



KANTAR TNS.

RITS: Driver attitudes and behaviour tracking - latest trends (Wave 17)

October 2018
40304067



**Safer
Scotland**
Scottish
Government

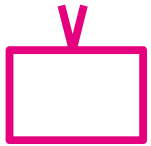
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1

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 from wave 17 are presented here together with results from previous waves.

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 CAPI* 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) – 589 drivers at **Wave 17: 1 – 26 August 2018.**

Started in 2010; runs twice during 12 month period; data from 2012 onwards, or from when first asked, shown today.



2

Speeding

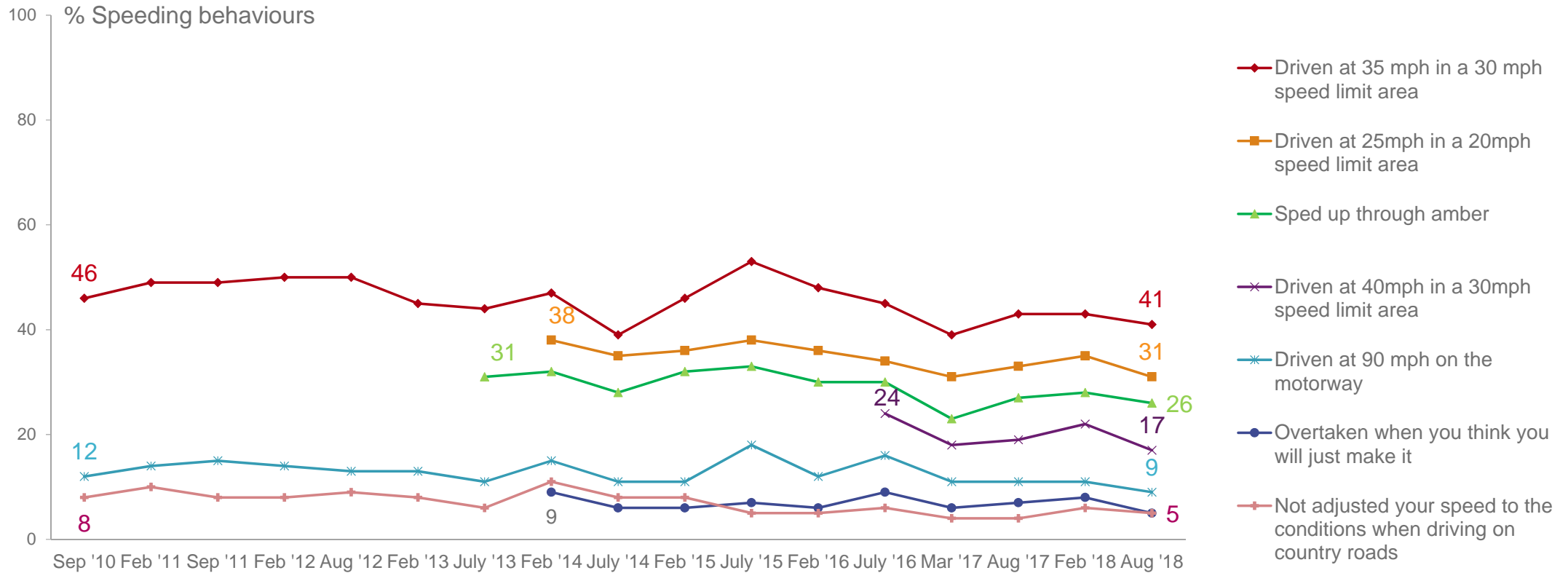
Claimed behaviours

Awareness of penalties

Attitudes

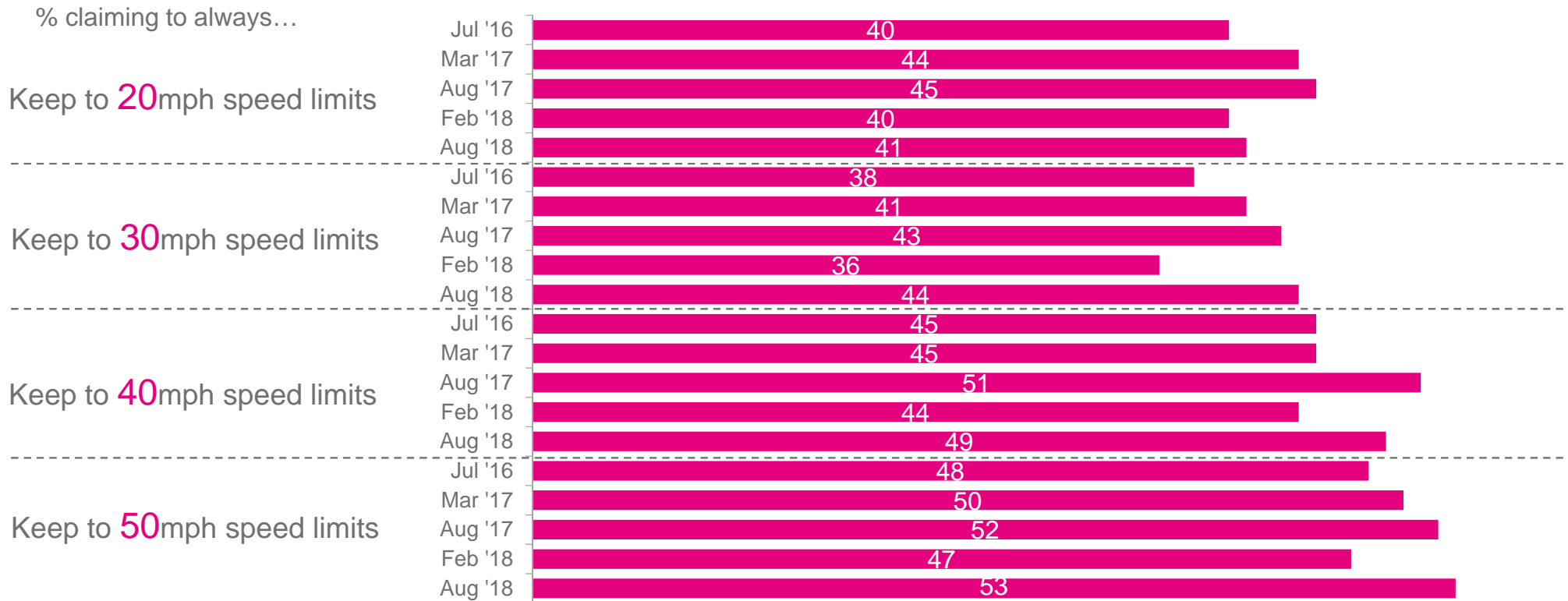
Perceptions of seriousness

The overall trend for speeding behaviours continues downward, following a slight rise on several of these scenarios in the previous 12 months



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?

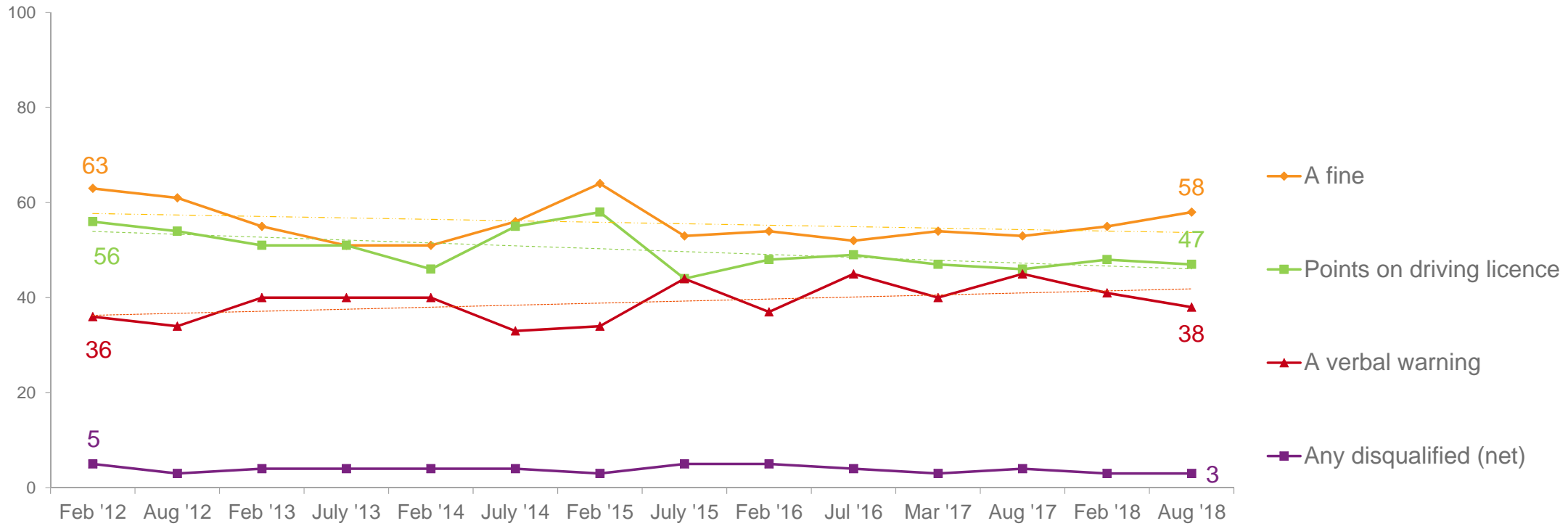
Similarly, the latest figures show that the proportion 'always' adhering to speed limits has reverted back to previous levels, following a slight dip February 2018



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); Aug '18 (589)
 Q8a: How frequently do you....?

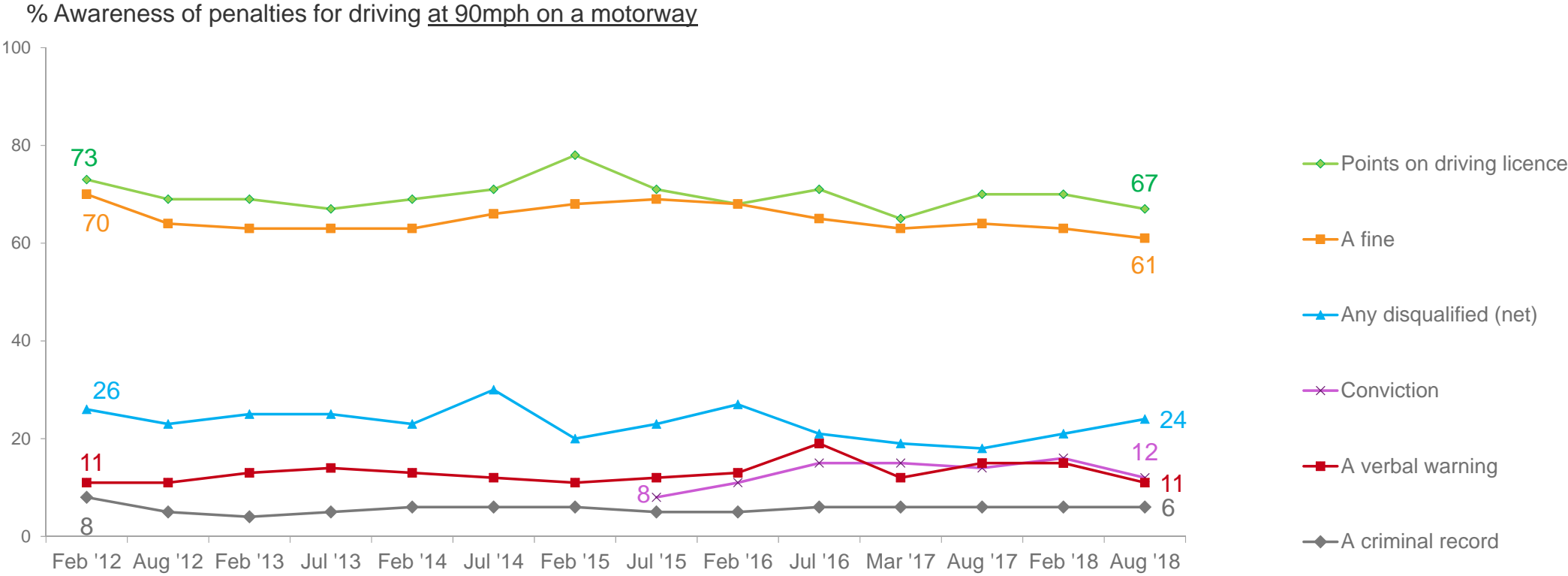
The penalties associated with driving at 35mph in 30mph limit area have remained broadly level in past few years. Reference to points on a driving licence shows the greatest decline since the tracking started

% Awareness of penalties for driving at 35mph in a 30mph area



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 penalties primarily associated with speeding on a motorway are a fine and points, although less so than when tracking started

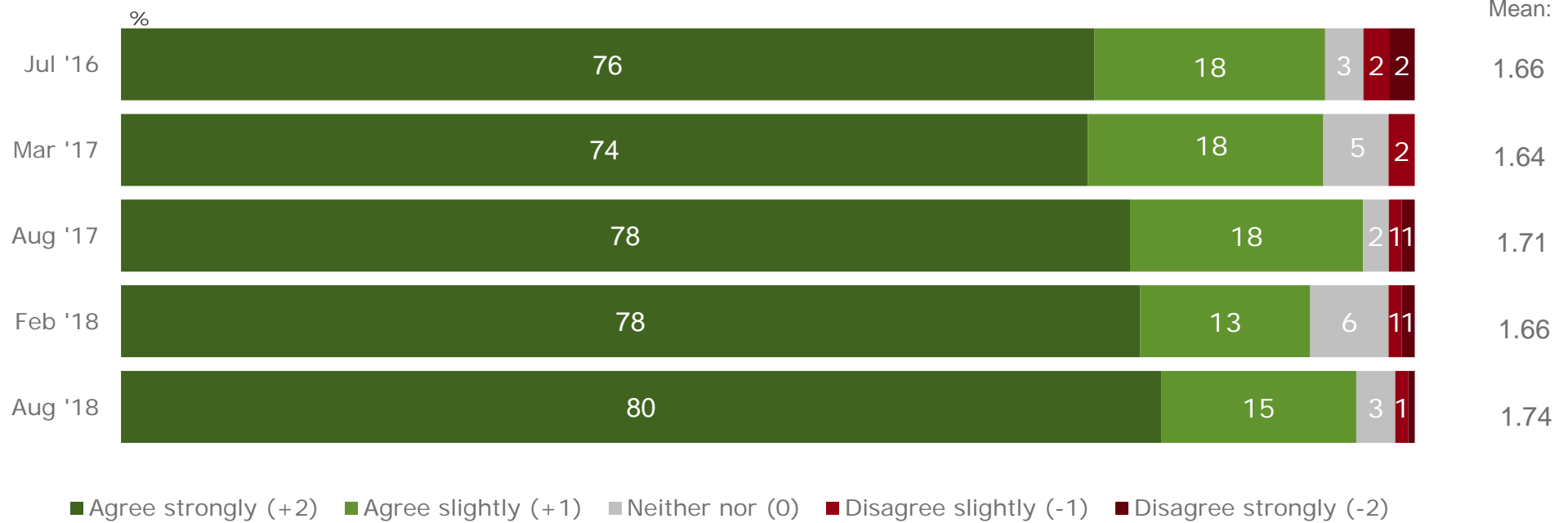


Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

A strong belief in the need to drive below the speed limit in built up areas continues to increase among drivers

% agreeing/disagreeing:

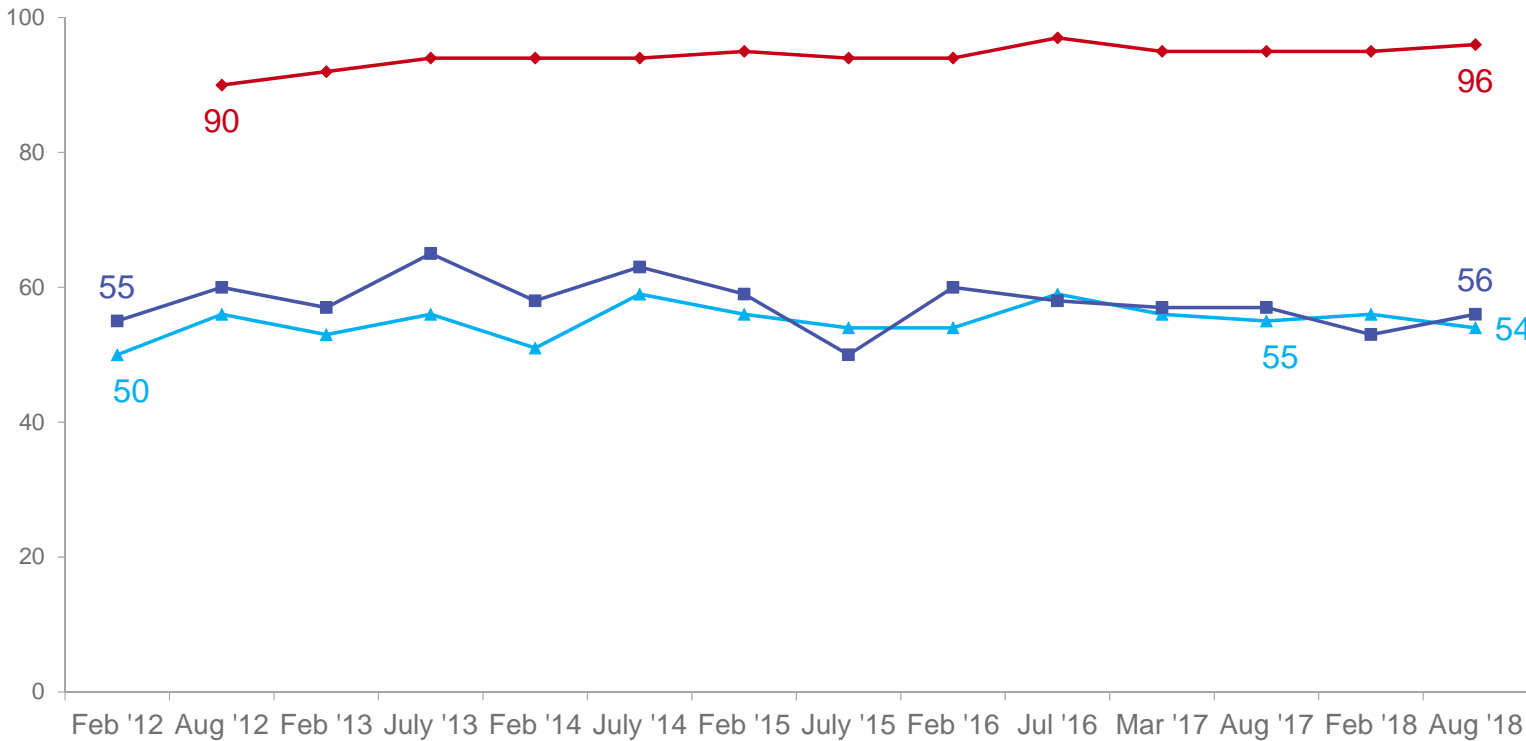
In built up areas, where there are pedestrians and cyclists, it may be necessary to drive below the speed limit



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.....

