



The Road Safety Authority

Driver Attitudes & Behaviour Survey 2014

January 2015

Prepared for:



Údarás Um Shábháilteacht Ar Bhóithre
Road Safety Authority

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Contents

Driver Fatigue
Speeding
Motorists & Pedestrians
Motorcycles/Bicycles
Child Safety
Safety Cameras
Alcohol
Mobile Behaviour
Car Checks
Segmentation Analysis
Key Conclusions

Research Background & Objectives

- The National Survey of Driver Attitudes & Behaviour is a long standing cornerstone of the Road Safety Authority research programme. It provides the RSA with an annual asset of relevant information to guide their strategic decisions and the findings have also been used for a range of national and international papers and conference presentations.
- The research comprises an ad hoc survey which employs a quota controlled sample design, based on the JNRS, to deliver a nationally representative sample of 1,000 motorists aged above the national car licensing age (17 years+). All interviewing is conducted face to face in the home. The survey also included a booster sample (50+) of Motorcyclists.
- The key objectives of the research are to:
 - ❖ Establish the incidence of errant driving behaviour among Irish motorists (e.g. speeding)
 - ❖ Measure the extent of current driving habits that are proven to increase the risk of accidents (e.g. mobile phone usage).
 - ❖ Determine the attitudes of Irish motorists to a series of road safety measures (e.g. Safety Cameras).
 - ❖ Analyse the extent to which these attitudes and behaviours are consistent both across demographic criteria and over time.

Research Background & Objectives

- New topic areas included in the 2014 Driver Attitudes & Behaviour survey were:
 - ❖ Road Users attitudes and behaviours toward interacting with the LUAS
 - ❖ Child Safety in Cars
- All survey interviewing was conducted in December 2014.

Motorists Profile

Base: All Motorists N-1,061

		%			%
Gender	Male	51	Region	Dublin	27
	Female	49		Leinster	28
Age	-24	8		Munster	26
	25-34	23		Conn/Ulster	20
	35-49	33	Area	Urban	57
	50-64	23		Rural	43
	65+	13			
Social Class	ABC1	43			
	C2DE	48			
	F	9			

Motorists Profile

Base: All Motorists N-1,061

		%			%
Vehicle Type	Motorcycle	3	Length of Time Driving	Under 2 years	4
	Car	94		2-5 years	8
	Van	7		6-10 years	17
	P.S.V. (minibus)	0		11-20 years	27
	P.S.V. (bus)	0		21-30 years	16
	Truck	1		31+ years	27
Licence Type	Learner licence	7	Roads Used	Don't know	1
	Full licence - Irish issued	90		Mostly around urban/suburban areas	30
	Full licence - other country issued	3		Mostly on country roads	20
				Mostly on major roads/motorways	4
			Mix of all three (urban areas/country roads/motorways)	46	

Driver Fatigue



Driving Fatigue

Base: All Motorists N-1,061

Ever Fallen Asleep While Driving %

11

276,000 motorists

Highest among:

Drive for work 18%
Driven after alcohol (past 12 mths) 19%

What Do You Do if Sleepy While Driving?



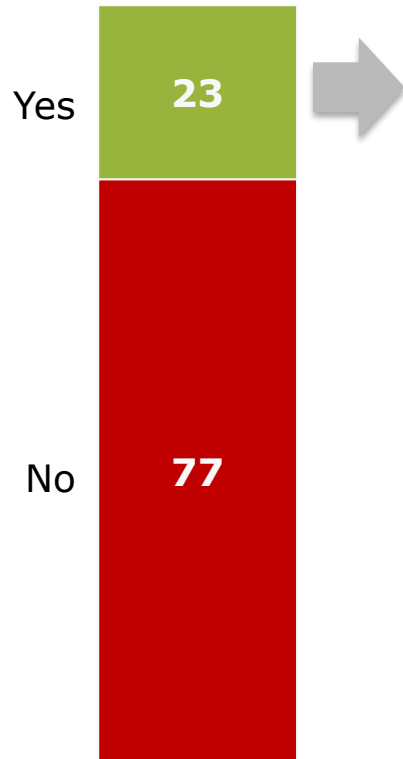
Over 1 in 10 motorists have fallen asleep at the wheel. Key corrective actions are to pull over and rest; and opening the car window.

- Q. Have you ever fallen asleep or nodded off (even if for only a brief moment) while driving?
- Q. If you do feel sleepy while driving, what if anything do you do?

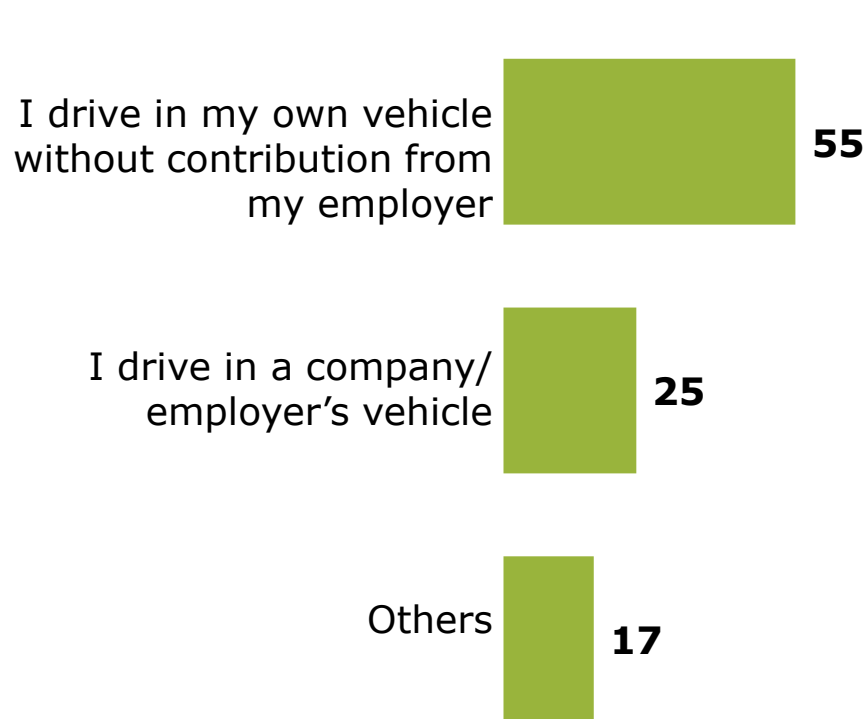
Driving for Work

Base: All Motorists in Employment N – 647 (61%/1,595,000)

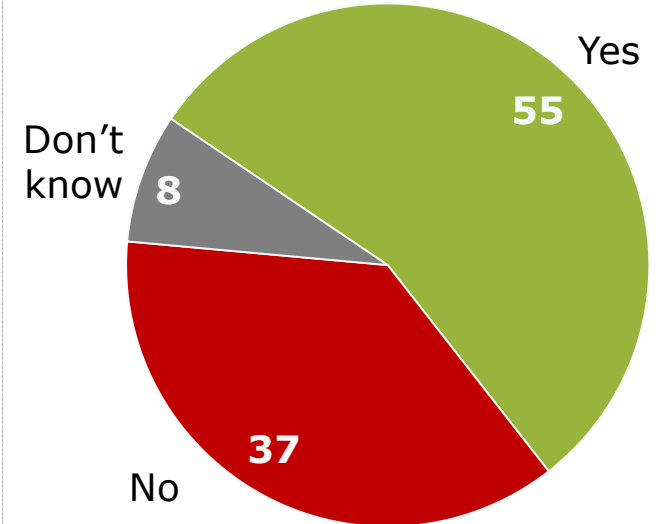
Drive During Work
%



How Vehicle is Used
%



Does Employer have Health & Safety Policy on Driving
%



Separately, only 1 in 5 self employed have such a policy.

23% of motorists in employment "drive for work" and most receive no contribution from their employer. Just over half of employers are understood to have a health and safety policy on driving.

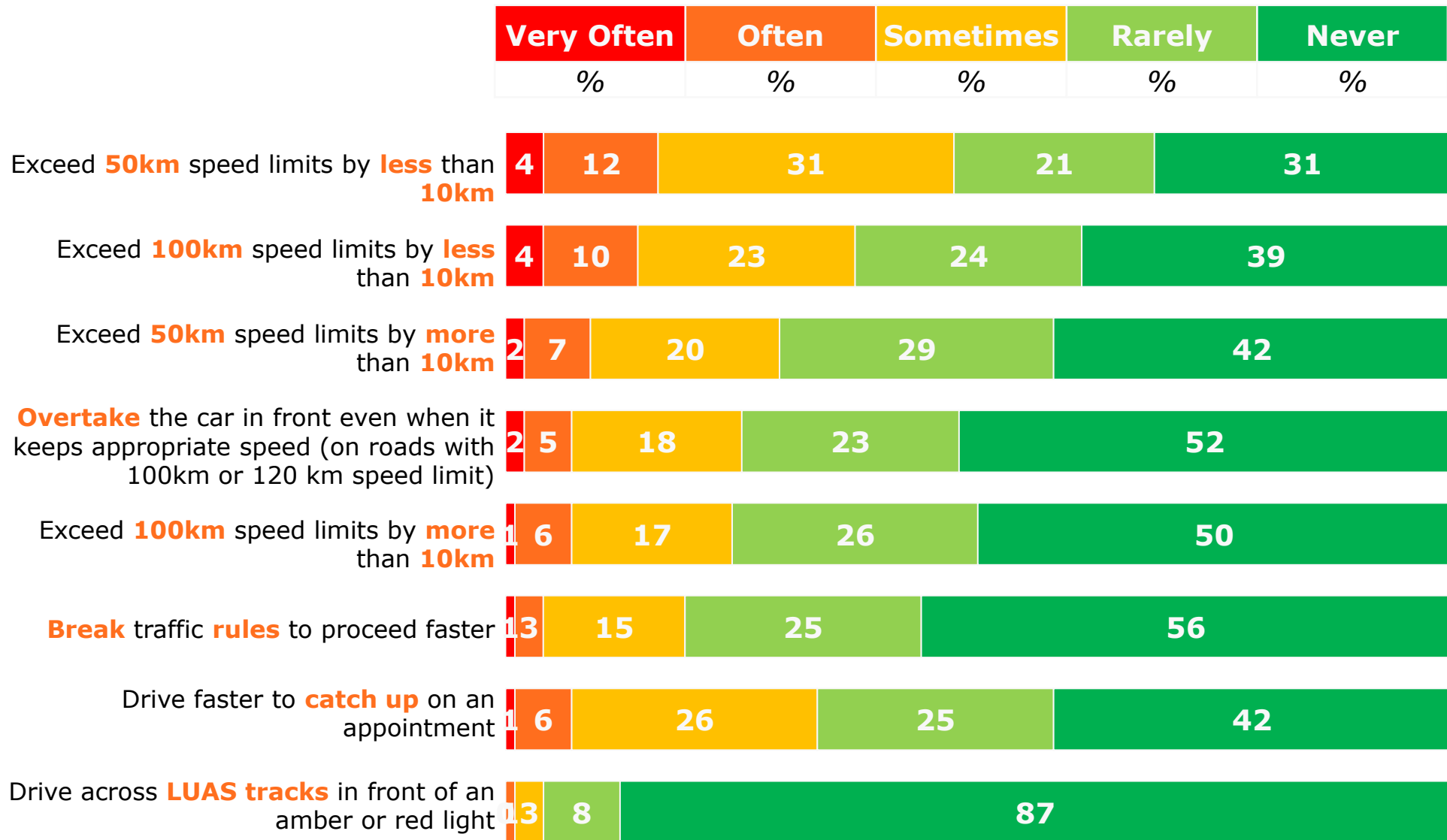
- Q. Do you drive during work (for any length of time), i.e. is it a requirement of your job outside of commuting?
- Q. Which of these best describe how you use your vehicle for work?
- Q. Does your employer have a health & safety policy on driving for work, (which may cover rest breaks while driving, use of mobile phones while driving, reporting of accidents etc.)?
- Q. Do you have a health & safety policy on driving for work (which may cover rest breaks while driving, use of mobile phones while driving, reporting of accidents etc.)?

Speeding



Speeding & Rule Violation

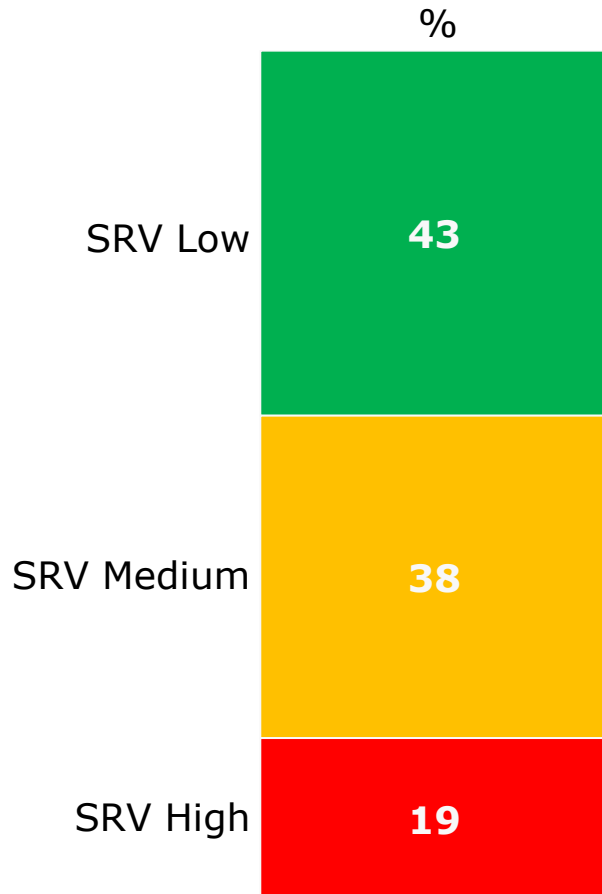
Base: All Motorists N-1,061



Q. How often do you.....on a scale of 1 to 5, where 1 is 'VERY often' and 5 is 'never'?

Speeding & Rule Violation: Composite Score (Low/Medium/High)

Base: All Motorists N-1,061



<i>SRV Composite Score – Weighting Matrix</i>					
	<i>Very Often</i>	<i>Often</i>	<i>Sometimes</i>	<i>Rarely</i>	<i>Never</i>
<i>Exceed 50km speed limits by less than 10km</i>	4	3	2	1	0
<i>Exceed 50km speed limits by more than 10km</i>	6	4.5	3	1.5	0
<i>Exceed 100km speed limits by less than 10km</i>	4	3	2	1	0
<i>Exceed 100km speed limits by more than 10km</i>	6	4.5	3	1.5	0
<i>Overtake the car in front even when it keeps appropriate speed (on roads with 100km or 120 km speed limit)</i>	4	3	2	1	0
<i>Break traffic rules to proceed faster</i>	6	4.5	3	1.5	0
<i>Drive faster to catch up on an appointment</i>	4	3	2	1	0
<i>Drive across LUAS tracks in front of an amber or red light</i>	6	4.5	3	1.5	0

