

# THINK! Road Safety Biennial Survey 2006-2015

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# 1

## Introduction and background

# Research aims

## **The Biennial Survey focuses on attitudes & behaviours across a range of issues.**

It aims to:

- explore attitudes towards driving, road safety and other road users over time
- measure prevalence of different driving behaviours, and change in prevalence over time
- measure awareness of, and attitudes towards, the THINK! brand as a whole

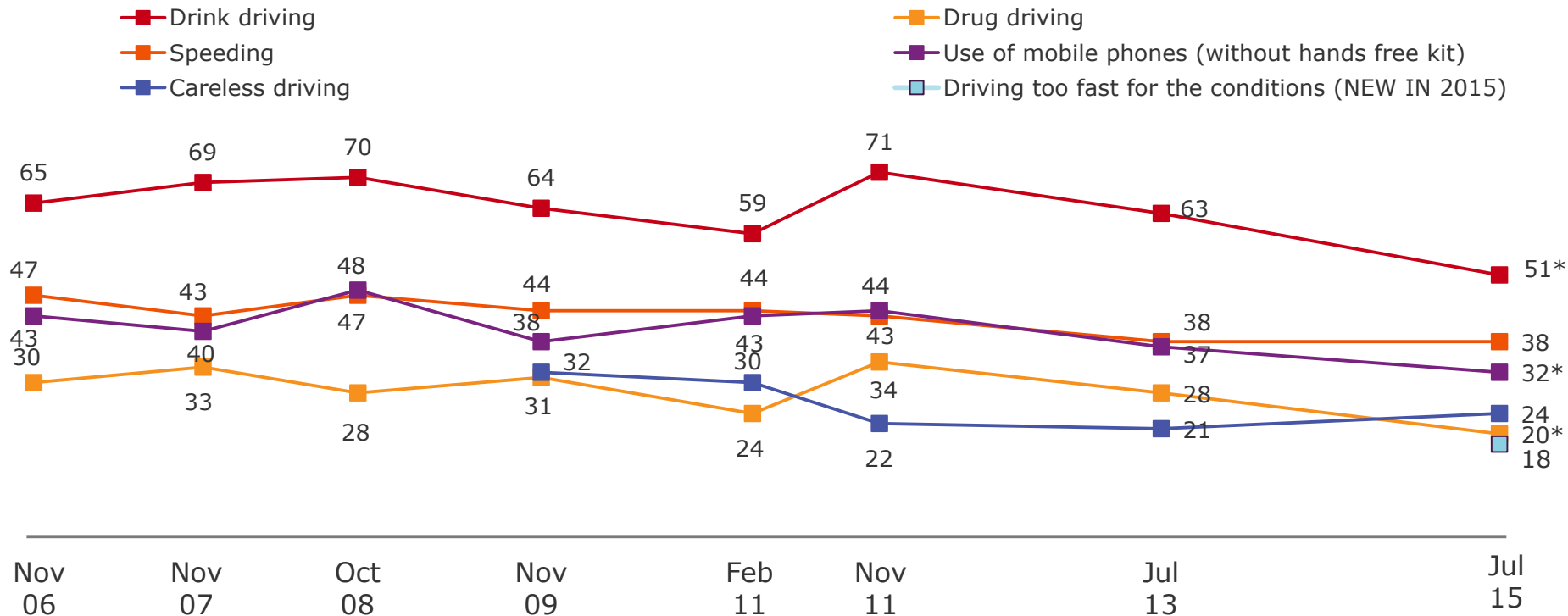


# 2

## General attitudes towards road safety

The proportions identifying drink driving, use of mobile phones and drug driving as one of 3 most important issues for the government to address have declined over the last two years, *but* this may be a design effect due to additional measure added this year

%



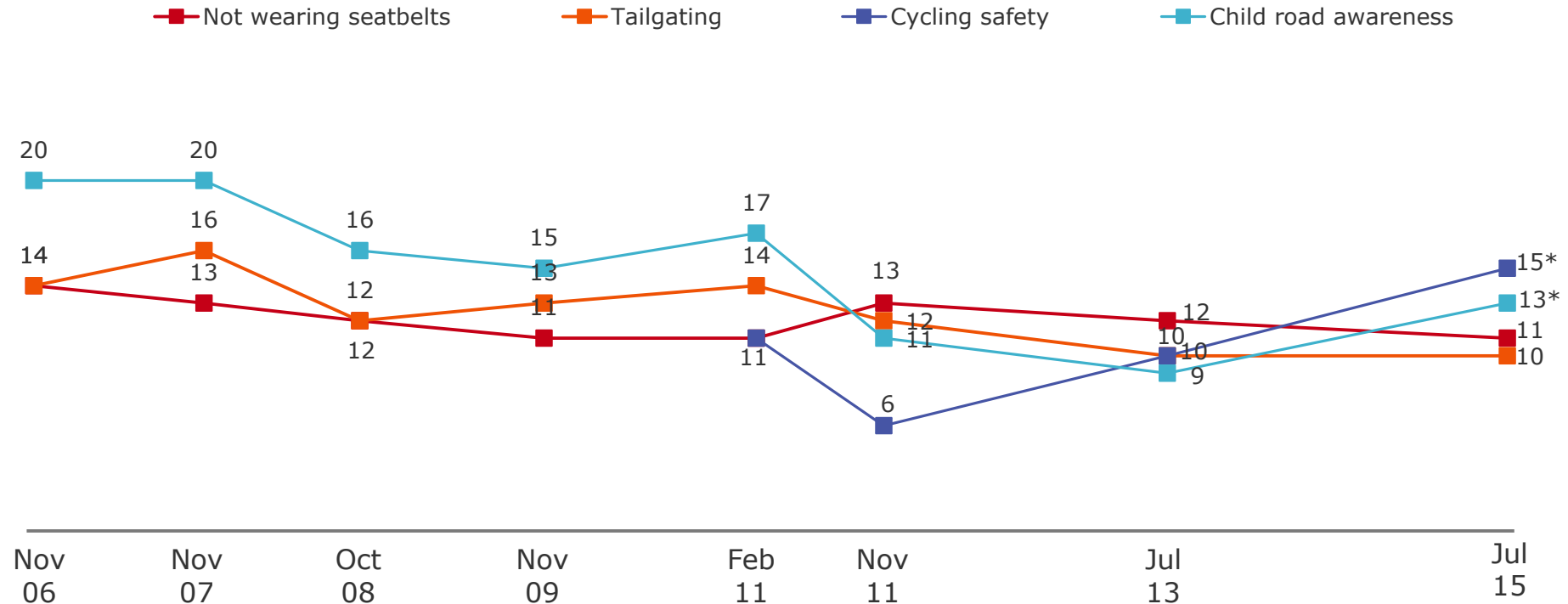
\*Sig diff 2013-2015  
Sig. tested at 95%

Q7. 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.

Base: All respondents June '05 (2,240), Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1853) July '15(1090)

However, cycling safety continues to increase in importance overtaking child road awareness (despite a slight recovery for this measure)

%



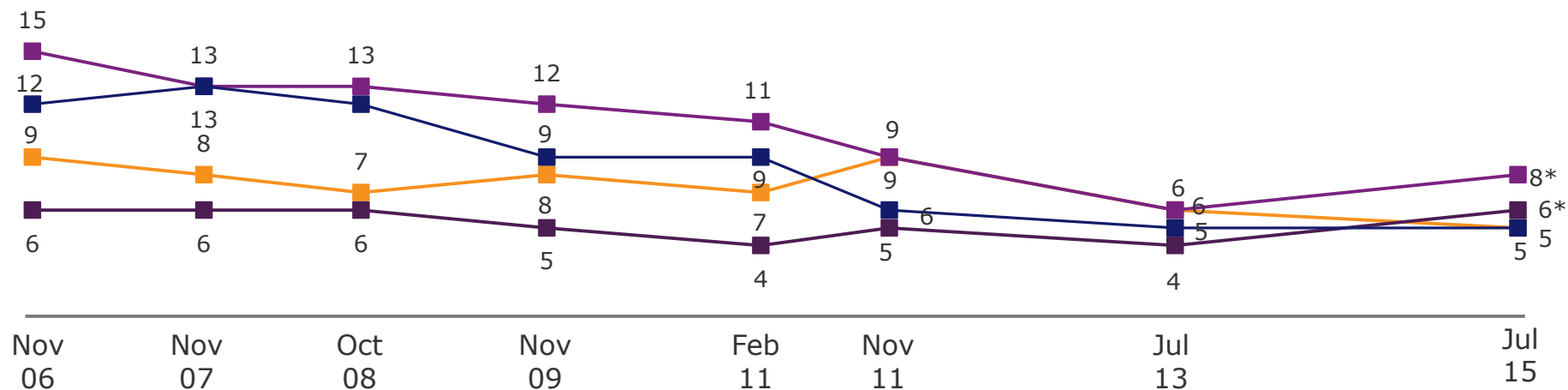
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Q7. Which of the issues below do you consider to be the most important issues that the Government should address to improve road safety? Please pick your top three.  
Base: All respondents June '05 (2,240), Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1853) July '15(1090)

## But other issues are relatively stable

%

Not using child restraints   Roadrage   Motorcycle accidents   Driving while tired



\*Sig diff 2013-2015  
Sig. tested at 95%

Q7. 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.  
Base: All respondents June '05 (2,240), Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1853) July '15(1090)



When issues are ranked, the top five most important issues have remained largely the same over the last ten years. As mentioned, however, cycling safety is gaining in importance

#### Rank #

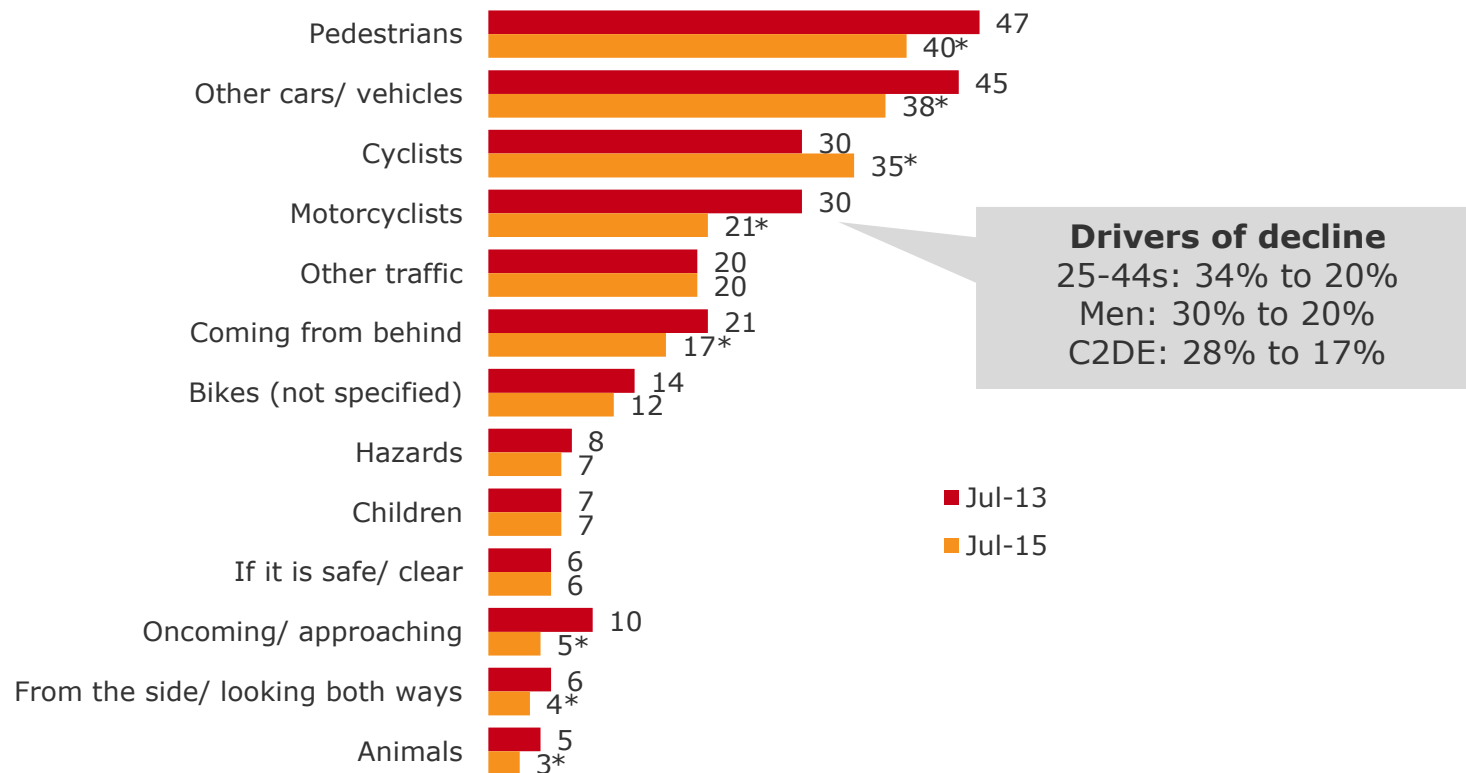
	Jun 05	Nov 06	Nov 07	Oct 08	Nov 09	Feb 11	Nov 11	Jul 13	Jul 15
Drink driving	1	1	1	1	1	1	1	1	1
Speeding	2	2	2	2	2	2	3	2	2
Use of mobile phones (without hands free kit)	N/A	N/A	N/A	N/A	3	3	2	3	3
Careless driving	N/A	N/A	N/A	N/A	4	4	5	5	4
Drug driving	3	3	3	3	5	5	4	4	5
Driving too fast for the conditions	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	6
Cycling safety	N/A	N/A	N/A	N/A	N/A	10	12	8	7
Child road awareness	6	4	4	4	6	6	8	9	8
Not wearing seatbelts	4	6	7	7	9	9	6	6	9
Tailgating	N/A	7	5	6	7	7	7	7	10
Roadrage	N/A	5	6	5	8	8	9	10	11
Motorcycle accidents	8	10	10	10	13	14	14	14	12
Not using child restraints	7	9	9	9	12	13	10	11	13
Use of mobile phone with a hands free kit	N/A	N/A	N/A	N/A	11	12	11	12	14
Driving while tired	5	8	8	8	10	11	13	13	15

Q7. 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.

Base: All respondents June '05 (2,240), Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1853) July '15(1090)

In line with cycling gaining in importance, the proportion saying they look out for cyclists in their mirrors at junctions has increased since 2013. More worryingly, the proportions saying motorcyclists and pedestrians has declined

%



\*Sig diff 2013-2015  
 Sig. tested at 95%

Q14. What do you look out for when checking your mirrors or whilst at a junction?  
 Base: All car/van/lorry drivers July '13 (1151) July '15(716)

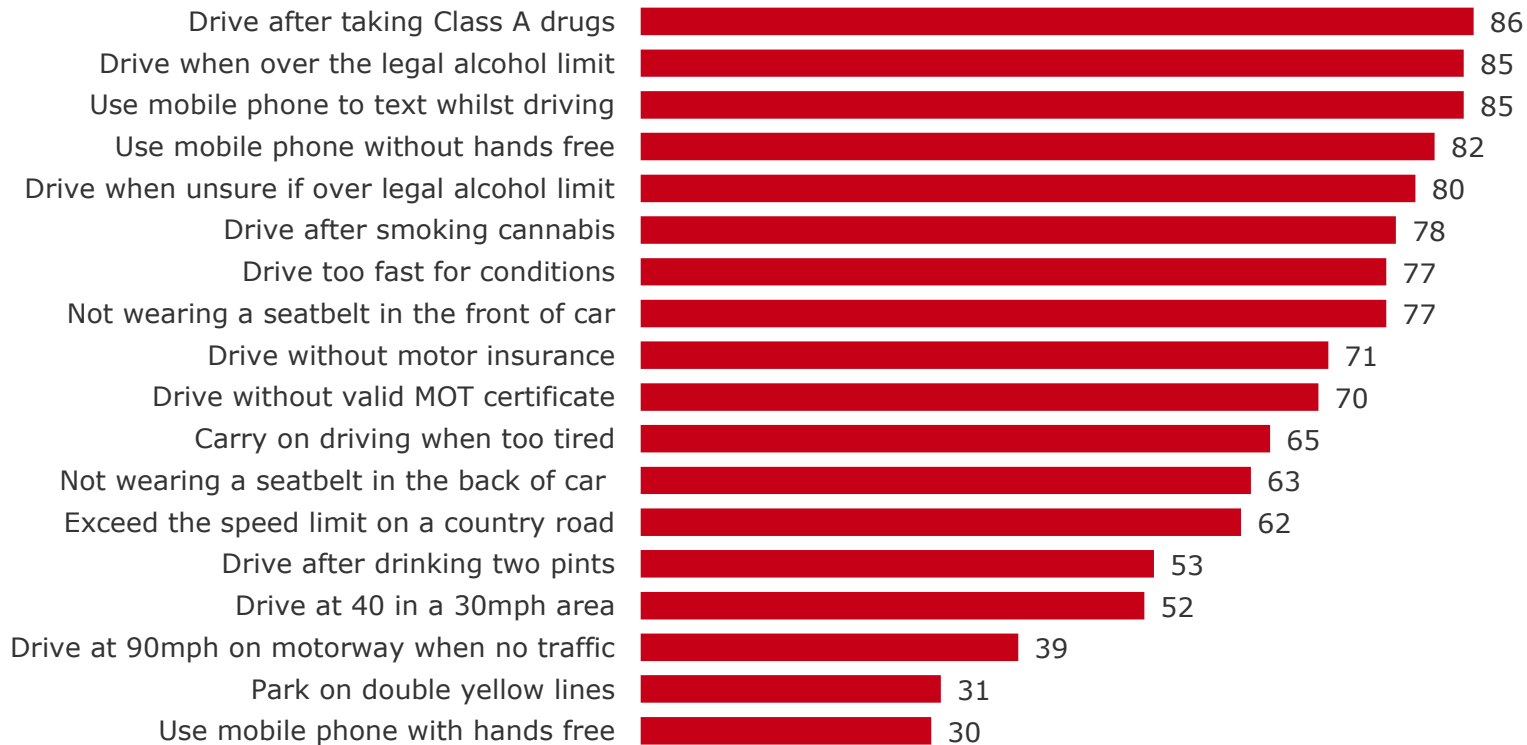
All responses 5% or over

# 3

## Dangerous driving behaviours - 2015 topline

# Driving while under the influence and using mobile phones (not hands free) viewed as the most dangerous driving behaviours

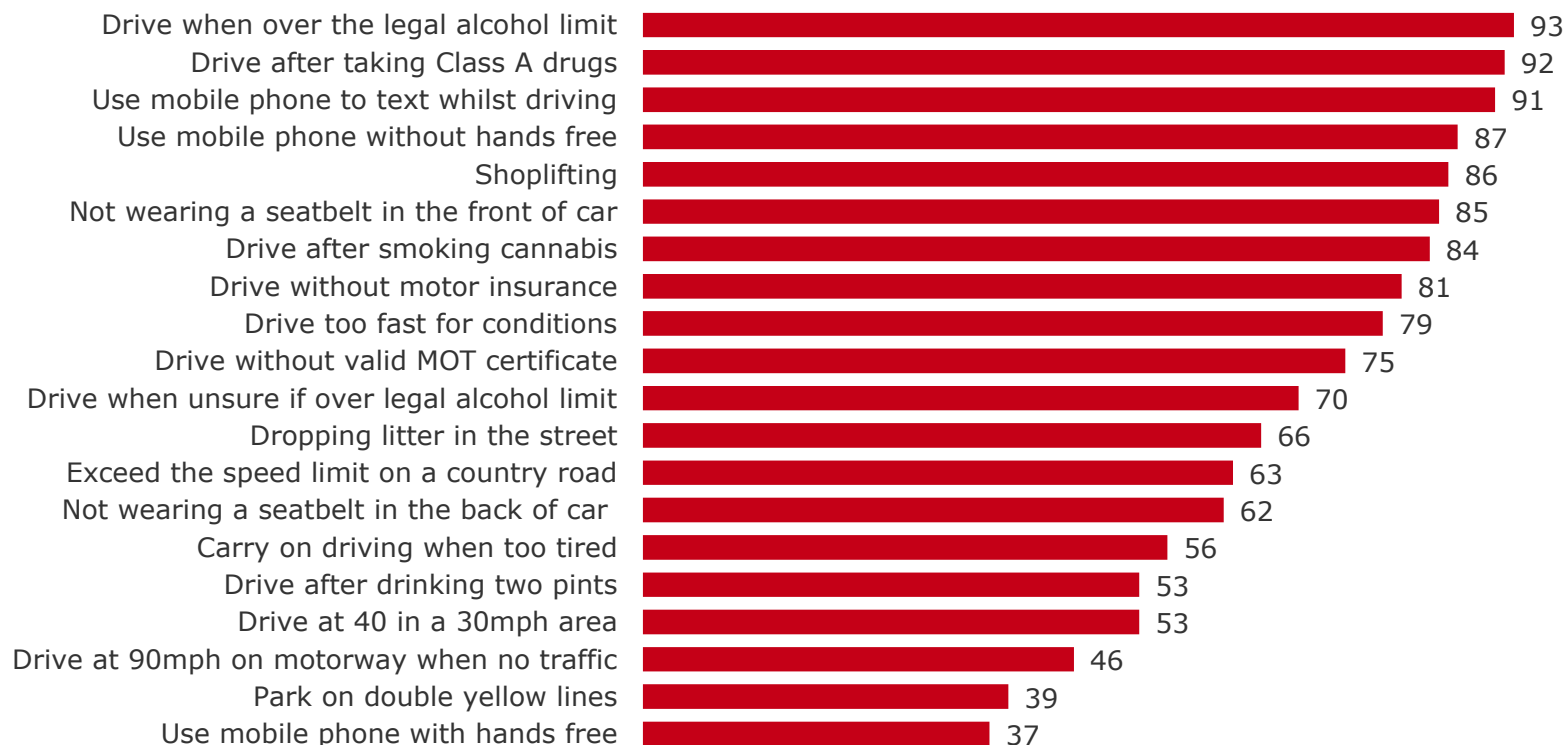
% Agree completely July 2015



Q8. To what extent would you agree or disagree that the following behaviours are dangerous?  
Base: All respondents Jul '15 (1090)

# Similarly driving while under the influence and using mobile phones (not hands free) viewed as the most unacceptable driving behaviours

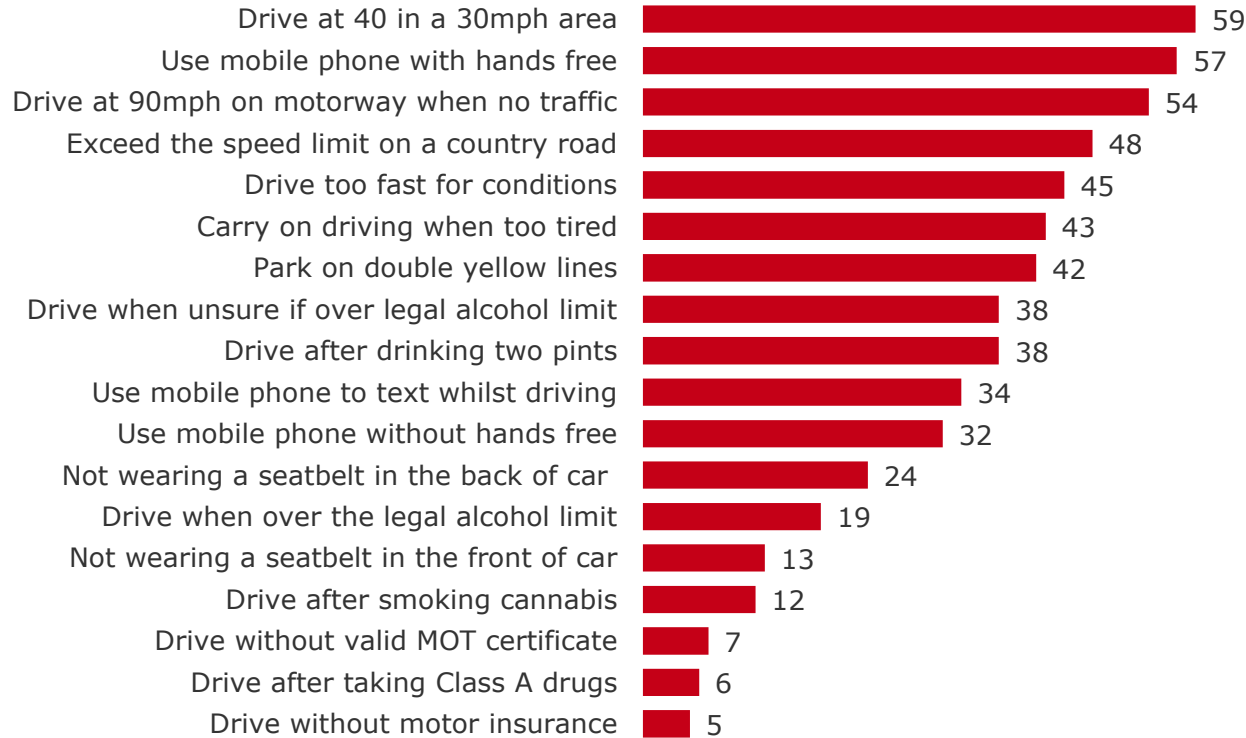
## % 'Extremely unacceptable' July 2015



Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').  
Base: All respondents Jul '15 (1090)

# People are most likely to know someone who speeds, with driving at 40mph in a 30mph area the most common speeding behaviour

% Know anyone who does this July 2015



Q16. Thinking about people you know who drive, how many of them do you think...? Data shown = Net: 'Know anyone who does this'  
Base: All motorists aged 18 or over Jul '15(729)

# People are most likely to admit to driving at 40mph in a 30mph area and exceeding the speed limits on country roads

% Do 'AT ALL' July 2015



Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'  
Base: All motorists aged 18 or over Jul '15(729)

# 4

## Dangerous driving behaviours – Issue by issue



# 4.1

## Drink driving

# Drink driving

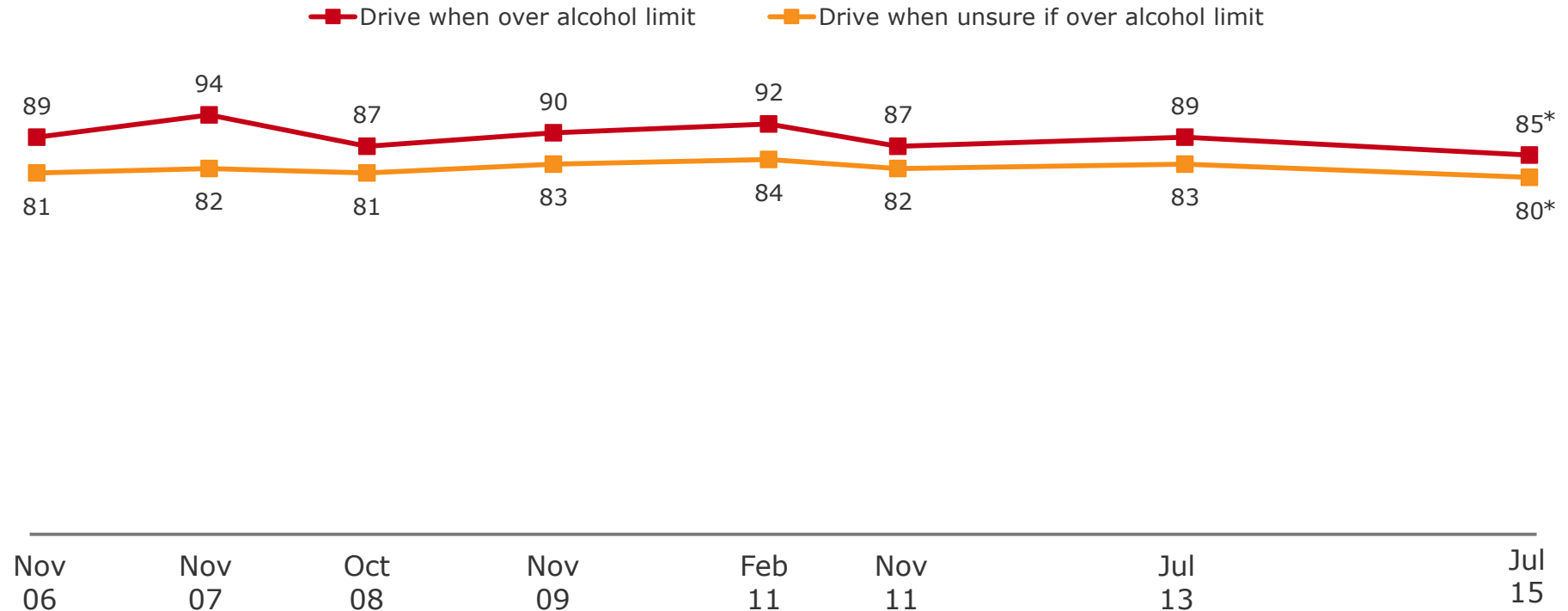
While the vast majority of people agree that it is dangerous and unacceptable to drive when over the legal alcohol limit or when unsure, the level of agreement has fallen in 2015. The decline in the numbers viewing it as unacceptable was driven by 17-34 year old motorists.

However, fewer people now know someone that drives when over the legal alcohol limit or when unsure (when compared to 2013).