Attitudes towards driving on country roads have remained broadly similar among all drivers in recent years, with little sign of increased support for a 50mph limit

% saying Agree strongly/agree slightly



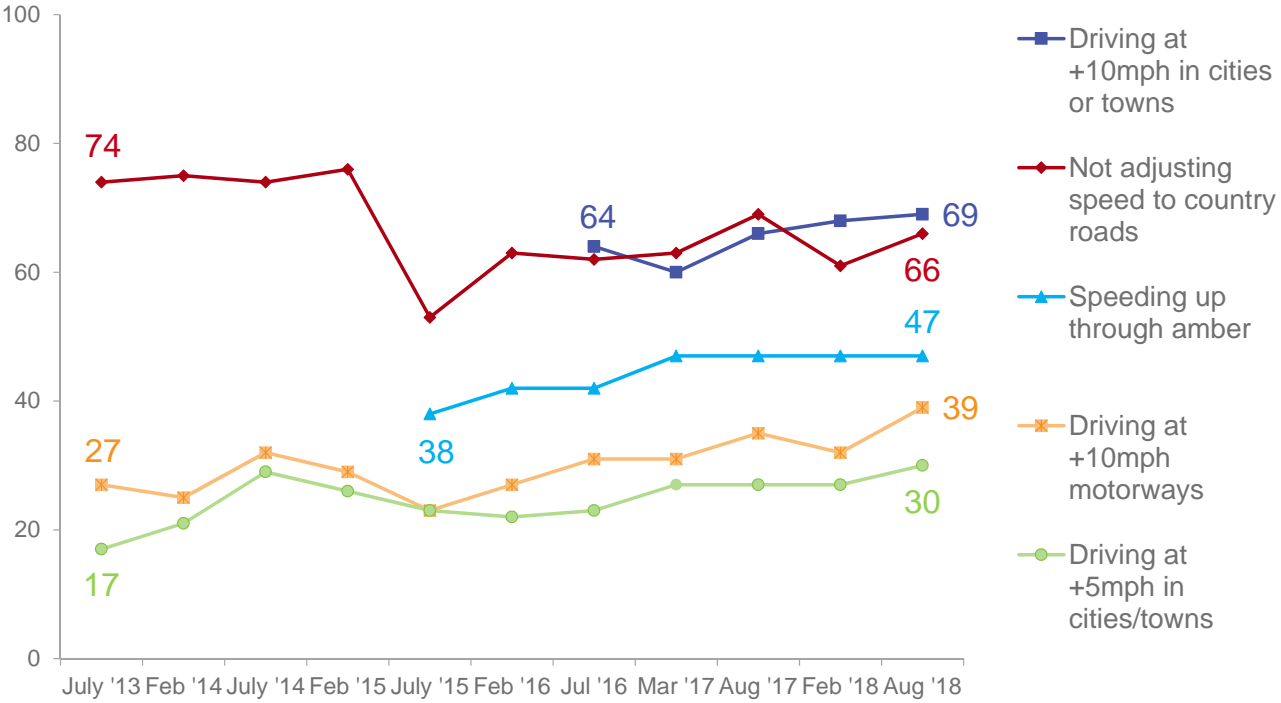
- ◆ You should continually adjust your speed when driving on country roads*
- ▲ There should be a maximum speed limit of 50mph on all country roads because of the greater risks when driving on these
- More fatal accidents in Scotland happen on country roads than on any other type of road

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

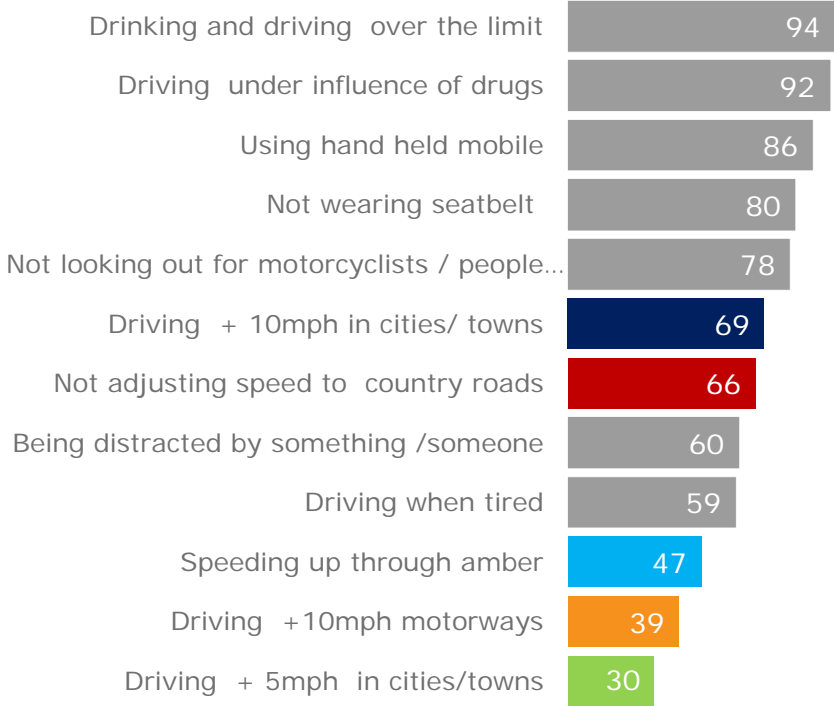
Base: All who hold a full driving licence for a car and drive nowadays
Q4: How much do you agree or disagree that ...?

There have been further increases in the perceived seriousness of driving above the limits in built up areas and on motorways – all at highest recorded levels

% rating speeding behaviours as 'very serious'- TRENDS



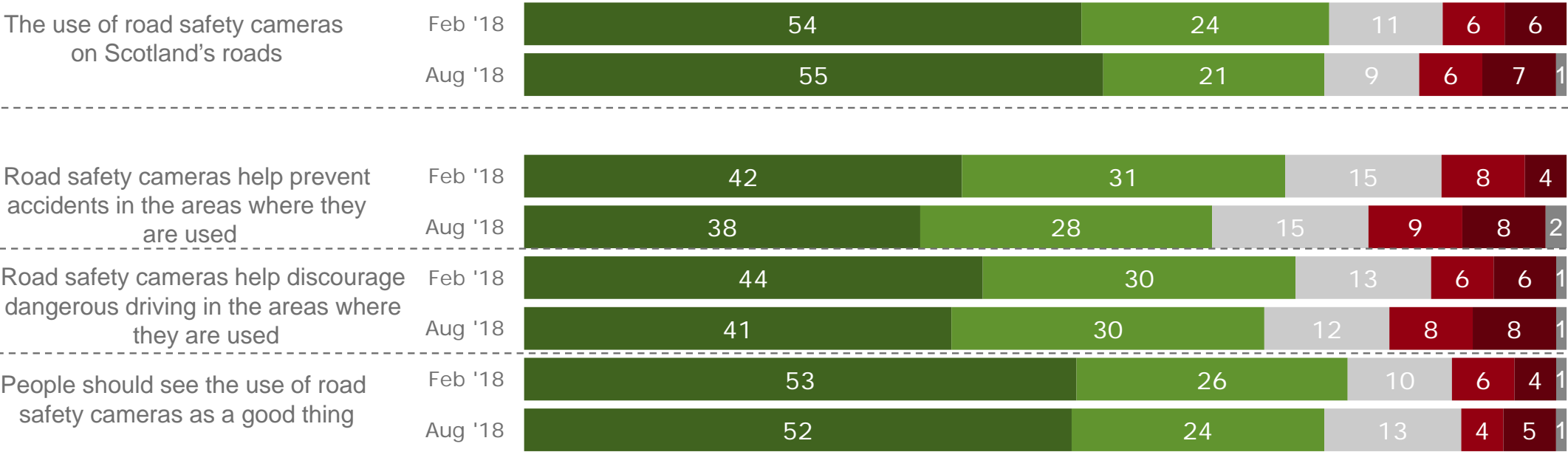
% rating 'very serious' across all behaviours in August 18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 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?

Views towards the use of road safety cameras on Scotland's roads remain positive although there has been a slight drop in the perceived benefits in relation to accidents/driving behaviour

Agreement with statements about road safety cameras (%)



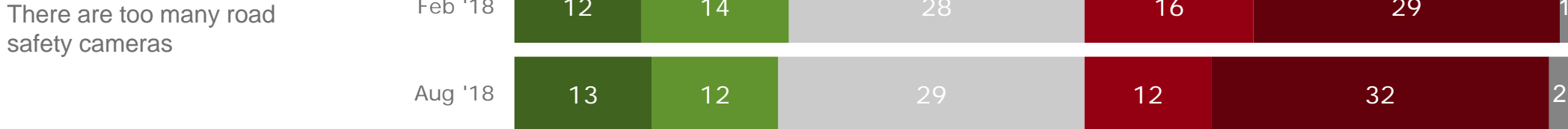
■ Agree strongly (+2) ■ Agree slightly (+1) ■ Neither nor (0) ■ Disagree slightly (-1) ■ Disagree strongly (-2) ■ Don't know

Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 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 (589 at Wave 17)
 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.

More positively, cynicism around the aim of road safety cameras has dropped back slightly since February

Agreement with statements about road safety cameras (%)



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

Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 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.

3

Drink and drug driving

Claimed behaviours

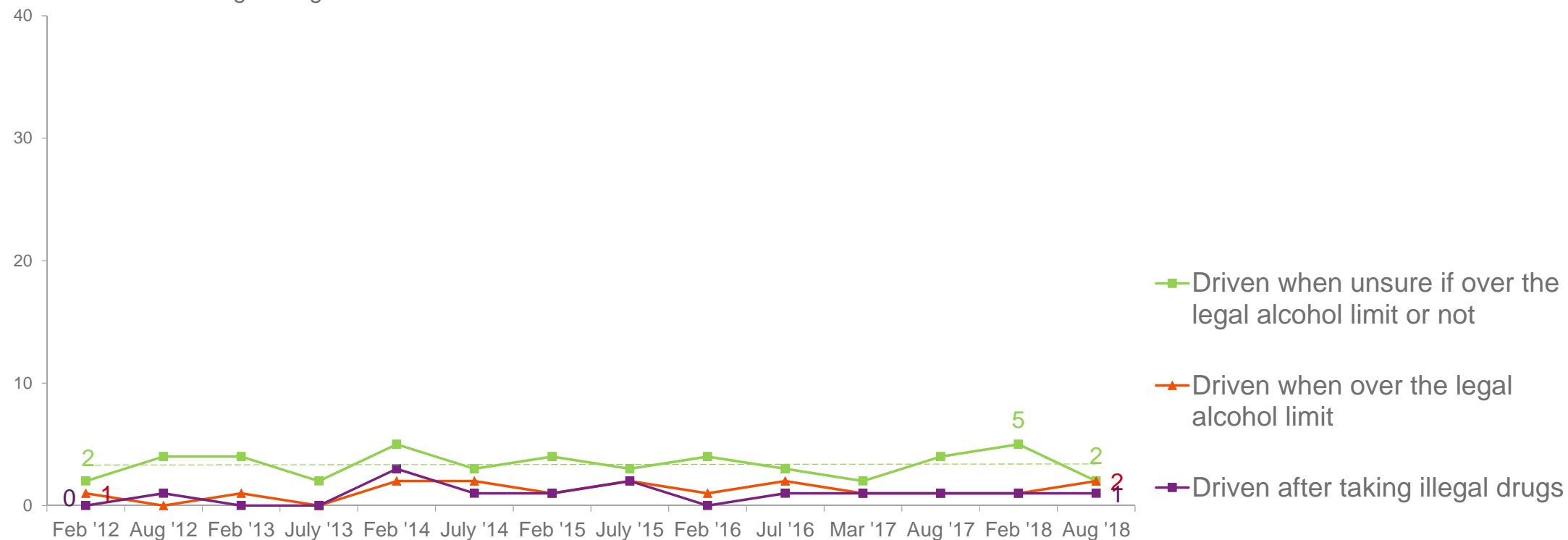
Awareness of penalties

Attitudes

Perceptions of seriousness

Positively, driving when unsure if over the limit, has fallen back again since February 2018 and reverted to previous low level

% Drink and drug driving behaviours

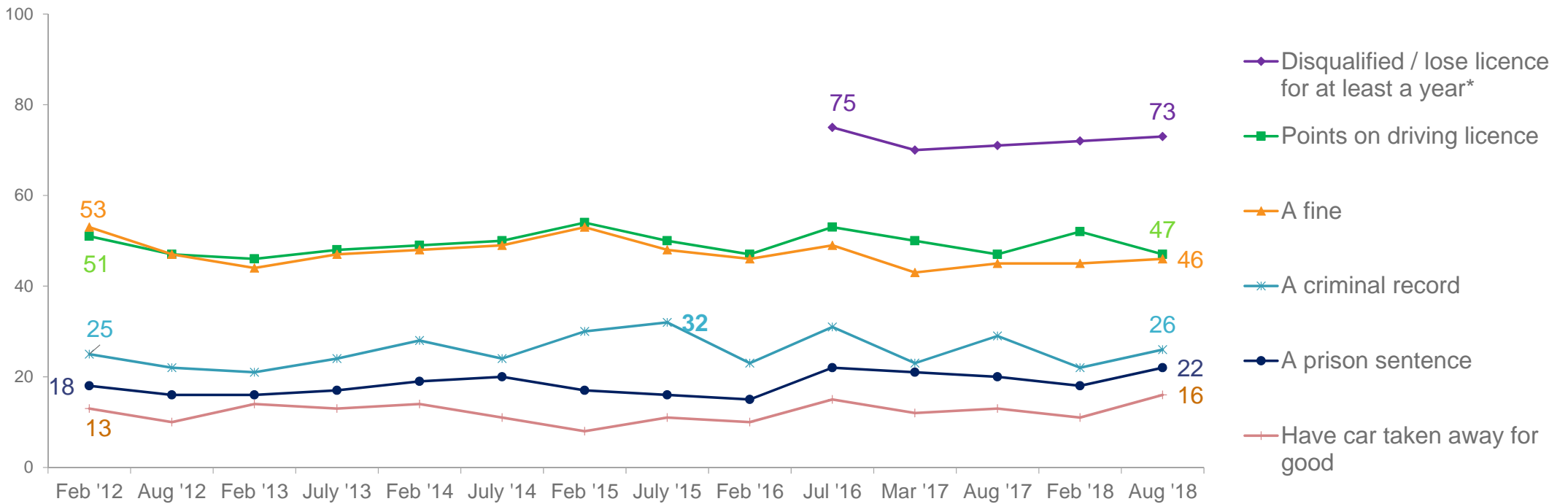


Base: All who hold a full driving licence for a car and drive nowadays

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?