Speeding & Rule Violation: Composite Score x Demographics

Base: All Motorists N-1,061

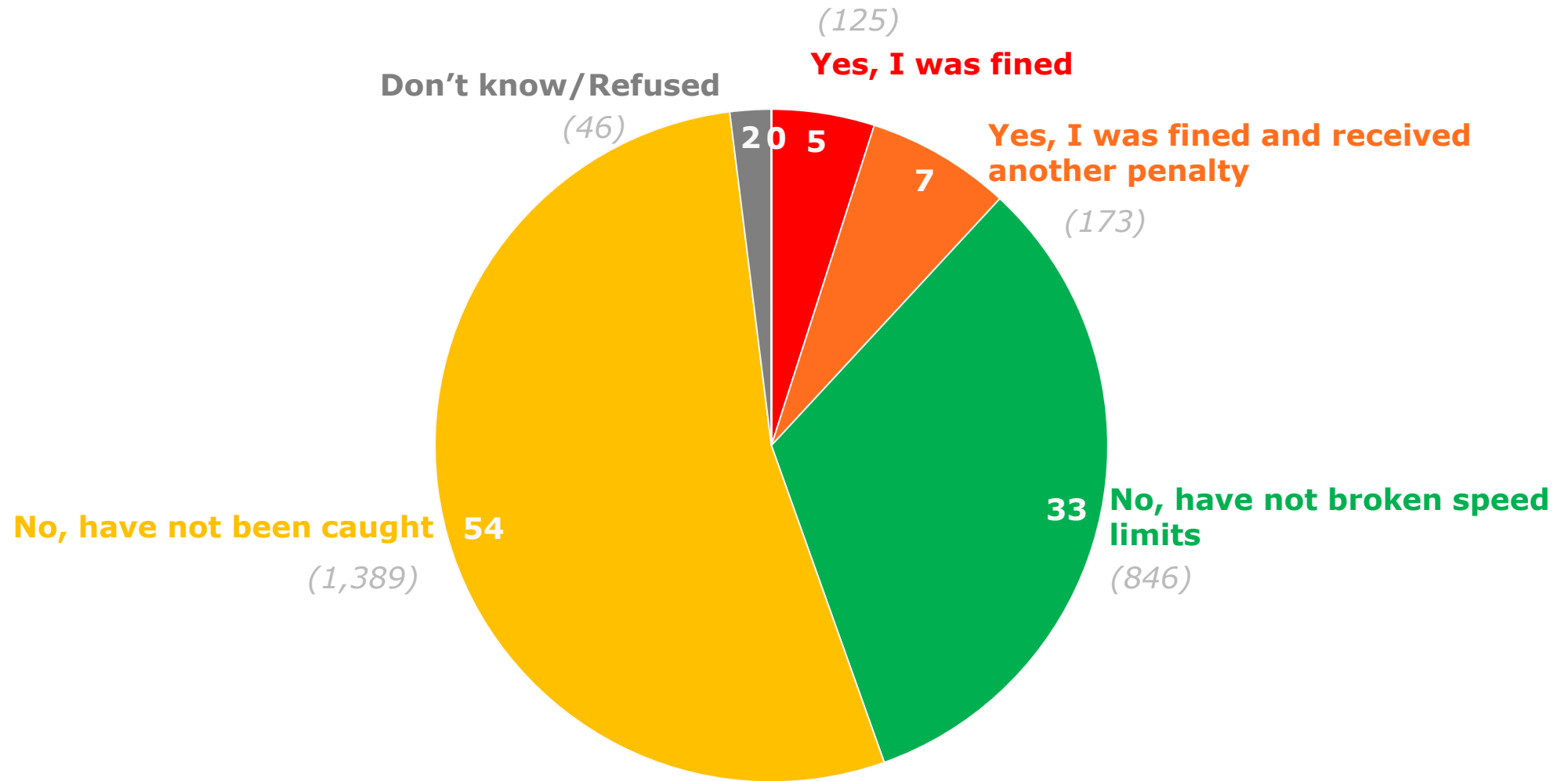
	Total	Gender		Age					Social Class			Region				Area	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base:	1061	567	494	90	231	345	253	142	437	550	74	310	271	294	186	681	380
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
SRV Low	43	34	52	34	29	37	51	73	39	48	33	50	38	38	45	45	40
SRV Medium	38	39	37	34	45	41	36	23	37	37	47	34	41	42	35	38	38
SRV High	19	27	11	32	26	22	13	4	24	15	20	16	21	21	20	17	22

The SRV High Group over indexes among younger males and ABC1s.



Speeding Fines (Past 3 Years)

Base: All Motorists N-1,061



(000's pop. est.)

Speeding Fines (Past 3 Years)

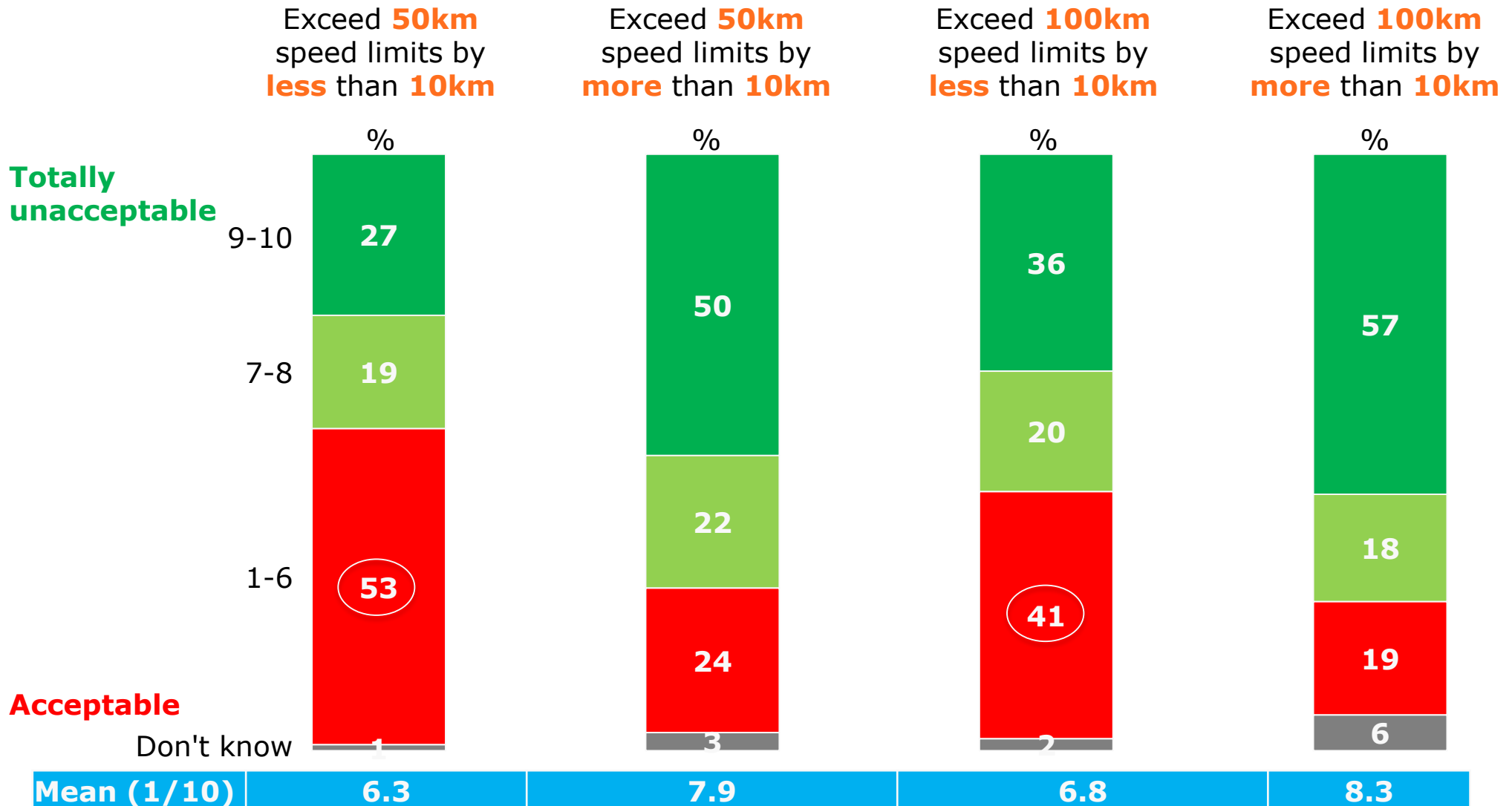
Base: All Motorists N-1,061

	Total	Speeding & Rule Violation		
		SRV Low	SRV Medium	SRV High
<i>Base:</i>	1,061	460	396	205
	%	%	%	%
Yes, I was fined	5	2	3	14
Yes, I was fined and received another penalty	7	2	8	14
No, have not broken speed limits	33	58	18	4
No, have not been caught	54	36	68	67

Record of speeding fines and punishments are much more evident among the SRV High group: 28% of this group have been fined or punished for speeding in past 3 years.

What Level of Speeding is Acceptable?

Base: All Motorists N-1,061



Q. I am now going to read out some various types of driving behaviour and for each one, I would like you to tell me how acceptable or unacceptable you think it is for drivers to do these things. A score of one means you think the behaviour is totally acceptable and a score of ten means you think it is totally unacceptable.

What Level of Speeding is Acceptable?

Base: All Motorists N-1,061

Scores 1-6 Acceptable	Total	Statements			
		Exceed 50km speed limits by less than 10km	Exceed 50km speed limits by more than 10km	Exceed 100km speed limits by less than 10km	Exceed 100km speed limits by more than 10km
Exceed 50km speed limits by less than 10km	53%	100%	92%	94%	90%
Exceed 50km speed limits by more than 10km	24%	43%	100%	46%	85%
Exceed 100km speed limits by less than 10km	41%	74%	77%	100%	90%
Exceed 100km speed limits by more than 10km	19%	32%	65%	41%	100%

The inclination for low and high level speeding is apparent across speed limits;
 - 85% of those who consider it broadly acceptable to exceed 100km limit by more than 10km also consider it broadly acceptable to exceed 50km limit by 10km.
 - 74% of those who consider it acceptable to exceed 50km limit by less than 10km, also consider it acceptable to exceed 100km limit by less than 10km

Q. I am now going to read out some various types of driving behaviour and for each one, I would like you to tell me how acceptable or unacceptable you think it is for drivers to do these things. A score of one means you think the behaviour is totally acceptable and a score of ten means you think it is totally unacceptable.

What Level of Speeding is Acceptable?

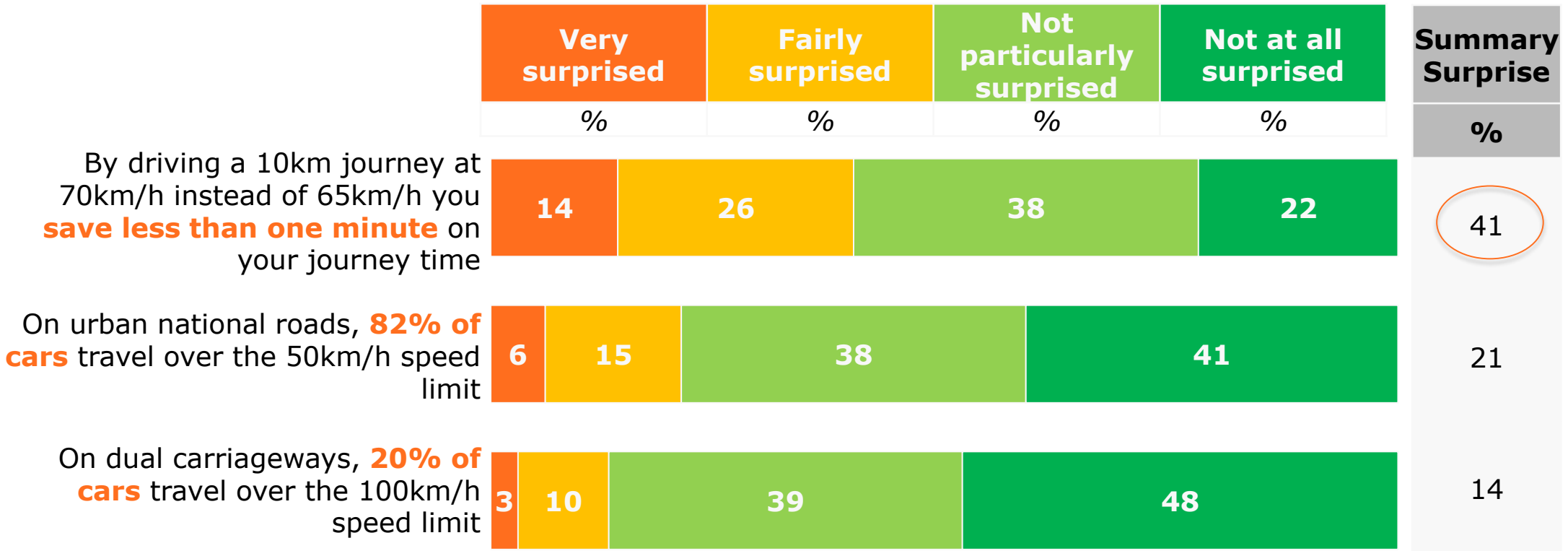
Base: All Motorists N-1,061

Mean Scores (1 Acceptable — 10 Unacceptable)	Total	Speeding & Rule Violation		
		SRV Low	SRV Medium	SRV High
Exceed 50km speed limits by less than 10km	6.3	7.7	5.6	4.4
Exceed 50km speed limits by more than 10km	7.9	8.9	7.8	6.2
Exceed 100km speed limits by less than 10km	6.8	8.4	6.2	4.7
Exceed 100km speed limits by more than 10km	8.3	9.3	8.2	6.6

A key difference between High and Medium S&R Violators is that High S&R Violators are more accepting of high level as well as low level speeding.

Facts About Speeding: Awareness

Base: All Motorists N-1,061



The weak relationship between speed and time savings on short journeys is of most surprise to motorists.

Collisions & Near Accidents (Past 5 Years)

Base: All Motorists N-1,061

Collision

Yes
%

10

SRV Low	6%
SV Medium	13%
SRV High	12%

'Near Miss'

Yes
%

30

**28%
as a
driver**

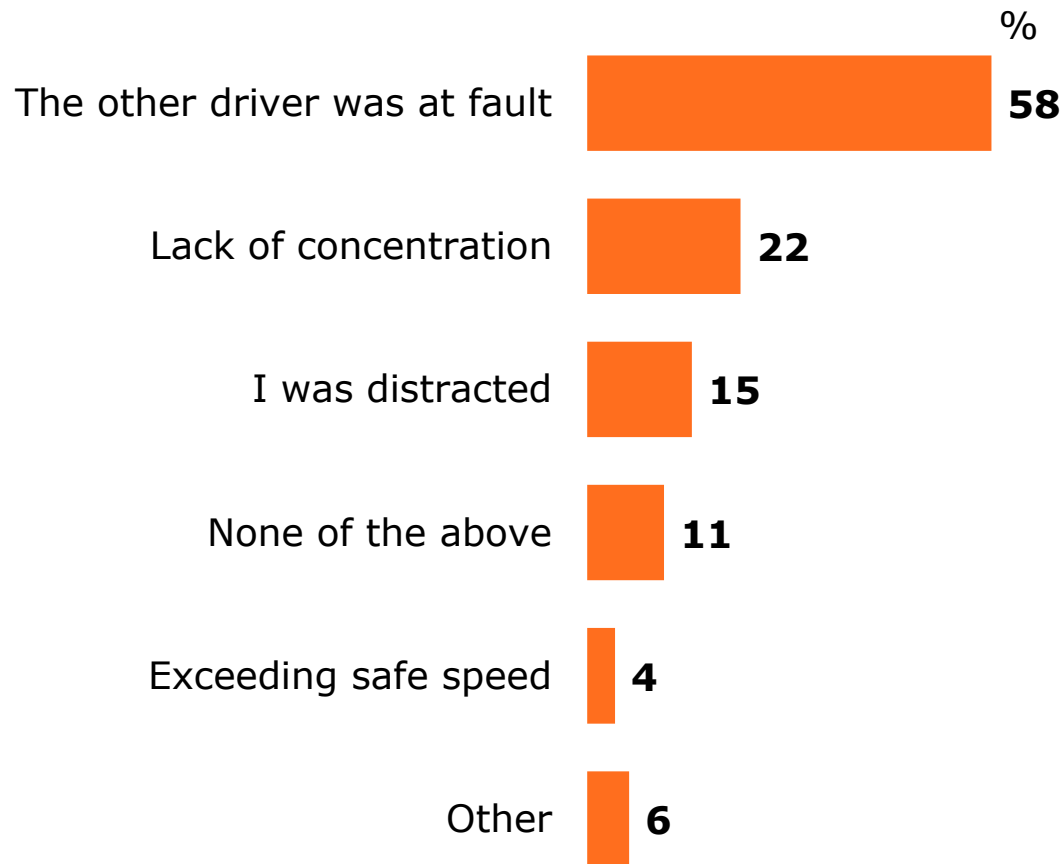
SRV Low	20%
SV Medium	35%
SRV High	44%

1% involved in more than 1 collision.

- Q. In the last five years have you been involved in a collision while driving a motor vehicle in which there was damage to your vehicle or another vehicle?
- Q. In the last five years have you ever been involved in a 'near miss' i.e. you narrowly escaped a collision with another road user while in a car, on bicycle, or as a motorcyclist or pedestrian?
- Q. In the last five years how many collisions, if any have you been involved in, as the driver of a vehicle, in which someone, including yourself, was injured and received medical attention?
- Q. In the last three years have you had one or more injuries serious enough to interfere with your daily activities as a result of a traffic collision?

Reason for Collision

Base: Involved in a collision past 5 years N - 111



All others 1% or less

Age	
-34 years	35+ years
41	70
%	%
51	53
33	16
21	11
7	13
4	4
7	6

Lack of concentration/distraction much higher among under 34 years. Mobile phone use in car also much higher among under 34s.

