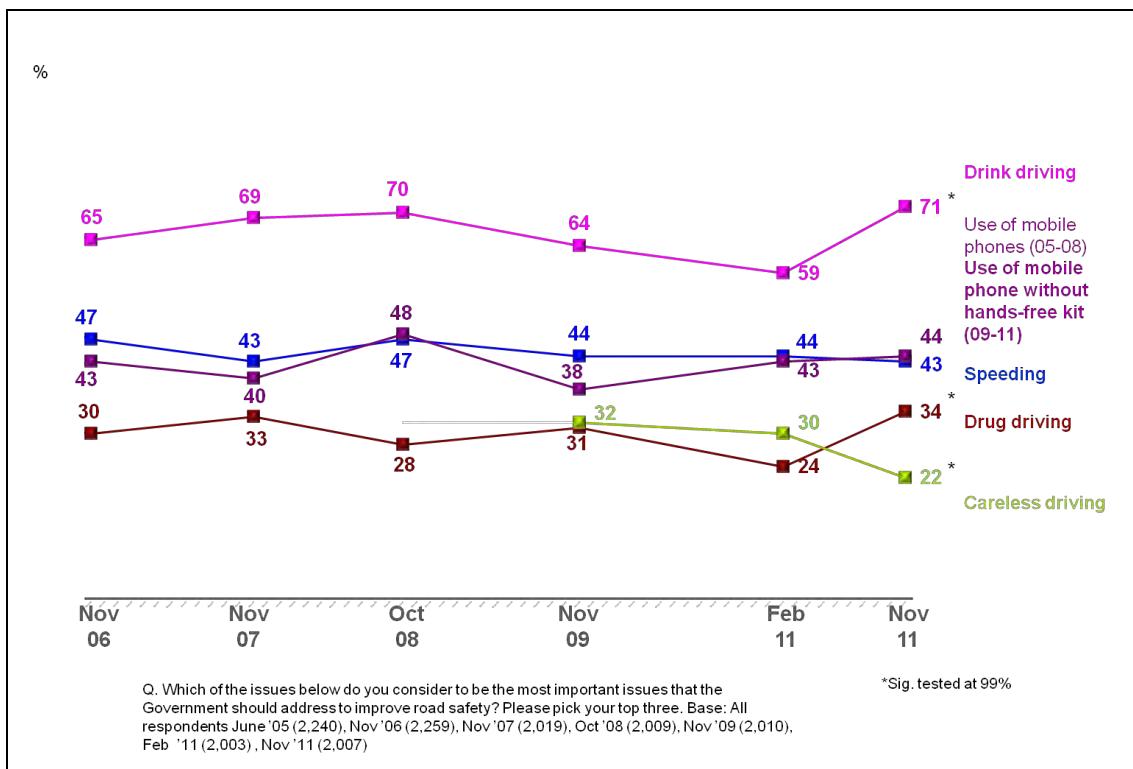
3.1 Road safety issues to address

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 the Government should address (Charts 3a and 3b). It is important to note some changes to this section of the questionnaire in 2009 and February 2011. Since the question asks people to specify their top three choices, the introduction of additional options on the 2009 and February 2011 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. Specific changes were:

- 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 these have 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. 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.
- In February 2011 „Cycling safety” was added to the list of issues.

Chart 3a shows the top five mentioned road safety issues which respondents believe are the most important to address.

Chart 3a – Top three road safety issues most important to address (1)

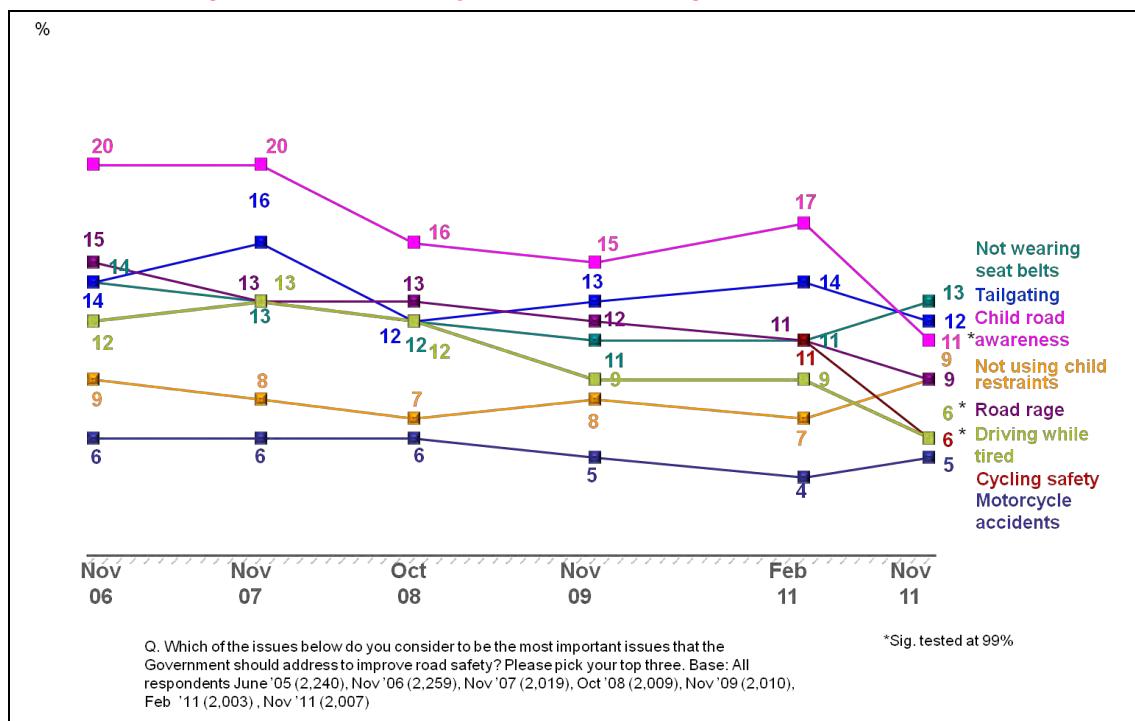


The top five mentioned issues are the same as those mentioned in February 2011. Indeed, as with previous waves, drink driving is regarded as being the most important issue to address in terms of road safety and, a significant increase has been recorded on this since February 2011 (from 59% to 71%). Use of mobile phones without a hands-free kit is regarded as the second most important issue and has remained unchanged since February 2011 (44%).

Whilst speeding is currently regarded as the third most important issue (43%), there has been a significant change around in the order of fourth and fifth place, with drug driving significantly increasing from 24% to 34% over the period. At the same time, careless driving has experienced a significant decrease since February 2011 from 30% to 22%.

Whilst Chart 3a showed the top five mentioned issues, Chart 3b shows the remaining issues.

Chart 3b – Top three road safety issues most important to address (2)



Motorcycle accidents remain the least important issue, a pattern which has been seen since tracking began. There have however been a number of movements for the other issues. The main changes since February 2011 were all decreases and were recorded for: child road awareness (from 17% to 11%), driving while tired (from 9% to 6%) and cycling safety (from 11% to 6%). Indeed, all three of these aspects have now reached their lowest levels since tracking began.

Table 3a – Top three road safety issues most important to address (motorists vs. non motorists)

	Oct 08		Nov 09		Jan/Feb 11		November 11	
	Motorist (1,227) %	Motorist (1,233) %	Motorist (1,233) %	Non Motorist (777) %	Motorist (1,371) %	Non Motorist (632) %	Motorist (1,184) %	Non Motorist (823) %
Drink driving	67	75	61	71	58	61	71	70
Use of mobile phones without hands free kit	n/a	n/a	41	31	46	35	48	38
Speeding	43	53	39	54	42	49	40	50
Careless driving	n/a	n/a	33	30	31	28	23	21
Drug driving	28	29	31	30	24	23	33	35
Tailgating	17	4	17	5	18	5	17	4
Child road awareness	14	21	13	19	17	19	9	15
Cycling safety	n/a	n/a	n/a	n/a	11	11	6	8
Road rage	13	12	13	11	10	13	9	9
Not wearing seat belts	11	15	10	14	10	15	12	15
Driving while tired	13	11	9	11	8	11	6	6
Not using child restraints	8	6	9	7	7	7	10	7
Use of mobile phones with a hands free kit	n/a	n/a	9	9	7	9	7	8
Motorcycle accidents	5	7	6	4	5	4	4	5

Amongst motorists, a similar hierarchy of the most important issues was recorded. Within the top five, the main differences can be seen in relation to using mobile phones without hands free kit which is seen as much more of an issue amongst motorists (48% compared with 38% non motorists) whilst speeding is seen as more of an issue amongst non motorists (50% compared with 40% motorists). This is perhaps due to the familiarity motorists have with the dangers of mobile phones whilst driving.

The only other real differences between the two groups were tailgating, where there has always been a large difference between motorists and non motorists (17% compared with 4% at the latest wave), again perhaps to do with more of a familiarity of the issue amongst motorists and, child road awareness which is higher amongst non motorists than motorists (15% compared with 9%) as a pedestrian issue.

3.2 Perception of road safety over time

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. The following charts show agreement with these statements among all respondents (Chart 3c), all motorists (Chart 3d) and all non motorists (Chart 3e).

Chart 3c – Agreement with statements about road safety – All respondents

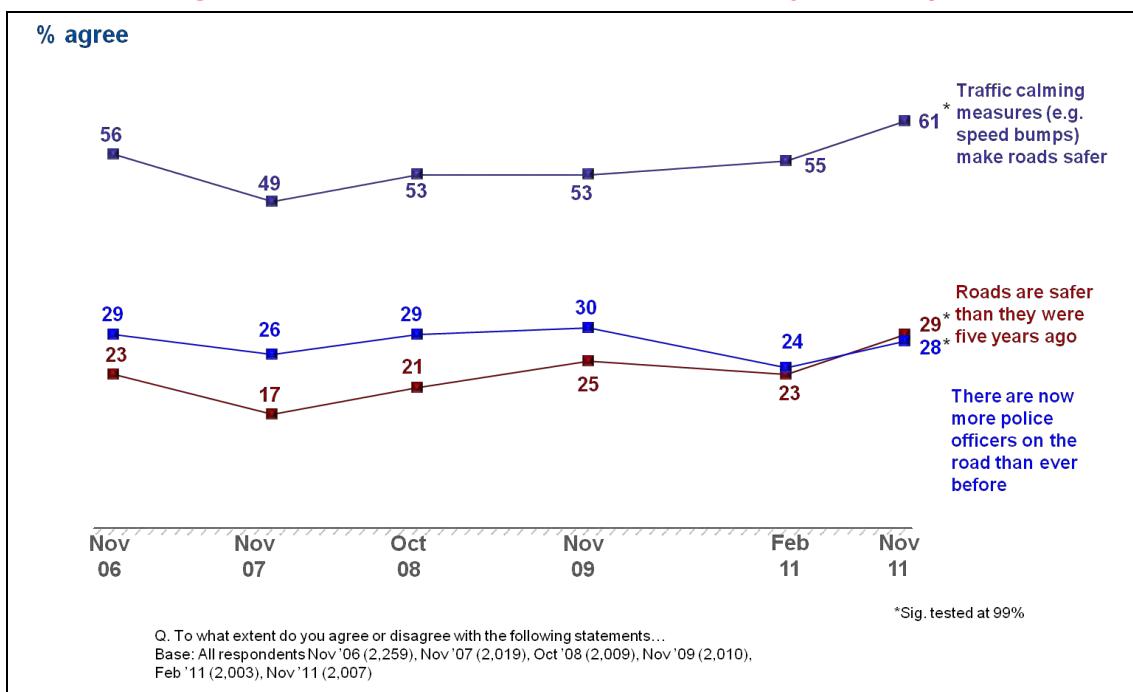
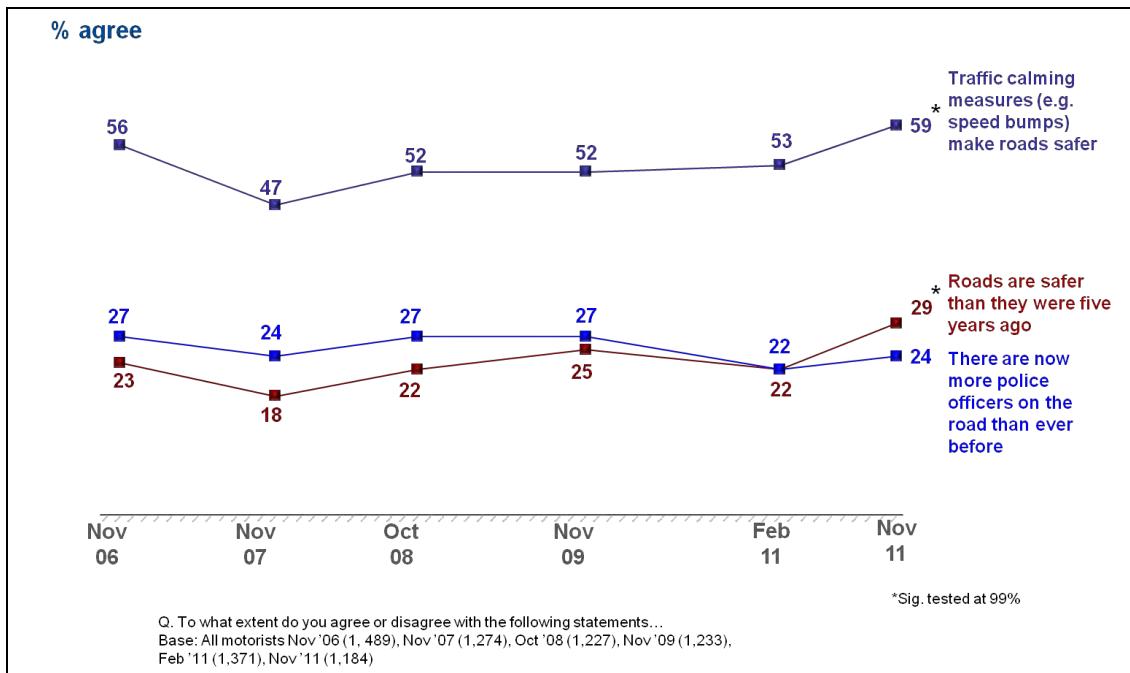
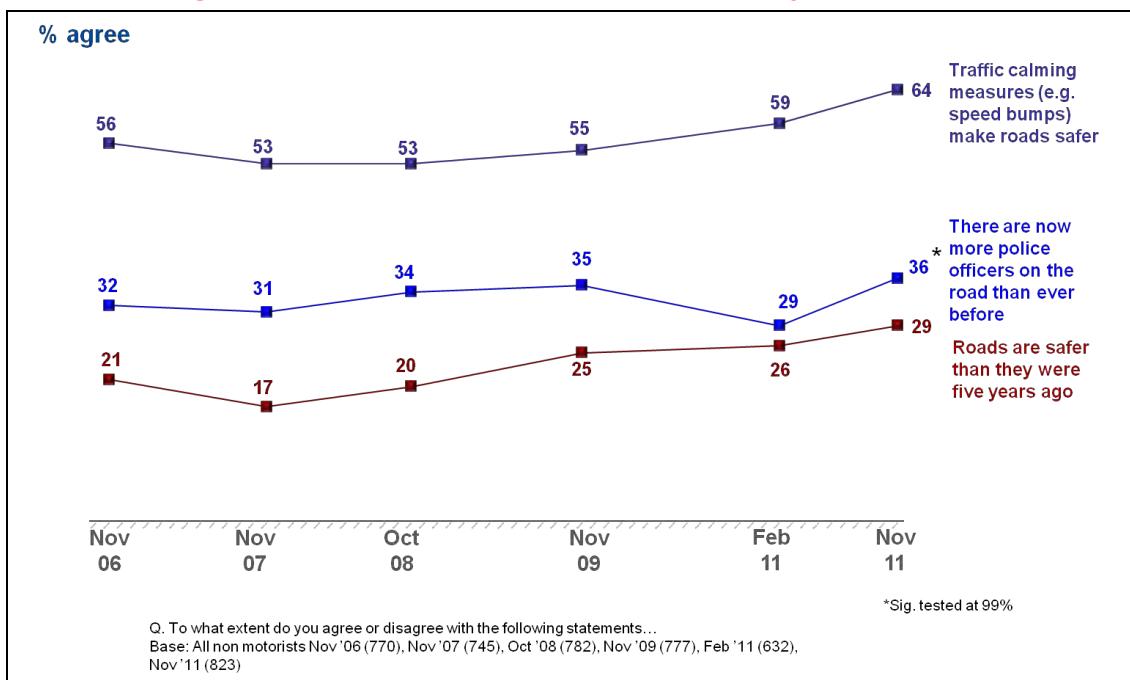


Chart 3d – Agreement with statements about road safety – All motorists**Chart 3e – Agreement with statements about road safety – All non motorists**

Amongst all respondents, there were significant increases recorded in the number agreeing that traffic calming measures make roads safer, reaching 61% at the latest wave and in turn, reaching the highest point since tracking began in 2006. Following the drop in February 2011, there was also a significant increase at this latest wave in the proportion agreeing roads are safer than they were 5 years ago (29% compared with 23% in February 2011). On the final statement, that there are now more police

officers on the road than before, there was also a significant increase since February 2011 in the number agreeing, from 24% to 28%.

A very similar picture was recorded amongst motorists to all respondents, the only exception being the increase in agreement that there are now more police officers on the road than ever before where there was not a significant increase. Amongst non motorists however the level of agreement was higher than for motorists on traffic calming measures making roads safer (64%) and there are now more police officers on the road than before (36%). The perception that roads are safer than they were five years ago was however the same level as for motorists.

3.3 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. Charts 3f and 3g show the results to this measure.

Chart 3f – Top three most effective influencers on own safe driving (1)

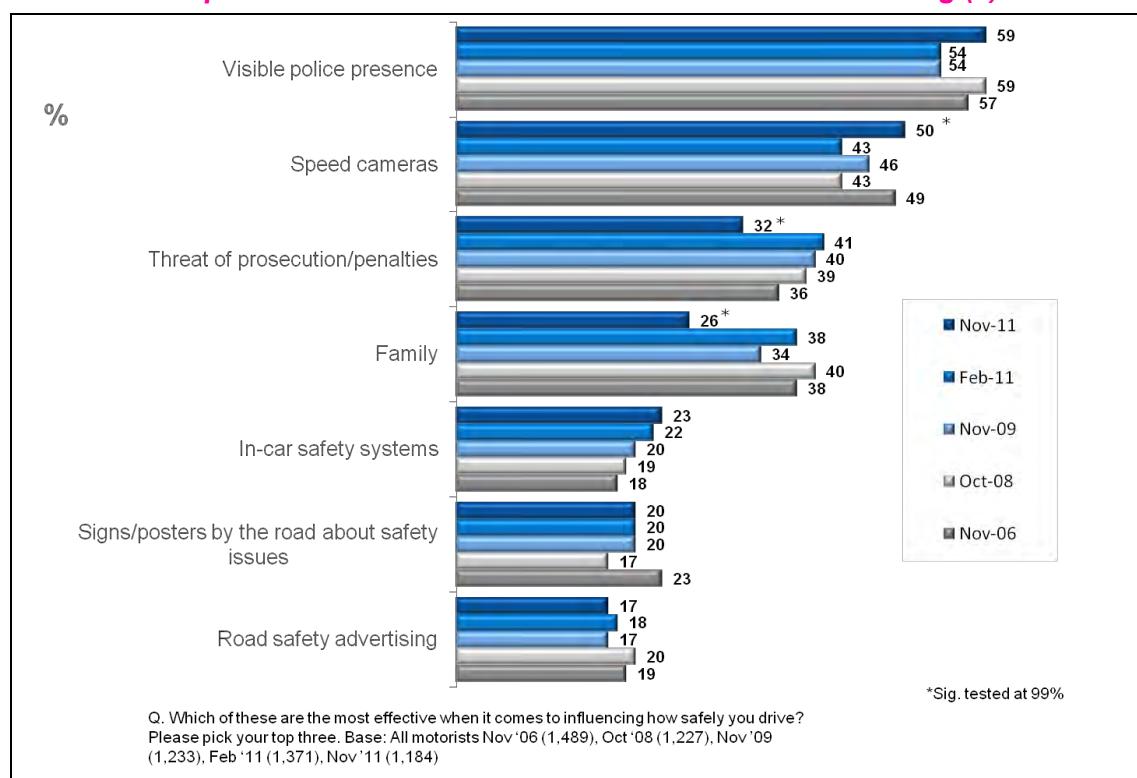
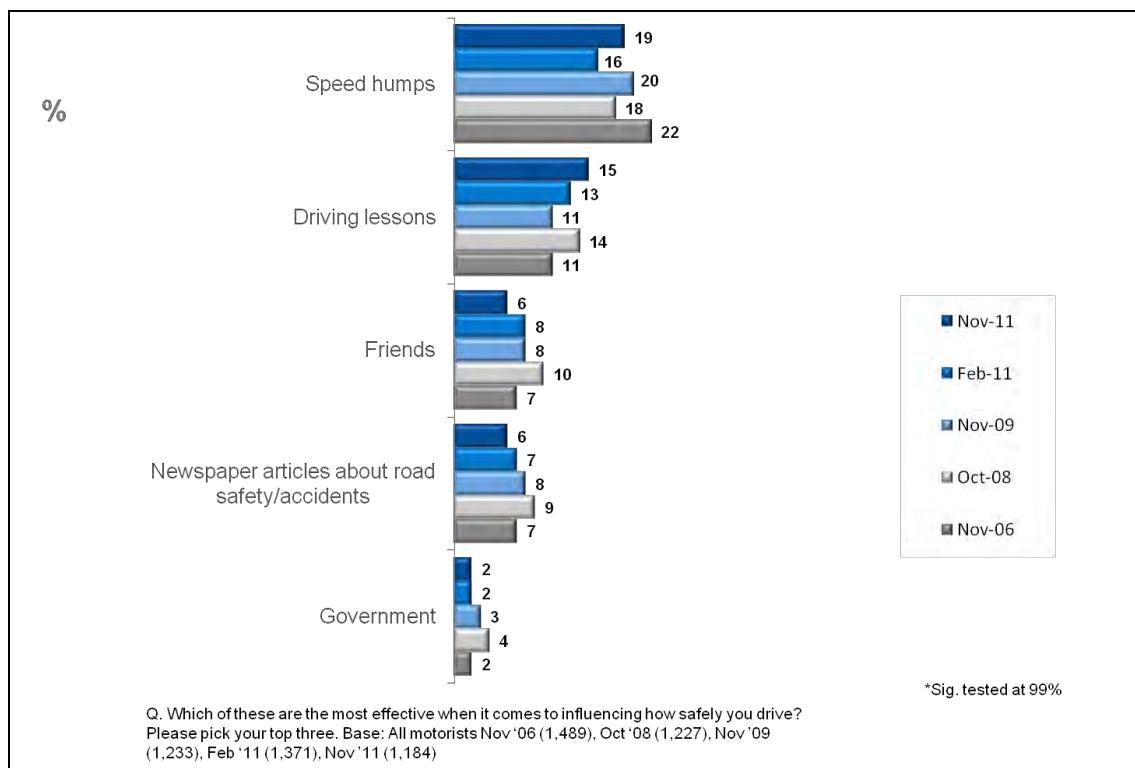


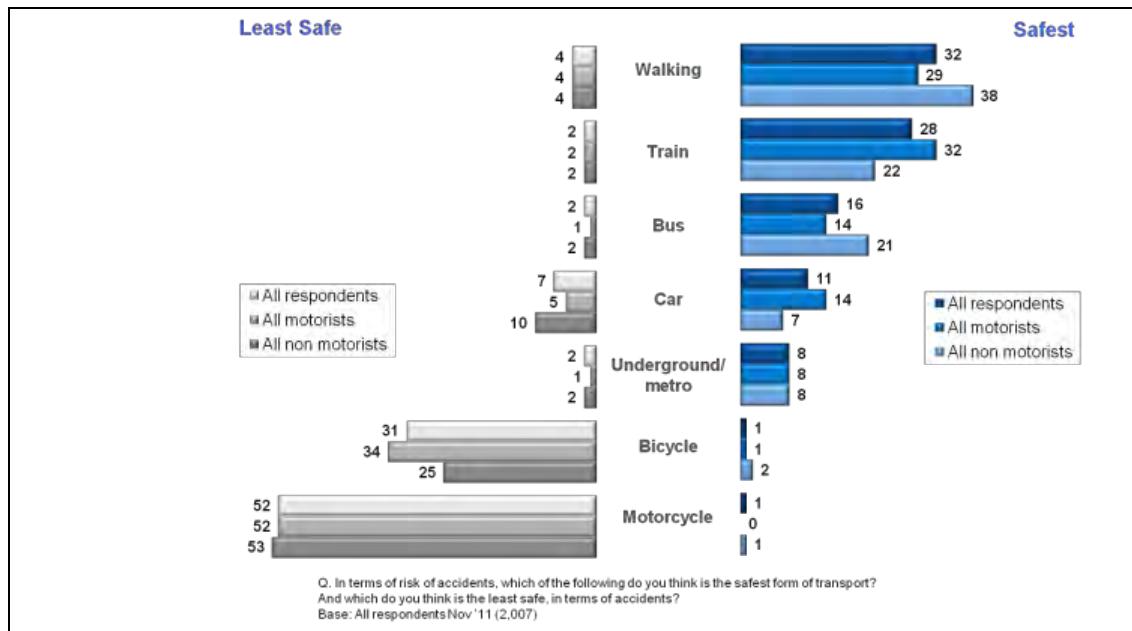
Chart 3g – Top three most effective influencers on own safe driving (2)

The four main influences remained the same as February 2011, namely: visible police presence, speed cameras, threat of prosecution and family. However, there was a decrease recorded in November 2011 in terms of the impact of the more serious measure of the threat of prosecution, as well as family, which both reached their lowest levels since tracking began, in favour of physical enforcement measures like speed cameras and to a lesser extent police presence.

Friends, newspaper articles and government continue to be regarded as the least effective influencers in influencing how safely motorists drive.

3.4 Perceived risk of accidents

In order to understand the perceived risk of accidents, respondents were shown a list and asked which mode of transport they thought was the safest and which mode was the least safe in terms of accidents. Chart 3h shows the results amongst all respondents, motorists and non motorists.

Chart 3h – Safest and least safe forms of transport in terms of accidents

In terms of which transport is considered safest, walking and trains came out top, with bicycles and motorcycles considered the least safe of all modes of transport. There were some minor differences between motorists and non motorists and no doubt as a result of reflecting their usual form of transport, motorists were more likely than non motorists to think the car is safe and conversely non motorists thought the bus was safer than motorists.

4. Dangerous driving behaviours 2011

4.1 Dangerous driving behaviours overall

This section summarises the overall hierarchy of agreement that behaviours are dangerous, frequency of doing them and acceptability relative to each other. Section 5 of the report will then go on to examine each of the behaviours in detail.