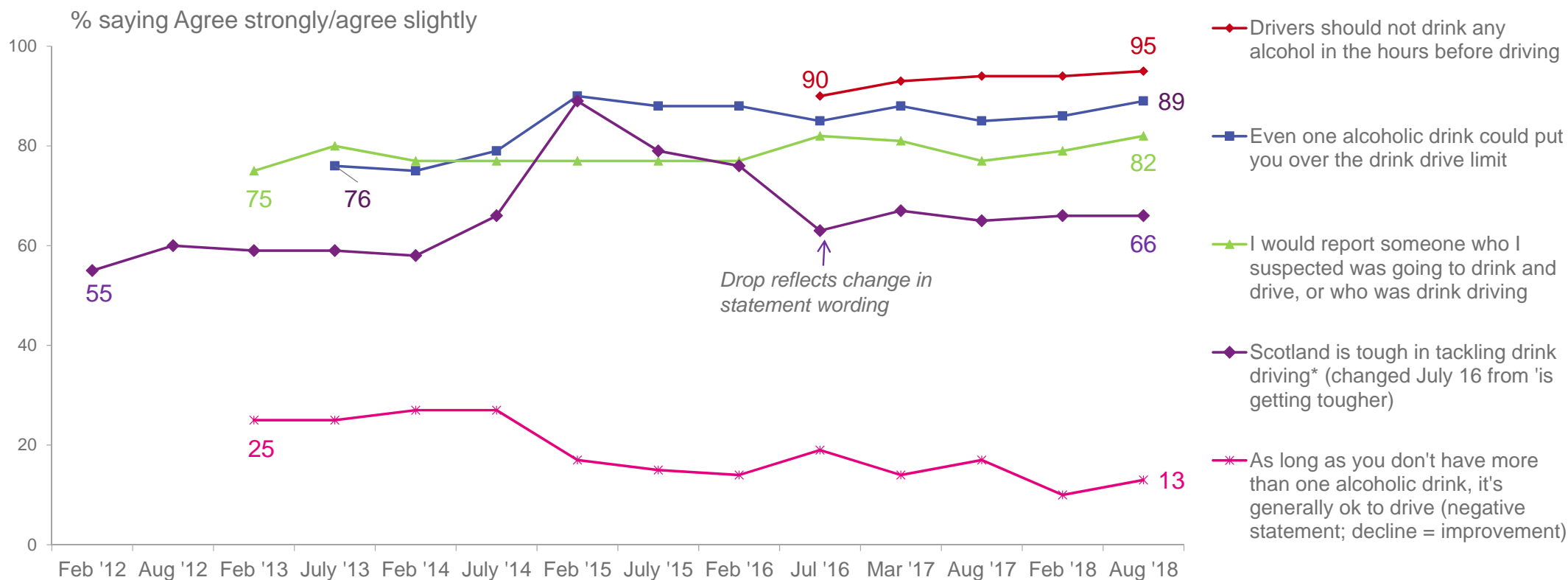
Awareness of the drink driving penalties of 'a prison sentence' and 'car being taken' continue to show small signs of increasing since the change in limit, but same pattern not evident for a criminal record

% aware of penalties for driving over the alcohol limit



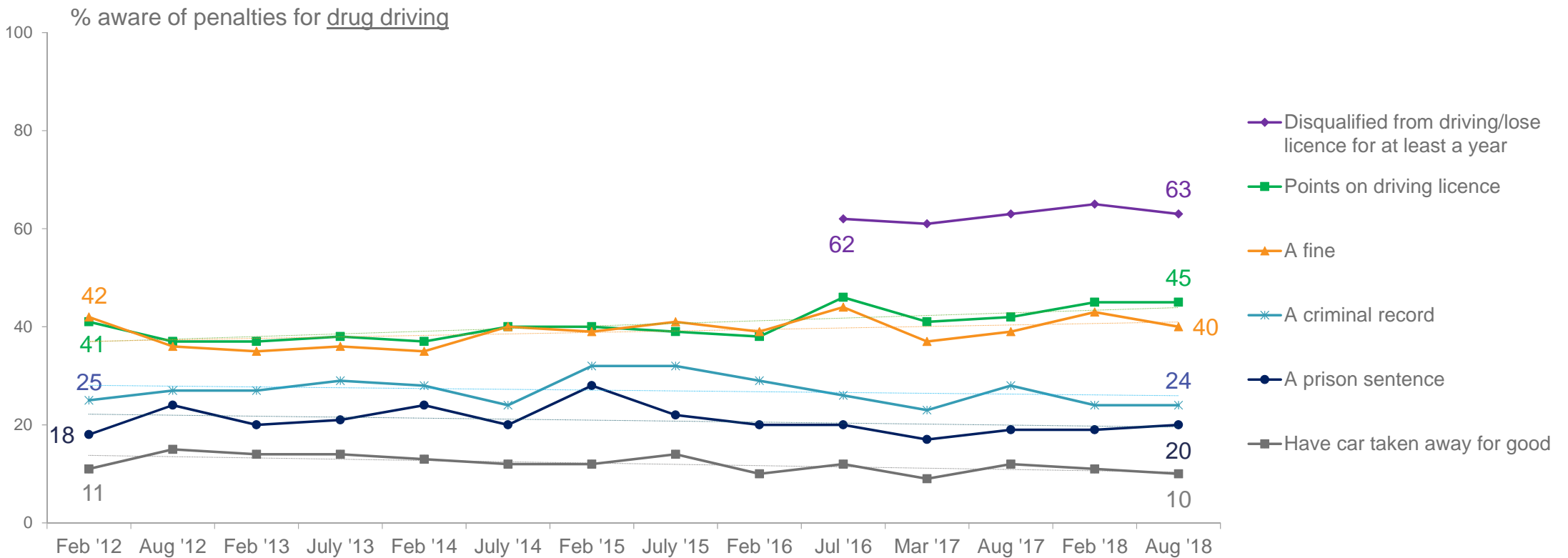
Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

The hardening of attitudes towards drink driving following change in limit in 2014 show no signs of diminishing



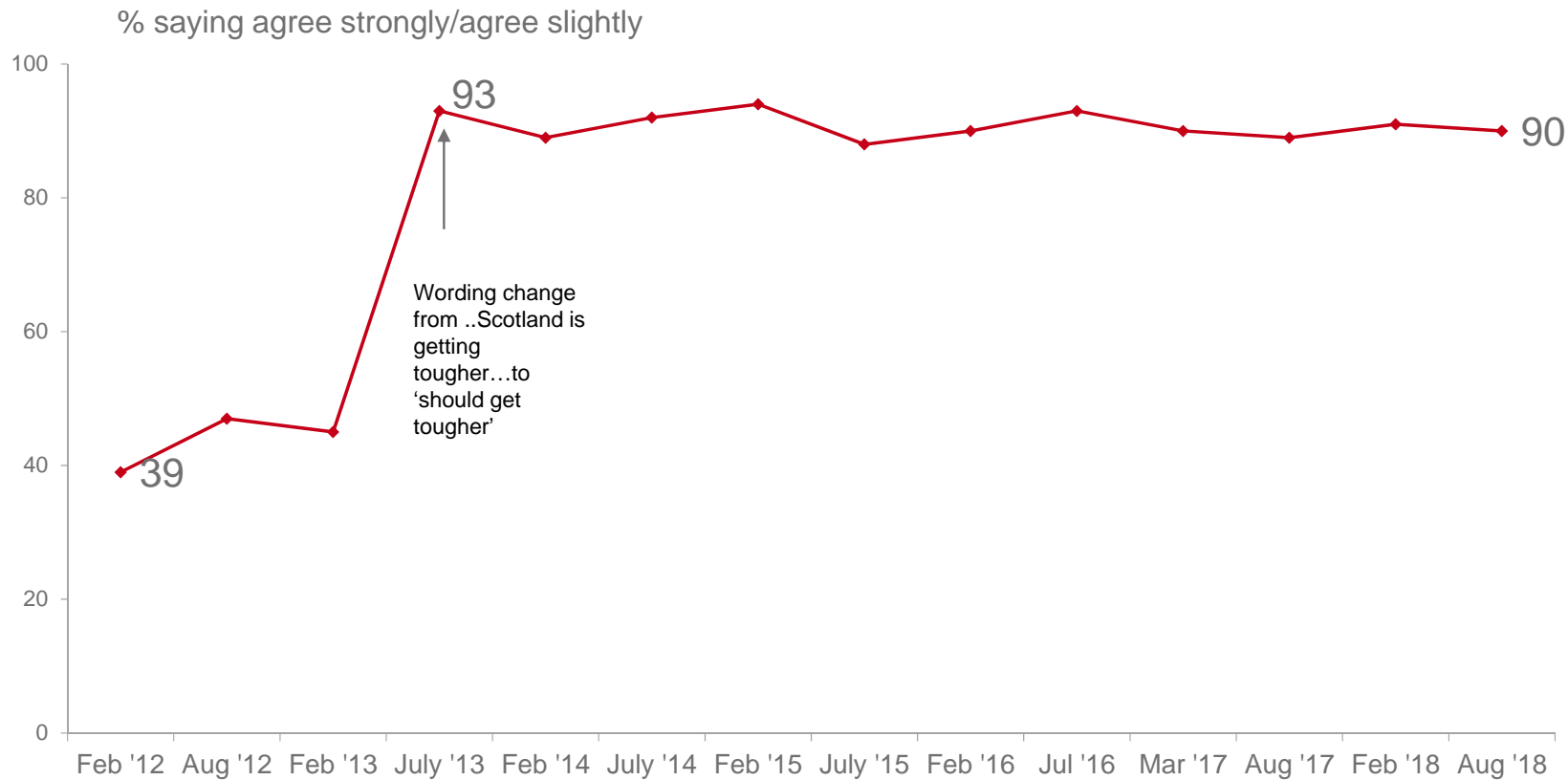
Base: All who hold a full driving licence for a car and drive nowadays
 Q4: How much do you agree or disagree that ...?

With exception of a spike for ‘a criminal record/prison sentence’ in 2015, there has been little movement in awareness levels of penalties associated with drug driving. Only ‘a fine’ shows any signs of increasing prominence



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 remains at a high level

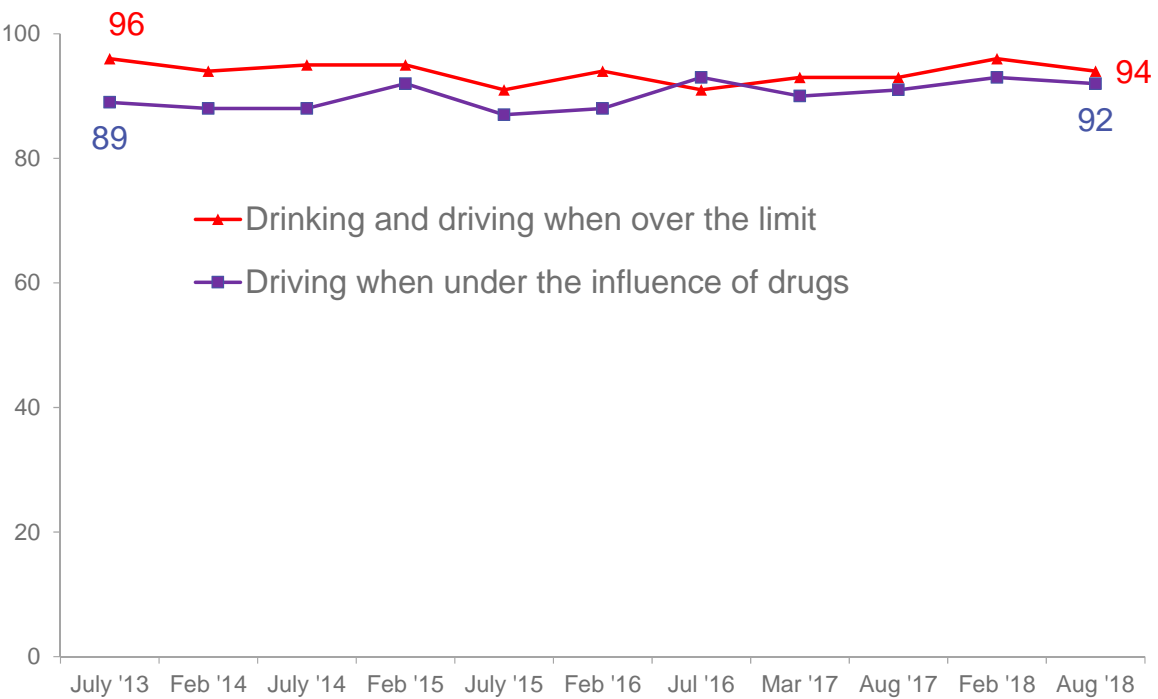


Scotland should get tougher in tackling driving when under the influence of drugs

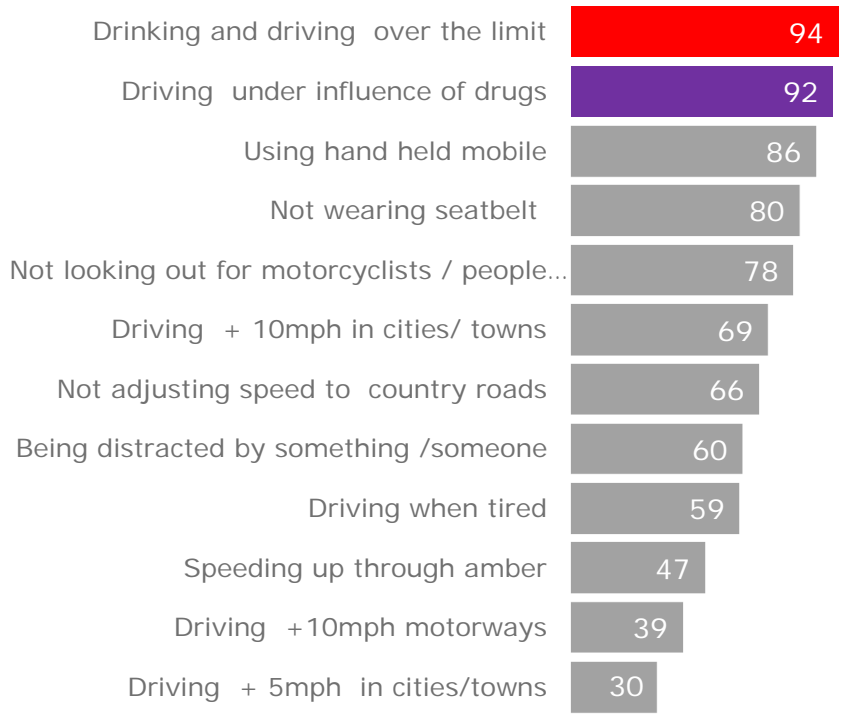
Base: All who hold a full driving licence for a car and drive nowadays
Q4: How much do you agree or disagree that ...?

Drink driving and driving under the influence of drugs are equally likely to be considered as serious risk behaviours; both continue to dominate the 'risk' table

% rating drink/drug behaviours as 'very serious' - TRENDS



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



Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 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?