Q. Were any of these collisions the result of you doing any of these things?

Garda Announcements of Planned Traffic Checks

Base: All Motorists N – 1,061

Awareness of Garda Announcements

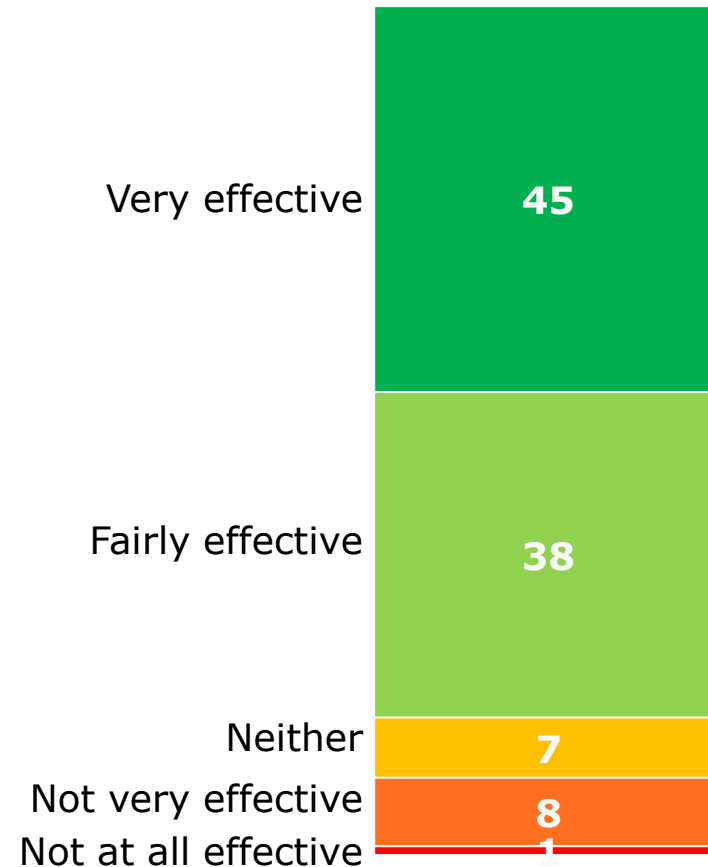
%

78



Perceived Effectiveness of Garda Announcements (Base: All Aware N – 841)

%



78% of motorists are aware of Garda announcements (re: traffic checks) prior to Bank Holidays and 83% of those aware consider them effective.

- Q. Coming up to bank holidays and other times of the year, the Gardai can announce that there will be an increase in planned traffic checks. Prior to this interview, were you aware that the Gardai made such announcements?
- Q. In your view, how effective are these announcements in influencing people to drive safer over bank holidays?

Garda Announcements of Planned Traffic Checks

Base: All Motorists N – 1,061

	Total	Speeding & Rule Violation		
		SRV Low	SRV Medium	SRV High
<i>Base:</i>	1,061	460	396	205
	%	%	%	%
Aware	78	74	82	81
Summary Effective	83	87	80	83

Awareness and perceived effectiveness of the Garda Bank Holiday announcements are consistently high across the SRV groups.

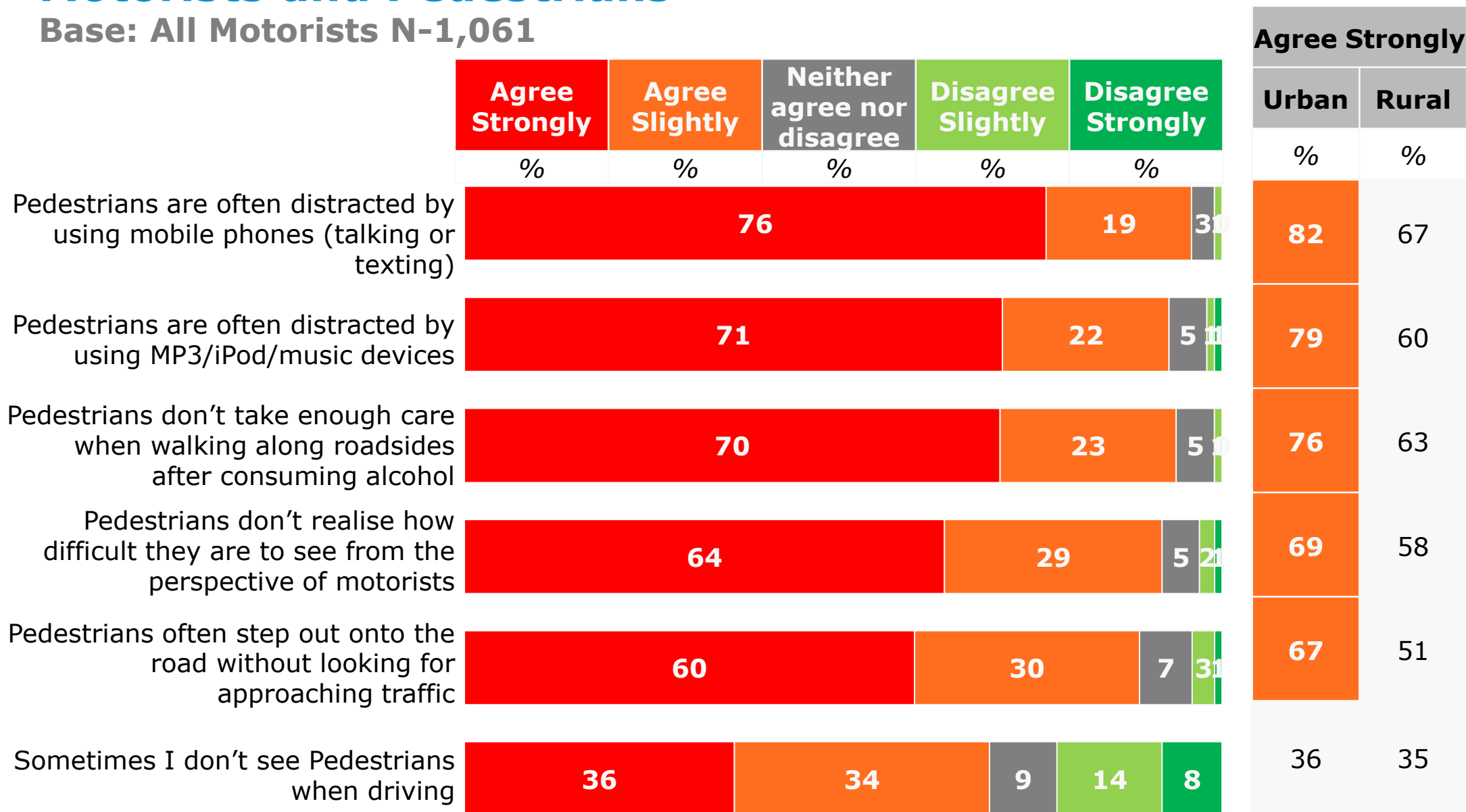
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Motorists & Pedestrians



Motorists and Pedestrians

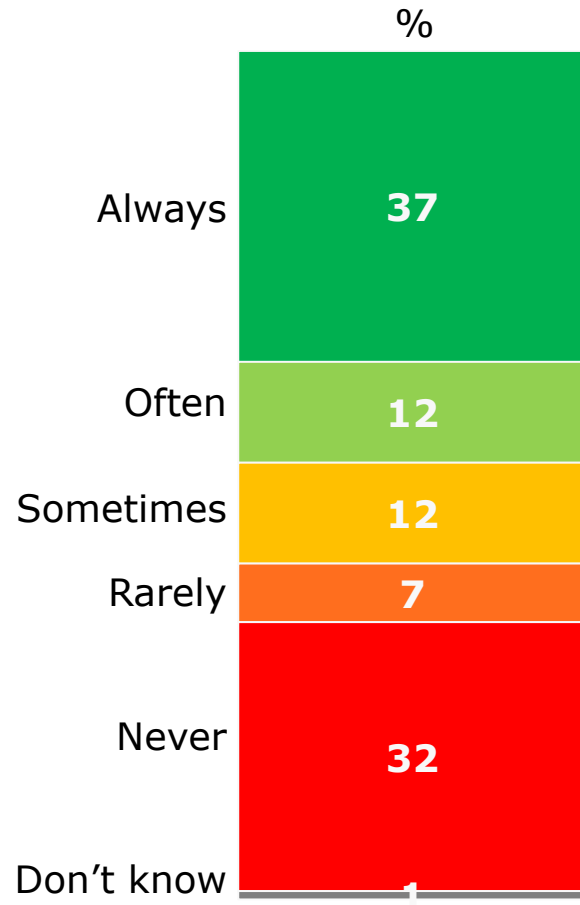
Base: All Motorists N-1,061



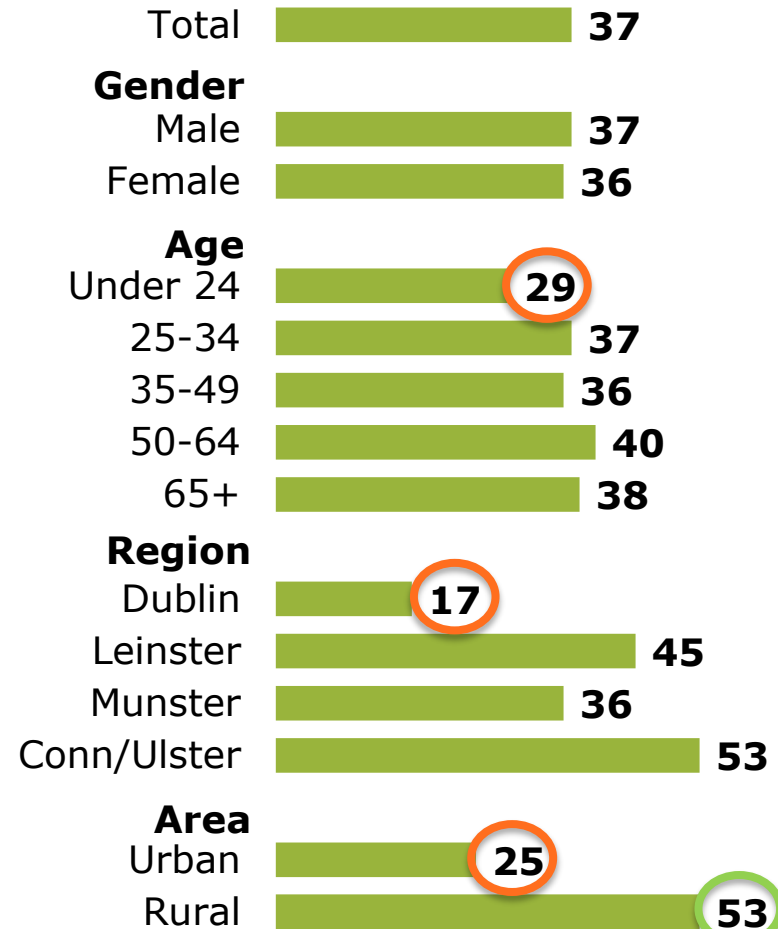
Motorists' views on the behaviour of pedestrians is consistently negative, with criticism peaking among urban drivers.

Pedestrians & Reflective Gear

Base: All Motorists N – 1,061



'Always'

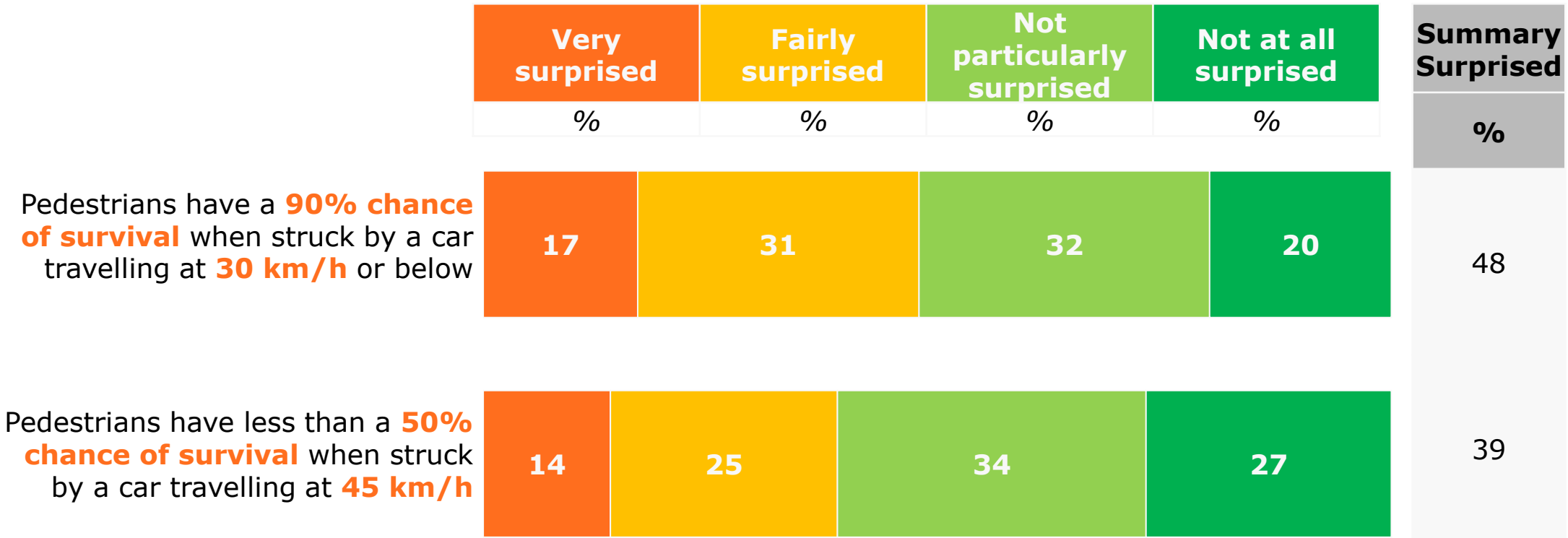


Young urbanites are much less likely to wear reflective gear as pedestrians – with the issue especially apparent in Dublin.

Q. How often do you wear reflective gear such as a high visibility jacket or vest or belt when walking or exercising for leisure at this time of year?

Facts About Pedestrians: Awareness

Base: All Motorists N – 1,061



Close to half of all motorists are surprised by the chance of survival when pedestrians are struck at 30 km p/h.

Facts About Pedestrians: Awareness

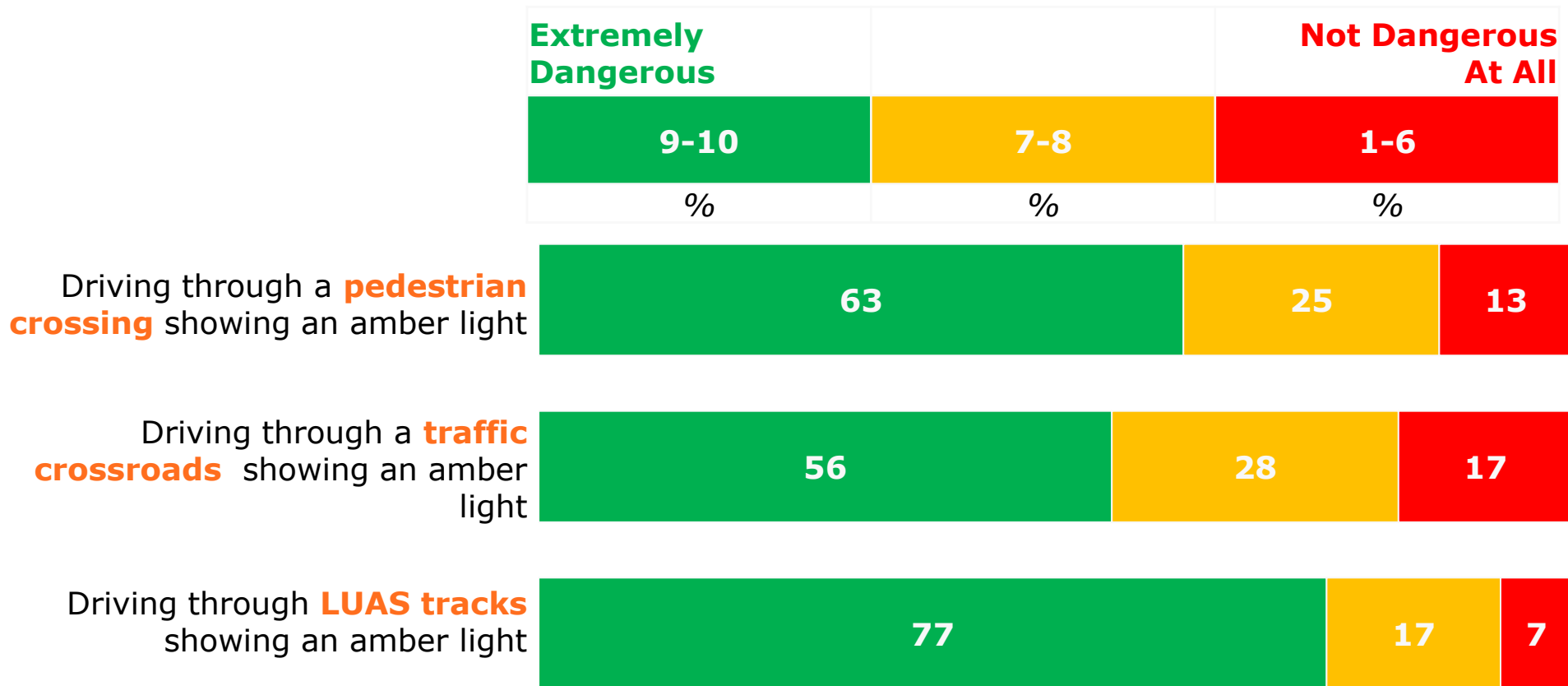
Base: All Motorists N – 1,061

'Very Surprised'	Total	Age					Area		Speeding & Rule Violation		
		-24	25-34	35-49	50-64	65+	Urban	Rural	SRV Low	SRV Medium	SRV High
<i>Base:</i>	1061	90	231	345	253	142	681	380	460	396	205
	%	%	%	%	%	%	%	%	%	%	%
Pedestrians have a 90% chance of survival when struck by a car travelling at 30 km/h or below	17	25	21	13	14	22	12	24	19	15	18
Pedestrians have less than a 50% chance of survival when struck by a car travelling at 45 km/h	14	17	18	12	9	16	9	20	15	11	18

Level of surprise is strongest among younger age groups; and in rural areas, which may suggest the potential value of this message being communicated in relation to low level speeding.