Chart 4a – Agreement that each behaviour is dangerous

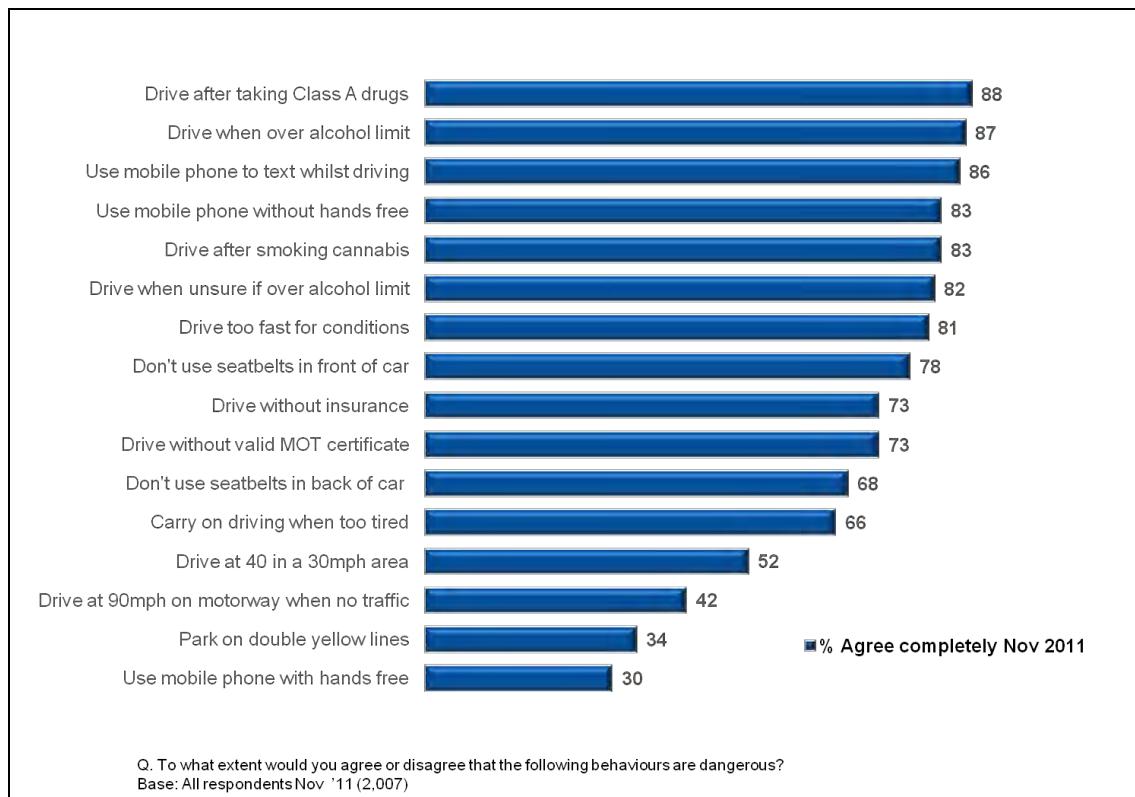
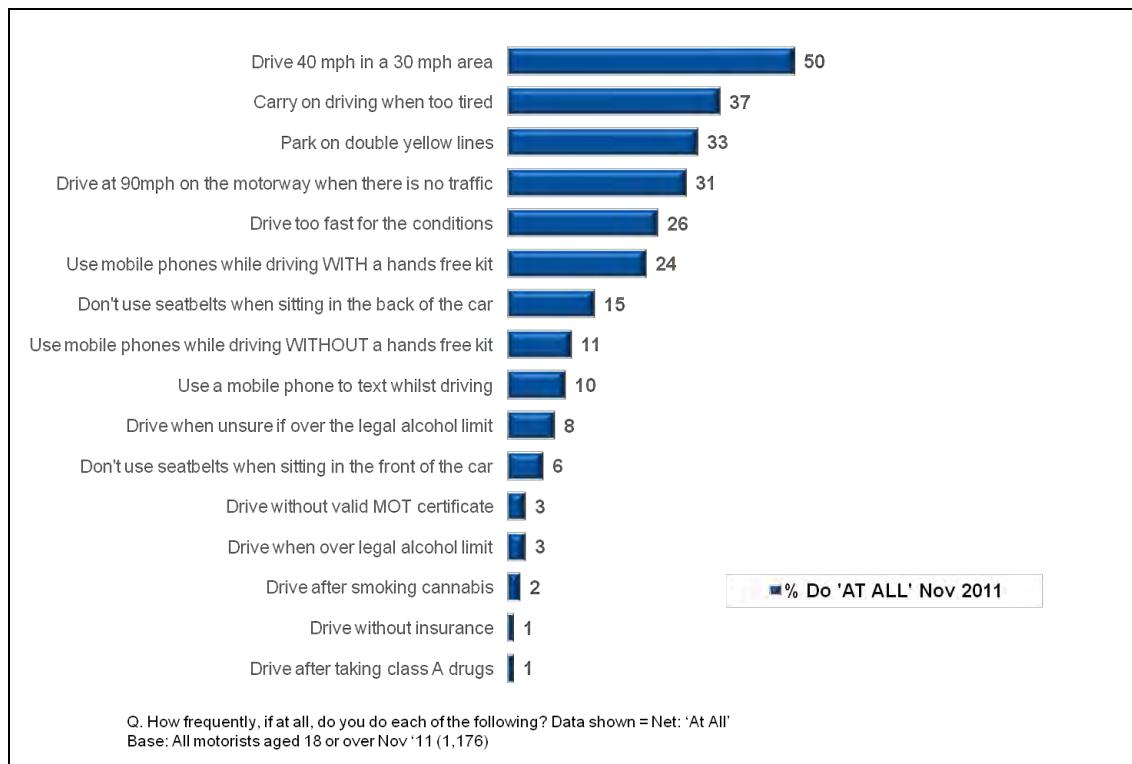


Chart 4a shows those agreeing *completely* as to whether each behaviour is dangerous. Perhaps unsurprisingly, it is driving after taking Class A drugs which is deemed as the most dangerous behaviour (88% completely agreeing), followed by driving when over the alcohol limit (87%). Five other behaviours receive agreement by over four fifths of respondents; using a mobile phone to text whilst driving (86%), using mobile phone without hands free kit (83%) driving after smoking cannabis (83%), when unsure if over the alcohol limit (82%) and driving too fast for the conditions (81%). The level of perception of danger for each of these actions is therefore very high.

Slightly disappointing may be the relatively low levels agreeing completely that speeding is dangerous. Specifically, only half (52%) completely agreed that driving at 40 mph in a 30 mph area is dangerous whilst only 42% agreed completely that driving at 90 mph on a motorway when no traffic is dangerous.

Chart 4b below shows the frequency with which motorists claim to perform each of the behaviours.

Chart 4b – Prevalence of dangerous driving behaviour

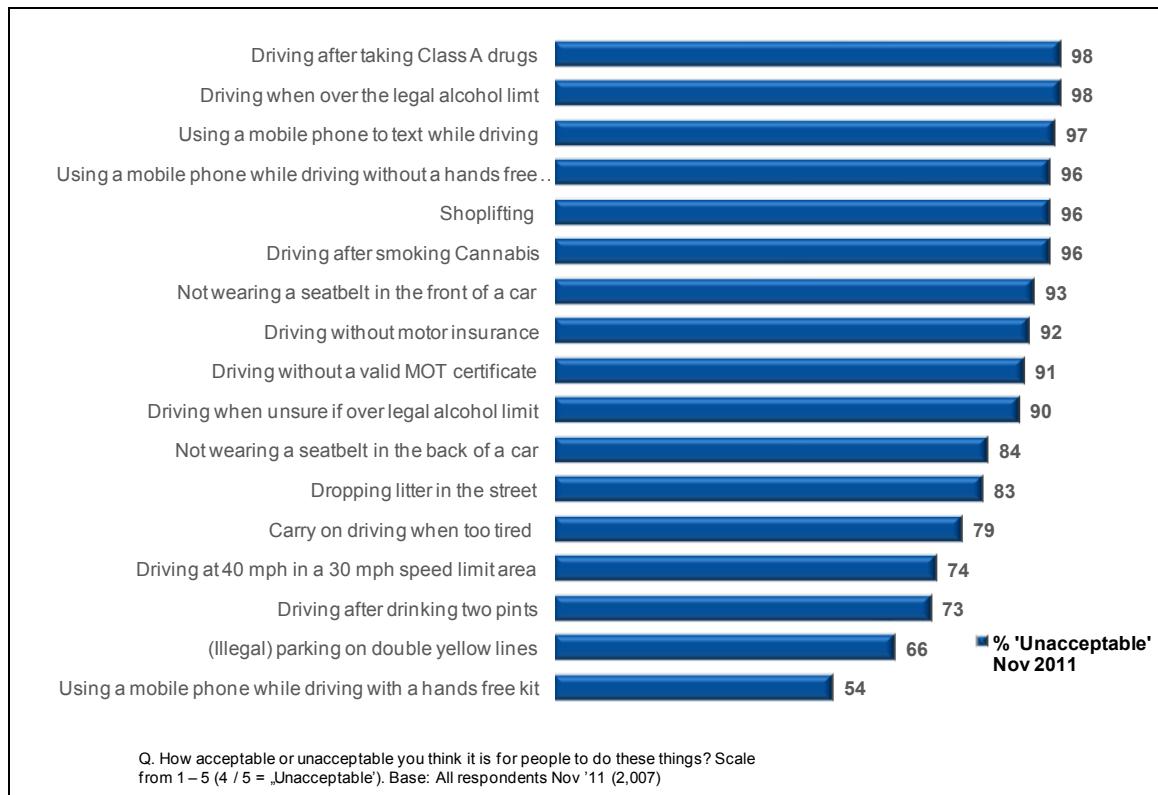


Perhaps unsurprisingly given that speeding was seen as one of the least dangerous behaviours, it is the behaviour most frequently engaged in by motorists, with half claiming to ever drive at 40mph in a 30mph zone. Indeed, just under a third (31%) claimed to drive at 90mph on a motorway when there is no traffic whilst 26% claimed to drive too fast for the conditions.

At the other end of the scale, very few motorists claimed to ever drive after taking class A drugs (1%), without insurance (1%) or after smoking cannabis (2%). Whilst almost one in ten (8%) claimed to drive when unsure if they are over the legal alcohol limit, only 3% claimed to actually drive when over the legal limit.

Finally on dangerous behaviours overall, all respondents were asked how acceptable they thought it was for people to carry out each of the behaviours. Chart 4c shows the level of those regarding each behaviour as „unacceptable” in November 2011. This list includes some non road safety related issues in order to put them in broader context.

Chart 4c – Extent to which think behaviours are unacceptable



There is almost universal unacceptability of a number of behaviours. The behaviours which were previously regarded as dangerous (Chart 4a) are also seen to be unacceptable, which is to be expected. Driving after taking Class A drugs and driving when over the legal alcohol limit are both deemed as unacceptable by 98% whilst the two mobile phone related behaviours of texting whilst driving and using a mobile phone without a hands free kit whilst driving are seen as unacceptable by 97% and 96% respectively. At the other end of the scale however, the remaining mobile phone behaviour, using one with a hands free kit, is seen to be unacceptable by the lowest number for any behaviour (54%).

Interestingly, although there is almost universal unacceptance of driving when over the legal alcohol limit, unacceptance of driving when unsure if over the legal alcohol limit is lower, at 90% and not drinking after two pints was deemed to be unacceptable by 73%, suggesting this is not deemed to be over the legal alcohol limit by a significant minority. A similar proportion did not deem driving at 40mph in a 30mph zone unacceptable despite this being clearly illegal although it is the behaviour people were most likely to admit to. Whether people think it is acceptable because they do it or they do it because it is acceptable is unclear but there is a relationship.

5. Dangerous driving behaviours: issue by issue

Whilst Section 4 aimed to look at dangerous driving behaviours relative to each other, Section 5 of this report will look at each of the dangerous driving behaviours individually in order to look at trends over time. Each issue is addressed separately in the sub sections which follow.

The issues will be reviewed by firstly looking at how dangerous they are perceived as being, how many people respondents believe they know who take part in each behaviour and finally, how frequently (if at all) respondents themselves take part in the behaviour.

It is important to look at awareness of how often others participate in a behaviour, whether this be perceived or actual, as this can influence how likely you are to do something. On each of the behaviours, we recorded a drop in the number saying they know people who do each of these driving behaviours. This is partly due to the fact that traditionally, we see fluctuations over time on this measure and also that due to a change in the way the questions were asked of respondents at this wave with the don't know option being more visible leading to higher don't know responses, we may have seen more changes than might otherwise be expected. As such, we would recommend caution with the interpretation of these measures and instead would look to see what, if any, change this has had following the next wave of research.

5.1 Drinking Driving

The first issue to be addressed is drink driving, which, compared to other issues, was perceived to be one of the most dangerous behaviours. Charts 5a to 5c show the perceived danger of drink driving amongst all respondents, motorists and non motorists.

5.1.1 Attitudes towards drink driving

Chart 5a – Perceived danger of drink driving – All respondents

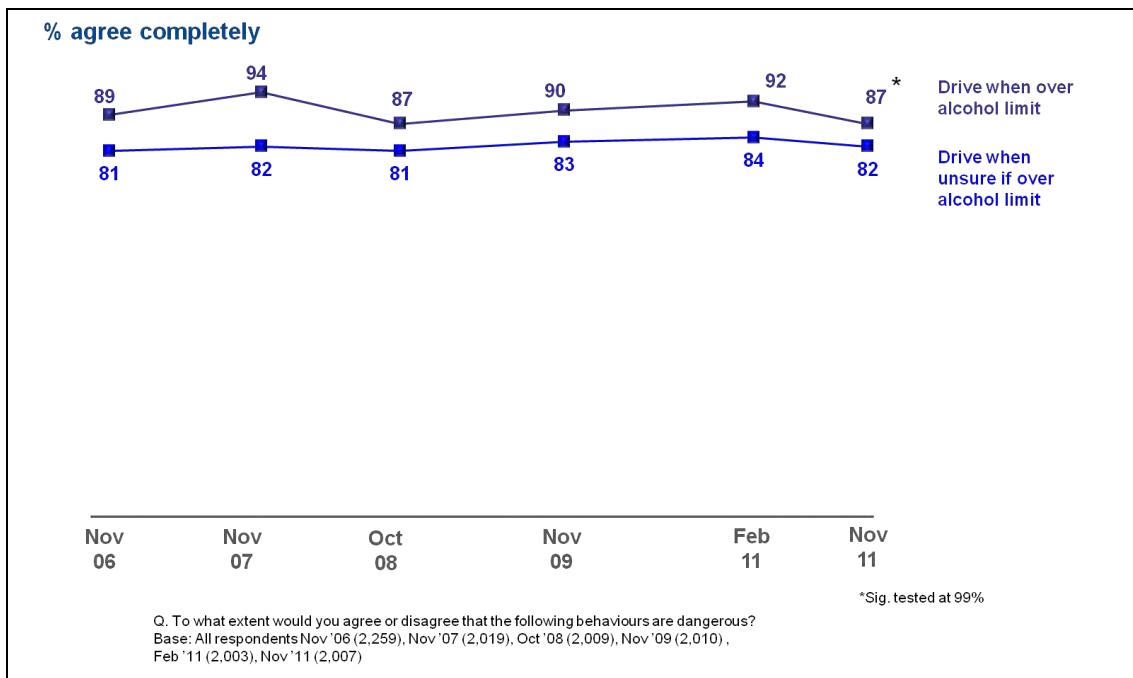


Chart 5b – Perceived danger of drink driving – All motorists

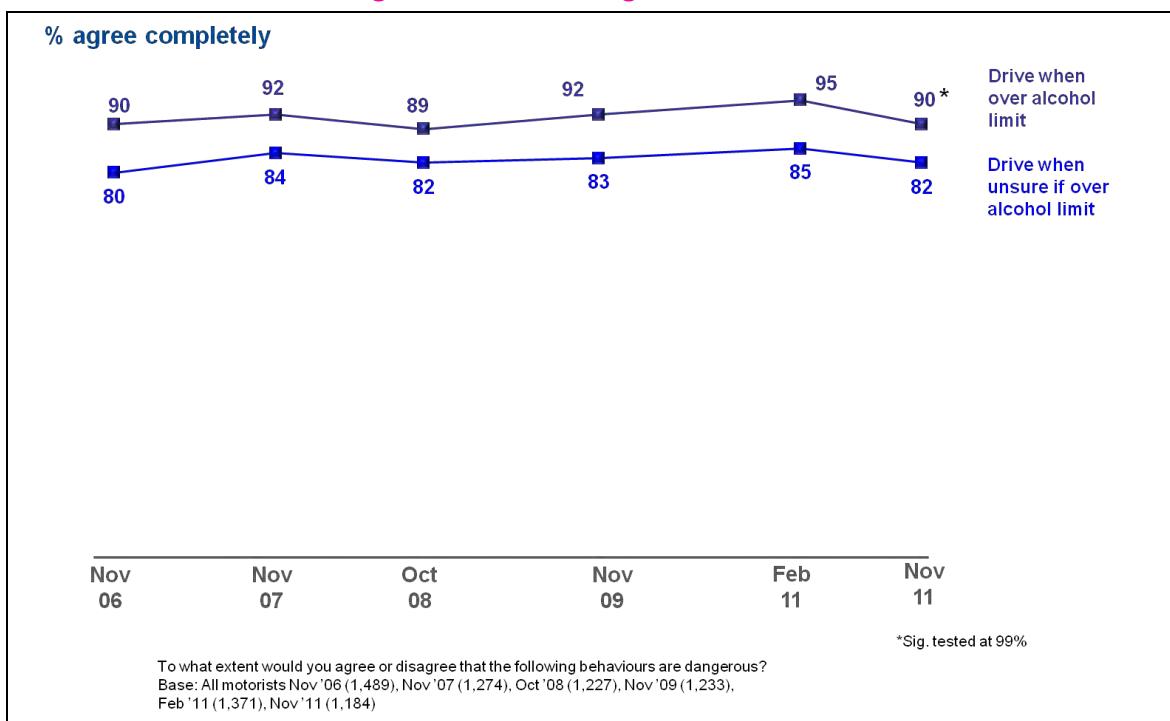
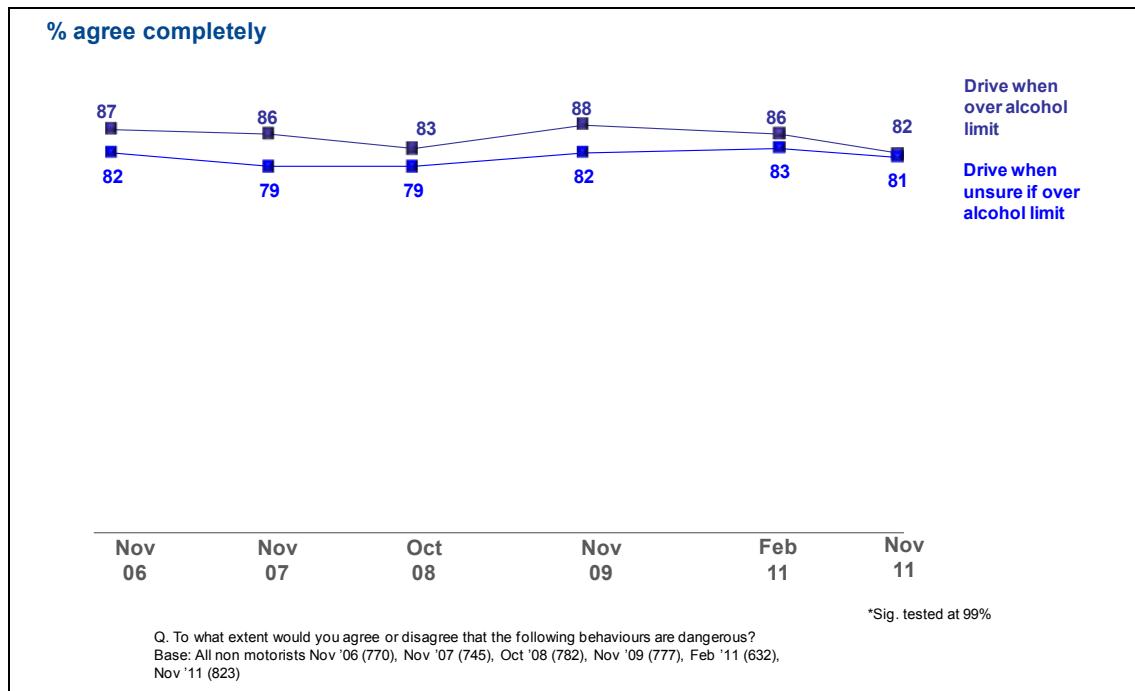


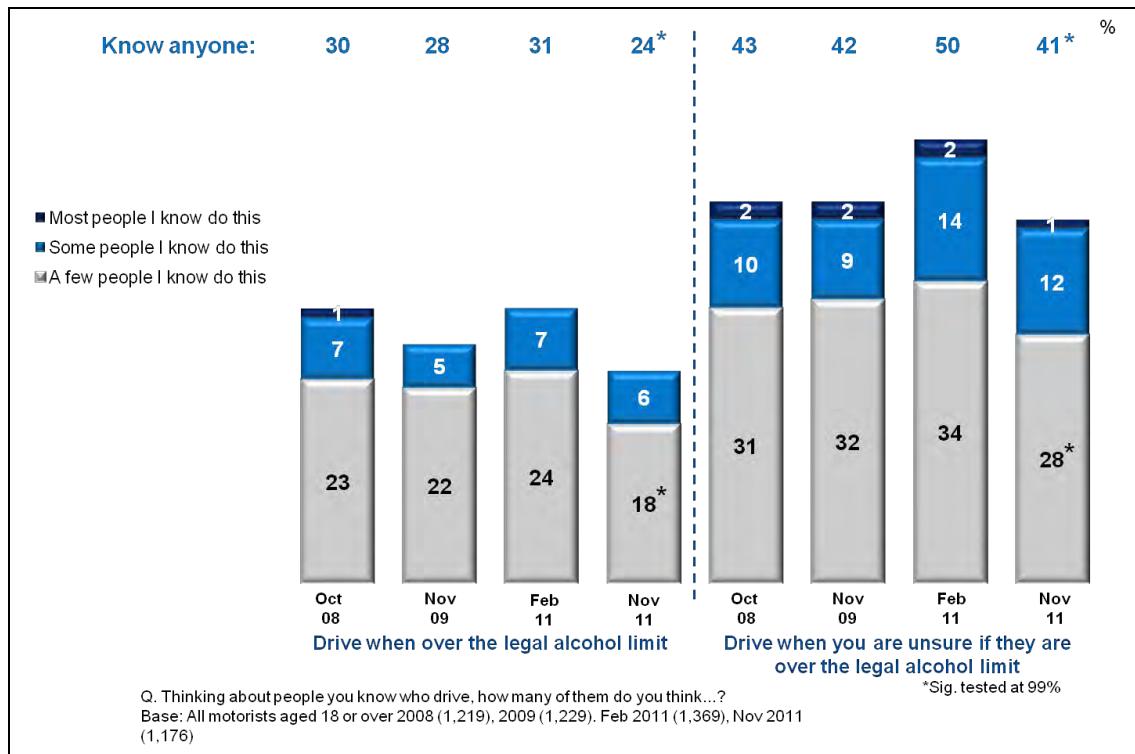
Chart 5c – Perceived danger of drink driving – All non motorists

Although agreement has remained high that driving when over the alcohol limit is dangerous, it has in fact decreased significantly since February 2011, from 92% to 87%. This is now the lowest level since October 2008. However, motorists are more likely to agree with this statement than non motorists (90% compared with 82%) although the drop from the previous wave is significant amongst motorists.

Slightly fewer agree that it is dangerous to drive when unsure if over the limit and this again is at a lower level than February 2011, albeit not significantly lower. Amongst the main demographic groups, the only significant difference on this measure is that females are more likely to agree strongly (85% compared with 79% of males).

As explained previously, there were some differences in the way the question around how many people you know participate in each of the behaviours was asked and as such, caution should be taken when looking at the results. However, Chart 5d shows the results to this measure on the issues relating to drink driving.

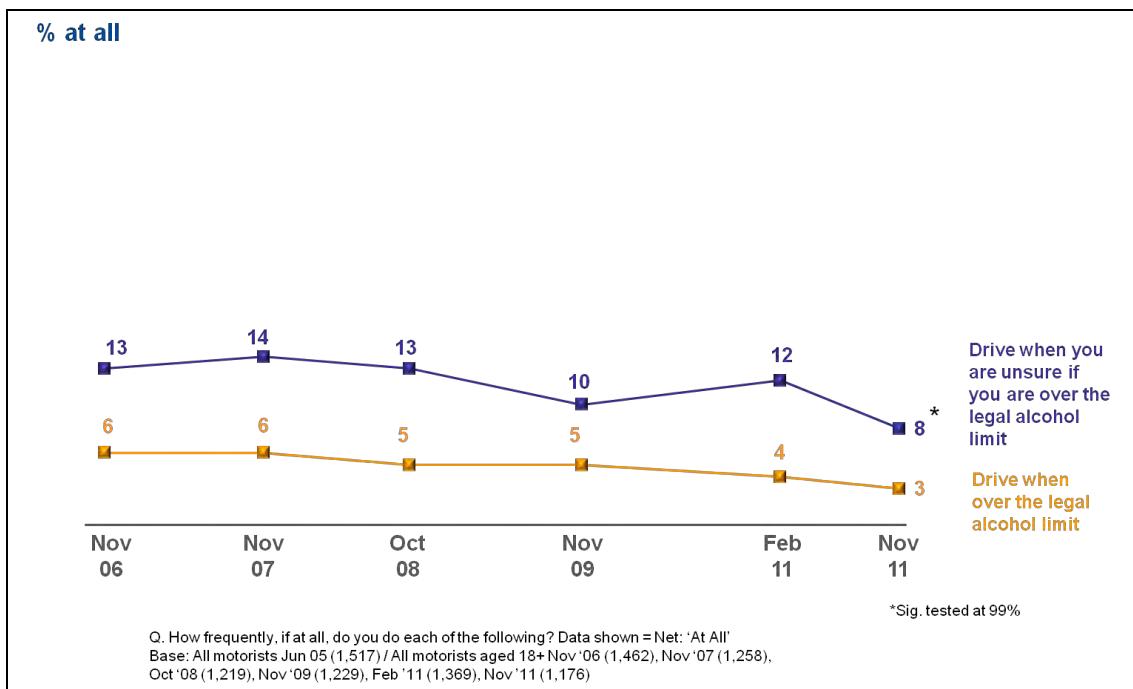
Chart 5d – Perceived prevalence of dangerous driving behaviour: drink driving



Around a quarter (24%) at the latest wave thought that they knew someone who drove when over the legal alcohol limit. However, the number rises considerably in terms of those who know someone who drives when they are unsure if they are over the legal alcohol limit, with 13% stating that at least some people they know do this and two fifths (41%) in total claiming they know someone who does this, even if just a few people they know.

The perceived prevalence of these drink driving behaviours is higher amongst 17-29 year olds than 55+ year olds specifically. Those who know someone who drives over the legal alcohol limit is 50% amongst 17-29 year olds compared to 32% of those aged 55+. The other demographic group where there was a difference on this measure was ABC1s being more likely to know someone (43%) than C2DEs (38%). In terms of knowing people who drive when they are unsure if they are over the limit, 34% of 17-29 year olds claim to know someone compared to only 20% of 55+ year olds.

Finally, respondents were asked how frequently they themselves participate in the behaviours. Chart 5e shows the results to this measure.

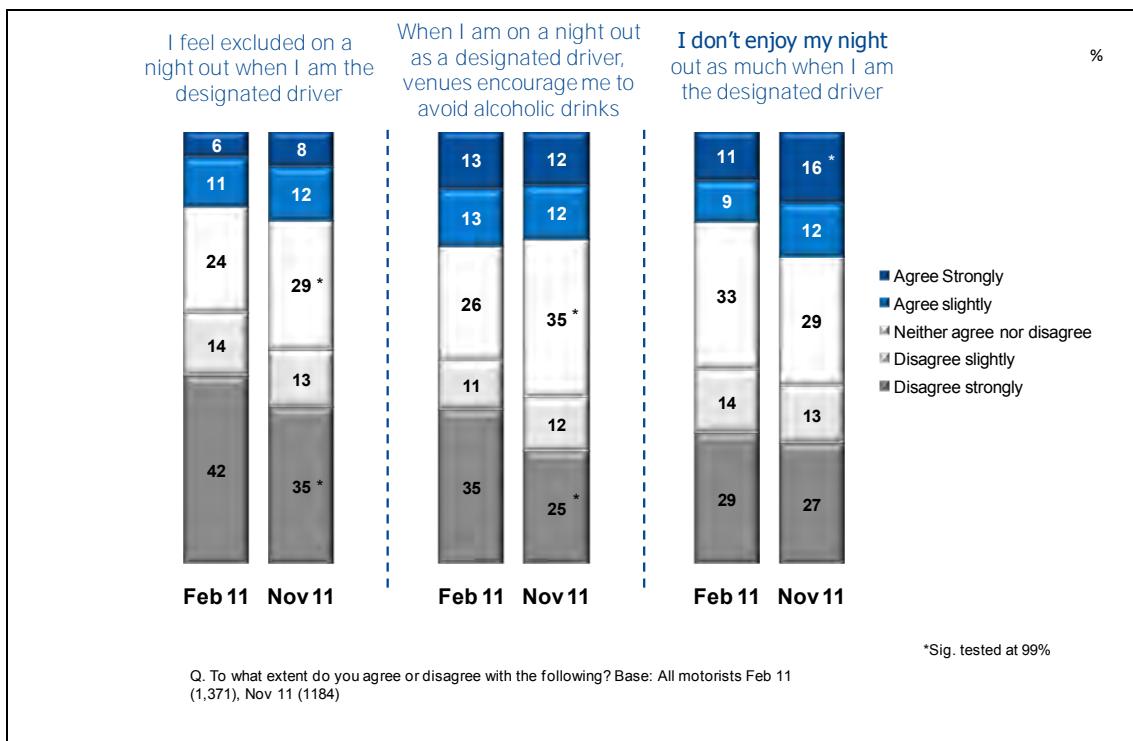
Chart 5e – Prevalence of dangerous driving behaviour: drink driving

The prevalence of those claiming to drive when unsure if they are over the legal alcohol limit decreased significantly at the latest wave, from 12% to 8%. This is the lowest level recorded on this measure since tracking began. There also continues to be a very low number claiming to drive when over the legal alcohol limit, at 3% at the latest wave, also the lowest point since tracking began.