# There was a reduction in agreement that drink driving is dangerous in 2015

% of all respondents agreeing completely that drink driving behaviours are dangerous



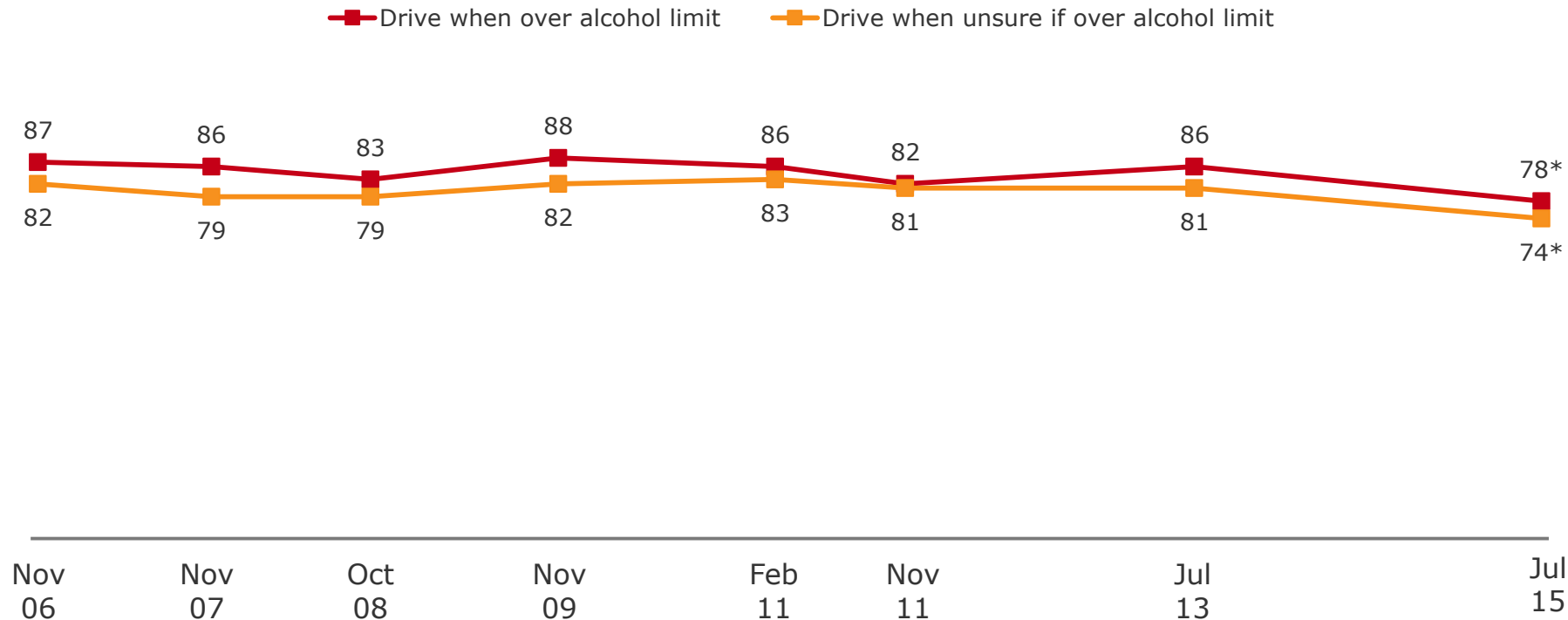
\*Sig diff 2013-2015  
Sig. tested at 95%

Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1,853), July '15 (1090)

But this reduction was driven especially by **non** motorists

% of non motorists agreeing completely that drink driving behaviours are dangerous



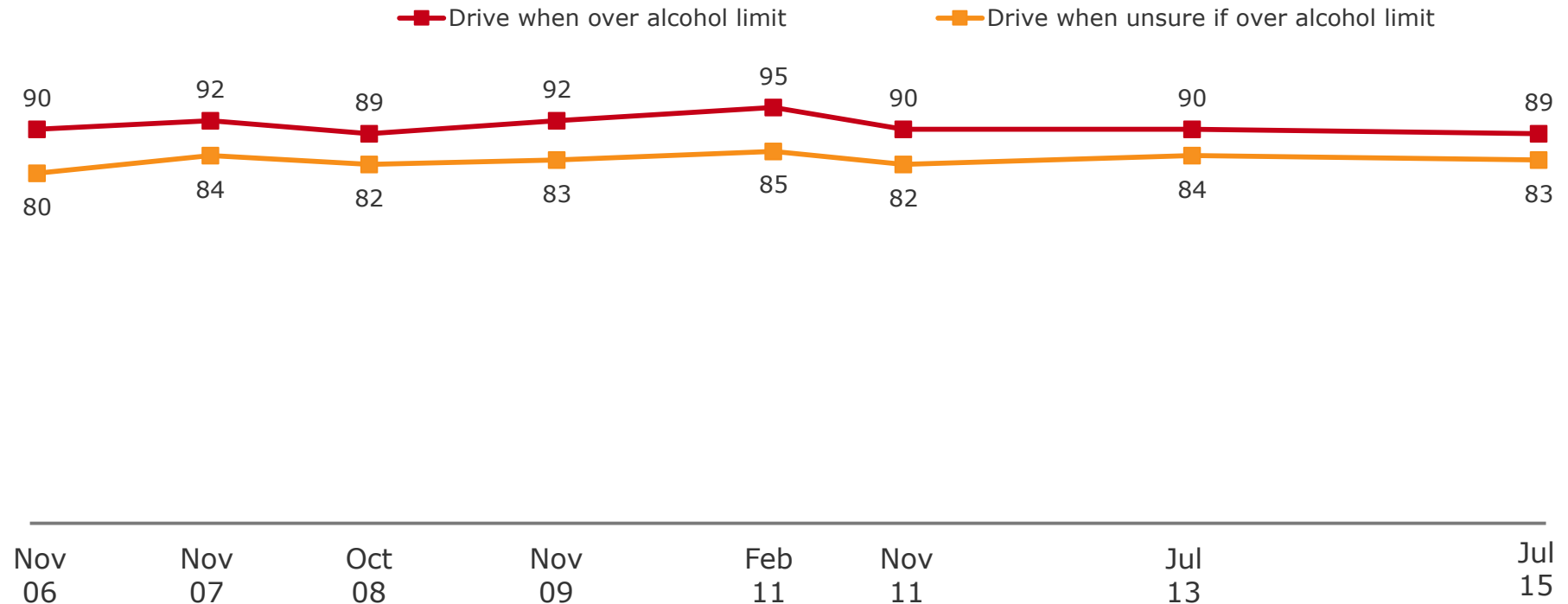
\*Sig diff 2013-2015  
Sig. tested at 95%

Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All non motorists Nov '06 (770), Nov '07 (745), Oct '08 (782), Nov '09 (777), Feb '11 (632), Nov '11 (823), Jul '13 (691) Jul '15(361)

# Among motorists the proportions agreeing drink driving is dangerous has remained stable

% of motorists agreeing completely that drink driving behaviours are dangerous



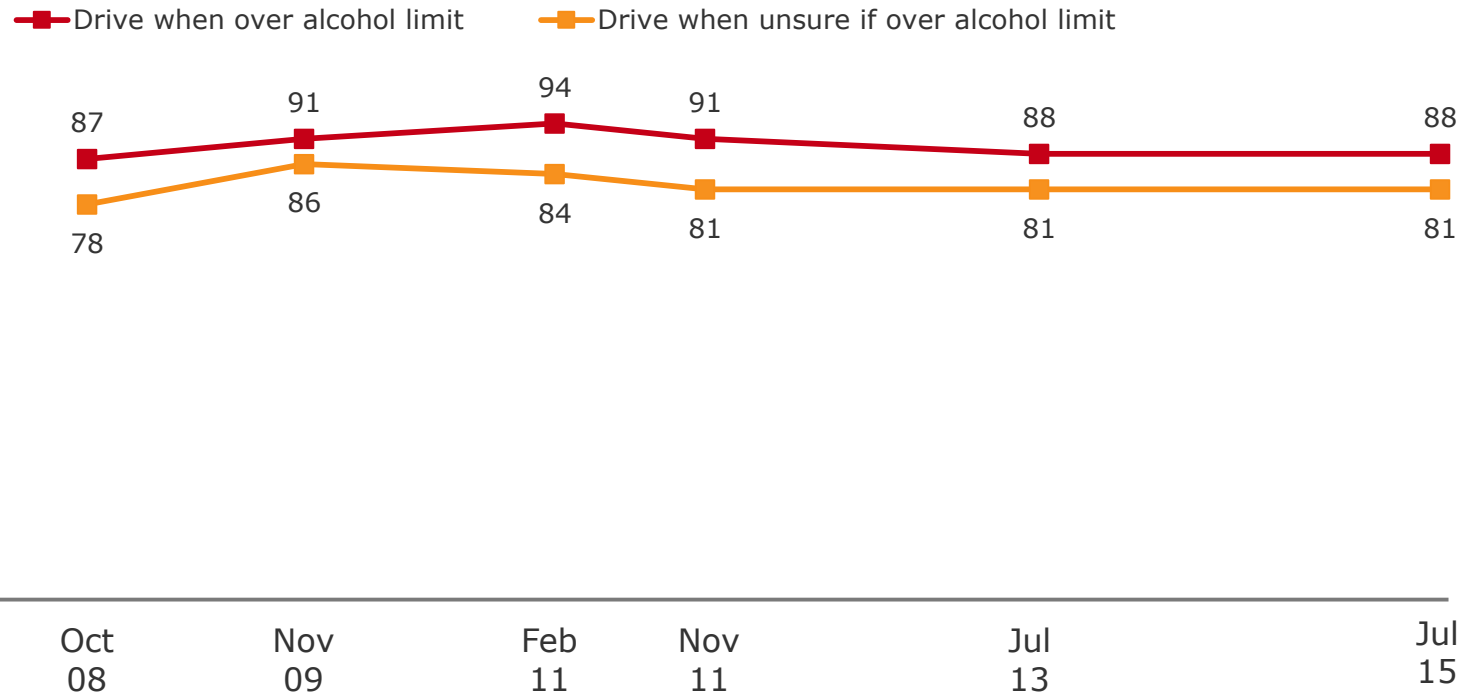
\*Sig diff 2013-2015  
Sig. tested at 95%

Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All motorists Nov '06 (1,489), Nov '07 (1,274), Oct '08 (1,227), Nov '09 (1,233), Feb '11 (1,371), Nov '11 (1,184), Jul '13 (1,162), July'15 (729)

...as it has for 17-34 year old motorists

**% of motorists aged 17-34 agreeing completely that drink driving behaviours are dangerous**



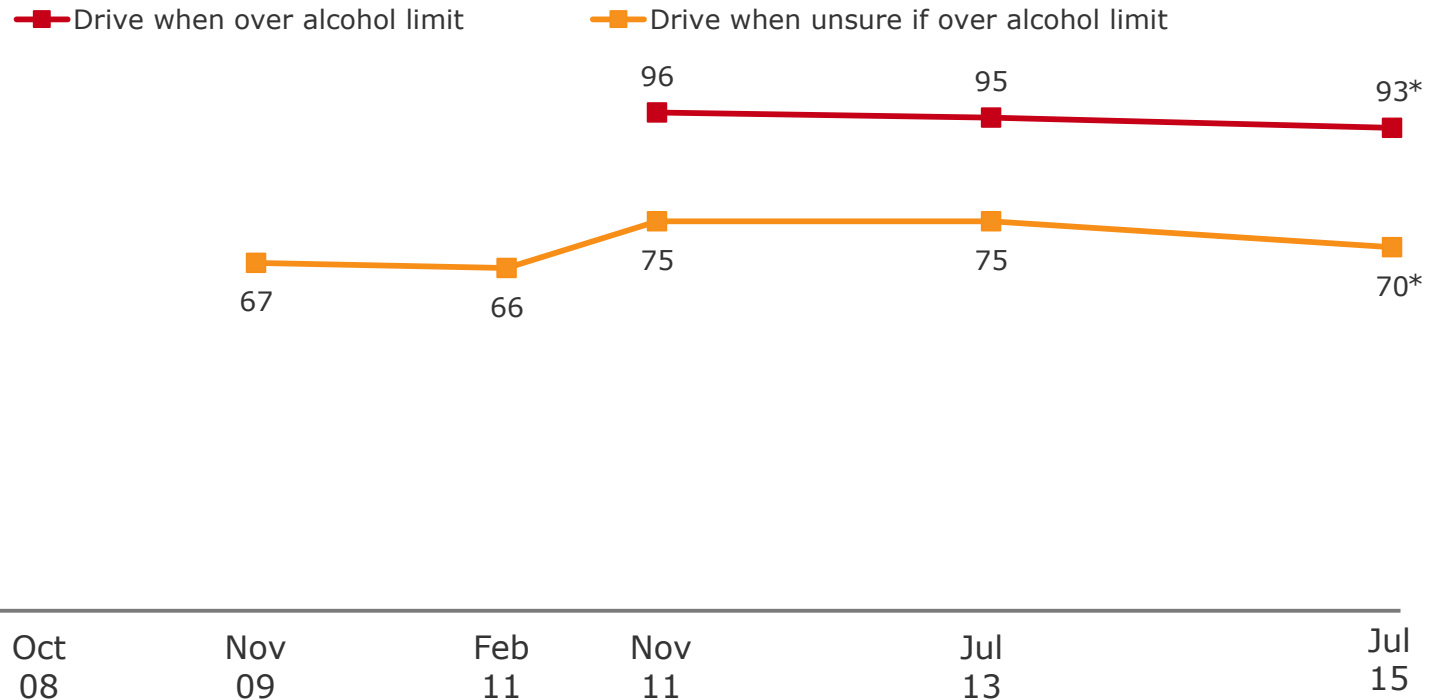
\*Sig diff 2013-2015  
Sig. tested at 95%

Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: 17-34 year old motorists Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

# Agreement that drink driving is extremely unacceptable has reduced slightly in the last two years

% of all respondents agreeing that drink driving behaviours are extremely unacceptable



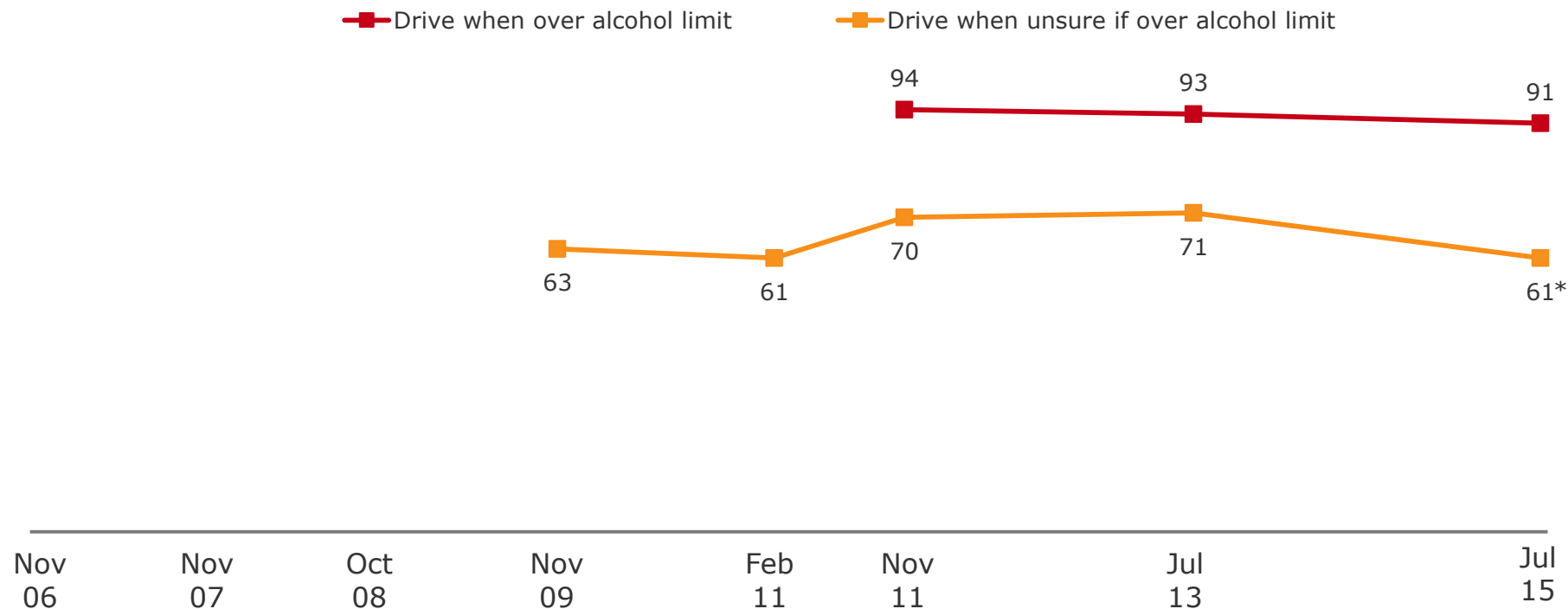
\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1,853), July '15 (1090)

# The reduction seen for 'driving when unsure if over the alcohol limit' was driven by 17-34 year olds

% of 17-34s agreeing that drink driving behaviours are extremely unacceptable



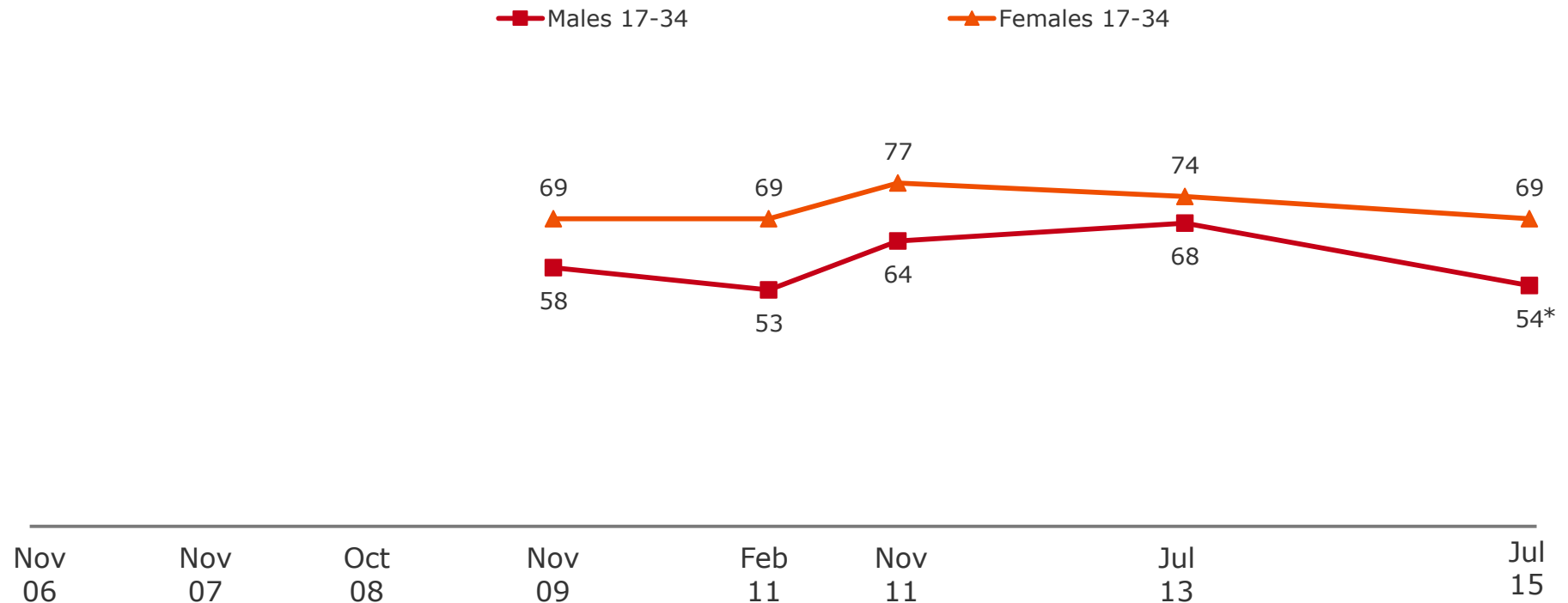
\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').  
Base: 17-34s Nov '09 (584) , Feb '11 (490), Nov '11 (563), July'13 (481), July'15 (270)



...and within this, it was driven mainly by men

**% of 17-34s agreeing completely that driving when unsure if over the alcohol limit is extremely unacceptable**

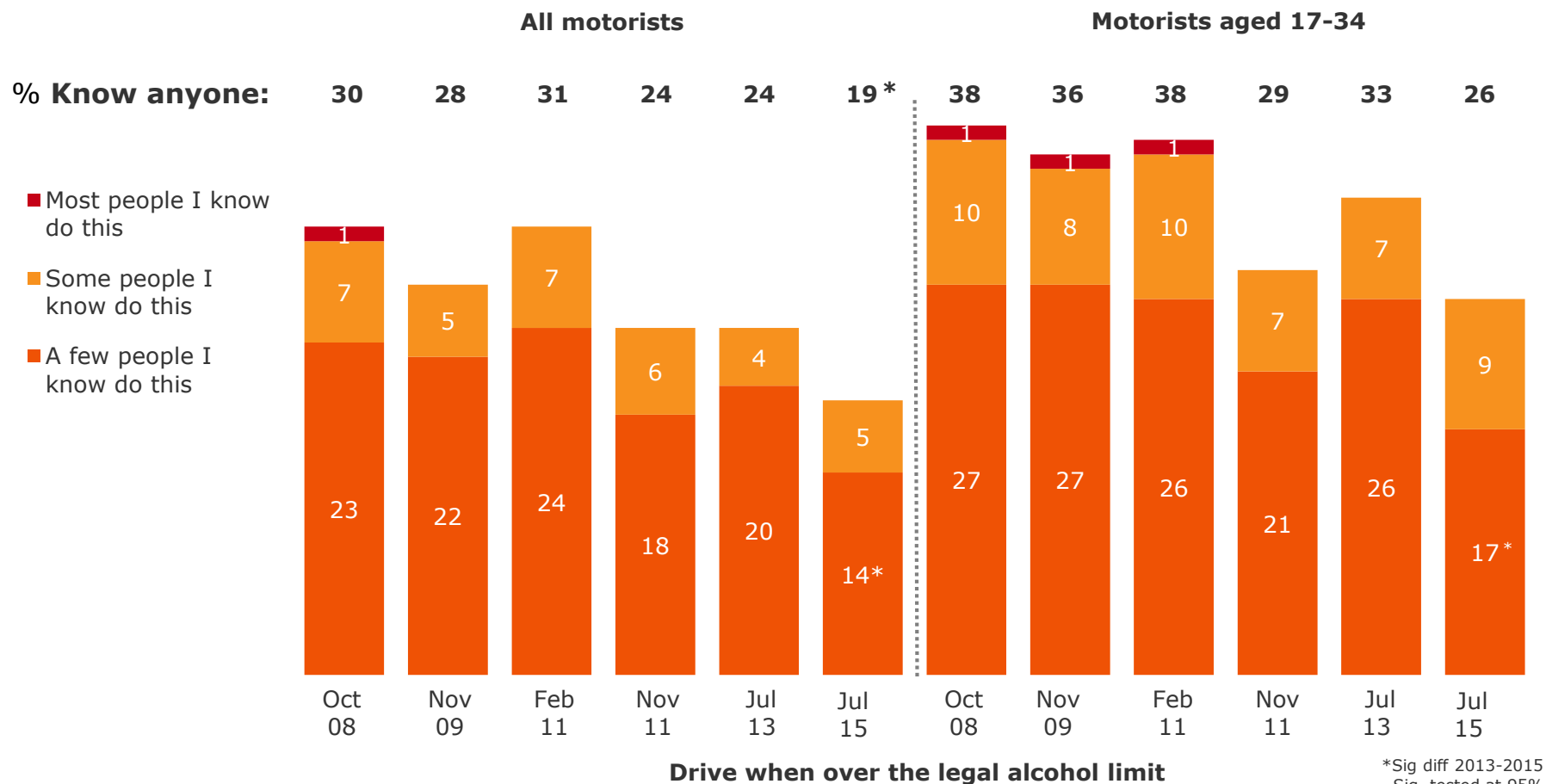


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Sig. tested at 95%

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Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July'13 (1,853), July'15 (1090)

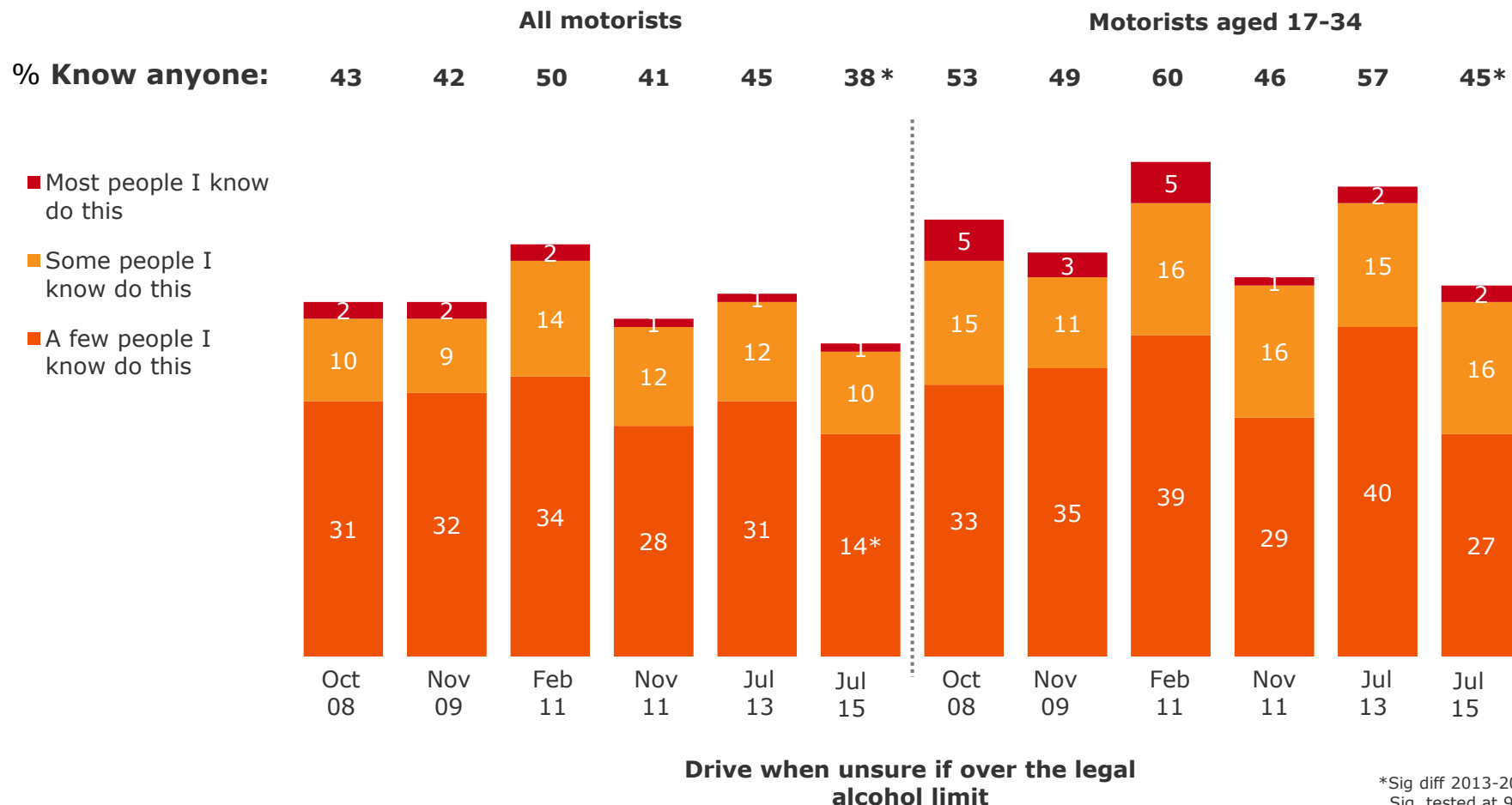
The proportion who know someone who drives when over the legal alcohol limit has declined over the last two years among all motorists and those aged 17-34



Q16. Thinking about people you know who drive, how many of them do you think...?