Amber Lights

Base: Motorists Drive in Dublin at Least 'Sometimes' N - 406

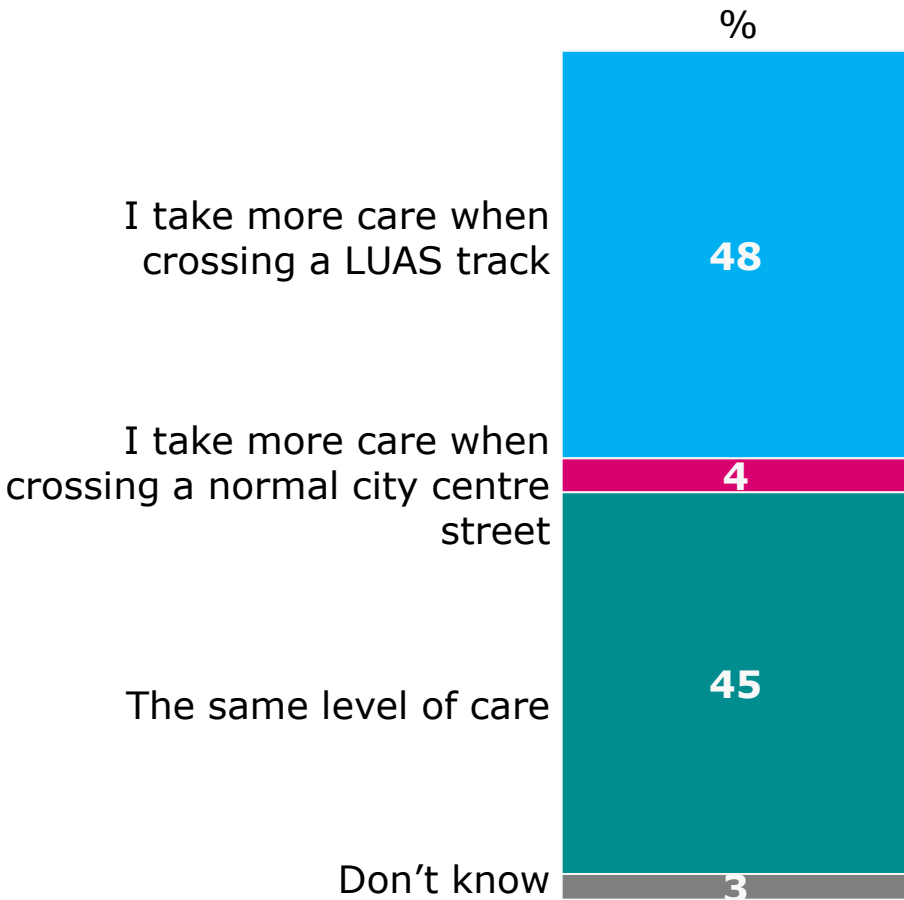


Likelihood of driving through amber lights at Luas tracks is relatively low in comparison to traffic crossroads – but still 7% of motorists question the danger involved.

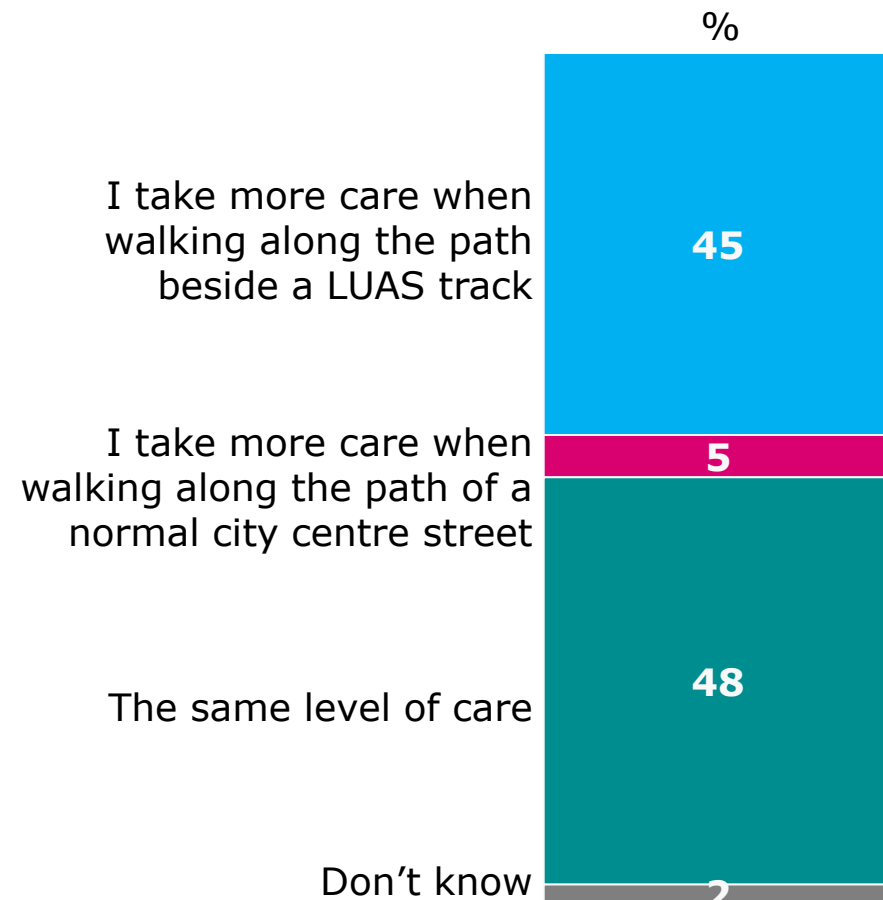
Pedestrians & Luas Tracks

Base: Motorists Drive in Dublin at Least 'Sometimes' N - 406

Crossing a Luas Track



Walking Beside a Luas Track



- Q. When walking in Dublin, how would you rate the level of care you take when crossing a LUAS track in comparison to crossing a normal city centre street?
- Q. When walking in Dublin, how would you rate the level of care you take when walking along the path beside a LUAS track in comparison to walking along the path of a normal city centre street?

Pedestrians & Luas Tracks

Base: Motorists Drive in Dublin at Least 'Sometimes' N - 406

	Crossing a Luas Track					Walking Beside a Luas Track				
	Total	Gender		Age		Total	Gender		Age	
		Male	Female	-34yrs	35+yrs		Male	Female	-34yrs	35+yrs
Base:	406	232	174	121	285	406	232	174	121	285
	%	%	%	%	%	%	%	%	%	%
I take more care when crossing a LUAS track	48	47	49	39	52	45	46	44	37	49
I take more care when crossing a normal city centre street	4	5	4	6	3	5	5	5	6	4
The same level of care	45	47	42	50	42	48	47	49	54	46
Don't know	3	1	5	4	3	2	2	2	3	2

Relative care around Luas tracks is a little less apparent among those 34 years or under.

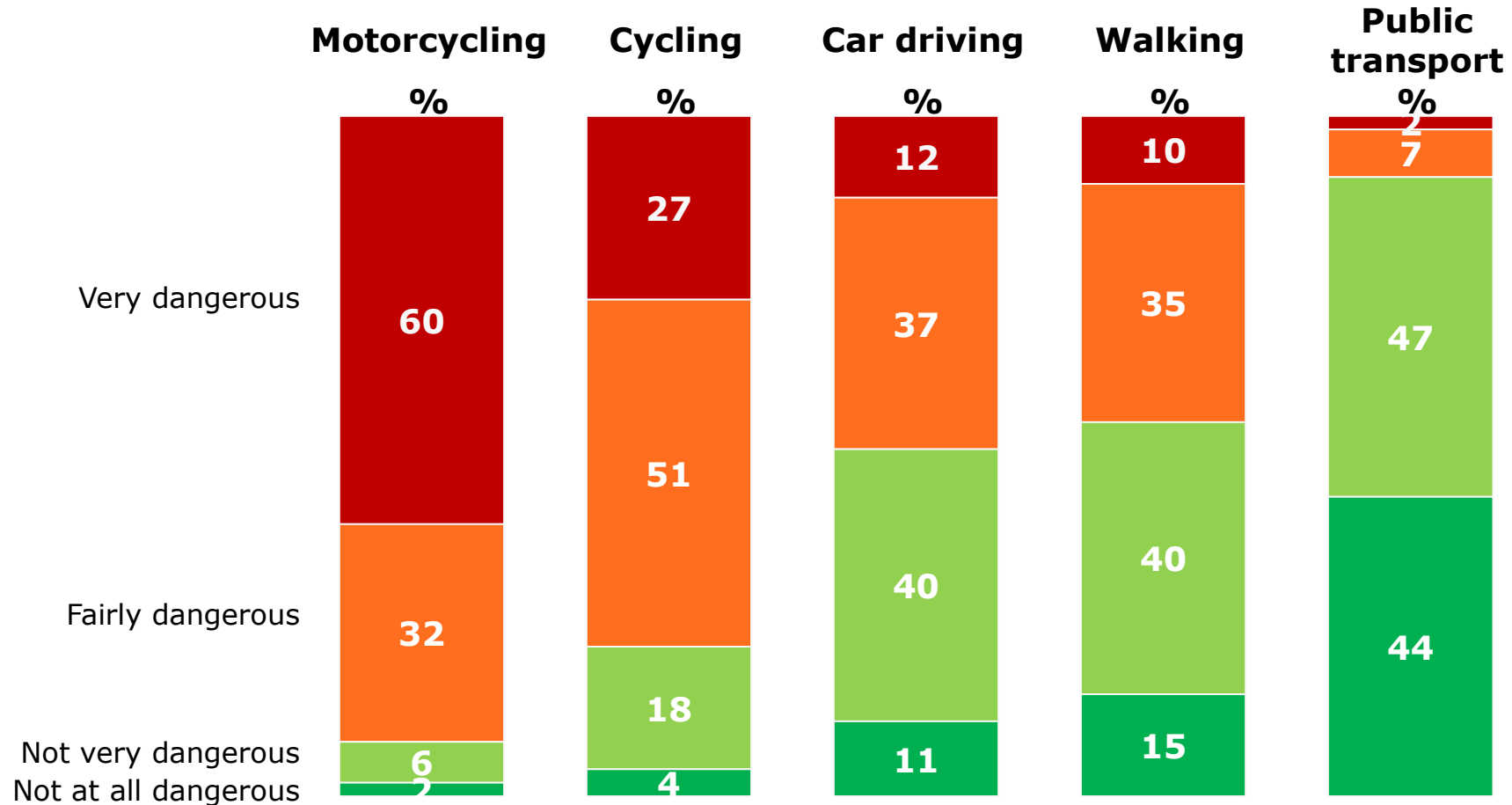
- Q. When walking in Dublin, how would you rate the level of care you take when crossing a LUAS track in comparison to crossing a normal city centre street?
- Q. When walking in Dublin, how would you rate the level of care you take when walking along the path beside a LUAS track in comparison to walking along the path of a normal city centre street?

Motorcycles / Bicycles



Perceived Dangerous Modes of Transport (June 2014)

Base: All adults N – 1,000



Any Dangerous Jun '14	92	78	49	45	9
Any Dangerous Feb '14	92	83	56	55	15
Any Dangerous May '13	89	79	54	53	12

Motorcycling is consistently perceived to be the most dangerous mode of transport; 9 out of 10 adults consider it to be very or fairly dangerous.

Dangerous Modes of Transport: Cycling (June 2014)

Base: All adults N – 1,000

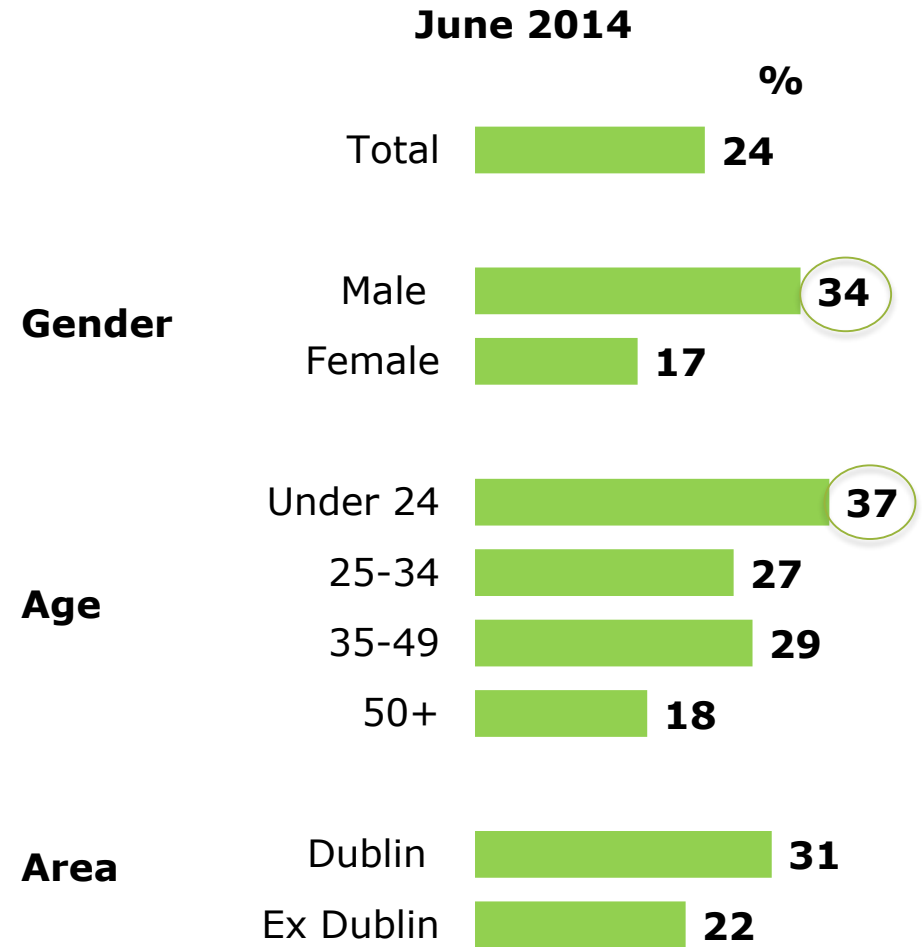
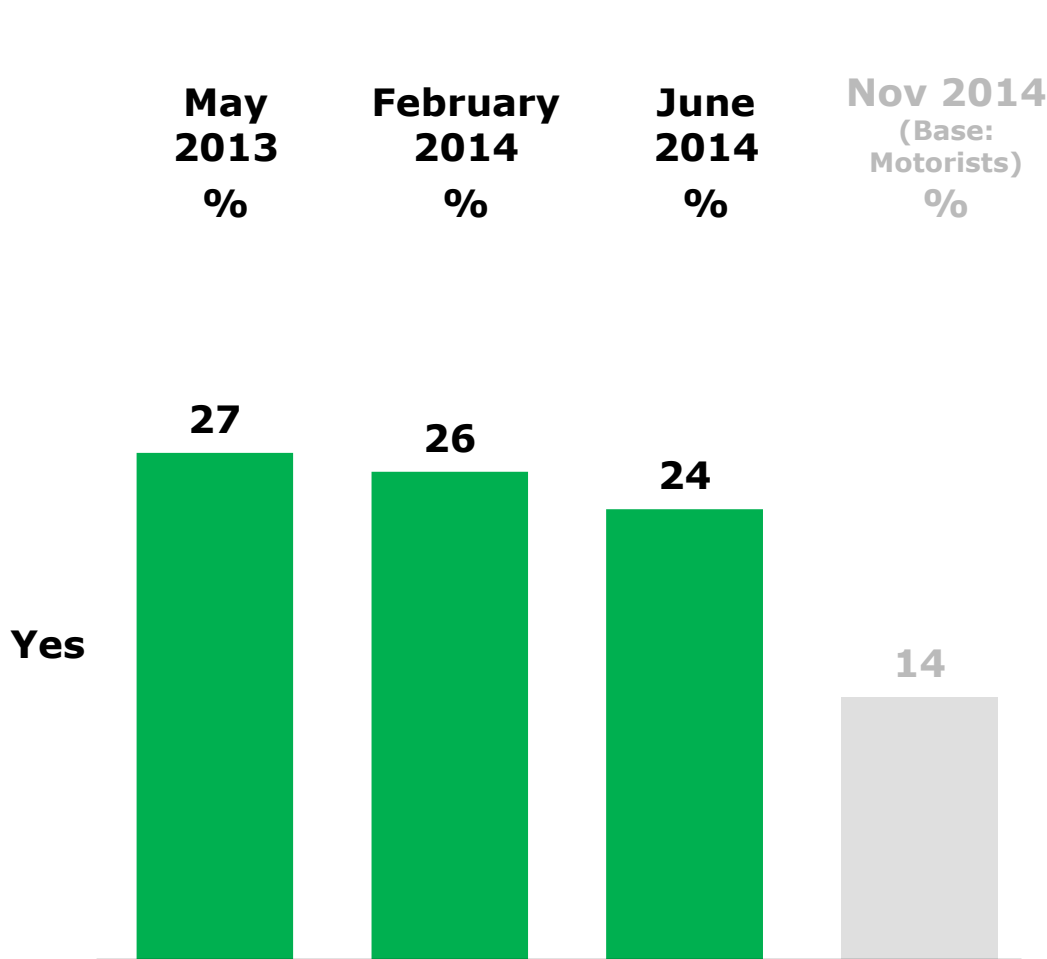
Cycling	Total All Adults	Motorists	Cyclists
<i>Base:</i>	<i>1,000</i>	<i>717</i>	<i>255</i>
	%	%	%
Very dangerous	27	27	18
Fairly dangerous	51	53	56
Not very dangerous	18	17	21
Not at all dangerous	4	2	5
Any Dangerous	78	80	74