4

Mobile phone usage

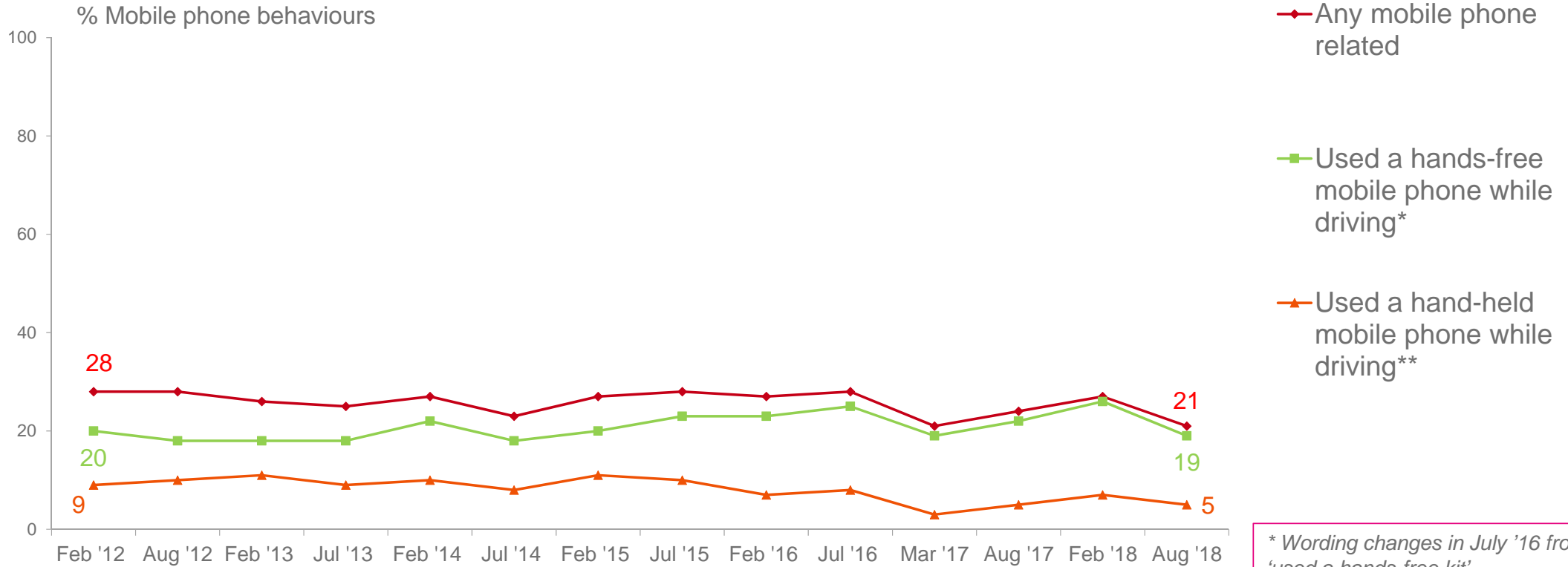
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

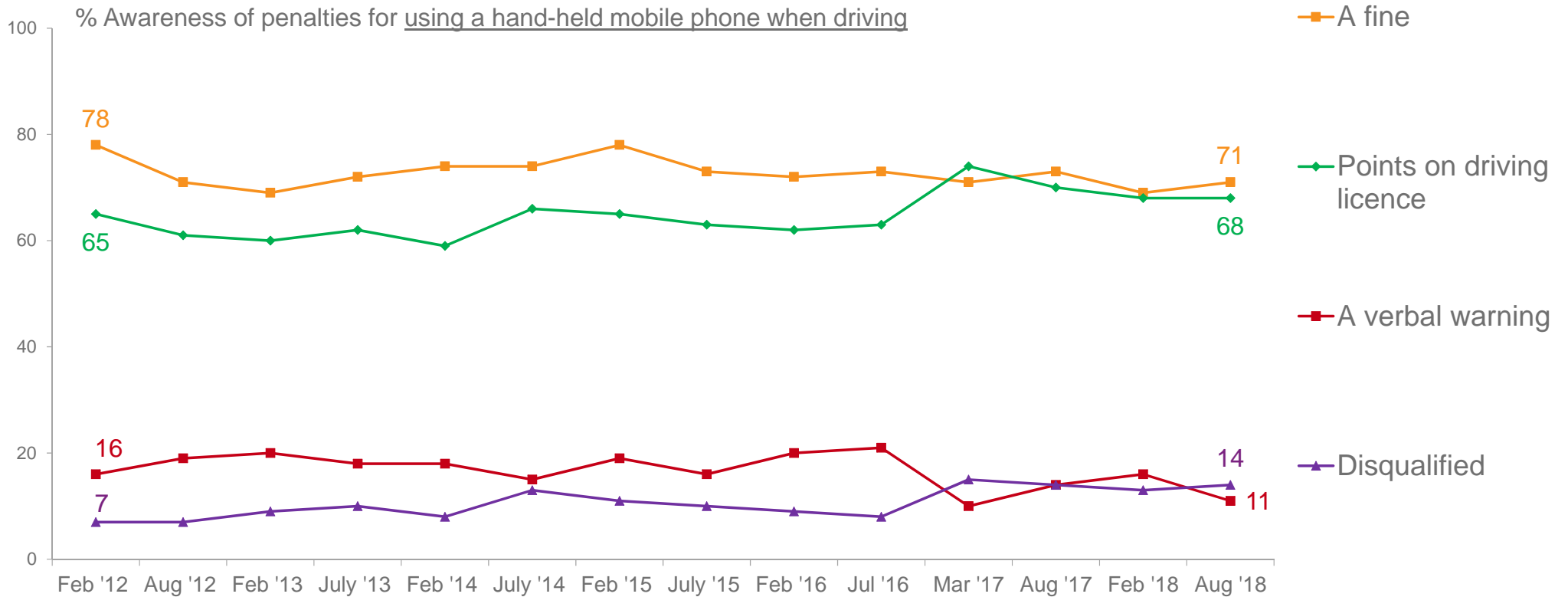
The upward trend in usage, following a dip in March '17 when increased penalties were introduced, has not been sustained at latest wave



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'

Following changes in legislation in 2017, points and a fine are equally familiar penalties for mobile phone usage, whereas a verbal warning is less likely to be mentioned

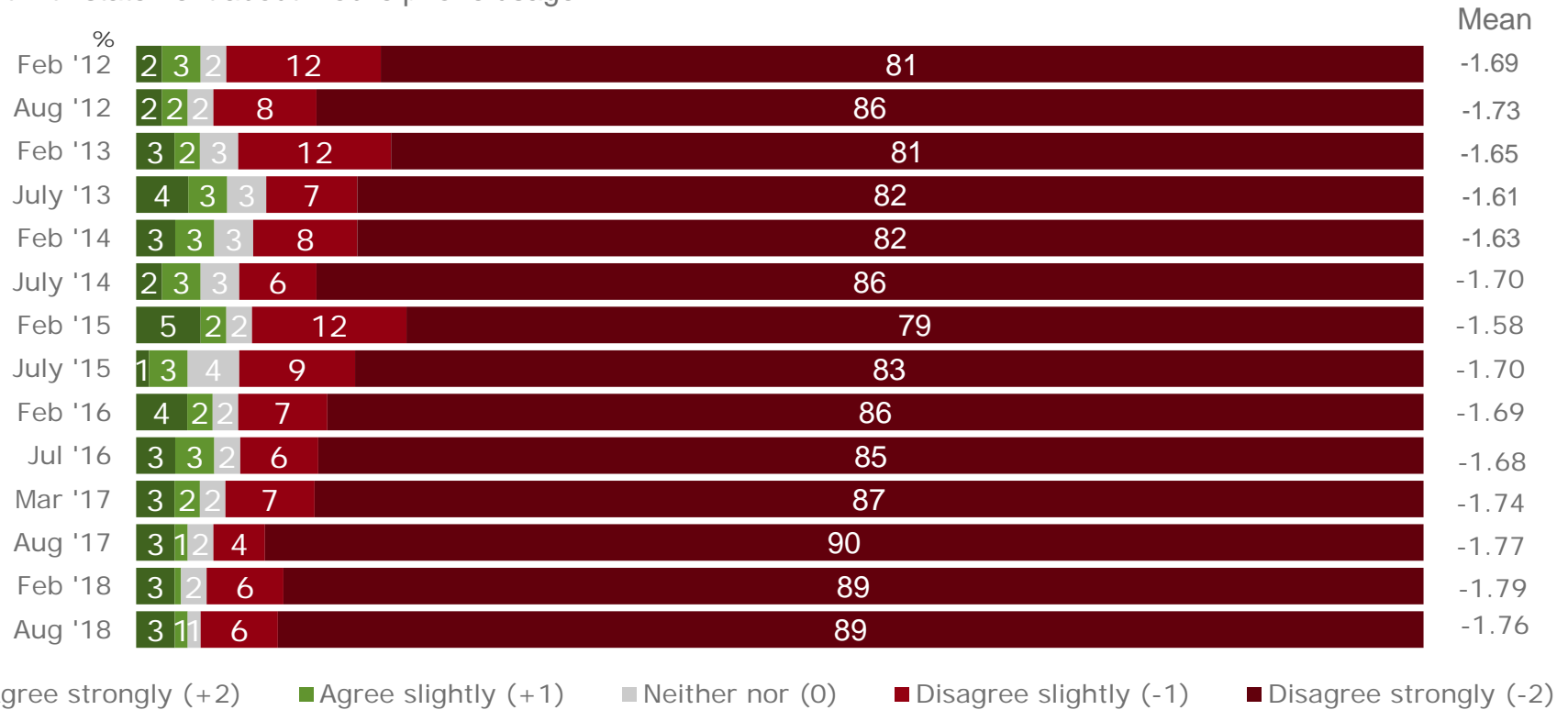


Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

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

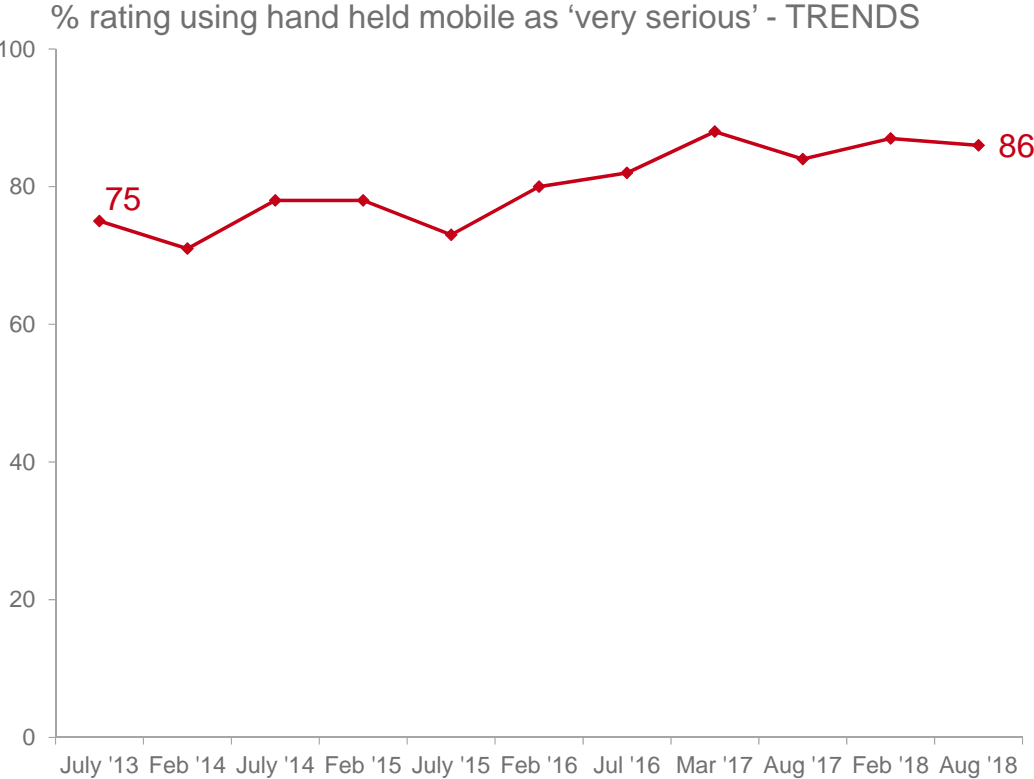
Agreement with statement about mobile phone usage

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

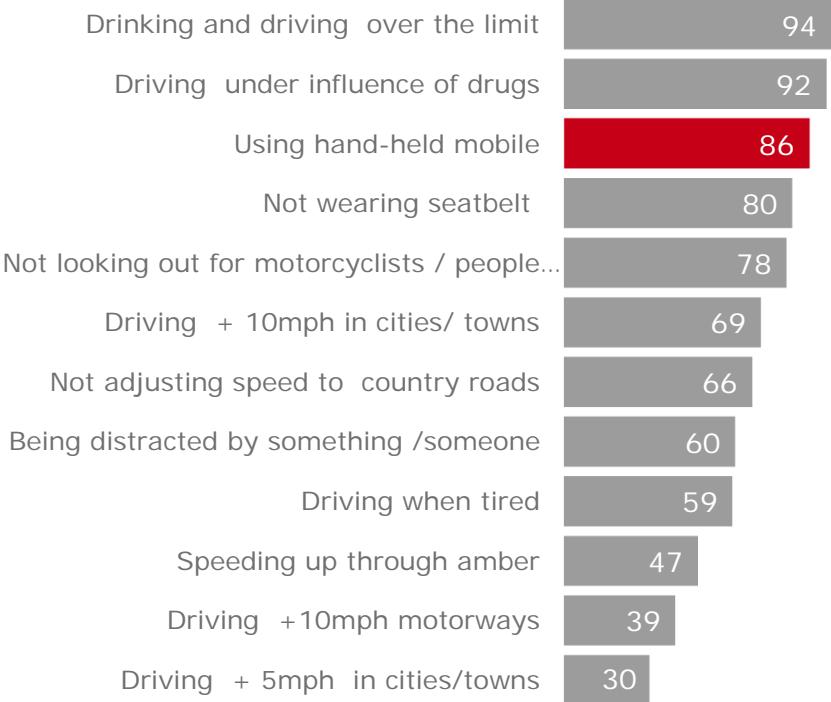


Base: All who hold a full driving licence for a car and drive nowadays at each wave
 Q4: How much do you agree or disagree that.....

The increasing perception that using a hand-held mobile creates a very serious risk appears to have stabilised, at a high level

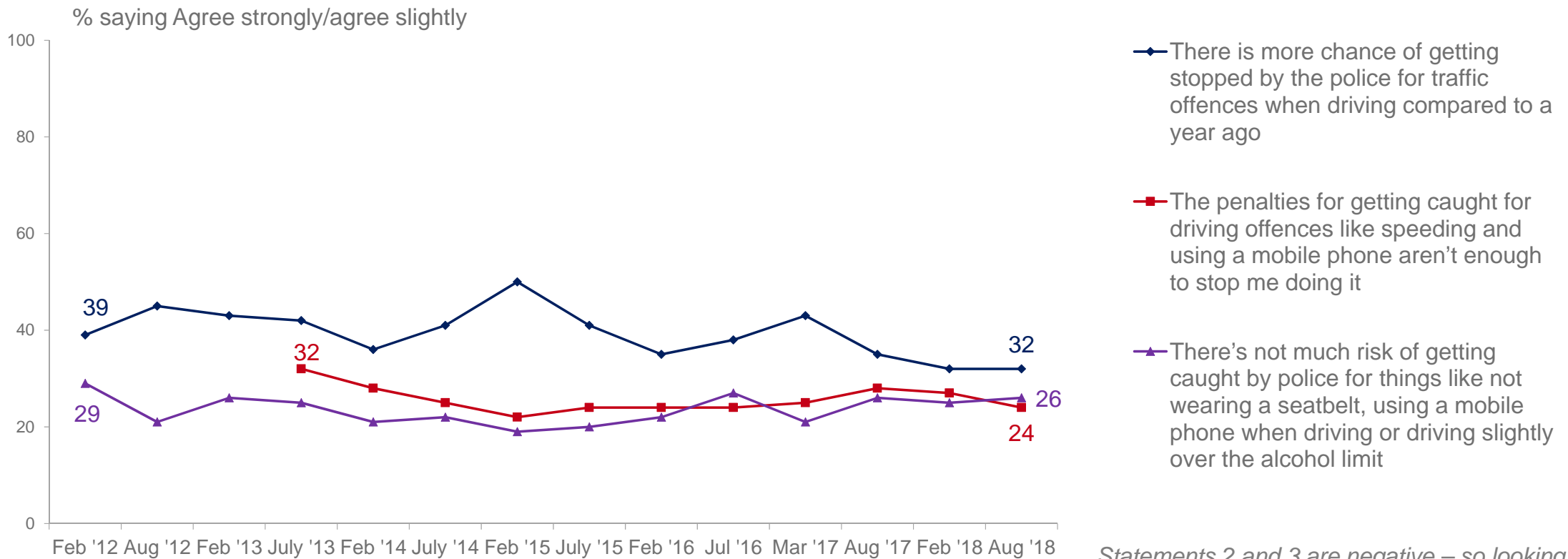


% rating as 'very serious' across all behaviours in August 18



Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 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 overall trend for the perception that you are more likely to be stopped by the police 'this year' remains downward. On other hand, there is also a very slight downward trend in agreement that the penalties are not a sufficient deterrent