Base: All motorists aged 18 or over 2008 (1,219), 2009 (1,229), Feb 2011 (1,369), Nov 2011 (1,176), Jul 2013 (1,160), Jul 2015 (729)  
17-34 year old motorists Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

Similarly, the number who know someone who drives when unsure if over the legal alcohol limit has reduced in both groups



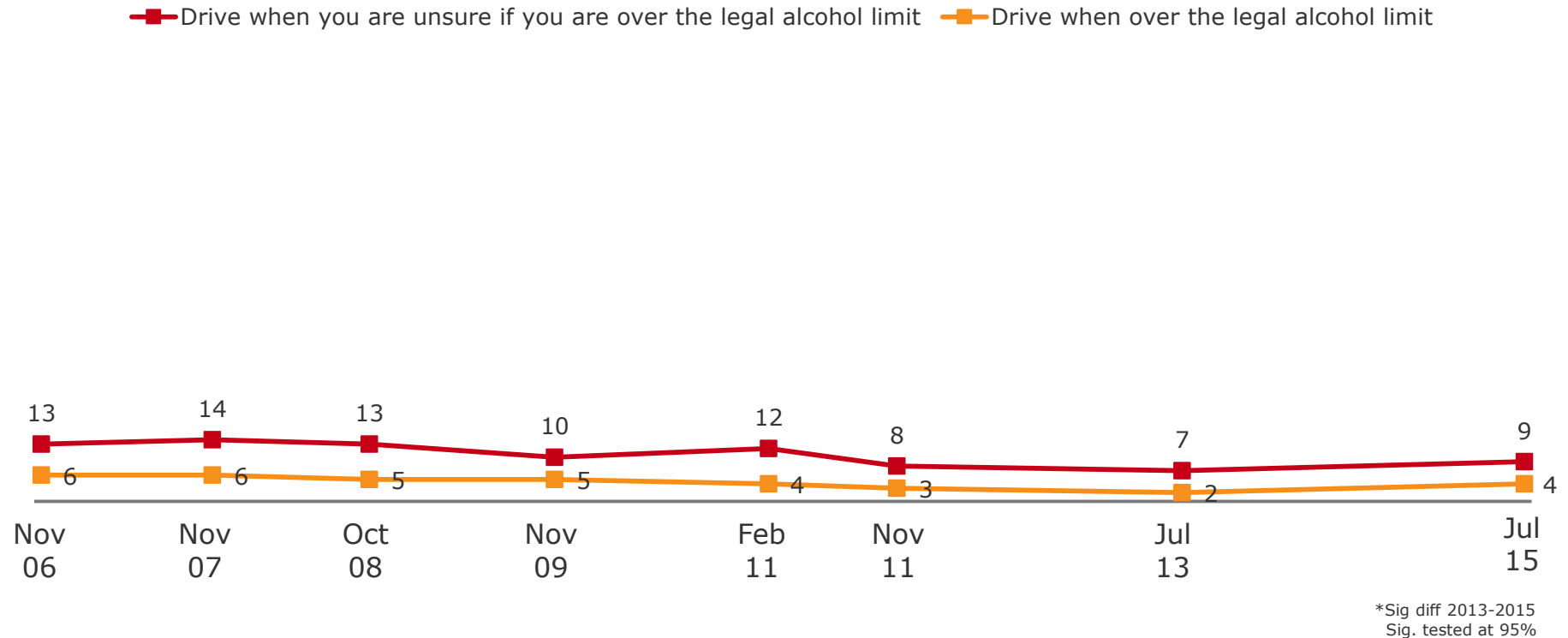
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17-34 year old motorists Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

Those admitting to drink driving has remained stable since 2013 but has declined slightly over the last ten years

### % of motorists who engage at all in drink driving behaviours

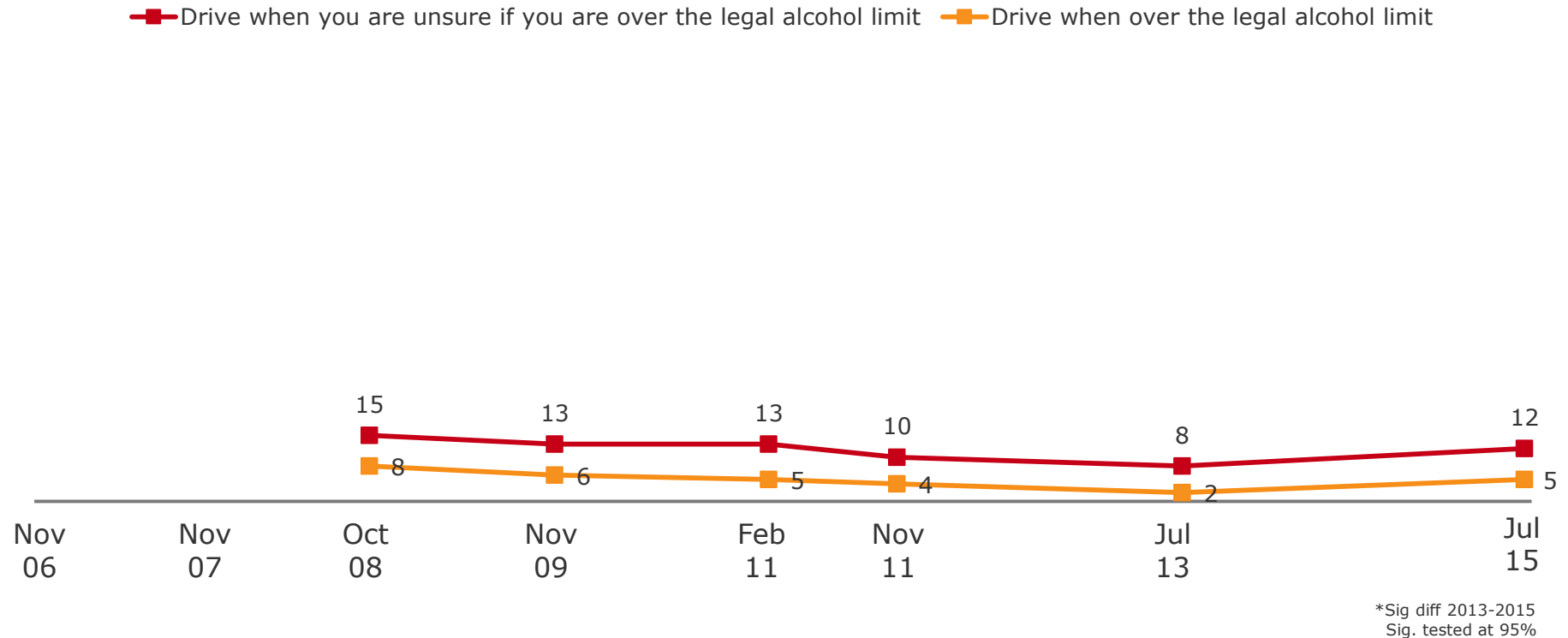


Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'

Base: All motorists Jun 05 (1,517) / All motorists aged 18+ Nov '06 (1,462), Nov '07 (1,258), Oct '08 (1,219), Nov '09 (1,229), Feb '11 (1,369), Nov '11 (1,176), Jul'13 (1,160), Jul'13 (729)

# The number of 17-34s admitting to drink driving has remained stable

## % of motorists aged 17-34 who engage at all in drink driving behaviours



Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'  
Base: 17-34 year old motorists Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

# 4.2

## Drug driving

# Drug driving

This is a minority behaviour, with very few respondents saying that they ever drive after taking Class A drugs or cannabis. Despite this, there is a significant increase in those stating that they know someone who ever drives after using cannabis.

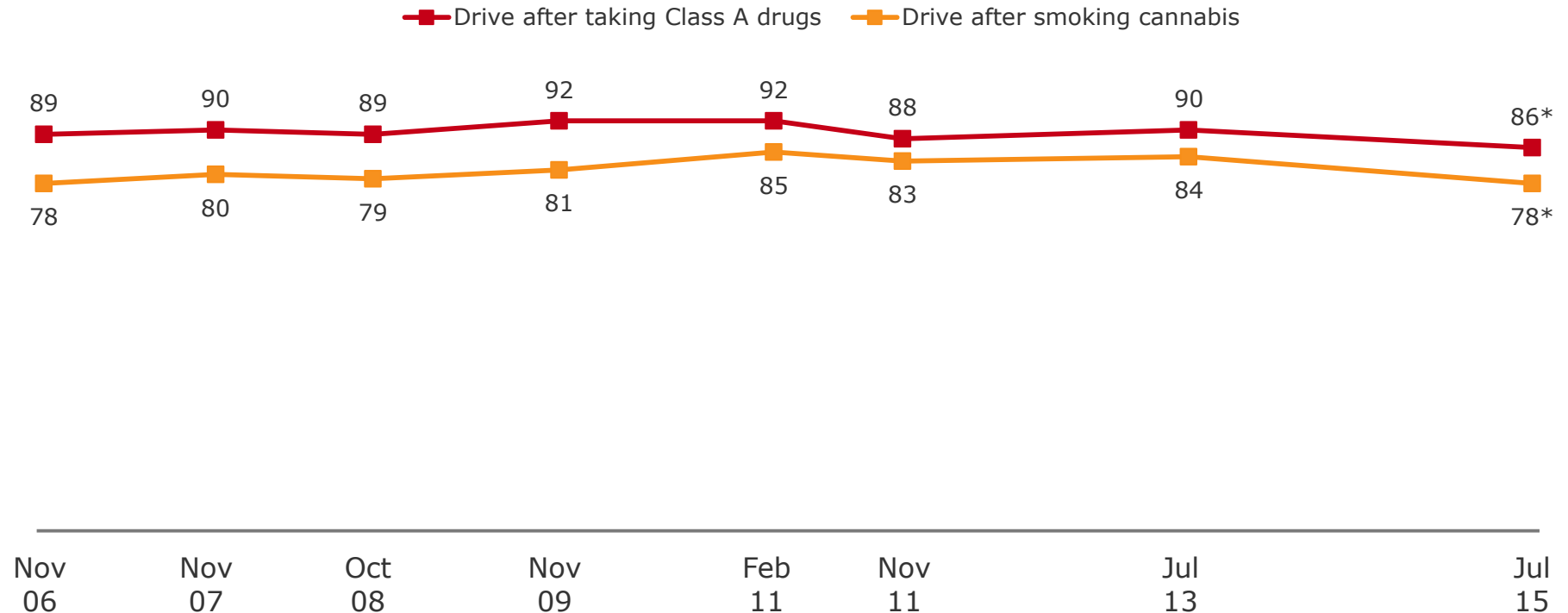
This has been accompanied by significant decreases in the number of those thinking that these actions are dangerous and unacceptable, although the vast majority still agree.

These changes have largely been driven by women, people aged 30+ and social grades C2DE. Decreases were also greater for people who did not recall any road safety advertising. Non-motorists remain less likely to feel drug driving is dangerous, and there has been a greater decrease in agreement for this group.



There has been a small drop in agreement that it is dangerous to drive after taking each of Class A drugs and cannabis, with cannabis again perceived as less dangerous.

% of all respondents agreeing completely that drug driving behaviours are dangerous



\*Sig diff 2013-2015  
Sig. tested at 95%

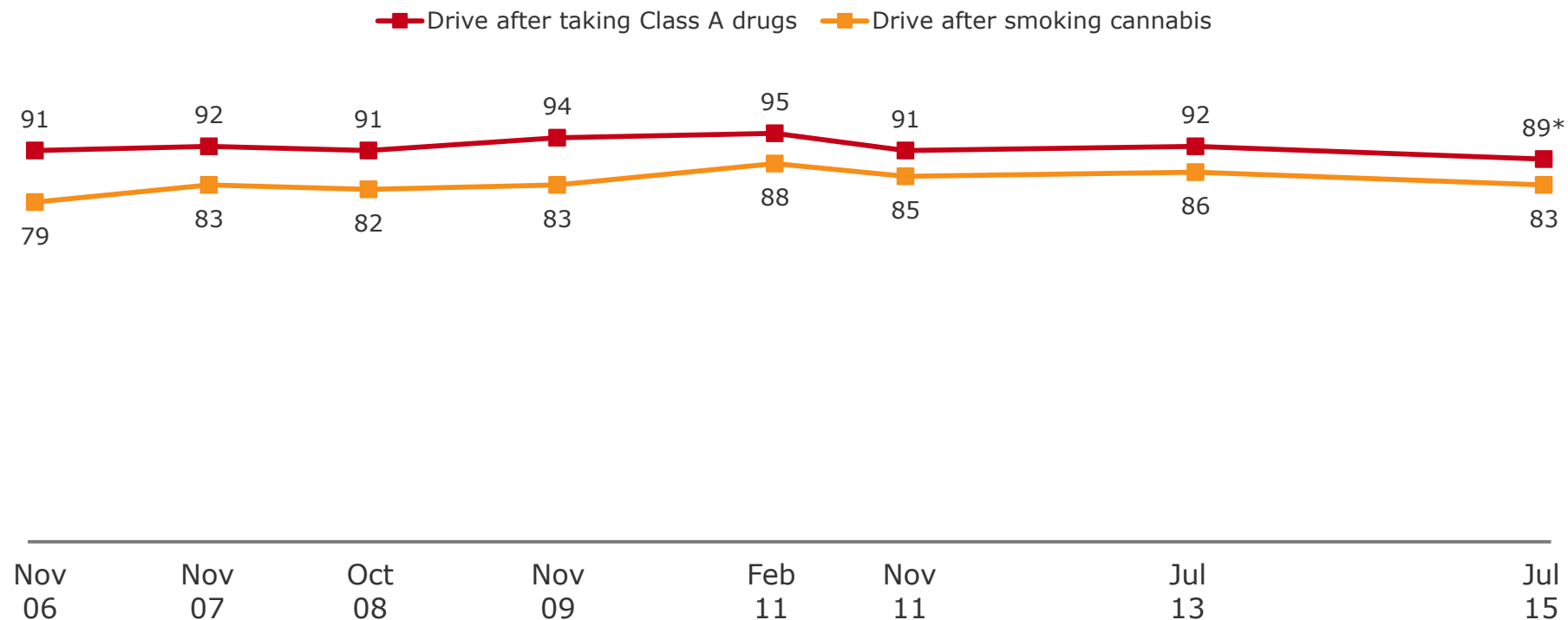
Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul'13 (1,853) , Jul'15 (1090)



Among motorists there has also been a drop in agreement that drug driving behaviours are dangerous, but this is only a significant difference for Class A drugs.

% motorists agreeing completely that drug driving behaviours are dangerous



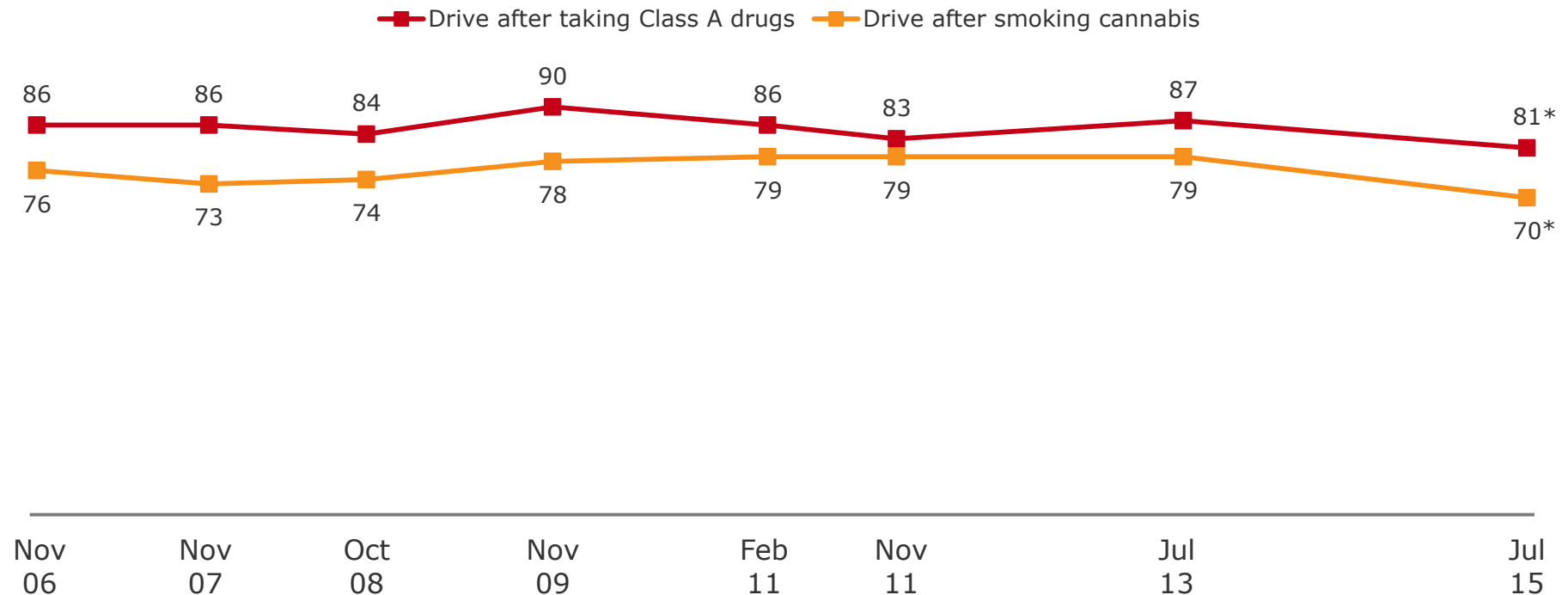
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Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All motorists Nov '06 (1, 489), Nov '07 (1,274), Oct '08 (1,227), Oct '09 (1,233), Feb '11 (1,371), Nov '11 (1,184), Jul'13 (1,162), Jul'15 (729)

# Non-motorists are again less likely than motorists to see each behaviour as dangerous and there has been a larger drop in agreement that each drug driving behaviour is dangerous

% of non-motorists agreeing completely that drug driving behaviours are dangerous



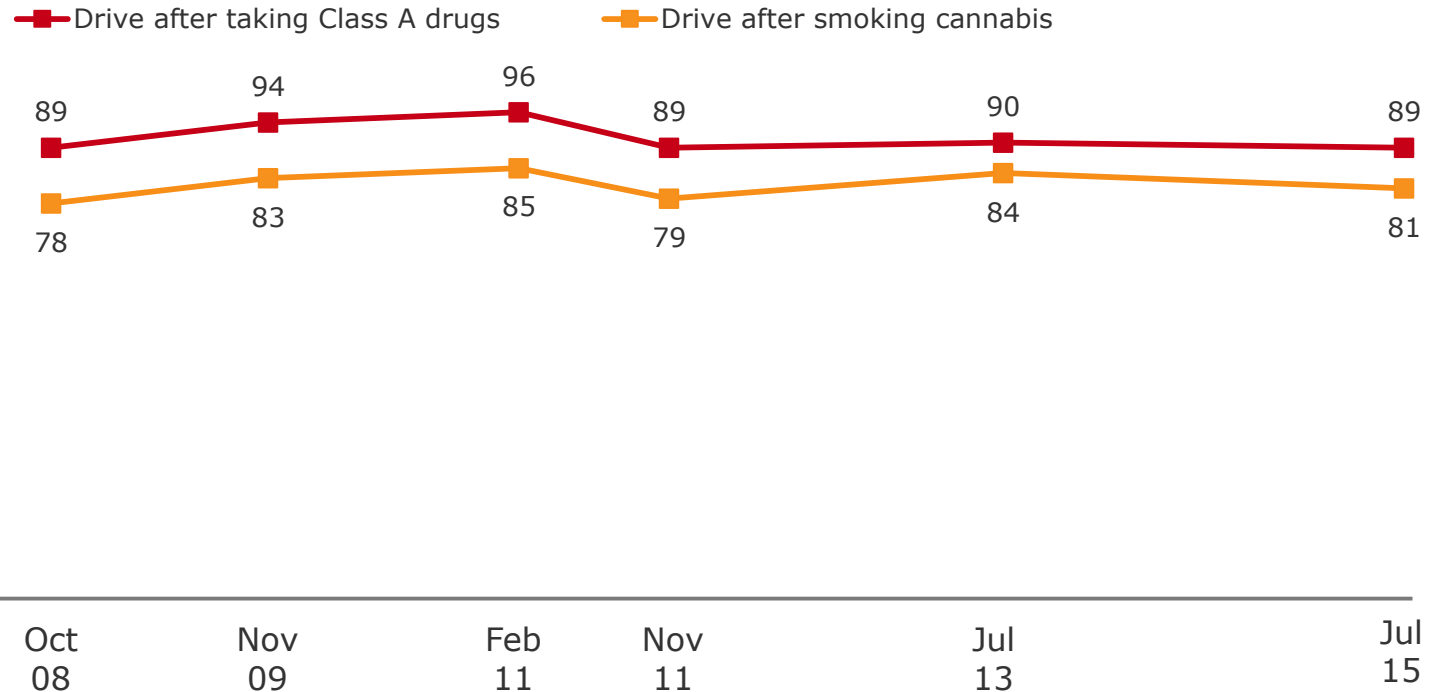
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Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All non motorists Nov '06 (770), Nov '07 (745), Oct '08 (782), Nov '09 (777), Feb '11 (632), Nov '11 (823), Jul'13 (361)

# Younger drivers continue to find drug driving behaviours dangerous with no significant changes since 2013

% of motorists aged 17-34 agreeing completely that drug driving behaviours are dangerous



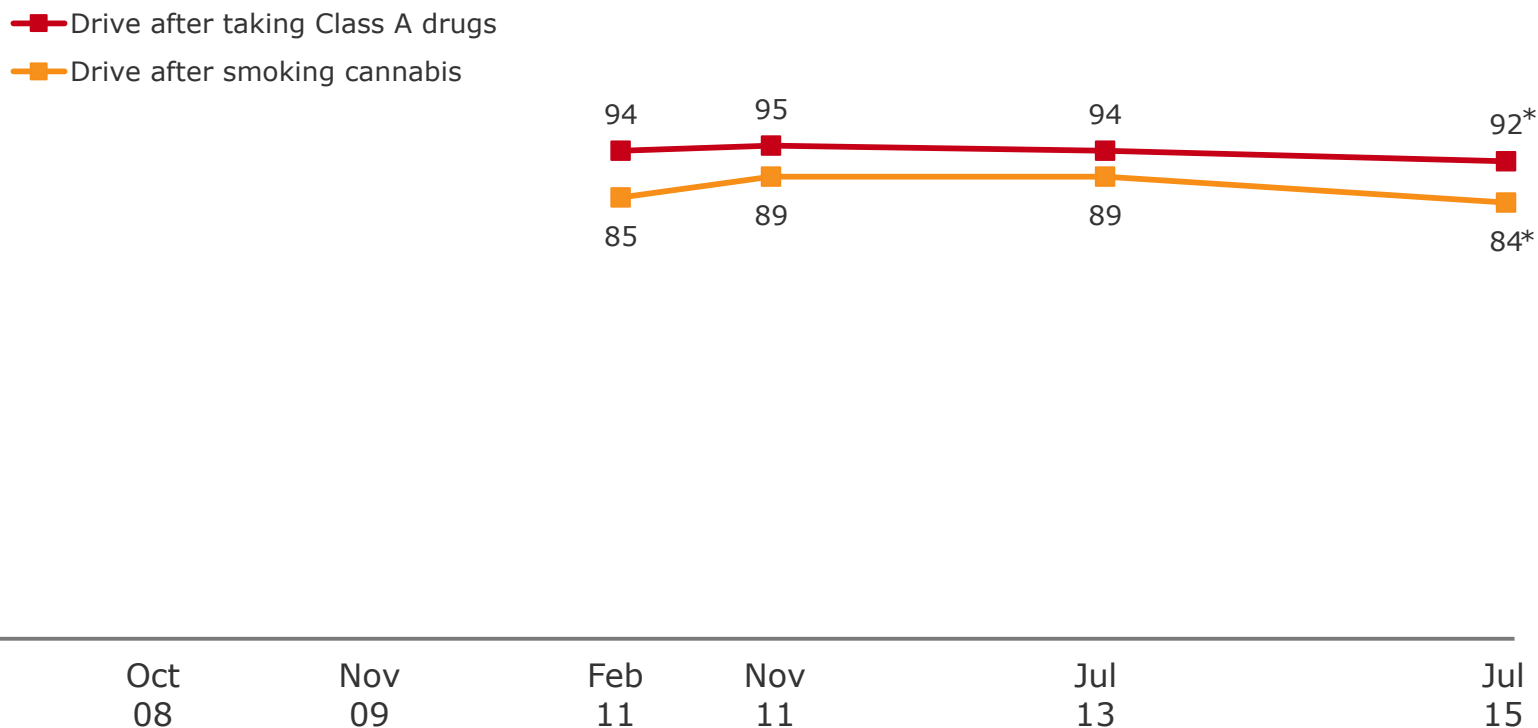
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Sig. tested at 95%

Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: 17-34 year old motorists Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

There has been a small drop in agreement that it is extremely unacceptable to drive after taking each of Class A drugs and cannabis, with cannabis again slightly less unacceptable.

**% of all respondents agreeing completely that drug driving behaviours are extremely unacceptable**



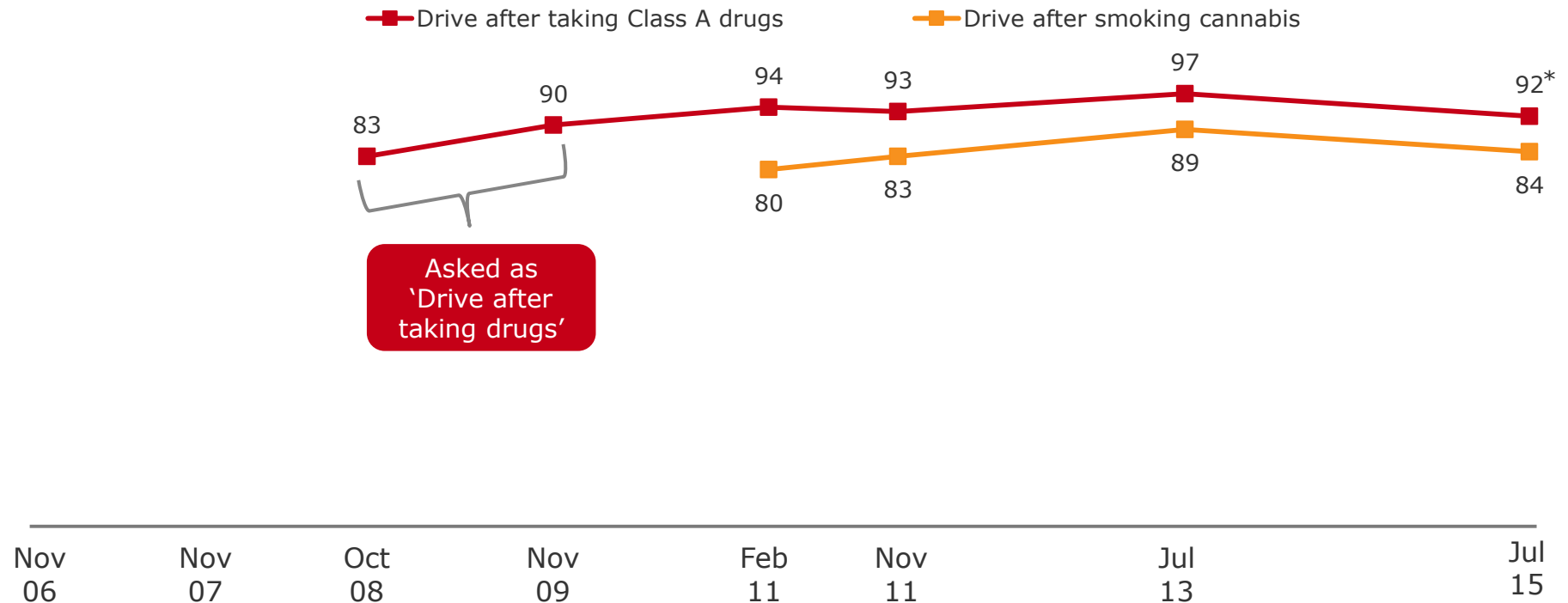
\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul '13 (1,853), Jul '15 (1,090)

The decline in perceived unacceptability of driving after taking Class A drugs was more marked among young drivers than at an overall level.

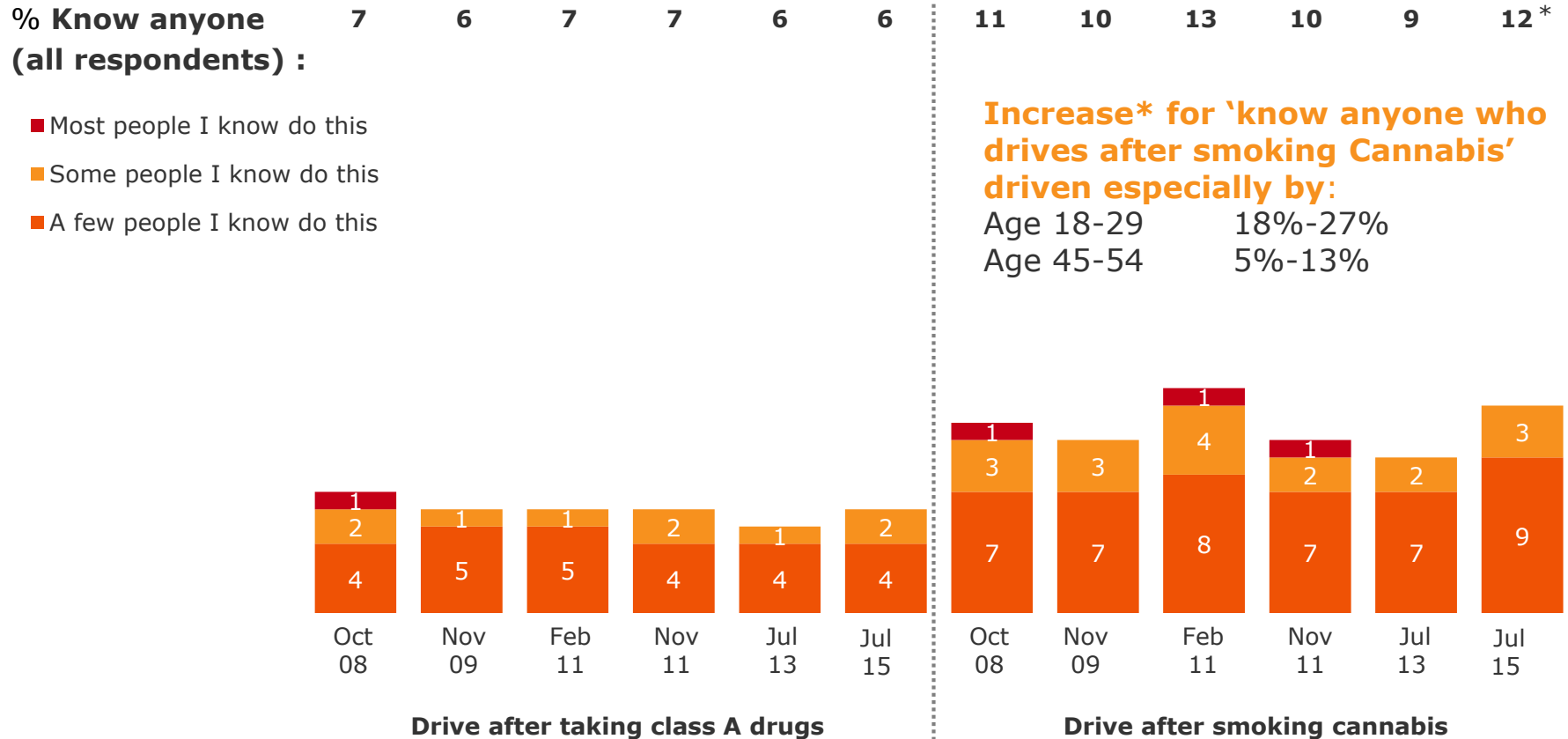
% of 17-34s agreeing that drug driving behaviours are extremely unacceptable



\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').  
Base: 17-34s Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

Few motorists know anyone who engages in drug driving behaviours, although this has returned to February 2011 levels for Cannabis (12%) particularly driven by 18-29 year olds.