Motorists and cyclists are in broad agreement of the potential dangers of cycling. This common perspective entirely endorses the RSA strategy of jointly targeting motorists and cyclists in the same TVC.



Do you cycle at all nowadays?

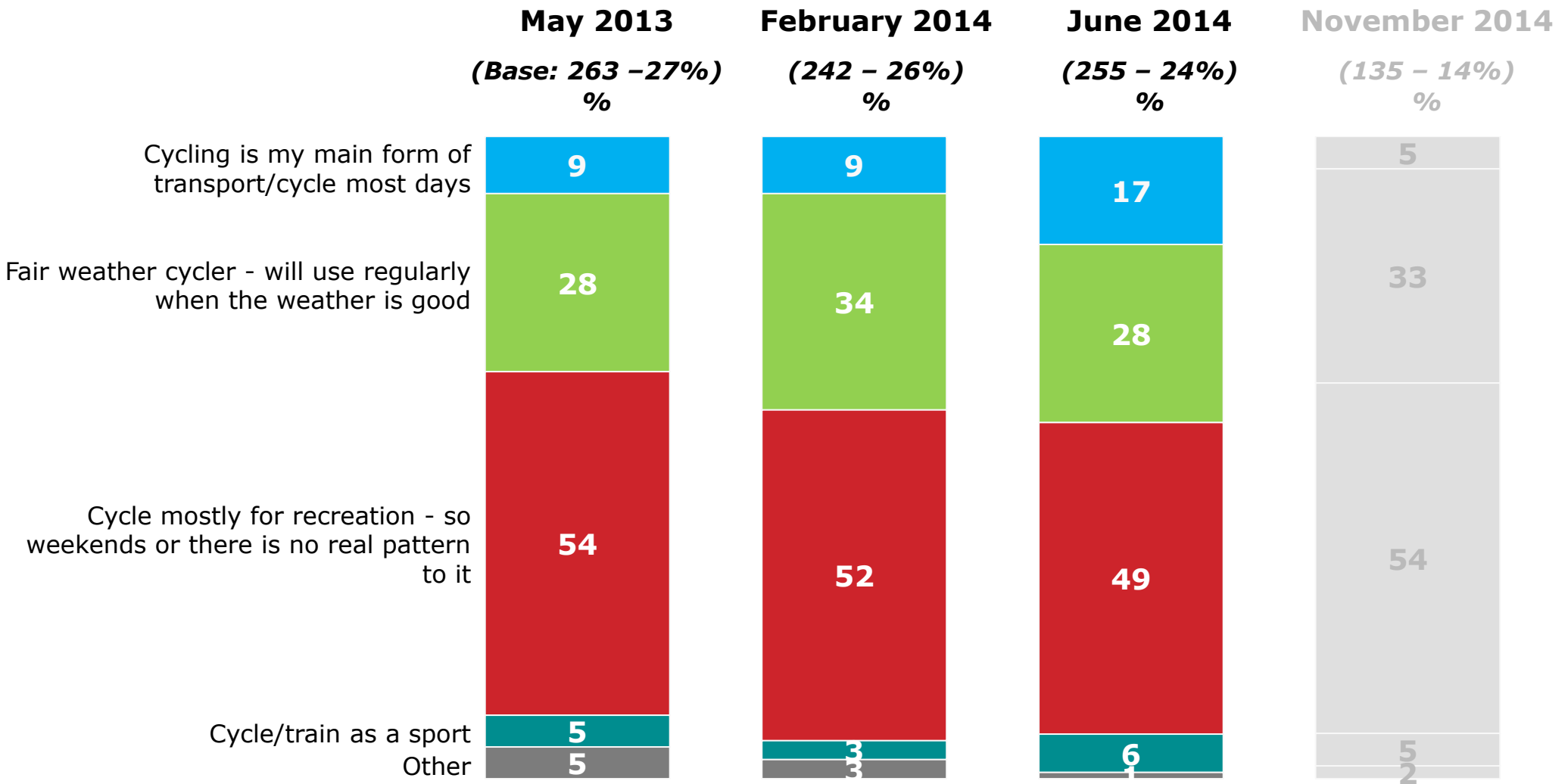
Base: All Adults N – 1,000



Approximately 1 in 4 of adults can be described as cyclists – rising to 1 in 3 males; and 1 in 3 in Dublin.

Type of Cyclist (June 2014)

Base: All cyclists (24 – 27% of all adults)



While the national incidence of cyclists remains consistent, those who consider cycling as their 'main form of transport' rose sharply in June 2014 (17%).

Type of Cyclist (June 2014)

Base: All Cyclists n- 255

Usage relatively more driven by necessity

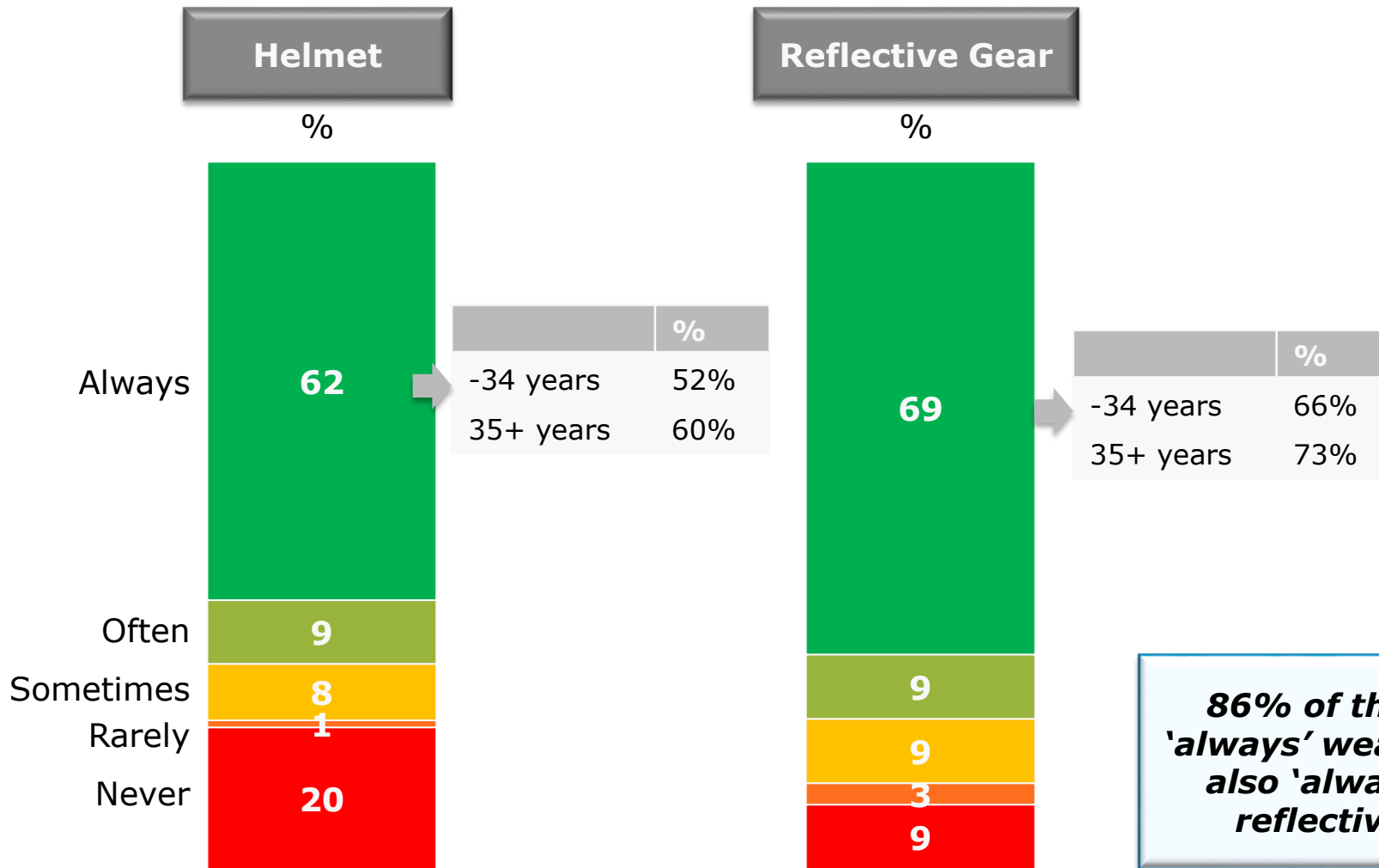
More of a lifestyle choice

	Total	Gender		Age					Region			
		Male	Female	Under 24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/Ulster
<i>Base:</i>	255	172	83	66	52	75	45	17	88	61	61	45
	%	%	%	%	%	%	%	%	%	%	%	%
Cycling is my main form of transport/cycle most days	17	21	9	25	18	14	15	11	25	16	16	2
Fair weather cyclist - will use regularly when the weather is good	28	23	37	28	26	24	33	37	29	34	23	22
Cycle mostly for recreation - so weekends or there is no real pattern to it	49	51	45	42	51	52	45	52	43	39	58	60
Cycle/train as a sport	6	5	7	6	5	9	2	-	1	9	2	17
Other	1	1	2	-	-	1	5	-	2	2	-	-

Rise in cycling as 'main form of transport' is a function of increase among males; under 34 years; and in Dublin - driven in part by 'Dublin Bikes'?

Cycling Safety Gear (December 2014)

Base: All Cyclists N - 135

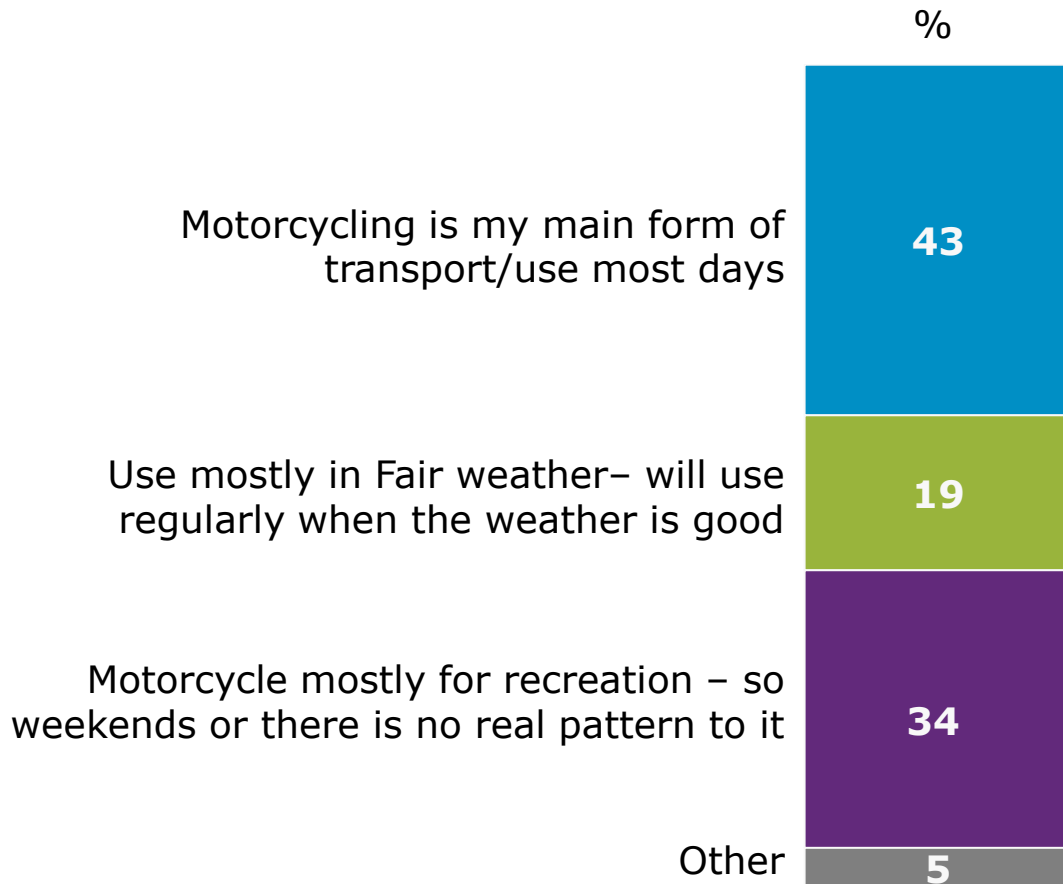


Safety gear compliance is generally stronger among older cyclists. 1 in 5 cyclists never wear a helmet. Key factors behind not wearing helmet: inconvenience of carrying when out and about 53%; unattractive/ruins hair 13%.