5.1.2 Designated drivers

In order to understand how motorists feel as designated drivers when they are not drinking, motorists were asked how much they agreed or disagreed with three statements relating to being a designated driver. Chart 5f shows results for this measure.

Chart 5f – Agreement with Designated Driver statements



A significant minority agreed with each of the statements relating to designated driver status showing that for some it is a difficult role. Specifically, a fifth (20%) agreed that they feel excluded on a night out when they are the designated driver and almost three in ten (28%) claimed that they don't enjoy their night out as much when they are the designated driver. There has been no real change in this measure since February 2011.

There seems to be mixed awareness of venues encouraging designated drivers to avoid alcoholic drinks. Although 24% agreed with this statement, 37% disagreed with it and a further 35% were unsure. There is clearly therefore at least a perception amongst a significant minority that venues do not encourage the avoidance of alcoholic drinks.

5.2 Drug driving

Drug driving was a campaign which last aired in 2009 and therefore it has been a number of years since the subject was last supported by advertising. Drug driving was a behaviour which recorded very high levels of being dangerous compared to other behaviours. Charts 5g, 5h and 5i show how agreement with this statement has changed over time amongst all respondents, motorists and non motorists.

Chart 5g – Perceived danger of drug driving – All respondents

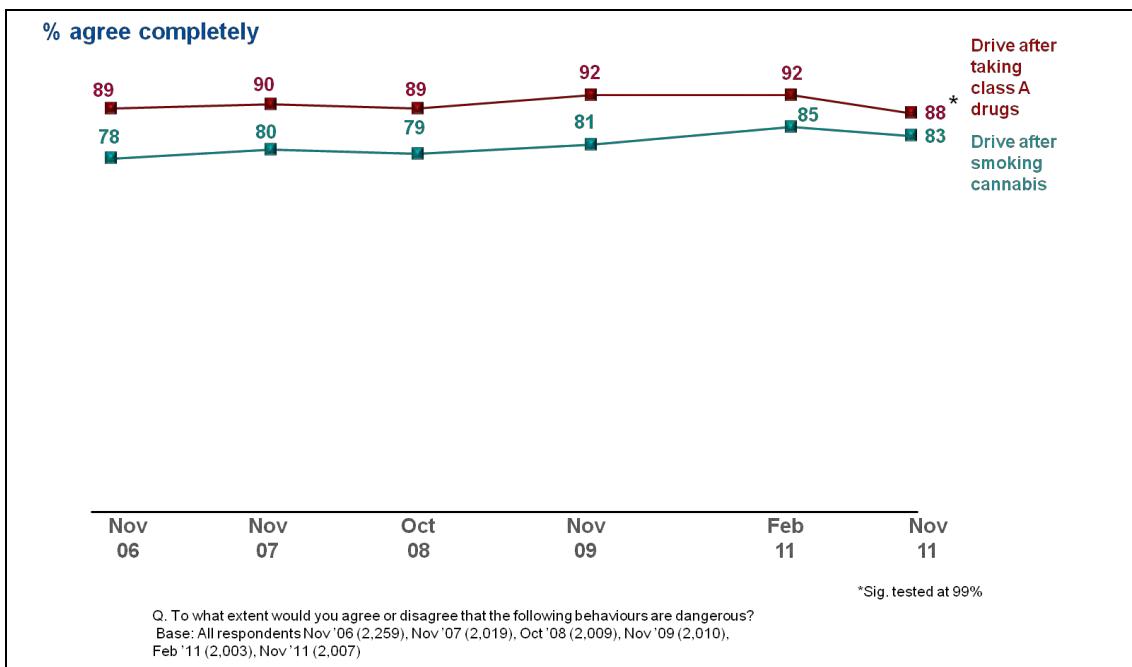


Chart 5h – Perceived danger of drug driving – Motorists

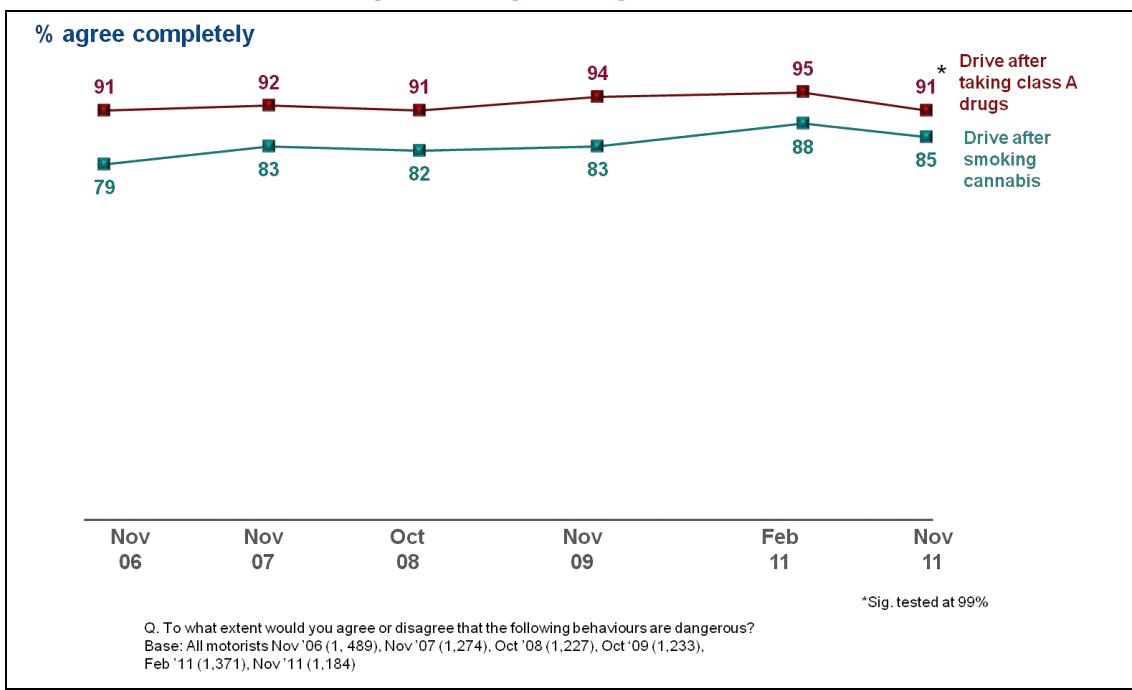
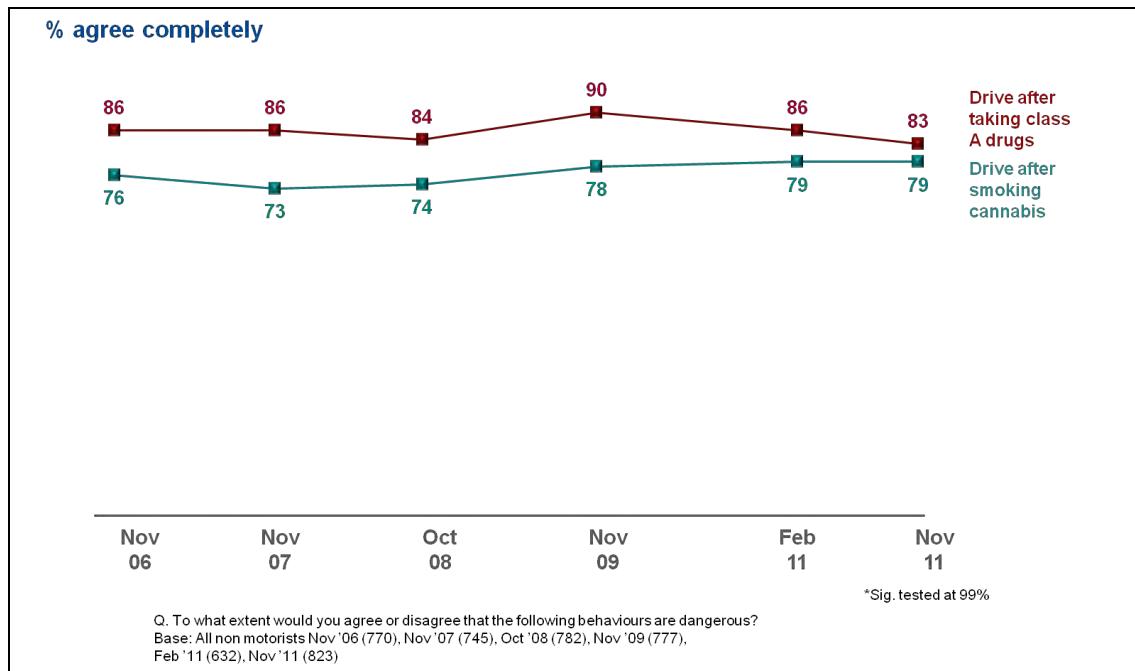


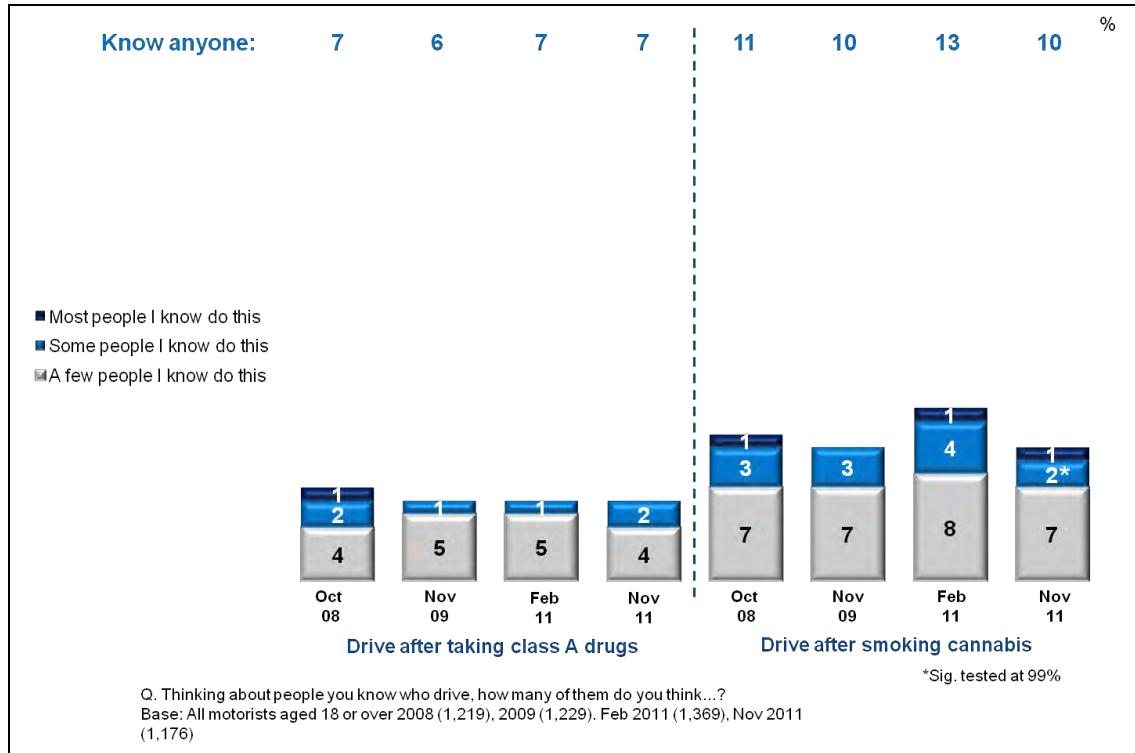
Chart 5i – Perceived danger of drug driving – Non motorists

Despite the very high level of agreement, there was a significant decrease in the number of respondents overall and motorists specifically who completely agreed that driving after taking Class A drugs was dangerous at this latest wave. Amongst non motorists, the level decreased but not significantly. These decreases have however brought the levels of agreement down to a level on a par with those recorded prior to the last burst of the drug driving campaign prior to 2009, suggesting any impact of the campaign has now dissipated. The main demographic difference on this measure was in terms of social class with 90% of ABC1s perceiving it as more dangerous compared to 87% of C2DEs.

Driving after smoking cannabis is, as would be expected, regarded as less dangerous than driving after taking Class A drugs, amongst all groups. There has been no real change in this level of agreement since the last wave. The older age group are more likely to perceive this behaviour as dangerous (86% aged 45+ compared to 76% of those aged 16-29).

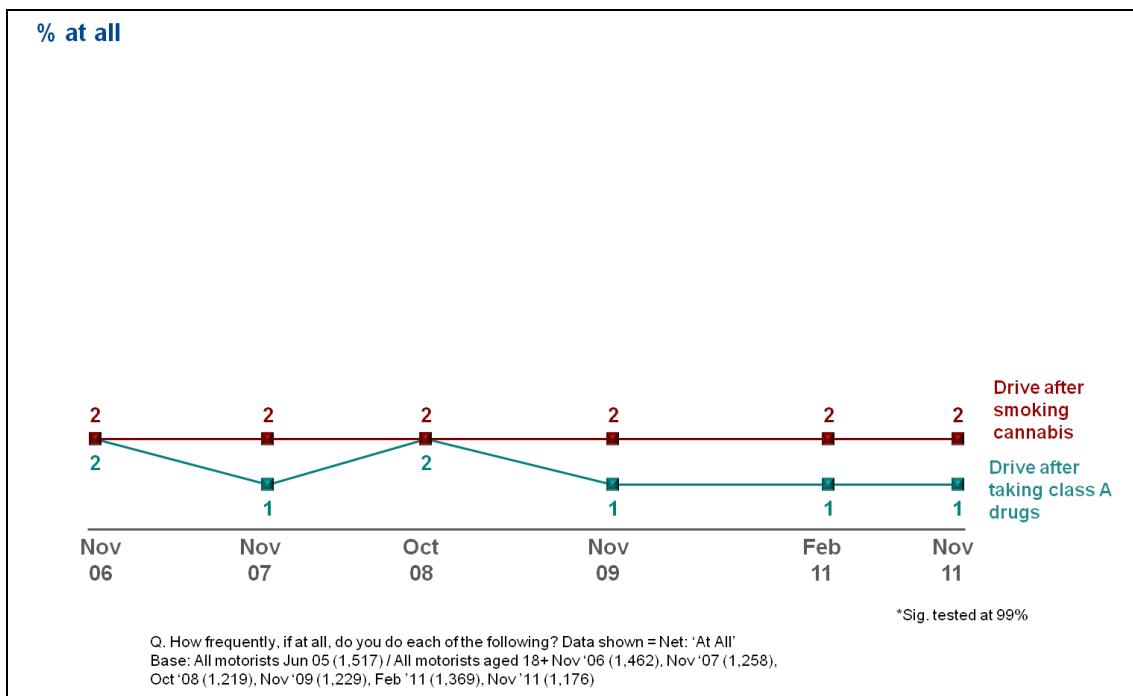
Chart 5j shows how frequently respondents think people they know take drugs whilst driving.

Chart 5j – Perceived prevalence of dangerous driving behaviour: drug driving



As with previous waves, there are very few respondents who think that people they know take drugs and drive. Only 7% claim that someone they know drives after taking Class A drugs and one in ten claims to know someone who drives after taking cannabis. Given the nature of these behaviours, these levels are unsurprising and demonstrate that they are a minority behaviour.

The main demographic differences in terms of those who know someone who takes drugs then drives is that more males know someone than females (9% compared with 4% for class A drugs and 12% compared with 7% for cannabis). There is also a progression through the age groups with the older you get, the less likely you are to know someone. For class A drugs this ranges from 14% amongst 16-29 year olds to 3% for 55+ and for cannabis, this ranges from 27% amongst 16-29 year olds to 4% amongst 55+ year olds.

Chart 5k – Prevalence of dangerous driving behaviour: drug driving

In line with what people they know do, the frequency of individuals themselves taking drugs and driving is very low, at 2% for driving after smoking cannabis and 1% after taking Class A drugs. There has been very little movement in this measure over time, trending at 2% and 1% respectively.

5.3 Speeding

The speed „Live with it“ campaign first ran in February 2009, with the most recent burst in January 2010. As such, there was almost a two year gap between the last time the campaign ran and the most recent wave of research.

For speeding, a number of different dangerous driving behaviours are looked at: driving too fast for the conditions, driving at 40 mph in a 30mph area and driving at 90mph on a motorway with no traffic.

Chart 51 – Perceived danger of speeding – All respondents

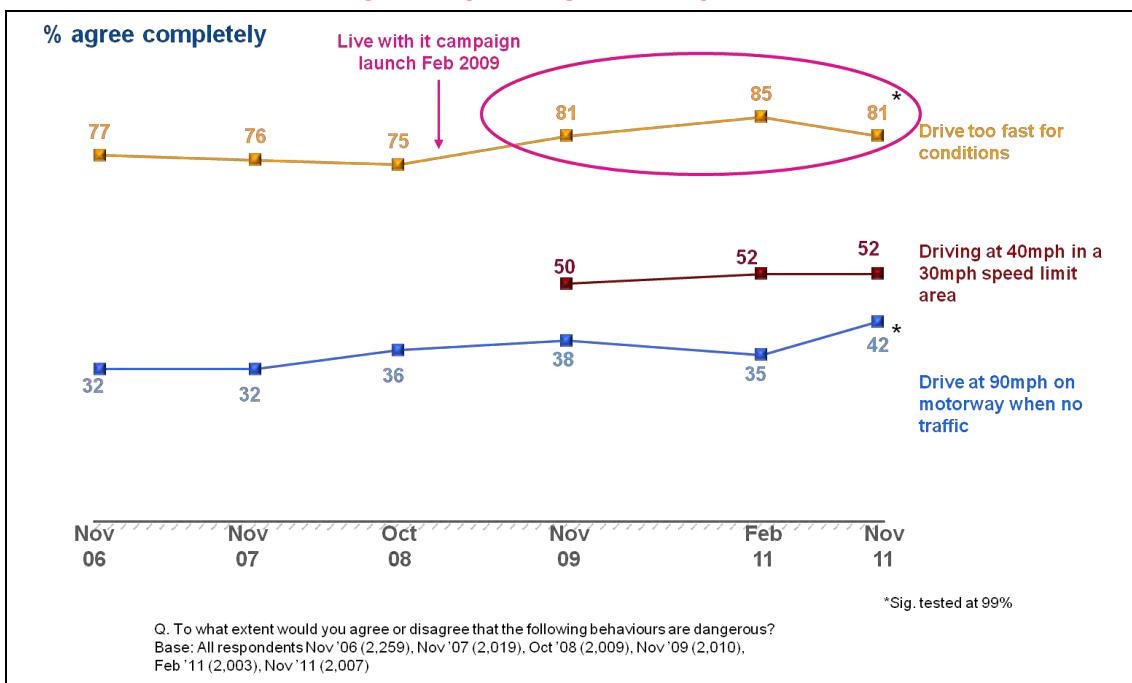
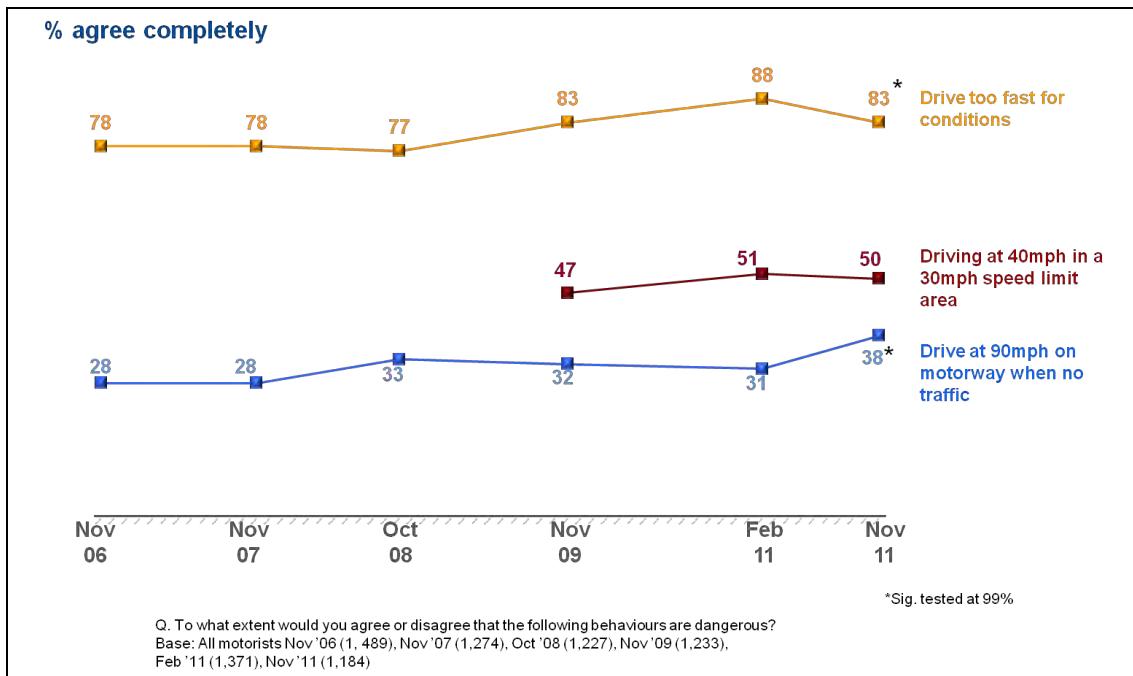
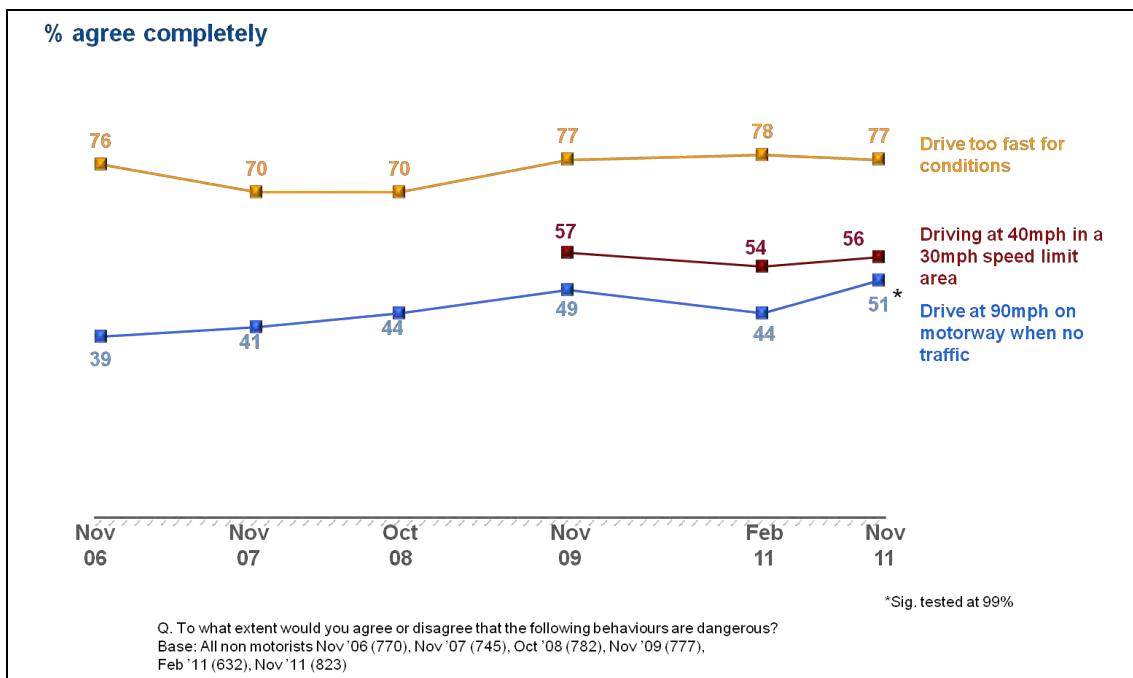


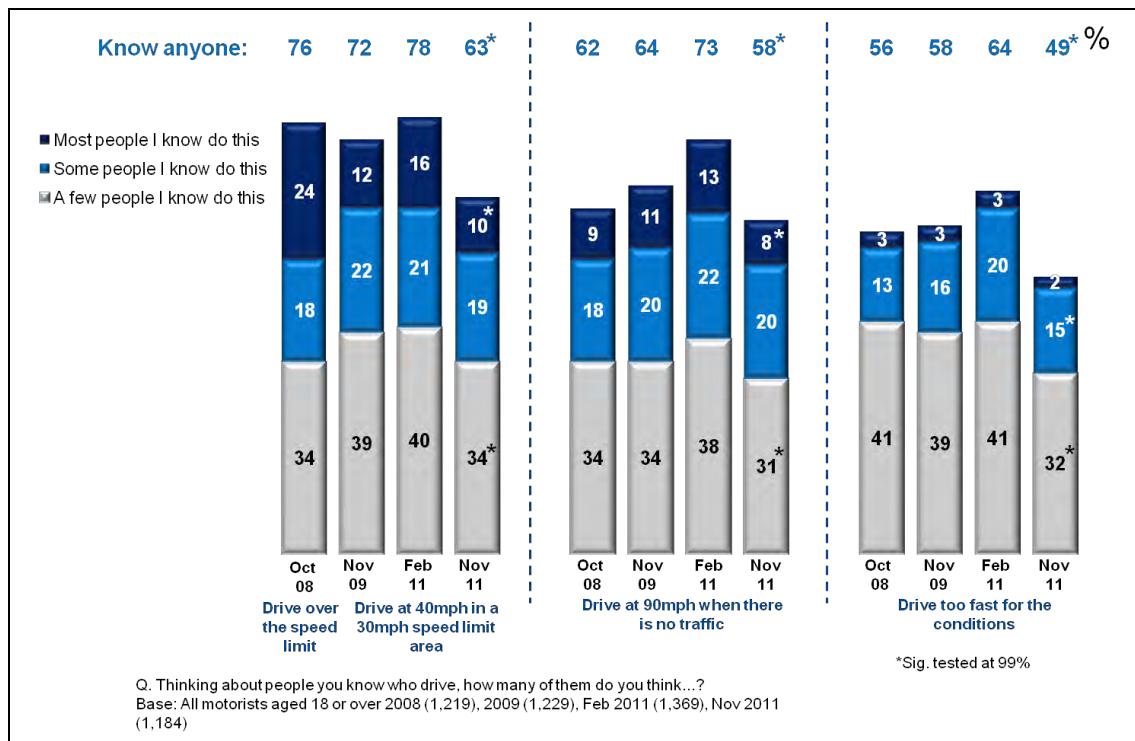
Chart 5m – Perceived danger of speeding – Motorists**Chart 5n – Perceived danger of speeding – Non motorists**

Driving too fast for the conditions has consistently been regarded as the most dangerous of the three speeding behaviours asked about. At this latest wave however there has been a significant drop in terms of those agreeing completely that this is dangerous (from 85% to 81%). However, this is still a higher level than that recorded prior to the „Live with it” campaign. A similar picture was recorded amongst motorists and non motorists.

The perceived danger of driving at 40mph in a 30mph area has remained on a par across the most recent waves, recording 52% at the latest wave. The one speeding behaviour for which the perceived danger has increased significantly over time, and indeed, reaching the highest level of agreement since tracking began, was driving at 90mph on the motorway when there is no traffic. This reached a level of 42% at the latest wave, up from 35% in February 2011. Although both motorists and non motorists recorded a significant increase on this measure, the level of agreement is highest amongst non motorists (51% compared with 38%) and indeed, reach majority agreement for the first time.

Demographically, older respondents are more likely to deem driving too fast for the conditions as dangerous (84% amongst 45+ year olds compared to 77% of 16-34 year olds). For the other two measures, females are more likely than males to regard them as dangerous (58% compared with 46% for driving at 40mph and 49% compared with 36% for driving at 90mph on a motorway when there is no traffic).