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

5

Seatbelts

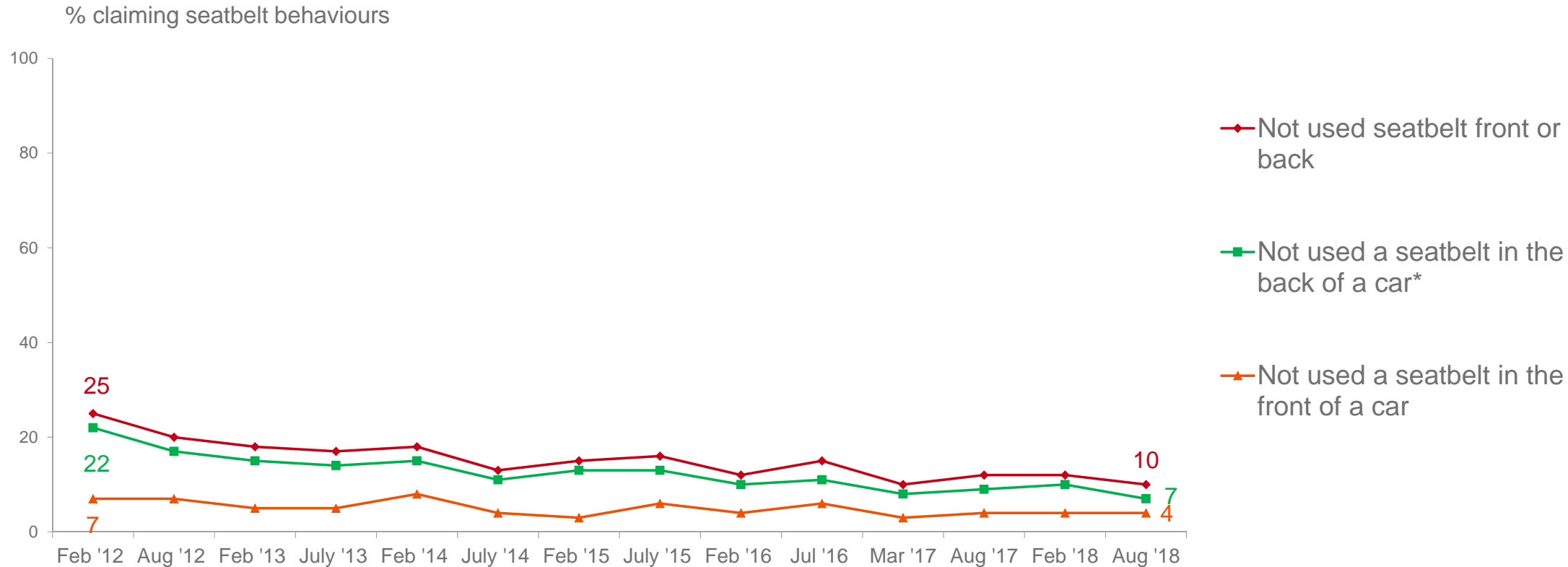
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

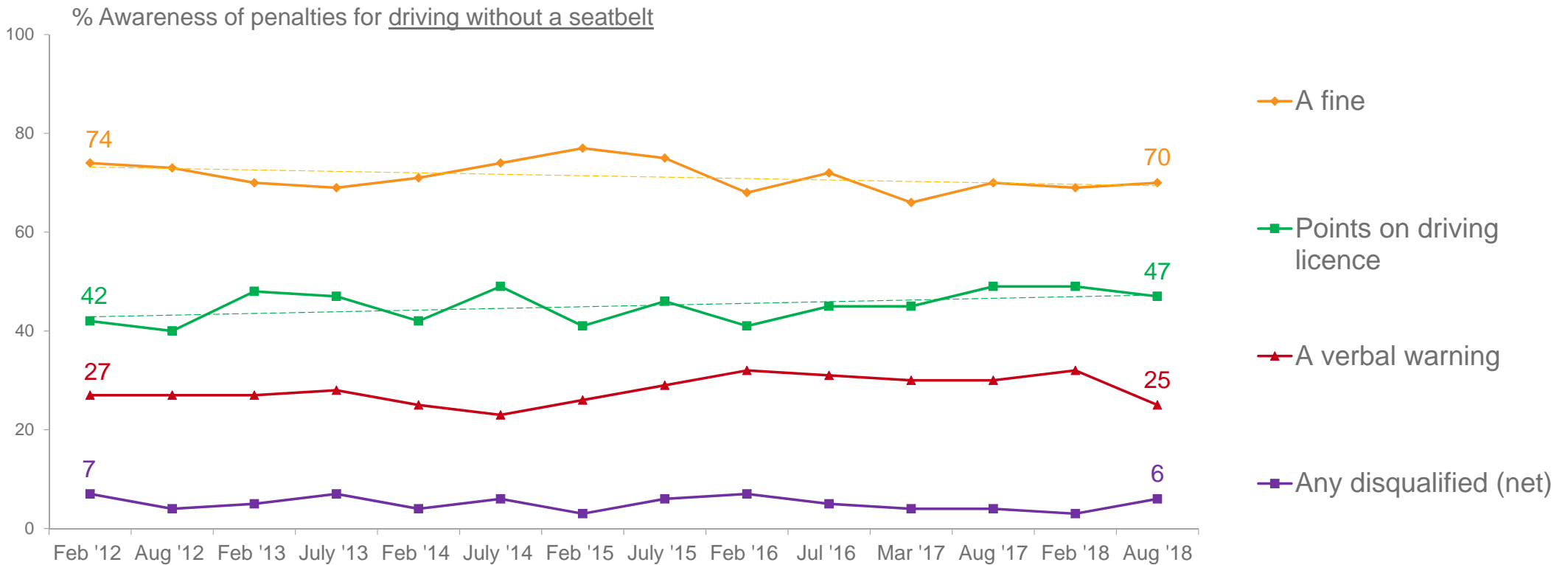
The number of drivers that do not wear a seatbelt when travelling in the back of a car continues to decline. A small percentage continue not to wear one in the front



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?

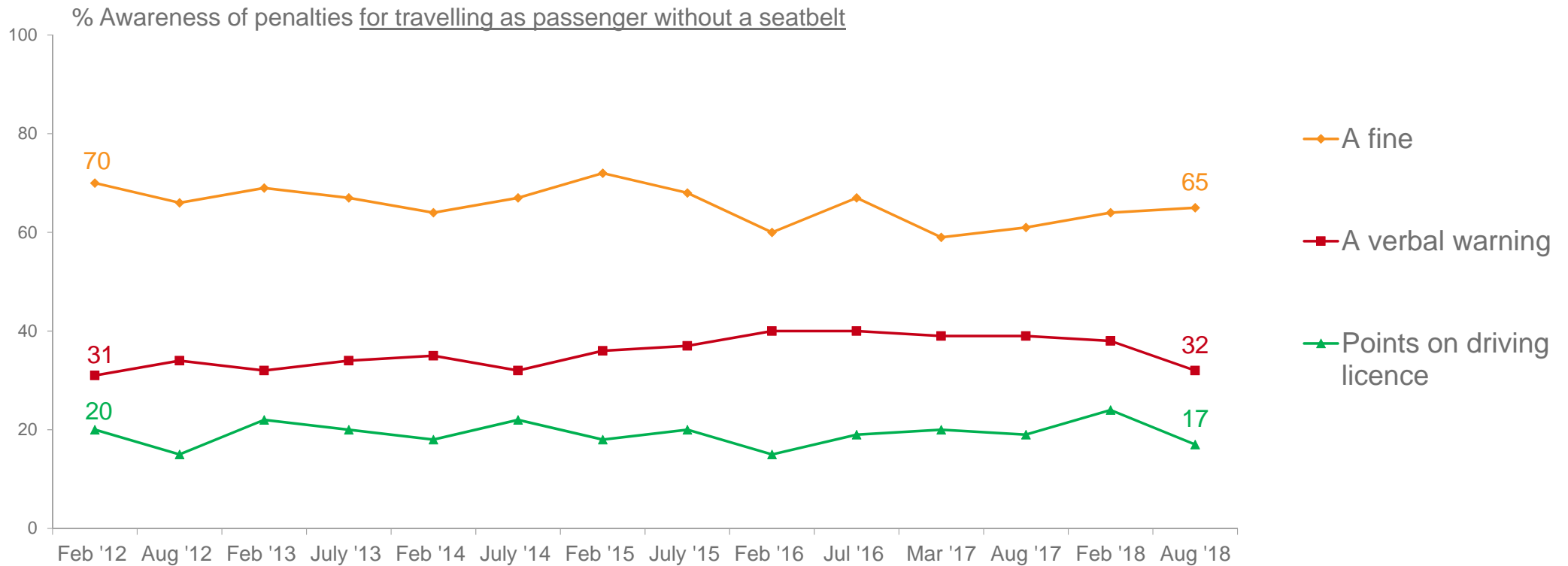
* 'When available' removed in July '16

The gap, between awareness of a fine as a penalty for not wearing a seatbelt when driving and points, is gradually decreasing. In past 6 months there has been a marked drop in mentions of a verbal warning



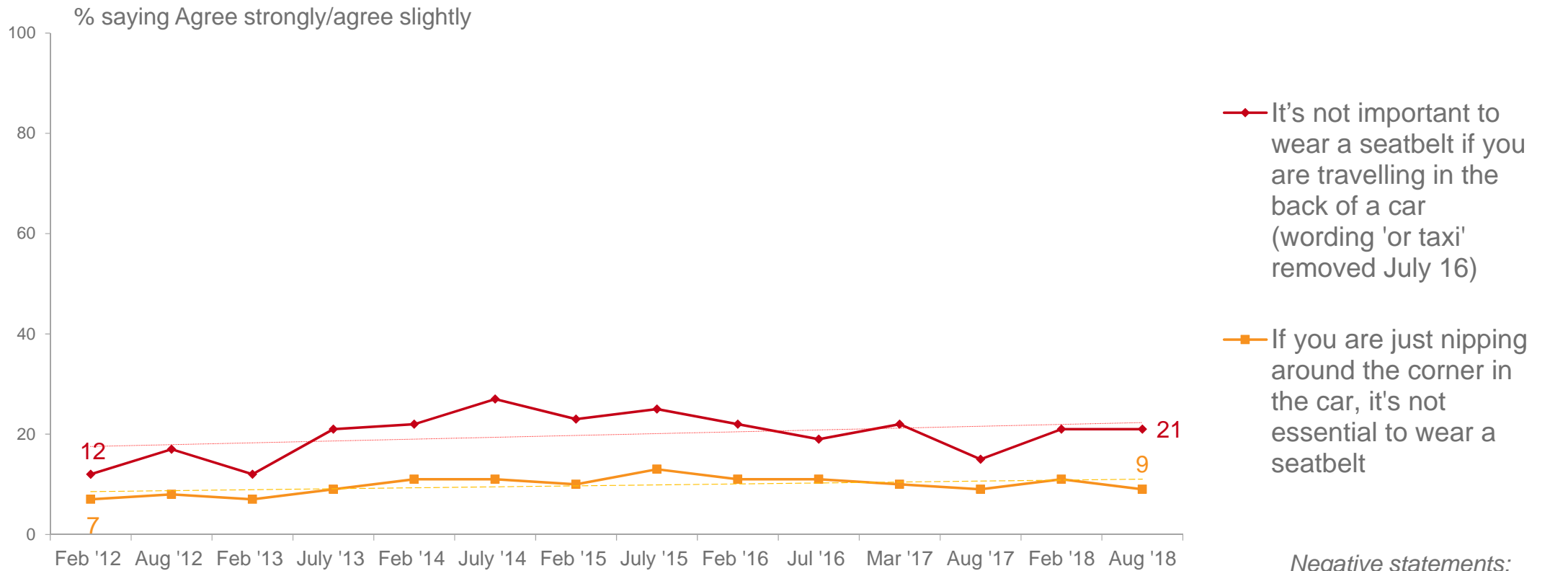
Base: All who hold a full driving licence for a car and drive nowadays
 Q8: What do you think are the penalties if a person is caught by the police for ...?

Similarly, a verbal warning for driving without a seatbelt when travelling as a passenger has dropped at latest wave; although longer term trend is upward



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 ...?

Despite falling trends on not wearing a seatbelt in the back, attitudes show a gradual softening towards the importance of doing so

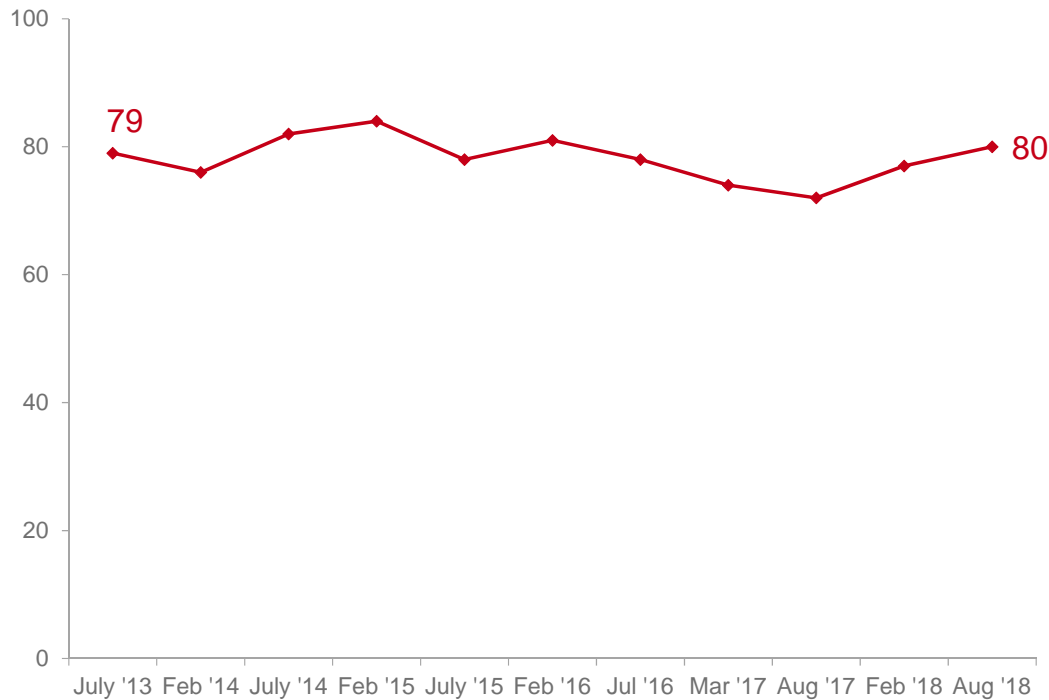


Base: All who hold a full driving licence for a car and drive nowadays
 Q4: How much do you agree or disagree that ...?

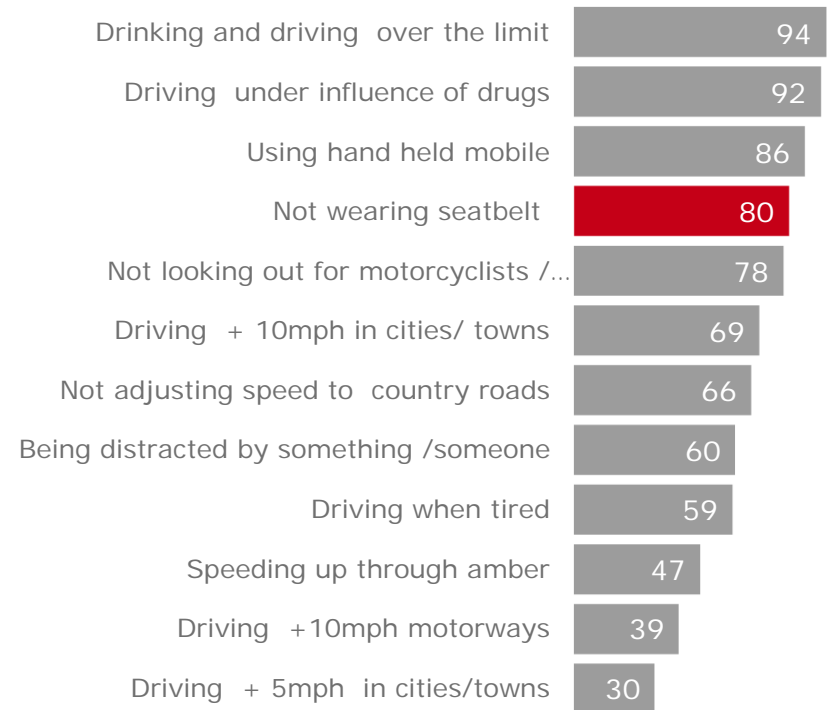
*Negative statements:
 decrease = improvement*

Until last year the perceived seriousness of not wearing a seatbelt in the back showed a slow decline, but is now back at previously high level

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



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



Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 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?

