



RITS: Driver Attitudes and Behaviour Tracking

Latest trends - February/March 2018

(Wave 16)

May 2018

260142516



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1

Background and method

Background and objectives



Scottish Government and Road Safety Scotland tend to run 2-3 media campaigns per year, supported by other activity on a more localised level, as part of a wider strategy to reduce road casualties



These campaigns are generally evaluated on an ad hoc basis among their specific target audiences at the point in time when they are running



However it was recognised that there was no on-going tracking to assess the longer term effect of campaigns or local activity on driver behaviours and attitudes more generally – are there any changes occurring in these over time and are these for the better?



Against this background, a survey mechanism was set up in September 2010 to monitor driver behaviour and attitudes in Scotland in relation to some key issues of road safety on a continuous basis, with surveys conducted twice a year: Latest results are from wave 16

Kantar TNS is certified to ISO 20252 (the International Standard for Market, Opinion and Social Research) and ISO 9001 (the International Process Standard for Service Companies). All project work is carried out in compliance with these standards and in line with the UK Data Protection Act 1998. Kantar TNS adheres to the MRS/ESOMAR codes of conduct

Research method



Around 1,000 in-home* interviews are conducted each wave among a representative sample of the population of Scotland aged 16+ on Kantar TNS face-to-face omnibus

Respondents screened to interview only active drivers (i.e. adults who hold a full driving licence for a car and drive nowadays) – 561 drivers at **Wave 16:** 21 February – 13 March 2018

Started in 2010; runs twice during 12 month period; data from c13 of the 16 waves shown

Additional fieldwork boost conducted among drivers aged 17-25 to generate total sample of 157 young drivers (21 February – 18 March 2018)

Fifth wave of separate yearly tracking for this group

**Computer Assisted Personal Interviewing*

2

Speeding

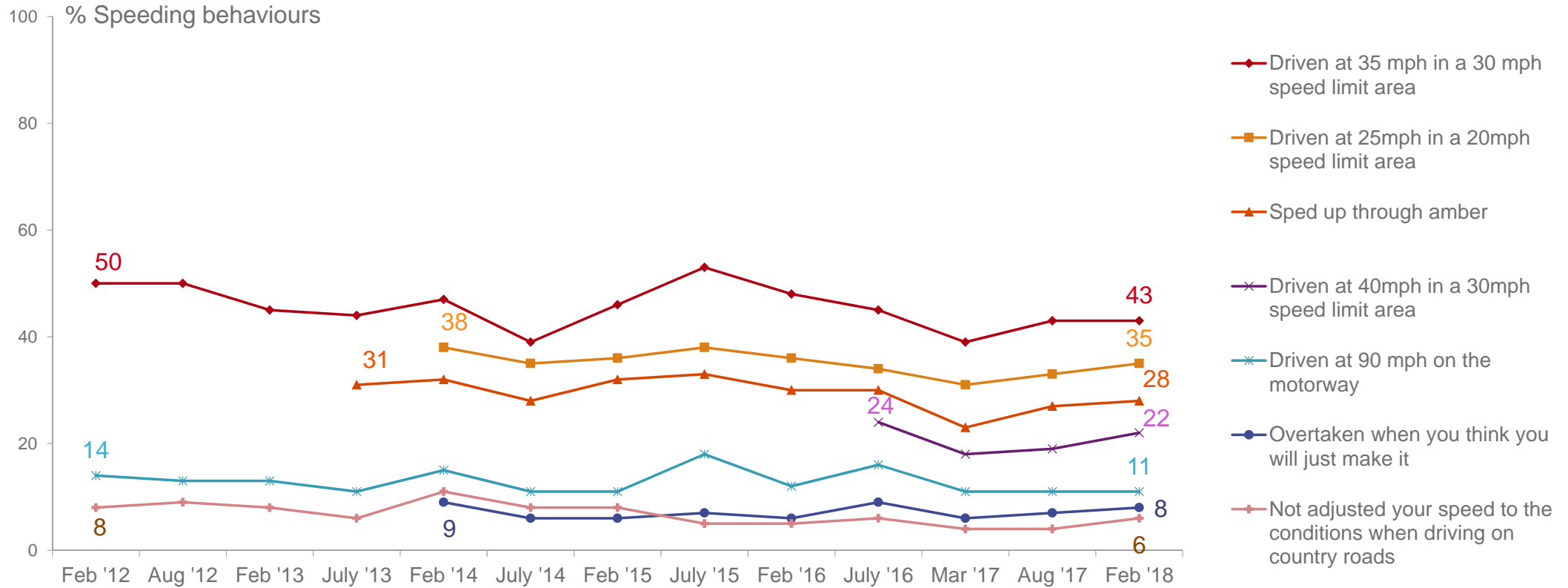
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

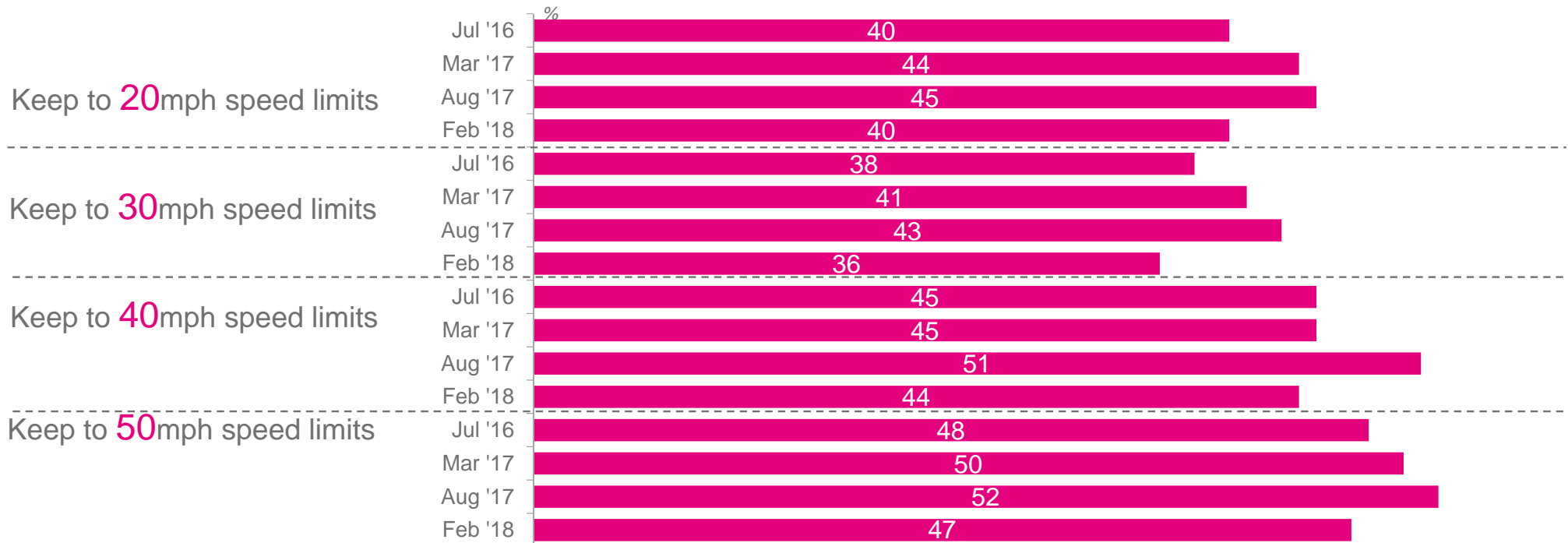
Speeding behaviours have generally increased slightly in past year, following a period of decline. Speeding at 35 in 30mph does however remain well below levels recorded over 5 years ago



Base: All who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

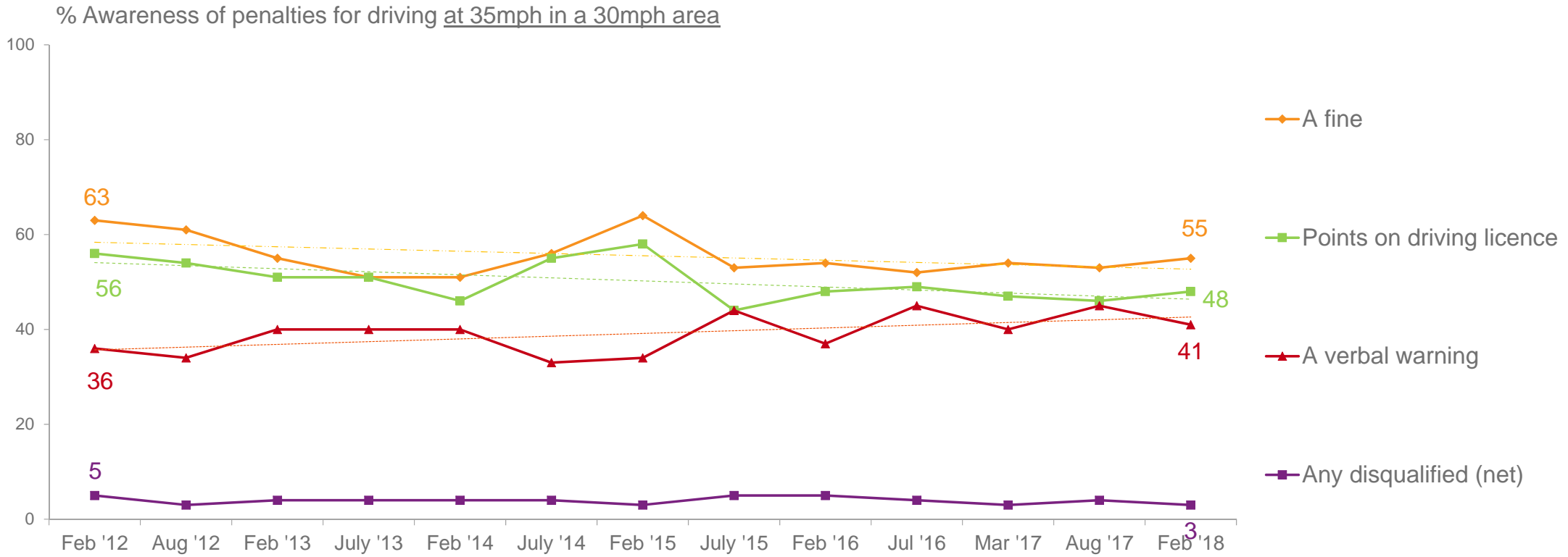
Adherence to speed limits improved over first 3 waves of tracking but has slipped back at most recent wave

% claiming to always...



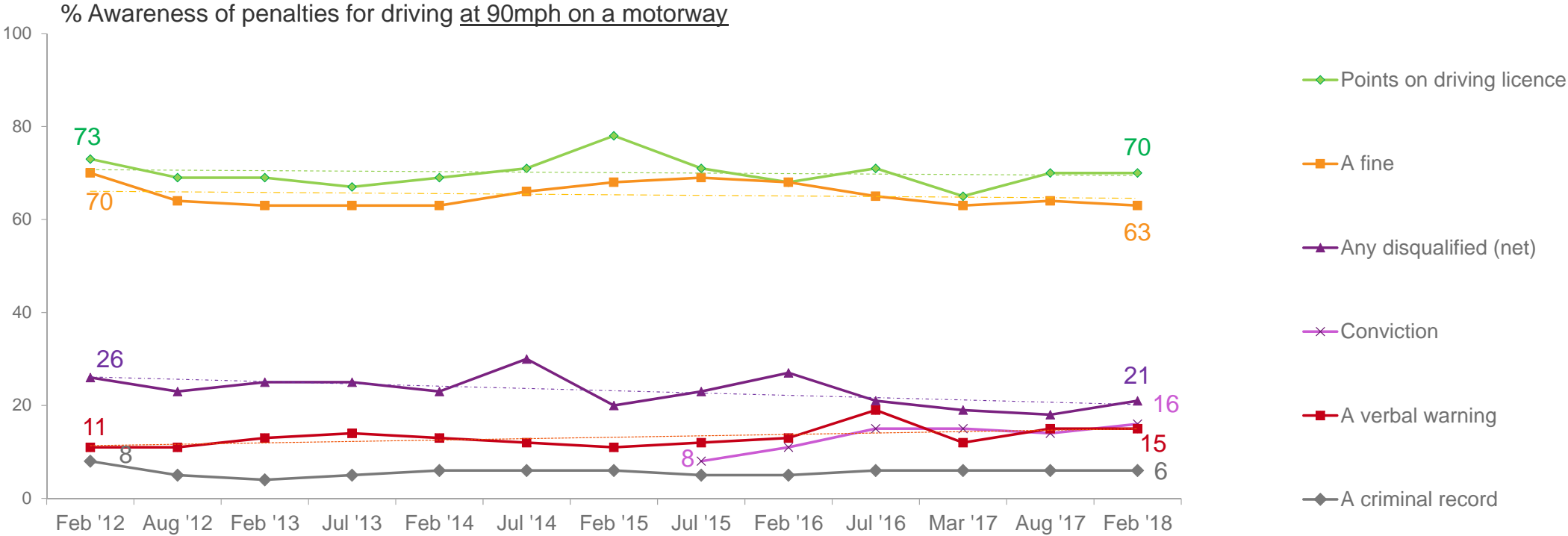
Base: All who hold a full driving licence for a car and drive nowadays at each wave Jul '16 (582); Mar '17 (600); Aug '17 (525); Feb '18 (561)
 Q8a: How frequently do you....?

Awareness of a verbal warning as a penalty for speeding continues to fluctuate, but shows a longer term increase in contrast to general downward trend for a fine and points



Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

Reference to a verbal warning as a penalty for driving at 90mph on a motorway continues to slowly increase whereas a downward trend is observed for disqualification

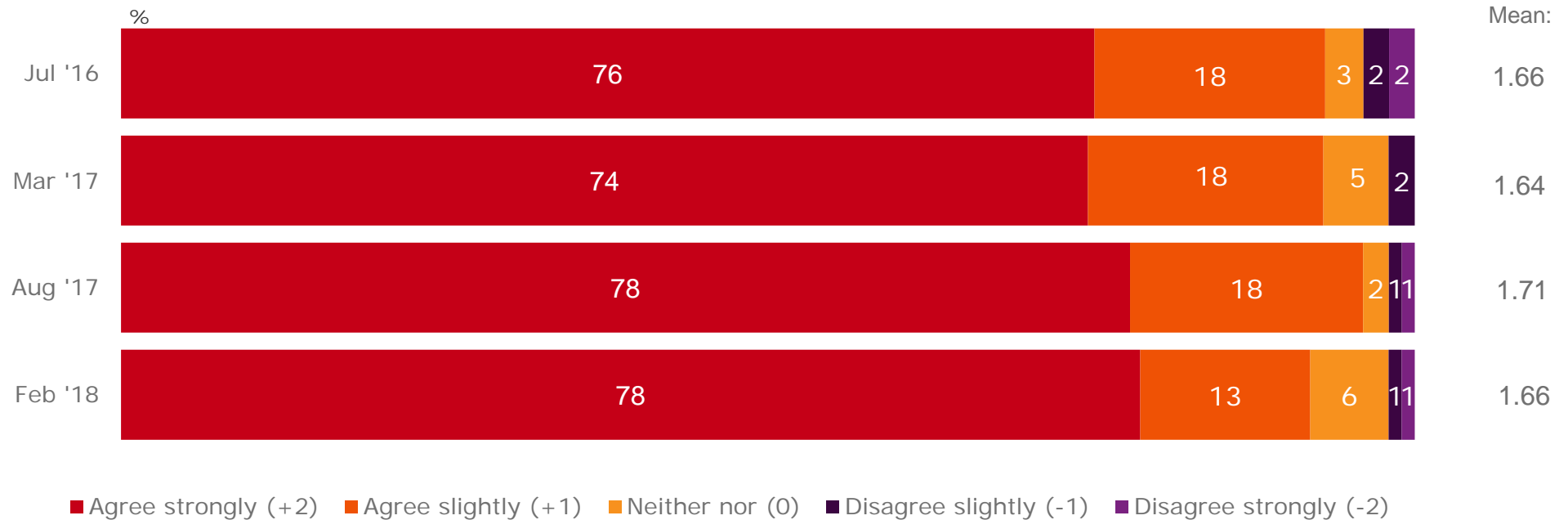


Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

The increased agreement in August '17 that speed should be reduced in built up areas has not been sustained, highlighting importance of VRU campaign activity in March '18

% agreeing/disagreeing:

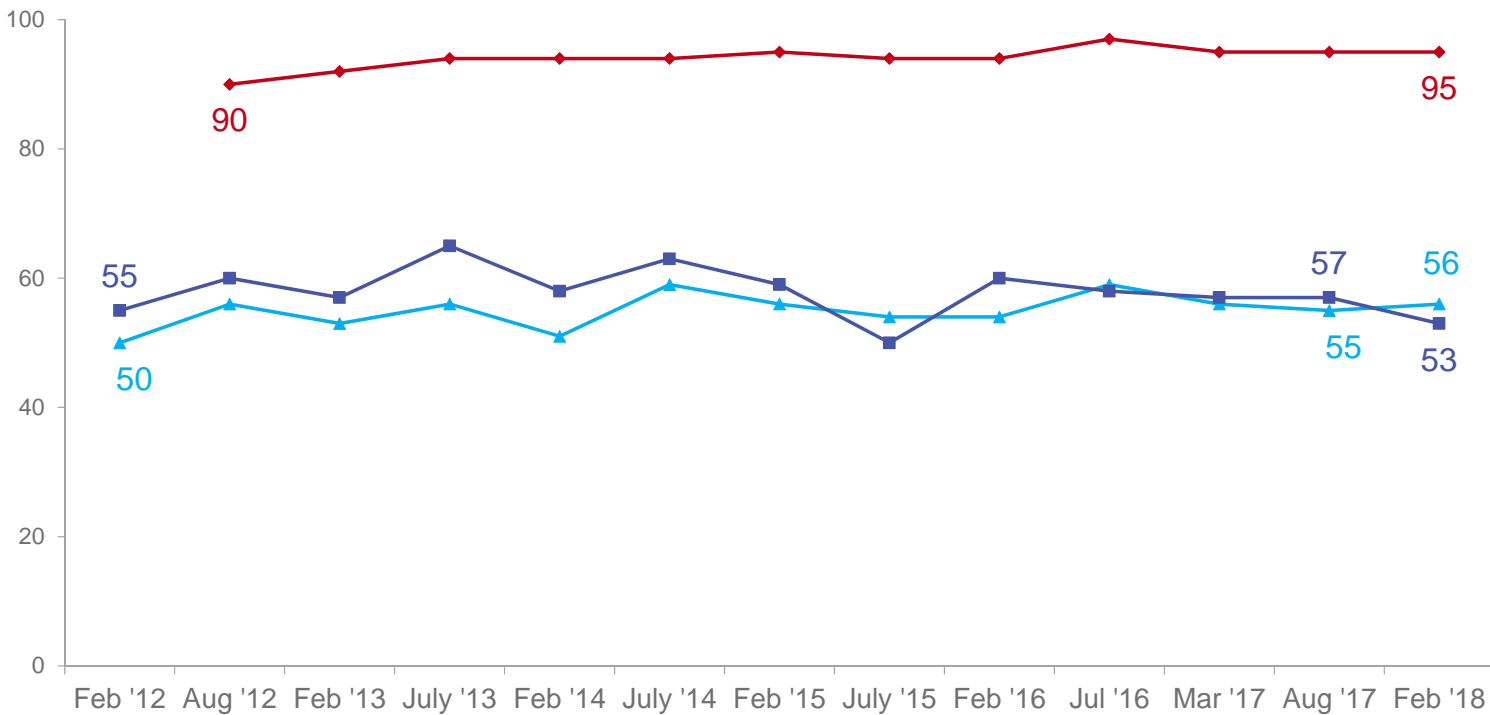
In built up areas, where there are pedestrians and cyclists, it may be necessary to drive below the speed limit



Base: All who hold a full driving licence for a car and drive nowadays at each wave
Q4: How much do you agree or disagree that.....