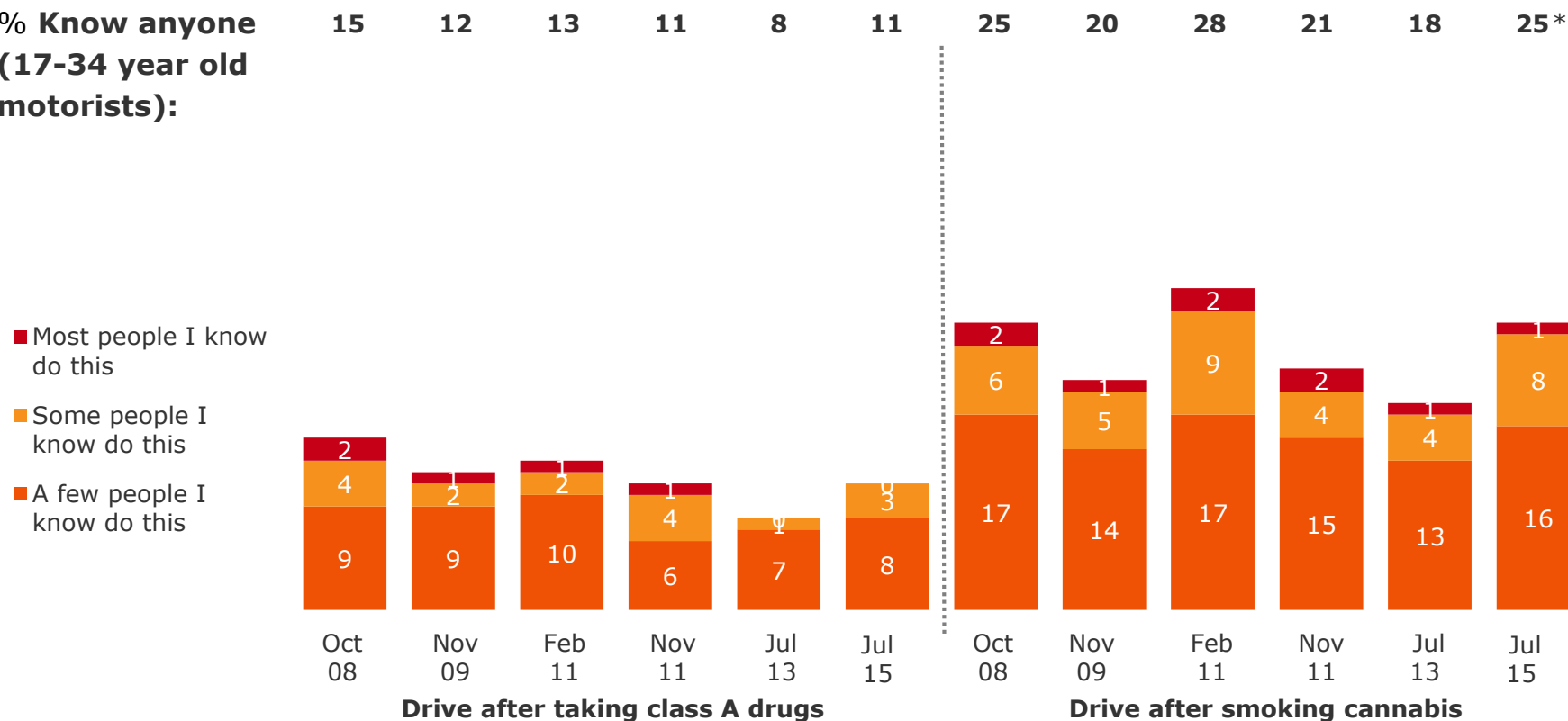
Q16. Thinking about people you know who drive, how many of them do you think...?

Base: All motorists aged 18 or over 2008 (1,219), 2009 (1,229), Feb 2011 (1,369), Nov 2011 (1,176), Jul'13 (1,160), Jul'15 (729)

\*Sig diff 2013-2015  
Sig. tested at 95%

The proportion of young motorists who know someone who drives after taking class A drugs has remained stable while the number saying they know someone who drives after smoking cannabis has increased since 2013

% Know anyone  
(17-34 year old  
motorists):



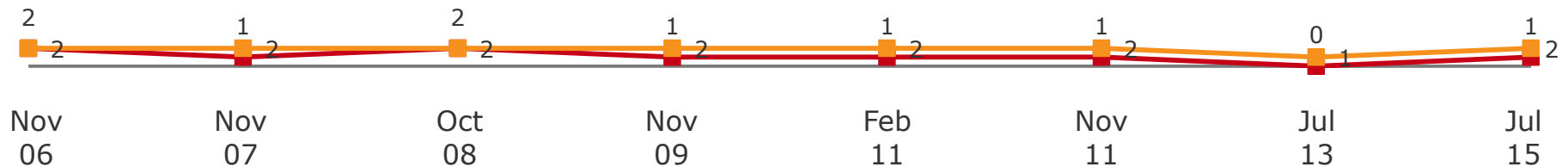
Q16. Thinking about people you know who drive, how many of them do you think...?  
Base: 17-34 year old motorists Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

\*Sig diff 2013-2015  
Sig. tested at 95%

Only a handful of motorists report driving after using Class A drugs or cannabis and this has not changed over time.

### % who engage at all in drug driving behaviours

■ Drive after taking Class A drugs ■ Drive after smoking cannabis



\*Sig diff 2013-2015  
Sig. tested at 95%

Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'

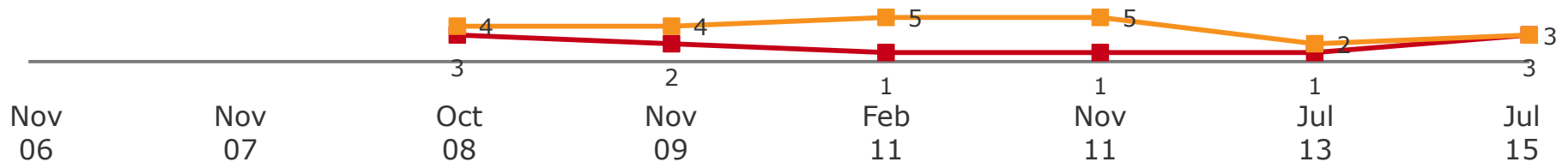
Base: All motorists Jun '05 (1,517) / All motorists aged 18+ Nov '06 (1,462), Nov '07 (1,258), Oct '08 (1,219), Nov '09 (1,229), Feb '11 (1,369), Nov '11 (1,176), Jul '13 (1,160), Jul '15 (729)



Only a handful of motorists report driving after using Class A drugs or cannabis and this has not changed over time.

% of 17-34 year old motorists who engage at all in drug driving behaviours

■ Drive after taking Class A drugs ■ Drive after smoking cannabis



\*Sig diff 2013-2015  
Sig. tested at 95%

Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'  
Base: Oct '08 (285), Nov '09 (290), Feb '11 (270), Nov '11 (261), Jul '13 (249), July'15 (277)

# 4.3

## Speed

# Speed

The numbers agreeing that speeding is dangerous has remained stable although the numbers of 17-29 year old motorists who agree that driving at 40mph in a 30mph area is dangerous has declined since 2013.

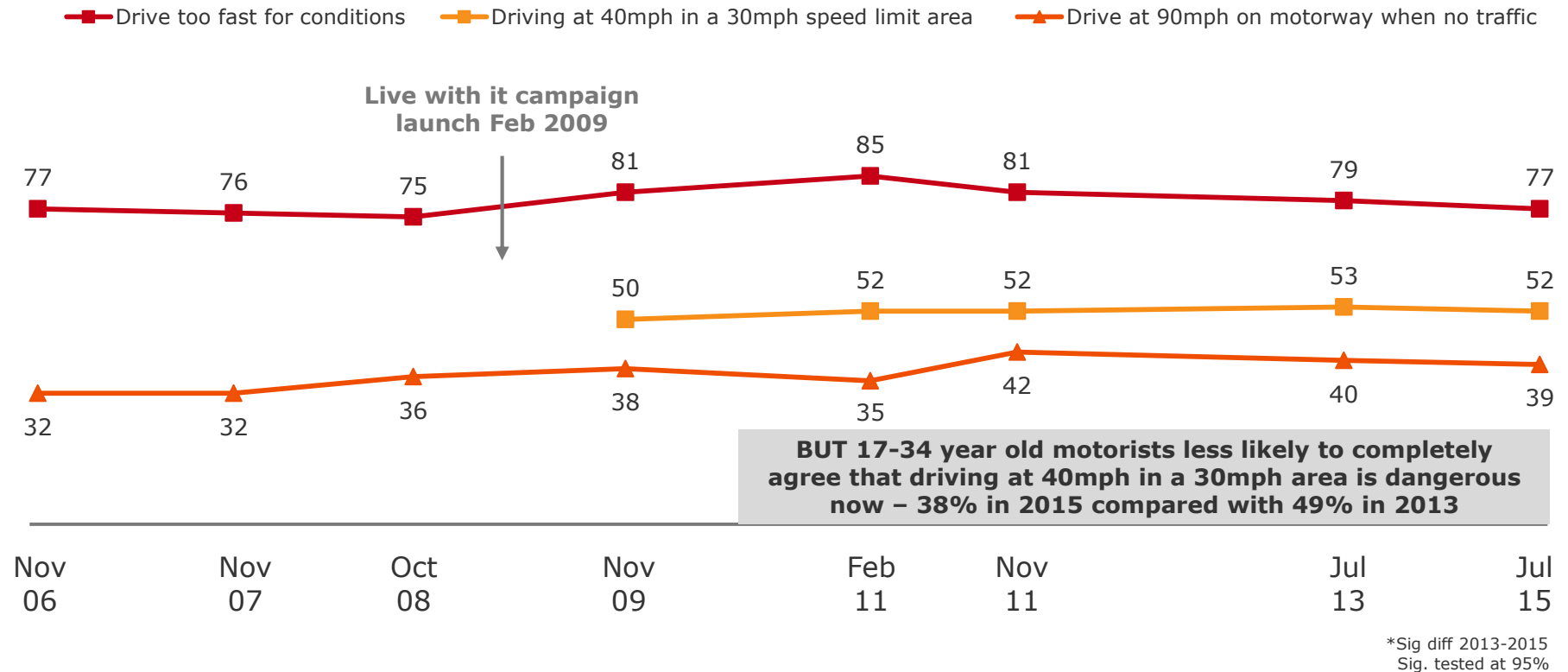
The level of unacceptability of speeding has remained flat over the last 2 years but there's been a long term increase in unacceptability for driving at 40mph in a 30mph area.

The proportion of those who speed has stayed level since 2013, however there have been significant decreases in those who know someone who drives at 40 in a 30 zone, at 90 when there is no traffic, or too fast for the conditions.



Agreement that speeding is dangerous has remained flat over the last few years, although there has been a long term steady increase in agreement that driving at 90mph on a motorway with no traffic is dangerous

% of all respondents agreeing completely that speeding behaviours are dangerous



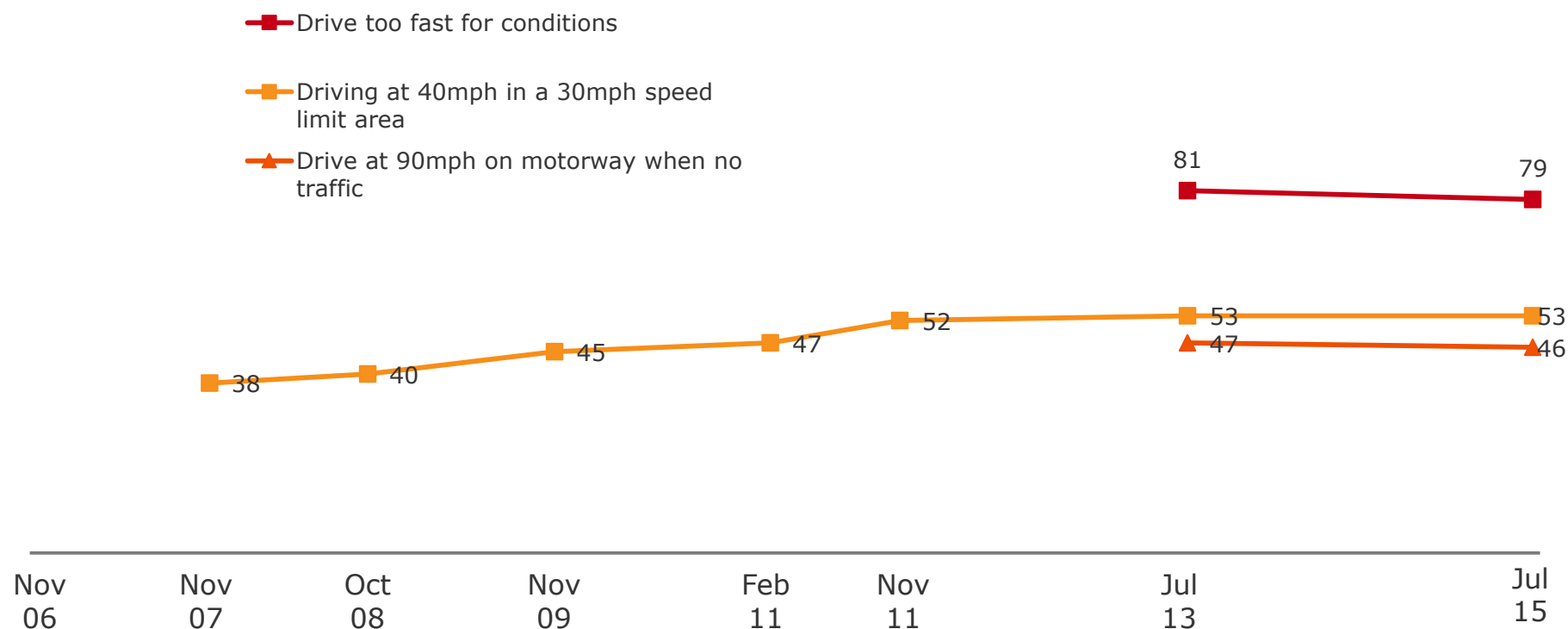
Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul'13 (1,853), Jul'15 (1,090)

17-34 year old motorists Jul '13 (249), July'15 (277)

Since 2013 there have been no changes in unacceptability but encouragingly there has been a steady increase since 2007 that driving at 40mph in a 30mph area is extremely unacceptable

% of all respondents agreeing completely that speeding behaviours are extremely unacceptable

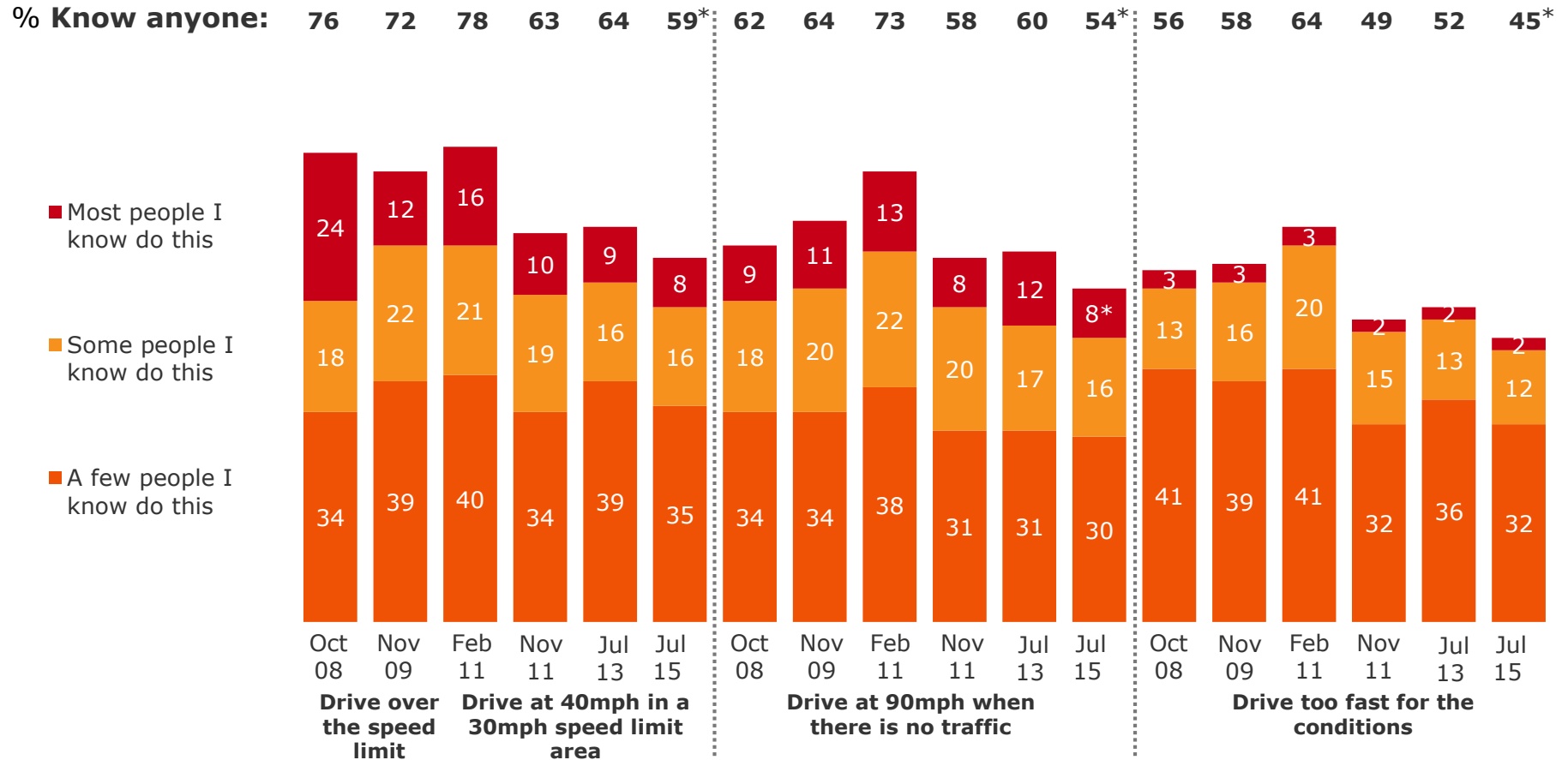


\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July '13 (1,853), July '15 (1090)

# The number of people who know people who exceed the speed limit is declining



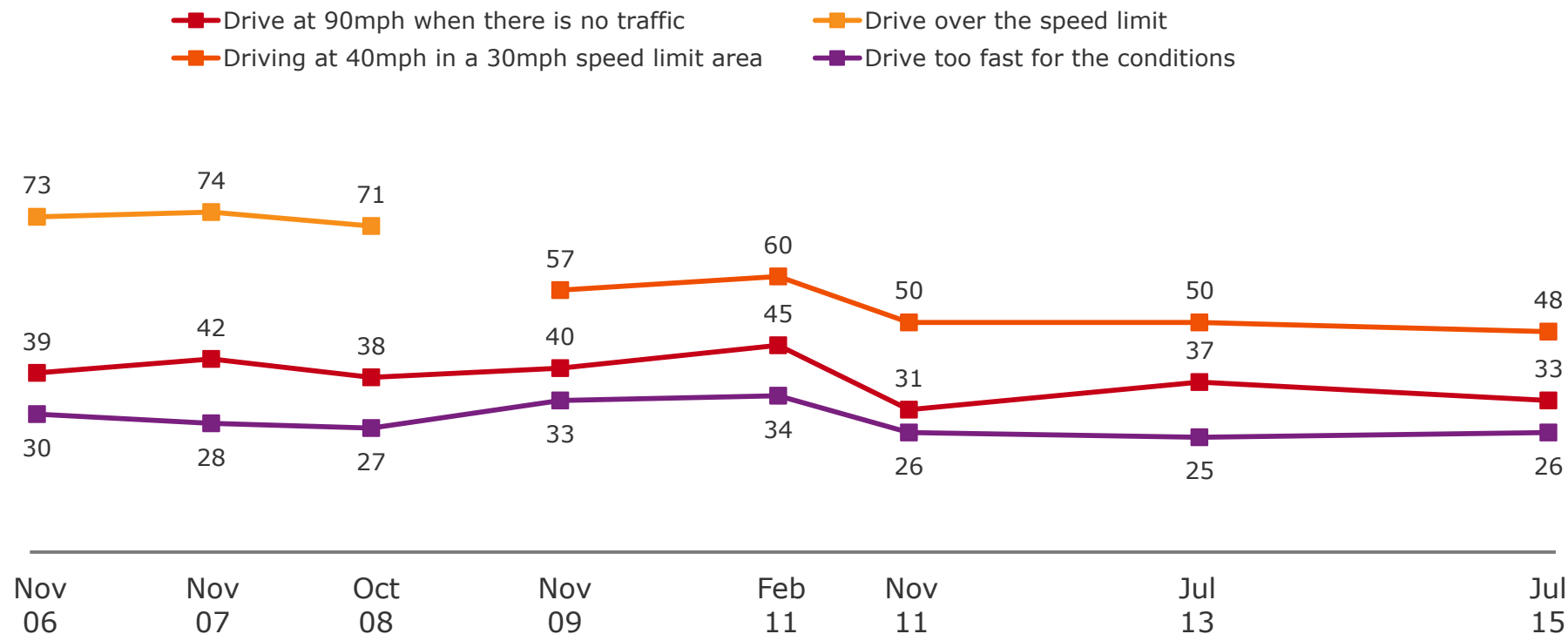
Q16. Thinking about people you know who drive, how many of them do you think...?

Base: All motorists aged 18 or over 2008 (1,219), 2009 (1,229), Feb 2011 (1,369), Nov 2011 (1,184), Jul'13 (1,160) , Jul'15 (729)

\*Sig diff 2013-2015  
Sig. tested at 95%

# The proportion admitting to speeding has remained flat in the short term but is declining in the long term

## % who engage at all in speeding behaviours



\*Sig diff 2013-2015  
Sig. tested at 95%

Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'

Base: All motorists Jun 05 (1,517) / All motorists aged 18+ Nov '06 (1,462), Nov '07 (1,258), Oct '08 (1,219), Nov '09 (1,229), Feb '11 (1,369), Nov '11 (1,184), Jul'13 (1,160), , Jul'15(729)

# 4.4

## Seat belts



# Seat belts

Agreement that not using a seatbelt in the back of the car is dangerous and unacceptable has decreased, driven by 17-34s.

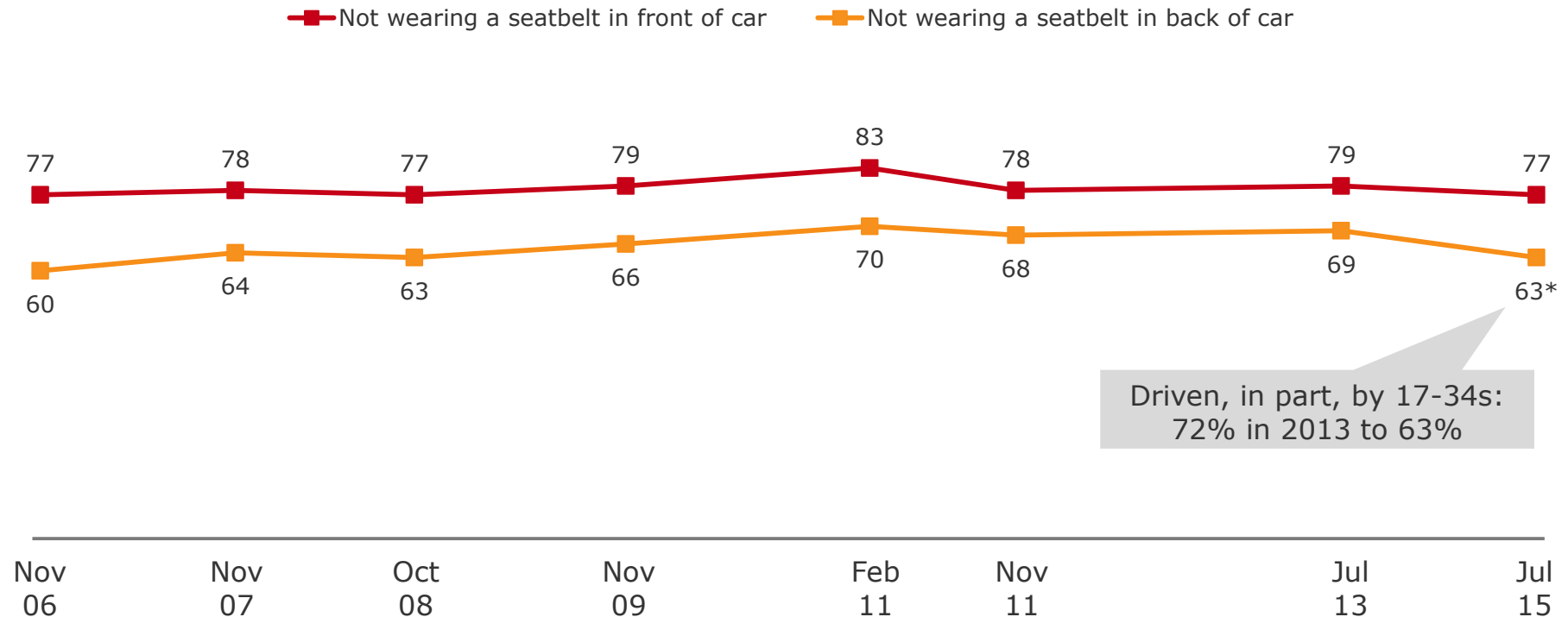
However, the proportion who know someone who does this has decreased both in the short term and long term.

The numbers who say they do not wear seatbelts has seen no change since 2013 but has reduced in the long term.