6

Vulnerable road users

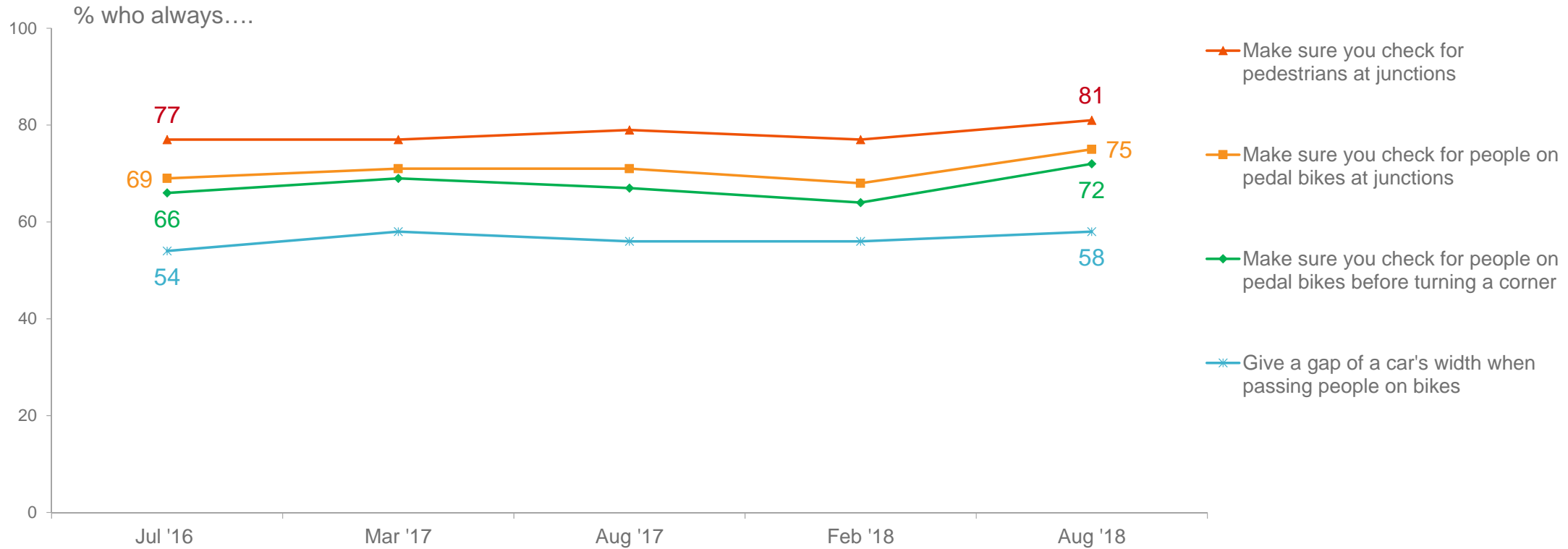
Behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

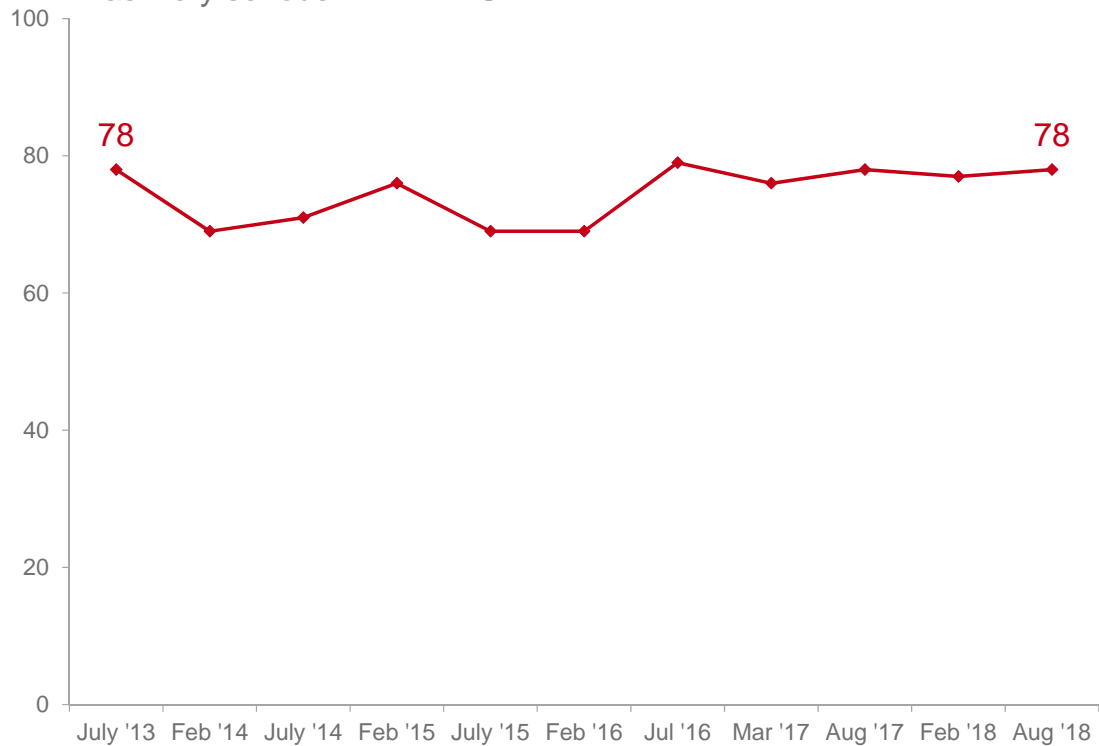
Consistent following of safe practice has increased at latest wave, especially with regard to paying attention to people on pedal bikes



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

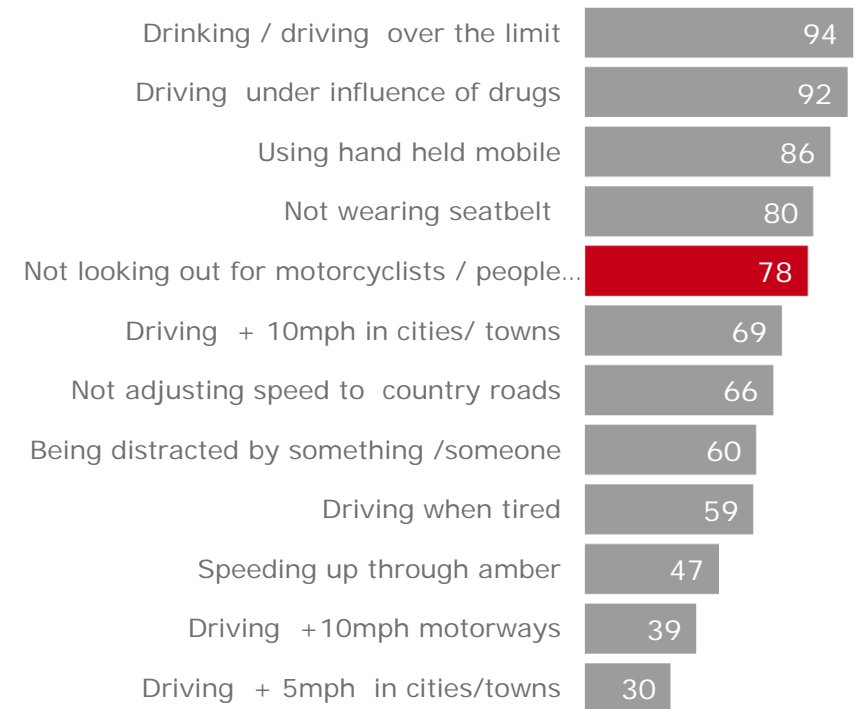
Since Feb '14 there has been a gradual increase in the perceived seriousness of not looking out for those on motor/pedal bikes at junctions

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

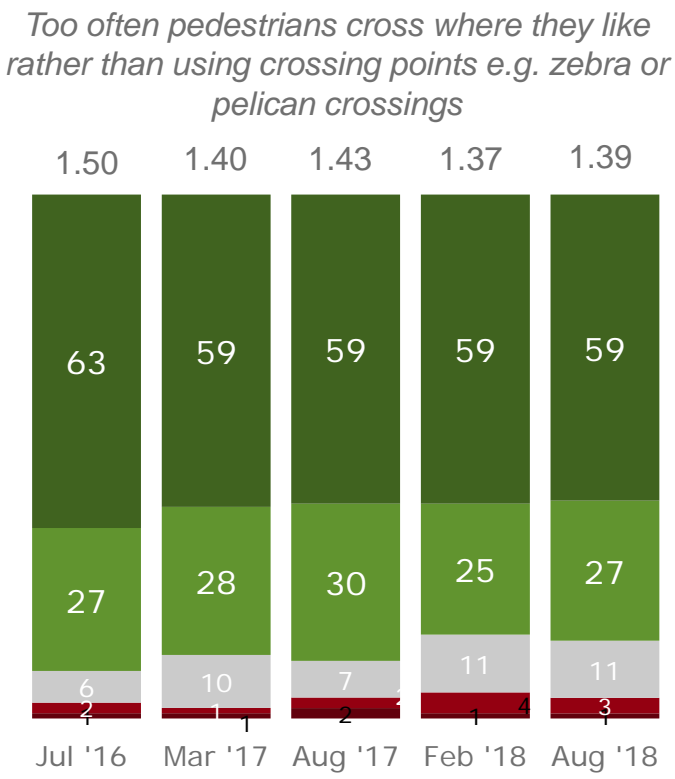
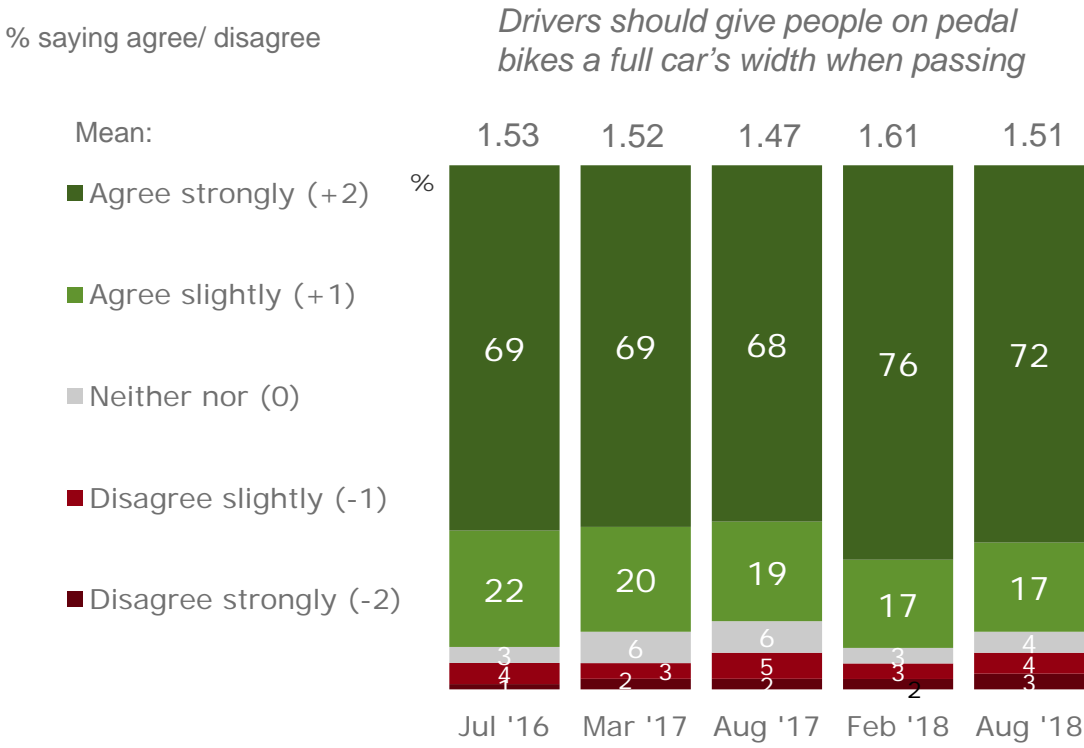


Base: All who hold a full driving licence for a car and drive nowadays at each wave (589 at Wave 17)
 Q5: How serious do you think each of these are in terms of the risks to the safety of drivers, their passengers and for other road users?

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

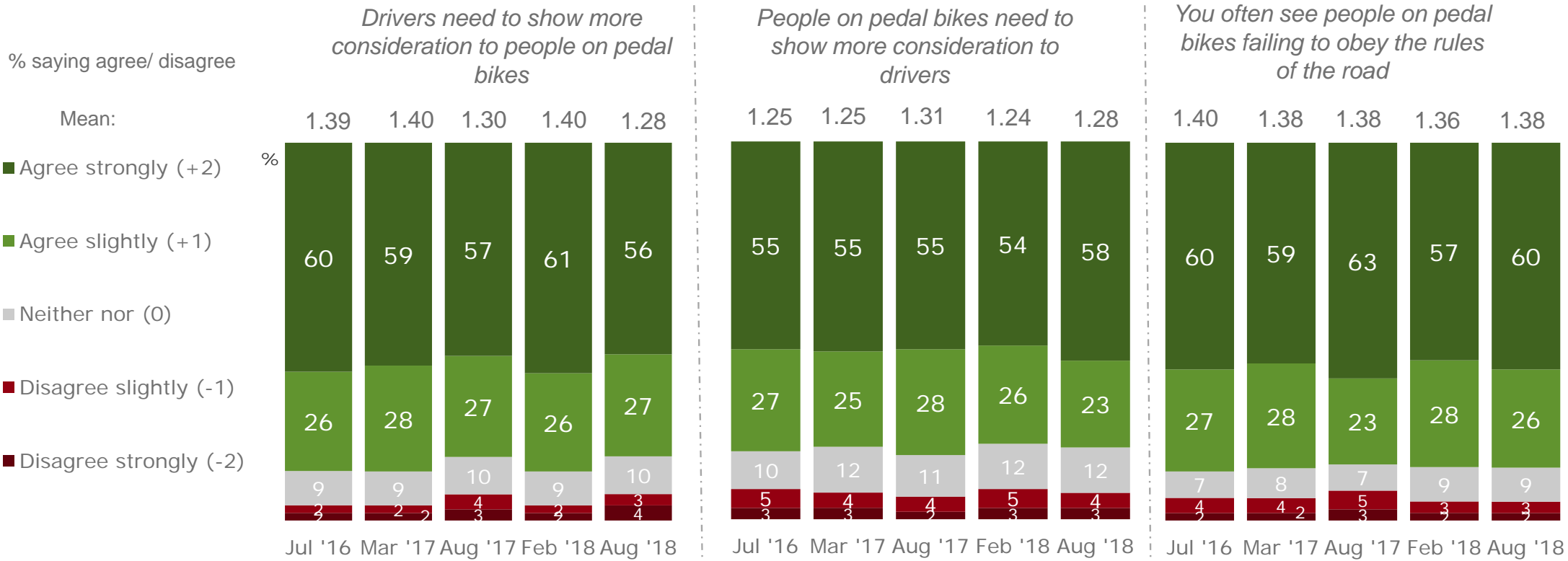


No clear trends on understanding the need to 'give a gap of a car's width when passing cyclists' or in belief that pedestrians 'too often use informal crossing points'



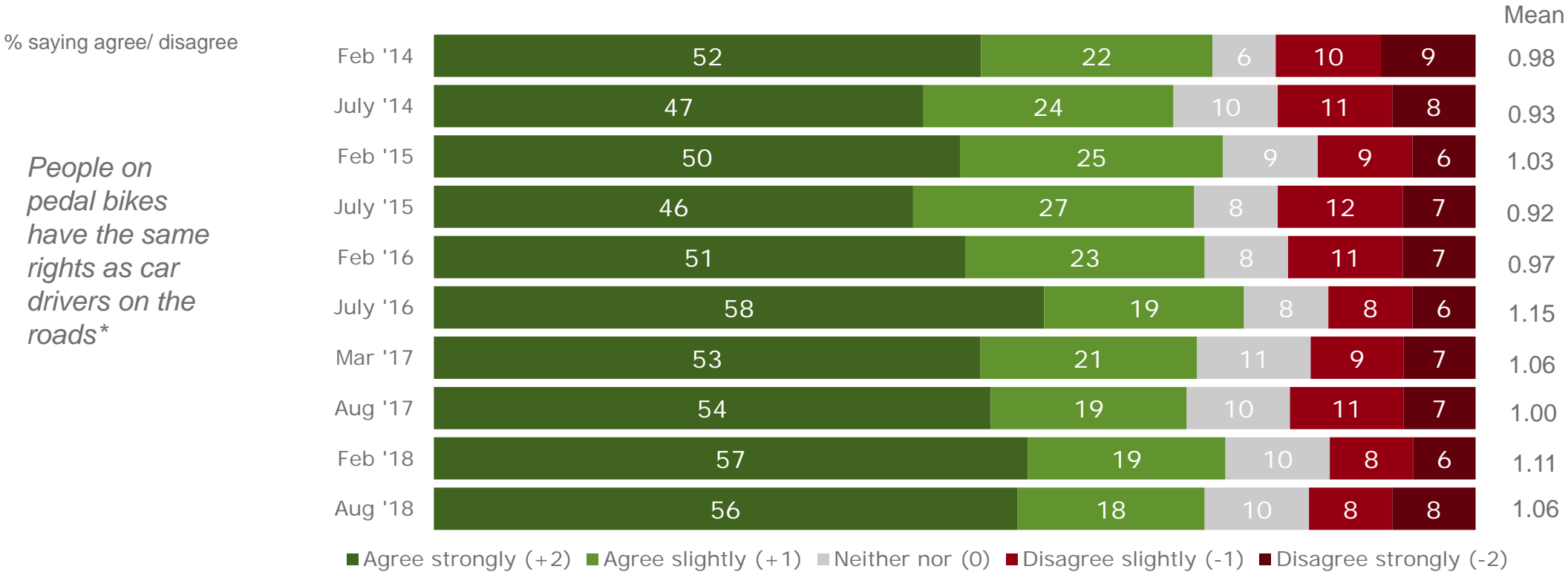
Base: All who hold a full driving licence for a car and drive nowadays at each wave
 Q4b: How much do you agree or disagree that.....