The consensus on the need to continually adjust your speed on country roads continues to increase, very gradually. Support for a 50mph speed limit, while at a much lower level, is also trending slowly upwards

% saying Agree strongly/agree slightly



—◆ You should continually adjust your speed when driving on country roads*

—▲ There should be a maximum speed limit of 50mph on all country roads because of the greater risks when driving on these

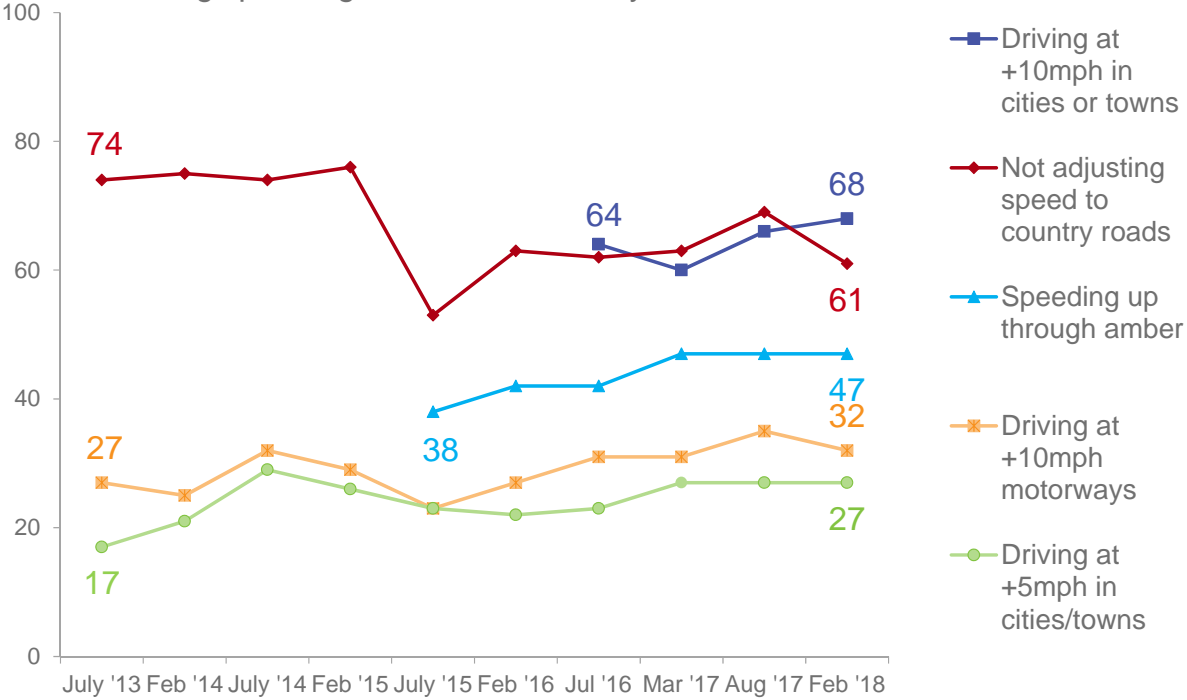
—■ More fatal accidents in Scotland happen on country roads than on any other type of road

* Minor change in text from 'you need to continually assess your speed...' Jul '16

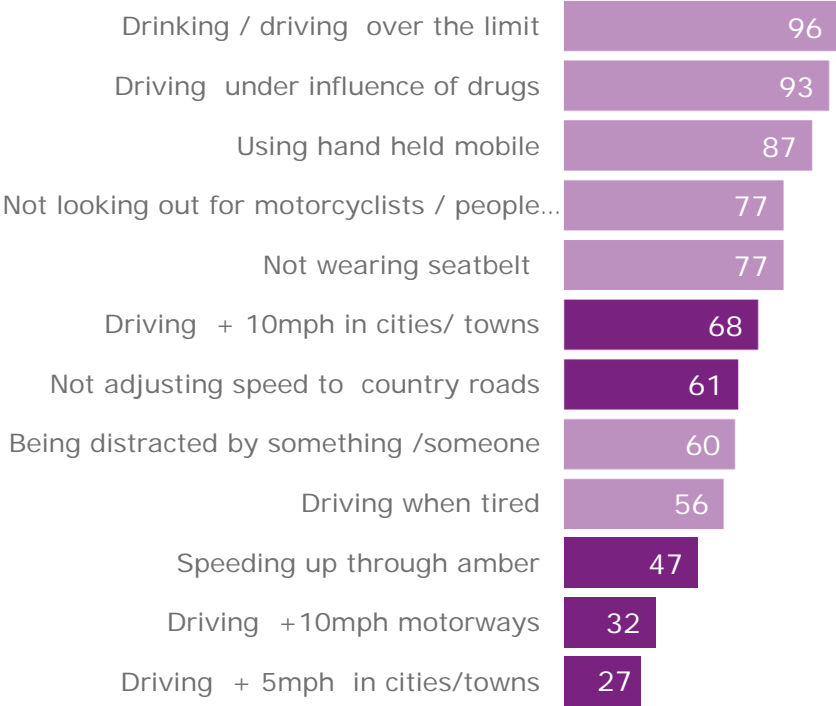
Base: All who hold a full driving licence for a car and drive nowadays
Q4: How much do you agree or disagree that ...?

Perceived seriousness of driving at +10mph in built up areas continues to rise, whereas it remains stable for driving at +5mph. Risks of not adjusting speed to country roads has fallen back significantly at latest wave

% rating speeding behaviours as 'very serious'- TRENDS



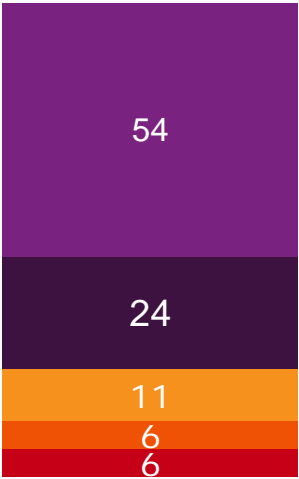
% rating 'very serious' across all behaviours in February 18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

Agreement on the use of road safety cameras on Scotland's roads is positive as drivers see the benefits in terms of preventing accidents and discouraging dangerous driving. However, there is a cynical perception that cameras are also a revenue stream

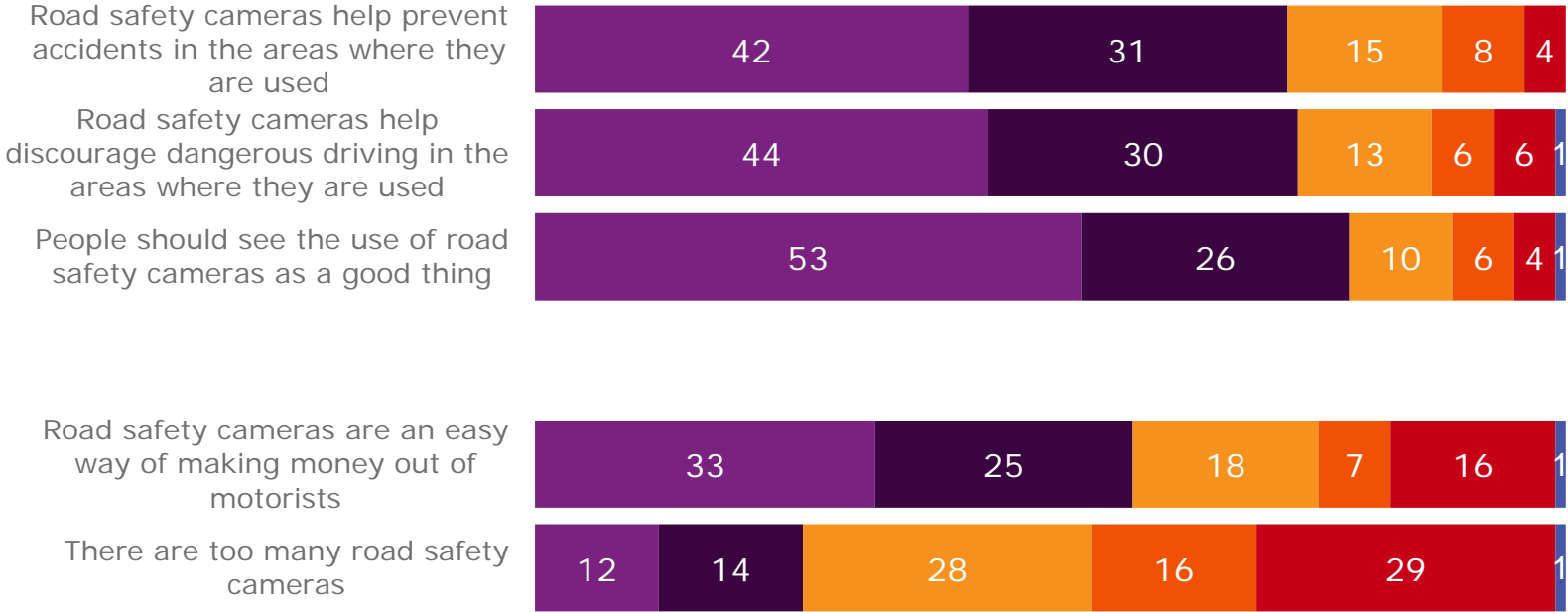
Agreement with the use of road safety cameras on Scotland's roads (%)



Feb '18

■ Agree strongly (+2) ■ Agree slightly (+1) ■ Neither nor (0) ■ Disagree slightly (-1) ■ Disagree strongly (-2) ■ Don't know

Agreement with statements about road safety cameras in general (%) – Feb '18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 QSC1: How much do you agree or disagree with the use of road safety cameras on Scotland's roads?

Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 QSC2: Here are some statements people have made about road safety cameras in general, including both speed cameras and red traffic light cameras. For each one please indicate the extent to which you agree or disagree with the statement.
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Summary

- Speeding behaviours have generally increased slightly in past year, following a period of decline. Speeding at 35 in 30mph does however remain well below levels recorded over 5 years ago
- Adherence to speed limits improved over first 3 waves of tracking but has slipped back at most recent wave
- Awareness of a verbal warning as a penalty for speeding continues to fluctuate, but shows a longer term increase in contrast to general downward trend for a fine and points
- Reference to a verbal warning as a penalty for driving at 90mph on a motorway continues to slowly increase whereas a downward trend is observed for disqualification
- The increased agreement in August '17 that speed should be reduced in built up areas has not been sustained, highlighting importance of VRU campaign activity in March '18
- The consensus on the need to continually adjust your speed on country roads continues to increase, very gradually. Support for a 50mph speed limit, while at a much lower level, is also trending slowly upwards
- Perceived seriousness of driving at +10mph in built up areas continues to rise, whereas it remains stable for driving at +5mph. Risks of not adjusting speed to country roads has fallen back significantly at latest wave
- Agreement on the use of road safety cameras on Scotland's roads is positive as drivers see the benefits in terms of preventing accidents and discouraging dangerous driving. However, there is a cynical perception that cameras are also a revenue stream

3

Drink and drug driving

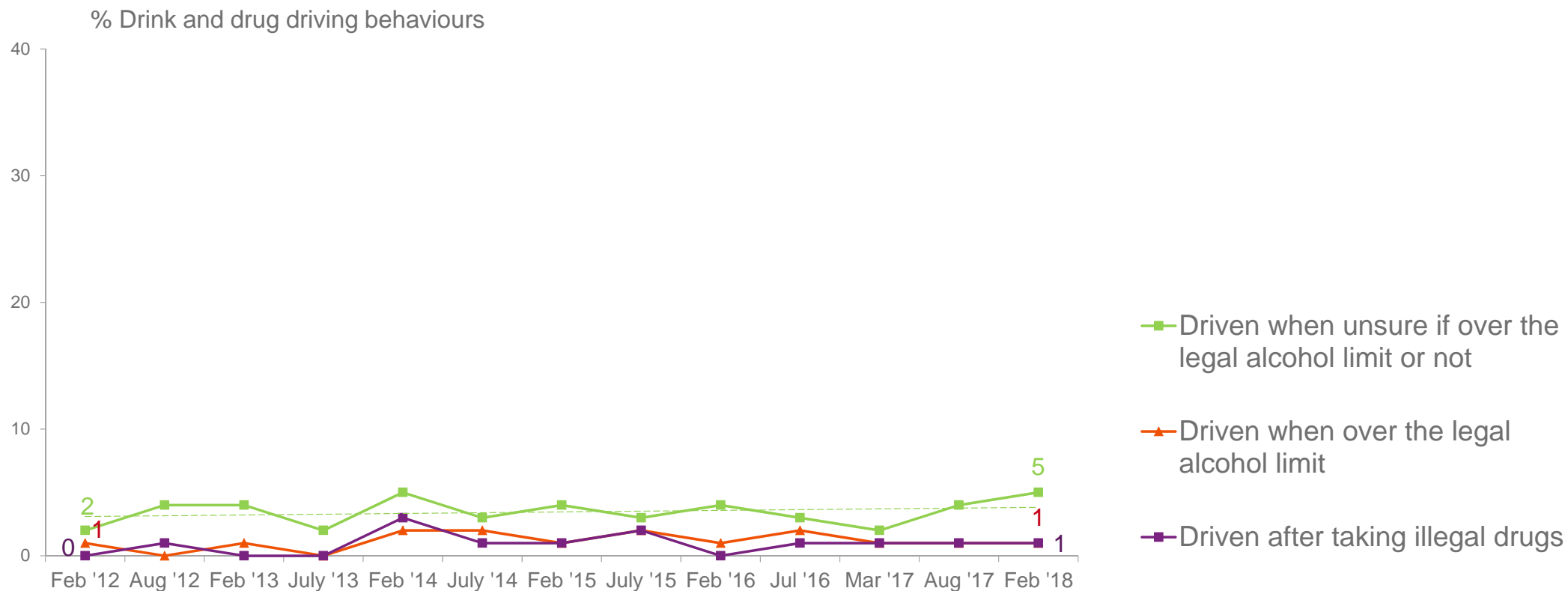
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

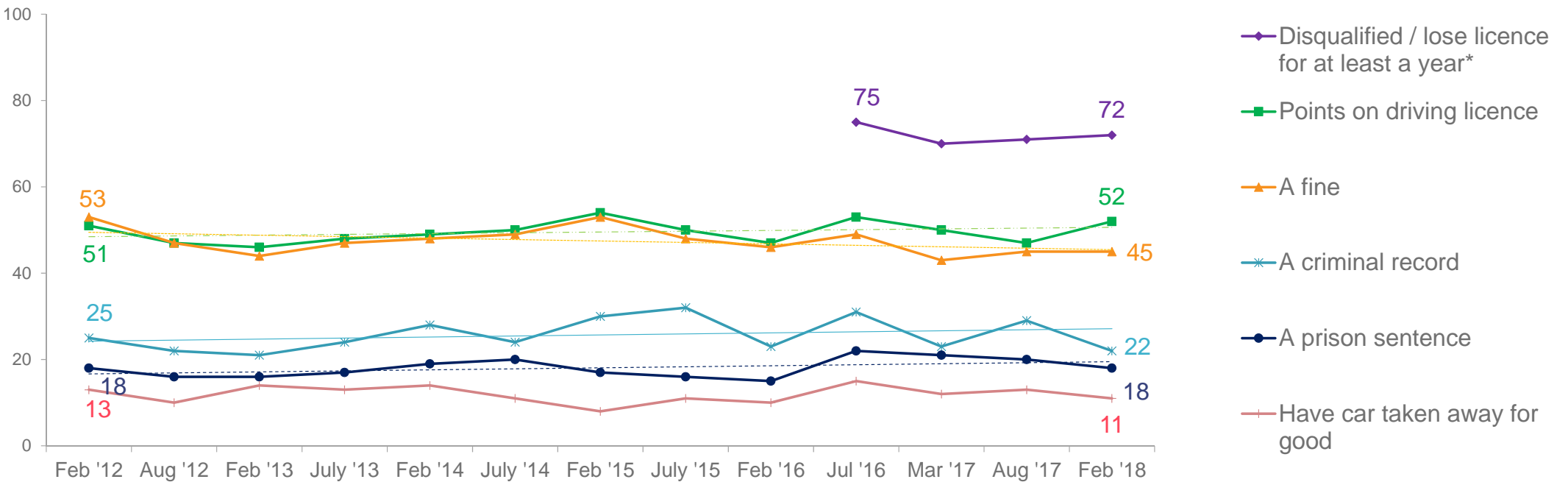
Small increase in those driving when unsure if over the legal alcohol limit or not suggests this needs close monitoring to determine whether there is an upward trend



Base: All who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

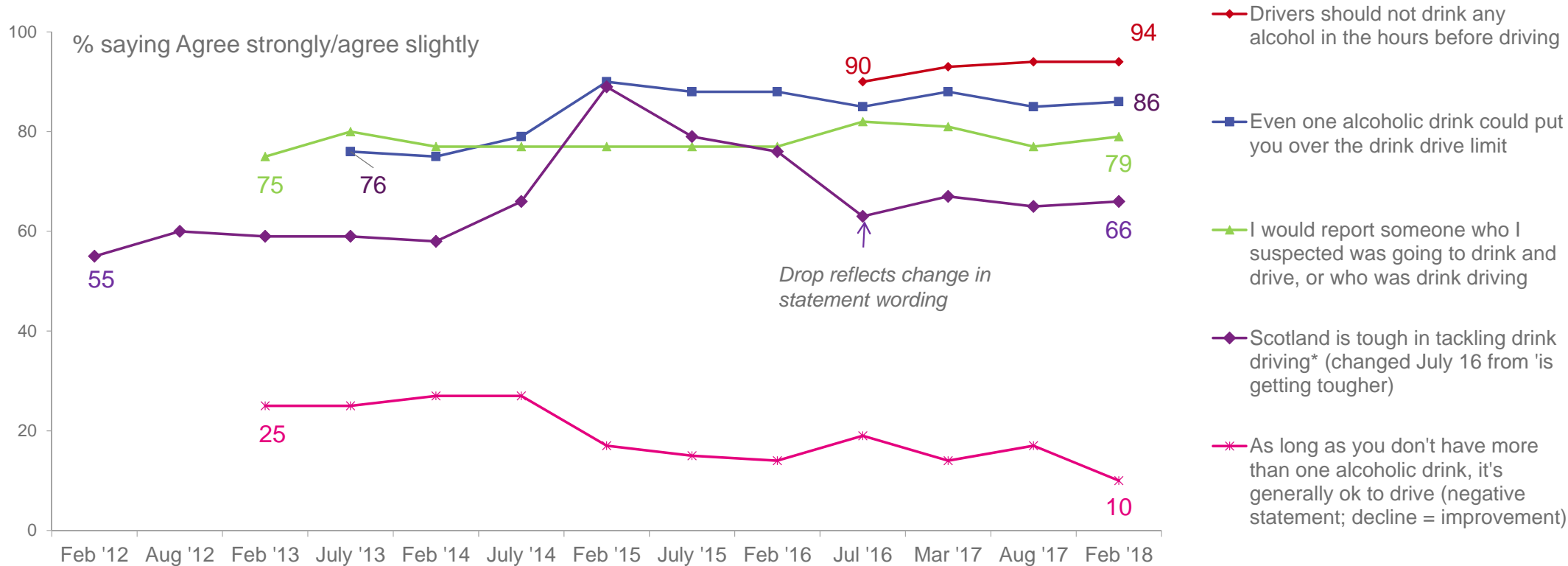
Awareness of most penalties for drink driving have remained fairly constant over last 5 years, with only the penalty of a fine showing signs of decreasing

% aware of penalties for driving over the alcohol limit



Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

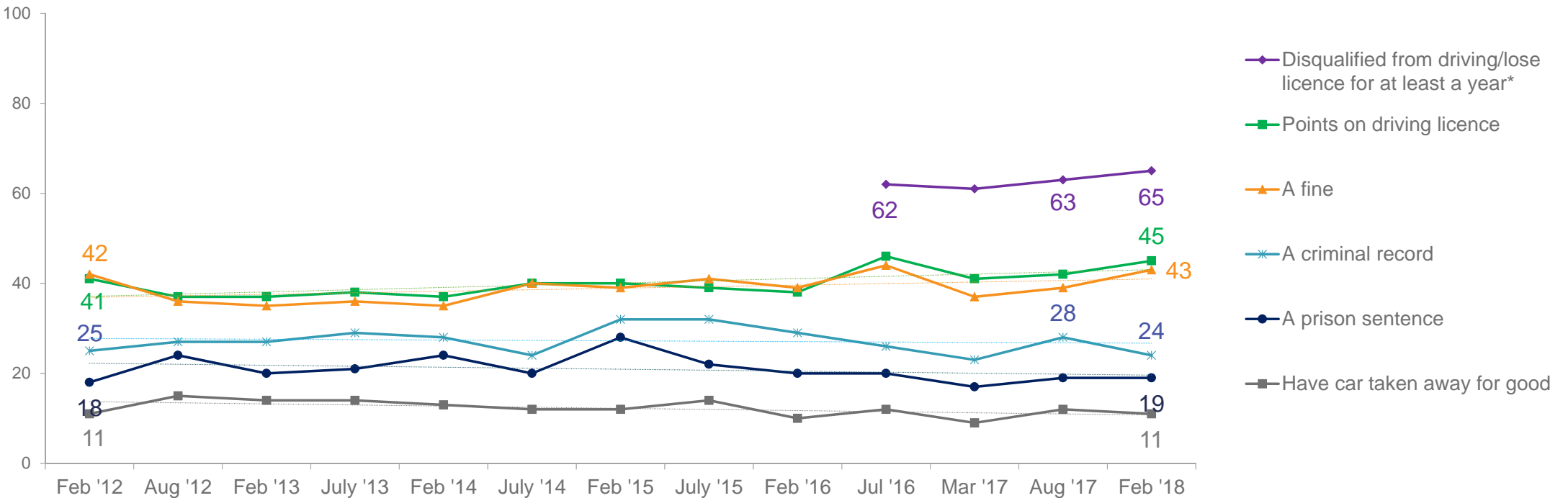
The decline in the acceptability of driving after one alcoholic drink and rise in those against drinking before driving indicate views towards drink driving continue to harden



Base: All who hold a full driving licence for a car and drive nowadays
 Q4: How much do you agree or disagree that ...?