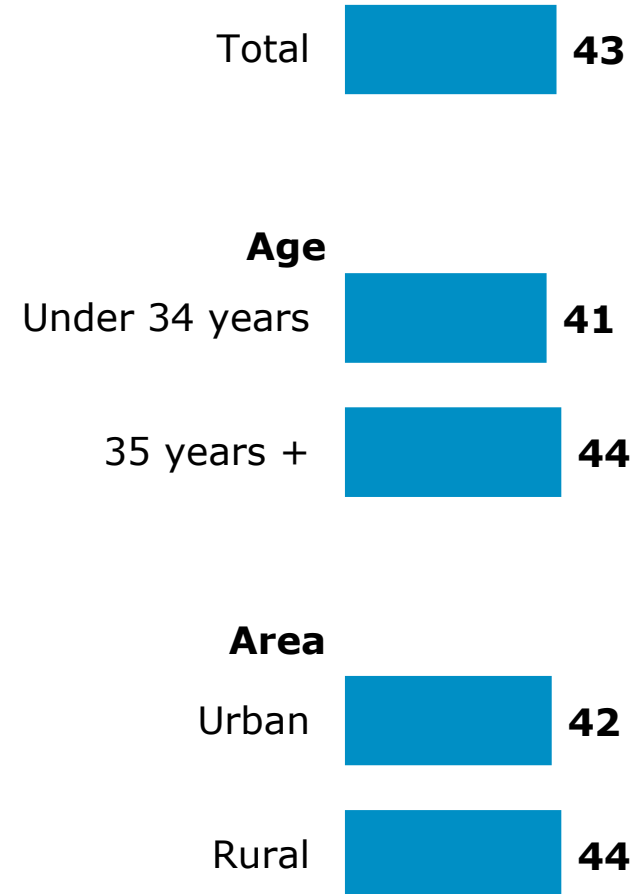
- Q. How often do you wear a helmet when you ride a bicycle?
- Q. How often do you wear reflective gear such as a high visibility jacket or vest or belt when you ride a bicycle?
- Q. Which of the following factors influences your decision not to wear a helmet all of the time?

Type of Motorcyclist

Base: All Motorcyclists N – 75 (2%)



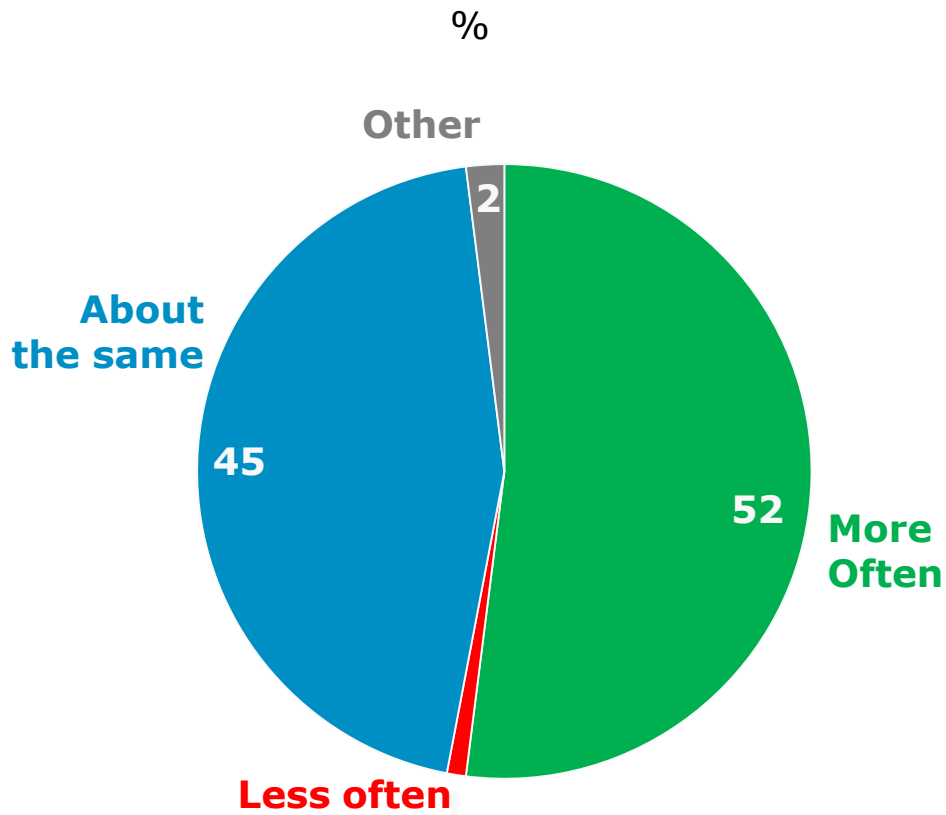
Motorcycling as 'Main Form of Transport'



Less than 1 in 2 motorcyclists consider it their main form of transport; a pattern consistent across age and area.

Motorcycle Use During Warmer Months (May-September)

Base: All Motorcyclists N – 75 (2%)



Use Motorcycle 'More often in Warmer Months'

Total **52%**

Motorcycle is...

Main Form of Transport **23%**

Other **73%**

Age

Under 34 **60%**

35 years + **45%**

Area

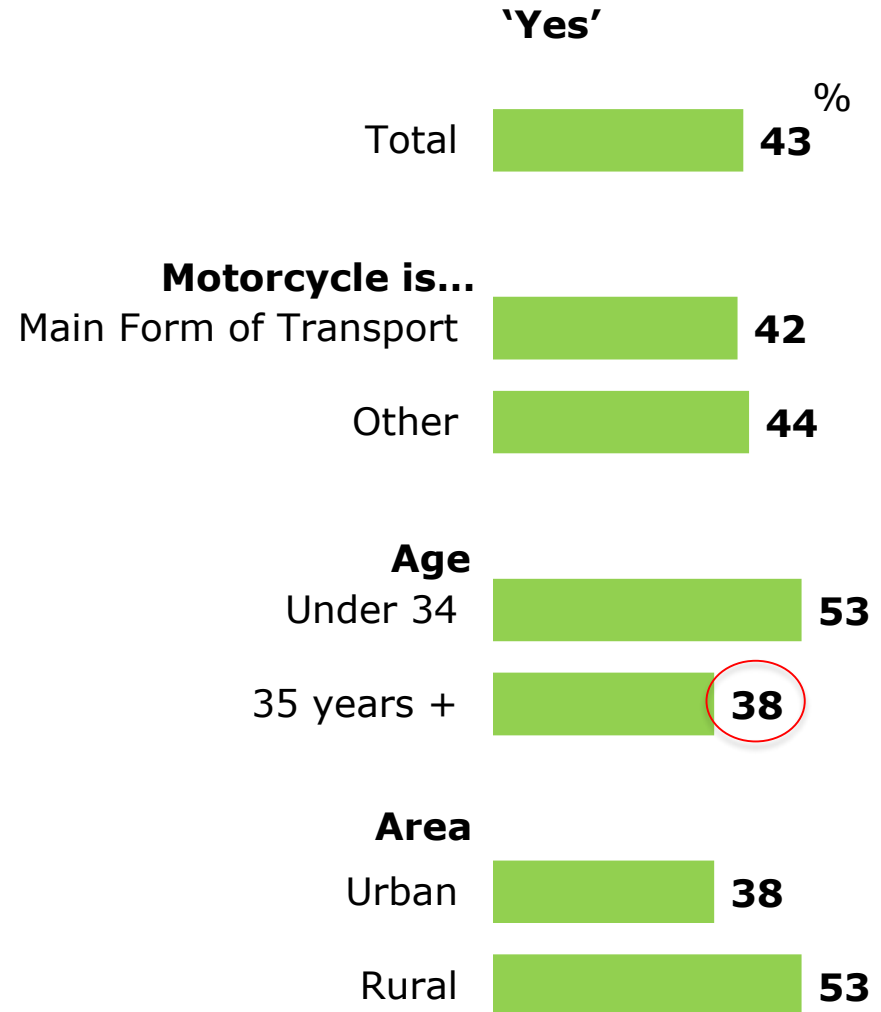
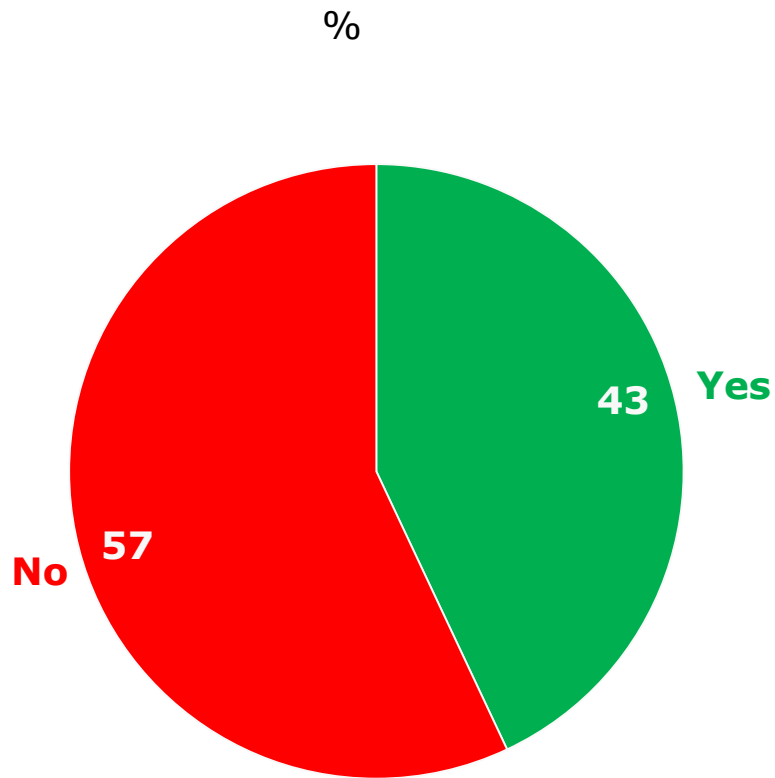
Urban **48%**

Rural **58%**

'Part time' motorcyclists are much more likely (73%) to be on the road in the warmer months.

Received Additional Training for New Motorcycle

Base: All Motorcyclists N – 75 (2%)



About 40% of motorcyclists undergo some form of additional training/instruction after purchasing a motorcycle; appears slightly lower among older (repeat?) purchasers.

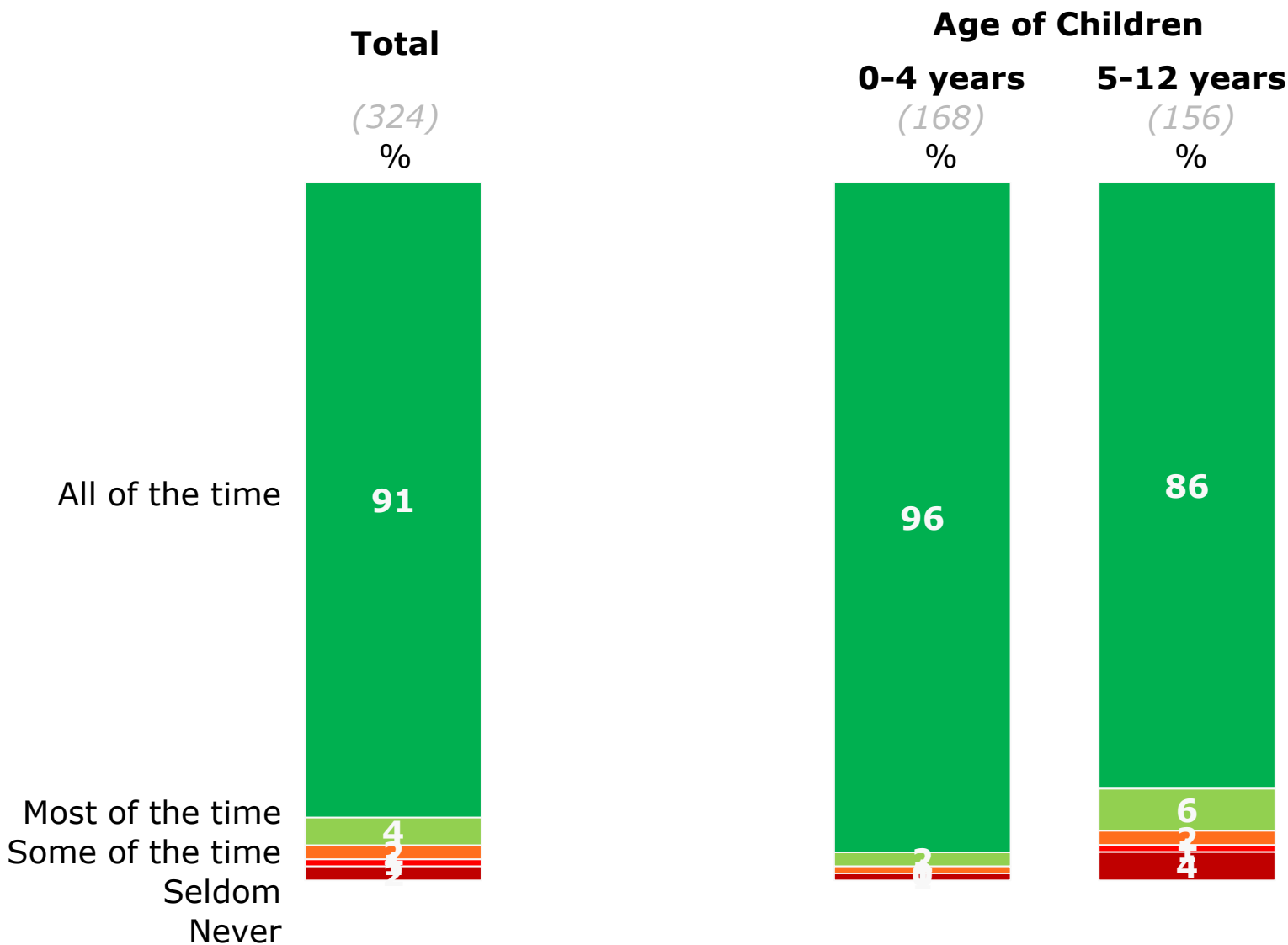
Q. Have you ever undergone any additional training/ instruction after purchasing a motorcycle?

Child Safety



Use of Child Restraints in Car

Base: Motorists with Children Under 12 Years N - 324



Key Reasons for Non-Use
(Base: 28*)

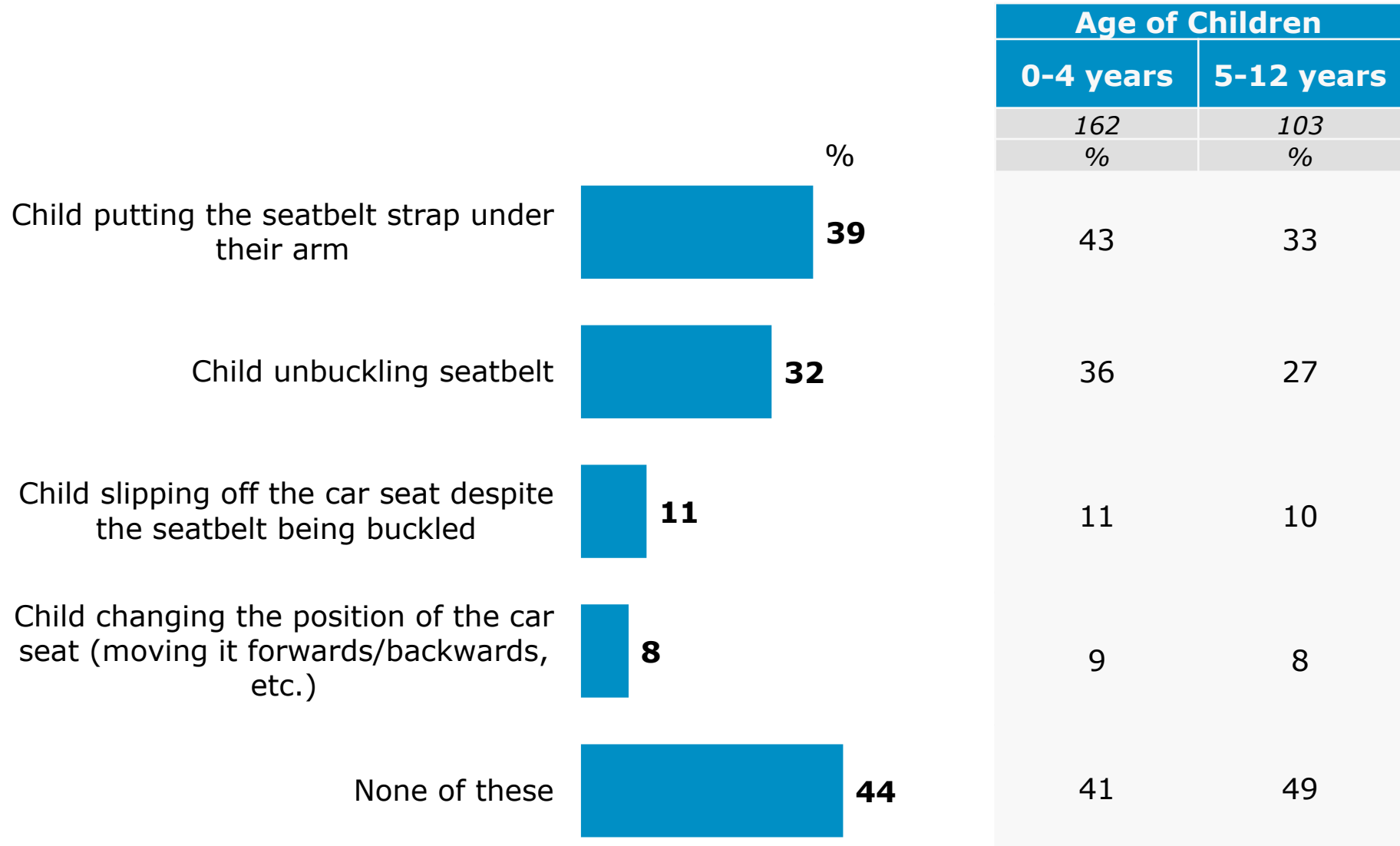
Reason	Mentions
Being in a hurry	(8)
Difficult to use child seat	(7)
Child is too big/small	(6)
Don't own a child seat	(6)

*Small Base

Approximately 1 in 10 parents (motorists) do not always use appropriate restraints for children in their car, with non observance more likely in relation to children above 4 years.