# Agreement that not wearing a seatbelt in the back of the car is dangerous has fallen in the last 2 years, while the front of the car has remained flat

% of all respondents agreeing completely that not wearing a seatbelt is dangerous



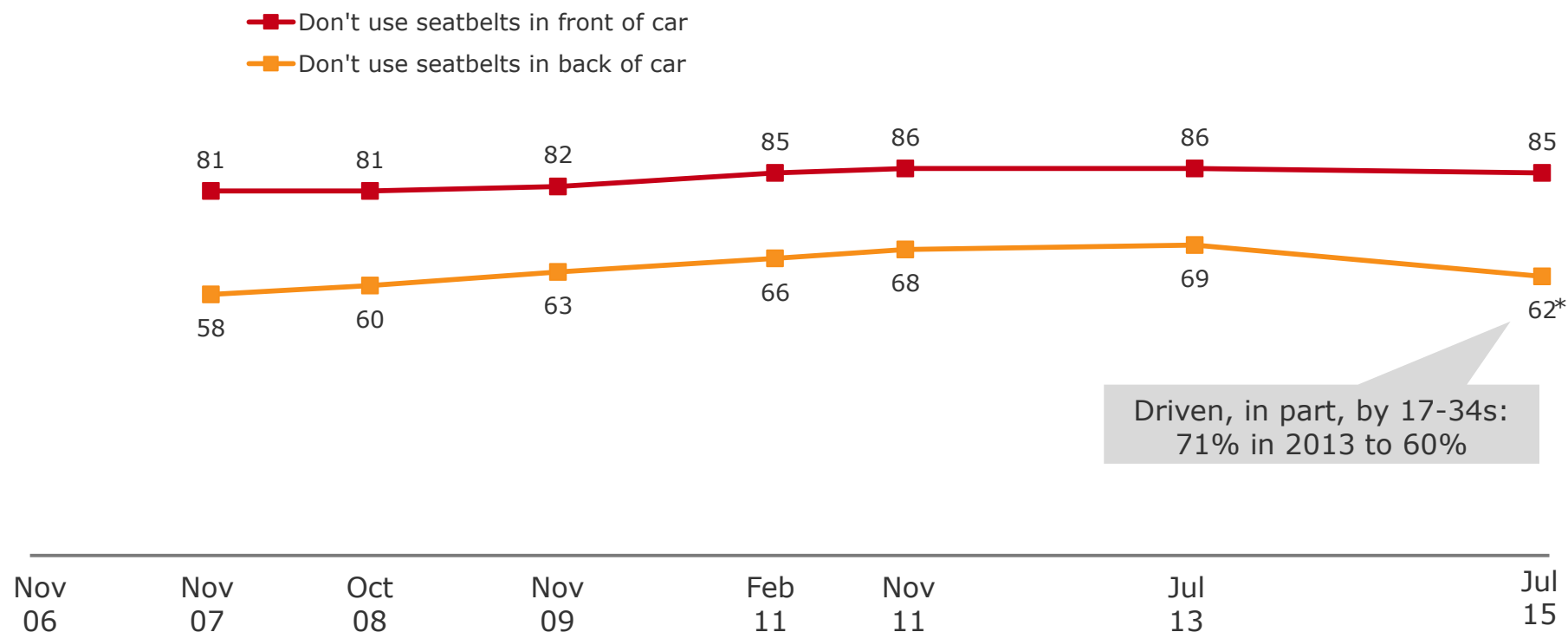
\*Sig diff 2013-2015  
Sig. tested at 95%

Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul'13 (1,853), Jul'15 (1090)  
17-34s July'13 (481), July'15 (270)

Agreement that not wearing a seatbelt in the back is extremely unacceptable has declined since 2013, while the front of the car has remained stable

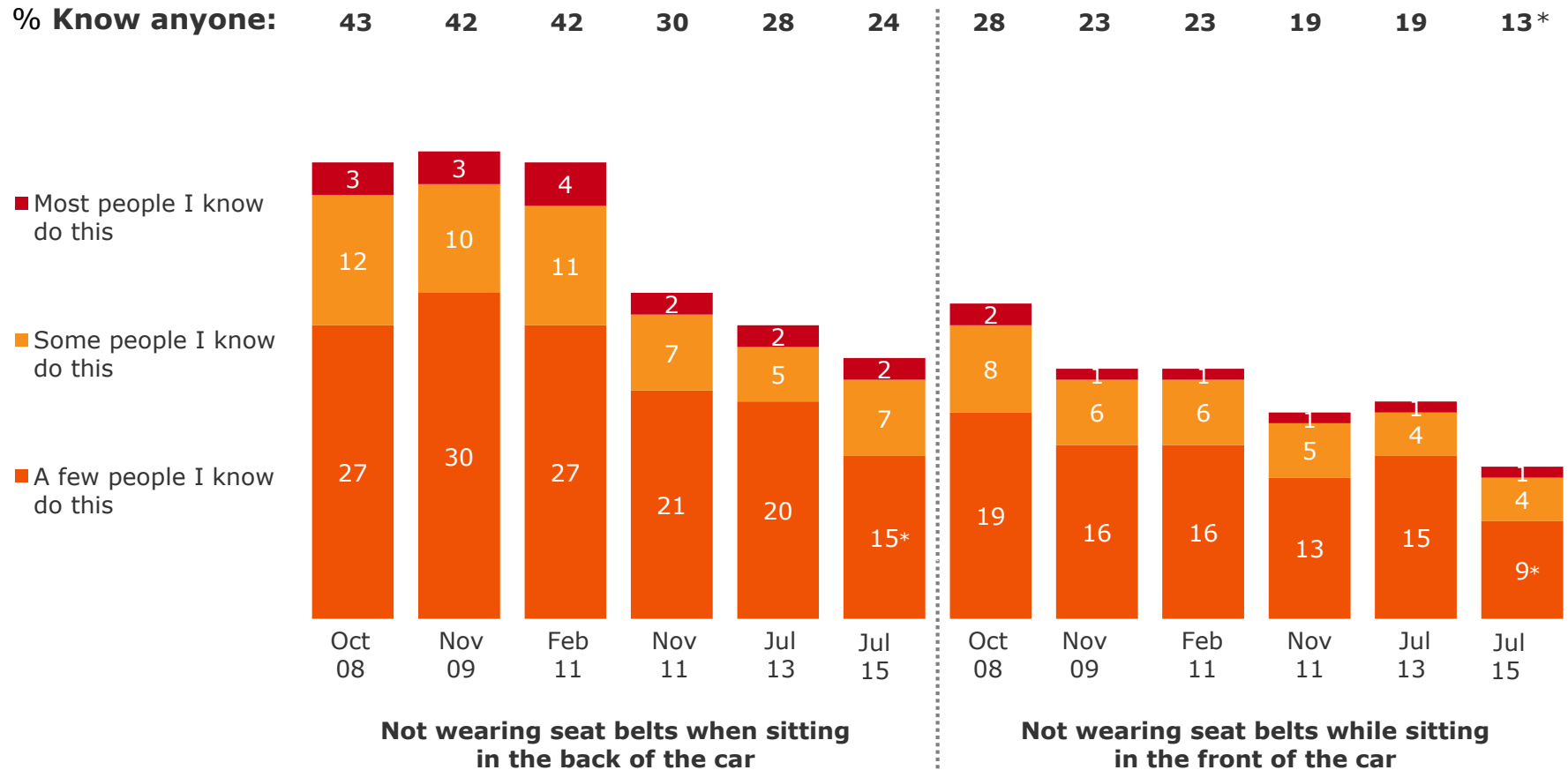
% of all respondents agreeing that not wearing seatbelts is extremely unacceptable



\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').  
Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July'13 (1,853), July'15 (1090)  
17-34s July'13 (481), July'15 (270)

# The number of people saying they know people who do not wear seatbelts is falling



Q16. Thinking about people you know who drive, how many of them do you think...?

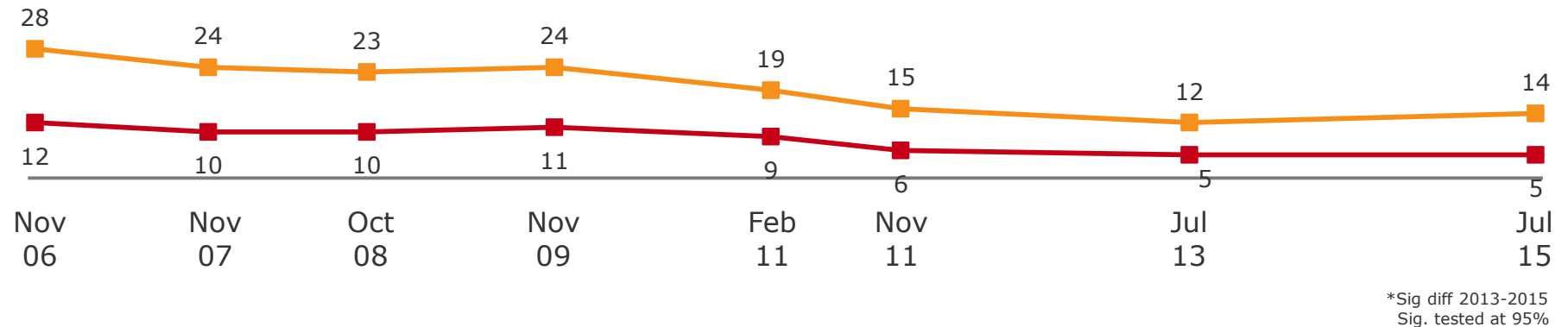
Base: All motorists aged 18 or over 2008 (1,219), 2009 (1,229), Feb 2011 (1,369), Nov 2011 (1,176), Jul'13 (1,160), Jul'15 (729)

\*Sig diff 2013-2015  
Sig. tested at 95%

# The level of self reported non wearing of seatbelts has declined in the long term but remained stable in the short term

% **at all**

■ Not wearing seatbelts while sitting in the front of the car    ■ Not wearing seatbelts when sitting in the back of the car



Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'

Base: All motorists Jun '05 (1,517), All motorists aged 18+ Nov '06 (1,462), Nov '07 (1,258), Oct '08 (1,219), Nov '09 (1,229), Feb '11 (1,369), Nov '11 (1,176), Jul'13 (1,160), Jul'15 (729)

# 4.5

## Using a mobile phone while driving

# Mobile phones

The majority of people agree that using a mobile when driving to text or to call without hands free is dangerous, stable from 2011. Non-motorists are slightly less likely to agree. Three in ten people believe that using a phone even with hands free is dangerous.

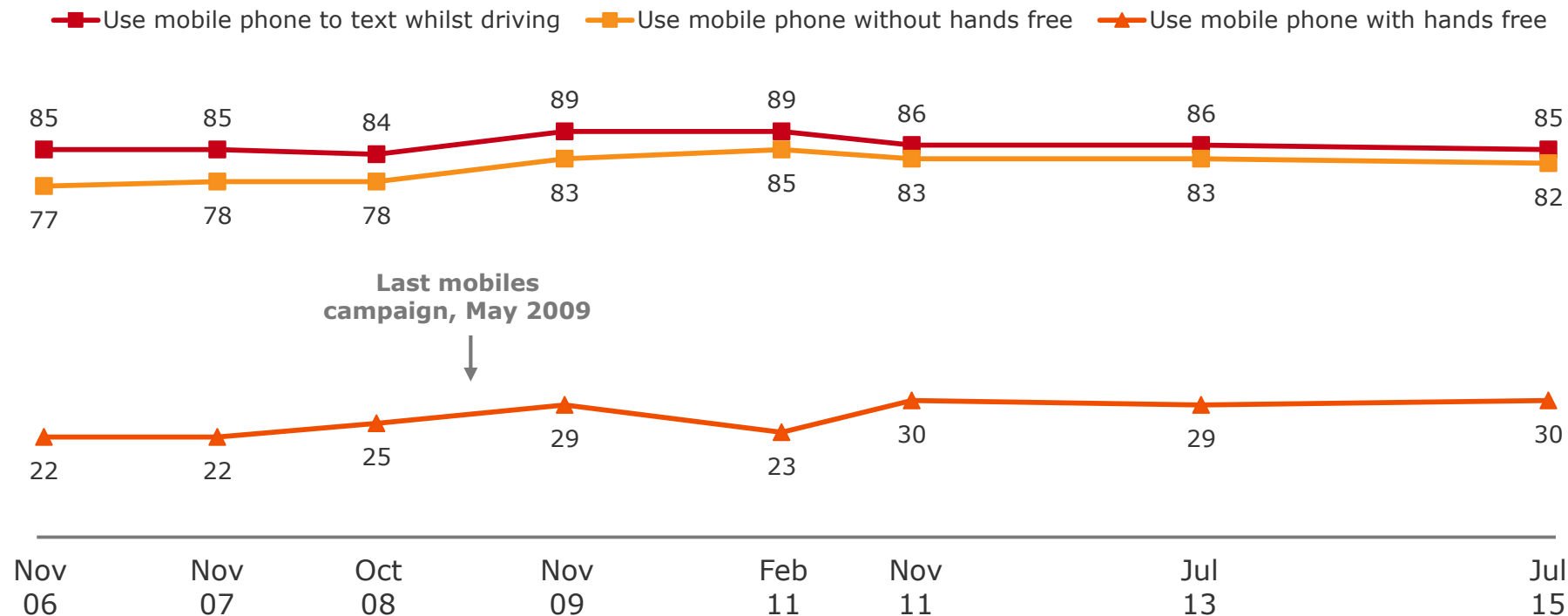
There has been a small decrease in the unacceptability of using a mobile when driving without hands free, although the vast majority still find it unacceptable.

The proportion of those using their mobile hands free when driving has increased to one in three, with the greatest increases for women and older drivers. The proportion who know someone who uses a mobile without hands free has fallen to one in three. Other uses of mobiles show no change.



Over eight in ten agree that it is dangerous to use a mobile phone to text or without hands free when driving, while three in ten agree that even using hands free is dangerous. This has remained stable from Nov 2011.

% of all respondents agreeing completely that each mobile phone behaviour is dangerous



Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

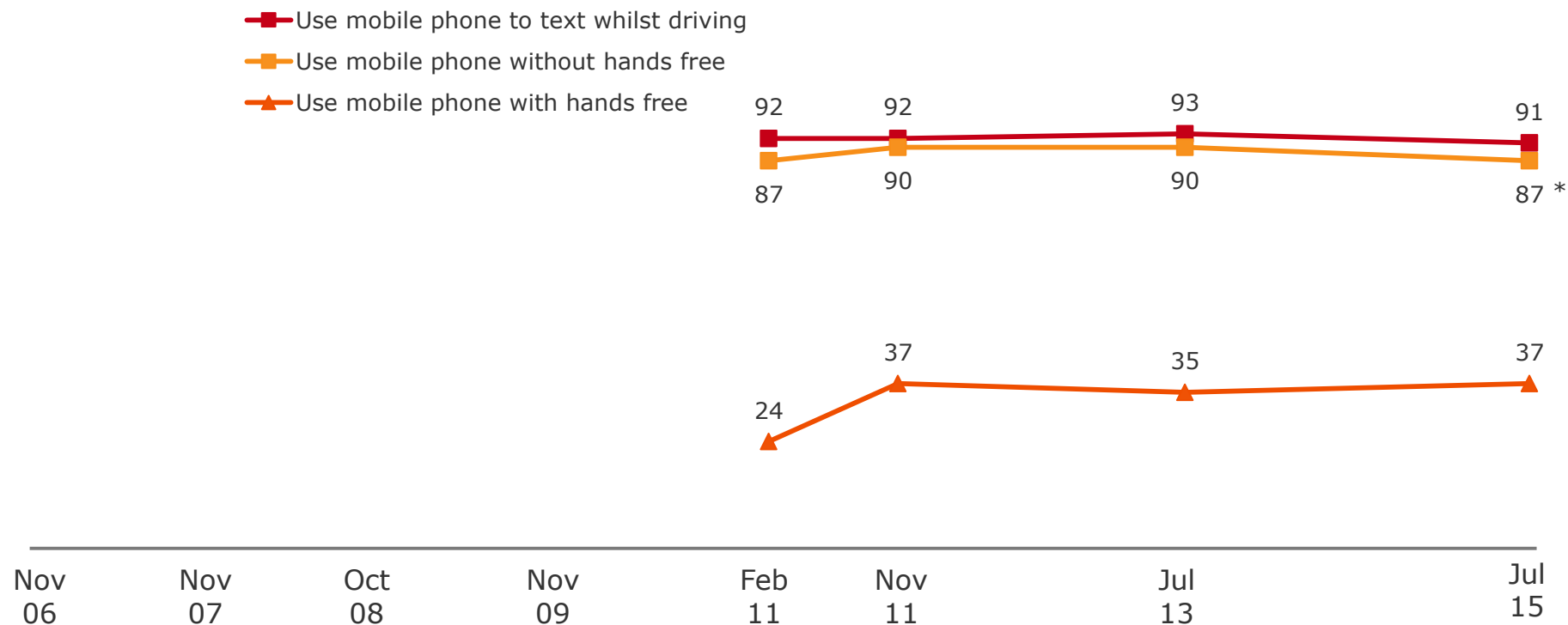
Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul'13 (1,853), Jul'15 (1,090)

\*Sig diff 2013-2015  
Sig. tested at 95%



Almost all agree that texting or not using hands free when driving is extremely unacceptable. Over a third even find using hands free extremely unacceptable.

**% of all respondents agreeing completely each mobile phone behaviour is extremely unacceptable**



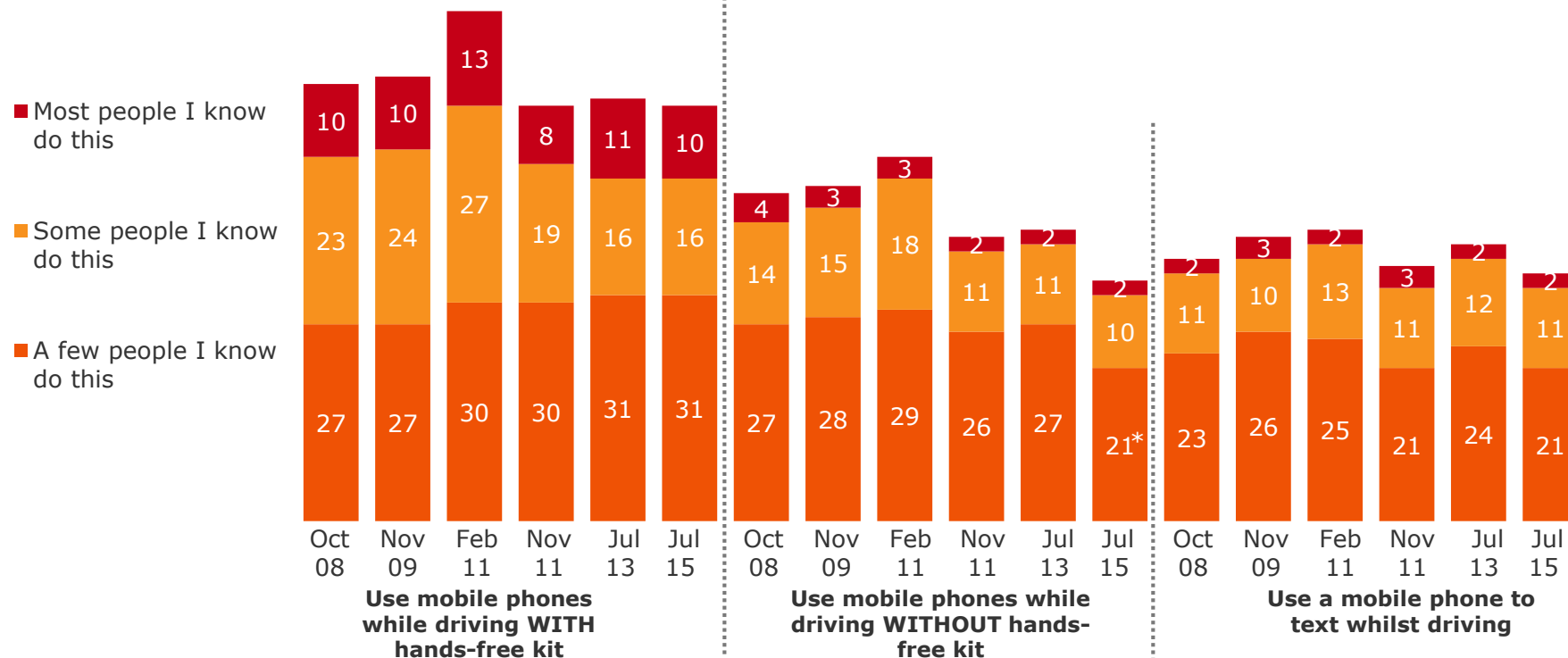
Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul '13 (1,853), Jul '15 (1,090)

\*Sig diff 2013-2015  
Sig. tested at 95%

Fewer motorists say they know someone who uses a mobile without hands free when driving in 2015, (which may reflect changes in phone functionality), with no change for knowing someone who uses hands free or texts when driving.

% Know anyone: 60 62 71 56 58 57 45 46 50 39 39 32\* 36 38 41 35 38 34



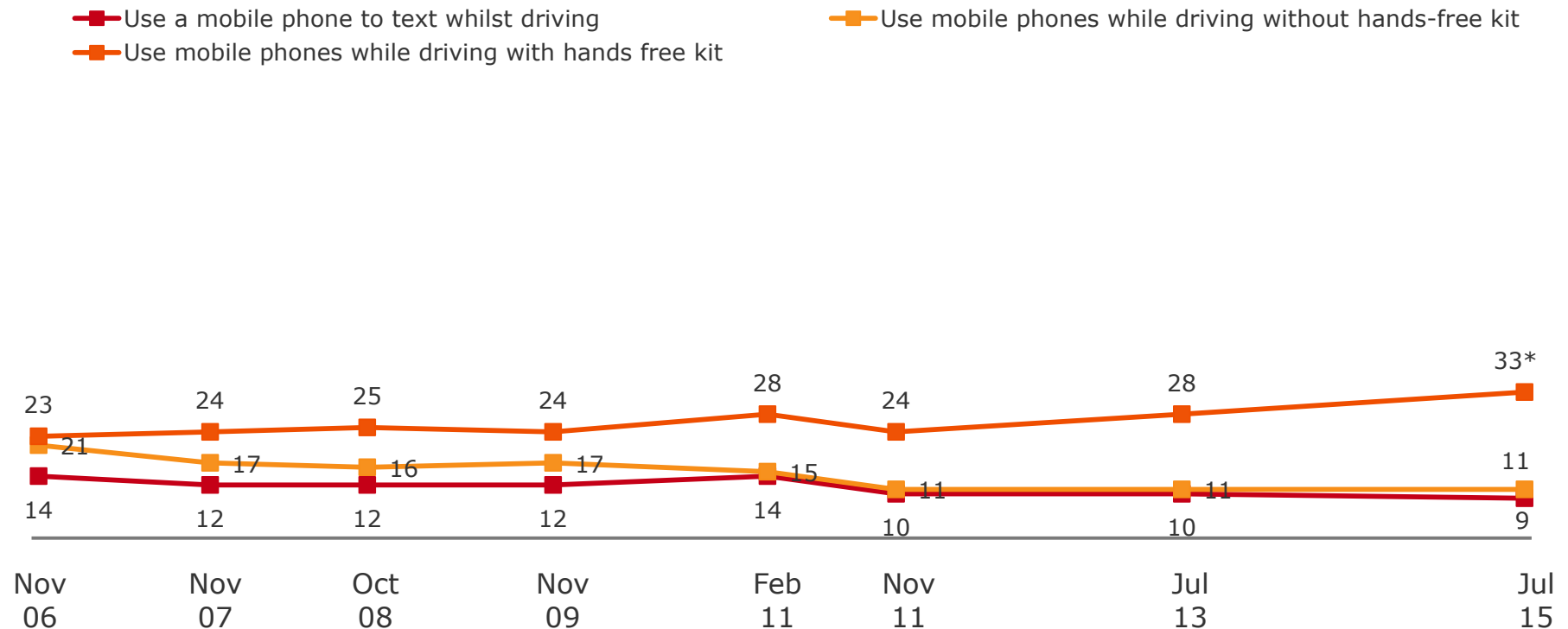
Q16. Thinking about people you know who drive, how many of them do you think...?

Base: All motorists aged 18 or over 2008 (1,219), 2009 (1,229), Feb 2011 (1,369) Nov 2011 (1,176), Jul 2013 (1,160), Jul 2015 (729)

\*Sig diff 2013-2015  
Sig. tested at 95%

There has been an increase in reported use of a mobile phone using hands free while driving, to one in three, but no increase in reported texting or use without hands free (each around one in ten)

% who use a mobile phone in this way at all while driving



Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'

Base: All motorists Jun '05 (1,517), All motorists aged 18+ Nov '06 (1,462), Nov '07 (1,258), Oct '08 (1,219), Nov '09 (1,229), Feb '11 (1,369), Nov '11 (1,176), Jul'13 (1,160), Jul'15 (729)

\*Sig diff 2013-2015  
Sig. tested at 95%

# 4.6

## Driver fatigue

# Driver fatigue

Around two in three completely agree that driving while tired is dangerous and this has not changed in the short or long term.

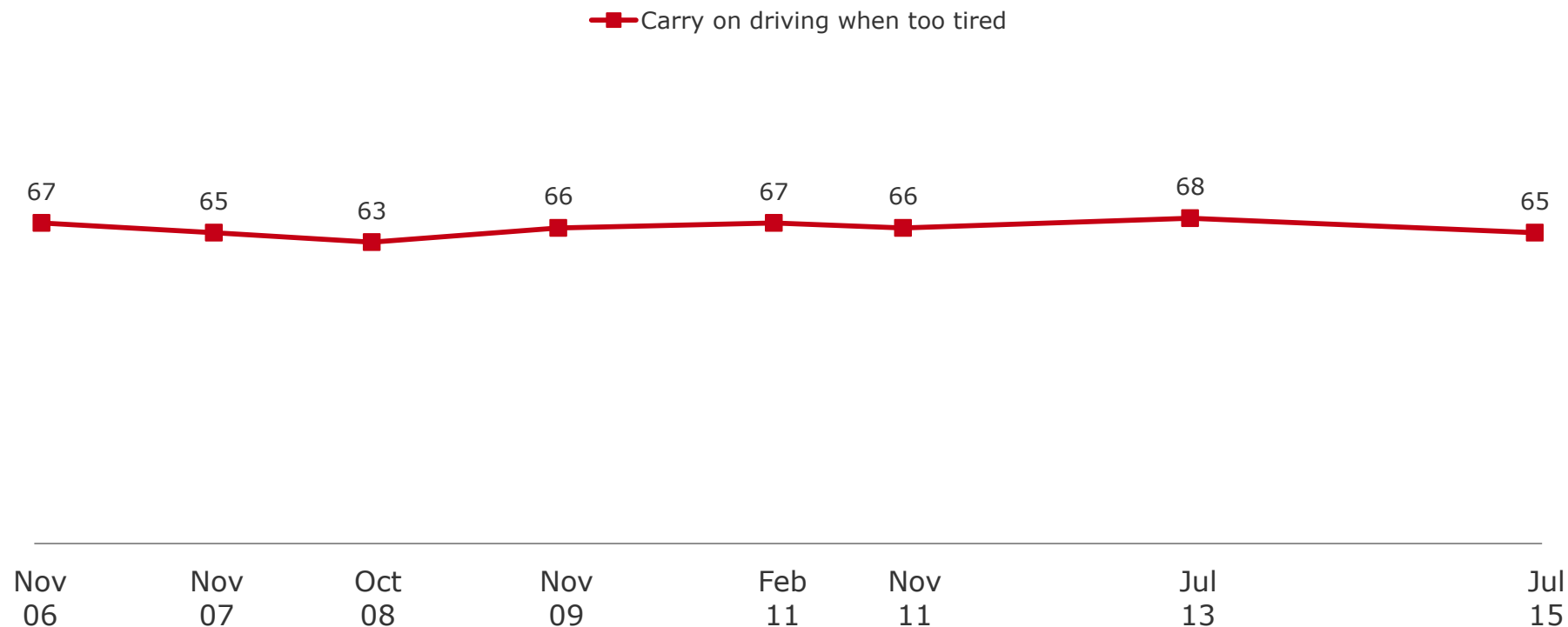
However, while there has been no change since 2013 in the proportion agreeing that it is extremely unacceptable, since 2007 there has been a gradual increase.

There have been no changes in the numbers admitting to driving while tired but there has been a long term decrease in those saying they know someone who does this.



# Around two in three agree completely that driving when too tired is dangerous and this has remained stable over time

% **agree completely**



\*Sig diff 2013-2015  
Sig. tested at 95%

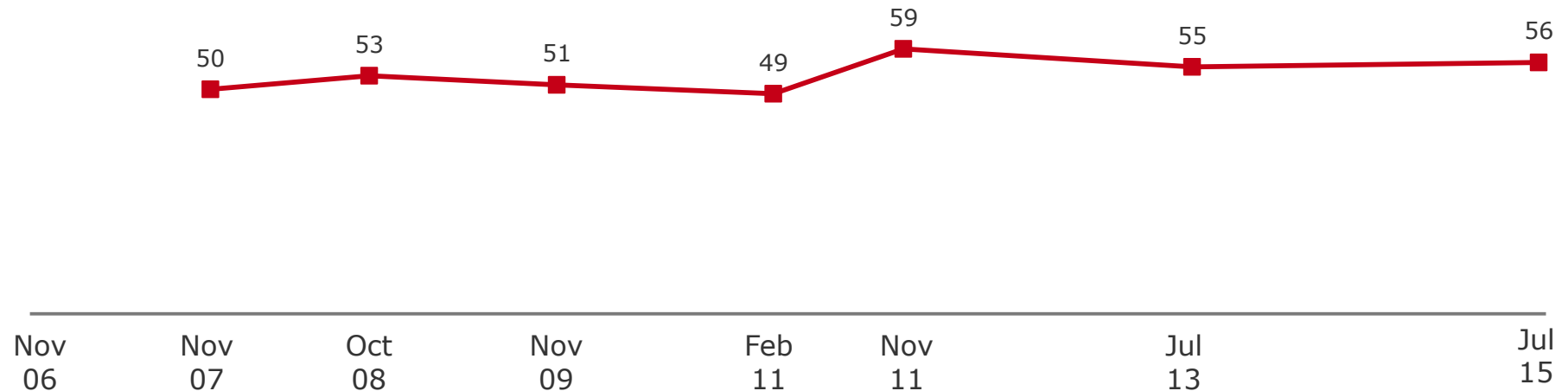
Q8. To what extent would you agree or disagree that the following behaviours are dangerous?