Over longer term, awareness of points and a fine are increasing whereas awareness of harsher penalties remains fairly stable. Disqualification is the exception, although as a relatively new measure it's too early to highlight this as a trend

% aware of penalties for drug driving

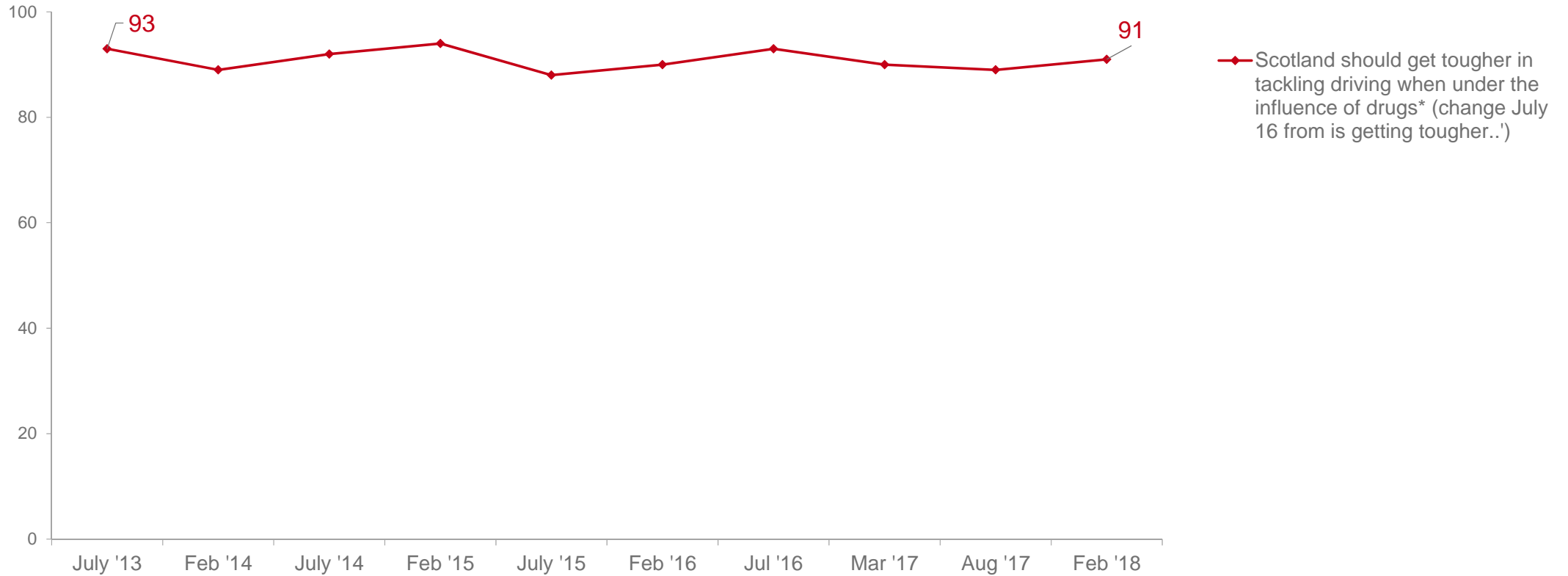


* Added in July'16

Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

Support for Scotland to take a tougher stance on drug driving continues at a high level

% saying agree strongly/agree slightly – drug driving

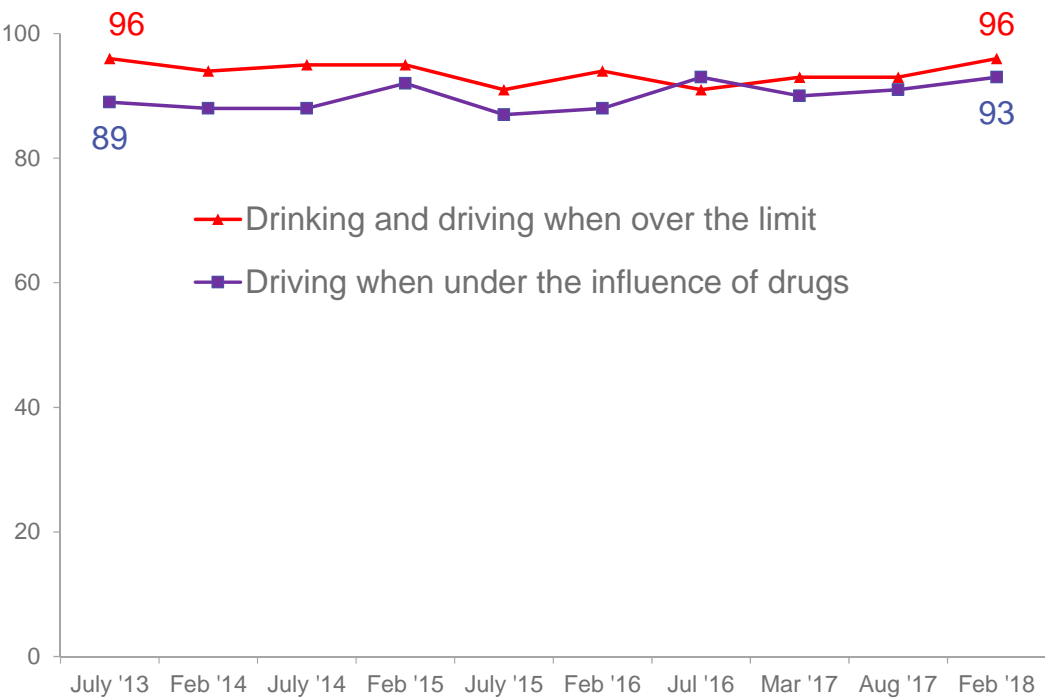


— Scotland should get tougher in tackling driving when under the influence of drugs* (change July 16 from is getting tougher..')

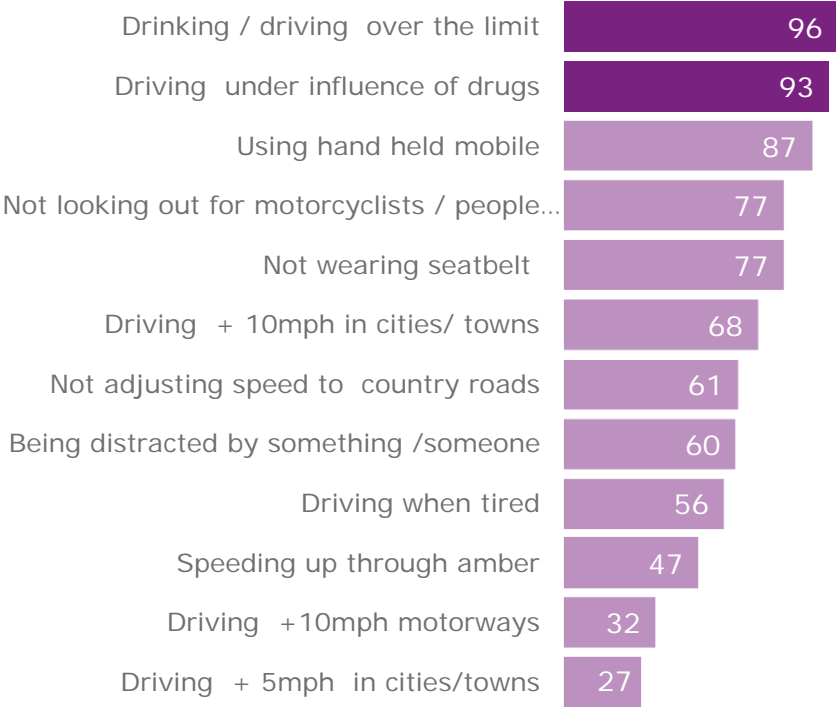
Base: All who hold a full driving licence for a car and drive nowadays
Q4: How much do you agree or disagree that ...?

Drink driving and driving under the influence of drugs are considered to be the most serious risk behaviours, with evidence of attitudes towards the latter hardening further

% rating drink/drug behaviours as 'very serious'



% rating 'very serious' across all behaviours in February 18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

Summary

- The small increase in those driving when unsure if over the legal alcohol limit or not suggests this needs close monitoring to determine whether there is an upward trend
- Awareness of most penalties for drink driving have remained fairly constant over last 5 years, with only the penalty of a fine showing signs of decreasing
- The decline in the acceptability of driving after one alcoholic drink and the increase in those against drinking before driving indicate views towards drink driving continue to harden
- Over longer term, awareness of points and a fine are increasing whereas awareness of harsher penalties remains fairly stable. Disqualification is the exception, although as a relatively new measure it's too early to highlight this as a trend
- Support for Scotland to take a tougher stance on drug driving continues at a high level
- Drink driving and driving under the influence of drugs are considered to be the most serious risk behaviours, with evidence of this view of the latter hardening further

4

Mobile phone usage

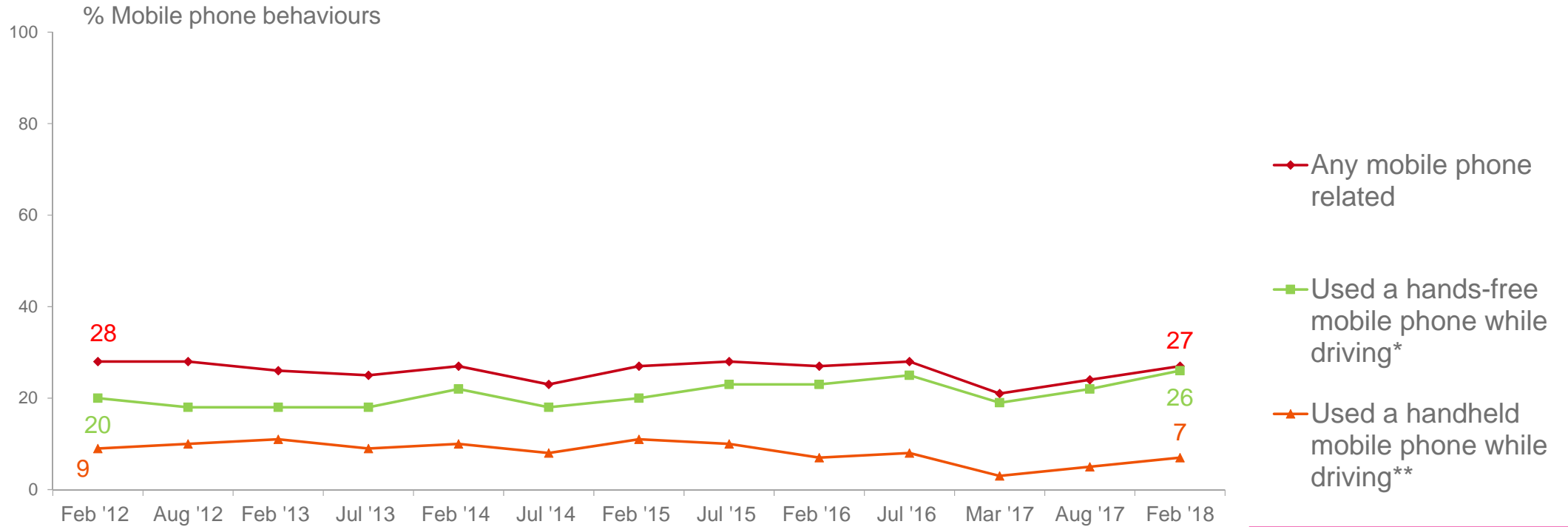
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

Usage of mobile phones has almost reverted back to previous levels, following noticeable dip when the new 6 point penalty legislation was introduced in March '17

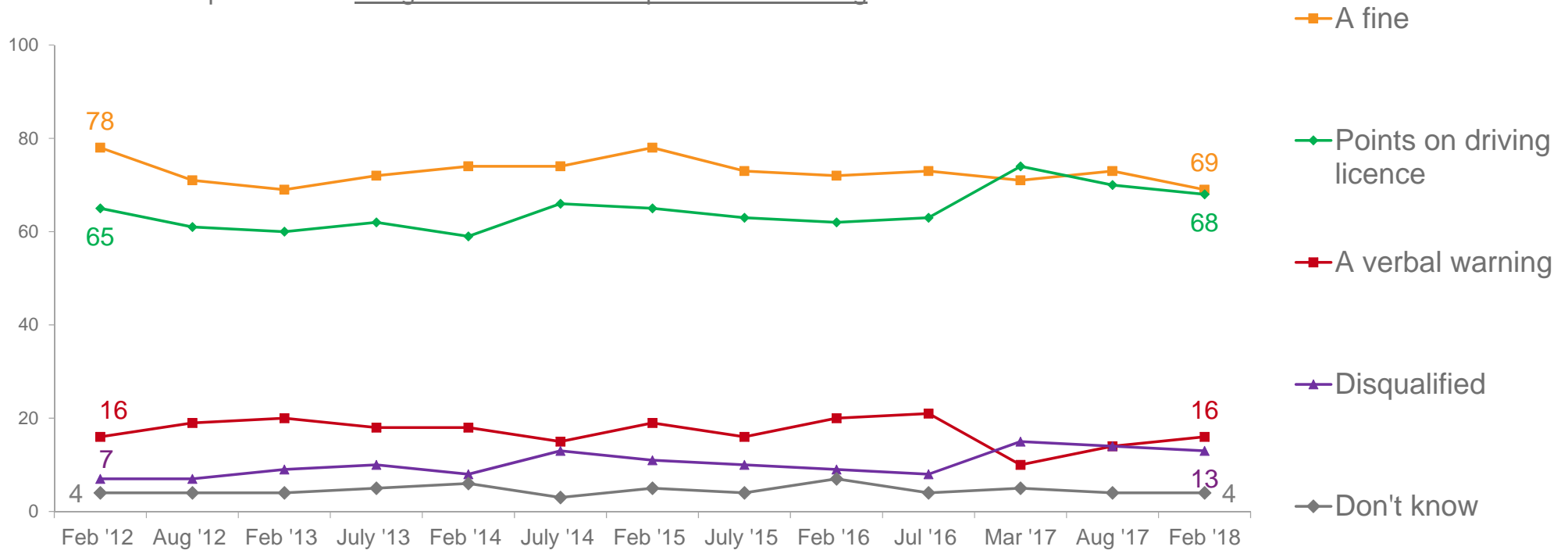


Base: All who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

* Wording changes in July '16 from 'used a hands-free kit'
 ** Wording change in July '16 from 'to call, text or email while driving'

Change in legislation in March '17 produced a spike in awareness of points and disqualification, whereas these now show signs of decline. Conversely reference to a verbal warning has picked up again

% Awareness of penalties for using a hand-held mobile phone when driving

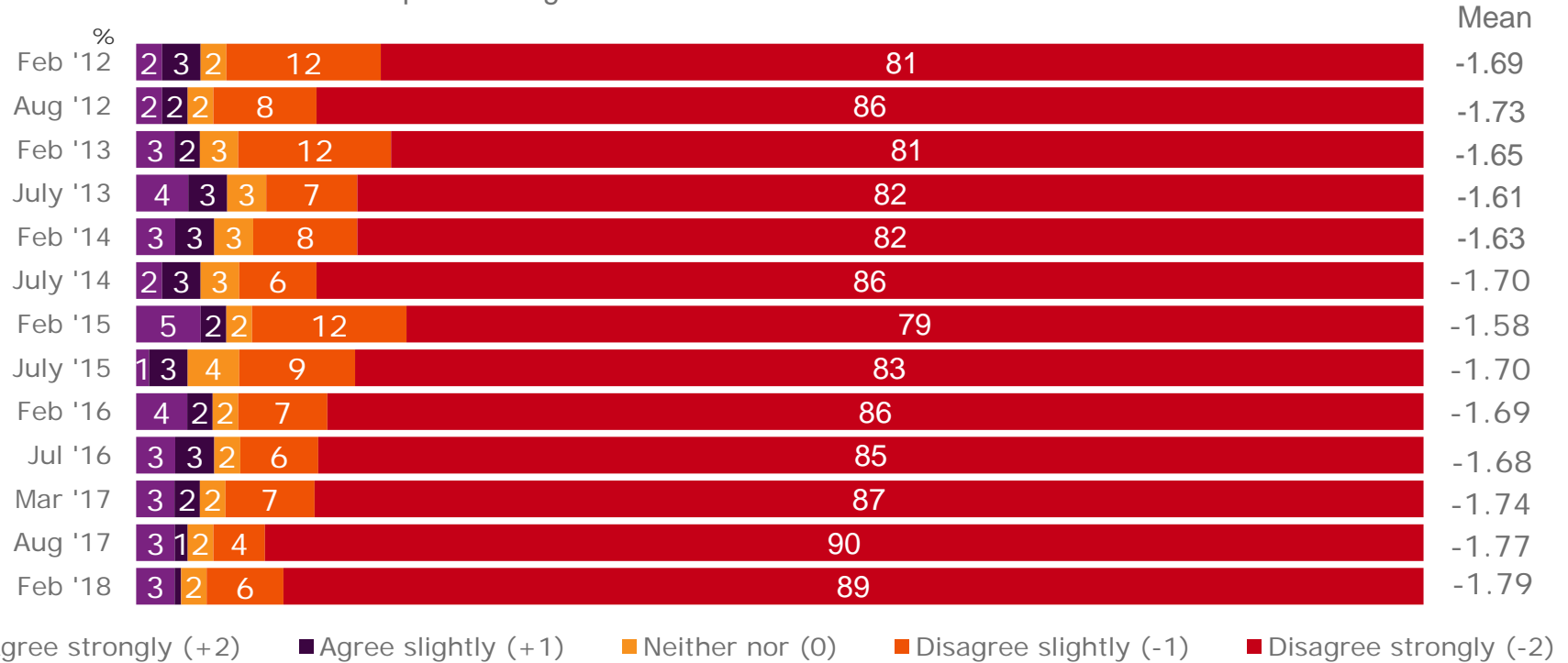


Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

Strong rejection of the acceptability of using of a hand-held mobile remains high, with little evidence of this declining

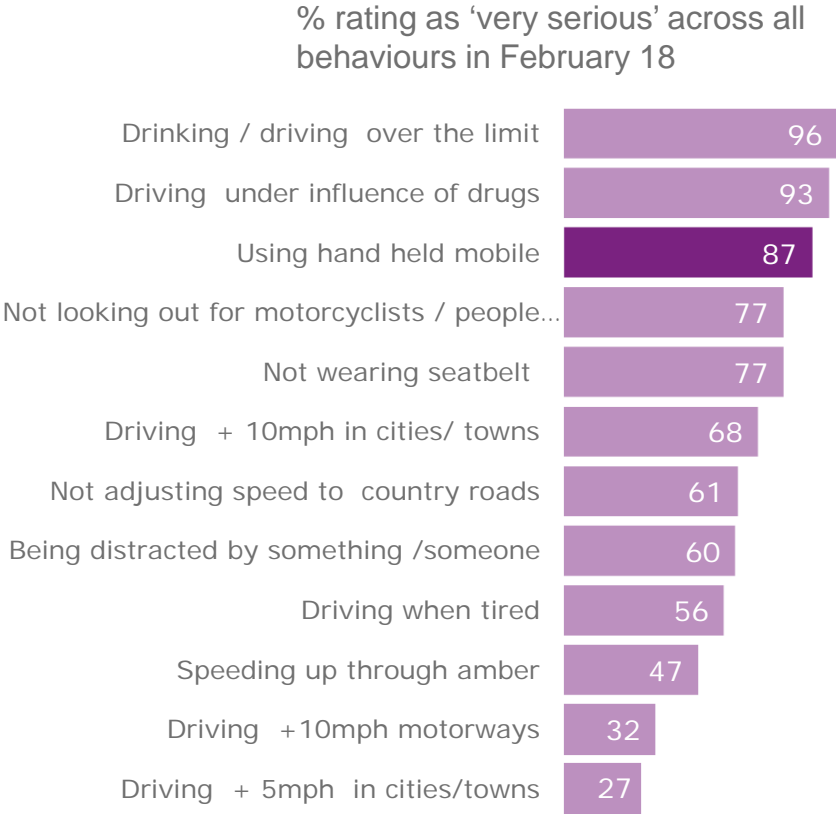
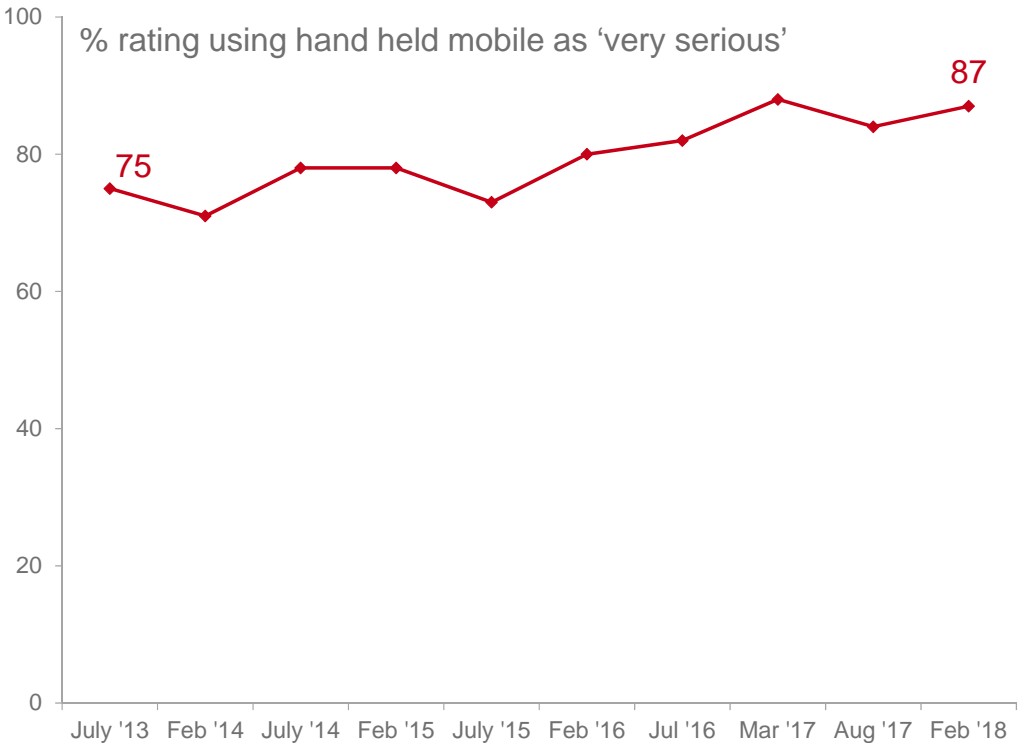
Agreement with statement about mobile phone usage

It's okay to use a hand-held mobile phone when you are driving



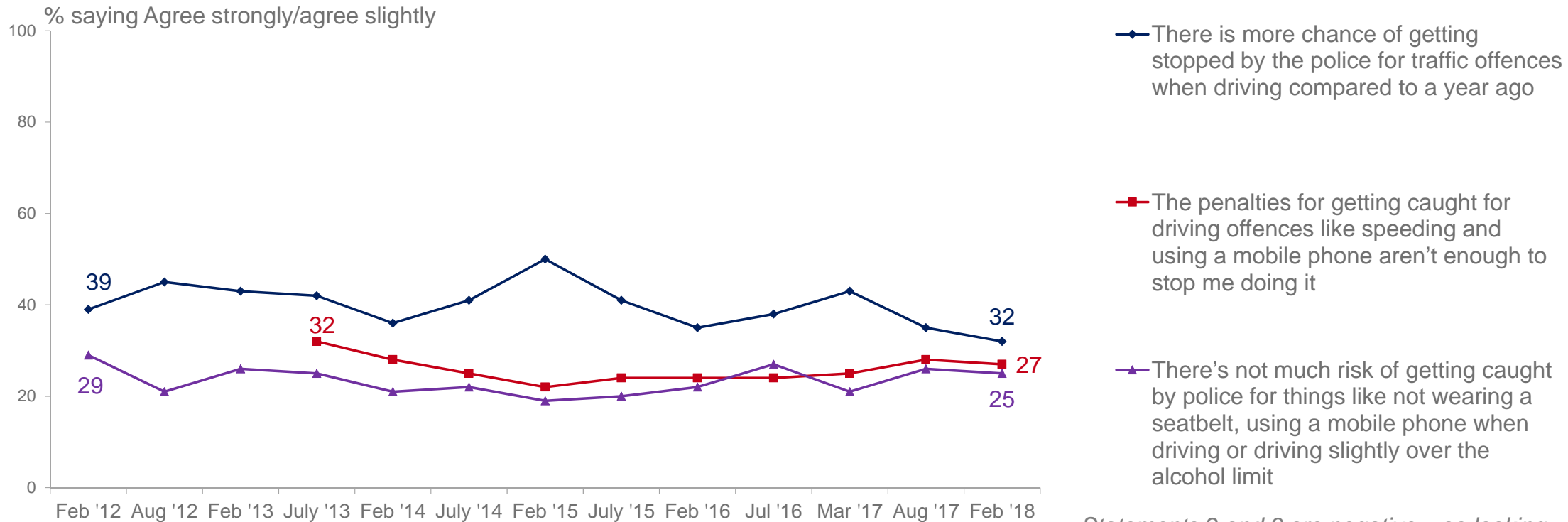
Base: All who hold a full driving licence for a car and drive nowadays at each wave
 Q4: How much do you agree or disagree that.....