Correcting Child's Behaviour in Car Seat

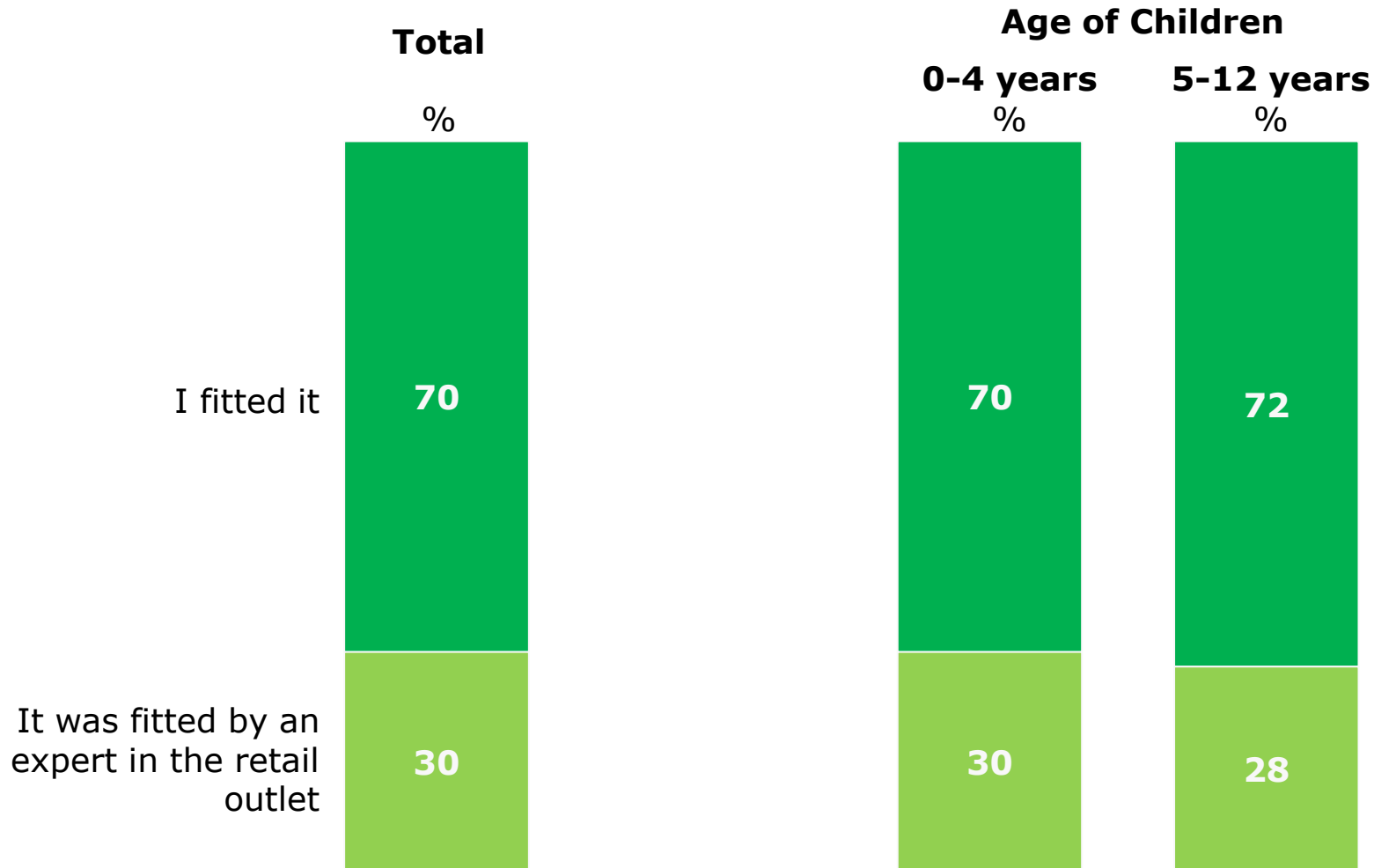
Base: Motorists with Children Under 12 Years; Have Child Car Seat N - 265



Two misbehaviours dominate in relation to child car seats.

Who Fitted the Child Car Seat

Base: Motorists with Children Under 12 Years; have Child Car Seat N-265

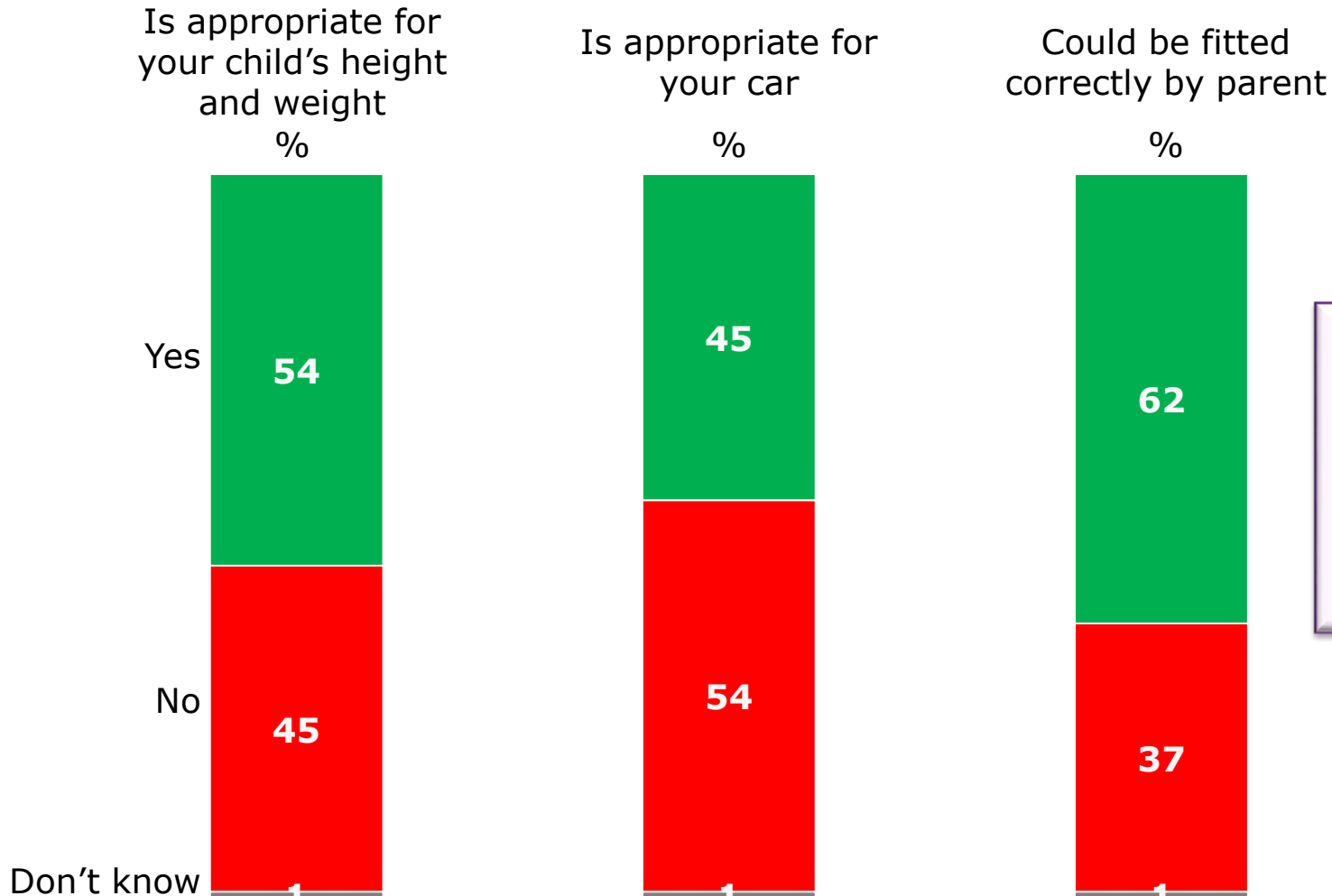


70% of parents fitted the car seat themselves.

Expert Checks on Child Car Seats/Boosters

Base: Motorists with Children Under 12 Years; Have Child Car Seat N - 265

An expert from retail outlet checked child car seat...



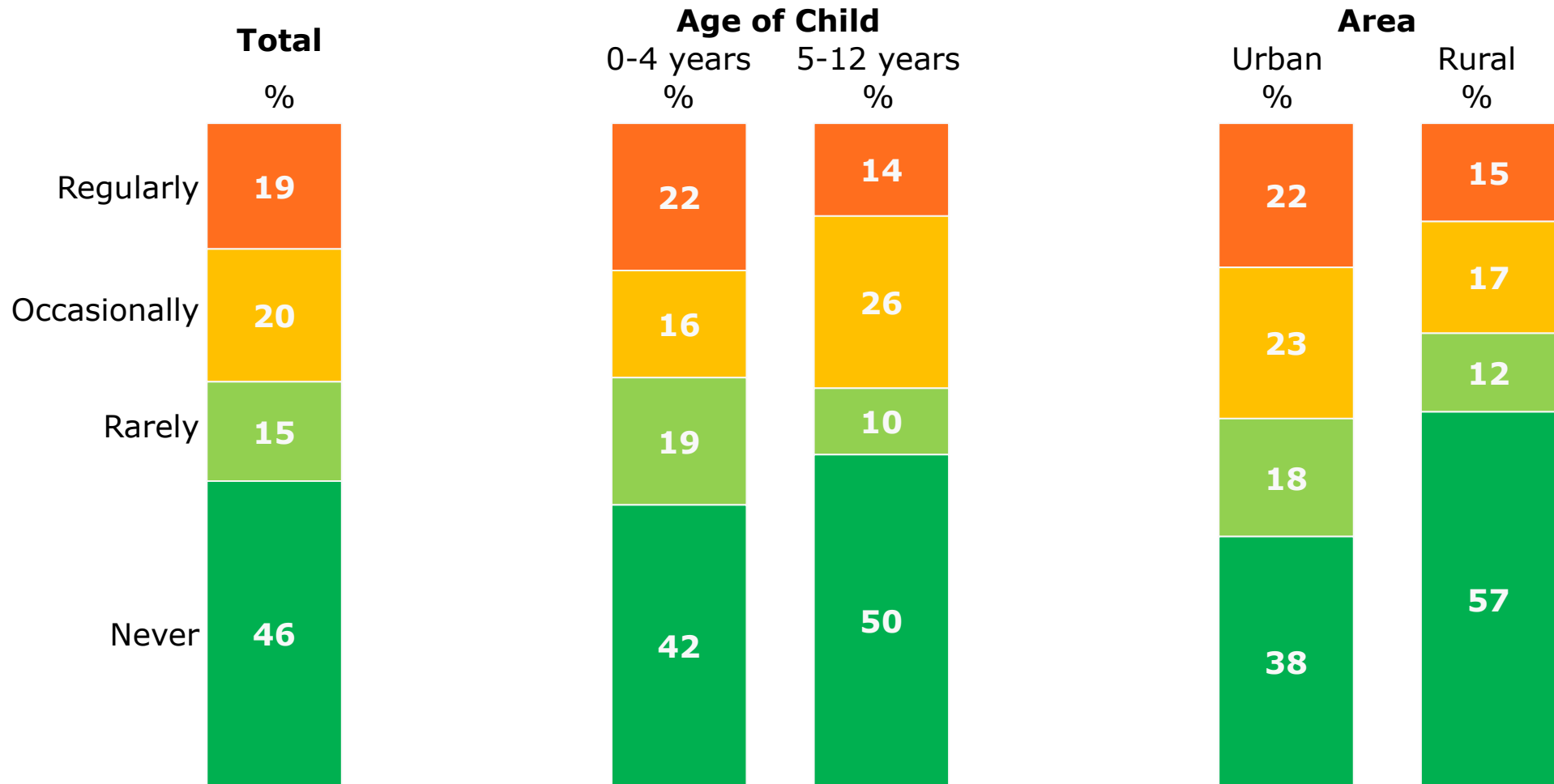
40% say 'Yes' to all questions (rises to 46% with younger children)

27% say 'No' to all questions

- Q. Has your child car seat/booster been checked for being appropriate for your child's height and weight by an expert from a retail outlet?
- Q. Has your child car seat/booster been checked for being appropriate for your car by an expert from a retail outlet?
- Q. Were you shown how to fit the child car seat/booster in your car correctly by an expert from a retail outlet?

How Often Car Seat Used in Another Car

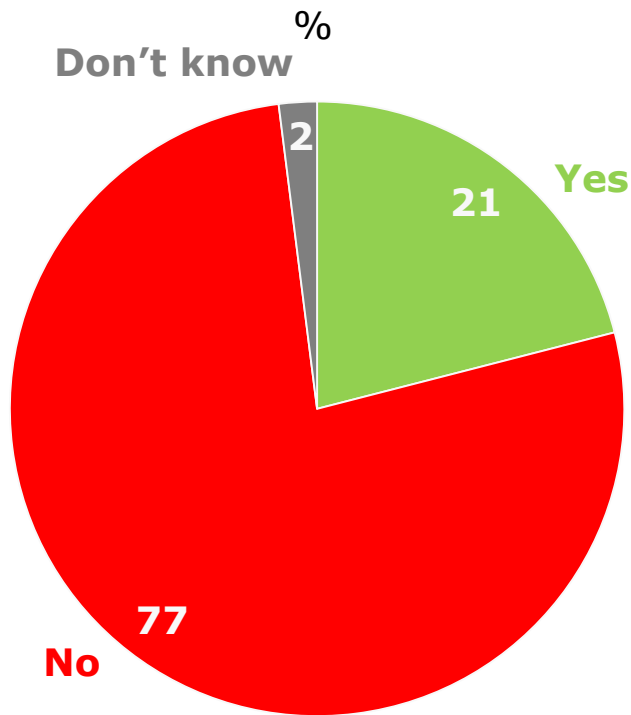
Base: Motorists with Children Under 12 Years; Have Child Car Seat N - 265



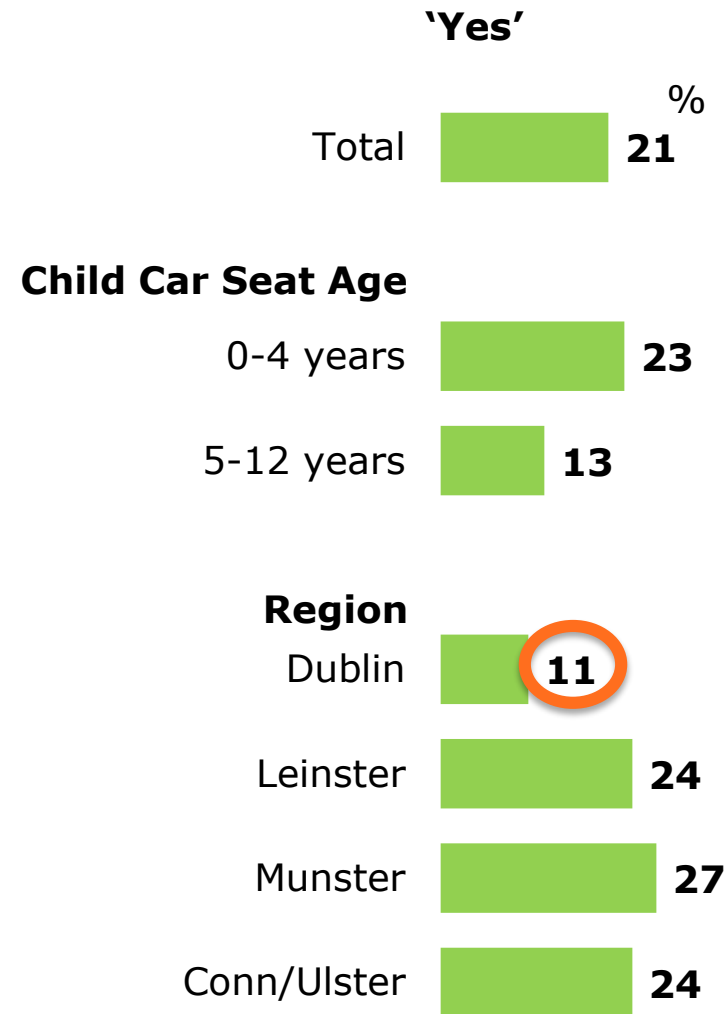
About 1 in 5 regularly use their car seat in another car – multiple car usage much stronger in urban areas.