Chart 50 – Perceived prevalence of dangerous driving behaviour: speeding

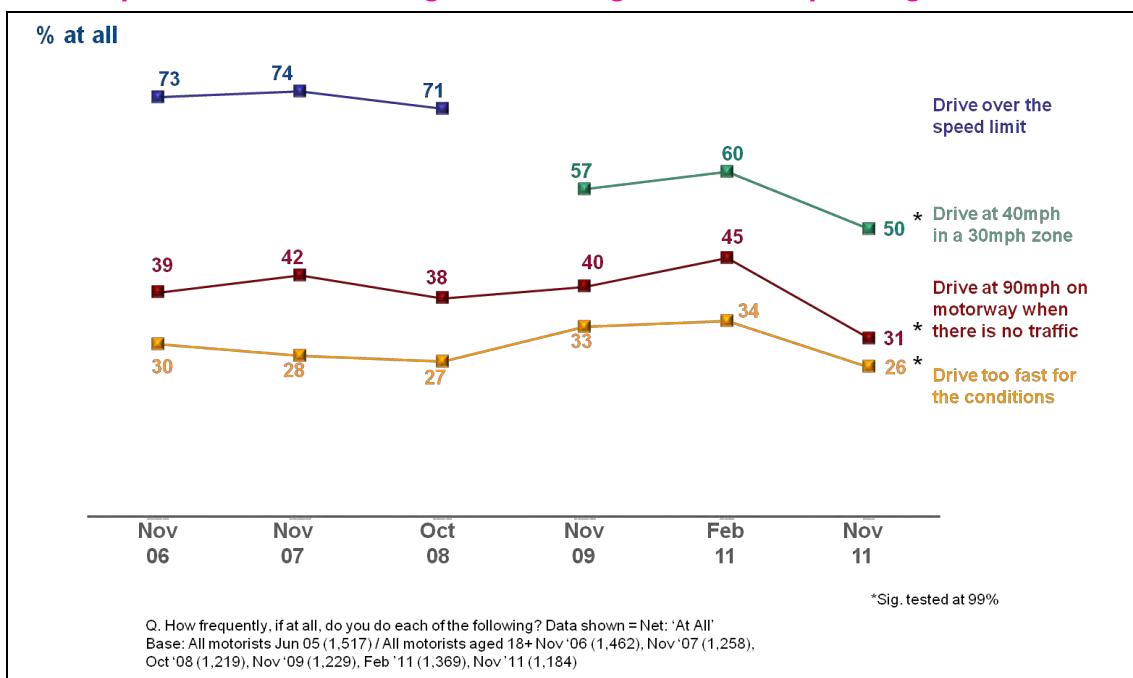


Looking at how many people respondents know who undertake each behaviour, speeding is seen to be a much more widespread behaviour than drink or drug driving. Around half or more of motorists believe that they know people who undertake these behaviours.

The behaviour for which most claim to know people who do it is driving 40mph in a 30mph speed limit area (63%). This is followed by driving at 90mph on a motorway when there is no traffic (58%) and driving too fast for the conditions which 49% claimed they knew someone who did it. Although there appears to be a decrease in the numbers who knew anyone undertaking these behaviours this wave, this is the question which was asked slightly differently and so comparisons should be treated with caution.

For each of these driving behaviours at the latest wave, those of social class ABC1 are more likely to know somebody who does these. In terms of driving at 40mph in a 30mph area and driving at 90mph on a motorway when there is no traffic specifically, the younger age groups were much more likely to know somebody who does these.

Chart 5p – Prevalence of dangerous driving behaviour: speeding



In terms of behaviours individuals actually admit to themselves, the levels were all lower than for other people they know. Despite fewer people regarding the behaviours as dangerous at this wave, there has in fact been a significant decrease in those claiming to do each of them themselves. Driving at 40mph in a 30mph zone is still the most frequent claimed behaviour though has dropped from 60% in February 2011 to 50% at the latest wave. Driving at 90mph on the motorway when there is no traffic recorded the largest drop, from 45% to 31% whilst driving too fast for the conditions dropped from 34% to 26%. Claimed prevalence on each of these three measures is now at its lowest point since tracking began.

5.4 Seatbelts

Advertising for seatbelts last took place in February 2010, the „Three strikes” campaign. As such, there had been no seatbelt activity almost two years prior to the latest wave of research taking place in November 2011.

Chart 5q – Perceived danger of not wearing seatbelts – All respondents

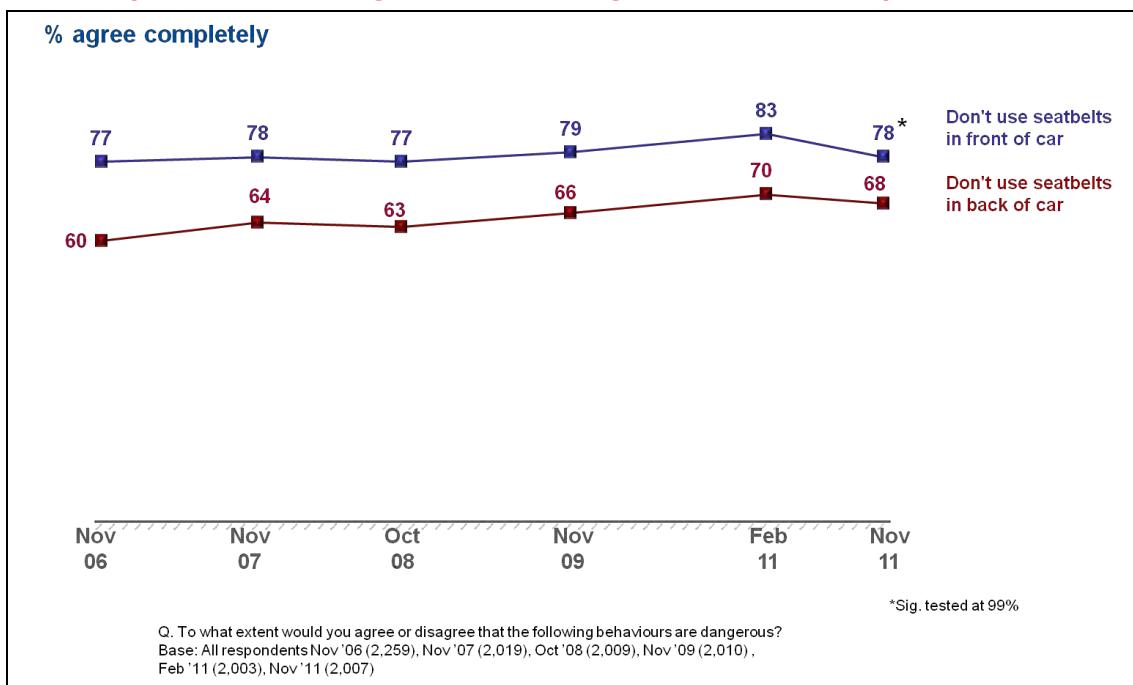


Chart 5r – Perceived danger of not wearing seatbelts – All motorists

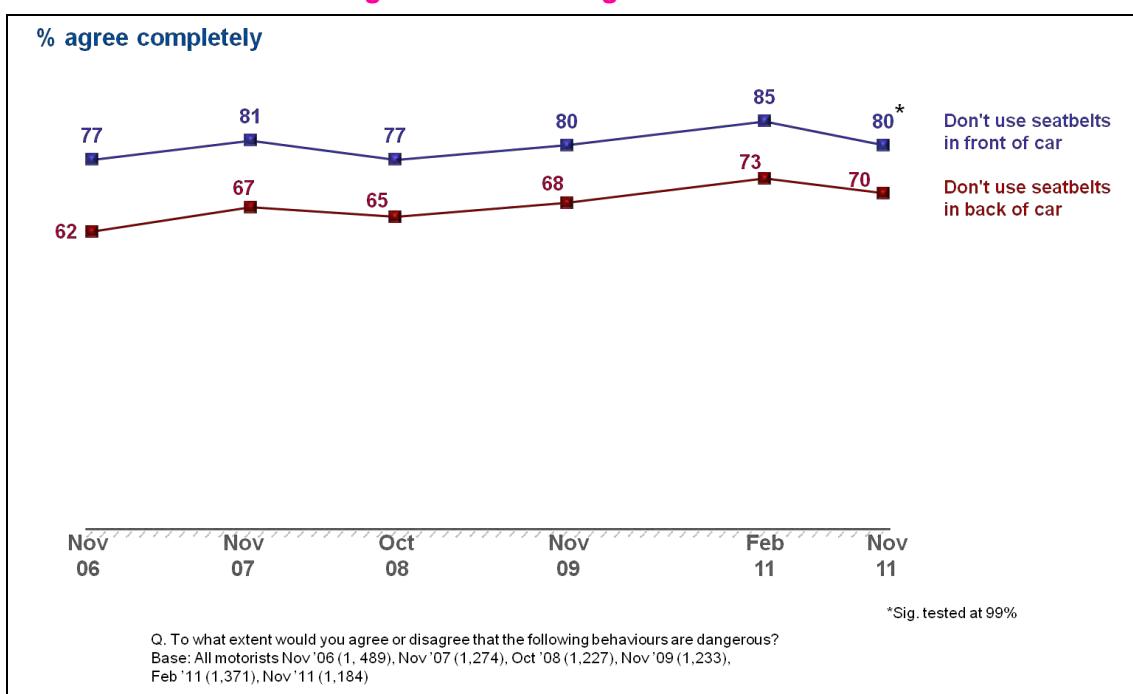
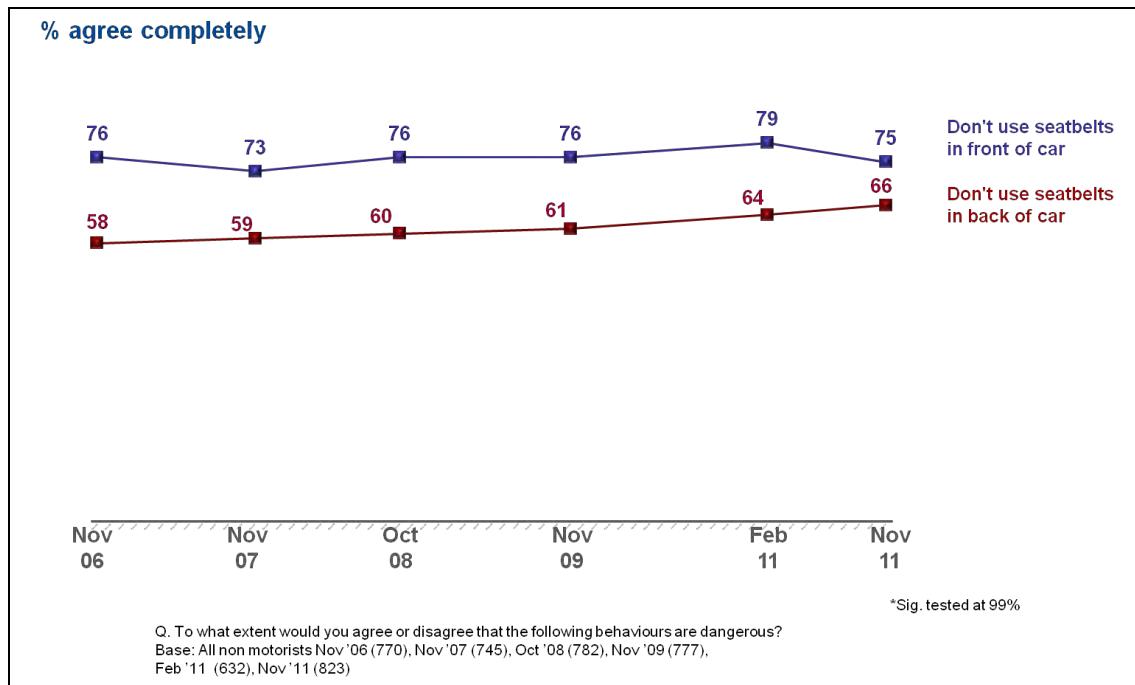


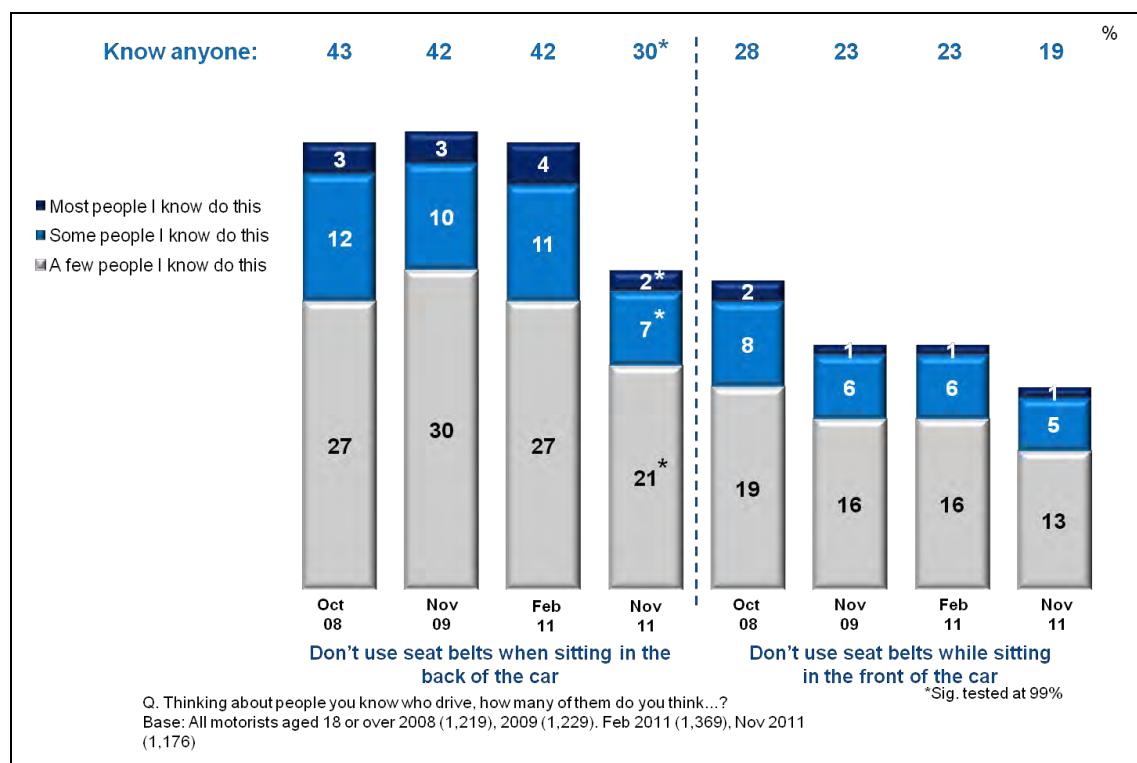
Chart 5s – Perceived danger of not wearing seatbelts – Non motorists

In February 2011 there was an increase in those completely agreeing that not using a seatbelt in the front of the car is dangerous (to 83%) but this has now returned back to previous levels of 78%, seen in 2006 to 2009. This could be due to decay in the message over time, given that the last seatbelts campaign ran in 2010. This decrease was recorded amongst all respondents, motorists and non motorists alike.

Overall, fewer believe that not using a seatbelt in the back of a car is dangerous compared to not using a seatbelt in the front of the car. This level was 68% in November 2011 and has trended around this level since 2006.

For both of these measures, females were more likely than males to perceive these as dangerous. In terms of not using seatbelts in the front of the car, 82% of females perceived this as dangerous compared to 74% of males and for not using seatbelts in the back of the car, 73% of females compared to 63% of males.

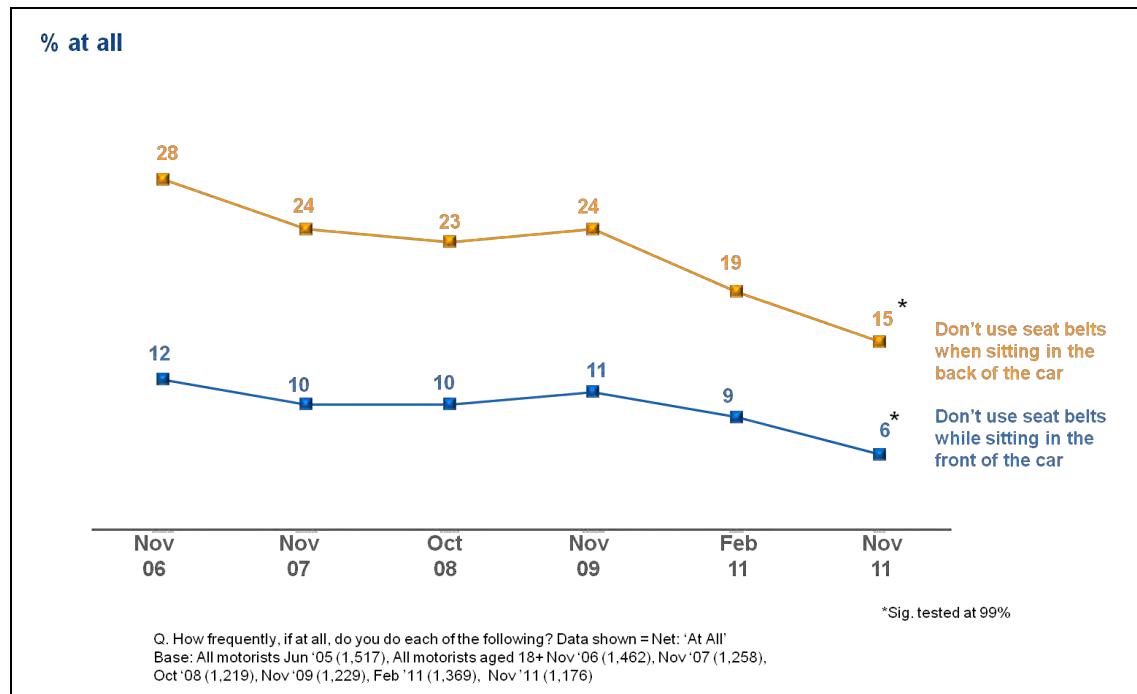
Chart 5t – Perceived prevalence of dangerous driving behaviour: not wearing seatbelts



Three in ten motorists (30%) claim to know someone who doesn't use a seatbelt in the back of the car. The level of not using a seatbelt when in the front of the car is however lower at one in five (19%) indicating that this behaviour is not as widespread, although the prevalence of backseat passengers will also be lower.

Younger motorists know someone who does not wear seatbelts compared to the older age group. For the back of the car, 41% of 18-29 year olds know someone compared to 25% of 45+ year olds whilst for in the front of the car, 36% of 16-29 year olds know someone compared to 11% of 55+ year olds. On this second measure, there was also a difference in terms of social class with 23% of C2DEs knowing someone compared to 17% of ABC1s and commuters (24%) more likely to know someone than leisure users (19%).

Chart 5u – Prevalence of dangerous driving behaviour: not wearing seatbelts



Again, despite a decrease in those agreeing that it is dangerous – the number who say that they don't wear a seatbelt in the front of the car has fallen significantly to 6% at the latest wave. This is the lowest point since tracking began.

The number not using a seatbelt in the back has also fallen to 15%, the lowest level we have seen. Both seatbelt behaviours are therefore showing a strong downward trend, despite a lack of recent seatbelts activity. This may in part be because of the younger generation taking seatbelt wearing more for granted, and as they grow up and become motorists, we are seeing this increase in seatbelt usage. However there may also be some complacency for this habitual behaviour and people are not as conscious of their own behaviour and assume they do the right thing. This is a phenomenon we saw when evaluating the *Three strikes* campaign and reported seatbelt wearing dropped after the campaign despite people saying it was impactful and made them think about their own behaviour, from which we concluded the campaign had made them examine their own behaviour and realise they didn't always wear a seatbelt.

5.5 Using a mobile phone while driving

The last mobile phone activity took place in May 2009, over two years before the latest wave of research.

Chart 5v – Perceived danger of using mobile phones when driving – All respondents

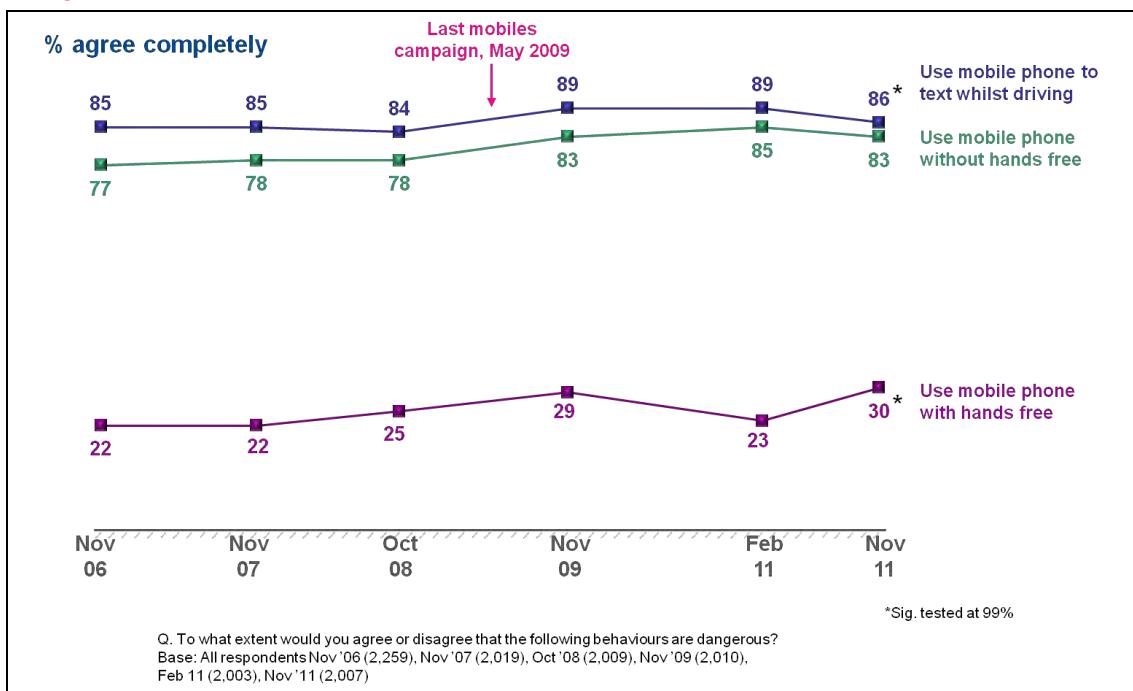
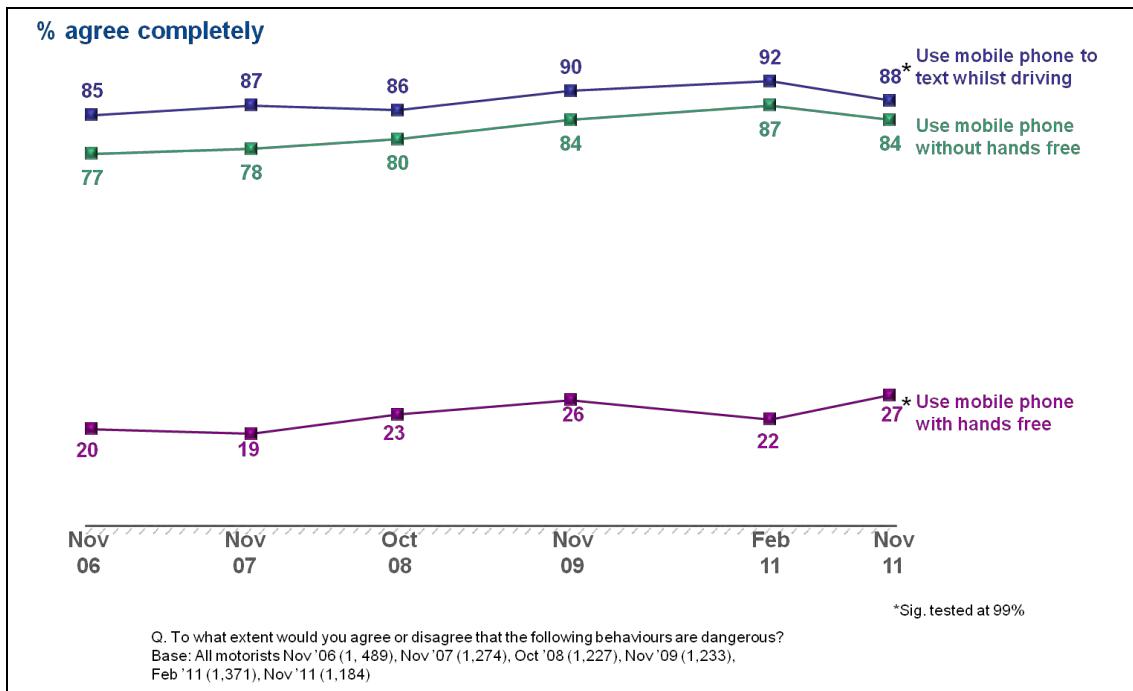
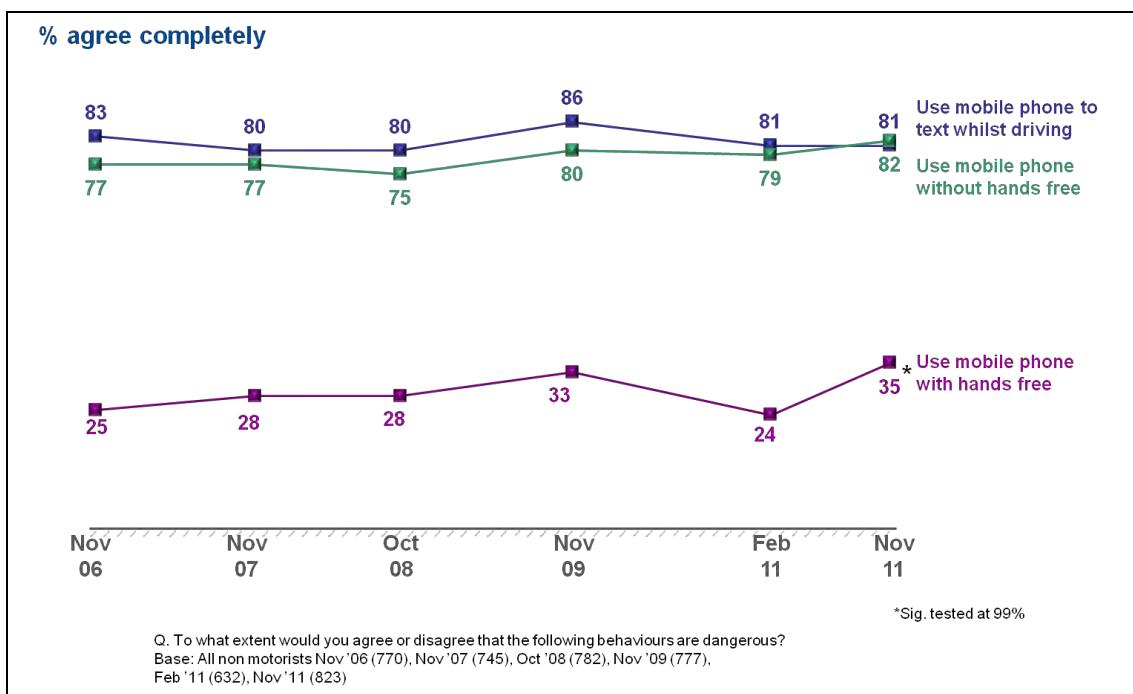


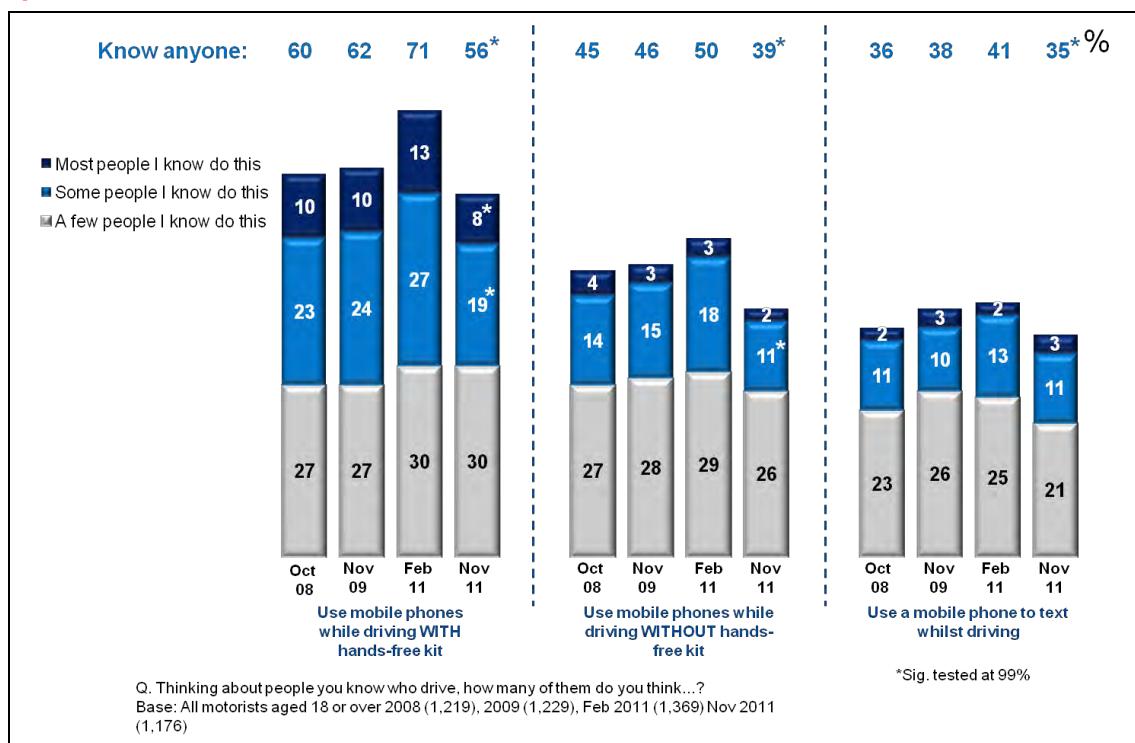
Chart 5w – Perceived danger of using mobile phones when driving - Motorists**Chart 5x – Perceived danger of using mobile phones when driving – Non motorists**

In November 2011 significantly more people – both motorists (27%), non motorists (35%), and 30% overall – thought that it is dangerous to use a mobile with handsfree kit, reaching the highest level recorded on this behaviour and showing a general upwards trend from 2006.