The perceived seriousness of the risks of using a hand-held mobile has grown significantly in past 5 years, with no signs yet of this diminishing



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

The perception that you are likely to be stopped by the police fluctuates but overall shows a downward trend. Attitudes towards the impact of penalties and risks of getting caught generally are more stable



Base: All who hold a full driving licence for a car and drive nowadays
 Q4: How much do you agree or disagree that ...?

Statements 2 and 3 are negative – so looking for decline in agreement rather than increase

Summary

- Usage of mobile phones has almost reverted back to previous levels, following noticeable dip when the new 6 point penalty legislation was introduced in March '17
- Change in legislation in March '17 produced a spike in awareness of points and disqualification, whereas these now show signs of decline. Conversely reference to a verbal warning has picked up again
- The strong rejection of the acceptability of using of a hand-held mobile remains high, with little evidence of this declining
- The perceived seriousness of the risks of using a hand-held mobile has grown significantly in past 5 years, with also no signs yet of this diminishing
- The perception that you are likely to be stopped by the police fluctuates but overall shows a downward trend. Attitudes towards the impact of penalties and risks of getting caught generally are more stable

5

Seatbelts

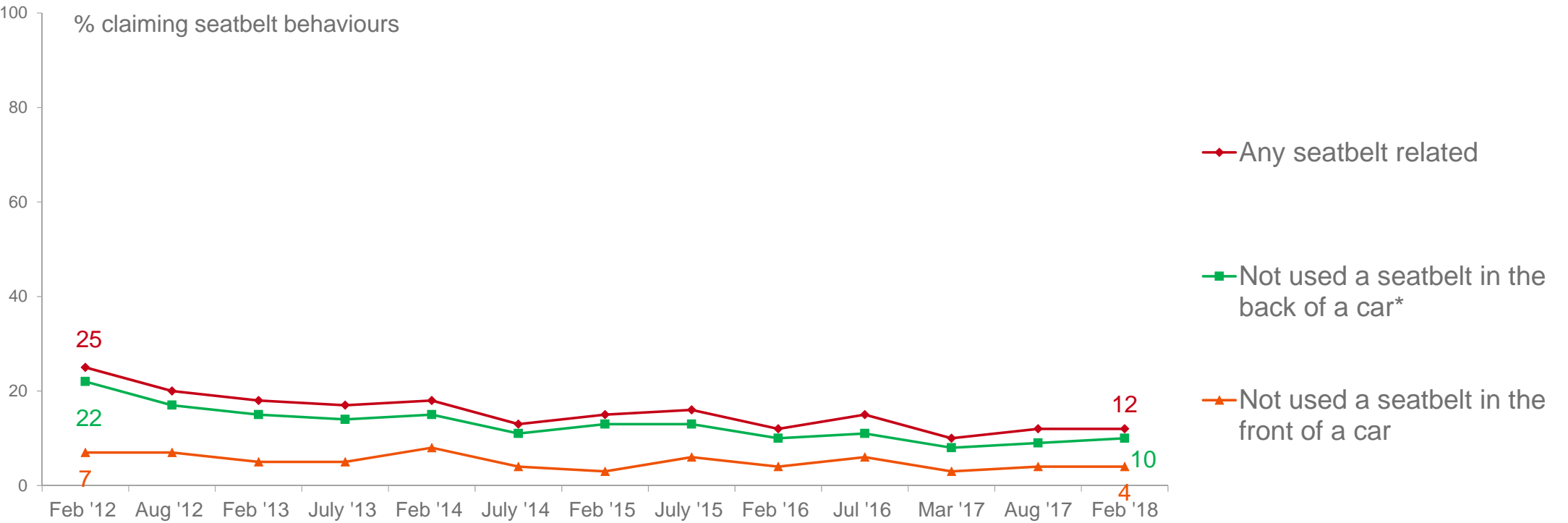
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

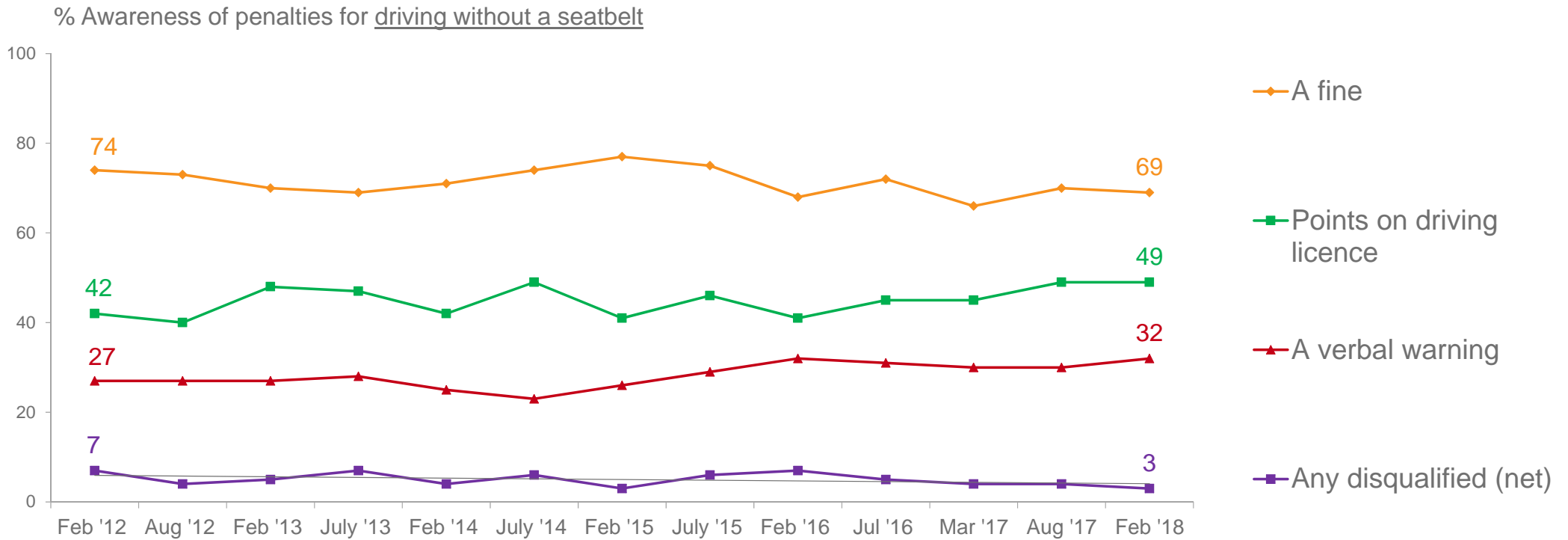
Claimed non-usage of seatbelts has increased marginally in the previous year, although the overall trend is downward



* 'When available' removed in 'in Jul '16

Base: All who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

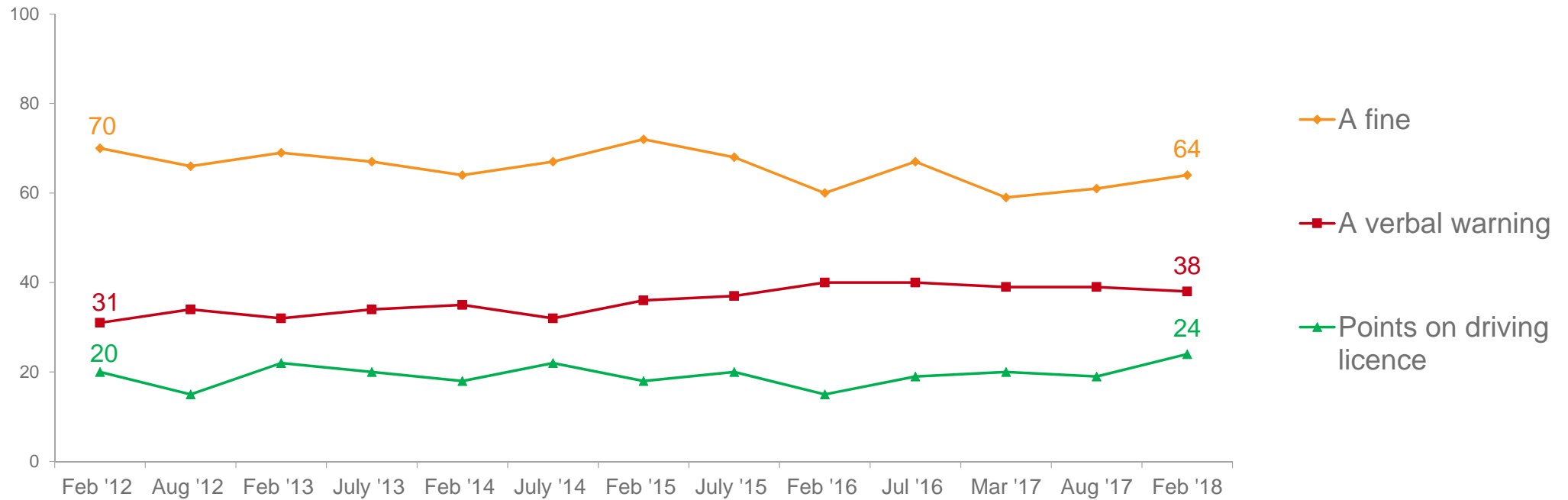
Awareness of points and verbal warnings as penalties for not wearing a seatbelt show signs of increasing, whereas awareness of fine and disqualification are gradually declining



Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

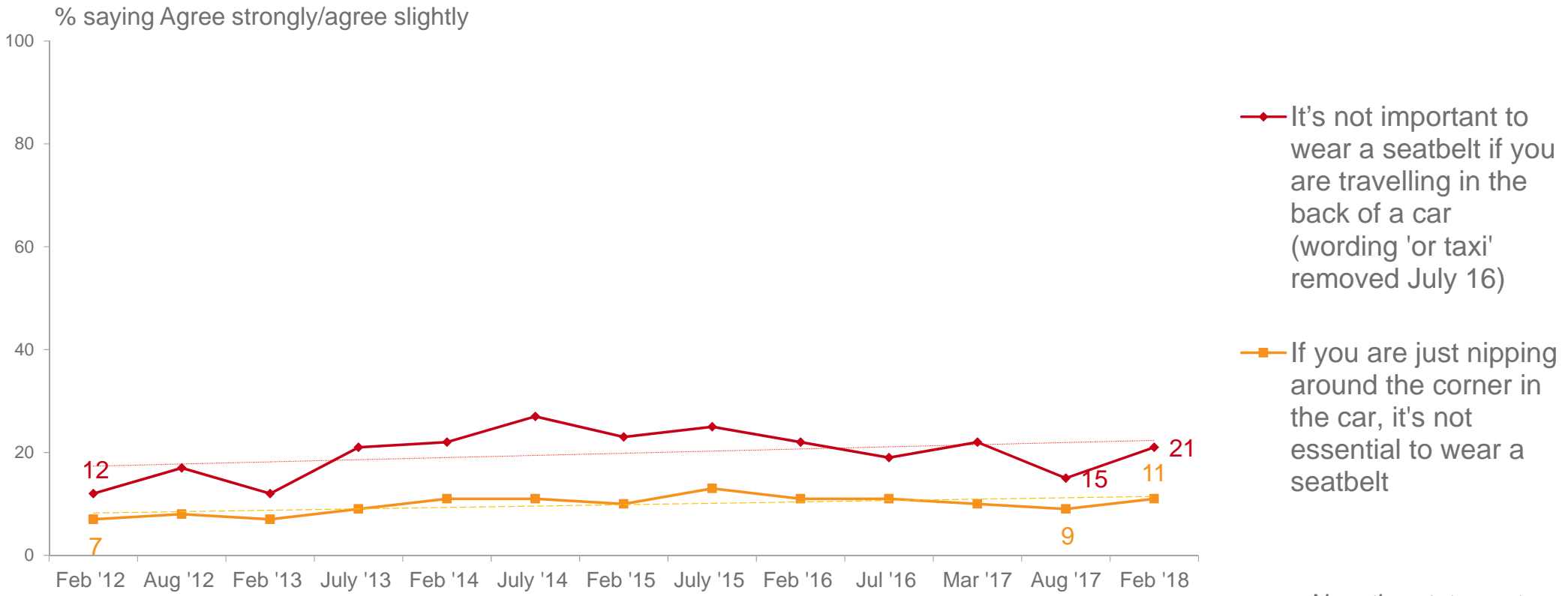
Similarly, awareness of a verbal warning for driving without a seatbelt when travelling as a passenger has seen a steady increase, whereas the shift is downward for those aware of a fine

% Awareness of penalties for travelling as passenger without a seatbelt



Base: All who hold a full driving licence for a car and drive nowadays
Q8: What do you think are the penalties if a person is caught by the police for ...?

The level of acceptability of not wearing a seatbelt in the back, or for short distances, is gradually increasing

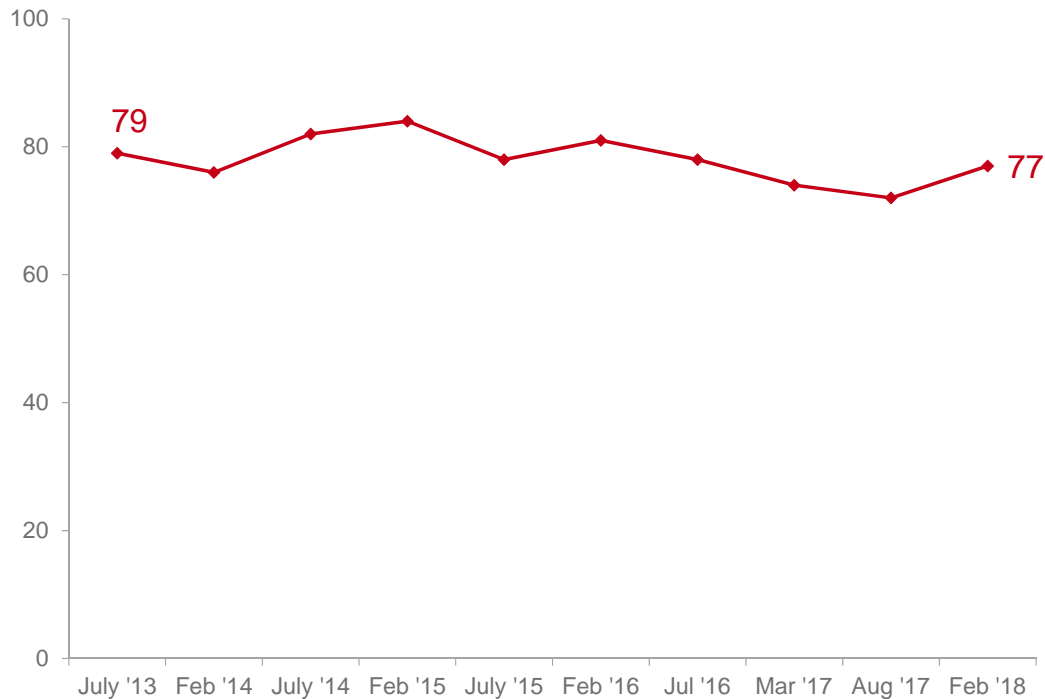


Base: All who hold a full driving licence for a car and drive nowadays
 Q4: How much do you agree or disagree that ...?

Negative statements:
 decrease = improvement

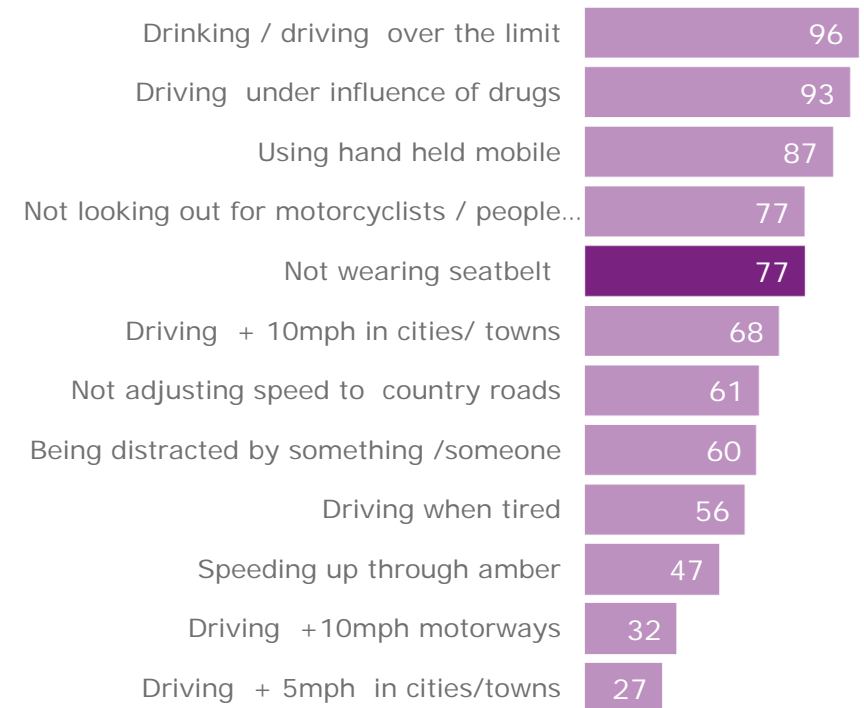
Despite some evidence at latest wave of increased non-compliance, the majority remain convinced that not wearing a seatbelt poses a serious risk and it continues to be ranked as one of the most serious 'risk' actions

% rating non-usage of seatbelt in car as 'very serious'



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

% rating as 'very serious' across all behaviours in February 18



Summary

- Claimed non-usage of seatbelts has increased marginally in the previous year, although the overall trend is downward
- Awareness of points and verbal warnings as penalties for not wearing a seatbelt show signs of increasing, whereas awareness of fine and disqualification are gradually declining
- Similarly, awareness of a verbal warning for driving without a seatbelt when travelling as a passenger has seen a steady increase, whereas the shift is downward for those aware of a fine
- Acceptance of not wearing a seatbelt in the back, or for short distances, is gradually increasing
- Despite this evidence at latest wave of increased non-compliance, the majority remain convinced that not wearing a seatbelt poses a serious risk to safety and it continues to be ranked as one of the most serious 'at risk' actions

6

Vulnerable road users

Behaviours

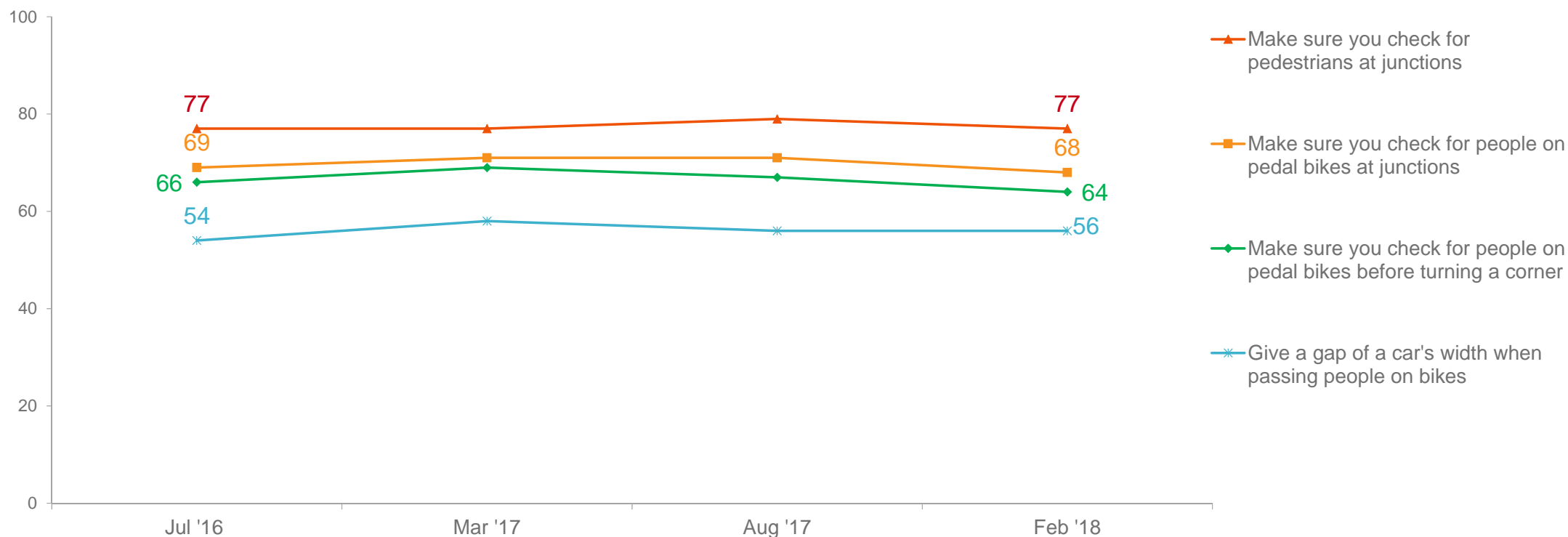
Awareness of penalties

Attitudes

Perceptions of seriousness

Drivers are more likely to consistently check for pedestrians at junctions than for bikes. Drivers always leaving a car's width when passing bikes remains at a relatively low level

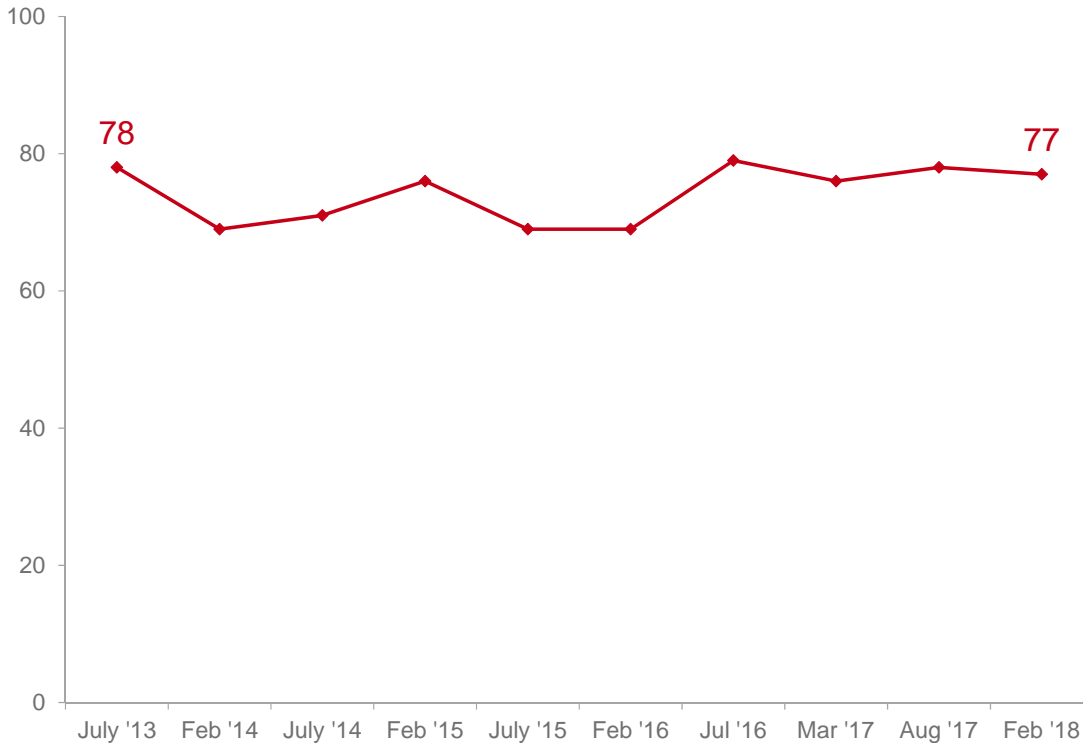
% who always....