There are no emerging trends on these issues: support for greater consideration among drivers for those on bikes, and among people on bikes for drivers, remains widespread but not universal



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.....

Views on equal rights for people on bikes have remained constant since July '16 (when text changed from 'cyclists' to 'people on bikes'), with a significant proportion of drivers continuing to disagree



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'*

7

Distraction/Health/Age

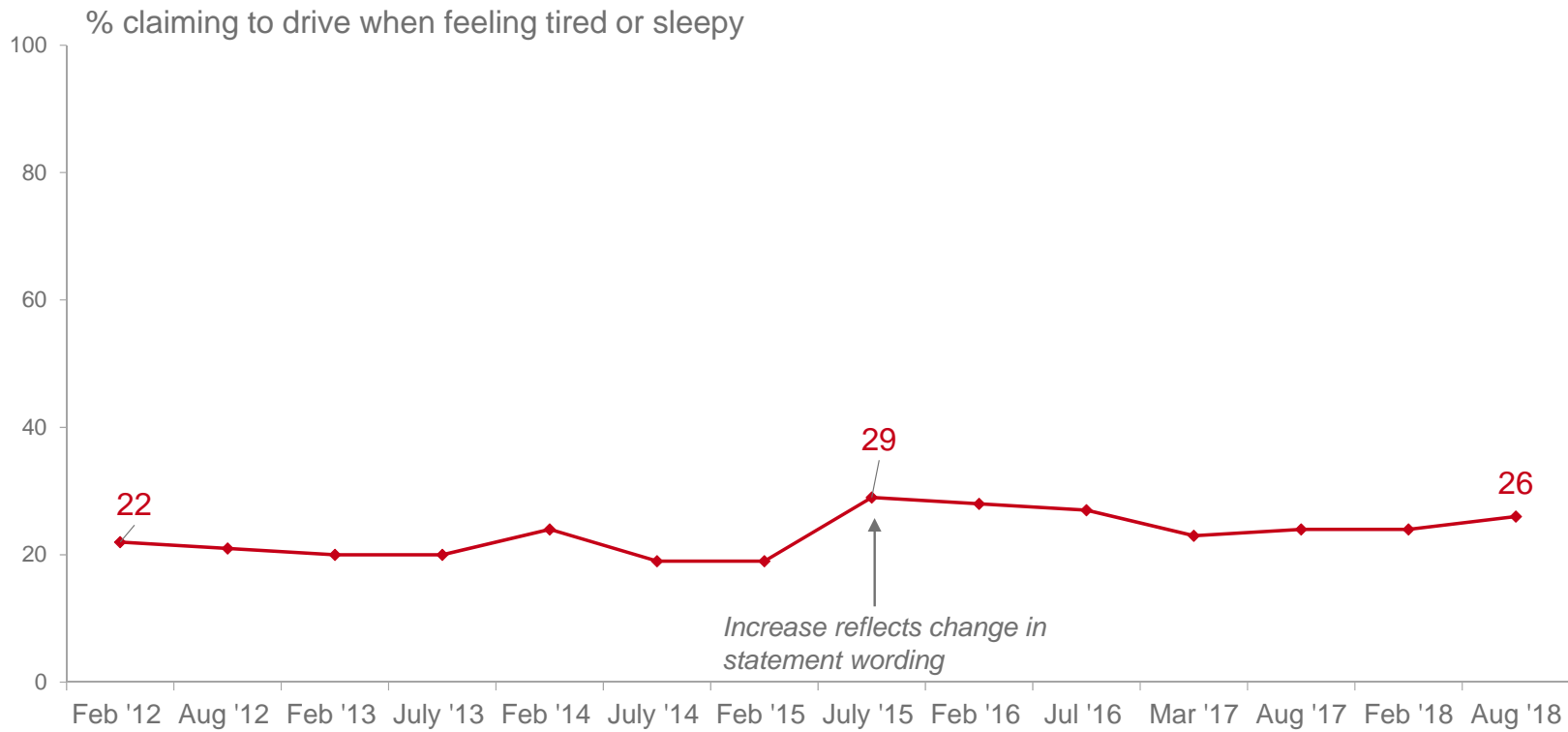
Claimed behaviours

Awareness of penalties

Attitudes

Perceptions of seriousness

The trend in claimed 'driving when tired/sleepy' has been very slightly downward since July '15; a quarter of drivers admitted to this at latest wave

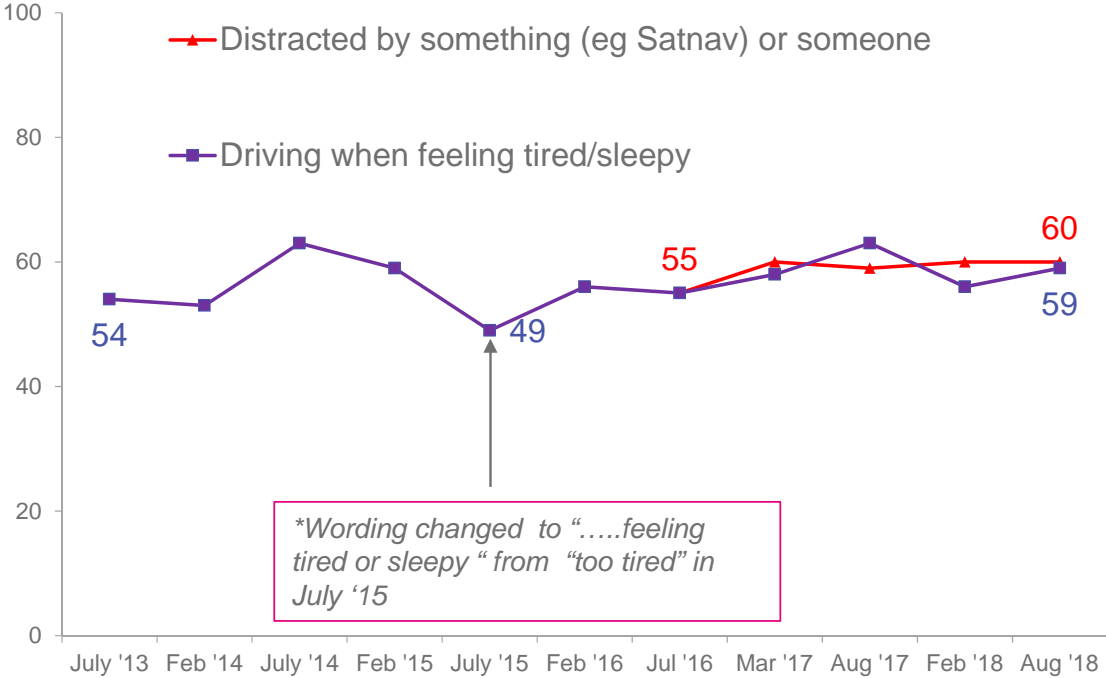


*Wording changed to ".....feeling tired or sleepy" from "too tired" in July '15

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?

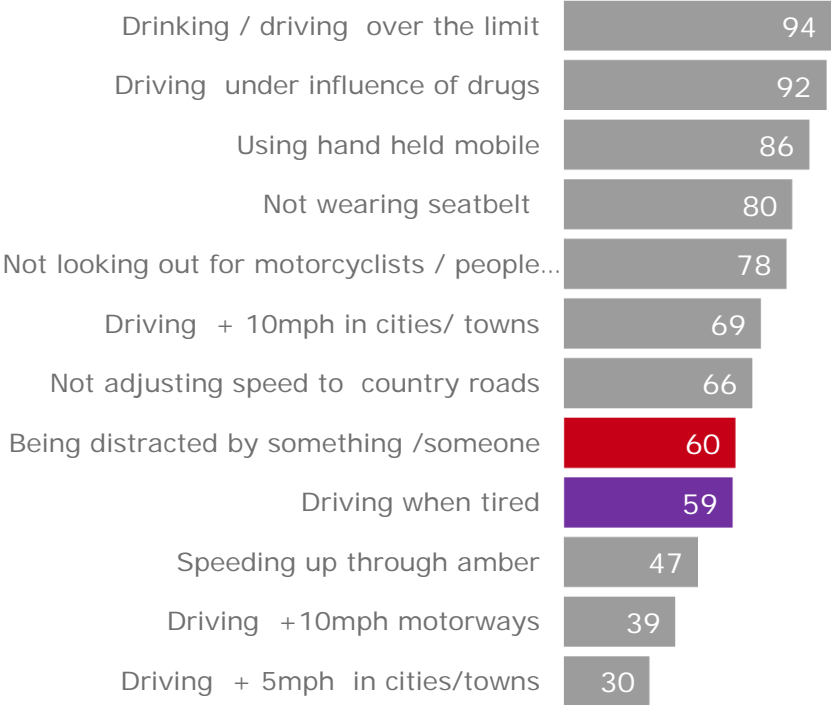
The perceived seriousness of driving when tired/sleepy continues to gradually increase, following the change in wording in July '15

% ratings of being distracted by something and by being tired as 'very serious'- TRENDS



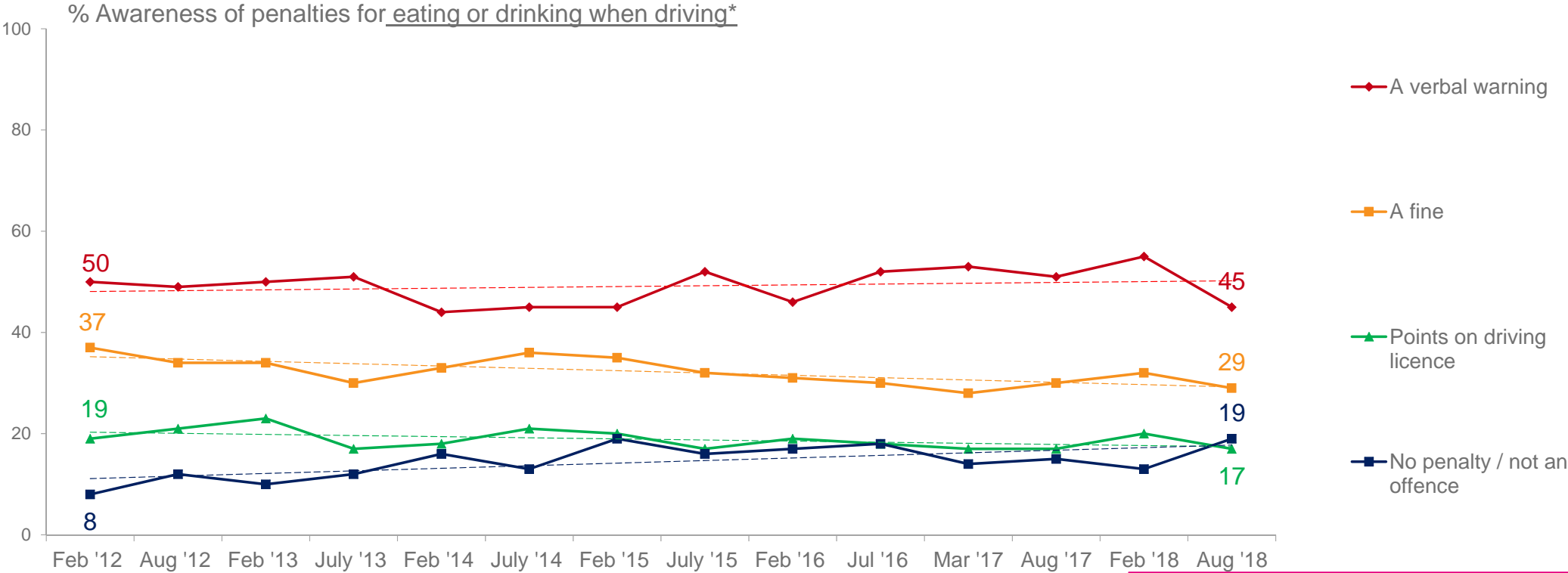
*Wording changed to "...feeling tired or sleepy" from "too tired" in July '15

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



Base: All who hold a full driving licence for a car and drive nowadays at each wave (5891 at Wave 17)
 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?

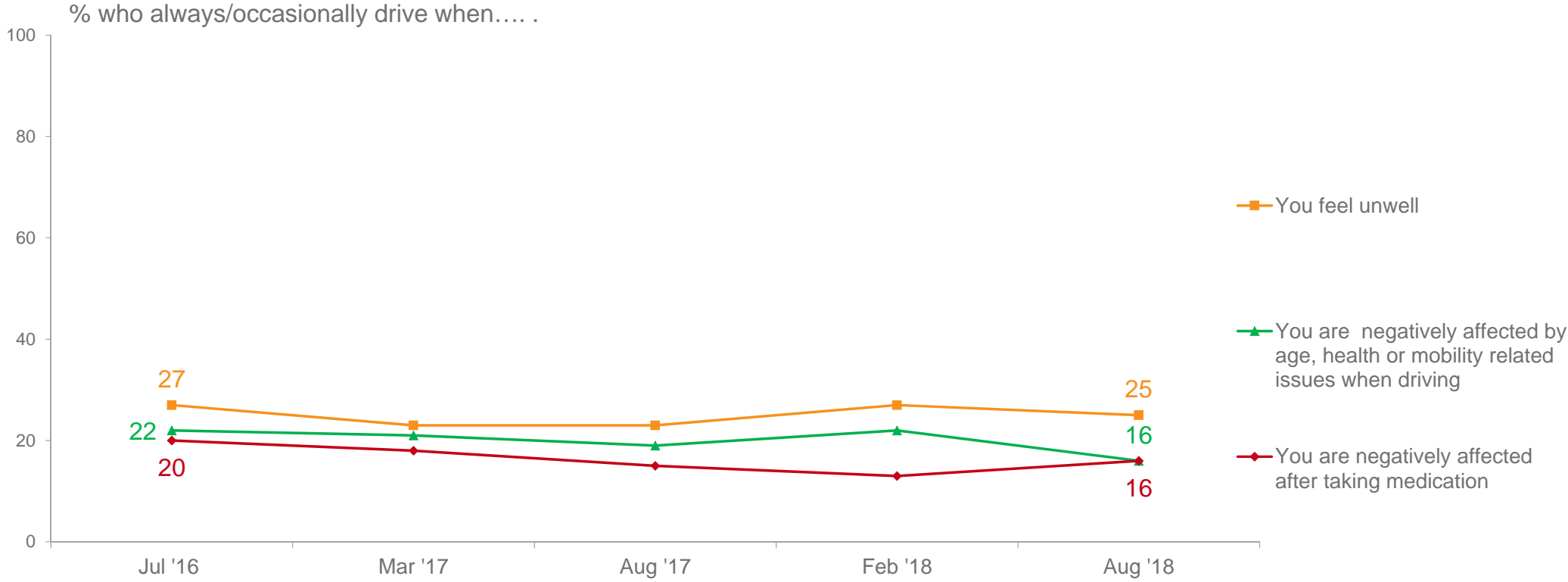
Awareness of points, and a fine in particular, are decreasing and accordingly there is a growing belief that eating/drinking when driving is not an offence



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*

Those claiming to drive when negatively affected after taking medication has seen a slight uplift, but the trend for this, and for driving when negatively affected by other personal issues, is downward



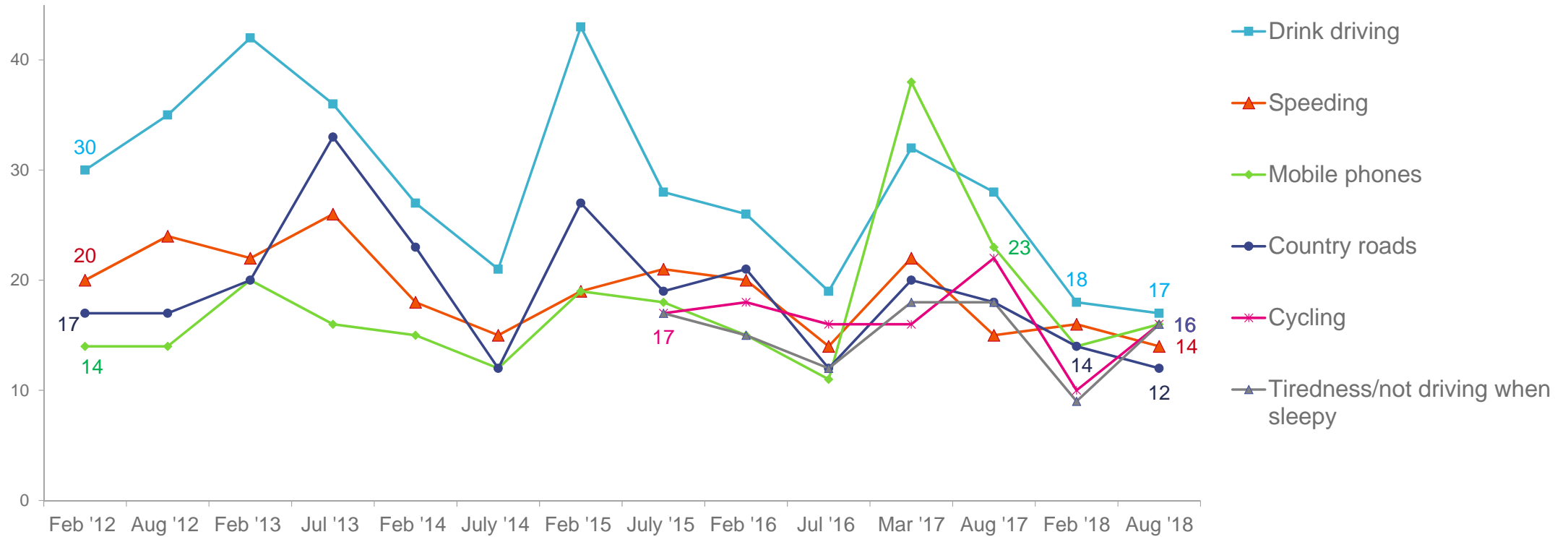
Base: All who hold a full driving licence for a car and drive nowadays; Aug '18 (589)
 Q8a: How frequently do you....?