However, amongst motorists, there has been a drop in the number who completely agree that it is dangerous to text and a decrease in agreement that it is dangerous to use a mobile phone without a hands free kit. This is possibly as a result of lack of campaign activity, with the last national campaign having been in May 2009 or it may be the increased use of mobile phones generally as an essential part of daily life.

Perhaps due to young people having grown up with mobile phones as the norm, they are less likely on each of these measures to regard them as dangerous than the older age groups. For texting, 77% of 18-29 year olds regard this as dangerous compared to 88% of those aged 30+. For using mobile phones without hands free, 80% of 16-44 year olds regarded this as dangerous compared to 86% of those aged 45+ and for using mobile phones with a hands free, the level amongst 18-29 year olds was 21% compared to 37% of those aged 55+. There were also differences on these final two measures amongst males and females, with females more likely to perceive both as dangerous.

Chart 5y – Perceived prevalence of dangerous driving behaviour: mobile phones

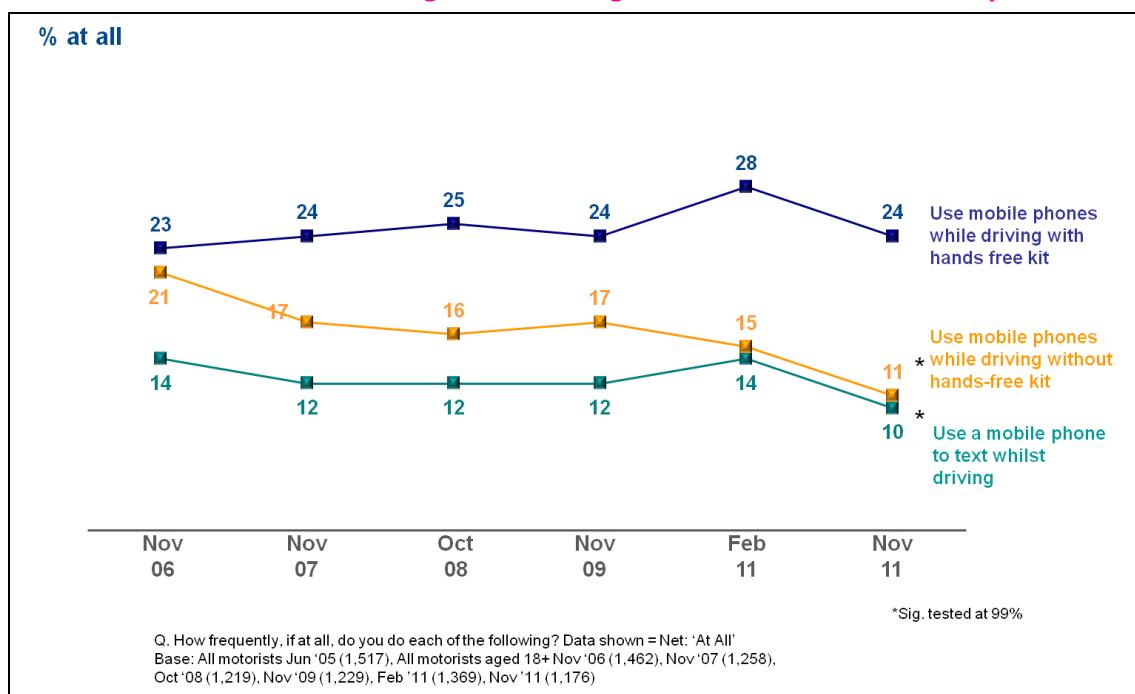


Over half of respondents (56%) claim to know someone who uses a mobile phone whilst driving, with a hands-free kit. This is the highest level for any of the mobile phone behaviours. Around two fifths (39%) know someone who uses a mobile phone whilst driving without the use of a hands free kit and perhaps more worryingly, a similar proportion (35%) know someone who uses a mobile phone to text whilst driving.

As might be expected, there were large differences on the number knowing someone conducting these behaviours by age. Younger people were much more likely to know people who participate in each of these behaviours. Those knowing someone who uses a mobile phone whilst driving with a hands free kit ranges from 69% amongst 18-29 year olds to 44% amongst 55+ year olds. Those using without a hands free kit ranges from 56% amongst 18-29 year olds to 25% amongst 55+ year olds. For texting whilst driving, the biggest difference is recorded with 55% amongst 18-29 year olds knowing someone compared to 18% amongst those aged 55+.

The one other main sub-group difference on this measure, and one which is not as apparent on other issues as much as it is on mobile phones, is in terms of those who drive for leisure compared to commuting/work. Perhaps unsurprisingly, for each of these behaviours, commuters/those who use vehicle for work are more likely to know someone who conducts these behaviours than someone who drives for leisure.

Chart 5z – Prevalence of dangerous driving behaviour: use of mobile phones



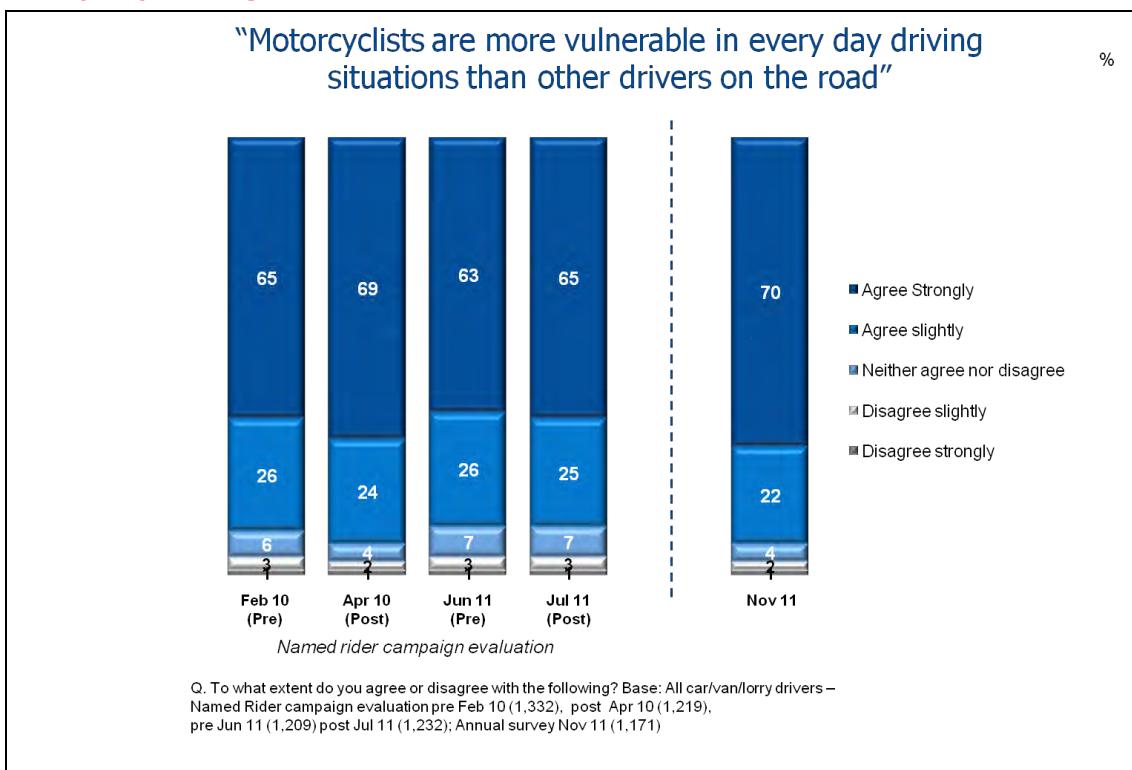
There has been a trend since 2006 in terms of fewer people admitting to using a mobile phone without a handsfree kit (11% at the latest wave) and texting whilst driving (10%). Indeed, these are both significantly lower than in February 2011 and are now at their lowest levels since tracking began, however this may reflect a greater provision of hands free options?

However the proportion who say that they use a mobile phone with a handsfree kit while driving has remained fairly stable since 2006 at 24%, despite a peak of 28% in February 2011.

5.6 Motorcycles and bicycles

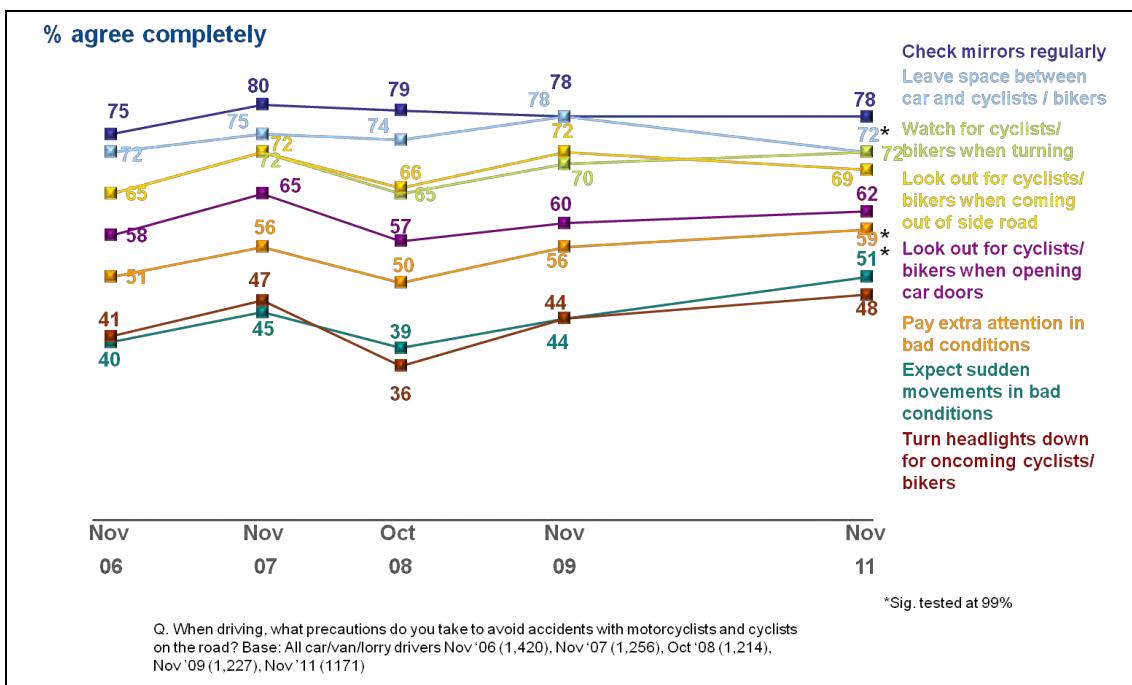
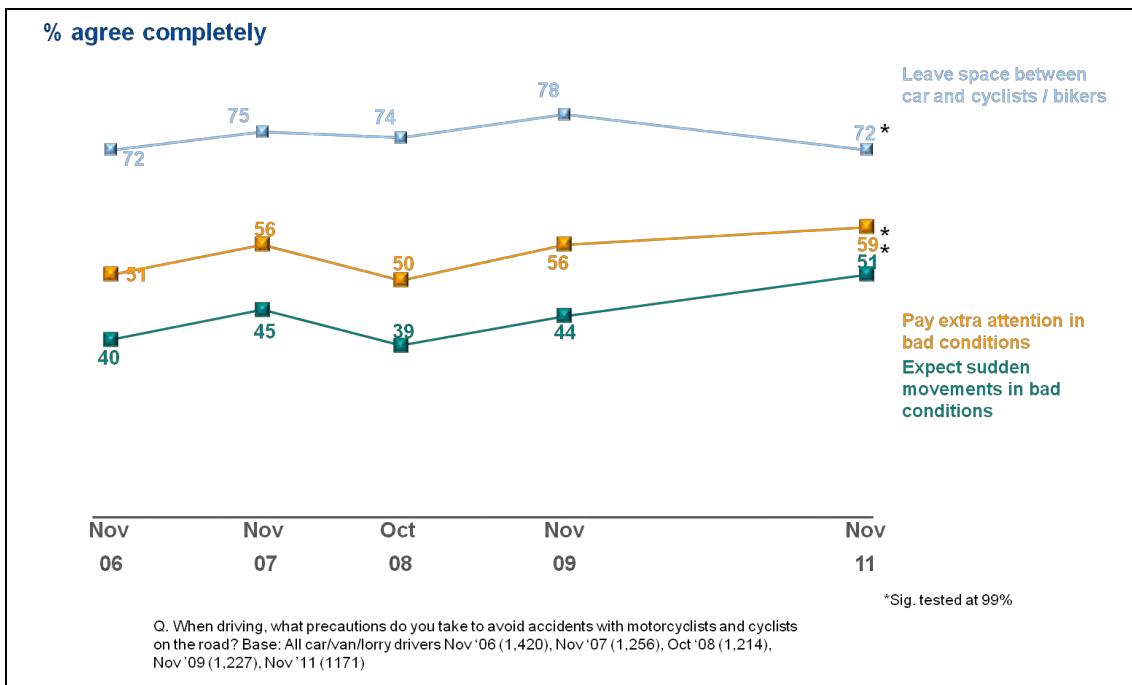
Questions asked on the subject of motorcycles are asked slightly differently to the other behaviours. Results to these measures are shown in the charts that follow.

Chart 5aa – Agreement with statement ‘Motorcyclists are more vulnerable in every day driving situations than other drivers on the road’



This question looks at drivers' agreement that motorcyclists are more vulnerable in everyday driving situations than other drivers on the road. This is the first time this has been asked on the annual survey, although we have previously asked this on the Motorcycles campaign tracking and the figures from this are shown for comparison.

There are very high levels of agreement with this statement, with 92% agreeing that motorcyclists are more vulnerable than other drivers on the road, and indeed, 70% agree strongly with this statement. There would therefore appear to be no doubt that this is the case.

Chart 5ab – Precautions take to avoid accidents with motorcycles and cyclists**(1)****Chart 5ac – Precautions take to avoid accidents with motorcycles and cyclists****(2)**

In terms of the precautions drivers take to avoid accidents with motorcyclists and cyclists, broadly, between half and three quarters of drivers take each of these precautions, something which has remained fairly stable over time. Indeed, the top five actions motorists take have remained stable over time: check mirrors regularly, leave space between car and cyclists/bikers, watch for cyclists/bikers when turning,

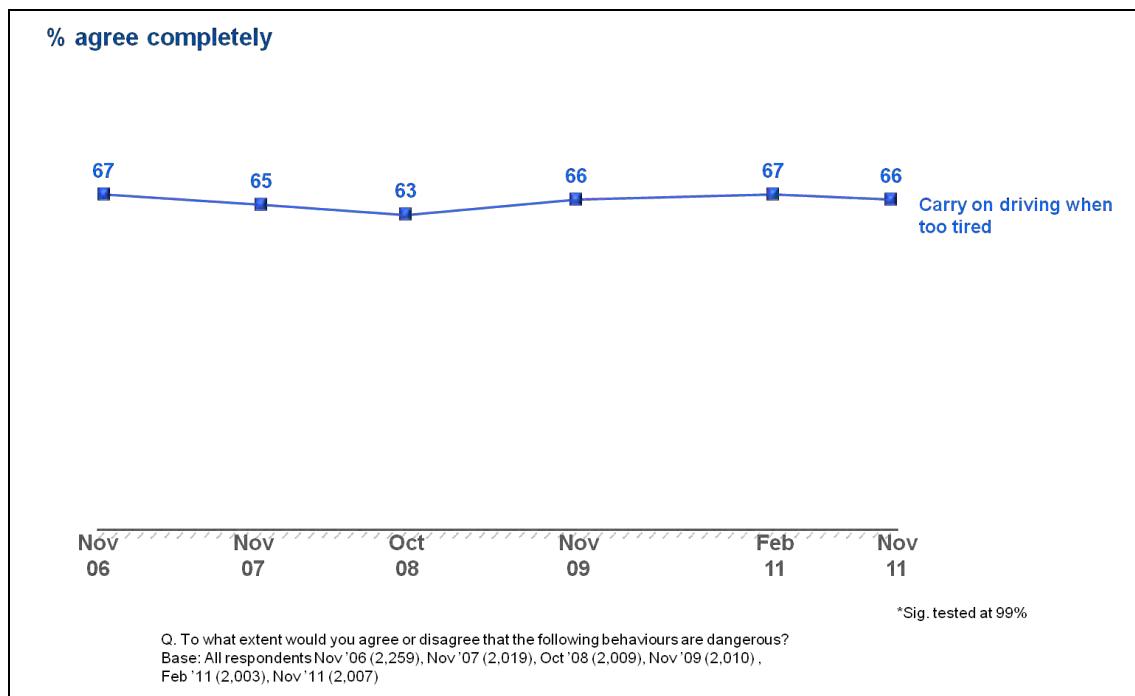
look out for cyclists/bikers when coming out of side road and looking out for cyclists/bikers when opening car doors.

There have however been a few significant changes within the precautions taken; drivers now claim to be more likely to pay extra attention and to expect sudden movements in bad conditions. However, after a peak in November 2009, agreement that they leave space between the car and bikers has returned to previous levels.

5.7 Driver fatigue

The remaining issue looked at was driver fatigue.

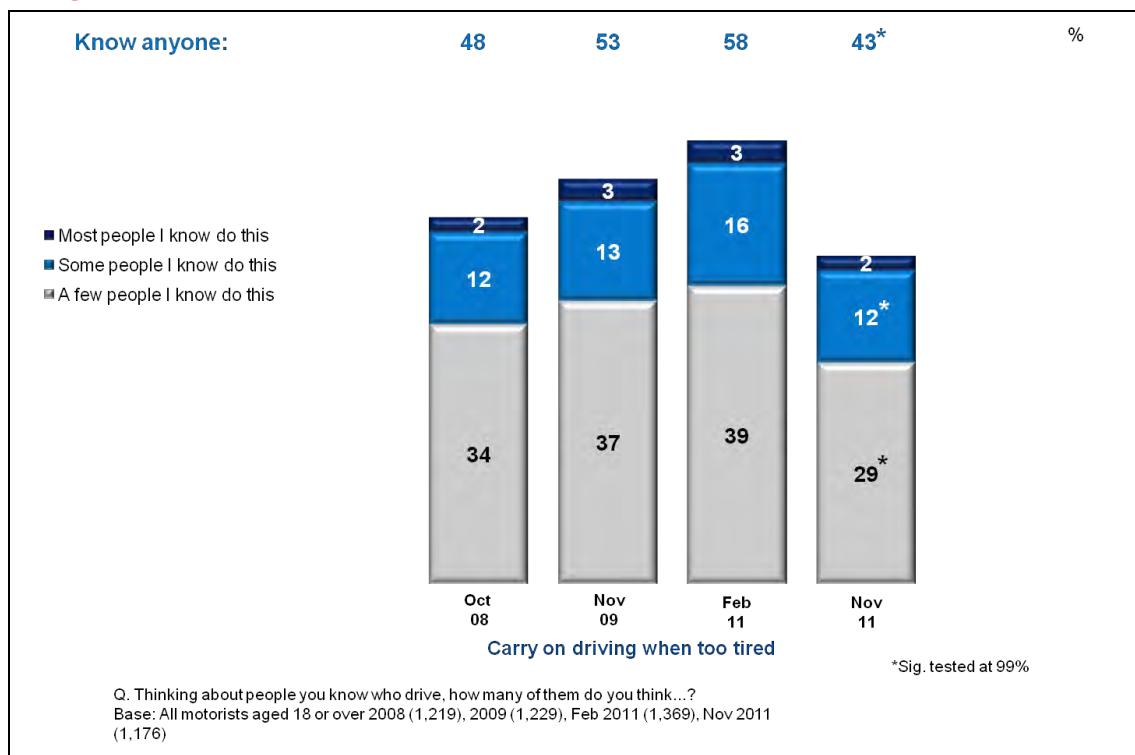
Chart 5ad – Attitudes to dangerous driving: driver fatigue – All respondents



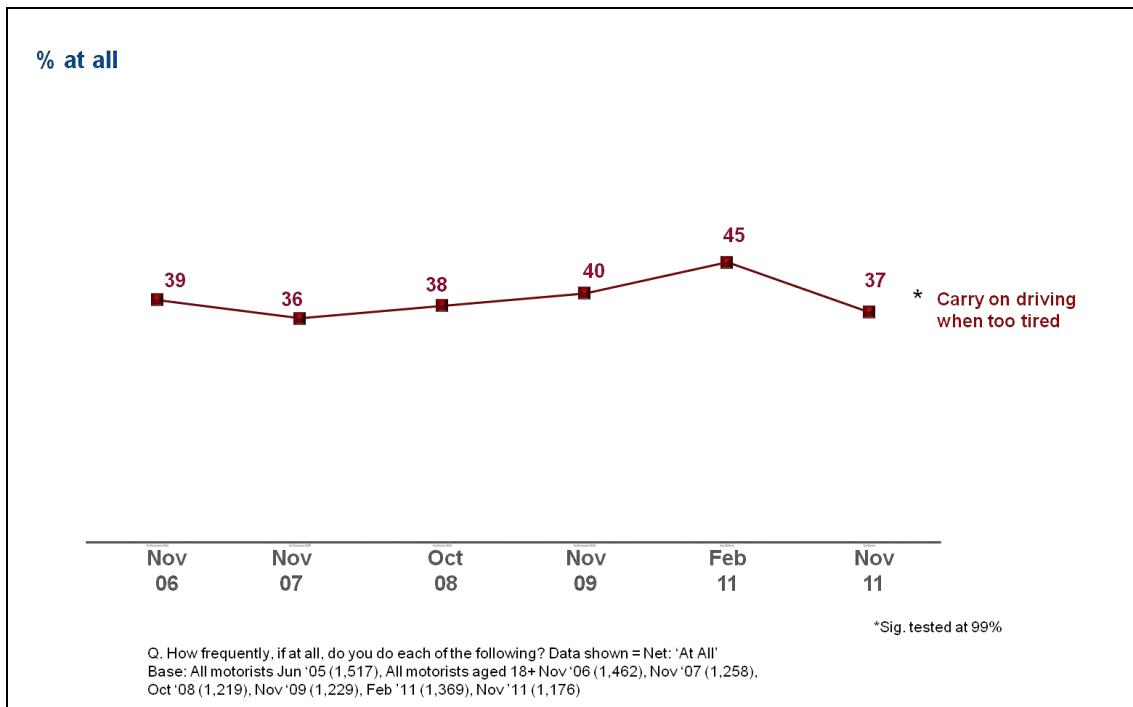
Two thirds of respondents agree completely that it is dangerous to carry on driving when too tired, a level which has not varied greatly since tracking began. Amongst motorists and non motorists, the picture is the same and indeed, 66% of each group completely agree with this statement. However there is still room for improvement and a third are not in complete agreement that driving when too tired is dangerous, perhaps being seen as a necessary evil which cannot be avoided.

The only key demographic difference on this measure is that females are more likely to regard it as dangerous compared to males (70% compared with 61%).

Chart 5ae – Perceived prevalence of dangerous driving behaviour: driver fatigue



Just over two fifths (43%) claim to know someone who carries on driving when too tired. As with many other behaviours, young people are more likely to know someone who carries on driving when too tired. This ranges from 56% amongst 18-29 year olds to 29% amongst 55+ year olds. Those of social class ABC1 were also significantly more likely to know someone (48%) than those of social class C2DE (35%). As also might be expected, those who use a vehicle to commute/for work were more likely to know someone who drives when too tired than leisure drivers (51% vs 43%).

Chart 5af – Prevalence of dangerous driving behaviour: driver fatigue

Following the increase between November 2009 and February 2011 (40% and 45% respectively), the level of those claiming to carry on driving when too tired fell back to 2008 levels at this latest wave, to 37%.

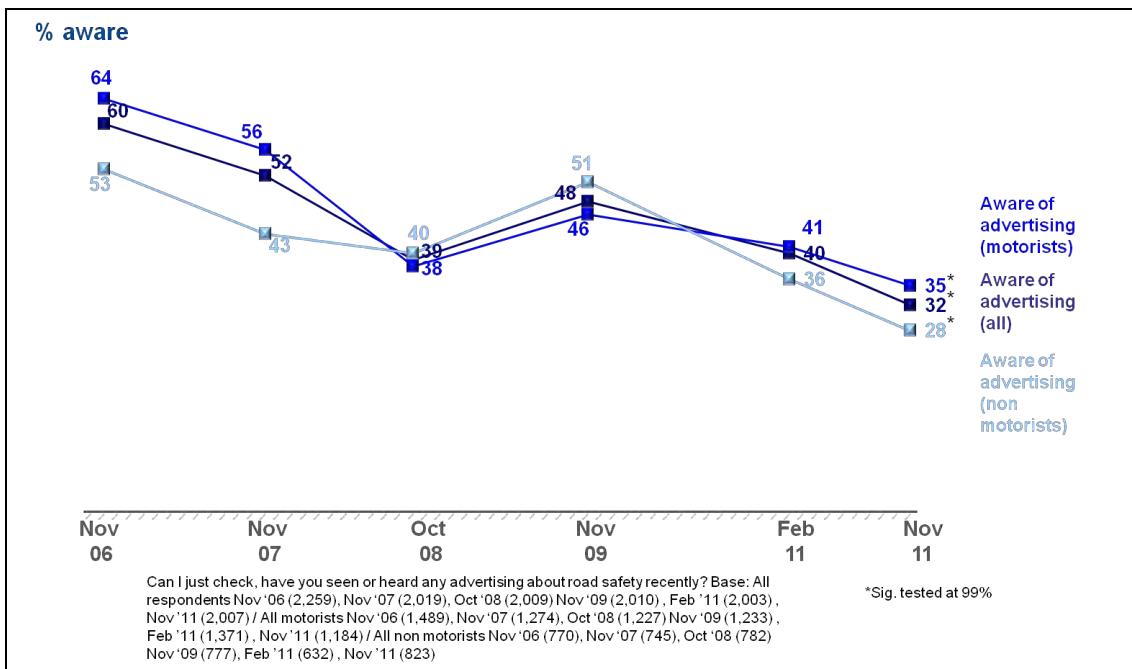
6. Awareness of, and attitudes towards, the THINK! brand

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

6.1 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 6a). They were then asked who they thought produced the road safety advertising that they recalled seeing (Charts 6b and 6c).

Chart 6a – Spontaneous awareness of road safety advertising



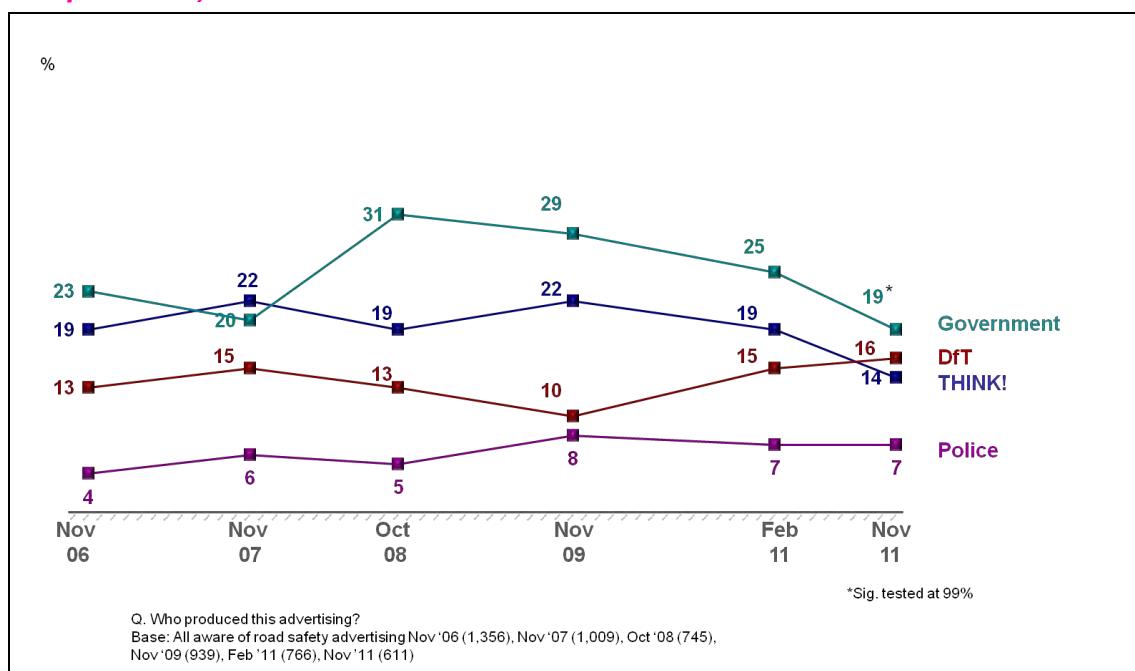
Recall of road safety advertising declined sharply from its peak in 2006 (60% of all respondents) to the point in 2008 at which only four in ten (39% of all respondents) could recall such advertising. The figures for 2009 showed a significant increase in recall, returning almost to 2007 levels (48%), although this fell again in February 2011 to four in ten (40%). In November 2011 this level fell further to 32% of all respondents, despite there having been more campaign activity than in the year leading up to the Feb 2011 survey. This may be an indication that the memory of some of the bigger campaigns was slow to fade, but is now beginning to diminish as time passes from the period of heavy THINK! activity up until 2009.