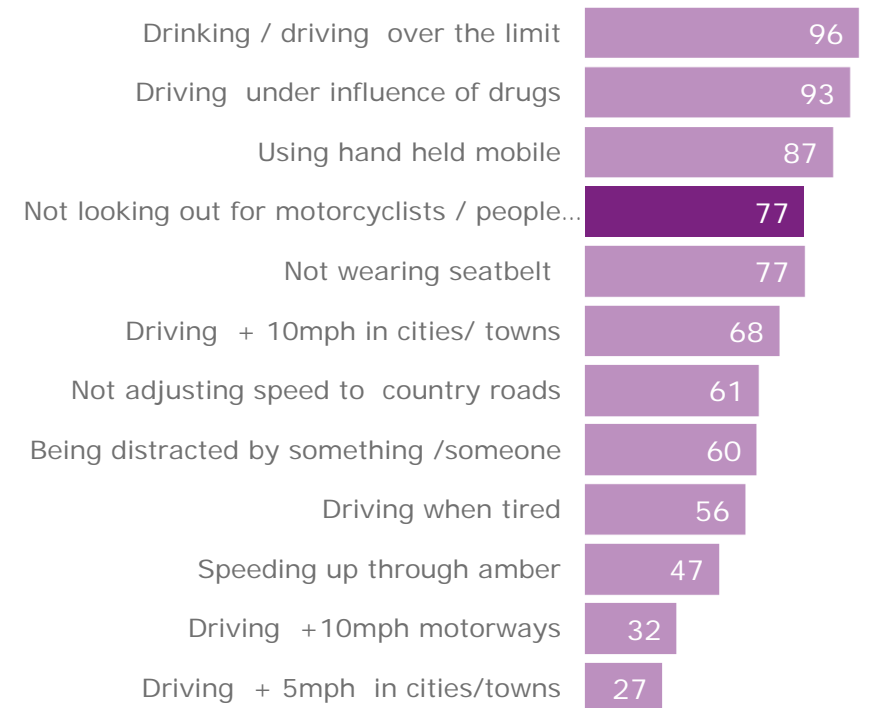
Base: All who hold a full driving licence for a car and drive nowadays; Feb '18 (561)
Q8a: How frequently do you....?

Despite wave on wave fluctuations, the perceived seriousness of not looking out for VRUs at junctions remains high and shows no signs of decreasing

% rating **not** looking out for motorcyclists/people on bikes at junctions as 'very serious'



% rating as 'very serious' across all behaviours in February 18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

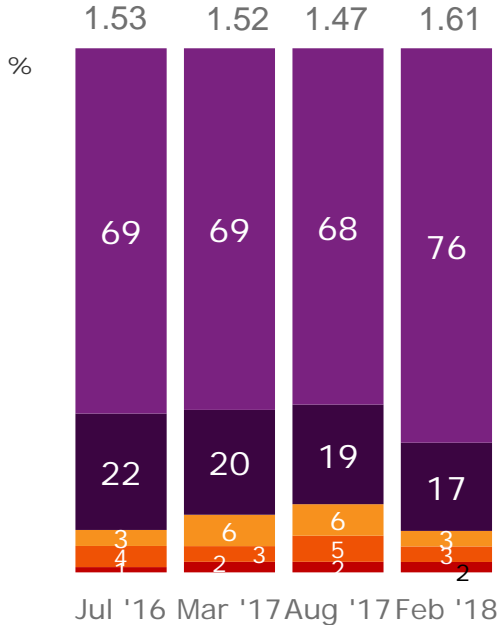
Latest wave indicates increased consensus that people on bikes should be given a car's width when passing, and less agreement that pedestrians too often use unofficial points for crossing roads.

% saying agree/ disagree

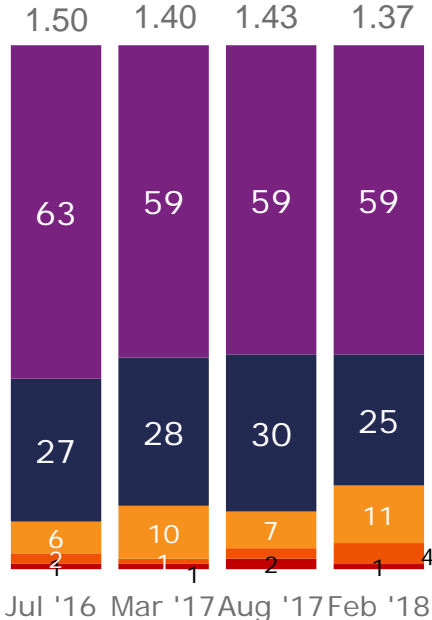
Drivers should give people on pedal bikes a full car's width when passing

Mean:

- Agree strongly (+2)
- Agree slightly (+1)
- Neither nor (0)
- Disagree slightly (-1)
- Disagree strongly (-2)

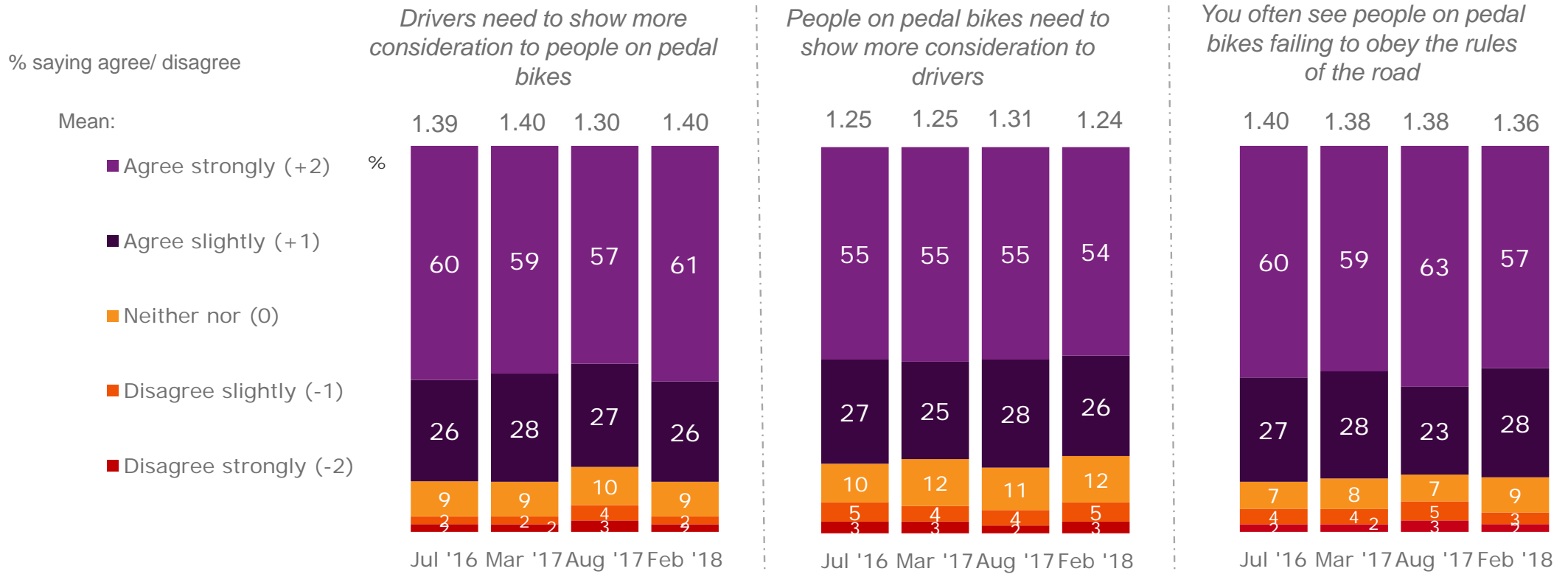


Too often pedestrians cross where they like rather than using crossing points e.g. zebra or pelican crossings



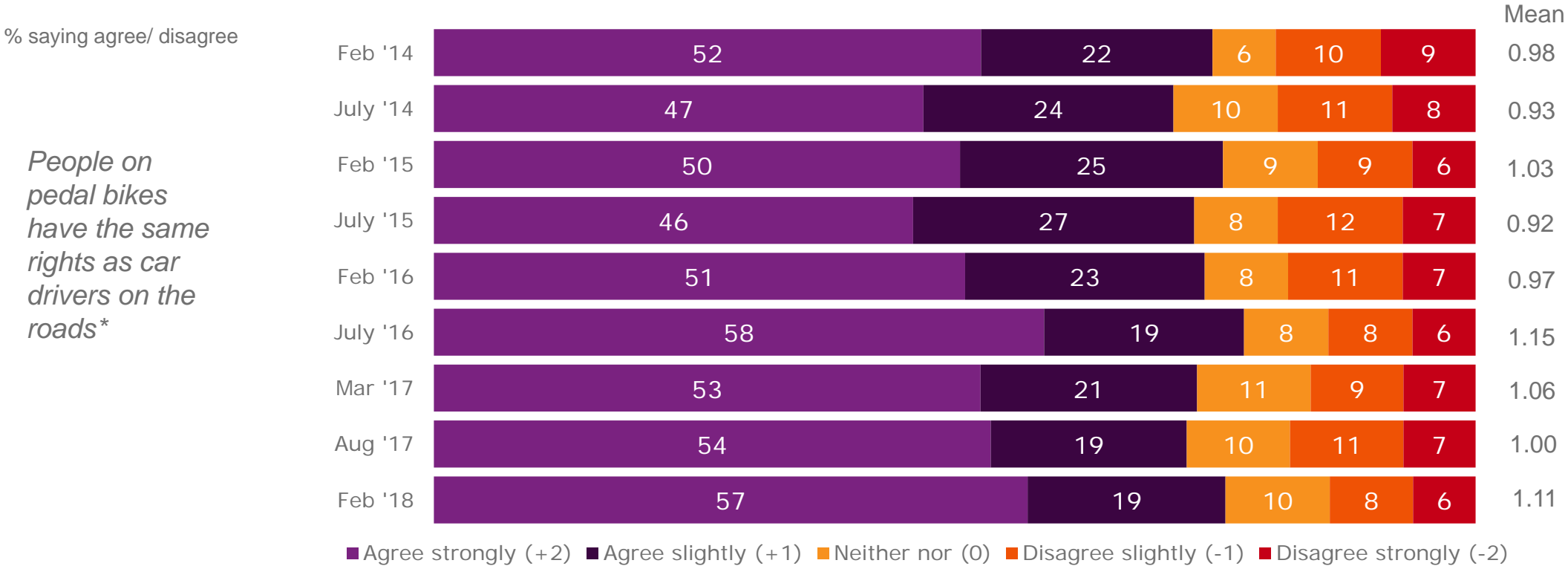
Base: All who hold a full driving licence for a car and drive nowadays at each wave
 Q4b: How much do you agree or disagree that.....

There are no clear trends on these issues: support for greater consideration among drivers for those on bikes, and among people on bikes for drivers, remains widespread and strong



Base: All who hold a full driving licence for a car and drive nowadays at each wave
 Q4b: How much do you agree or disagree that.....

Strong commitment towards people on bikes having same rights as drivers shows signs of gradually increasing. Nevertheless a significant core continue to disagree with this view



Base: All who hold a full driving licence for a car and drive nowadays at each wave
 Q4b: How much do you agree or disagree that.....

**Wording change in July 2016. 'Cyclists' replaced with 'People on pedal bikes'*

Summary

- Drivers are more likely to consistently check for pedestrians at junctions than for bikes. Always leaving a car's width when passing bikes remains at a relatively low level
- Despite wave on wave fluctuations, the perceived seriousness of not looking out for VRUs at junctions remains high and shows no signs of decreasing
- Despite not necessarily complying, the findings from the latest wave indicate there is an increased consensus among drivers that people on bikes should be given a car's width when passing, and less agreement that pedestrians too often use unofficial points for crossing roads
- Support for greater consideration among drivers for people on bikes, and among people on bikes for drivers, remains widespread and strong
- Strong commitment towards people on bikes having the same rights as drivers shows signs of gradually increasing. Nevertheless, a significant core continue to disagree that cyclists have the same rights as drivers.

7

Distraction/Health/Age

Claimed behaviours

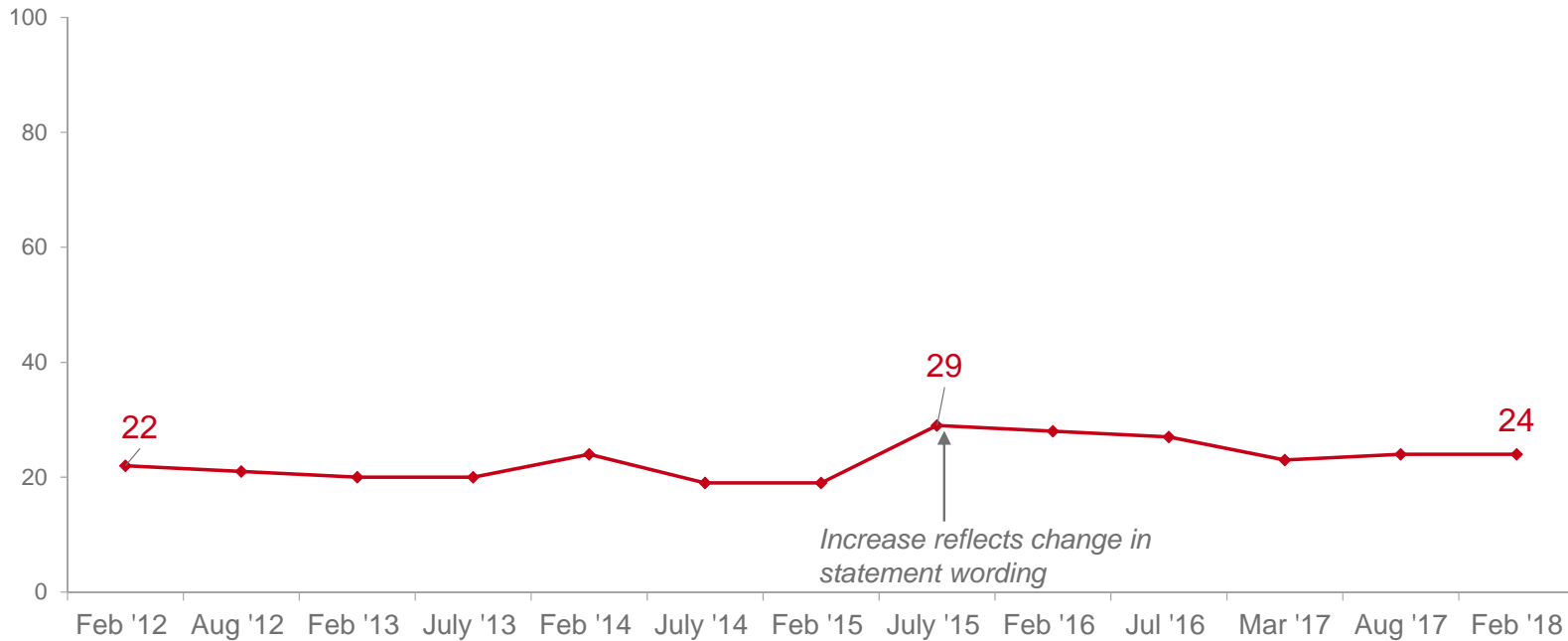
Awareness of penalties

Attitudes

Perceptions of seriousness

Since the spike caused by a change in wording there has been a slight drop in those claiming to drive when tired/sleepy

% claiming to drive when feeling tired or sleepy

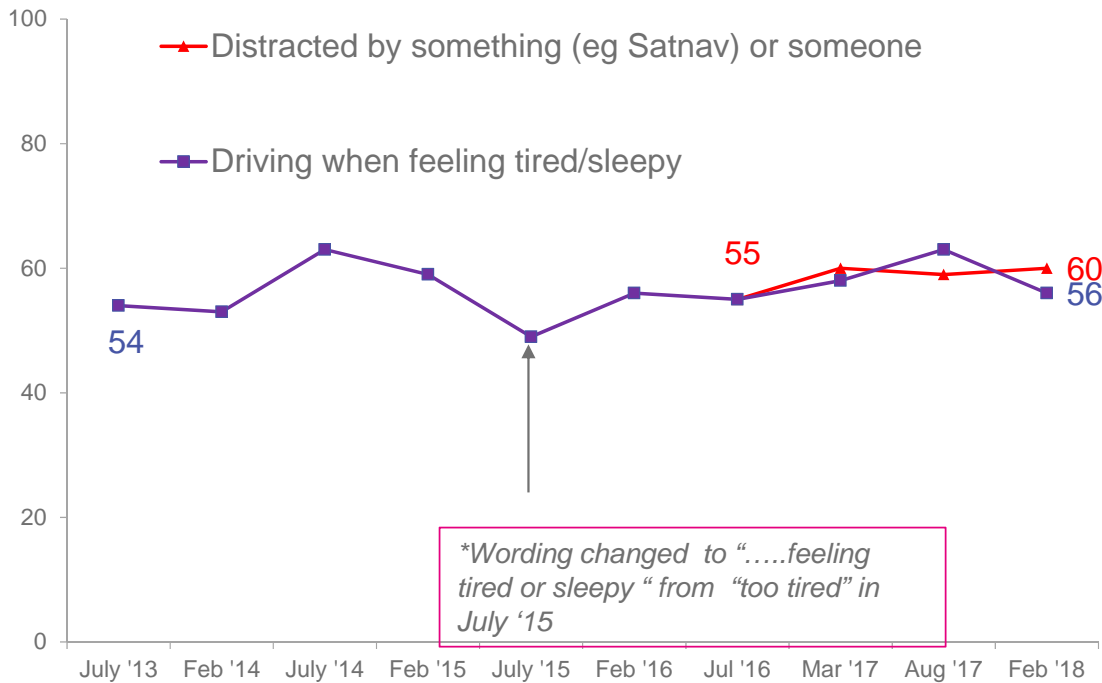


**Wording changed to “.....feeling tired or sleepy “ from “too tired” in July ‘15*

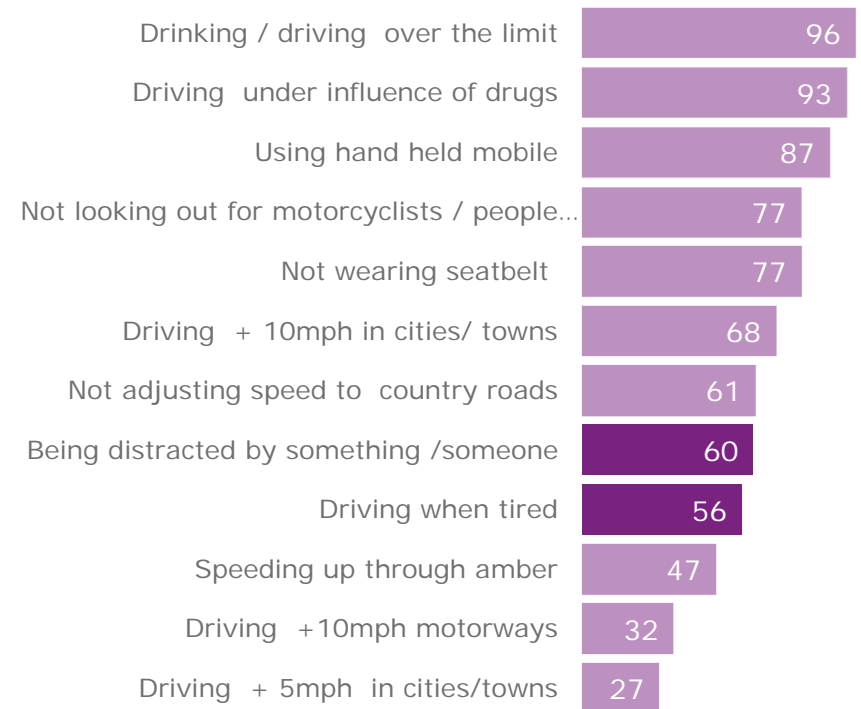
Base: All who hold a full driving licence for a car and drive nowadays
Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