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul'13 (1,853) Jul'15 (1090)

# Since 2007 agreement has increased that driving when too tired is extremely unacceptable

% **extremely unacceptable**

—■ Carry on driving when too tired



\*Sig diff 2013-2015  
Sig. tested at 95%

Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').  
Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), July'13 (1,853), July'15 (1090)

# Those saying they know someone who drives while tired has remained stable since 2013 but is decreasing in the long term

% Know anyone:

48

53

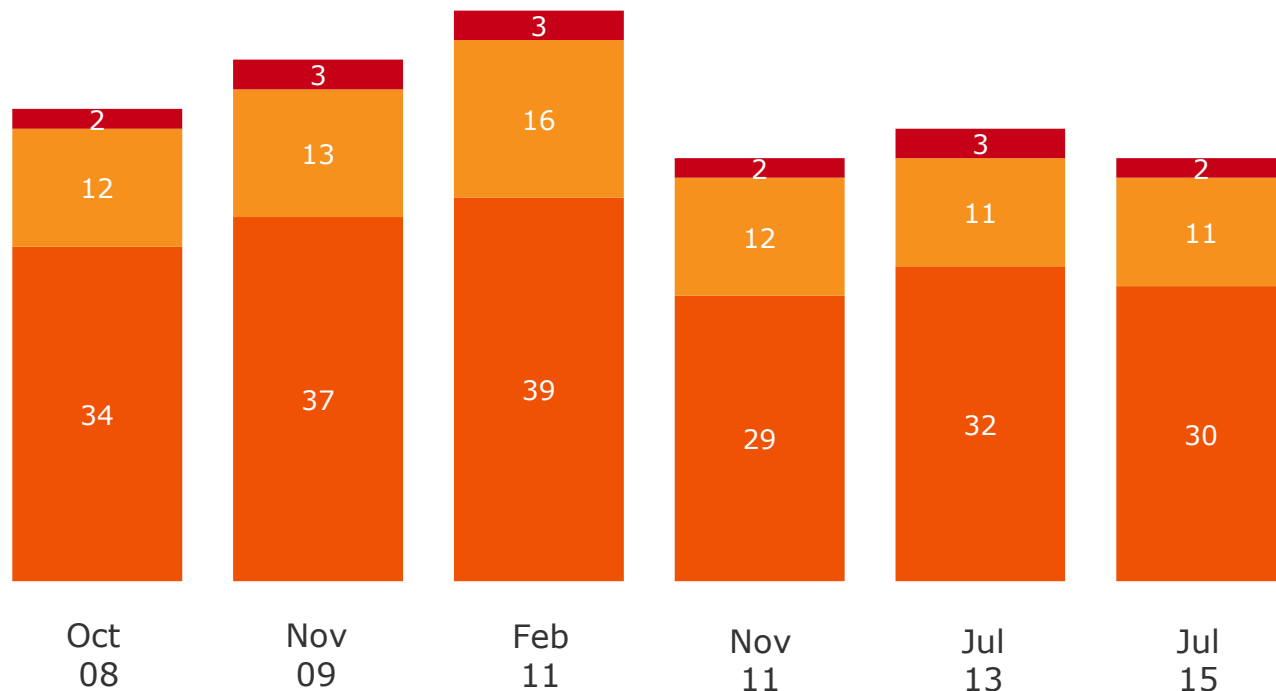
58

43

46

43

- Most people I know do this
- Some people I know do this
- A few people I know do this



Carry on driving when too tired

\*Sig diff 2013-2015  
Sig. tested at 95%

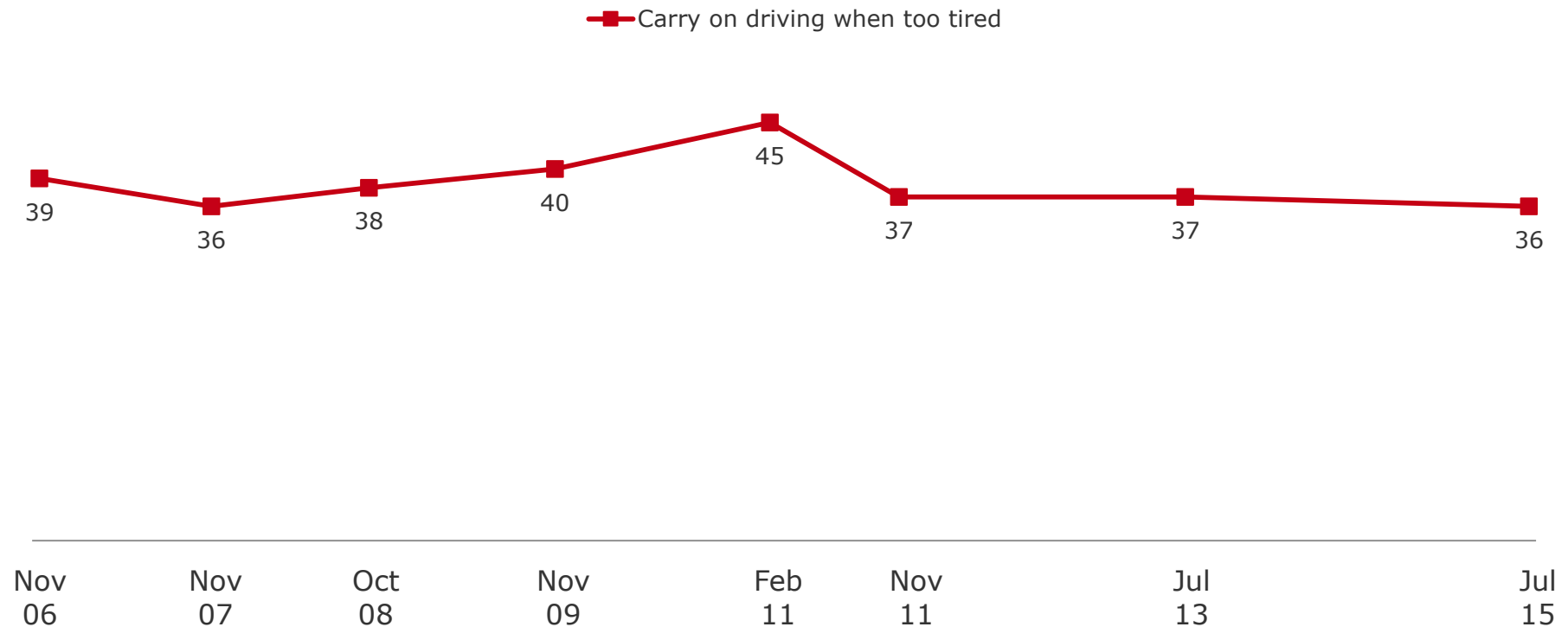
Q16. Thinking about people you know who drive, how many of them do you think...?

Base: All motorists aged 18 or over 2008 (1,219), 2009 (1,229), Feb 2011 (1,369), Nov 2011 (1,176), Jul'13 (1,160), Jul'15 (729)



Approximately one in three admit to driving while tired and this has stayed fairly stable over the last 9 years

% at all



\*Sig diff 2013-2015  
Sig. tested at 95%

Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'

Base: All motorists Jun '05 (1,517),

All motorists aged 18+ Nov '06 (1,462), Nov '07 (1,258), Oct '08 (1,219), Nov '09 (1,229), Feb '11 (1,369), Nov '11 (1,176), Jul'13 (1,160), Jul'15 (729)

# 5

## The THINK! brand

# The THINK! brand

Awareness of road safety advertising continues to decrease, but the proportion saying this was THINK! Advertising continues to increase from 2011, particularly for motorists.

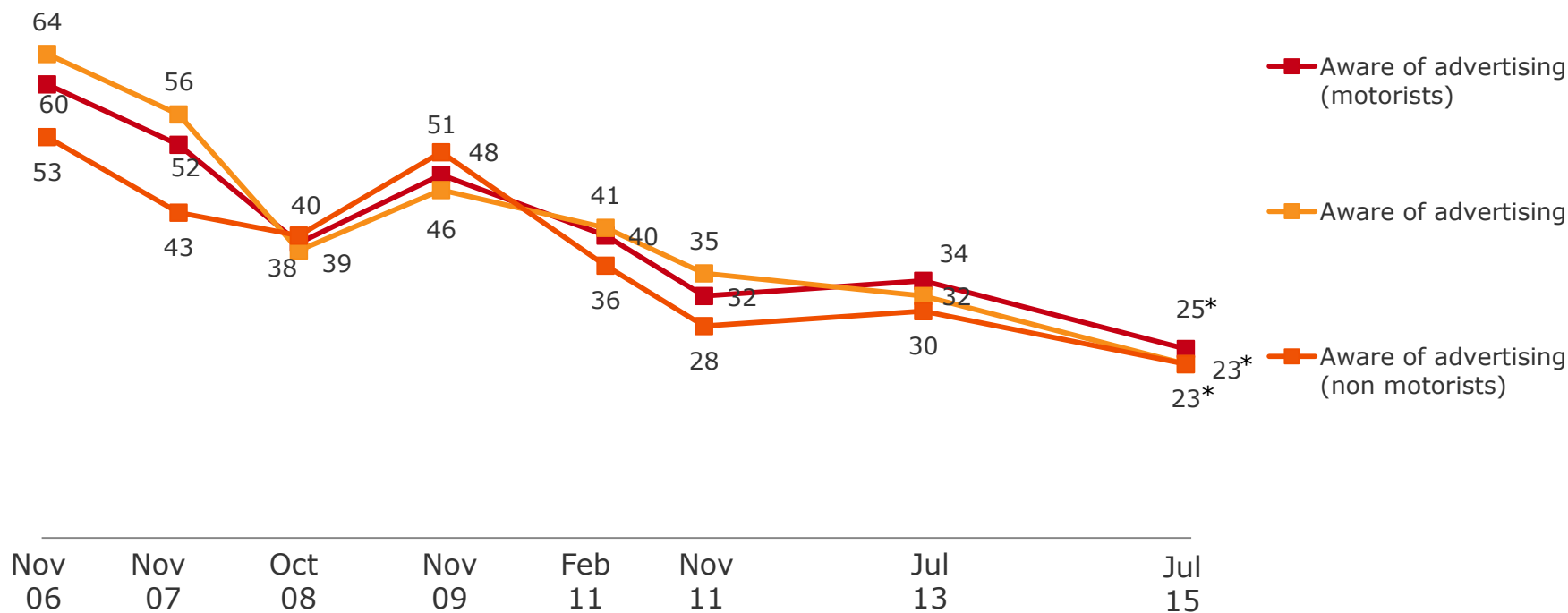
Recognition of the logo has decreased to three in four, with a slower decrease for motorists.

The THINK! brand continues to be perceived in largely positive terms, but levels of trust, and belief that the ads make a difference to road safety have decreased slightly, particularly for those aged 30-44. Motorists in particular are less likely to agree that THINK! makes a real difference.



# Spontaneous awareness of road safety advertising has continued to decline to around one in four people, including motorists

## % aware of road safety advertising



Q19. Can I just check, have you seen or heard any advertising about road safety recently?

Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009) Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul '13 (1,853), Jul '15 (1,090) /

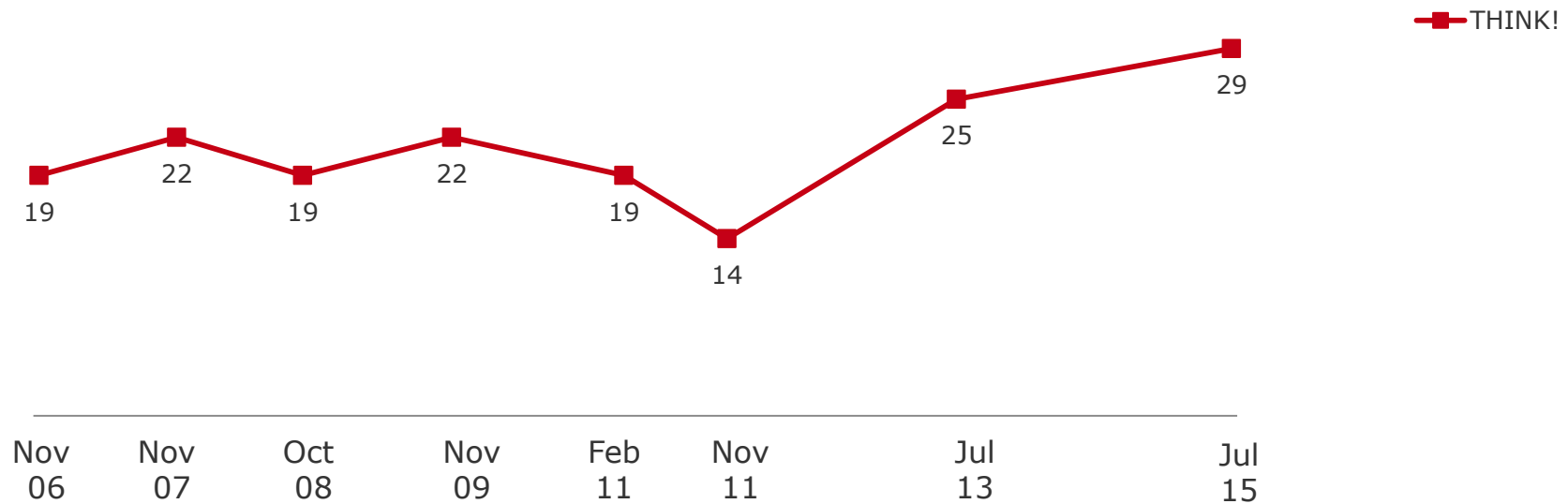
All motorists Nov '06 (1,489), Nov '07 (1,274), Oct '08 (1,227) Nov '09 (1,233), Feb '11 (1,371), Nov '11 (1,184), Jul '13 (1,162), Jul '15 (729) /

All non motorists Nov '06 (770), Nov '07 (745), Oct '08 (782) Nov '09 (777), Feb '11 (632), Nov '11 (823), Jul '13 (691), Jul '15 (361)

\*Sig diff 2013-2015  
Sig. tested at 95%

While the proportion citing THINK! has not increased from 2013, the increasing pattern has continued, reaching three in ten

% citing THINK! as source of awareness



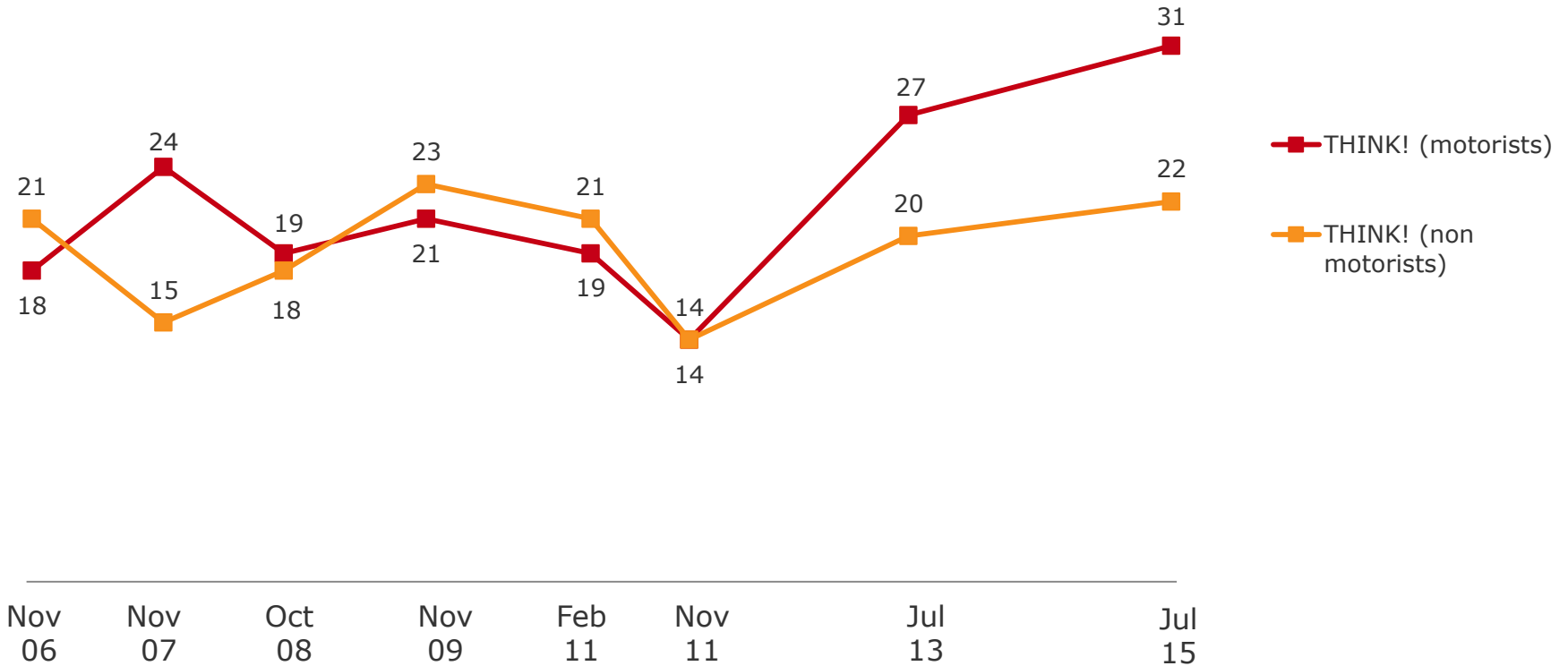
Q20. Who produced this advertising?

Base: All aware of road safety advertising Nov '06 (1,356), Nov '07 (1,009), Oct '08 (745), Jul '13 (568)  
Nov '09 (939), Feb '11 (766), Nov '11 (611), Jul '13 (568), Jul '15 (275)

\*Sig diff 2013-2015  
Sig. tested at 95%

# THINK! is increasingly cited by both motorists and non-motorists but the increase is faster among motorists

## % citing THINK! as source of awareness



Q20. Who produced this advertising? Base: All aware of road safety advertising – Motorists

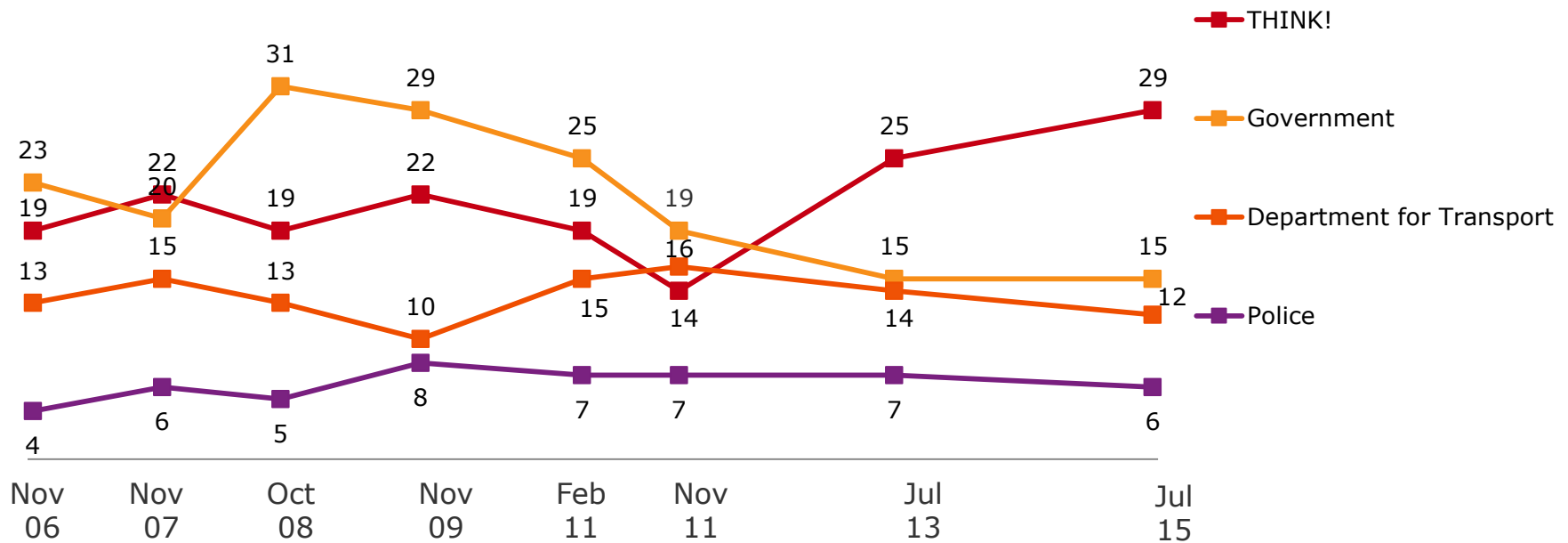
Nov '06 (955), Nov '07 (702), Oct '08 (454) Nov '09 (565) , Feb '11 (557) , Nov '11 (397), Jul '13 (375), Jul '15 (201)/

Non motorists Nov '06 (401), Nov '07 (307), Oct '08 (291) Nov '09 (374) , Feb '11 (209), Nov '11 (214), Jul '13 (193), Jul '15 (74)

\*Sig diff 2013-2015  
Sig. tested at 95%

There were no changes in the other key sources of awareness cited, with THINK! twice as likely to be cited as the Government or Department for Transport

% citing each source of awareness



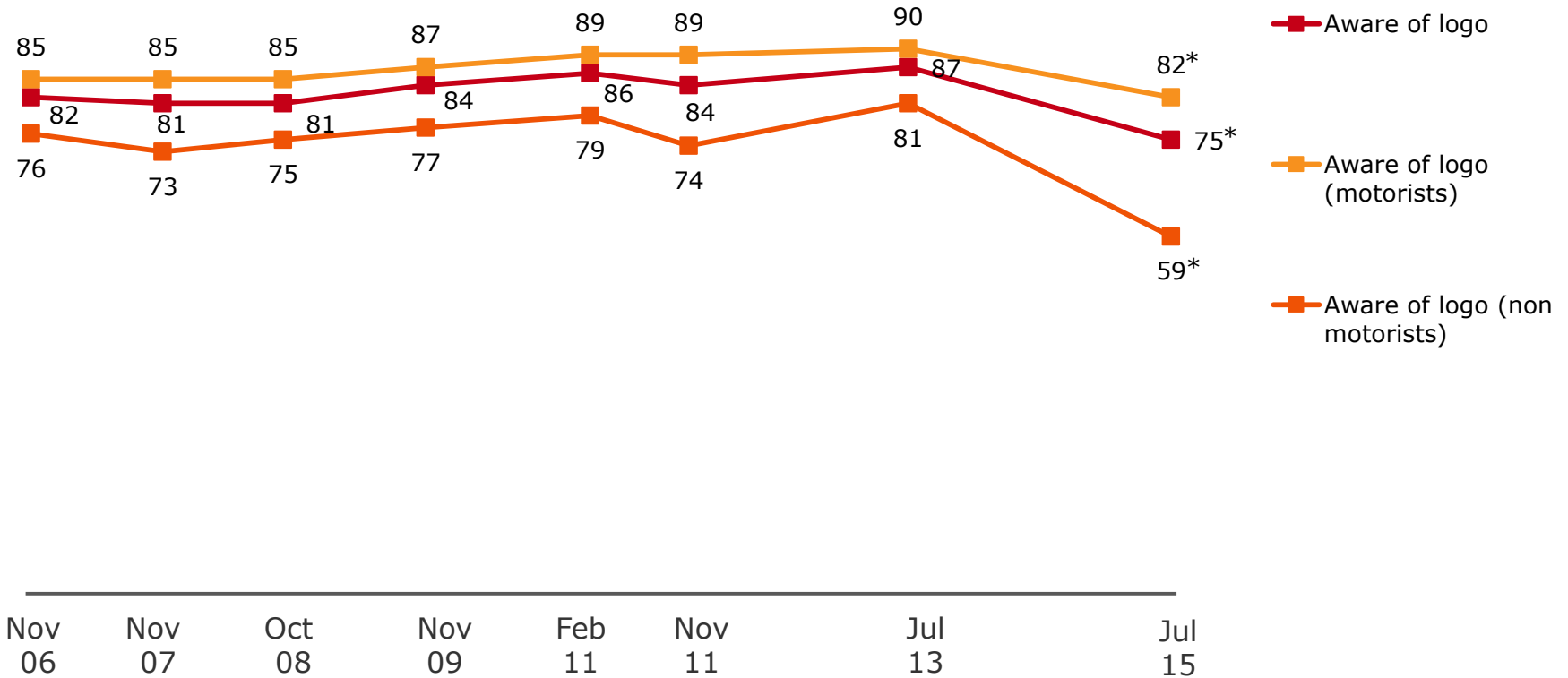
Q20. Who produced this advertising?

Base: All aware of road safety advertising Nov '06 (1,356), Nov '07 (1,009), Oct '08 (745), Nov '09 (939), Feb '11 (766), Nov '11 (611), Jul '13 (568), Jul '15 (275)

\*Sig diff 2013-2015  
Sig. tested at 95%

# Awareness of the THINK! Logo has decreased to three in four, with a slower decrease for motorists

% recognising the THINK! logo



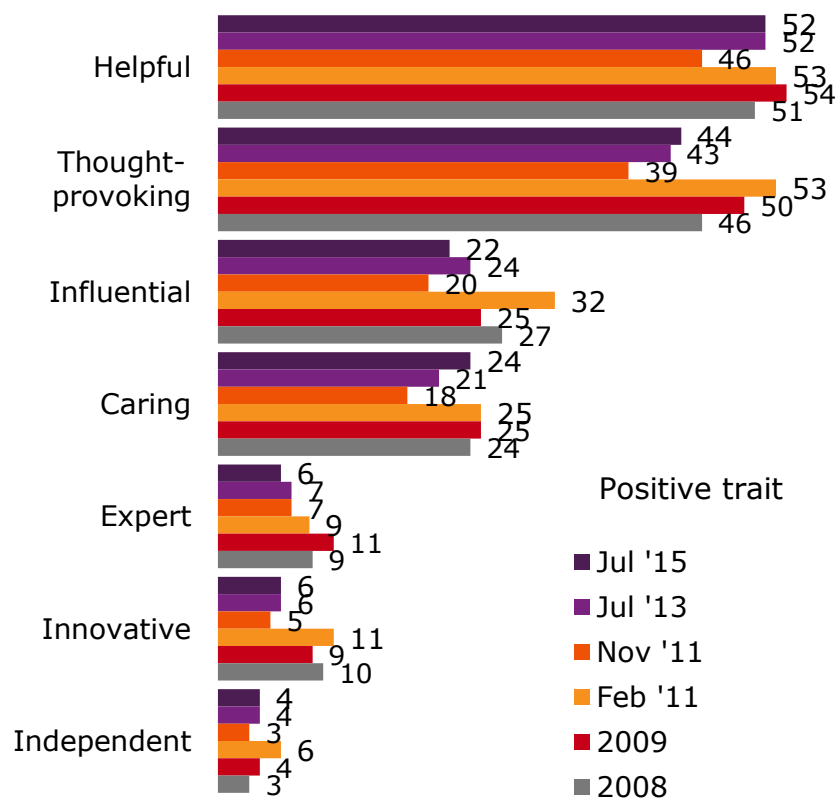
Q21. Have you seen this logo before? Base: All respondents Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009) Nov '09 (2,010), Feb '11 (2,003), Jul '13 (1,853), Jul '15 (1,090) / All motorists Nov '06 (1,489), Nov '07 (1,274), Oct '08 (1,227) Nov '09 (1,233), Feb '11 (1,371), Nov '11 (1,184), Jul '13 (1,162), Jul '15 (729) / All non motorists Nov '06 (770), Nov '07 (745), Oct '08 (782) Nov '09 (777), Feb '11 (632), Nov '11 (823), Jul '13 (691), Jul '15 (361)

\*Sig diff 2013-2015  
Sig. tested at 95%



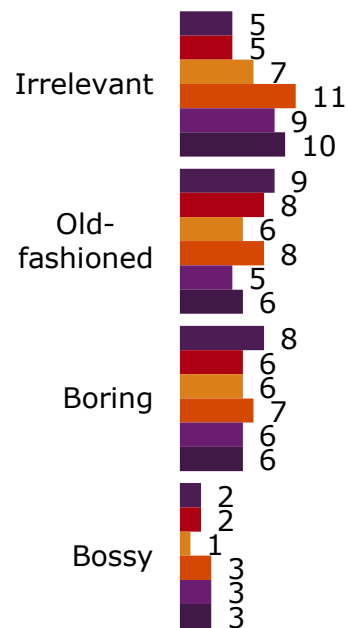
The THINK! brand is most likely to be viewed positively (helpful, thought provoking and influential) and there has been no change since 2013 in the words chosen

% describing THINK! brand as ...



Positive trait

Jul '15  
Jul '13  
Nov '11  
Feb '11  
2009  
2008



Negative trait

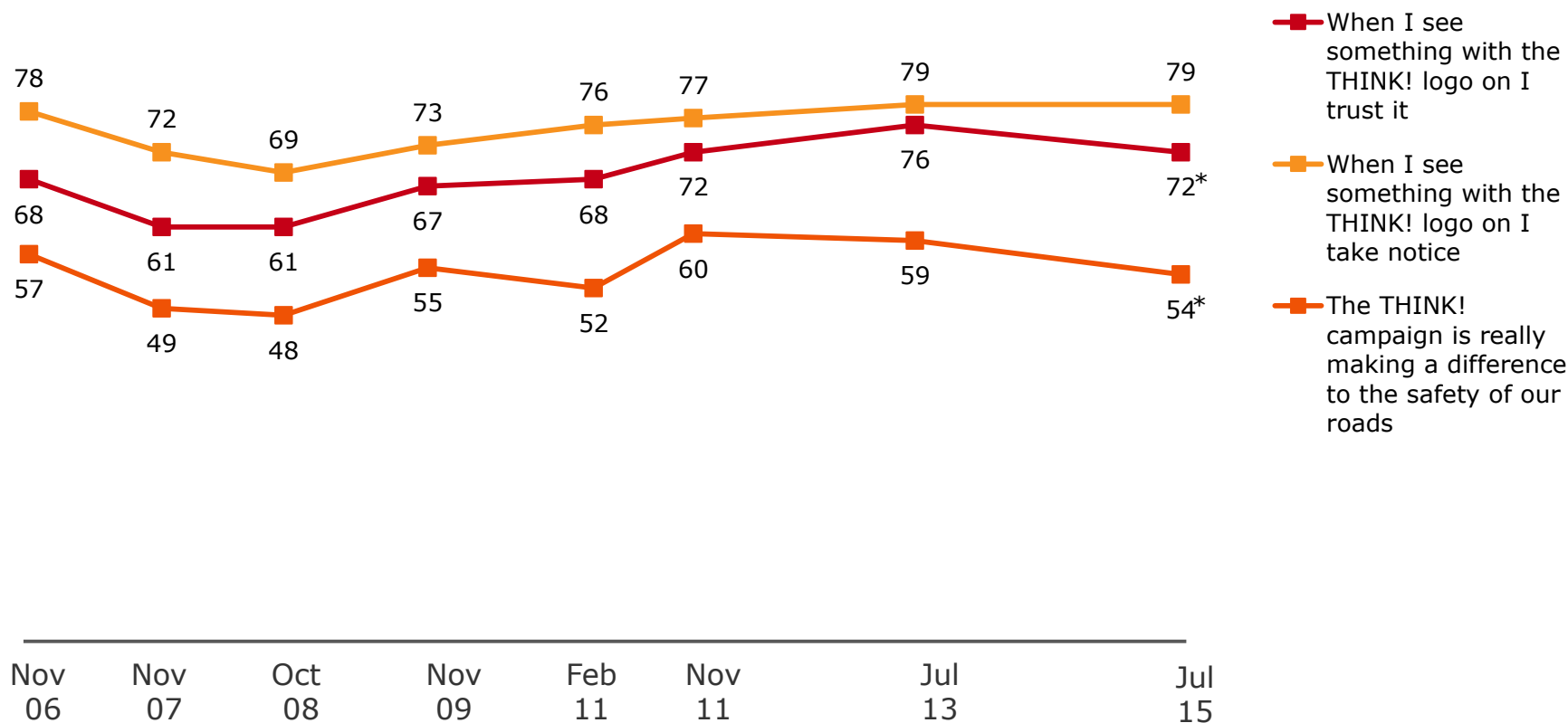
Jul '15  
Jul '13  
Nov '11  
Feb '11  
2009  
2008

Q23. Please could you pick out the words that you feel best describe the THINK! campaign from your point of view.  
Base: All respondents who recognise the THINK! logo Nov '06 (1,853), Nov '07 (1,617), Nov '08 (1,589) Nov '09 (1,655), Feb '11 (1,697), Nov '11 (1,646), Jul '13 (1,568), Jul '15 (822)

\*Sig diff 2013-2015  
Sig. tested at 95%

# Eight in ten continue to take notice of the THINK! branding, but fewer say they trust it (72%) or think it really makes a difference (54%) in 2015

% agree at all with each statement



Q22. To what extent do you agree or disagree with the following statements about the THINK! campaign...