In November 2011, recall by motorists was higher than recall by non motorists, a pattern previously observed in 2006 and 2007 and in February 2011. In 2009, this pattern was reversed, with non motorists exhibiting slightly higher levels of recall than motorists.

Respondents aged 55 and over were least likely to have seen any advertising (23% compared with 37% of 16-54 year olds).

Respondents were then asked who they thought was responsible for the advertising that they recalled, the findings of which are shown below in Chart 6b.

Chart 6b – Spontaneous awareness of source of road safety advertising (all respondents)

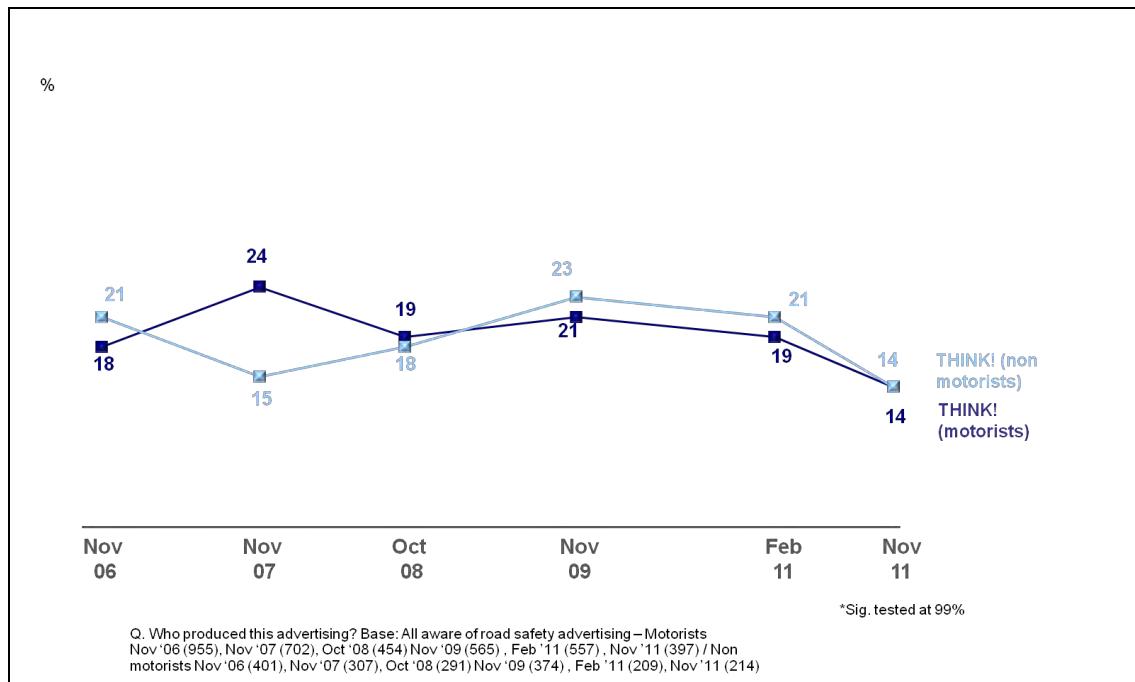


Between 2006 and February 2011 the two leading responses for perceived responsibility for advertising were the Government and THINK!. In the 2006 and 2007 surveys the proportion of respondents making these two suggestions was roughly similar, around the 20% mark, but in 2008 the proportion specifying the Government increased dramatically. The findings for February 2011 showed that, as in previous waves, Government was the leading perceived source of the advertising, accounting for around a quarter of suggestions (25%). This proportion fell significantly in November 2011 to 19%, although this is still the leading perceived source. Those who cite that the advertising was produced by THINK! now stand at 14%, although this is not a significant drop from February 2011. For the first time, respondents were more likely to say that the advertising was produced by DfT (16%) than by THINK! (14%).

Younger people were more likely to identify THINK! as the source of advertising, with 22% of 16 to 29 year olds saying that THINK! had produced the advertising, falling to eight per cent of those aged 45 and over. People aged 45 and over were more likely to say that the Department of Transport was responsible for the advertising (20%).

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 of four to six per cent before 2009 when it increased to a peak of 8%.

Chart 6c – Spontaneous awareness of source of road safety advertising (motorists vs. non motorists)

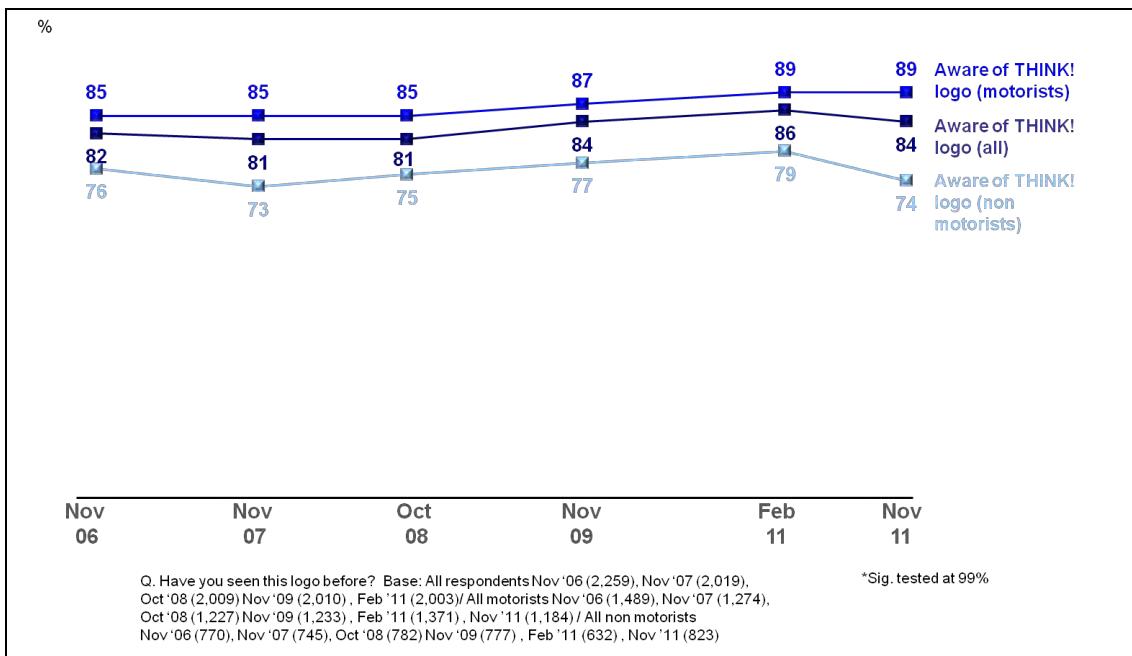


Attribution of the campaign to THINK! has been fairly consistent between motorists and non motorists, notwithstanding a divergence in 2007, when the figure for motorists peaked at 24%, whilst the same figure amongst non motorists fell to a low point of 15%. The fall in November 2011 can be equally attributed to motorists and non motorists, both at 14%.

Motorists with less driving experience were more likely to say that THINK! was the producer of advertising, with 34% of those with three years experience or less referencing THINK! compared with just 10% of those aged 55 and over.

6.2 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 6d).

Chart 6d – Prompted awareness of THINK! logo

When prompted, recognition of the THINK! logo remained high at nine in ten (89%), 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 74% in November 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 (92% of those who travelled 10,000+ miles in a year, falling to 85% of those who had driven for up to 3,000 miles).

As in previous waves, among respondents overall the level of recognition declines among those aged 55 and older, with 88% of 16-54s recognising the logo, compared with 75% of those aged 55 and over.

6.3 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 words (both favourable and unfavourable) and were asked to select which they felt best described the THINK! campaign. Positive descriptions are shown on Chart 6e and negative descriptions on Chart 6f. As in previous years, the overall response to the campaign was very positive.

Chart 6e – Positive words used to describe the THINK! campaign (prompted)

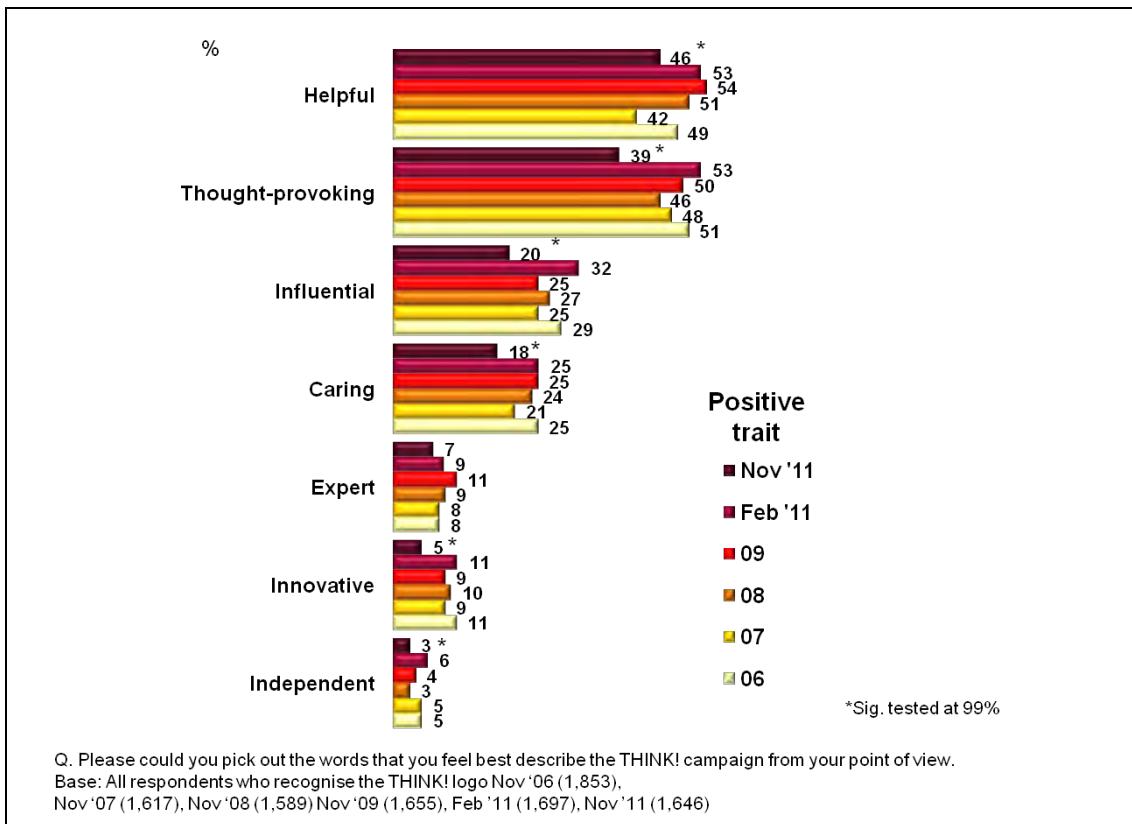
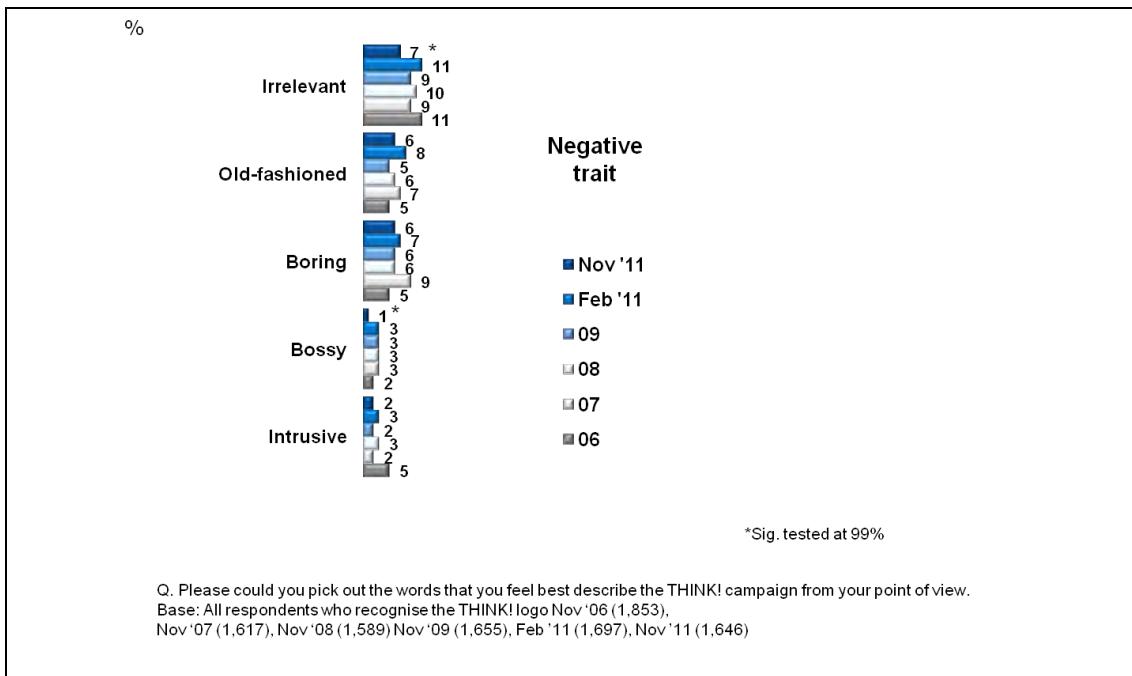


Chart 6f – Negative words used to describe the THINK! campaign (prompted)



The descriptions chosen by respondents recognising the THINK! logo have been quite consistent over the years in their relative proportions. "Helpful" and "thought-provoking" have been the two leading choices. Previously each had been chosen by

around half of respondents in every survey, but this fell significantly for both „helpful” (46%) and thought-provoking (39%) in November 2011.

There were also significant decreases in those who thought that THINK! was “influential”, “caring”, “innovative” and “independent”. These shifts were not mirrored by any increase in the negative words, and in fact there was also a decrease in some of the negative words chosen. This suggests that any change in perception of the THINK! brand is not from a positive to a negative association, but a general decrease in any strong association with the brand.

As in previous years, each negative trait was mentioned by a low proportion of respondents, with “irrelevant” mentioned by seven per cent, and “old-fashioned” and “boring” by six per cent. “Intrusive” was mentioned by two per cent, and “bossy” by just one per cent.

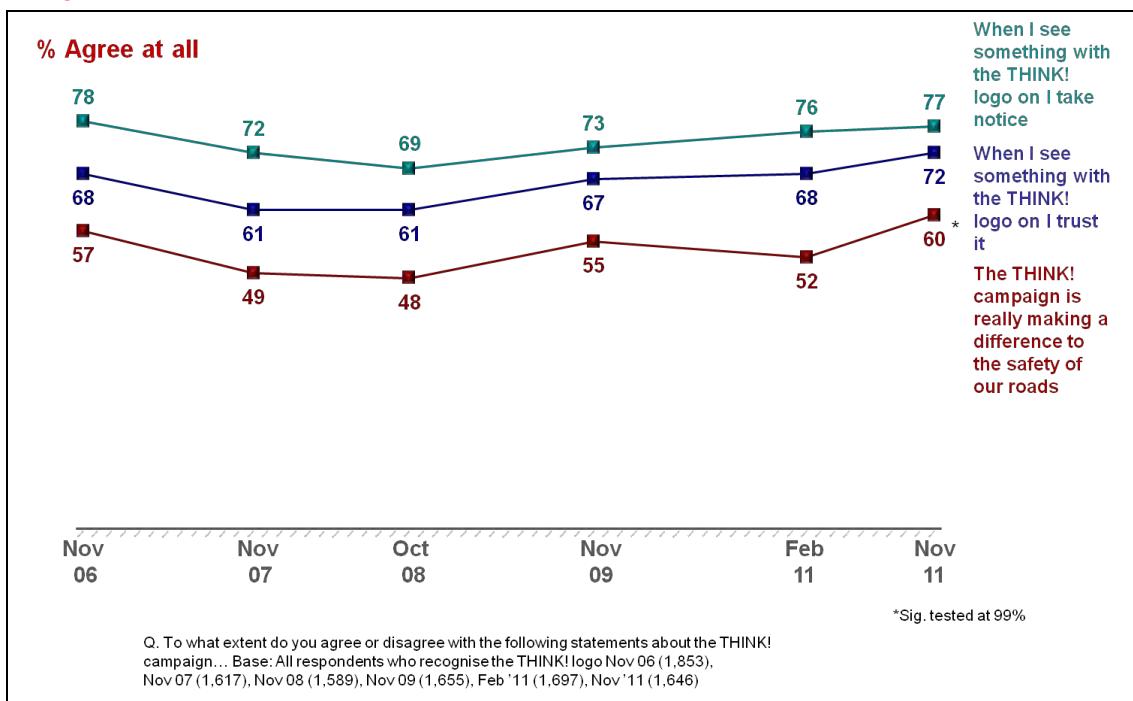
Women were more likely to describe THINK! as thought provoking (43% compared with 36% of men). Young people aged between 16 and 29 were more likely than older respondents (aged 55+) to say “influential” (26% compared with 15%), “caring” (24% compared with 16%) and “expert” (11% compared with 3%).

Unsurprisingly, motorists were more likely than non motorists to describe the THINK! brand as thought provoking (43% compared with 31%). This pattern is consistent over the last five surveys. Conversely, non motorists had tended to be more likely than motorists to choose “helpful” and “caring”. However there was no longer a significant difference in November 2011.

6.4 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 6g and 6h). These statements were designed to measure brand affinity, persuasion and momentum.

Chart 6g— Agreement with statements about the THINK! brand (all respondents)



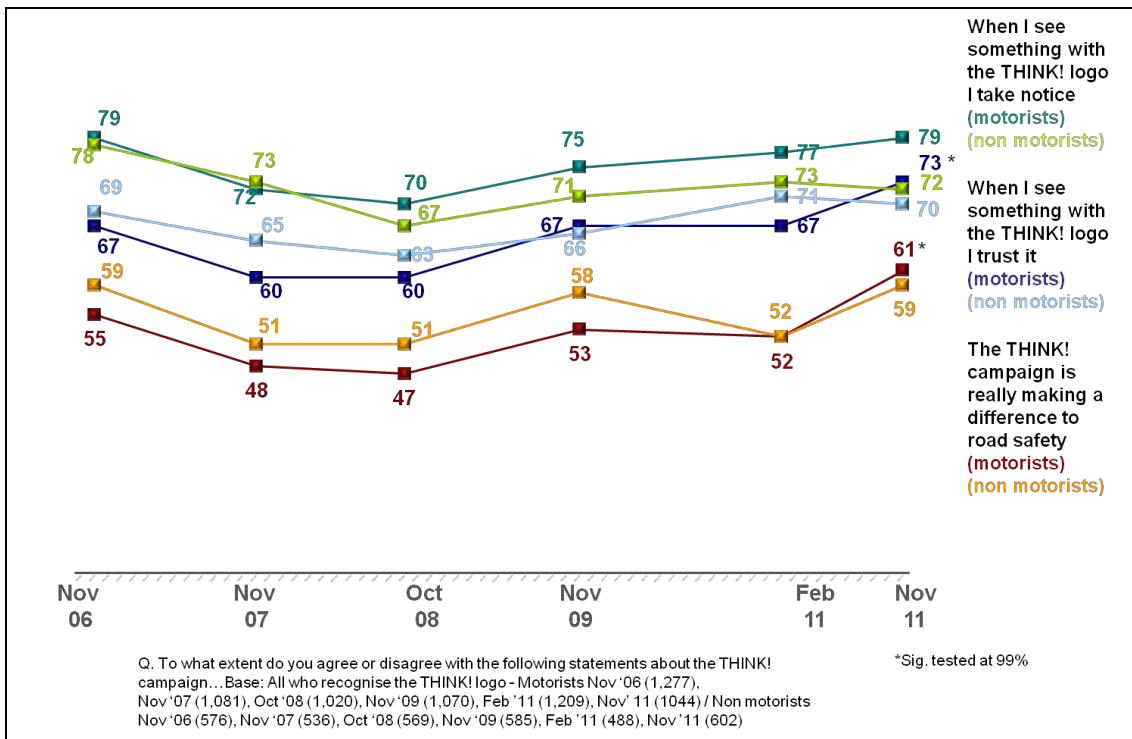
The trend across all three statements is remarkably consistent, with the highest levels of agreement recorded in 2006, dipping in 2007 and 2008 before recovering in 2009. Levels in 2011 remain broadly consistent with those found in 2009, although the statement "The THINK! campaign is really making a difference to the safety of our roads" saw a significant increase in November 2011 to 60%. The statement "when I see something with the THINK! logo on I trust it" remains consistent at 72%, although this is higher than the previous peak of 68%. Just over three quarters agreed with the statement "When I see something with the THINK! logo on I take notice" (77%), level with Feb 2011, and broadly level with the previous peak seen 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. For example on the "trust" statement, 79% of 16-29 year olds agreed, compared with 67% of people aged 55+.

Those from lower social grades were more likely to strongly agree that they take notice (44% of C2DEs compared with 34% of ABC1s). There were also particularly high levels of agreement from black and minority ethnic respondents, with 48% strongly agreeing with the "trust" statement, compared with 37% of white respondents.

Chart 6h (below) examines these trends by comparing responses from motorists with those from non motorists.

Chart 6h – 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 February and November 2011 the views of motorists and non-motorists were more closely aligned.

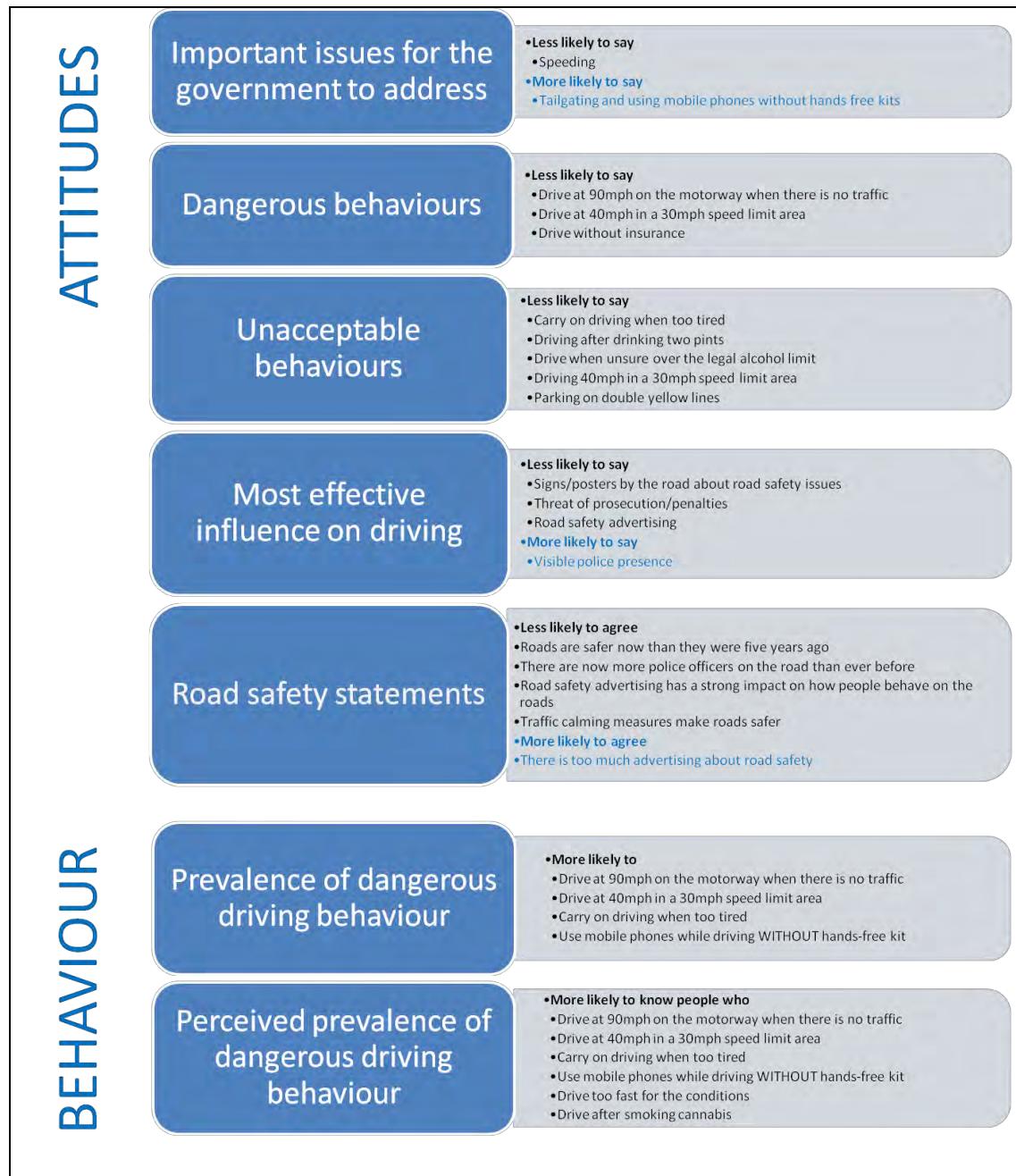
Encouragingly, the "trust" statement saw an increase in agreement among motorists in November 2011 (to 73%), although this increase was not reflected in non motorists responses.

In terms of taking notice of THINK!, motorists and non motorists had previously shown similar levels of agreement, although since 2008 a gap has widened, with motorists more likely to agree than non motorists.

While not different from the general population demographically, those who were aware of THINK! but who do not take notice of it differ from respondents generally in

terms of their behaviour and attitudes. The differences among this group are shown in Chart 6i. Due to the small size of this group, these differences are not statistically significant so should be treated as indicative.

Chart 6i – Attitudes and behaviours of those who do not take notice of THINK!

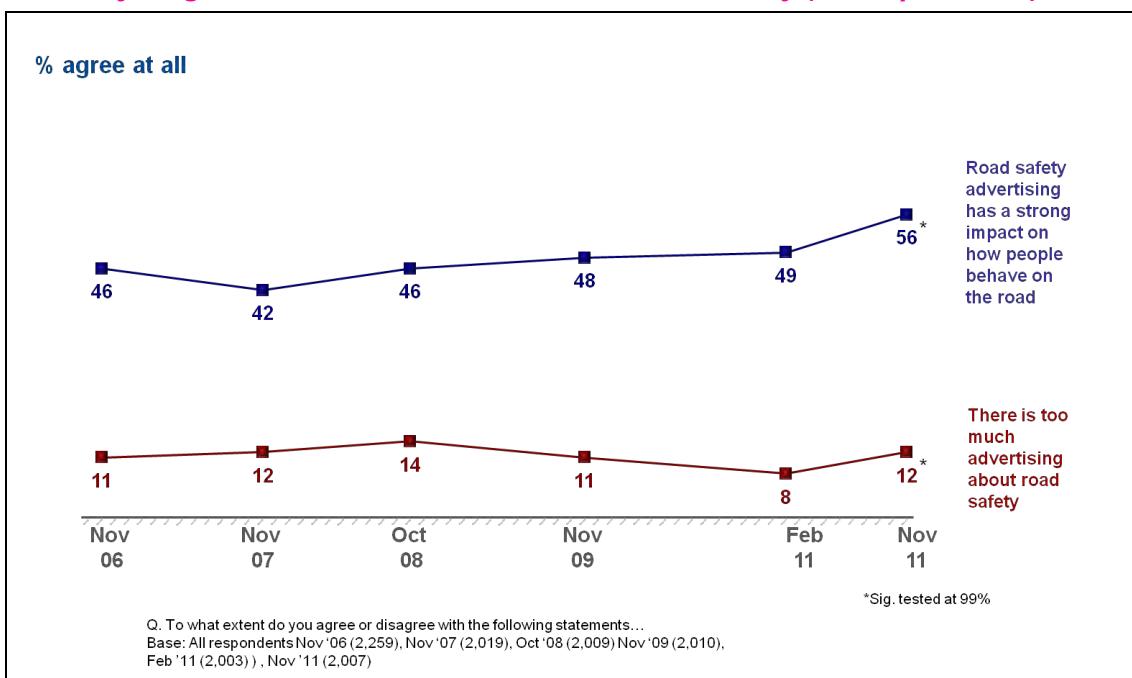


People who did not take notice of THINK! differed particularly in their attitudes and behaviours around speeding. They were also less likely to acknowledge the impact of road safety advertising than respondents generally. This group were more likely than others to say that a visible police presence has an impact on them, although they were less likely to think that there is greater police presence now than there was five years ago.