Driver distraction is considered a fairly low level risk compared to many others, although early signs suggest perceived seriousness is growing. Concern about risks of fatigue are relatively stable

% rating being distracted by something/being tired as very serious

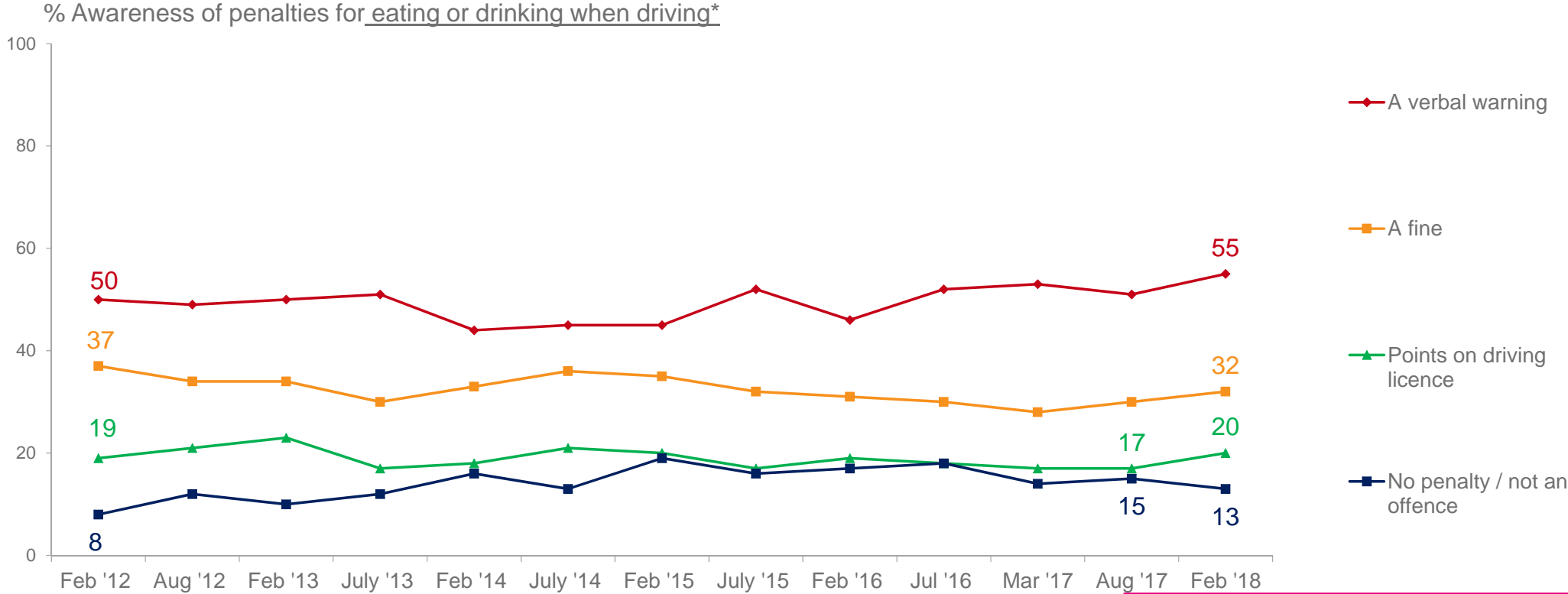


% rating as 'very serious' across all behaviours in February 18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (561 at Wave 16)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

Reference to a verbal warning continues to increase but following a period of decline reference to a fine and points have also picked up in the last two waves. The percentage claiming it is not an offence remains broadly stable

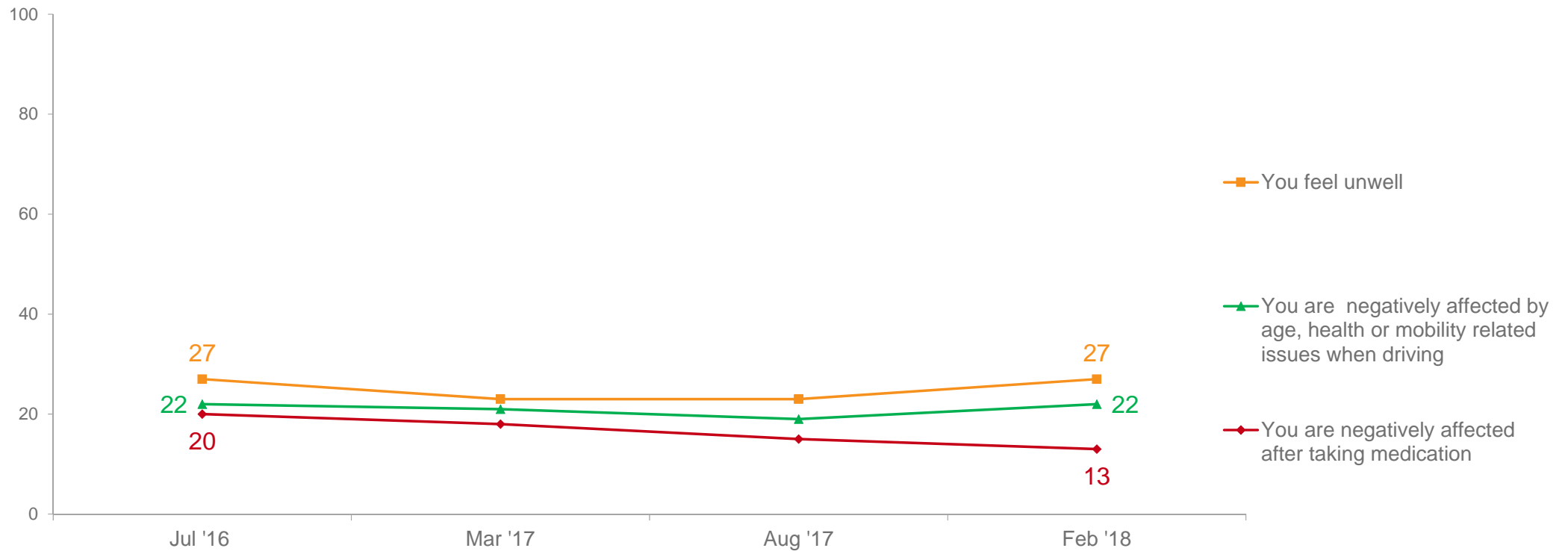


Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

*Changed from 'drinking from a bottle, can or cup of soft drink when driving' in Jul '16

Since monitoring started, the proportion claiming to feel their driving is negatively affected after taking medication has seen a positive decline but there has been no corresponding improvement on the other risk behaviours

% who always/occasionally drive when.....



Base: All who hold a full driving licence for a car and drive nowadays; Feb '18 (561)
Q8a: How frequently do you....?

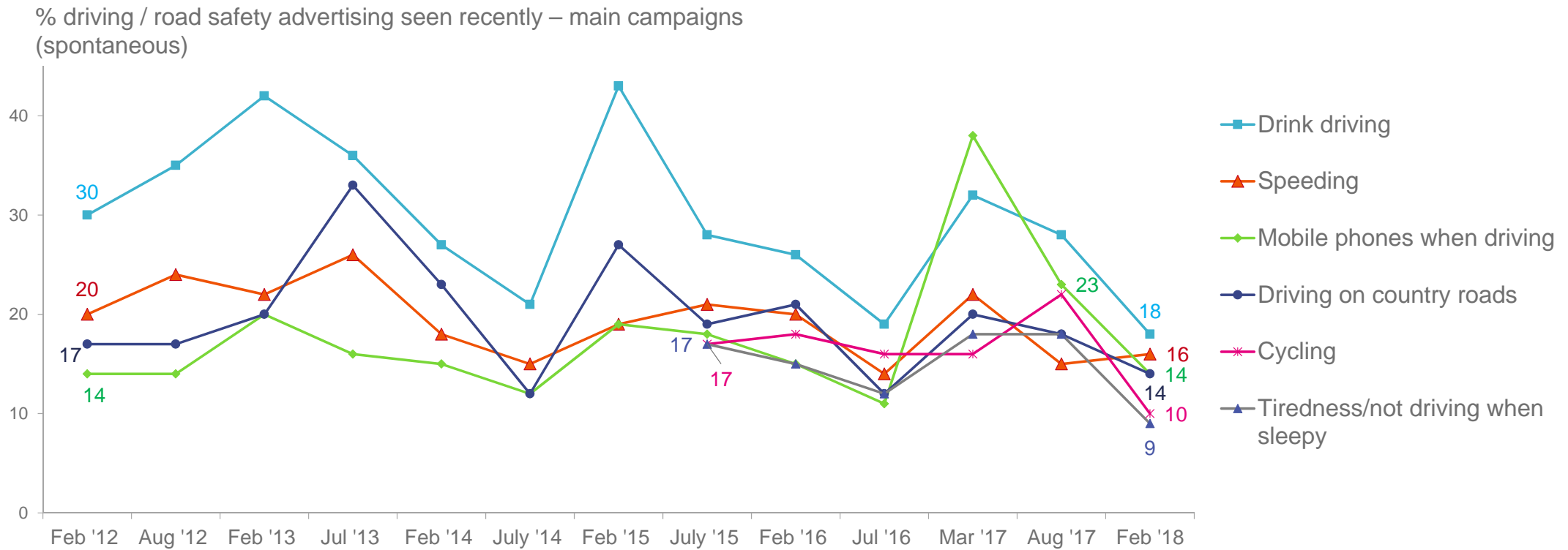
Summary

- Since the spike caused by a change in wording there has been a slight drop in those claiming to drive when tired/sleepy
- Driver distraction is considered a fairly low level risk compared to many others, although early signs suggest perceived seriousness is growing. Concern about risks of fatigue are relatively stable
- Reference to a verbal warning continues to increase but following a period of decline reference to a fine and points have also picked up in the last two waves. The percentage claiming it is not an offence remains broadly stable
- Since monitoring started, the proportion claiming to feel their driving is negatively affected after taking medication has seen a positive decline but there has been no corresponding improvement on the other risk behaviours

8

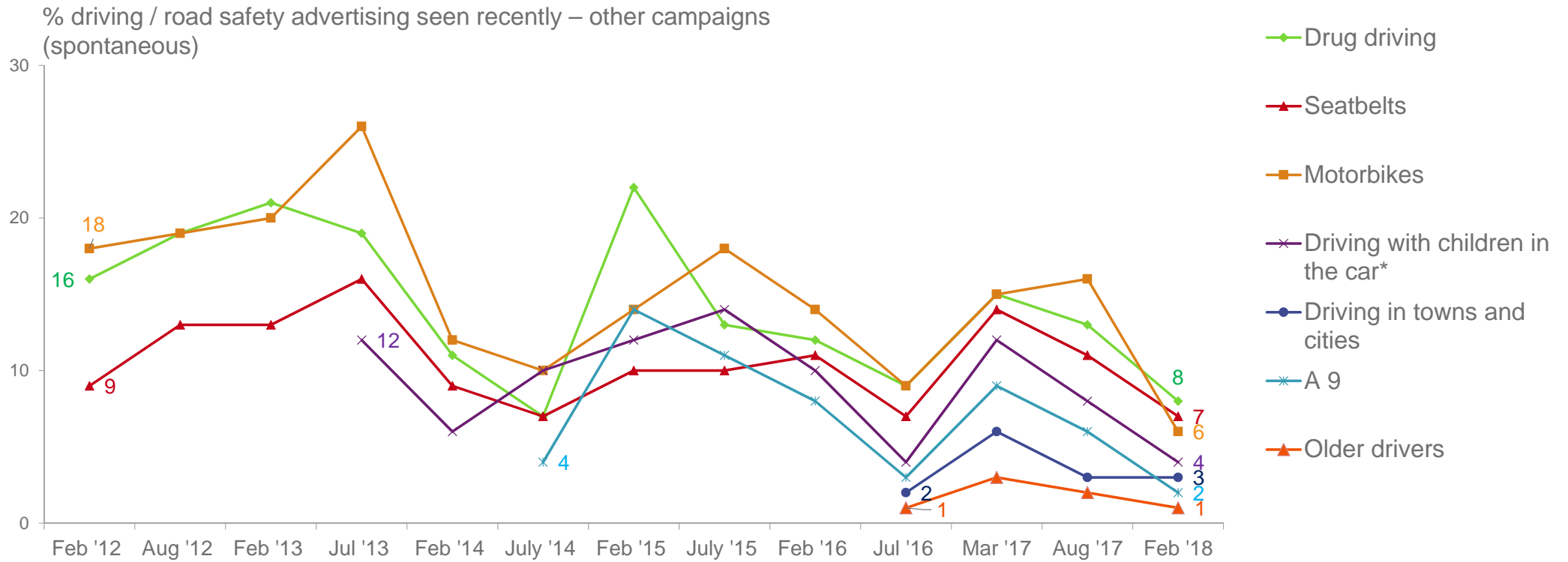
Advertising and marketing awareness

Compared to the high levels recorded in March '17, especially for mobile phones, all topics are less top of mind at latest wave



Base: All who hold a full driving licence for a car and drive nowadays
 Q10: Have you seen or heard any advertising or marketing on topics relating to driving or road safety recently? On what topics?

A similar pattern is evident with respect to spontaneous awareness of these 'smaller' campaigns, with nearly all topics recalled to a lesser extent at latest wave – in line with other periods of relative marketing inactivity



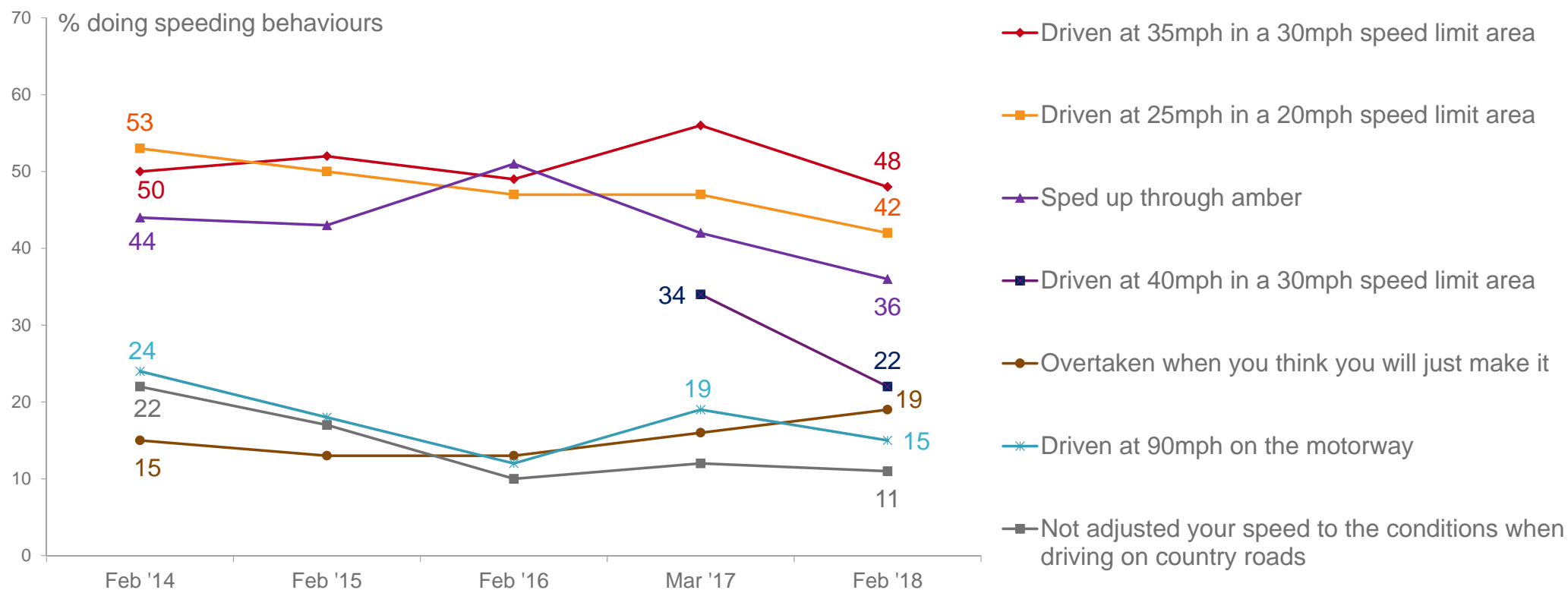
*Amended wording in July '15

Base: All who hold a full driving licence for a car and drive nowadays
 Q10: Have you seen or heard any advertising or marketing on topics relating to driving or road safety recently? On what topics?

9

YOUNG DRIVERS

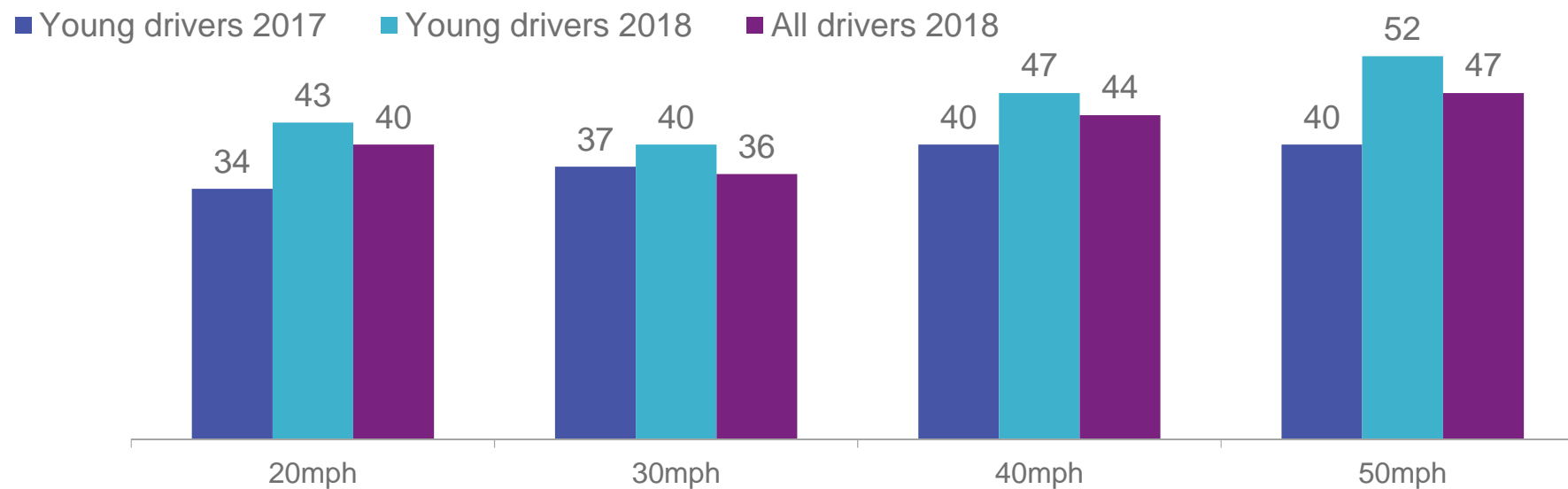
The majority of speeding behaviours saw a decrease in 2018, with driving at 25mph in 20mph area showing the clearest downward trend



Base: All young drivers (17- 25) who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

The claimed adherence levels for all speed limits are now higher among young drivers than among drivers generally

% Always keeping to speed limits....



Base: All who hold a full driving licence for a car and drive nowadays; Feb '18 (xxx/xxx)
Q8a: How frequently do you....?