8

Advertising and marketing awareness

Awareness of advertising on road safety topics generally remains at a low level – recall of ‘not driving when tired’ and ‘cycling’ achieved a slight uplift at latest wave

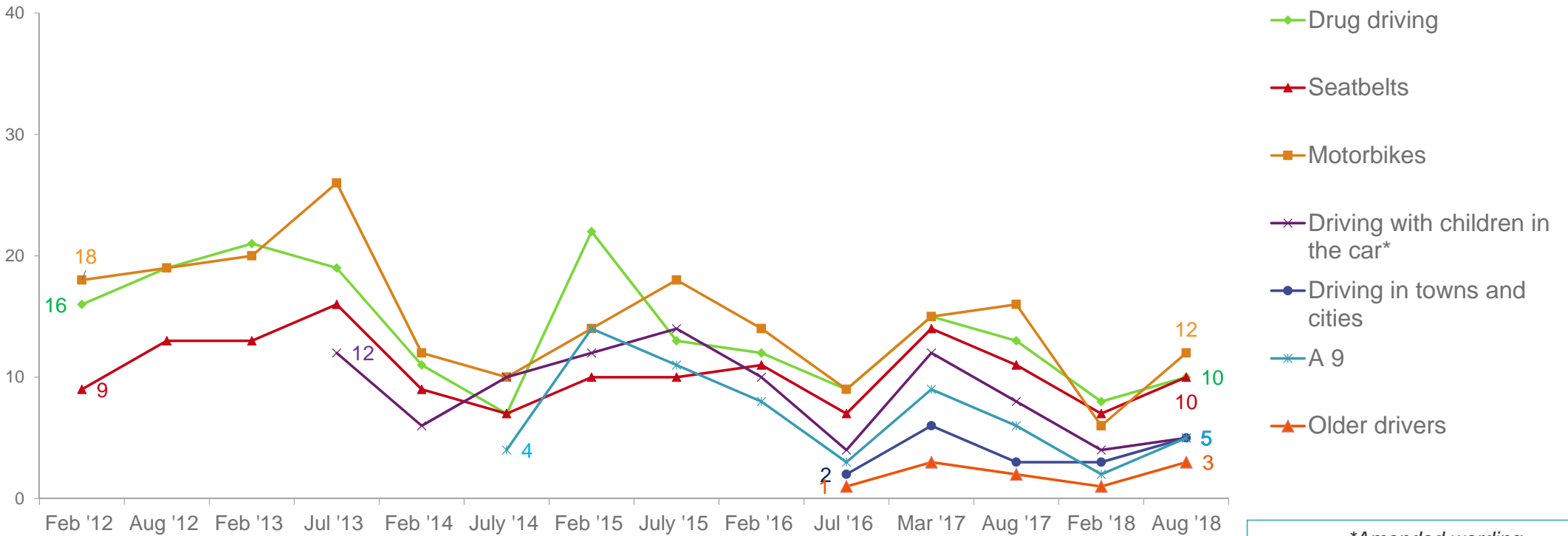
% driving / road safety advertising seen recently (spontaneous)



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?

Recall is higher across all these topics at latest wave, particularly for motorbikes, bringing top of mind awareness back to the levels recorded last year

% driving / road safety advertising seen recently (spontaneous)



*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

Key take-outs for priority topics – speeding, drink driving, seatbelts and mobile distraction

Speeding

Increasing **awareness of the risks** attached to speeding in urban areas may be helping to influence at risk speed behaviours: following a slight rise in these in the past 12 months, **trends have reverted to a downward path.**

The decline in claimed driving at 35mph in 30mph area continues despite **a growing association of a verbal warning as the penalty for this offence**, rather than points or a fine.

Drink & Drug driving

Views towards unacceptability of drink driving have been broadly similar since the change in the drink drive alcohol limit, with **no evidence that views are softening.**

Drink driving and drug driving also remain the behaviours considered to pose the most risks to drivers, passengers and other road users, with no signs of this diminishing.

Mobile phones

There had been signs of usage levels rising after dip created by increased penalties. However, latest figures indicate usage is falling again.

Decline likely helped by continued awareness of a fine and points as penalties, as opposed to a verbal warning, and continued high recognition of the dangers posed by this risk behaviour.

Seatbelts

Claimed non-wearing of a seatbelt has consistently declined since 2012.

However, promotion of need to wear one should be sustained, as evidence points towards a decreasing perception that it is required, especially when travelling in the back of a car.

10 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
August 2018	3 – 25 August 2018	589

Youth Boost – 17-25s

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

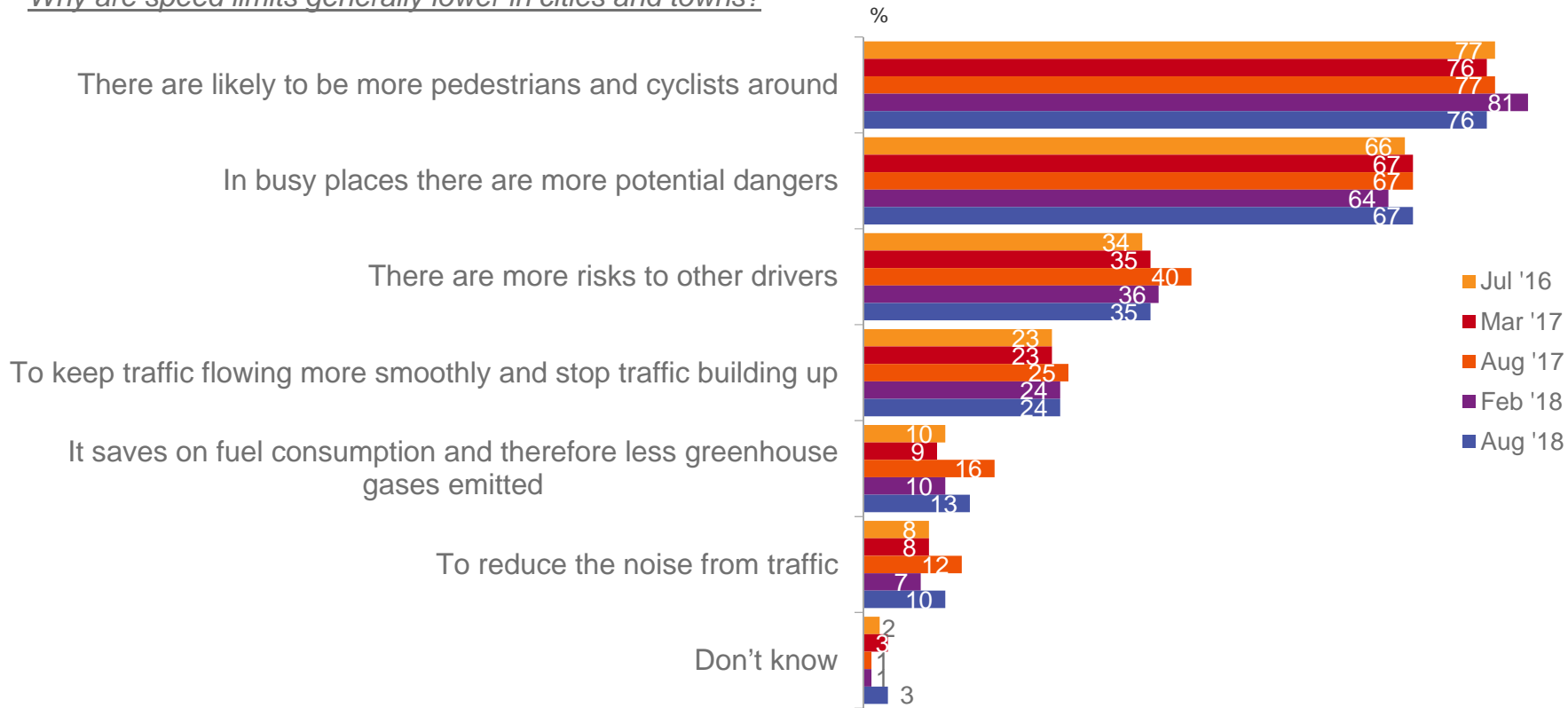
Demographic profile of active drivers in sample

		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) %	Aug '18 Un-wtd (589) %	Aug '18 Wtd (601) %
GEN- DER	Male	52	55	51	54	59	57	54	55	53	54	57	55	52	55	54	53	56	54	55	55
	Femal e	48	45	49	47	41	43	46	45	47	46	43	45	48	45	46	47	44	46	45	45
AGE	16-34	19	21	17	21	20	25	19	23	18	22	16	20	20	20	19	23	20	22	23	25
	35-44	12	22	17	20	14	19	16	18	12	19	14	17	16	18	11	17	14	18	15	19
	45-54	19	22	19	21	18	20	21	21	17	22	19	23	19	22	20	23	13	20	16	21
	55-64	21	17	20	19	20	17	15	18	20	18	21	18	21	18	17	16	17	17	18	17
	65+	29	18	27	20	28	19	29	19	19	33	19	30	21	25	21	32	21	36	23	28
SEG	ABC1	57	61	56	60	52	61	58	62	60	60	55	65	58	64	55	64	55	64	61	66
	C2DE	43	39	44	40	48	39	42	39	40	40	45	35	43	35	45	37	45	36	39	34
AREA	West	35	41	38	36	32	37	37	39	37	35	37	38	39	38	40	41	38	42	36	41
	East / South	35	34	38	39	42	39	35	34	44	40	43	37	30	37	30	31	34	30	30	30
	North	30	25	24	25	26	24	28	27	19	24	20	25	31	25	30	28	28	28	33	29

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

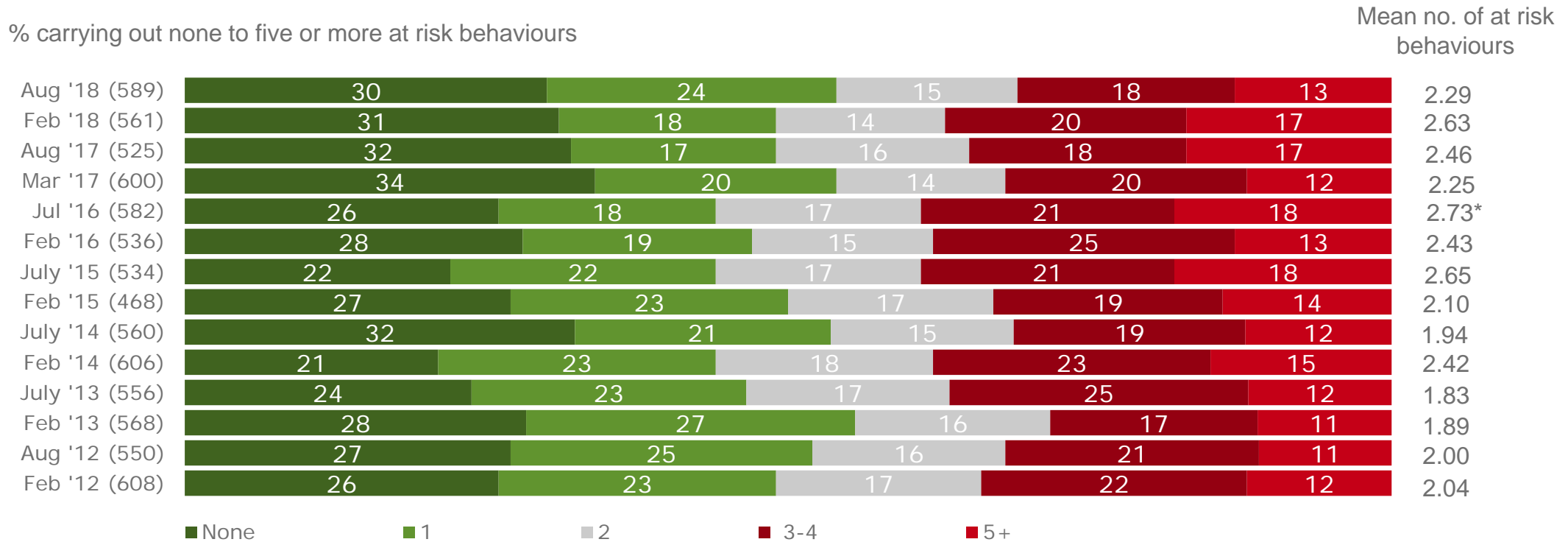
The latest findings are back in line with the earlier waves due to a slight fall in references to pedestrians and cyclists

Why are speed limits generally lower in cities and towns?



Base: All who hold a full driving licence for a car and drive nowadays; Jul '16 (582); Mar '17 (600); Aug '17 (525); Feb '18 (561); Aug '18 (589)
 Q8b: Why are speed limits generally lower in cities and towns?

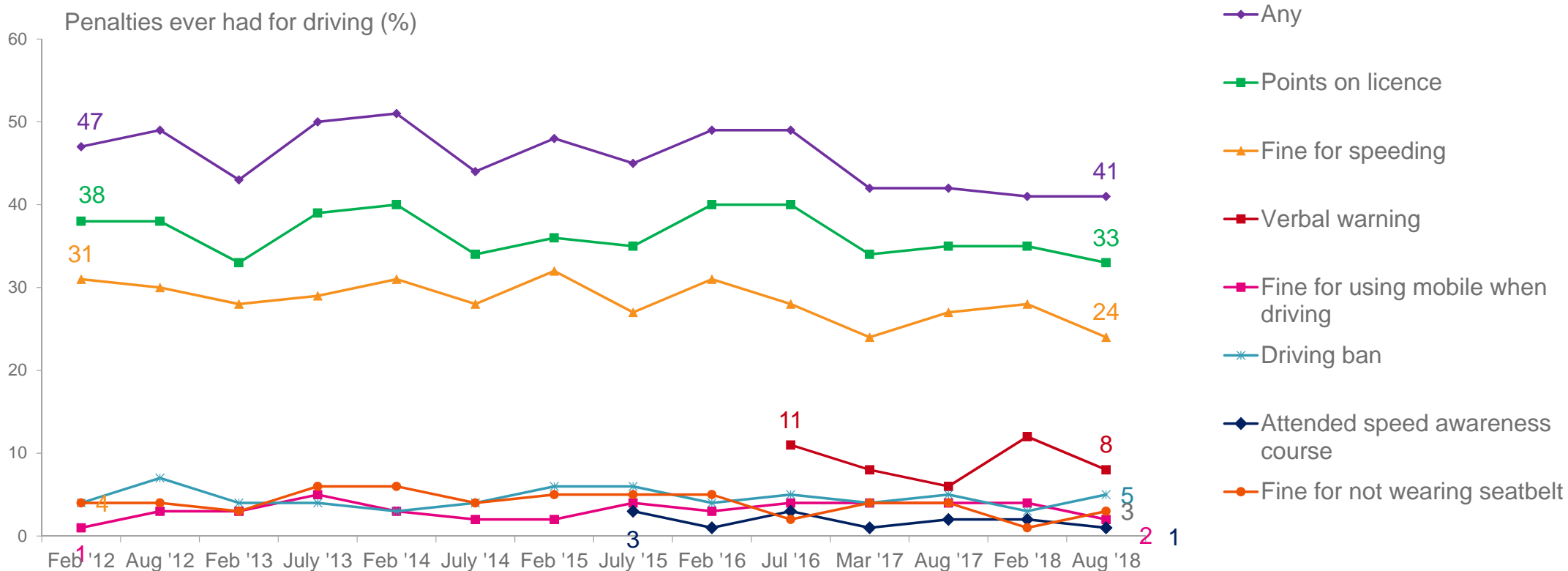
The latest figures show an increase in those not undertaking any, or only one, at risk behaviour – the reverse of the trend recorded in the past 12 months. Overall though, there is no clear pattern emerging



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

The proportion of drivers receiving any penalty has remained fairly consistent at recent waves, but receipt of a fine and points are trending gradually downwards



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