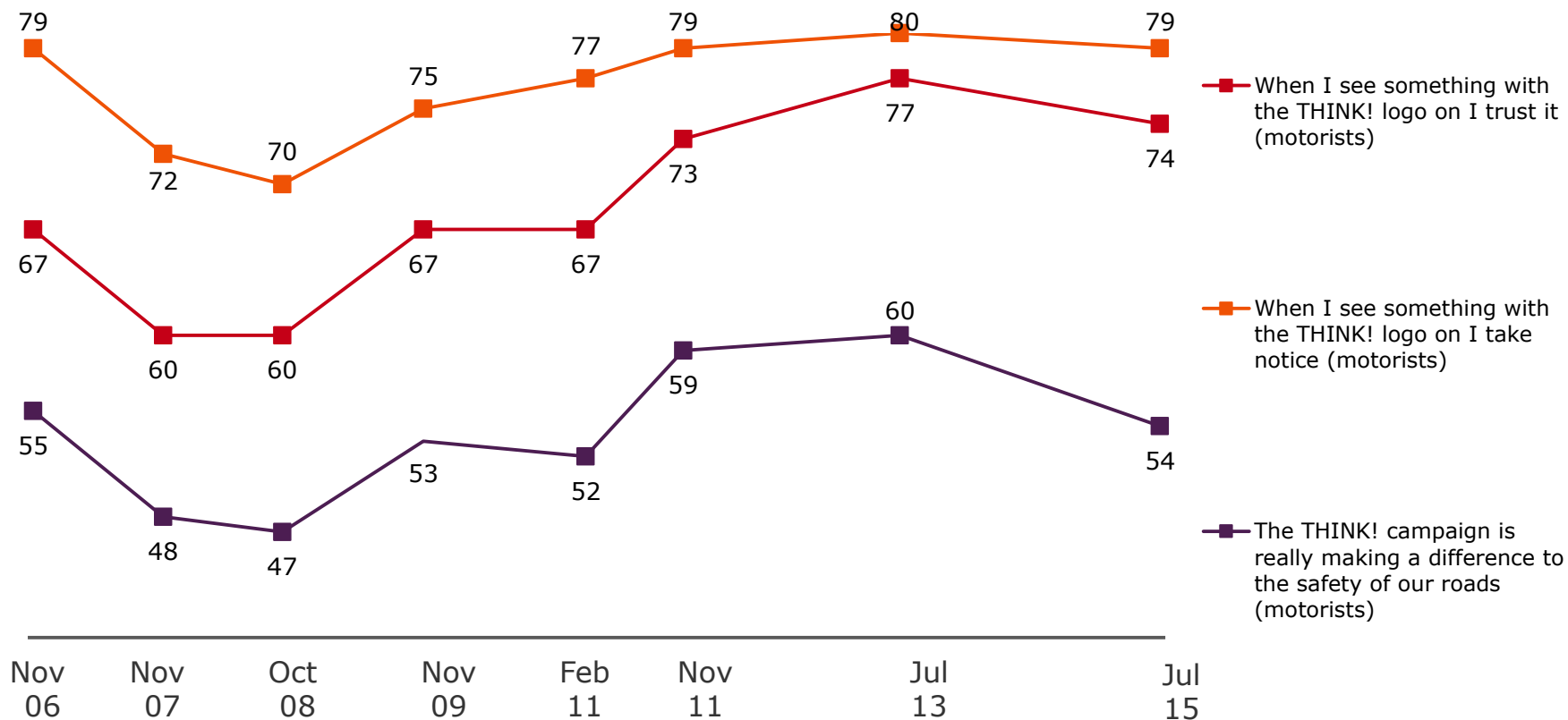
Base: All respondents who recognise the THINK! logo Nov 06 (1,853),

Nov 07 (1,617), Nov 08 (1,589), Nov 09 (1,655), Feb '11 (1,697), Nov '11 (1,646), Jul '13 (1,568), Jul '15 (822)

\*Sig diff 2013-2015  
Sig. tested at 95%

# The decline in agreement that the THINK! campaign makes a difference was driven primarily by motorists

## % agree at all with each statement



Q22. To what extent do you agree or disagree with the following statements about the THINK! campaign...

Base: All who recognise the THINK! logo - Motorists Nov '06 (1,277),

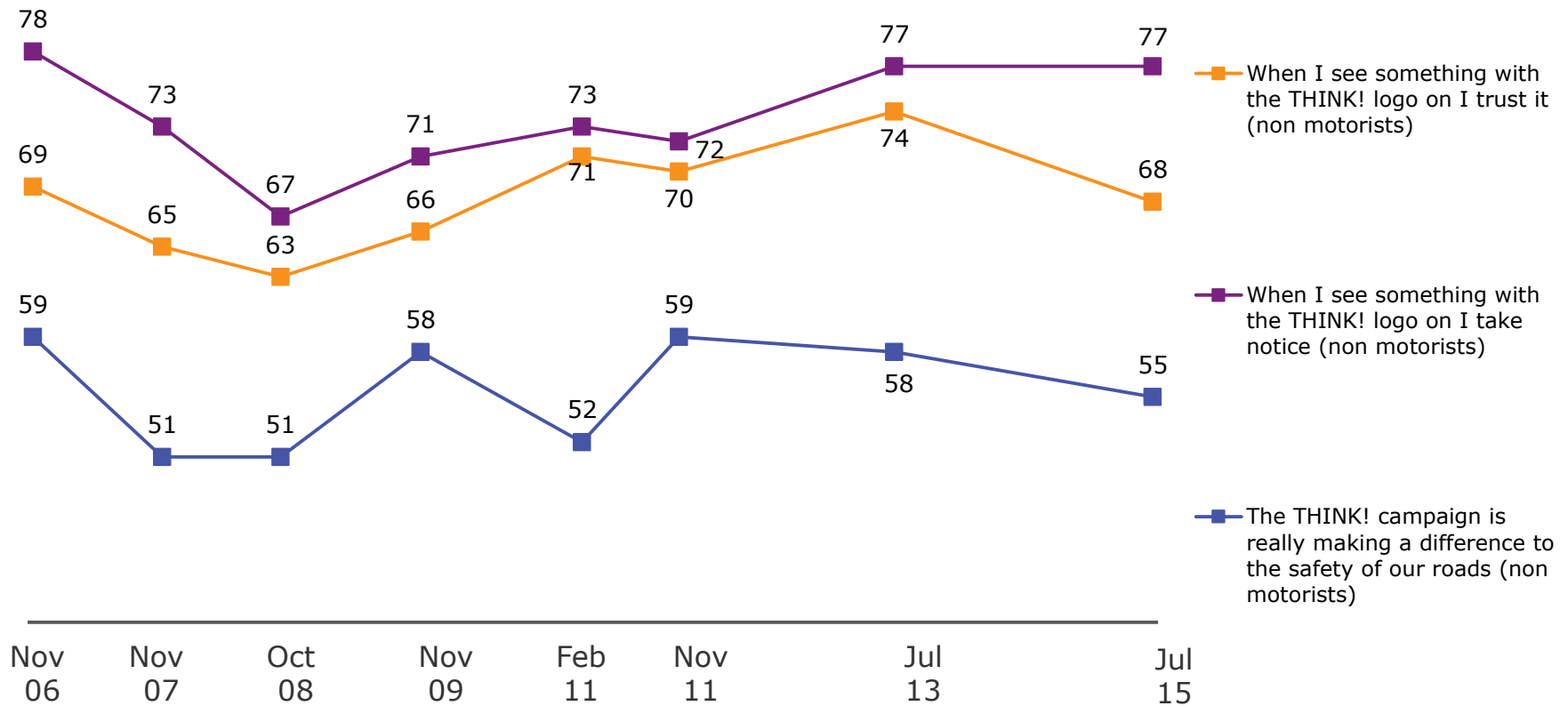
Nov '07 (1,081), Oct '08 (1,020), Nov '09 (1,070), Feb '11 (1,209), Nov '11 (1,044), Jul '13 (1,030), Jul '15 (608)/

Non motorists Nov '06 (576), Nov '07 (536), Oct '08 (569), Nov '09 (585), Feb '11 (488), Nov '11 (602), Jul '13 (538), Jul '15 (214)

\*Sig diff 2013-2015  
Sig. tested at 95%

# The fall in trust was driven mainly by non motorists

## % agree at all with each statement



Q22. To what extent do you agree or disagree with the following statements about the THINK! campaign...

Base: All who recognise the THINK! logo - Motorists Nov '06 (1,277),

Nov '07 (1,081), Oct '08 (1,020), Nov '09 (1,070), Feb '11 (1,209), Nov '11 (1,044), Jul '13 (1,030), Jul '15 (608)/

Non motorists Nov '06 (576), Nov '07 (536), Oct '08 (569), Nov '09 (585), Feb '11 (488), Nov '11 (602), Jul '13 (538), Jul '15 (214)

\*Sig diff 2013-2015  
Sig. tested at 95%

# 6

## Young drivers

# Young Drivers

Young drivers are more likely to engage in and know others who engage in dangerous driving behaviours. In particular, speeding and mobile phone usage are much more frequent among the younger group.

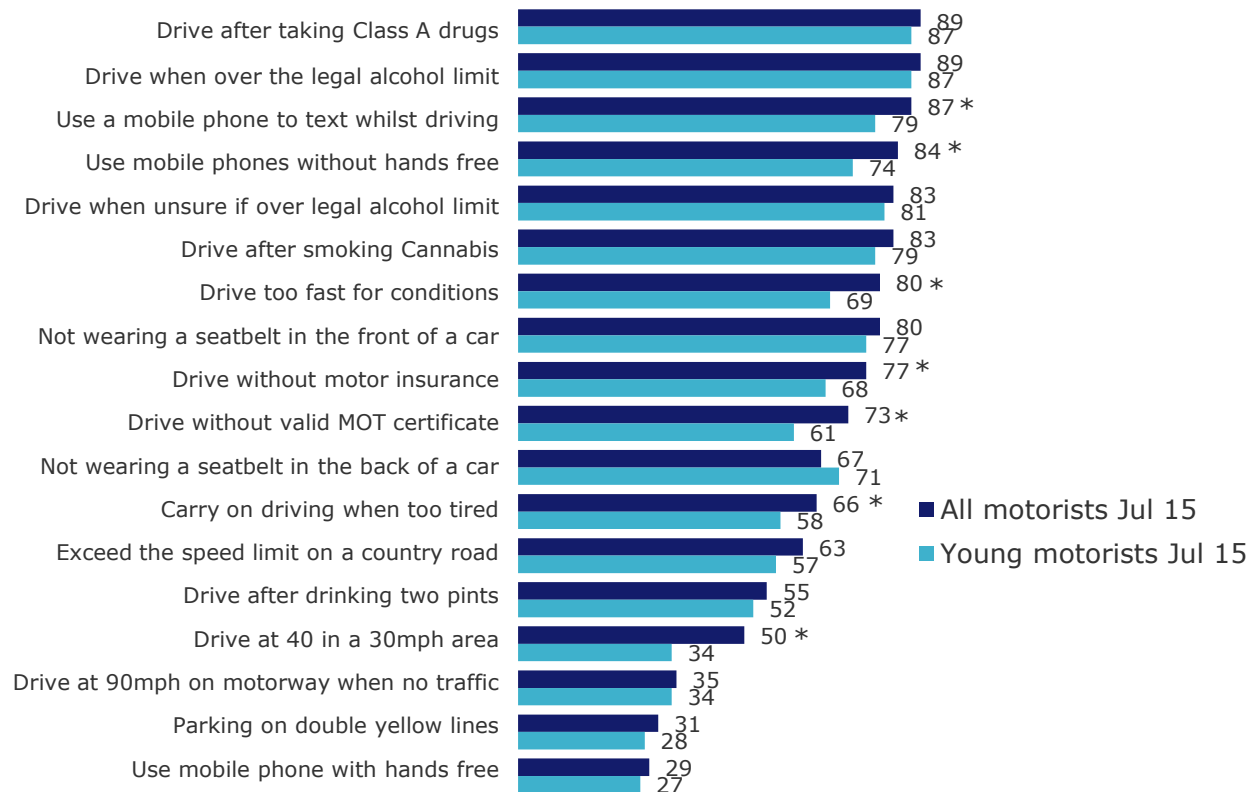
Young drivers are less likely to agree that many behaviours are dangerous and more likely to find a range of behaviours acceptable. The greatest risk behaviours are likely to be speeding, mobile phone use, driving without an MOT or insurance, and driving when tired or after alcohol.

Young drivers are more likely to trust THINK!, take notice of it and think that it makes a difference to road safety.



# Young drivers are less likely to believe a number of behaviours are dangerous, particularly driving at 40 in a 30mph area and driving without a valid MOT

## % Agree completely that each is dangerous

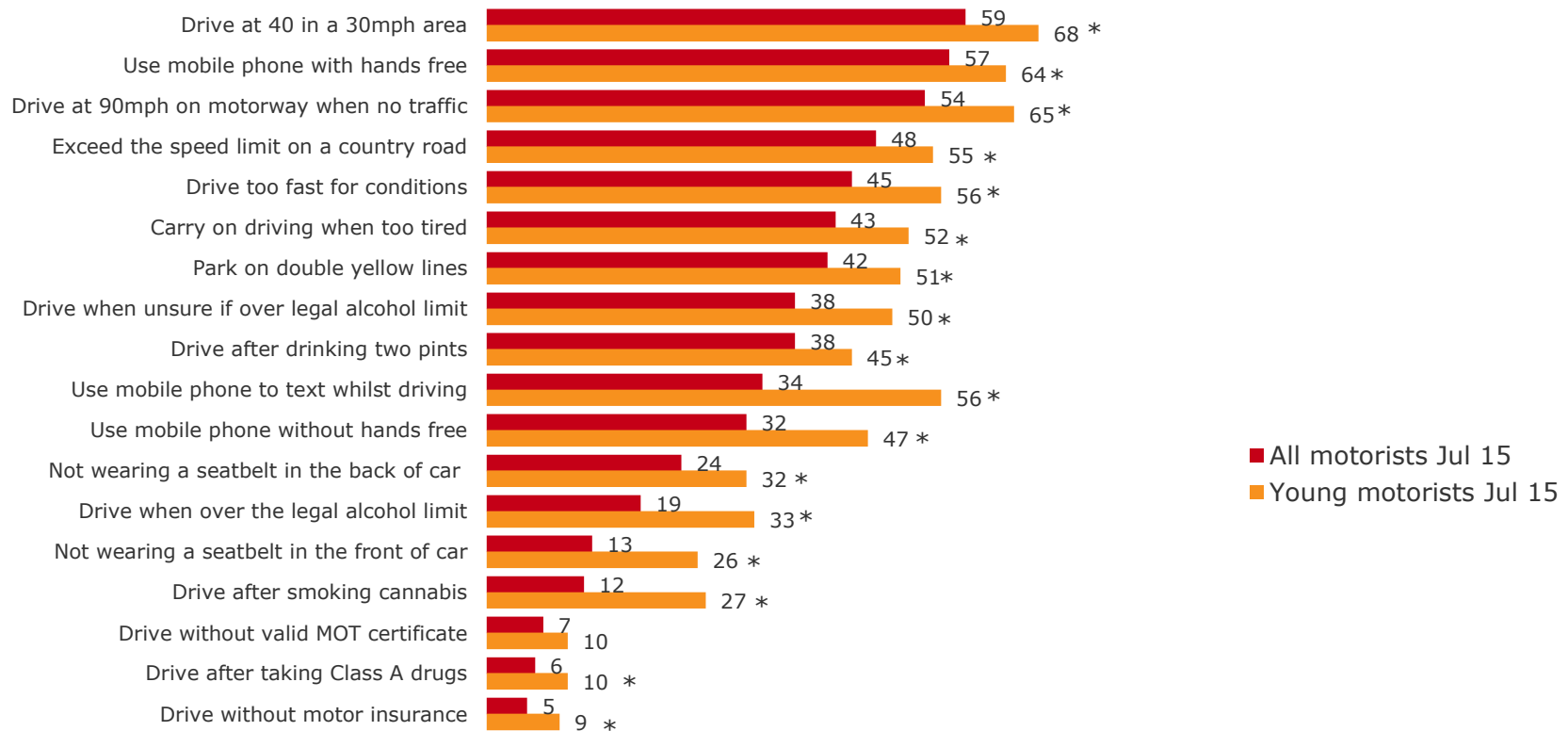


Q8. To what extent would you agree or disagree that the following behaviours are dangerous?  
Base: All motorists, Jul '15 (729)/ Young motorists 18-29, Jul '15 (223)

\*Sig diff young motorists to all motorists  
Sig. tested at 95%

# Young drivers are more likely to know someone who engages in almost all driving behaviours, with the greatest differences for mobile phone use, driving after drinking or smoking cannabis and seatbelt use

## % Know anyone who does this



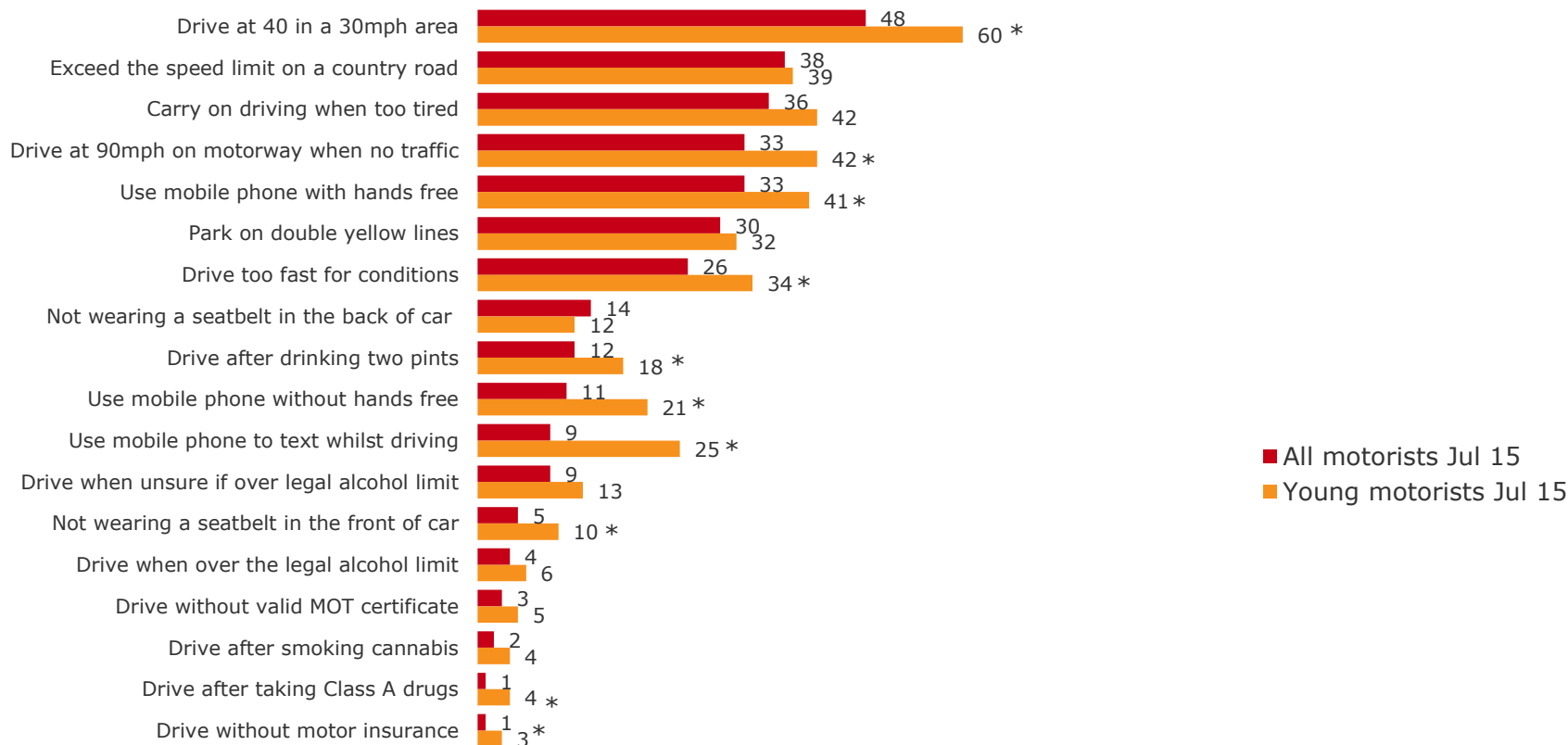
Q16. Thinking about people you know who drive, how many of them do you think...? Data shown = Net: 'Know anyone who does this'  
 Base: All motorists aged 18 or over Jul '15(729)/ Young motorists 18-29 (223)

\*Sig diff young motorists to all motorists  
 Sig. tested at 95%



Young drivers are also more likely to engage in dangerous behaviours, including speeding, mobile phone use in particular, along with drink/drug driving and not wearing a seatbelt in the front

% **Do 'AT ALL'**

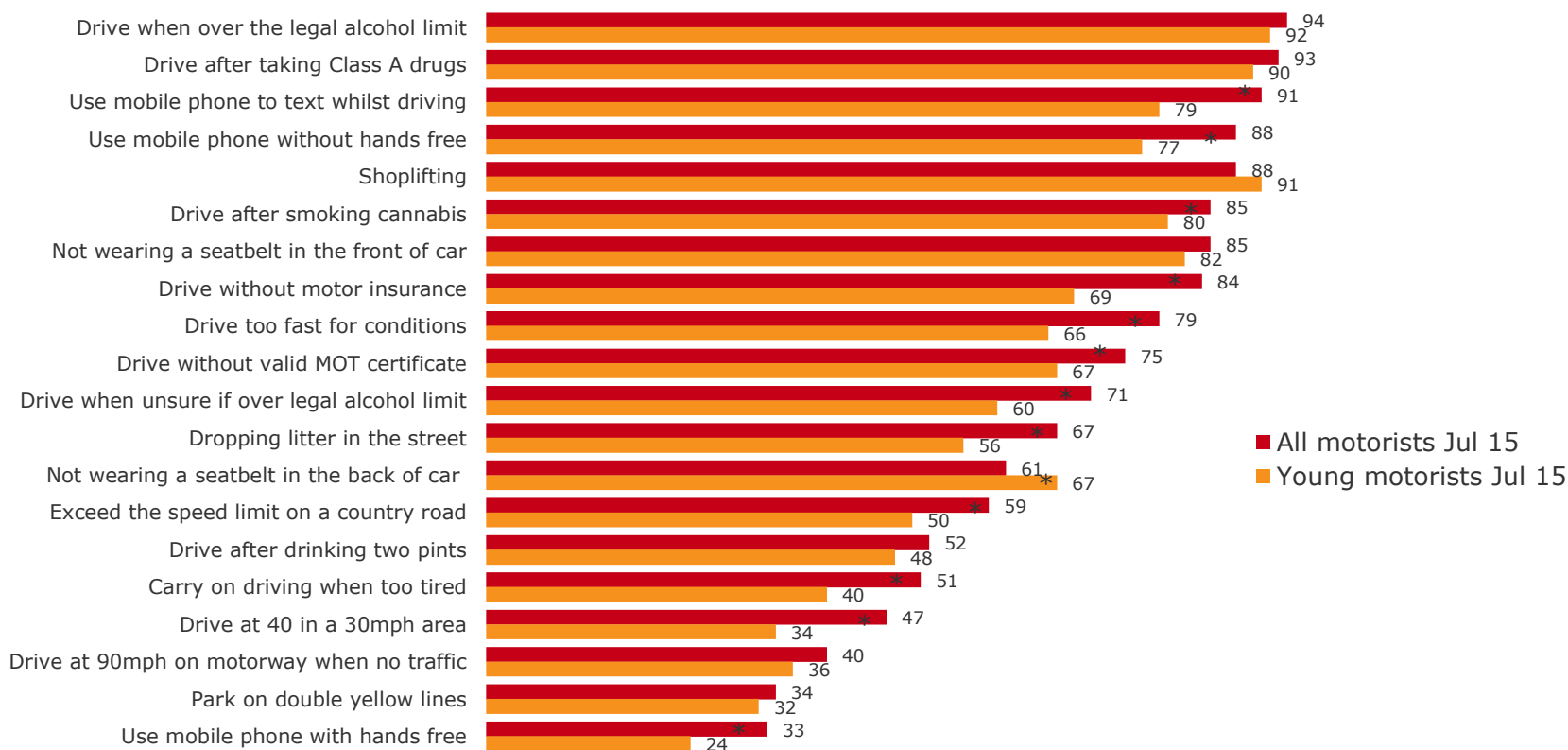


Q15. How frequently, if at all, do you do each of the following? Data shown = Net: 'At All'  
 Base: All motorists aged 18 or over Jul '15 (729)/ Young motorists 18-29 (223)

\*Sig diff young motorists to all motorists  
 Sig. tested at 95%

Young drivers are more likely to find many behaviours acceptable, with the greatest differences for mobile phone use, driving without insurance, driving too fast, driving when tired, or after alcohol

### % 'Extremely unacceptable'

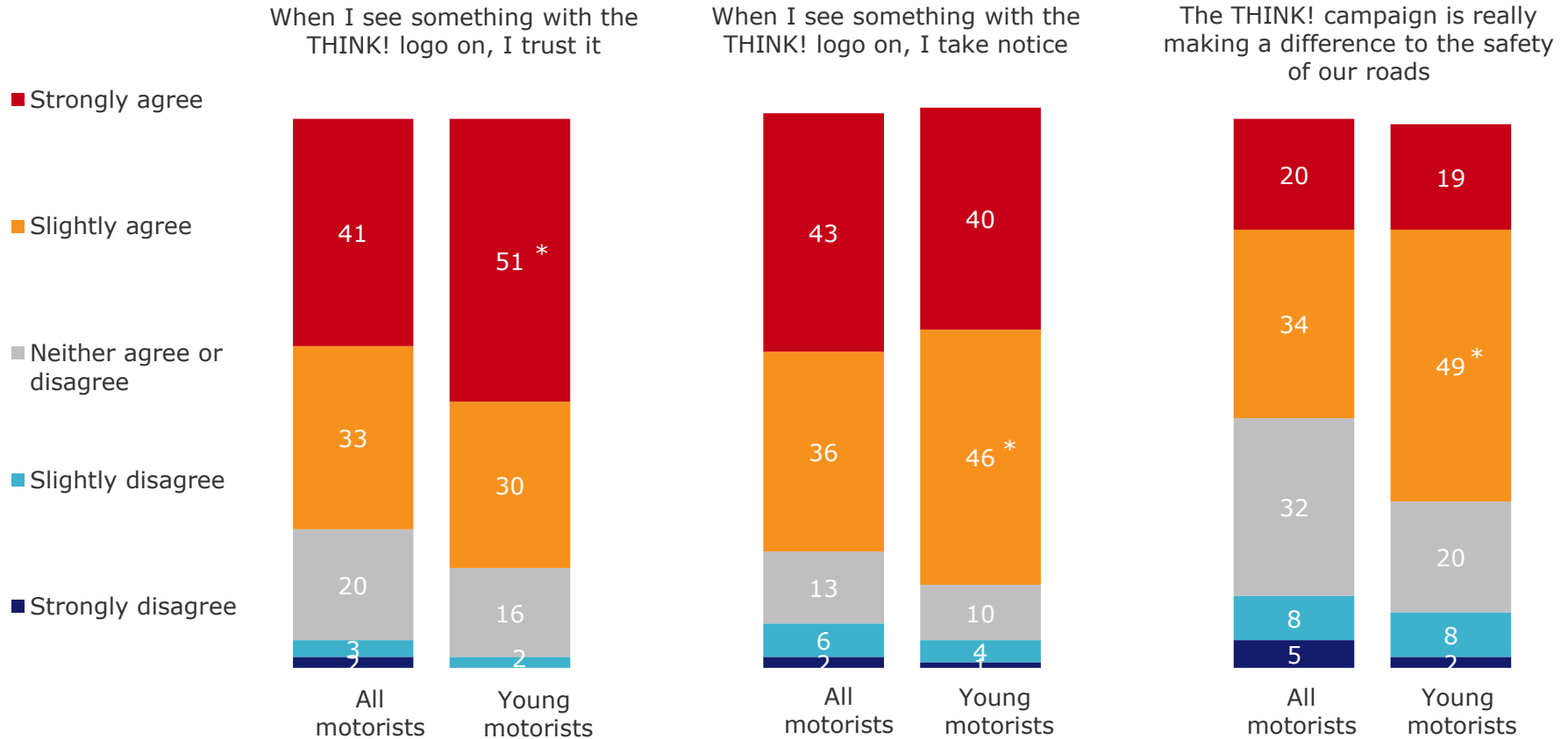


Q9. How acceptable or unacceptable you think it is for people to do these things? Scale from 1 – 5 (5 = 'Extremely unacceptable').  
Base: All motorists Jul '15 (729)/ Young motorists 18-29 Jul '15 (223)

\*Sig diff young motorists to all motorists  
Sig. tested at 95%

# Young drivers are more likely to agree strongly that they trust THINK! and to slightly agree that they take notice and it makes a difference to road safety.