Attitudes towards driving on country roads have been broadly consistent since 2014, with no evidence of views either strengthening or weakening. Overall the consensus is for drivers to continually adjust their speed on country roads but less so for maximum speed limits to be lowered

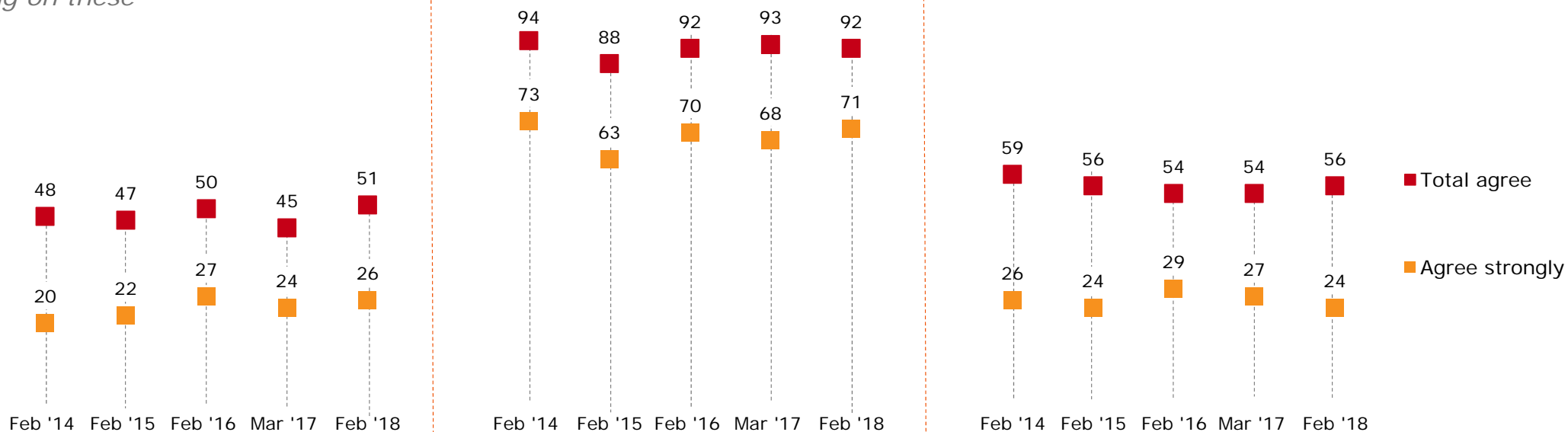
Agreement with statements among 17-25 year olds

There should be a maximum speed limit of 50mph on all country roads because of the greater risks when driving on these

You should continually adjust your speed when driving on country roads to allow for changeable conditions

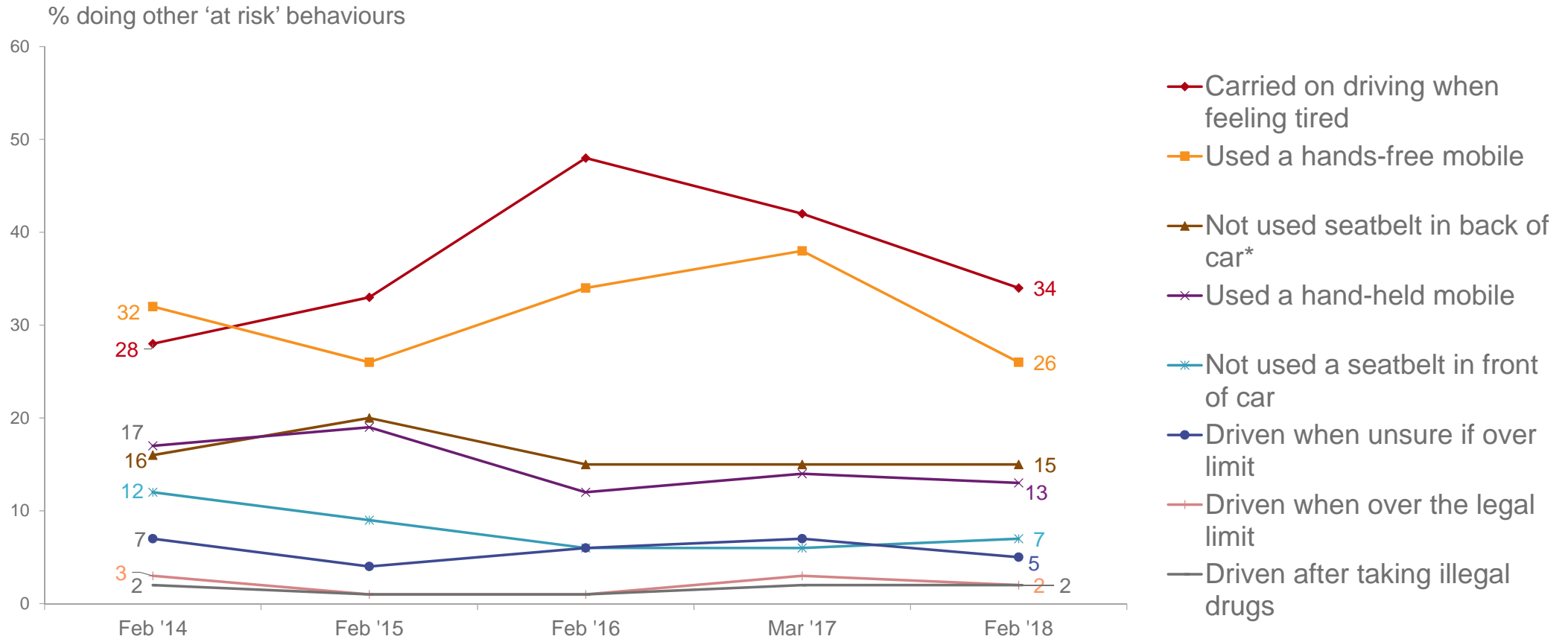
More fatal accidents in Scotland happen on country roads than on any other type of road

%



Base: All 17-25s who hold a full driving licence for a car and drive nowadays at each wave
 Q4: How much do you agree or disagree that.....

In context of stable levels for other 'at risk' behaviours, driving when tired and usage of a hands-free mobile have both recorded a notable decline in 2018

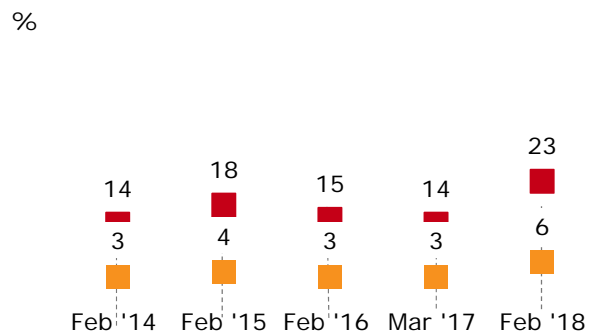


Base: All young drivers (17- 25) who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

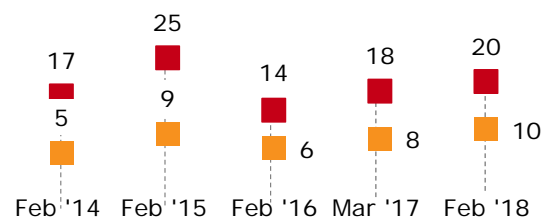
Despite fluctuations in perceptions that there is a greater likelihood this year of being caught, the overall trend appears upward. However, agreement that the police will not catch drivers is slightly higher than previously recorded

Agreement with statements among 17-25 year olds

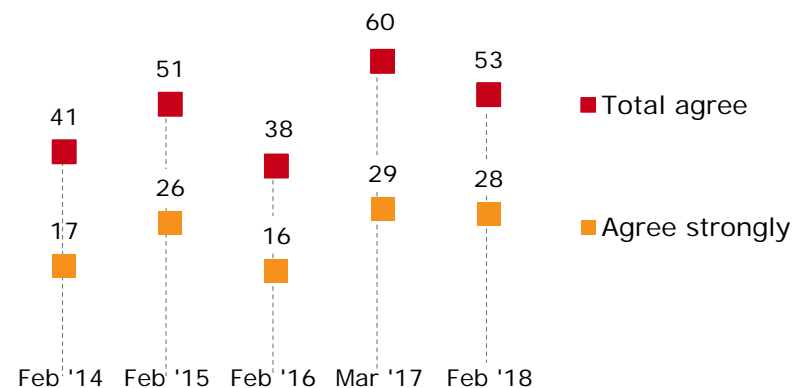
There's not much risk of getting caught by police for things like not wearing a seatbelt, using a mobile phone when driving or driving slightly over the alcohol limit



Penalties for getting caught for driving offences like speeding and using a mobile phone aren't enough to stop me doing it



There is more chance of getting stopped by the police for traffic offences when driving compared to a year ago

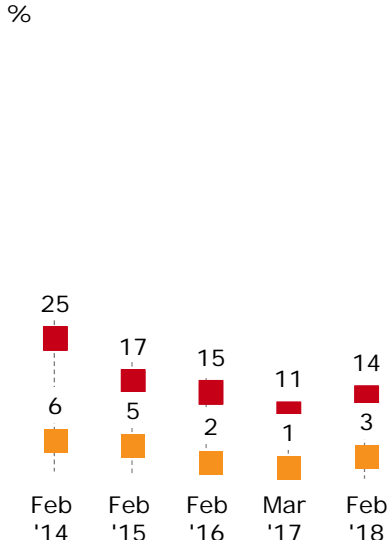


Base: All 17-25s who hold a full driving licence for a car and drive nowadays at each wave
Q4: How much do you agree or disagree that.....

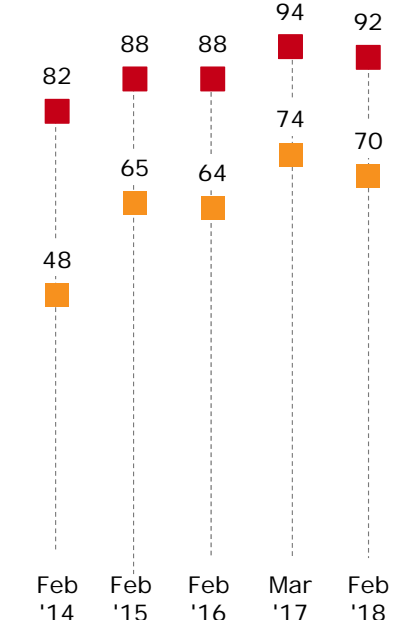
While attitudes against drink driving have not hardened further in 2018, agreement that it is unacceptable remains widespread and strong

Agreement with statements among 17-25 year olds

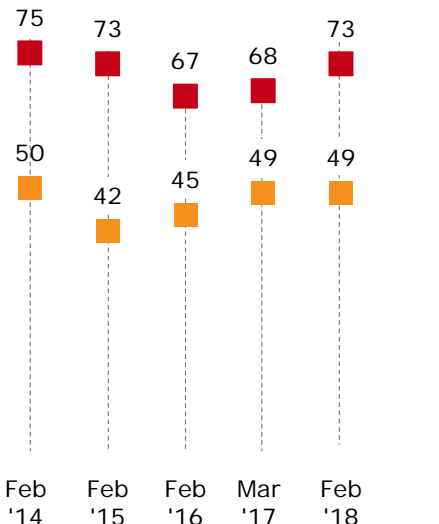
As long as you don't have more than one alcoholic drink, it's generally okay to drive



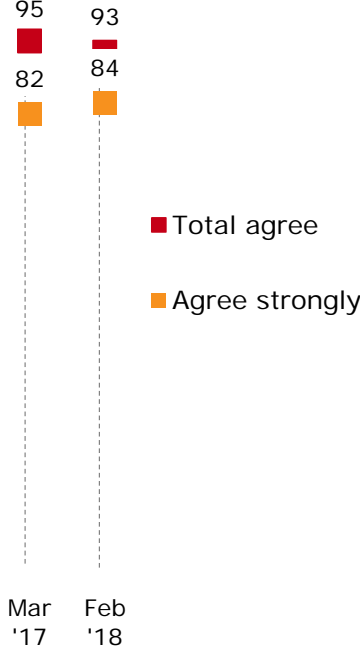
Even one alcoholic drink could put you over the drink driving limit



I would report someone who I suspected was going to drink and drive, or who was drink driving



Drivers should not drink any alcohol in the hours before driving



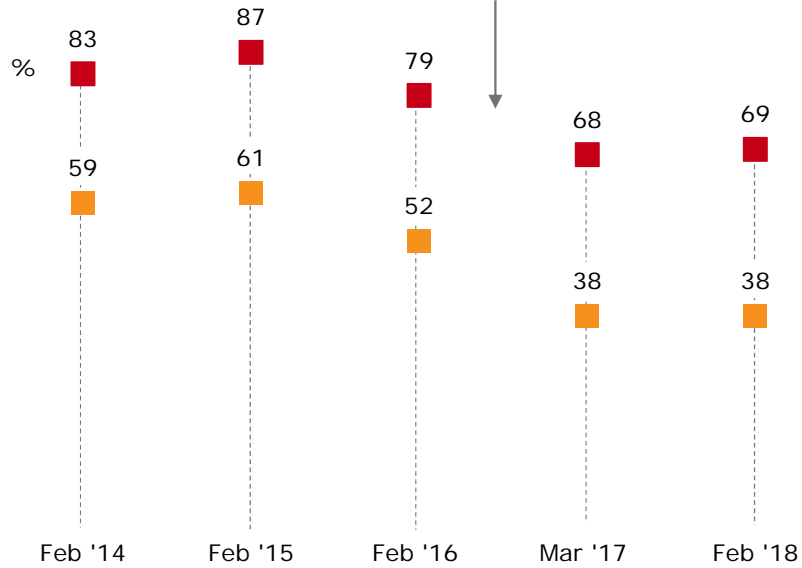
Base: All 17-25s who hold a full driving licence for a car and drive nowadays at each wave
Q4: How much do you agree or disagree that.....

Perceptions that Scotland is tough in tackling drink driving are unchanged in 2018, whereas strong support for being stricter with drug driving has increased

Agreement with statements among 17-25 year olds

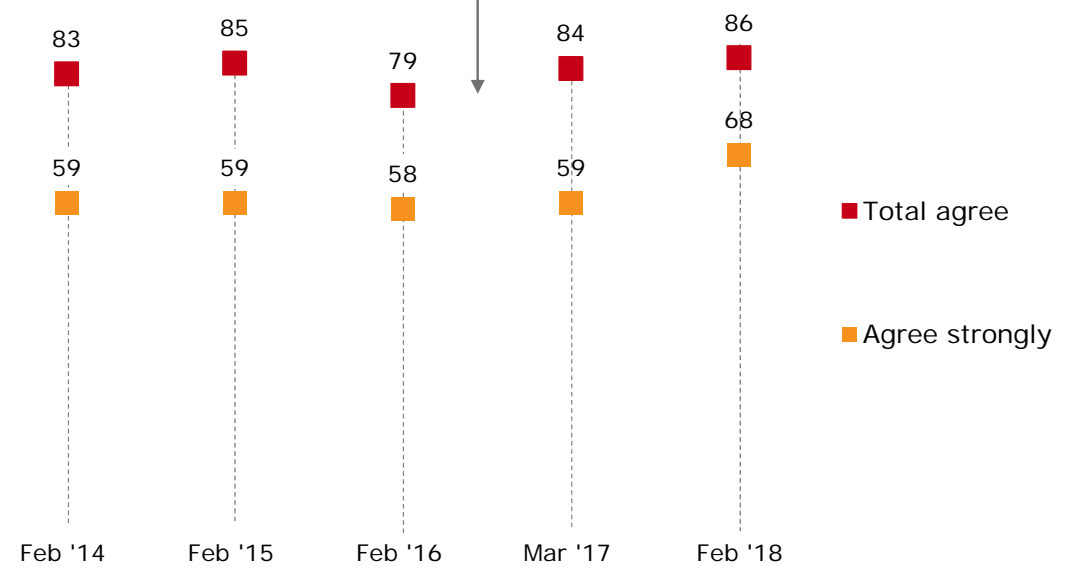
Scotland is tough in tackling drink driving*

(*change in wording from 'is getting tougher')



Scotland should get tougher in tackling driving when under the influence of drugs*

(*change in wording from 'is getting tougher')

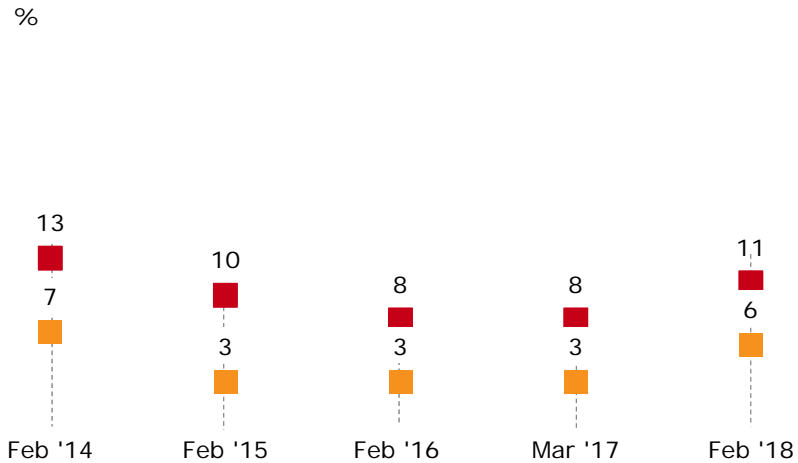


Base: All 17-25s who hold a full driving licence for a car and drive nowadays at each wave
Q4: How much do you agree or disagree that.....

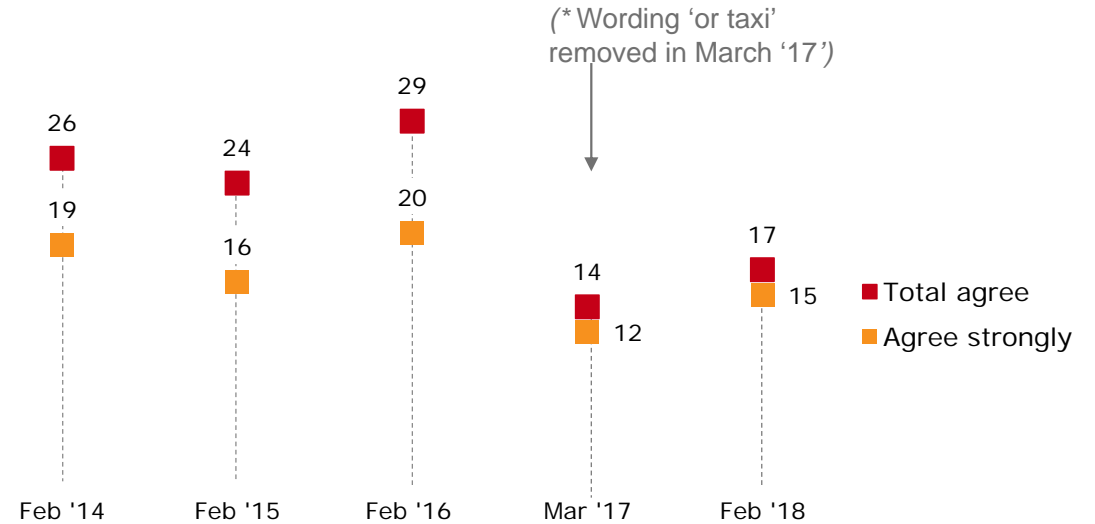
Although most young drivers continue to be aware of the need to wear a seatbelt when driving even for short journeys, a sizeable minority firmly believe it is not needed when travelling in the back

Agreement with statements among 17-25 year olds

If you are just nipping around the corner in the car, it's not essential to wear a seatbelt



*It's not important to wear a seatbelt if you are travelling in the back of a car**

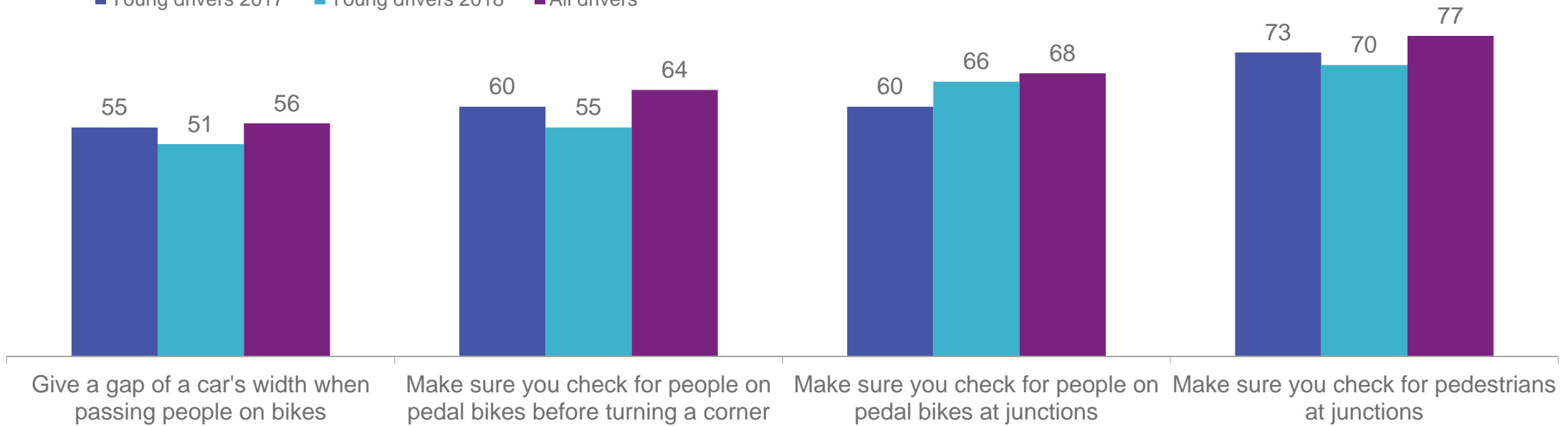


Base: All who hold a full driving licence for a car and drive nowadays at each wave
Q4: How much do you agree or disagree that.....

Compliance with safe driving around VRUs is generally at a slightly lower level in 2018 but not markedly so, with the distance when passing a bike remaining the least likely good driving behaviour to be followed

% that always

■ Young drivers 2017 ■ Young drivers 2018 ■ All drivers

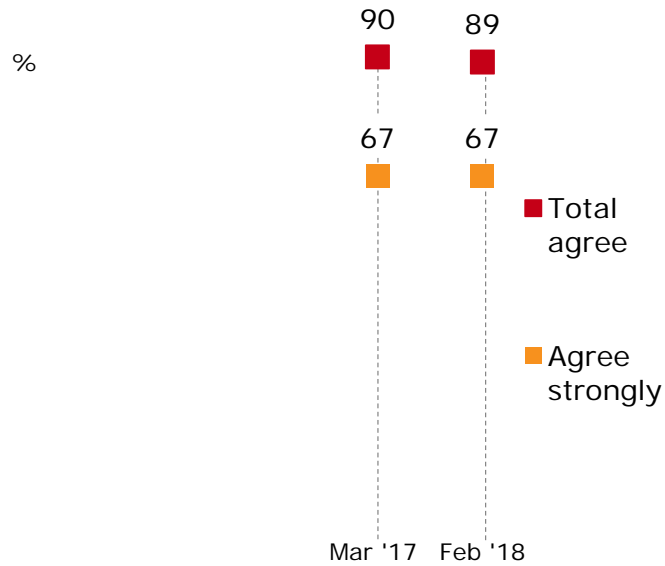


Base: All who hold a full driving licence for a car and drive nowadays; Feb '18 (561)
Q8a: How frequently do you.....?