In terms of behaviour, people who do not take notice of THINK! were more likely to speed, drive when tired and use mobile phones without a hands free kit while driving. In addition to this, when asked about the behaviours of people they know, they were more likely to claim to know people who drive too fast for the conditions or drive after smoking cannabis.

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 Charts 6j and 6k.

Chart 6j – Agreement with statements about road safety (all respondents)



Over half of respondents (56%) agreed that road safety advertising has a strong impact on how people behave on the road. This figure a significant increase on February 2011, and the highest ever seen for this measure. Around three in ten respondents disagreed that road safety advertising has a strong impact on how people behave on the road (27%).

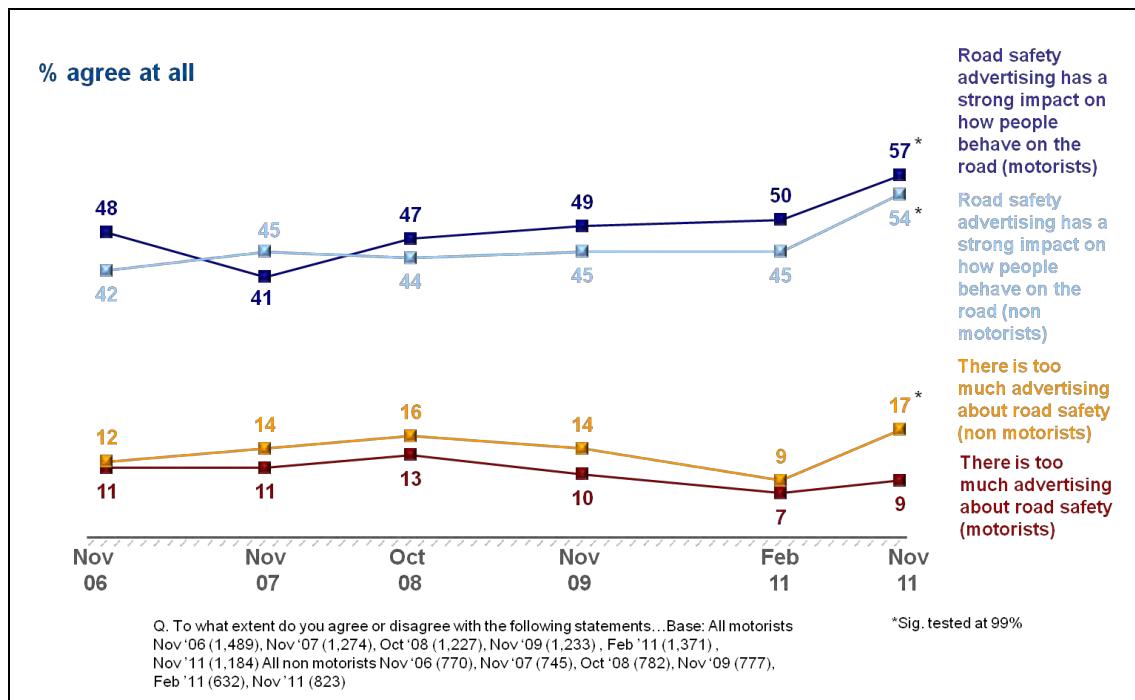
Notably there were particularly high levels of agreement from younger respondents, with 60% of respondents aged 16 to 54 agreeing, compared with 49% of those aged 55 and over.

One in ten respondents (12%) thought that there was too much advertising about road safety. This is a small but significant increase from eight per cent in Feb 2011, when there had been very little THINK! road safety activity, but is consistent with

levels seen between 2006 and 2009. Contrary to patterns found in previous years, those aged 55 and over were more likely than their younger counterparts to strongly disagree with this statement, indicating that older people are no longer more likely to have a negative attitude towards road safety advertising.

Chart 6j (below) examines the responses to these questions from motorists and non motorists.

Chart 6k – Agreement with statements about road safety (motorists vs. non motorists)



Motorists (57% agreed in November 2011) have tended to be slightly more positive about the value of road safety advertising than non motorists (54% agreed it had a strong impact in November 2011), though the reverse was true just once, in the 2007 survey. The increase seen in agreement overall in November 2011 was the case for both motorists and non motorists.

Non motorists were previously slightly more likely to believe that there is too much advertising about road safety than were motorists. This difference became more pronounced in November 2011, with the increase in agreement overall being driven by an increase in agreement by non motorists (to 17% from 9% in February 2011).

7. Young motorists

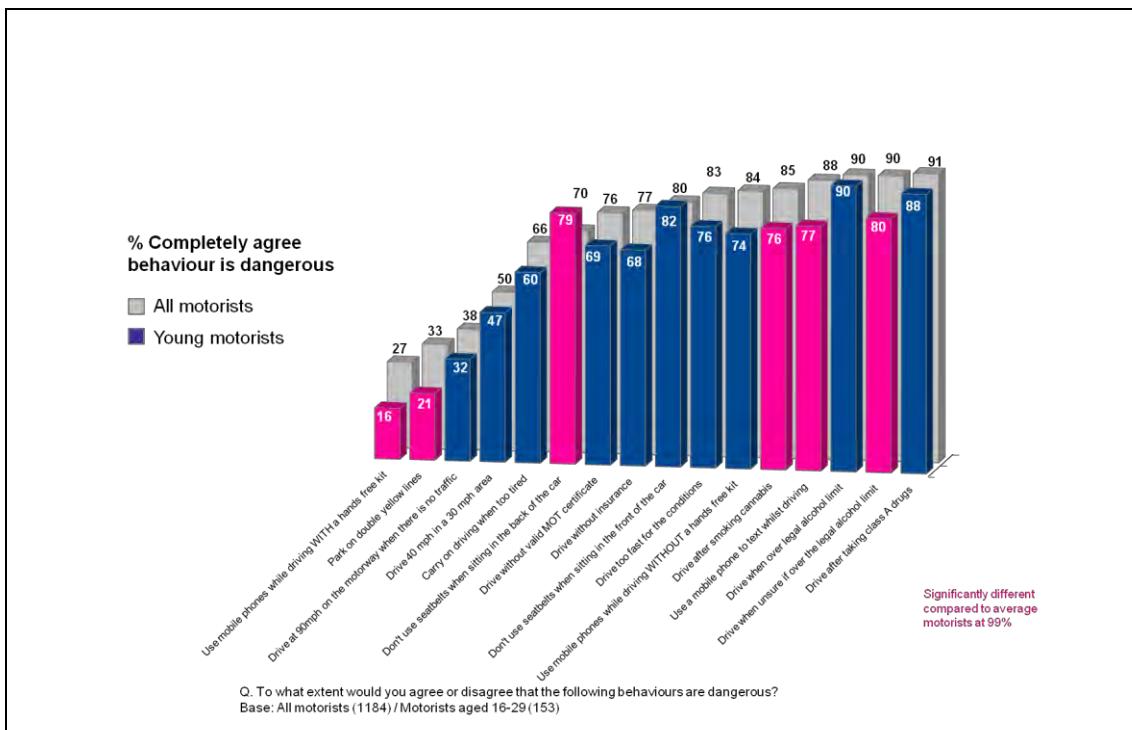
This section focuses on the attitudes and behaviours of young motorists (those aged 16-29), a key group of interest, compared with those of all motorists.

7.1 Dangerous driving behaviours

This section summarises the overall hierarchy of agreement that certain driving behaviours are dangerous, their relative acceptability to each other, frequency of undertaking them and prevalence. The results for young motorists are shown by the bars in front, whilst the results for all motorists are shown by the grey bars behind. A pink bar indicates where young motorists are significantly different to all motorists.

Chart 7a looks at the proportion who completely agree each of the behaviours is dangerous.

Chart 7a – Agreement that each behaviour is dangerous - Young motorists

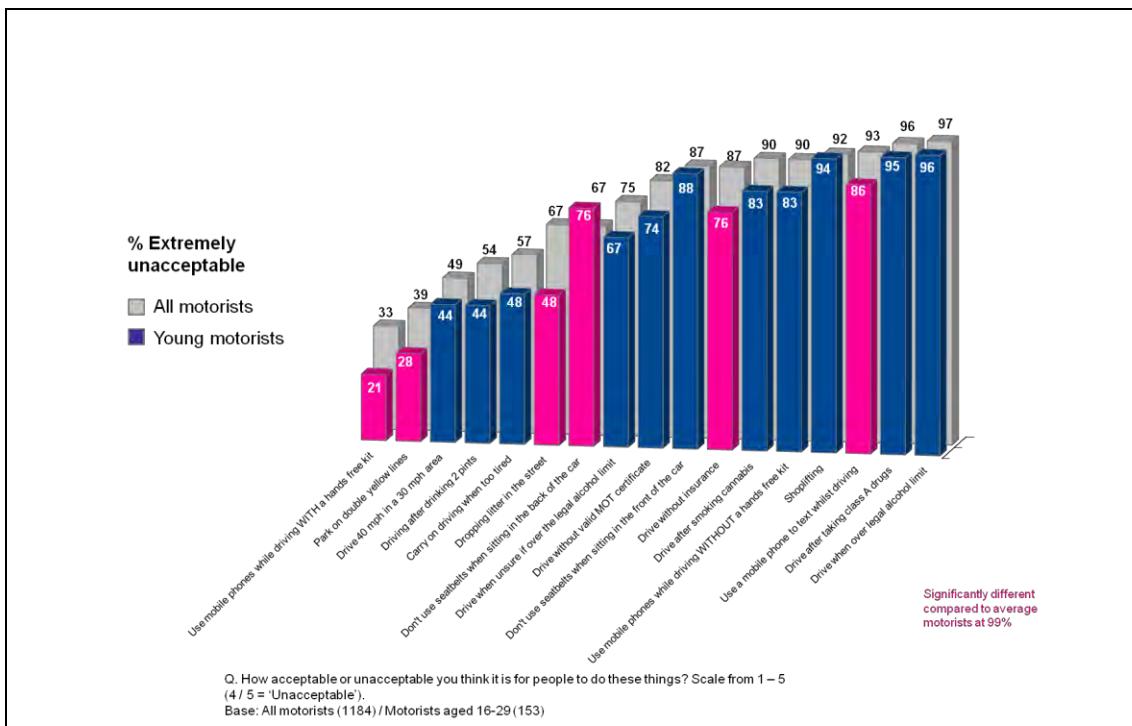


Young motorists are not dramatically different from the average motorist, but they are less likely to appreciate the dangers of risky driving behaviours, in particular for driving when unsure if over the legal alcohol limit or after smoking cannabis, using a mobile phone to text or while driving, or with a hands free kit, and parking on double yellow lines. However, they were more likely to be aware of the dangers of not wearing a seatbelt in the back, perhaps reflecting their greater likelihood to be a rear

passenger, or that they have grown up with seatbelt wearing being a legal requirement, unlike older motorists.

Chart 7b considers the relative (un)acceptability of a range of dangerous driving behaviours.

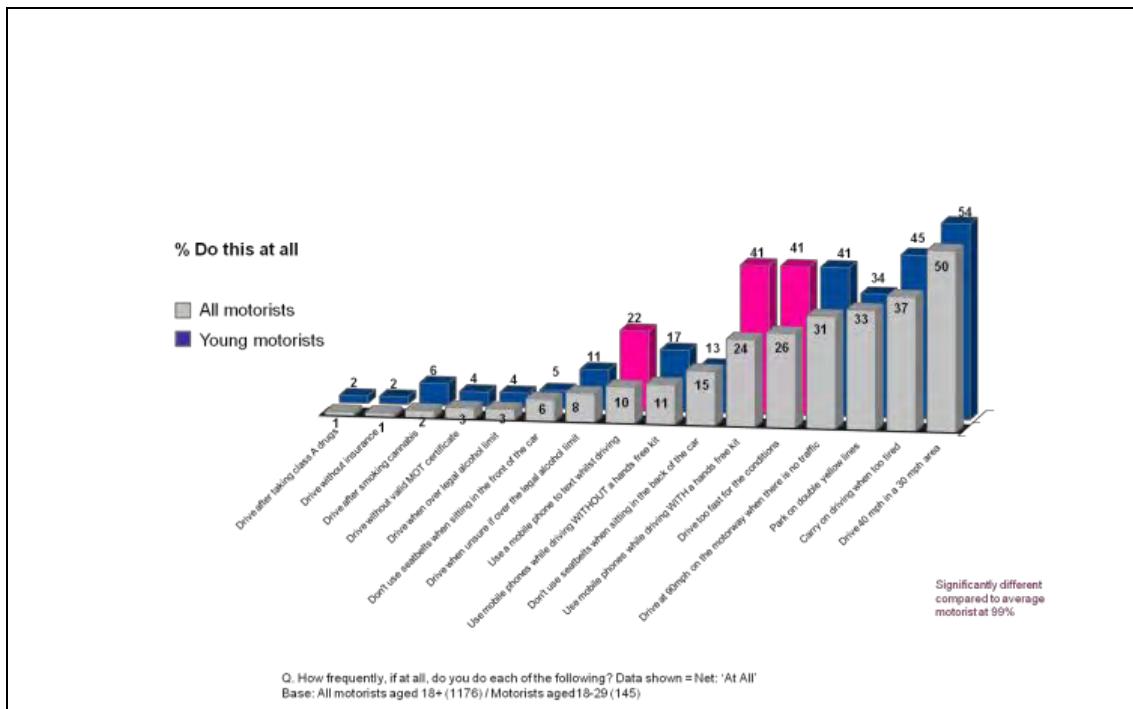
Chart 7b – Acceptability of people conducting behaviours - Young motorists



A similar pattern is seen with young motorists in terms of acceptability of dangerous driving behaviours as was seen with agreement that a particular behaviour is dangerous. Whilst young motorists do not hold radically different views, they are less likely to classify behaviours as extremely unacceptable, and this is significantly so for using a mobile phone to text whilst driving, or with a hands free kit, driving without insurance, and parking on double yellow lines. Again, the only behaviour they were more likely to cite as extremely unacceptable was not wearing a rear seatbelt.

Chart 7c shows the proportion who claim to undertake each of the driving behaviours.

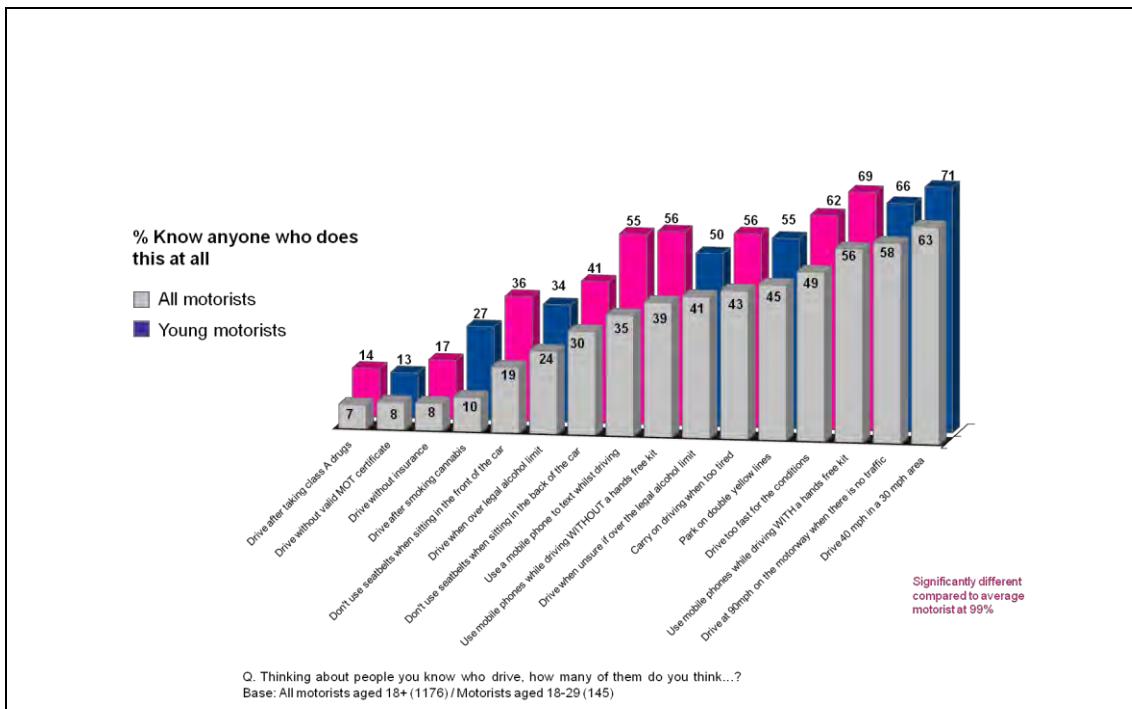
Chart 7c – Frequency of doing each activity - Young motorists



Young motorists were largely similar to motorists as a whole in terms of their own behaviour, but they were more likely to text while driving, drive too fast for the conditions and use a mobile phone with a hands free kit. This may reflect the essential role mobile phones play in the life of this age group.

Chart 7d displays the perceived prevalence of each driving activity amongst the respondent's social circle.

Chart 7d – Prevalence of doing each activity - Young motorists

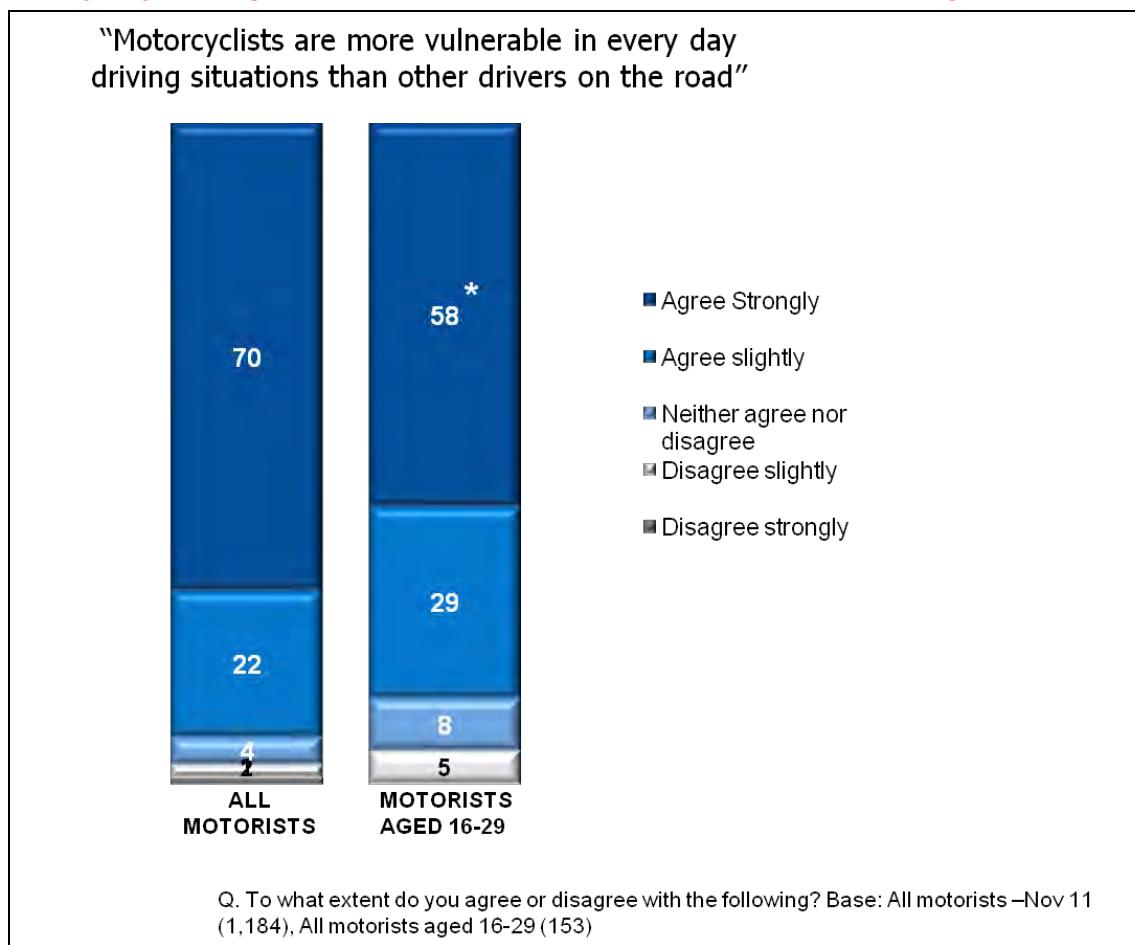


Young motorists were more likely to see a range of dangerous behaviours in their peer group, including using a mobile phone with or without a hands free kit, or texting whilst driving, driving too fast for the conditions or when too tired. Interestingly, despite being more likely than all motorists to say not wearing a rear seat belt is dangerous, and extremely unacceptable, they are more likely to know someone who engages in this behaviour. However, this could be reflective of the fact this age group has a greater tendency to be a rear passenger.

7.2 Attitudes towards motorcyclists

This section looks at the attitudes of young motorists towards motorcyclists, as shown in chart 7e.

Chart 7e – Agreement with statement ‘Motorcyclists are more vulnerable in every day driving situations than other drivers on the road’ - Young motorists



Young motorists are less aware of the needs and vulnerabilities of motorcyclists, with only six in ten (58%) agreeing strongly that motorcyclists are more vulnerable than other drivers (compared with 70% of all motorists). They are also less likely to say they take the precautions of looking out for cyclists/motorcyclists when turning, or when opening car doors. This may reflect the lack of experience of young motorists, as well as less cautious driving behaviour.

7.3 Awareness of, and attitudes towards, the THINK! brand

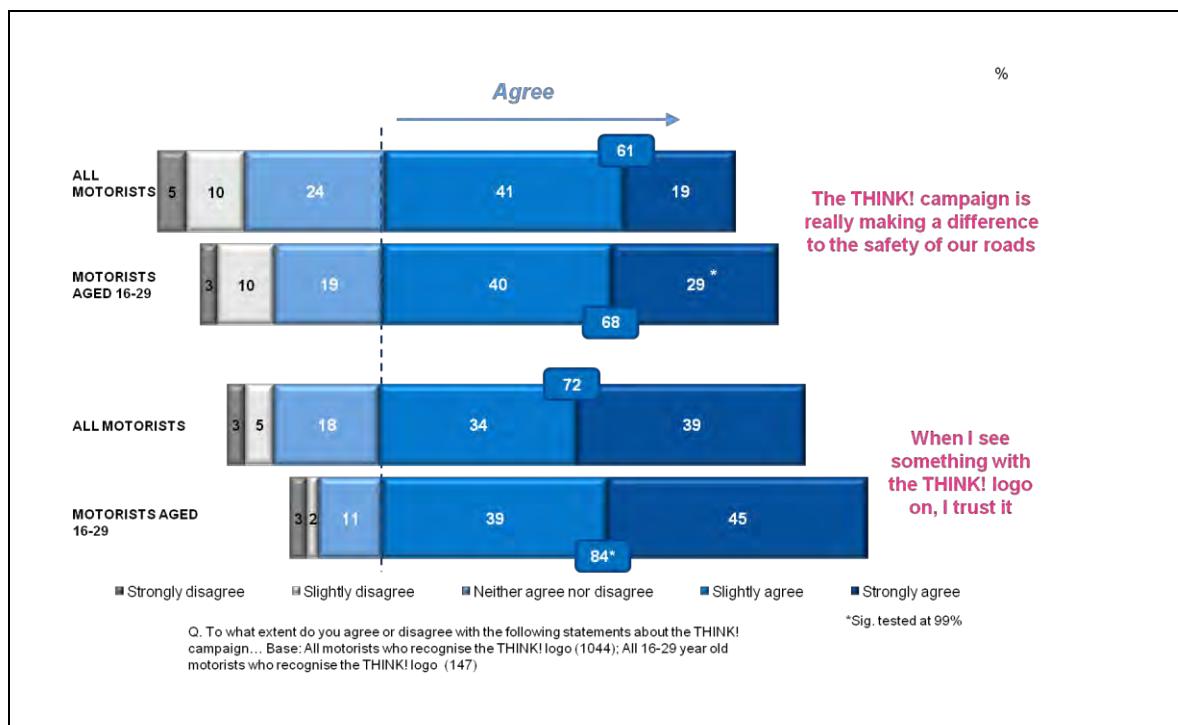
This section covers the young motorists' awareness of and attitudes towards the THINK! brand.

There was almost universal prompted awareness of the THINK! logo amongst young motorists (95% compared with 89% of motorists). Young motorists are more likely to say that the THINK! campaign is influential (33% compared with 21% of motorists) and they are more likely to agree that road safety advertising has a strong impact on how people behave on the roads (67% compared with 57% of all motorists), which may reflect the fact that THINK! Is a brand they have grown up with in their driving career.

This suggests THINK! is well placed to influence young motorists as it is more recognised, more influential and perceived to have a stronger impact amongst this group compared with motorists in general.

Chart 7g shows the attitudes of young motorists towards two attitudinal statements designed to measure brand affinity, persuasion and momentum.

Chart 7g – Agreement with statements about the THINK! brand - Young motorists



Young motorists are more likely to strongly agree the THINK! campaign is really making a difference to the safety of our roads (29% compared with 19% for all motorists), and more likely to agree that when they see something with the THINK! logo on they trust it (84% agree slightly/strongly compared with 72% for all motorists). They were equally likely as motorists to take notice of the THINK! logo. Again, this is all encouraging as it places THINK! in a positive light for influencing this group in future.

Appendix A: Road user profile

This section 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.

A1 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 A1):

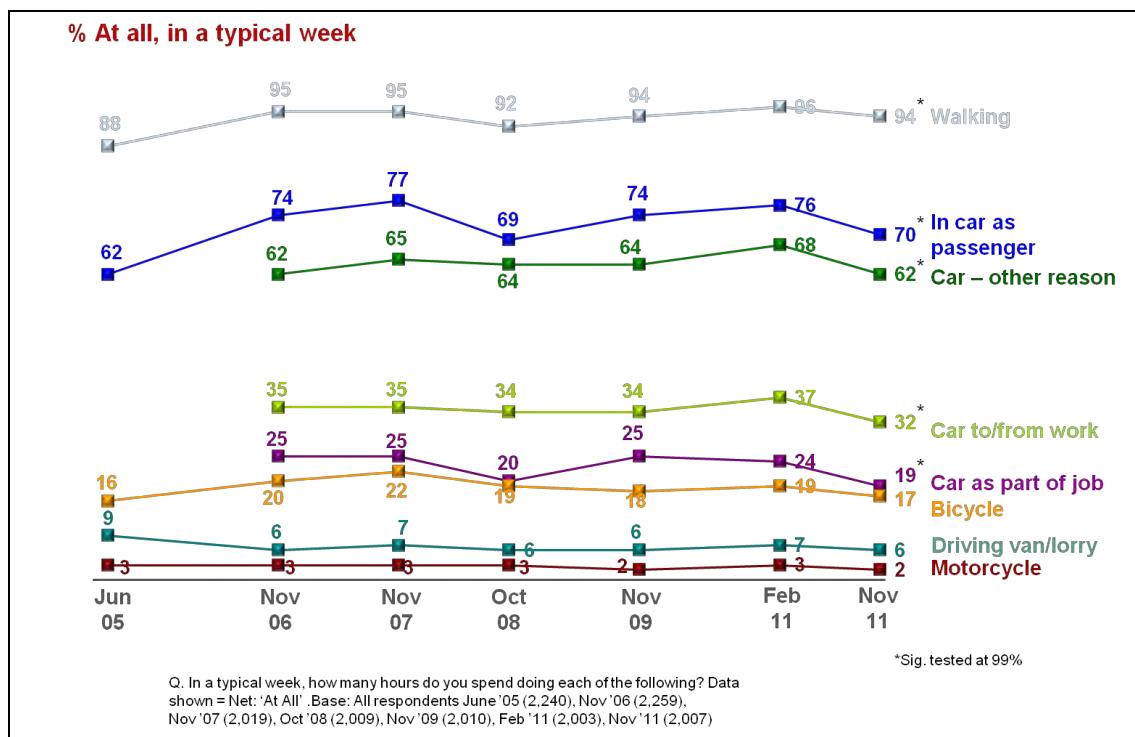
- Walking on the pavement or road
- Travelling in a car as a passenger
- Driving a car (either to and from work, as part of a job, or for other reasons)
- Riding a bicycle
- Driving a van or lorry
- Riding a motorcycle, scooter or moped

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 caution².