%



Q22. To what extent do you agree or disagree with the following statements about the THINK! campaign...  
Base: All motorists who recognise the THINK! logo (608)/ Young motorists who recognise the THINK! logo (202)

\*Sig diff young motorists to all motorists  
Sig. tested at 95%

# 7

## Sharing of THINK! information

# Sharing of THINK! information

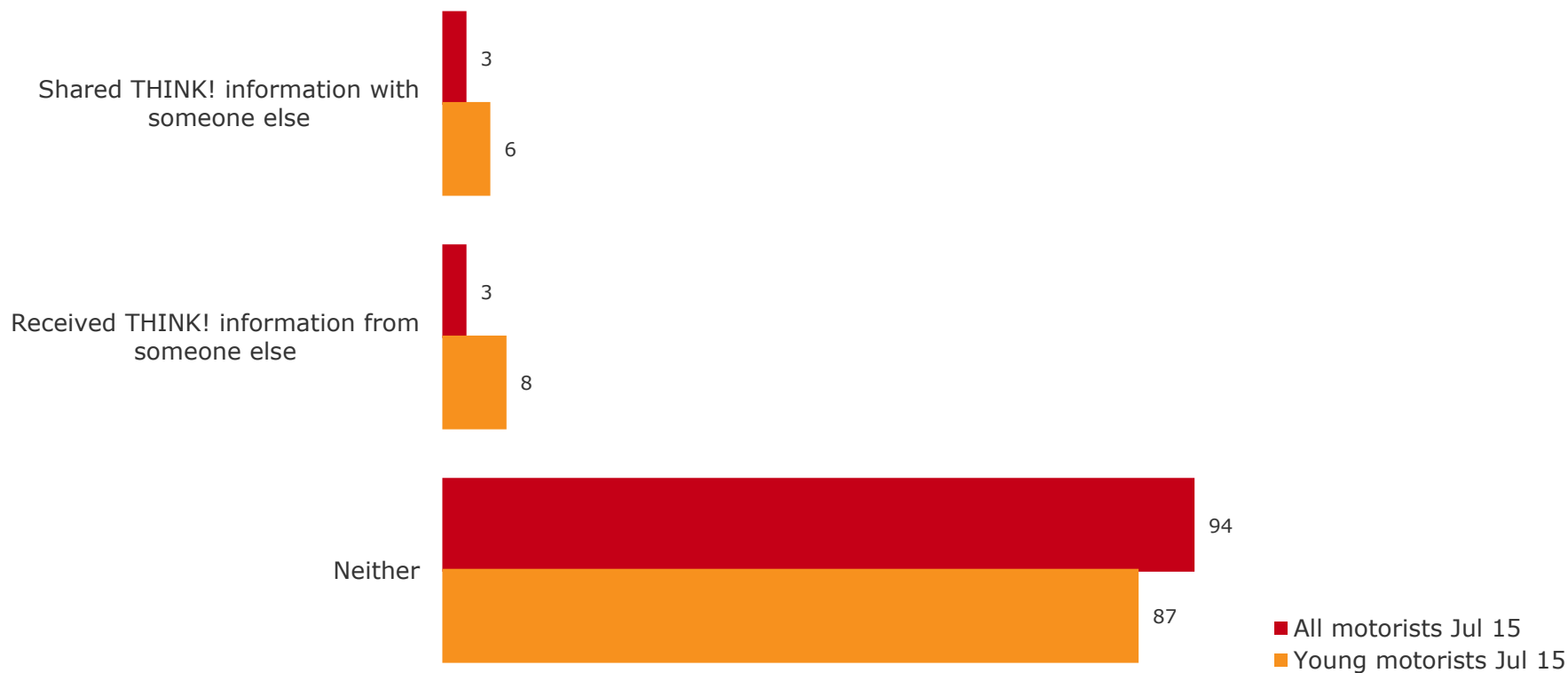
Very few people have shared or received THINK! information in the last 12 months, although young motorists were more likely to have done so.

There were no standout issues that people said they were more likely to share with others, although young motorists were more likely to say they would share information relating to drug driving, which might be a result of the 2015 drug driving legislation and/or campaign.



Very few people said they have shared or received THINK! information in the past 12 months, but of those who had, young motorists were more likely to have done so

%

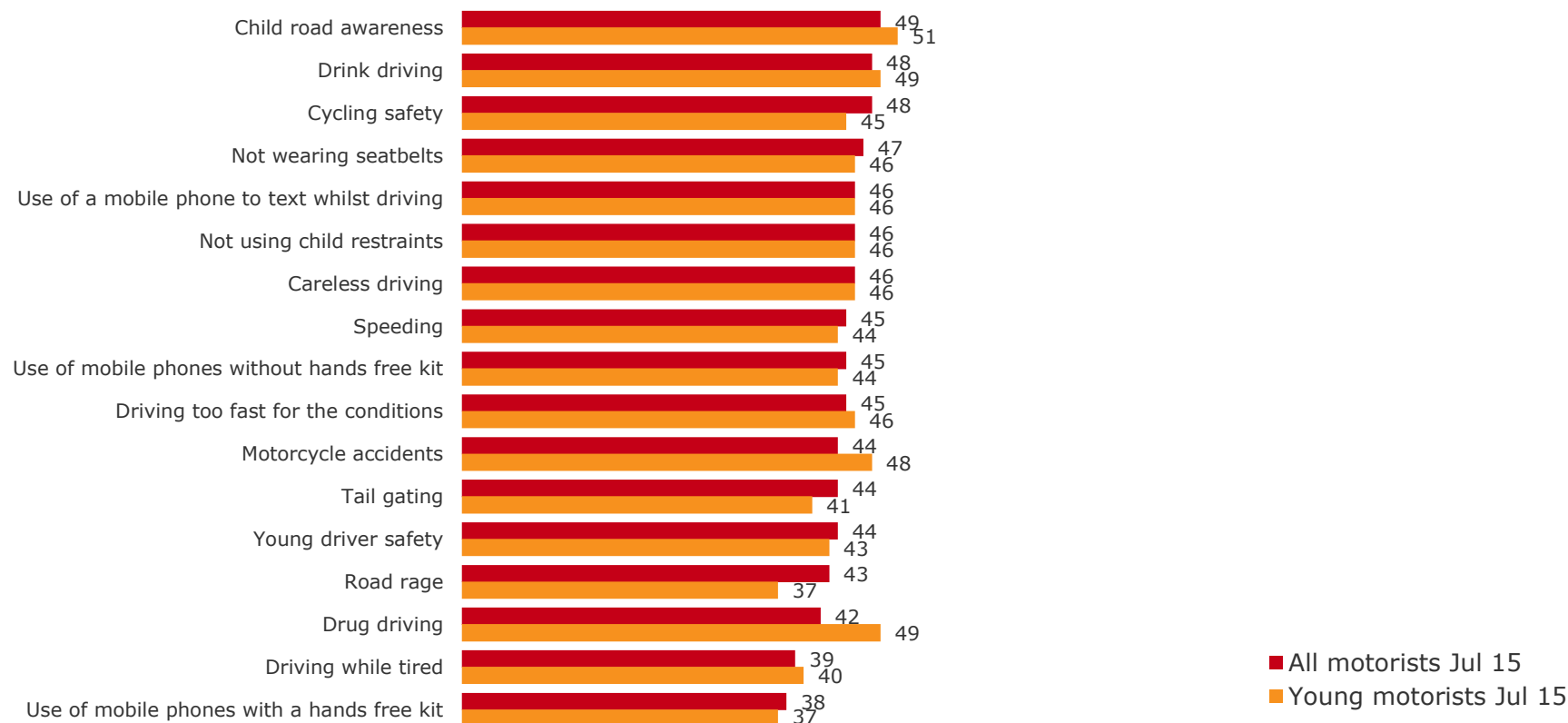


Q25. Now we would like you to think about different sources of information from THINK!, including online videos, leaflets, websites, stickers, and posts or tweets on social media. In the past 12 months, have you:

Base: All motorists Jul '15 (729)/ Young motorists 18-29 Jul '15 (223)

# No specific messages significantly more likely to be shared than others but drug driving more likely to be shared by young motorists, which could be a reflection of the Drug Driving legislation and/or campaign in March 2015

%



Q26. How likely would you be to share THINK! safety messages on the following topics with other people? Data shown= Net:'Likely'  
Base: All motorists Jul '15 (729)/ Young motorists 18-29 Jul '15 (223)

# 8

## Key points - Annual Survey 2015





## Strategic priorities for THINK! – 2015-17

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Country Roads Campaign – October-November 2015

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Drink Driving Campaign – November-December 2015

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Drug Driving Campaign – February-March 2016

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## Key takeouts from 2015 THINK! Survey

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Two thirds agree completely that exceeding the speed limit on country roads is dangerous and extremely unacceptable but around one in two know someone who does this and one in three admit to doing it

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Despite drink driving still being the most important issue that people think the government should address, fewer people in 2015 view it as dangerous and unacceptable. The fall in unacceptability was driven, in part, by 17-34 year olds. More positively, fewer people now know someone who drives when over the alcohol limit or when unsure (when compared with 2013)

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Very few people say they drug drive or know someone who drug drives, although there has been a slight increase in those saying they know someone who drives after smoking cannabis. Drug driving is viewed as unacceptable and dangerous by most people but the level of agreement for both measures reduced in 2015.

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## Strategic priorities for THINK! – 2015-17

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Cycling Campaign – February-April 2016

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Continue to monitor the impact of reduced spend on the THINK! brand

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## Key takeouts from 2015 THINK! Survey

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More people now think that the government should be addressing cycling safety compared with 2013 (15% up from 10%) but, encouragingly, more people now say they look out for cyclists in their mirrors at junctions.

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Despite an increase in awareness of road safety advertising from THINK! sources, recognition of the logo has fallen since 2013 to three in four.

The THINK! brand continues to be perceived in largely positive terms, but levels of trust, and belief that the ads make a difference to road safety have decreased slightly, driven especially by 30-44 year olds.

Motorists in particular are less likely to agree that THINK! makes a real difference.

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## Strategic priorities for THINK! – 2015-17

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Explore whether to develop content and educational resources targeted to pre/young drivers

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Produce more content specifically designed for social media channels that gives people a reason to engage and prompts conversations, but is also integrated with the wider campaign

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## Key takeouts from 2015 THINK! Survey

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Young drivers are more likely to engage in and know others who engage in dangerous driving behaviours. In particular, speeding and mobile phone usage are much more frequent among the younger group. Young drivers are less likely to agree that many behaviours are dangerous and more likely to find a range of behaviours acceptable. The greatest risk behaviours are likely to be speeding, mobile phone use, driving without an MOT or insurance, and driving when tired or after alcohol. Young drivers are particularly positive about THINK!: they are more likely to trust THINK! and at an overall level are more likely to notice campaigns and to feel that they have an impact.

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Very few people have shared or received THINK! information in the last 12 months, although young motorists were more likely to have done so. There were no standout issues that people said they were more likely to share with others, although young motorists were more likely to say they would share information relating to drug driving, which might be a result of the 2015 drug driving legislation and/or campaign.

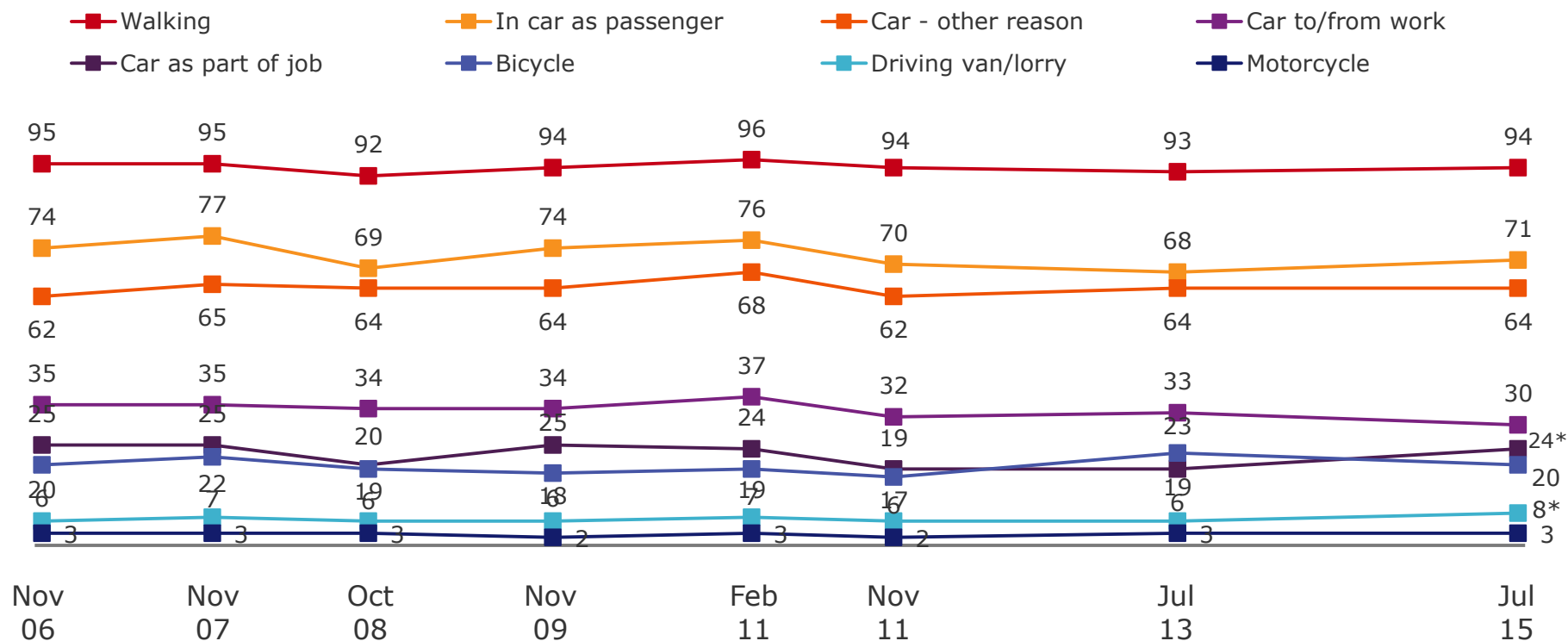
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# 9

## Appendix – Driver Profiles

# Types of journey made

%



Q1. In a typical week, how many hours do you spend doing each of the following? Data shown = Net: 'At All'.

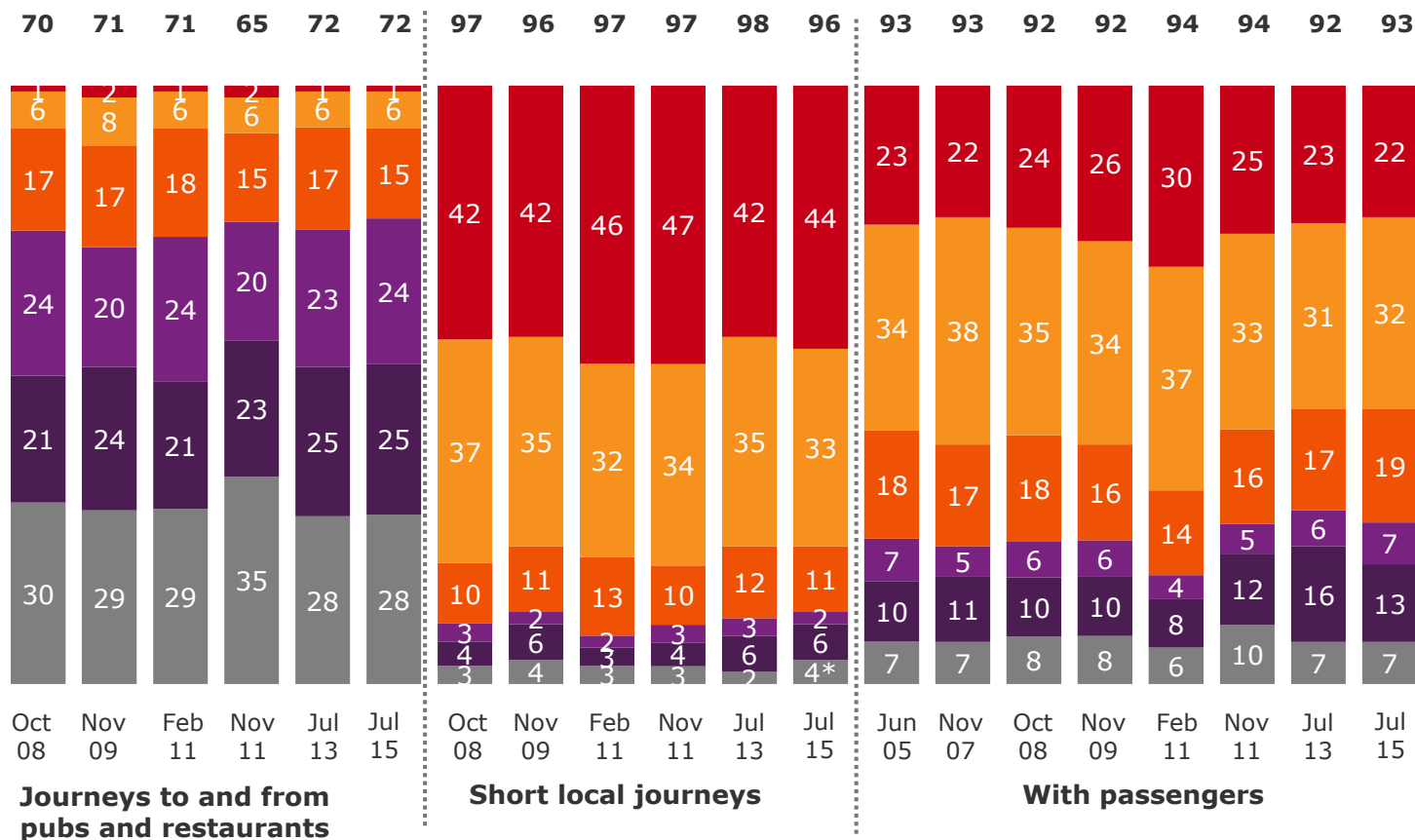
Base: All respondents June '05 (2,240), Nov '06 (2,259), Nov '07 (2,019), Oct '08 (2,009), Nov '09 (2,010), Feb '11 (2,003), Nov '11 (2,007), Jul '13 (1,853), Jul '15 (1,090)

\*Sig. tested at 95%

# Types of journey made

% At all

- 5+ times per week
- 2-4 times per week
- Once a week
- Once a month
- Less often
- Never



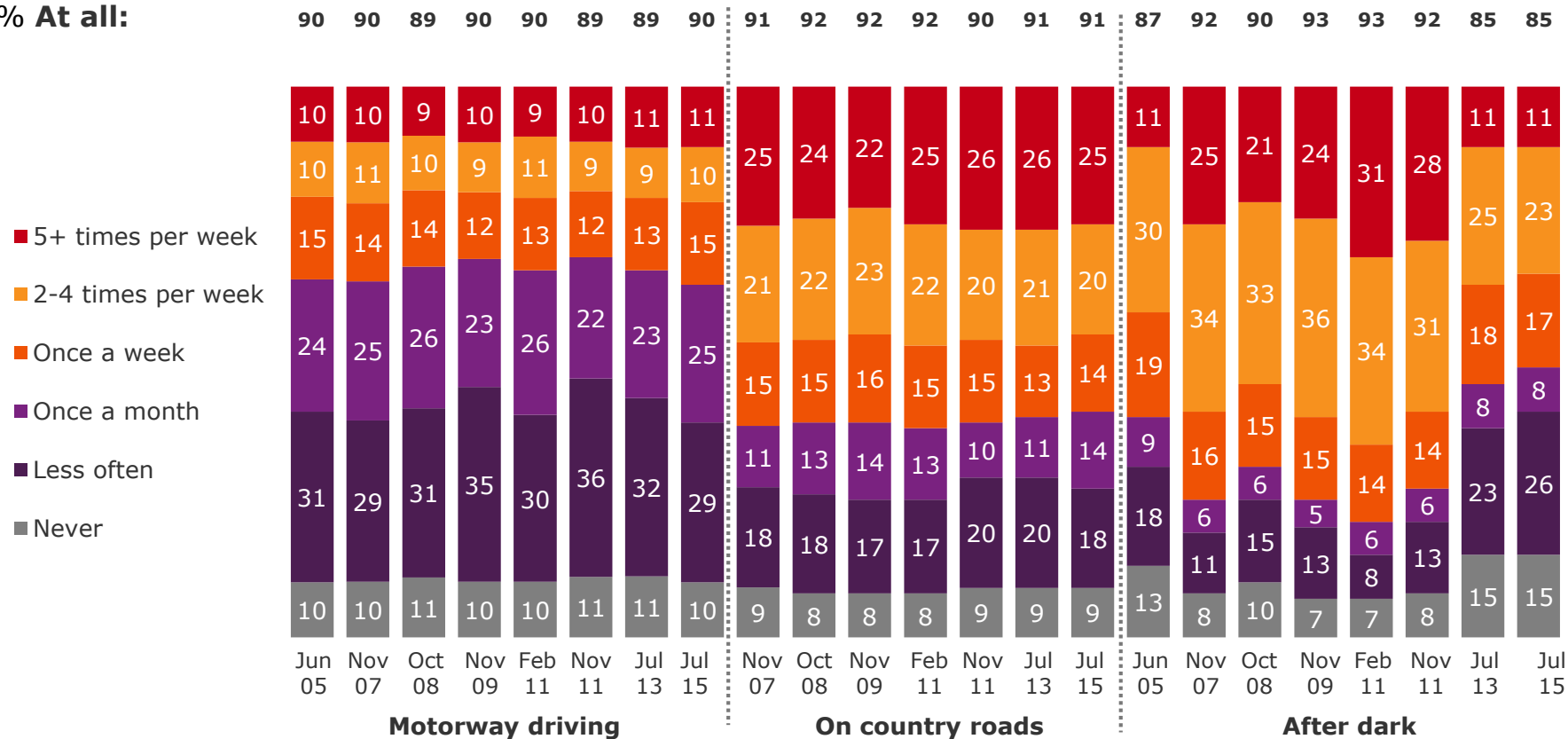
Q4. How frequently do you make the following type of journeys by motor vehicle?

Base: All car/van/lorry drivers Nov '06 (1,517), Nov '07 (1,256), Oct '08 (1,214), Nov '09 (1,227), Feb '11 (1,371), Nov '11 (1,171), Jul '13 (1,151), Jul '15 (716)

\*Sig. tested at 95%

# Types of journey made

% At all:



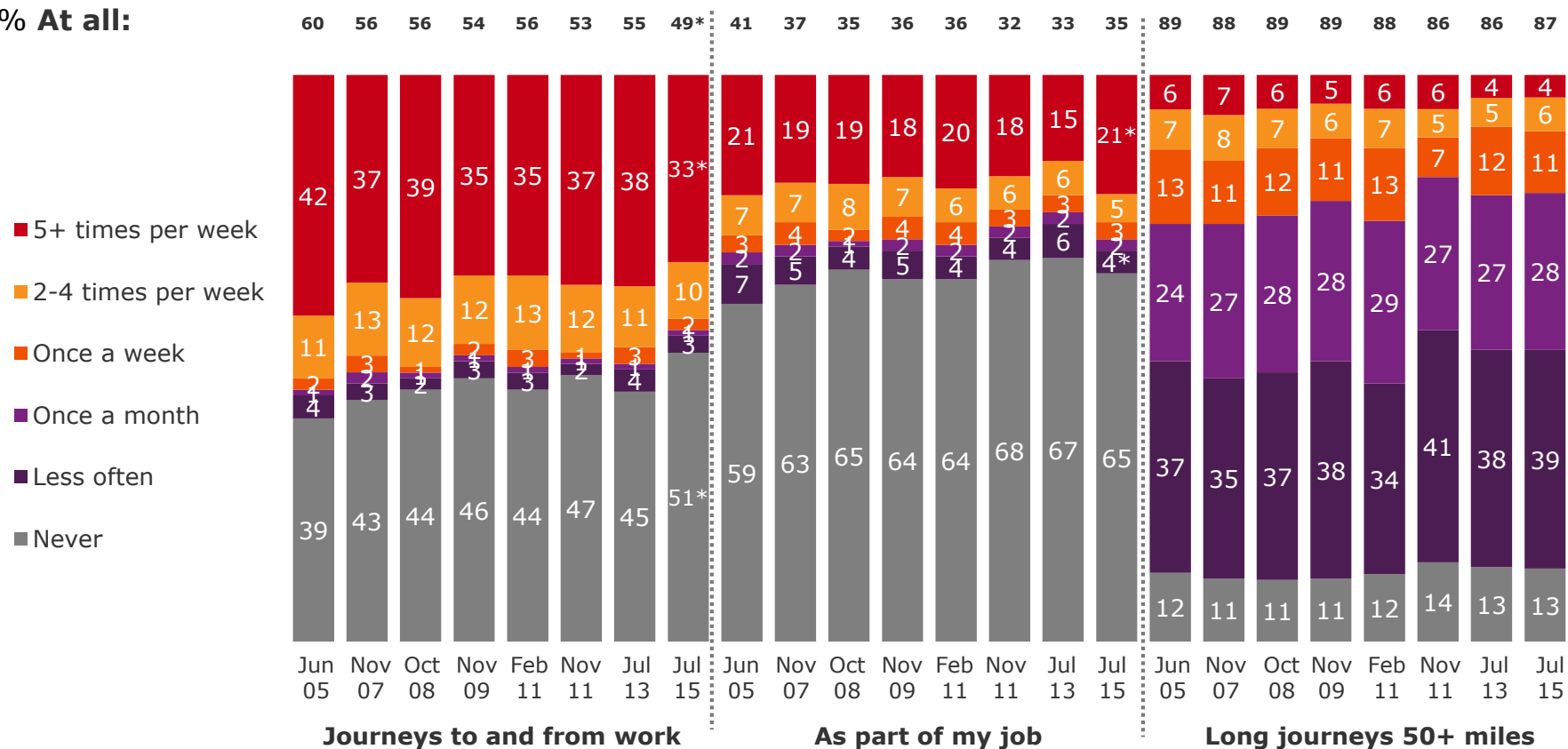
Q4. How frequently do you make the following type of journeys by motor vehicle?

Base: All car/van/lorry drivers Nov '06 (1,517), Nov '07 (1,256), Oct '08 (1,214), Nov '09 (1,227), Feb '11 (1,371), Nov '11 (1,171), Jul '13 (1,151), Jul '15 (716)

\*Sig. tested at 95%

# Types of journey made

% At all:



Q4. How frequently do you make the following type of journeys by motor vehicle?

Base: All car/van/lorry drivers Nov '06 (1,517), Nov '07 (1,256), Oct '08 (1,214), Nov '09 (1,227), Feb '11 (1,371), Nov '11 (1,171), Jul '13 (1,151), Jul '15 (716)

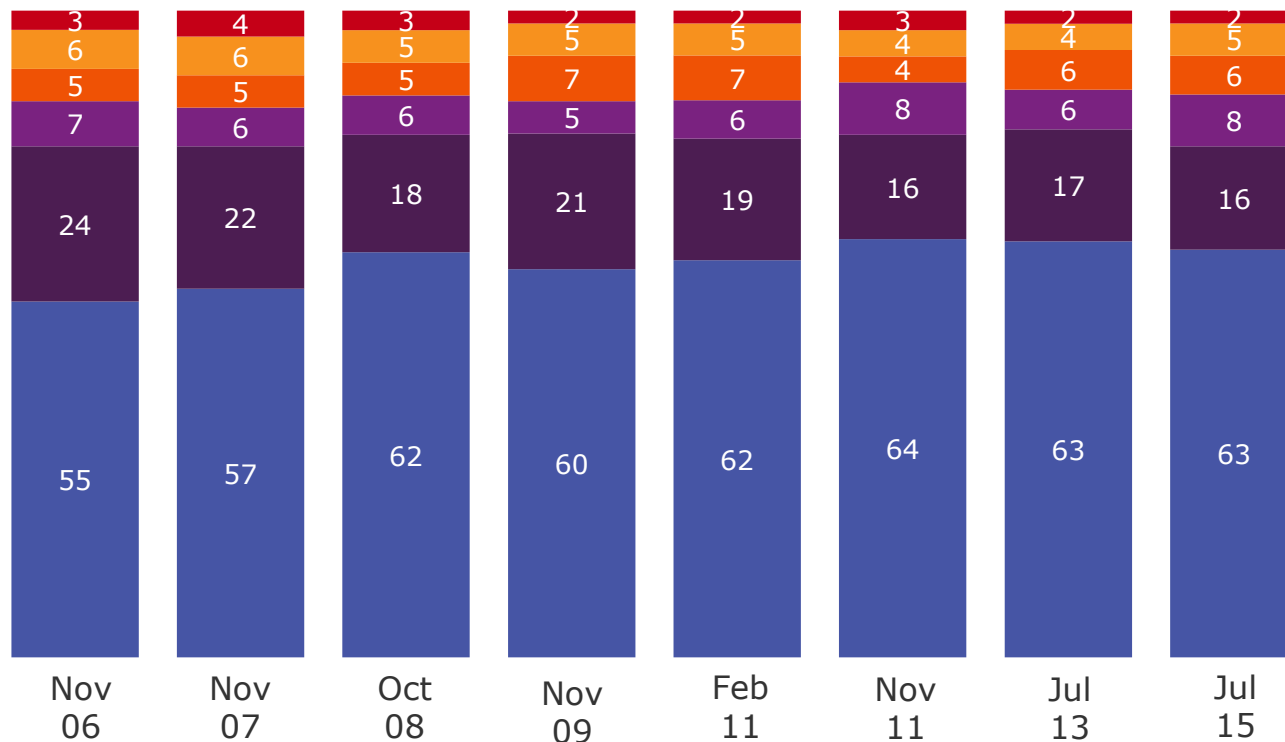
\*Sig. tested at 95%



# Driving Experience

%

- less than 1
- 1 to 3
- 3 to 6
- 6 to 10
- 10 to 20
- More than 20



Q13. How long have you been driving?

Base: All motorists Nov '06 (1,489), Nov '07 (1,274), Oct '08 (1,227), Nov '09 (1,233), Feb '11 (1,371), Nov '11 (1,184), Jul '13 (1,162), Jul '13 (729)

\*Sig. tested at 95%