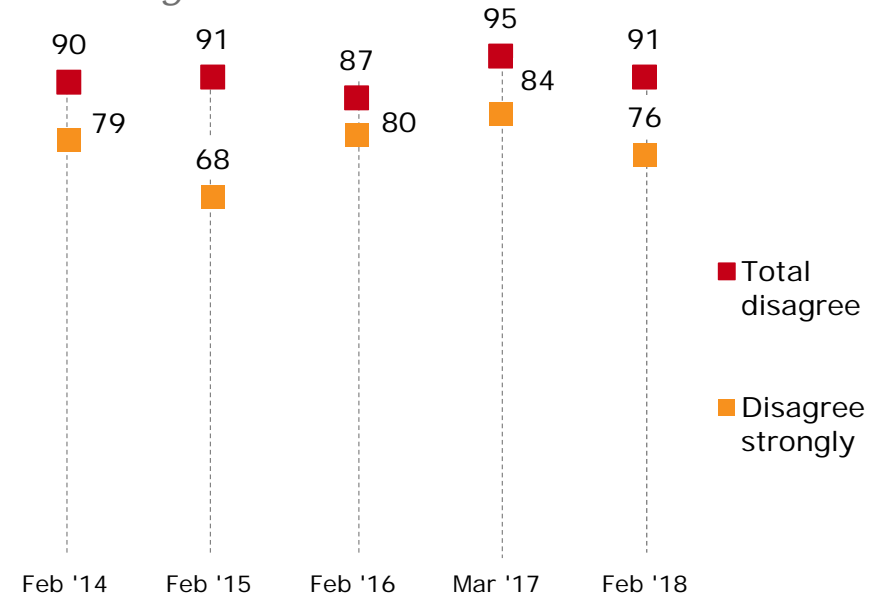
Young drivers appear slightly more committed to not using hand-held mobiles than they do towards driving below speed limit in built up areas – although due to fewer data points on the latter, comparisons must be drawn with caution

Agreement/disagreement with statements among 17-25 year olds

In built up areas where there are pedestrians and people on bikes it may be necessary to drive below the speed limit

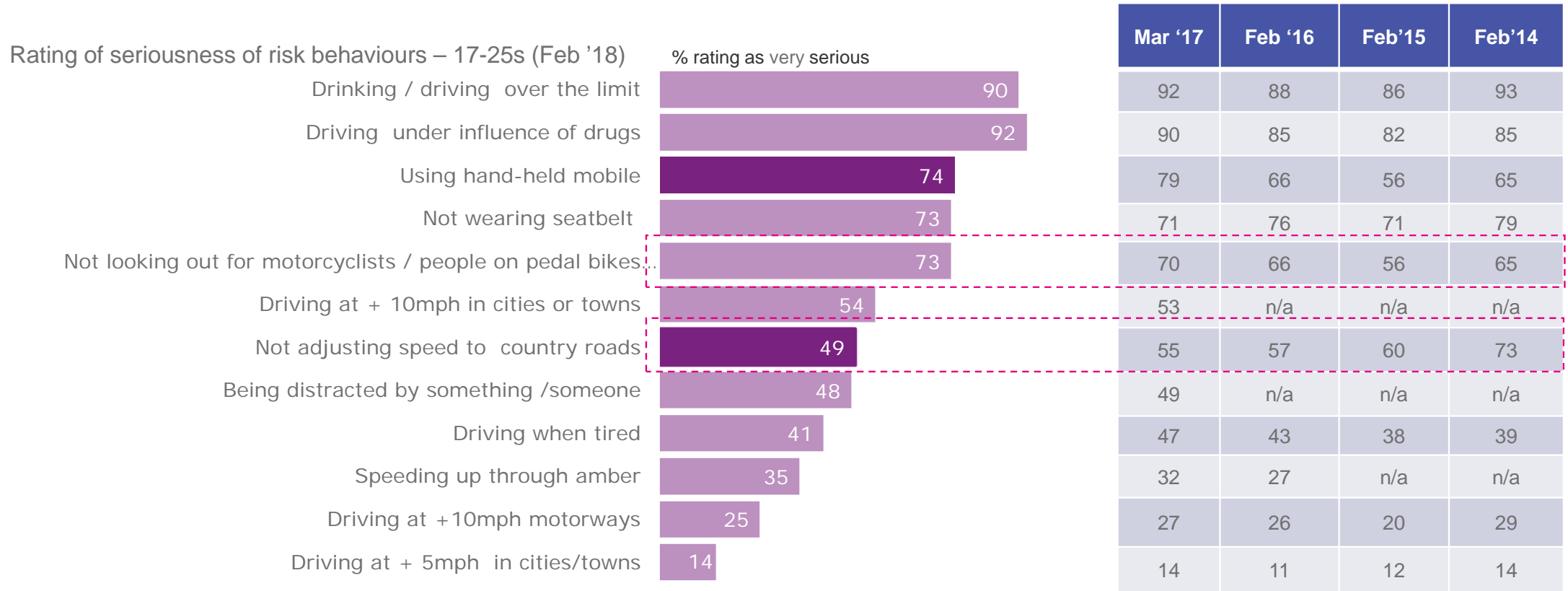


It's okay to answer a hand-held mobile phone if someone calls you when you are driving



Base: All who hold a full driving licence for a car and drive nowadays at each wave
Q4: How much do you agree or disagree that.....

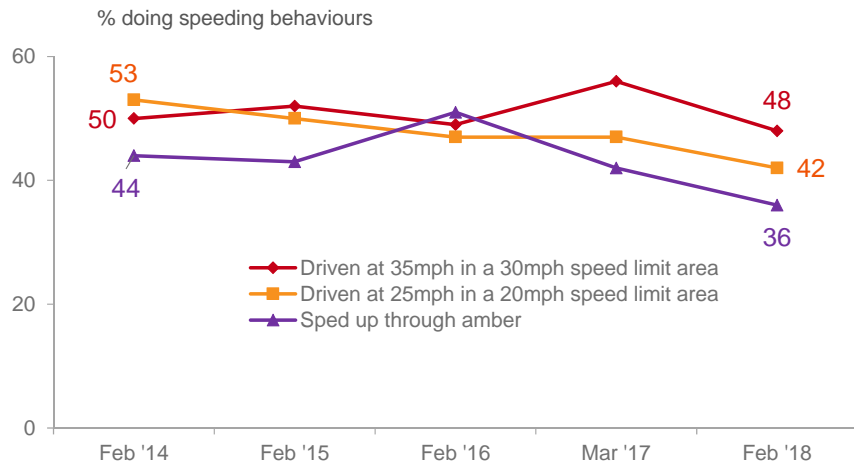
The perceived seriousness of risks to safety of not looking out for motorcyclists / people on pedal bikes continues to rise, whereas the proportion associating serious risks from not adjusting speeds on country roads is steadily declining



Base: All 17-25s who hold a full driving licence for a car and drive nowadays at each wave
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

Speeding behaviours

The shifts in speeding behaviours are more positive for younger drivers; all but one declined in the past year, with driving at 25 in 20mph showing a clear downward trend since 2014.

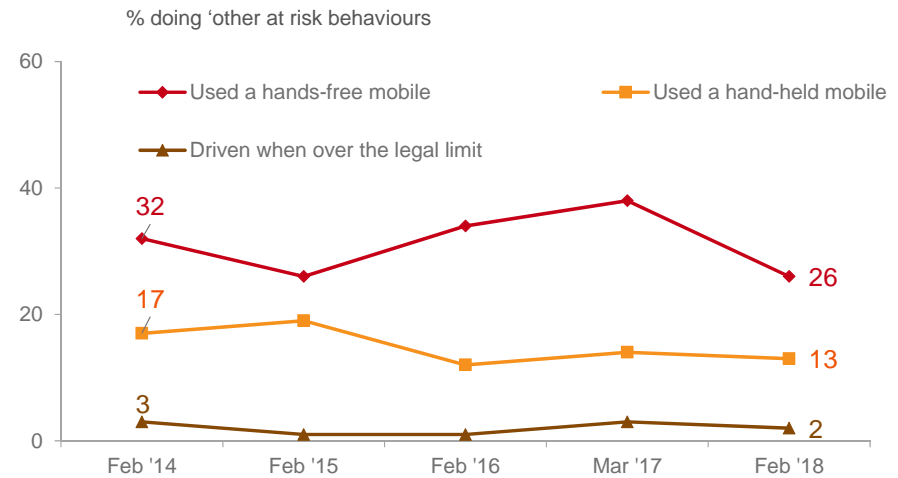


VRUs

Compliance with safe driving around VRUs is at a slightly lower level among young drivers but not markedly so, with the distance between car and bike also the good practice behaviour least likely to be consistently followed.

Mobiles and other 'at risk' behaviours

In contrast to drivers generally, usage of hands-free mobiles has seen a decline in the past year among young drivers although a small, but nevertheless sizeable, minority (13%) continue to use hand-held.



Also positively, usage of a hand-held mobile remains social unacceptable for most, and strongly so, and the perceived seriousness of risks from using a hand-held mobile phone remains high.

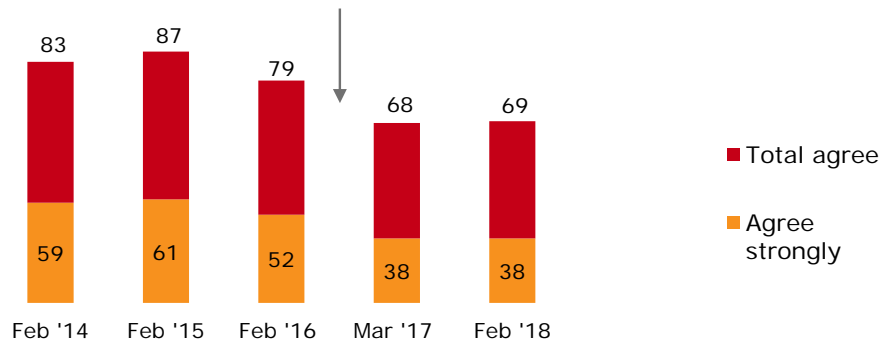
Most 'other' at risk behaviours have remained stable since last year.

Attitudes to Drink/drug Driving

Perceptions that Scotland is tough in tackling drink driving remain unchanged since last year; opinion that Scotland should take a tougher stance on drug driving is at an all time high.

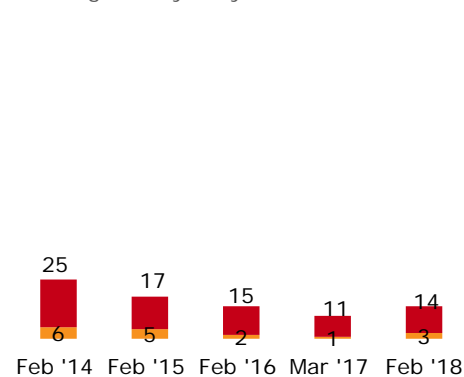
Agreement with statements among 17-25 year olds

*Scotland is tough in tackling drink driving** (change in July 16 from 'is getting tougher')

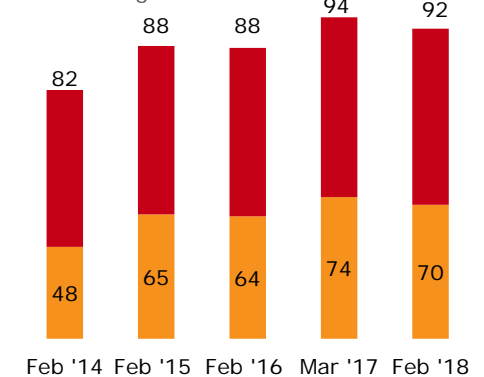


Agreement that it is okay to have one drink and drive continues to be low and recognition that one drink puts you over the limit remains high, although neither 'improved' at the latest wave.

As long as you don't have more than one alcoholic drink, it's generally okay to drive



Even one alcoholic drink could put you over the drink driving limit



Country Roads

Not adjusting to speed on country roads occurs at twice the level of all drivers, with little evidence of this changing and the perceived seriousness of risk from not adjusting to speeds on country roads continues to decline (from 73% rating it as a 'very serious' risk in 2014 to 49% at the latest wave).

Risk of being caught

The perception that there is a *greater* likelihood of being caught compared to last year fluctuates, and although down at latest wave, it appears to be increasing. Conversely, the proportion believing that the risk of detection is low is at the highest level recorded.

The size of the minority claiming that the penalties are too low to prevent offences remains consistent with previous years.

10

Key take-outs

Speeding

Most speeding behaviours appear to be **on the increase again**, in contrast to downward trends in past two years. Likewise, latest figures show **lower levels of consistent compliance with national speed limits**.

Driving at 35mph in 30 mph area remains the most common speeding risk behaviour, and while this remains well below high level noted five or six years ago, there are signs that **it's no longer trending downwards**.

The gradual **increase in association with this offence and softer penalties** may be impacting on behaviour as may the slow decline in the perception police enforcement levels are higher than before.

Drink & Drug driving

Views towards drink driving **continue to harden**, evidenced by increasing agreement that drivers should not drink any alcohol before driving and heightened awareness that even one alcoholic drink could put you over the limit.

Widespread **recognition of the risks to safety** posed by drink and by drug influenced driving, also **show no signs of weakening**, and support for tackling drug driving also remains consistently high.

In this context consistently high levels of awareness of disqualification as the penalty for these behaviours is unsurprising.

Mobile phones

While attitudinally most **drivers remain firmly opposed to usage of a hand-held mobile** when driving, the **drop in claimed usage** in March 2017 when the penalties were increased, **has already been reversed**.

While the absolute numbers remain low, the doubling in proportions claiming to use a hand-held mobile is particularly disappointing.

These shifts are, however, in line with **increasing associations with softer penalties for driving using a mobile**, and a corresponding **drop in awareness of harsher penalties** of points and disqualification – highlighting the need for **continued communication on the consequences** and higher penalties of using a mobile phone when driving.

11

Appendix

Survey sample sizes

Base sizes for each wave featured throughout report are detailed here unless otherwise specified

Main Omnibus survey

Month	Fieldwork dates	Sample size
September 2010	22 – 29 September	606
February 2011	23 February – 3 March	603
September 2011	21 – 29 September	583
February 2012	29 February – 18 March	608
August 2012	22 – 30 August	550
February 2013	20 – 28 February	568
July 2013	24 – 30 July	556
February 2014	26 February – 9 March	606
July 2014	23 July – 7 August	560
February 2015	25 February – 24 March	468
July 2015	5 – 18 August 2015	534
February 2016	24 February – 15 March 2016	536
July 2016	20 July – 10 August 2016	582
March 2017	8 – 24 March 2017	600
August 2017	4 – 28 August 2017	525
February 2018	21 February – 13 March 2018	561

Youth Boost – 17-25s

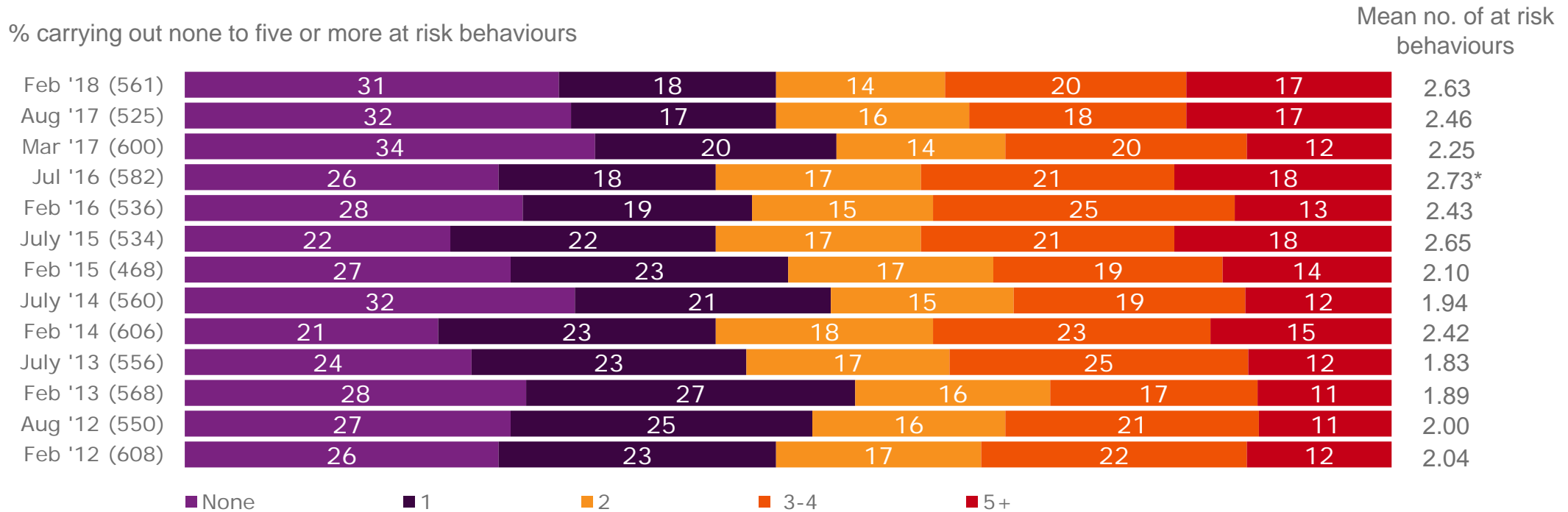
February 2014	152
February 2015	143
February 2016	143
March 2017	146
February 2018	157

Demographic profile of active drivers in sample

		Feb '14 Un-Wtd (606) %	Feb '14 Wtd (582) %	July '14 Un-wtd (560) %	July '14 Wtd (570) %	Feb '15 Un-wtd (468) %	Feb '15 Wtd (516) %	July '15 Un-wtd (534) %	July '15 Wtd (552) %	Feb '16 Un-wtd (536) %	Feb' 16 Wtd (538) %	July '16 Un-wtd (582) &	July '16 Wtd (592) %	Mar '17 Un-wtd (600) %	Mar '17 Wtd (600) %	Aug '17 Un-wtd (525) %	Aug '17 Wtd (556) %	Feb '18 Un-wtd (561) %	Feb' 18 Wtd (591) %
GEN- DER	Male	52	55	51	54	59	57	54	55	53	54	57	55	52	55	54	53	56	54
	Female	48	45	49	47	41	43	46	45	47	46	43	45	48	45	46	47	44	46
AGE	16-34	19	21	17	21	20	25	19	23	18	22	16	20	20	20	19	23	20	22
	35-44	12	22	17	20	14	19	16	18	12	19	14	17	16	18	11	17	14	18
	45-54	19	22	19	21	18	20	21	21	17	22	19	23	19	22	20	23	13	20
	55-64	21	17	20	19	20	17	15	18	20	18	21	18	21	18	17	16	17	17
	65+	29	18	27	20	28	19	29	29	19	33	19	30	21	25	21	32	21	36
SEG	ABC1	57	61	56	60	52	61	58	62	60	60	55	65	58	64	55	64	55	64
	C2DE	43	39	44	40	48	39	42	39	40	40	45	35	43	35	45	37	45	36
AREA	West	35	41	38	36	32	37	37	39	37	35	37	38	39	38	40	41	38	42
	East / South	35	34	38	39	42	39	35	34	44	40	43	37	30	37	30	31	34	30
	North	30	25	24	25	26	24	28	27	19	24	20	25	31	25	30	28	28	28

NB: Weighting applied to overall sample to match general population of Scotland. Then, results were filtered among drivers, hence slight difference in weighted profile at each wave

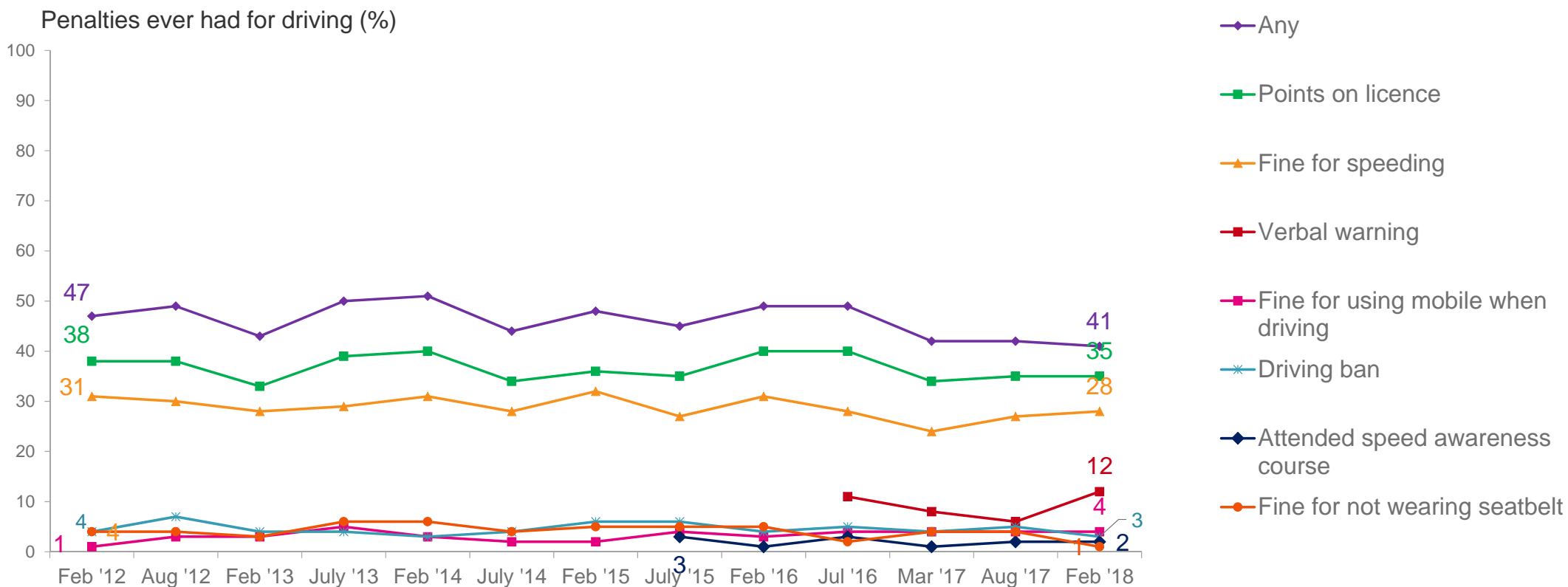
Number of at risk behaviours



Base: All who hold a full driving licence for a car and drive nowadays
 Q6: Which of the following have you done at all in the last 12 months, even if only on one occasion or for a short distance?

** Increase reflects new 'speeding behaviour' – Driven at 40mph in a 30mph speed limit area*

With exception of verbal warnings, the level of many penalties received appears to have plateaued



Base: All who hold a full driving licence for a car and drive nowadays ? (prompted)
 Q9: Which of these have you ever had?