² See THINK! Annual Survey 2006 for an explanation of the difference.

Chart A1– 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 (94% in November 2011). Car usage was also high, although there have been significant decreases in November 2011. Seven in ten ride as passengers in a car (70%) and six in ten (62%) drive for non work-related reasons. Lower proportions use a car to get to and from work (32%) or as part of their job (19%). The proportion of adults who used other means of transport was relatively low: one fifth (17%) rode bicycles, six per cent drove a van or lorry, and only two per cent rode motorcycles, scooters or mopeds.

All vehicular modes of transport were predominantly used by men, with twice as many men (23%) as women (11%) cycling, and men more likely than women to drive a car, van or lorry at all (70% compared with 57% of women) or ride a motorcycle, scooter or moped (4% compared with 1% of women). There were also differences in road usage by social grade and age (Table A2).

Table A2 – 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	22*	15	12	31†	10
Driving a car to and from work	37*	25	23	50†	13
Driving a car for other reasons	71*	51	36†	71	67
Driving a van/lorry	3*	9	3	10†	2
Riding a motorcycle/scooter/moped	2	3	2	3	2
Riding a bicycle	19*	14	18	22	10†
Travelling in a car as a passenger	73*	66	77†	66	71
Walking on the pavement/road	94	93	97	94	91

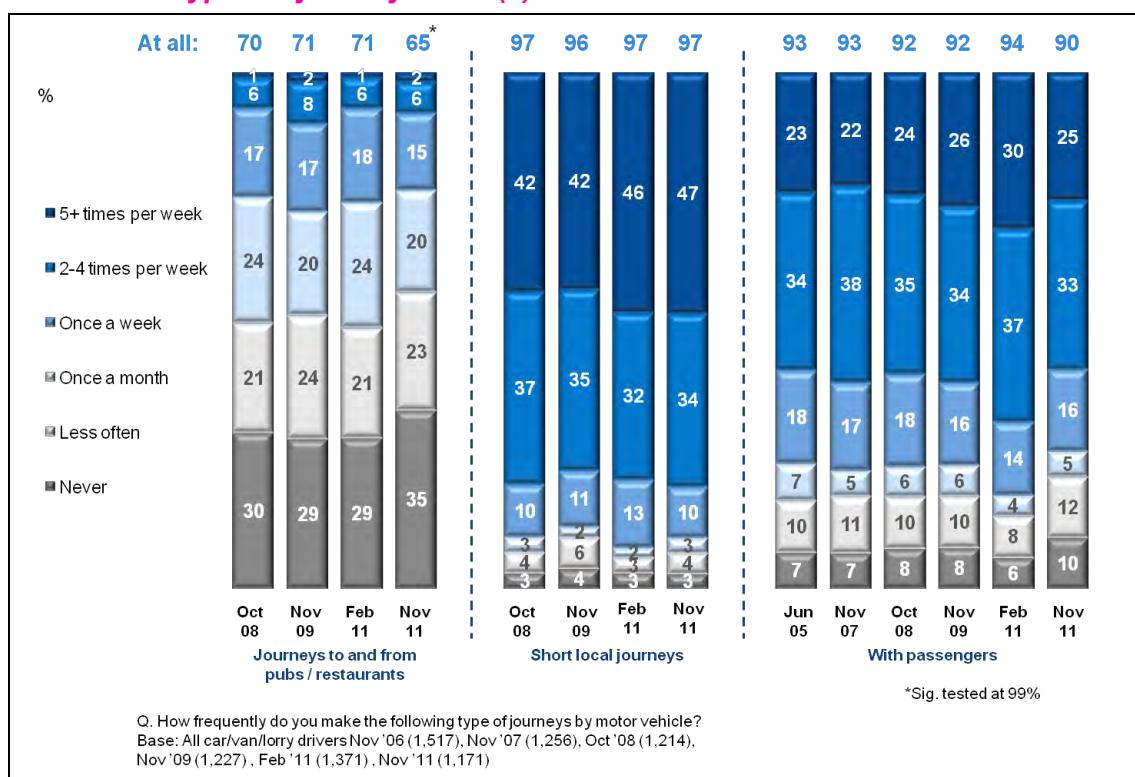
*Significantly different to C2DEs

†Significantly different to other age groups

A2 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 A3.

Chart A3– Types of journey made (1)

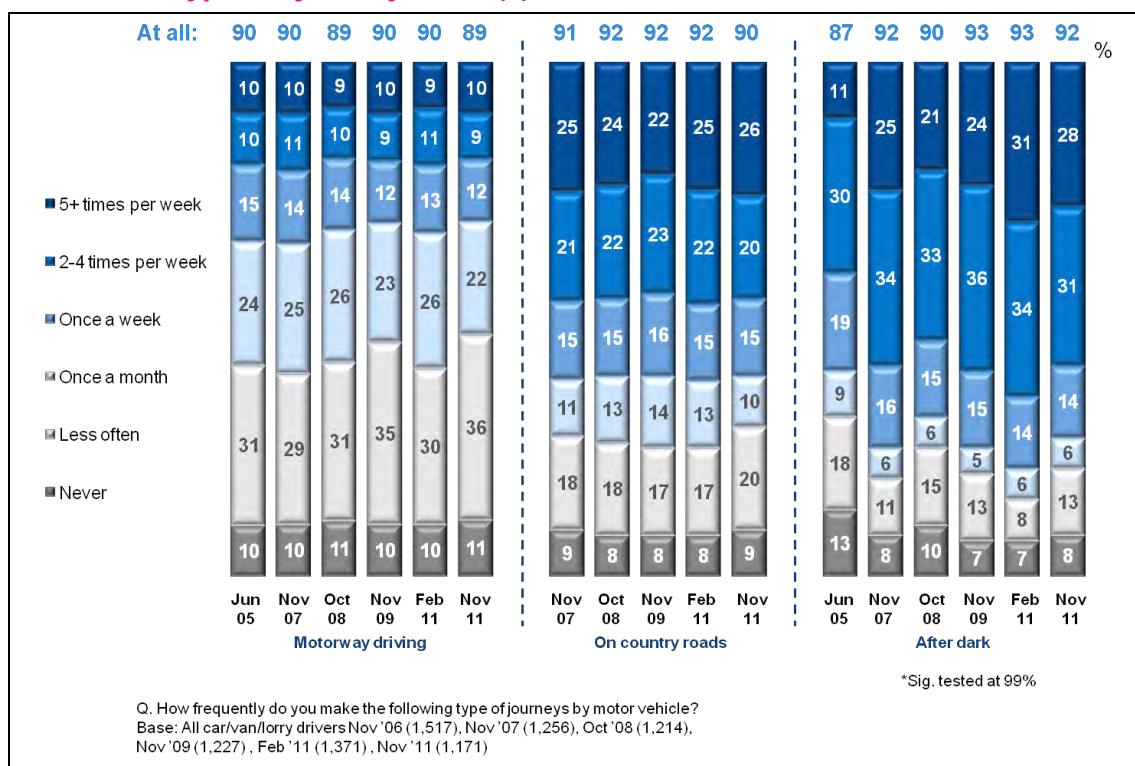
Sixty five per cent of drivers said they made journeys to pubs and restaurants in November 2011, a reduction from 71% in February 2011 and indeed, the lowest point since tracking began. Driving to a pub or restaurant was more common amongst ABC1s (70%) than C2DEs (56%).

As in previous years, short local journeys by motor vehicle were made by almost all drivers (97%), with around half (47%) making a trip of this kind five or more times per week. Such a high frequency was more common amongst those with children in the household (53%, compared with 44% of those with no children).

Journeys with passengers were made by nine in ten drivers (90%). Those with children in the household were more likely to do this five times per week or more (34% compared with 20% of those with no children in the household).

Chart A4 shows the frequency of three other types of journey, all of which were made by around nine in ten drivers.

Chart A4—Types of journey made (2)



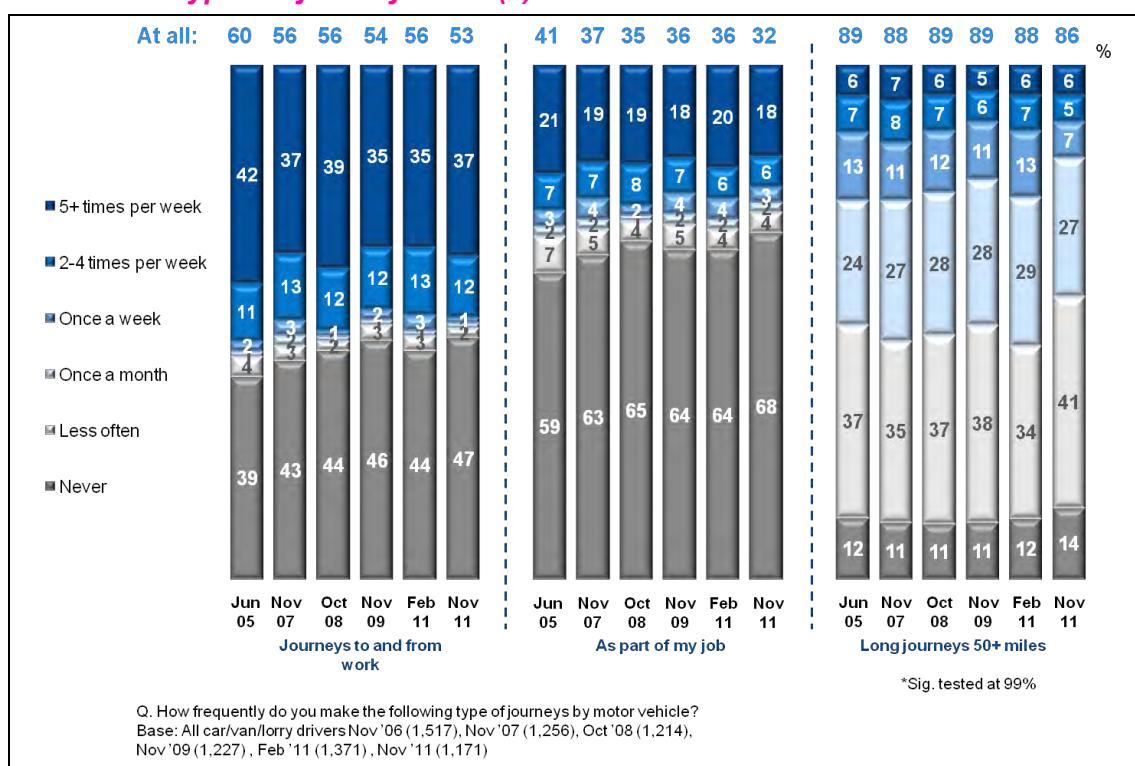
The vast majority of drivers drive on motorways (89%), though men (93%) and ABC1s (92%) are more likely than other drivers to do so. Around a third of drivers use motorways on a weekly basis or more (31%). Frequency of motorway driving has not changed significantly since its measurement on the survey began in 2005.

Nine in ten drivers (90%) reported driving on country roads, with six in ten (61%) 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 (75% do this at all).

As in previous years, just over nine in ten drivers (92%) 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. Those aged 30 to 54 (96%) and ABC1s (93%) were more likely to do this.

The frequency of work-related road journeys and long journeys (of 50 or more miles) is illustrated in Chart A5.

Chart A5– Types of journey made (3)



Journeys to and from work were undertaken by 53% of drivers in November 2011. This is consistent with levels recorded from 2007 onwards, when the survey was conducted in the winter rather than spring. Having said this, 53% is the lowest level recorded on this type of journey since tracking began. Half of all drivers (50%) drive to or from their work at least once a week, with over a third (37%) making this journey on five occasions or more per week. Men aged between 30 and 54 were the most likely to drive to and from work 5+ times a week or more (62%, compared with 37% overall), reflecting the higher employment rates within this demographic group.

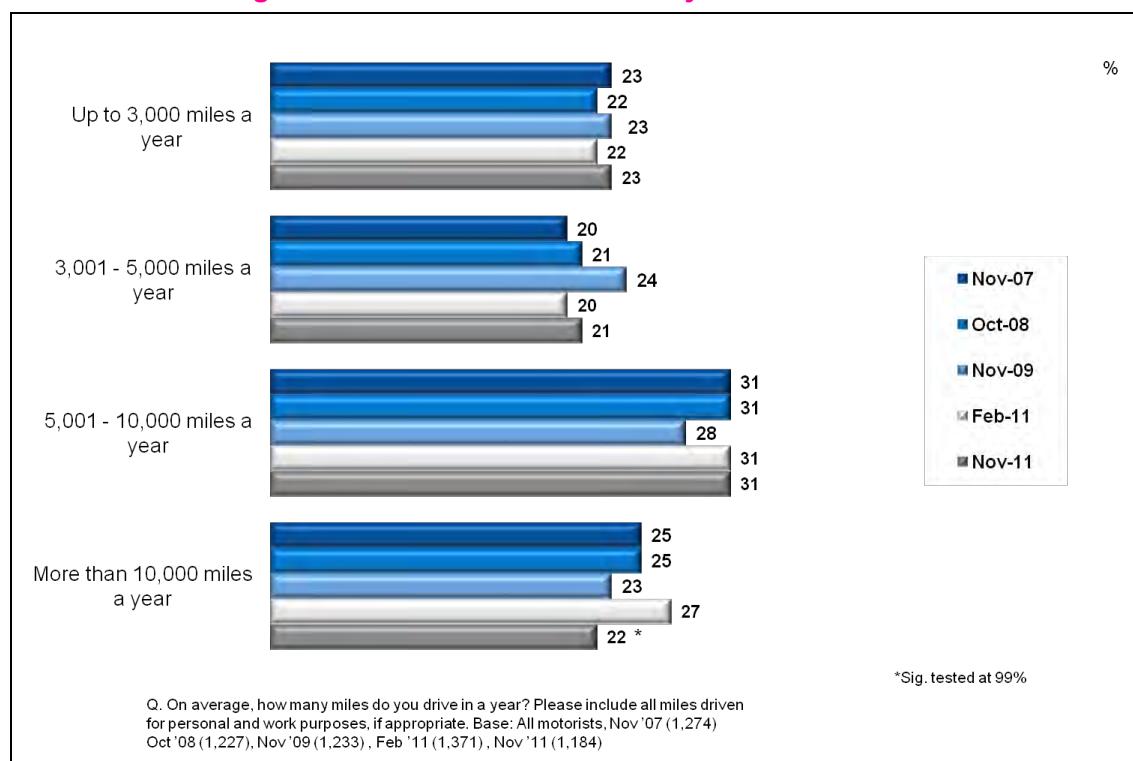
A third of drivers (32%) reported making journeys by motor vehicle as part of their job, again the lowest level since 2005. A fifth of all drivers did so at least five times a week (18%), a proportion that has remained largely consistent since 2005, and which is led by C2DEs (23% of whom drive for their work five or more times per week, compared with 15% of ABC1s).

Long journeys by motor vehicle (defined as 50 miles or more) were made by almost nine in ten drivers (86%), again, lower than previous years. Compared to the average driver, men aged 30-54 were more likely to make long journeys (95%), and ABC1s (89%) were more likely to do this than C2DEs (83%). Long journeys were undertaken five or more times per week by only six per cent of drivers, although this was higher among those who drive as part of their job (15%).

A3 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 November 2011 and previous years are shown in A6.

Chart A6– Average number of miles driven in a year



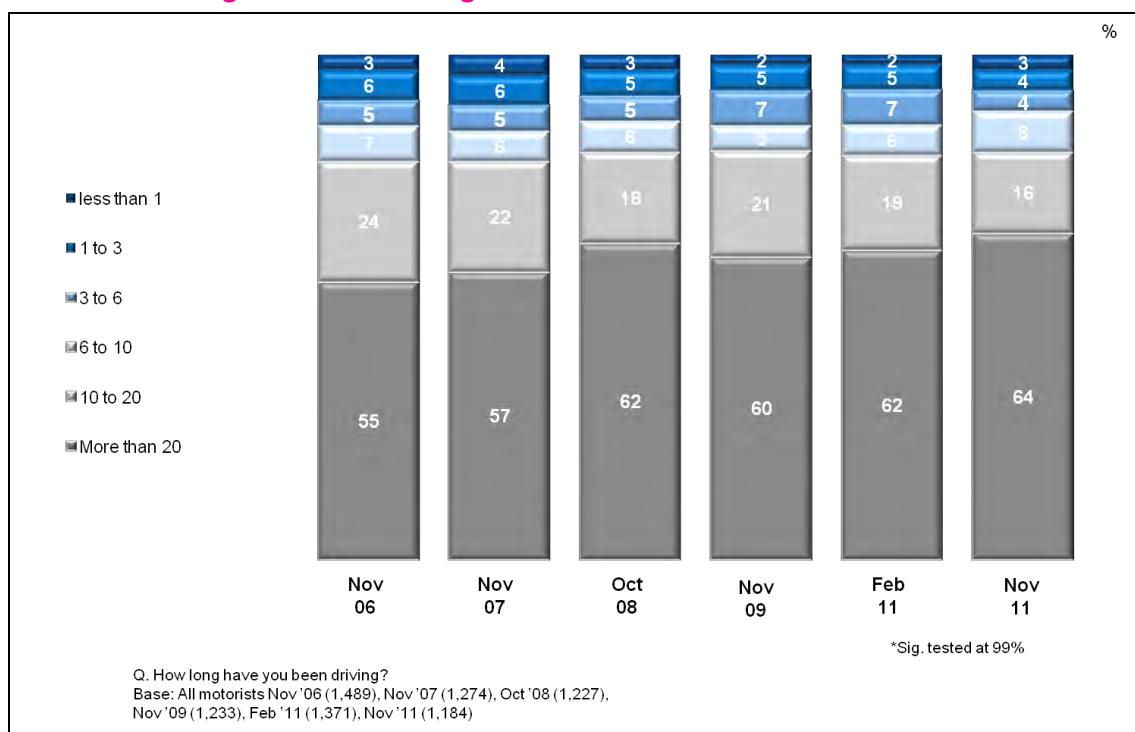
In 2011, over half of drivers of cars, vans, lorries or motorcycles reported driving over 5,000 miles a year (53%). In November 2011 there was a significant decrease in those saying that they drive over 10,000 miles a year (down to 22%). The remaining respondents were split equally between those who drove between 3,001 and 5,000

miles a year (21%, stable with previous years except 2009), and those who drove less than this (23%, stable since 2007).

Men aged 30-54 (39%) and those who drove for work (44%) 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 (39% under 3,000 miles per year, compared with 23% overall).

All drivers were asked how long they have been driving for, as a way of measuring their driving experience (Chart A7). This has remained relatively stable over the years it has been tracked and largely correlates with age of respondent.

Chart A7– Length of time driving



Two thirds of drivers (64%) have been driving for over 20 years. Those from higher social grades are more likely to fall into this highly experienced group (67% ABC1s compared with 60% C2DEs).

Appendix B: Sampling method

The TNS CAPI Omnibus employs a random location methodology, using sampling points which are sub samples of those determined in a sampling system developed by TNS for its internal use.

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. Sample points are defined using 2001 Census small area statistics and the Postal Address File (PAF). These are areas of similar population sizes formed by the combination of wards, with the constraint that each point must be contained within a single Government Office Region (GOR). In addition, geographic systems were employed to minimise the drive time required to cover each area as optimally as possible.

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, by sex (male, female housewife, female non-housewife); within female housewife, presence of children and working status, and within men, working status, to ensure a balanced sample of adults within effective contacted addresses. Interviewers are instructed to leave 3 doors between each successful interview.

Appendix C: Weighting procedures

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: BMRC Target Group Index, 2010 and NRS, 2010)

Appendix D: 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>	
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"> • Less than 1 hour • 1 - 2 hours • 3 - 5 hours • 6 - 9 hours • 10 - 14 hours • 15+ hours • None • Don't Know <p>This question is repeated for the following loop values:</p> <ul style="list-style-type: none"> - Driving a car as part of my job - Driving a car to and from work - Driving a car for other reasons - Driving a van/lorry - Riding a motorcycle/scooter/moped - Riding a bicycle - Travelling in a car as a passenger - Walking on the pavement/road 	Base: All Respondents
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>	Base: All Drivers (all who selected codes 1/2/3/4/5 at Q1)

	SHOW SCREEN	
	<p>• Up to 3000 miles a year • 3001 – 5000 miles a year • 5001-10,000 miles a year • More than 10,000 miles a year • Don't know</p>	
4	<p>How frequently do you make the following type of journeys by motor vehicle?</p> <ul style="list-style-type: none"> • 5+ times per week • 2-4 times per week • Once a week • Once a month • Less often • Never • Don't know <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>Base: All Drivers (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>

<p>7 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"> • Drink driving • Drug driving • Speeding • Use of mobile phones without hands free kit • Use of mobile phones with a hands free kit • Not wearing seatbelts • Not using child restraints • Child road awareness • Driving while tired • Motorcycle accidents • Tail gating • Road rage • Careless driving • Cycling safety • Other (specify) • None • Don't know 	Base: All Respondents
---	------------------------------

<p>8 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"> • Agree completely • Agree somewhat • Agree slightly • Disagree slightly • Disagree somewhat • Disagree completely • Don’t know <p>Drive when unsure if they are over the legal alcohol limit Drive at 90mph on the motorway when there is no traffic Use a mobile phone to text whilst driving Drive after taking Class A drugs Driving at 40mph in a 30mph speed limit area Drive without insurance Drive without a valid MOT certificate Carry on driving when too tired Parking on double yellow lines Drive too fast for conditions Use mobile phones while driving without a hands-free kit Use mobile phones while driving with a hands-free kit Don’t use seatbelts while sitting in the front of the car Drive when over the legal alcohol limit Don’t use seatbelts when sitting in the back of the car Drive after smoking Cannabis</p>	Base: All Respondents
--	--

<p>9 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"> • 01: FAIRLY ACCEPTABLE • 02 • 03 • 04 • 05: EXTREMELY UNACCEPTABLE • (DK) <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>Driving at 40mph in a 30mph speed limit area</p> <p>Driving without motor insurance</p> <p>Drive without a valid MOT certificate</p> <p>Dropping litter in the street</p> <p>Parking on double yellow lines</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>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>Drive when over the legal alcohol limit</p>	<p>Base: All respondents</p>
--	-------------------------------------

10	<p>Which of these are the most effective when it comes to influencing how safely you drive? Please pick your top three.</p> <p>SHOW SCREEN - CODE TOP THREE IN ORDER</p> <ul style="list-style-type: none"> • Newspaper articles about road safety/accidents • Signs/posters by the road about road safety issues • Driving instruction lessons • In-car safety systems e.g. seatbelt reminders, speed warnings • Speed cameras • Road safety advertising • Visible police presence • Speed humps • Threat of prosecution/penalties • Driving test • Family • Friends • Government • Don't know • None of the above 	Base: All Drivers (all who selected codes 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"> • Strongly agree • Slightly agree • Neither • Slightly disagree • Strongly disagree • Don't know <p>Roads are safer than they were five years ago There are now more police officers on the road than ever before There is too much advertising about road safety Road safety advertising has a strong impact on how people behave on the roads Traffic calming measures (e.g. speed bumps) make roads safer Motorcyclists are more vulnerable in every day driving situations than other drivers on the road I feel excluded on a night out when I am the designated driver When I am on a night out as a designated driver, venues encourage me to avoid alcoholic drinks I don't enjoy my night out as much when I am the designated driver</p>	Base: All Respondents
13	<p>How long have you been driving? (SINGLE CODE)</p> <ul style="list-style-type: none"> • Less than a year • Between 1 and 3 years • Between 3 and 6 years • Between 6 and 10 years • Between 10 and 20 years • More than 20 years • Don't know 	Base: All Drivers (all who selected codes 1/2/3/4/5 at Q1)

14	<p>When driving, what precautions do you take to avoid accidents with motorcyclists and cyclists on the road? (MULTICODE)</p> <p>SHOW SCREEN. RANDOMISE</p> <ul style="list-style-type: none"> • Checking mirrors regularly • Watching for cyclists/ motorcyclists when turning • Looking out for cyclists/ motorcyclists when coming out of a side road • Leaving enough space between your car and cyclists/ motorcyclists • Turning headlights down for oncoming cyclists/ motorcyclists • Looking out for cyclists/ motorcyclists when opening car doors • Expecting sudden movements in bad weather/ bad road surfaces • Paying extra attention in bad weather/ bad road surfaces • Other (specify) • Don't know 	<p>Base: 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>
ONS Q '05	<p>In terms of risk of accidents, which of the following do you think is the safest form of transport?</p> <p>(NOTE TO DP: please randomise answer list)</p> <ul style="list-style-type: none"> • Bus • Train (not including the underground/metro) • Underground/metro • Car • Motorcycle • Bicycle • Walking • Don't know 	<p>Base: All Respondents</p>
ONS Q2 '05	<p>And which do you think is the least safe, in terms of risk of accidents?</p> <p>(NOTE TO DP: please randomise answer list in same order as appears for previous question)</p> <ul style="list-style-type: none"> • Bus • Train (not including the underground/metro) • Underground/metro • Car • Motorcycle • Bicycle • Walking • Don't know 	<p>Base: All Respondents</p>

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

	Park on double yellow lines Drive too fast for the conditions Use mobile phones while driving without a hands-free kit Use mobile phones while driving with a hands-free kit Don't use seatbelts while sitting in the front of the car Drive when over the legal alcohol limit Don't use seatbelts when sitting in the back of the car Drive after smoking cannabis	
	SELF COMPLETION SECTION ENDS HERE	

19	<p>Can I just check, have you seen or heard any advertising about road safety recently? (SINGLE CODE)</p> <p>SHOW SCREEN</p> <ul style="list-style-type: none"> • Yes • No • Don't know 	Base: All Respondents
20	<p>Who produced this advertising? (MULTICODE)</p> <p>PROBE: Do you remember any logos or brands? DO NOT READ OUT. CODE ALL THAT APPLY. DO NOT SHOW SCREEN.</p> <ul style="list-style-type: none"> • THINK! • Department for Transport/ DfT • Government – general • Police • Local Authority/ Local Council • AA/ RAC • Transport for London/ London Transport • GLA/ Mayor of London • Other (specify) • Don't know 	Base: All who have seen/heard road safety advertising (Code 1 at Q19)
21	<p>Have you seen this logo before? (SINGLE CODE)</p> <p>SHOW THINK! LOGO</p> <ul style="list-style-type: none"> • Yes • No • Don't know 	Base: All Respondents

22	<p>To what extent do you agree or disagree with the following statements about the THINK! campaign...</p> <p>RANDOMISE</p> <ul style="list-style-type: none"> • Strongly agree • Slightly agree • Neither agree nor disagree • Slightly disagree • Strongly disagree • Don't know <p>When I see something with the THINK! logo on, I trust it</p> <p>When I see something with the THINK! logo on, I take notice</p> <p>The THINK! campaign is really making a difference to the safety of our roads</p>	Base: All who recognise Think! logo (Code 1 at Q21)
23	<p>Here is a list of words, both favourable and unfavourable which could be used to describe the THINK! campaign.</p> <p>Please could you pick out the words that you feel best describe the THINK! campaign from your point of view. (MULTICODE)</p> <p>SHOW SCREEN. CODE ALL THAT APPLY. RANDOMISE LIST.</p> <ul style="list-style-type: none"> • Caring • Expert • Helpful • Boring • Intrusive • Old fashioned • Irrelevant • Independent • Innovative • Bossy • Thought provoking • Influential • None of these • Don't know 	Base: All who recognise Think! logo (Code 1 at Q21)
24	<p>Approximately how often do you drink alcohol?</p> <ul style="list-style-type: none"> • Every day/most days • 4-5 days a week 	Base: All respondents aged 18 years +

	<ul style="list-style-type: none">• 2-3 days a week• Once a week• Once or twice a month• Once every couple of months• Less than this or never• Refused• Don't know	
--	--	--