Awareness of RSA 'Check Fits'

Base: Motorists with Children Under 12 Years; Have Child Car Seat N - 265



21% of parents (motorists) are aware of 'Check Fits'. 35% of those who have heard of 'Check Fits' have used it.



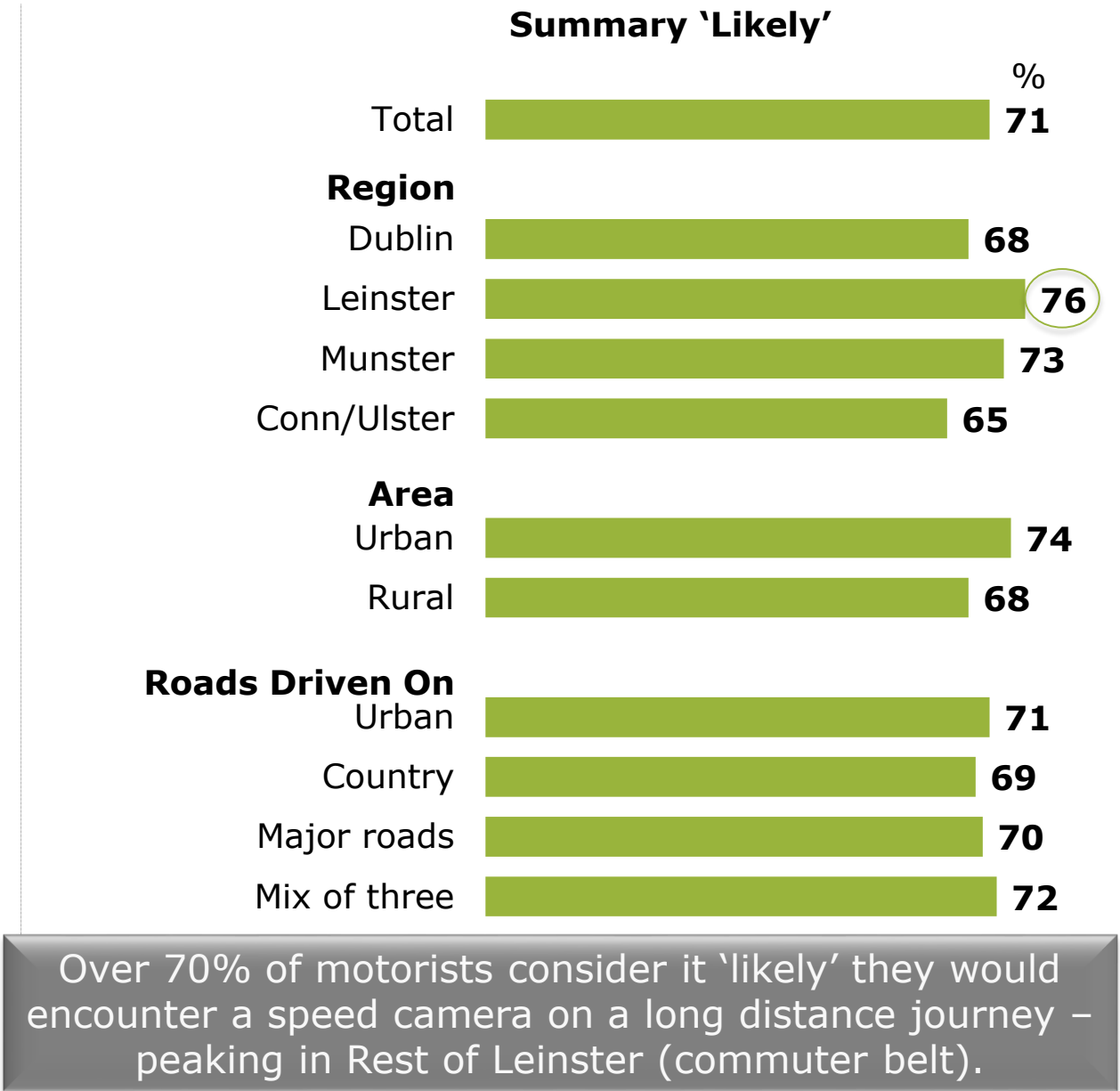
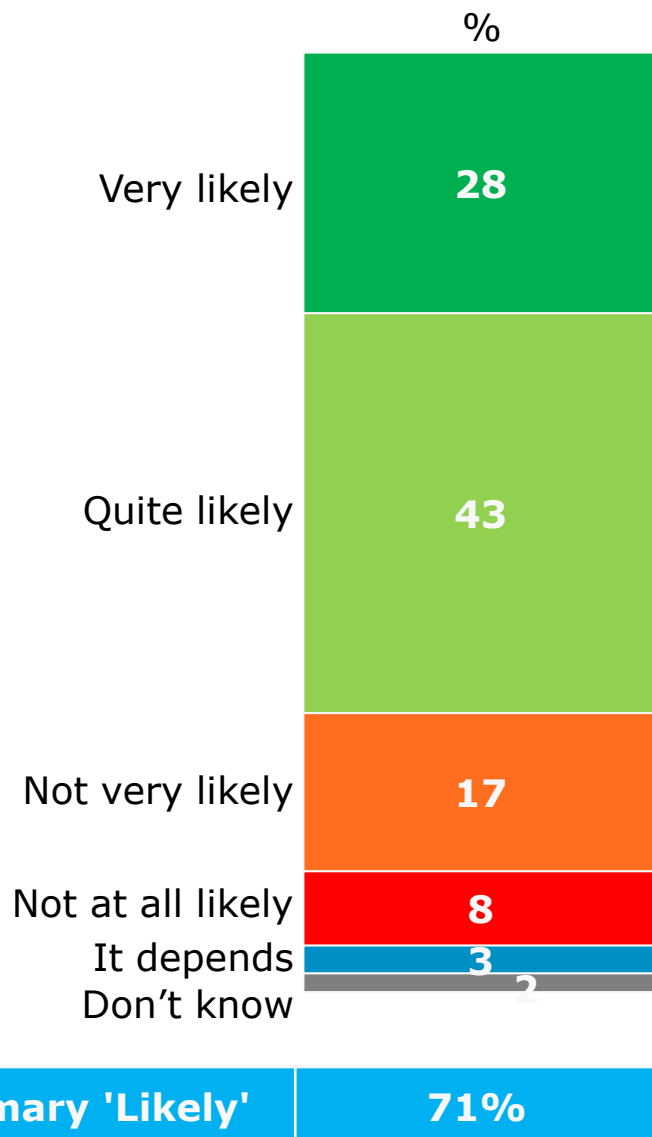
1 in 5 are aware of 'Check Fits', dropping to 11% in Dublin.

Safety Cameras



Encounter Safety Cameras

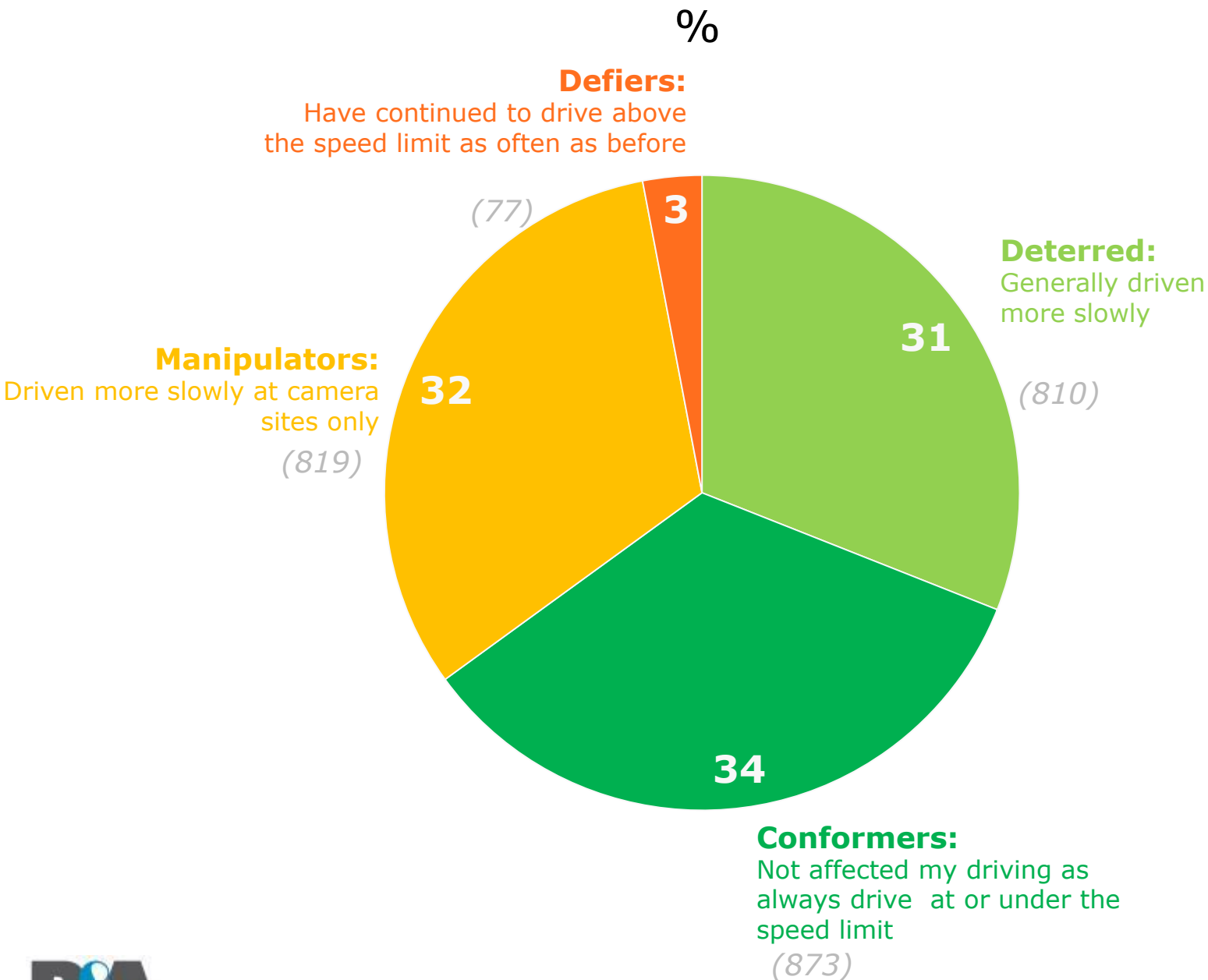
Base: All Motorists N – 1,061



Over 70% of motorists consider it 'likely' they would encounter a speed camera on a long distance journey – peaking in Rest of Leinster (commuter belt).

Behavioural Impact of Safety Cameras

Base: All Motorists N – 1,061



Deterred & Manipulators	
Primary reason for slowing down:	
Avoiding enforcement	71%
Safety	28%

(000's pop. est.)

Q. How, if at all, has the introduction of speed cameras in Ireland affected your driving speed?

Behavioural Impact of Safety Cameras

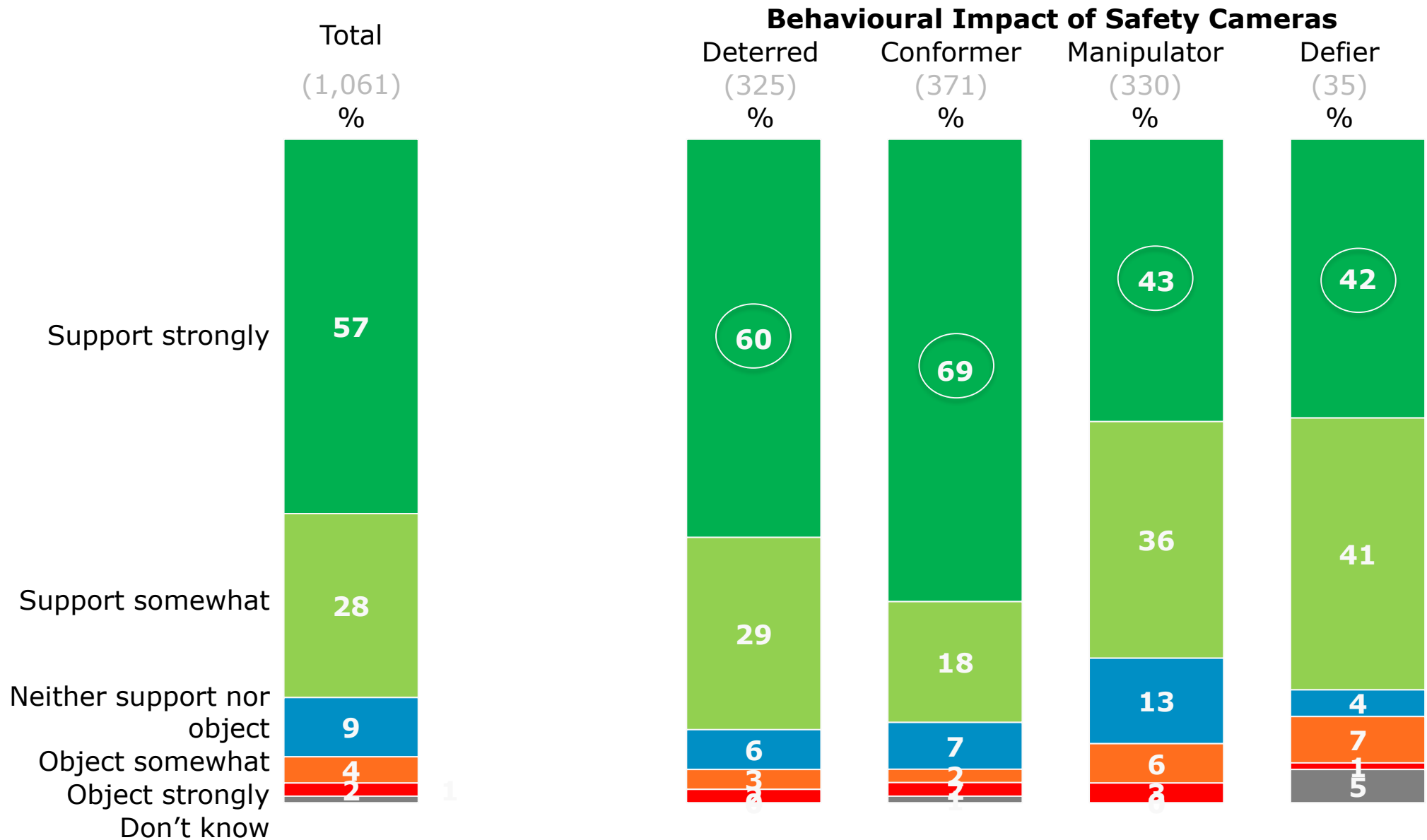
Base: All Motorists N – 1,061

	Total	Gender		Age					Roads Driven On				Drive for Work		Encounter Safety Cameras		
		Male	Female	-24	25-34	35-49	50-64	65+	Urban	Country	Major roads	Mix of three	Yes	No	Very likely	Quite likely	Rest
<i>Base:</i>	1061	567	494	90	231	345	253	142	337	190	41	491	151	496	306	459	296
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Deterred: Generally driven more slowly	31	32	31	30	31	33	34	27	34	28	41	31	31	33	40	31	23
Conformers: Not affected my driving as always drive at or under the speed limit	34	27	41	27	24	29	40	57	43	38	31	27	21	29	30	31	41
Manipulators: Driven more slowly at camera sites only	32	37	26	42	41	35	25	14	21	32	26	39	41	35	28	35	31
Defiers: Have continued to drive above the speed limit as often as before	3	4	2	1	5	4	1	2	3	2	2	3	6	2	2	3	4

'Manipulators' and 'Defiers' much more likely to be young males; and drive for work.

Support for Safety Cameras

Base: All Motorists N – 1,061

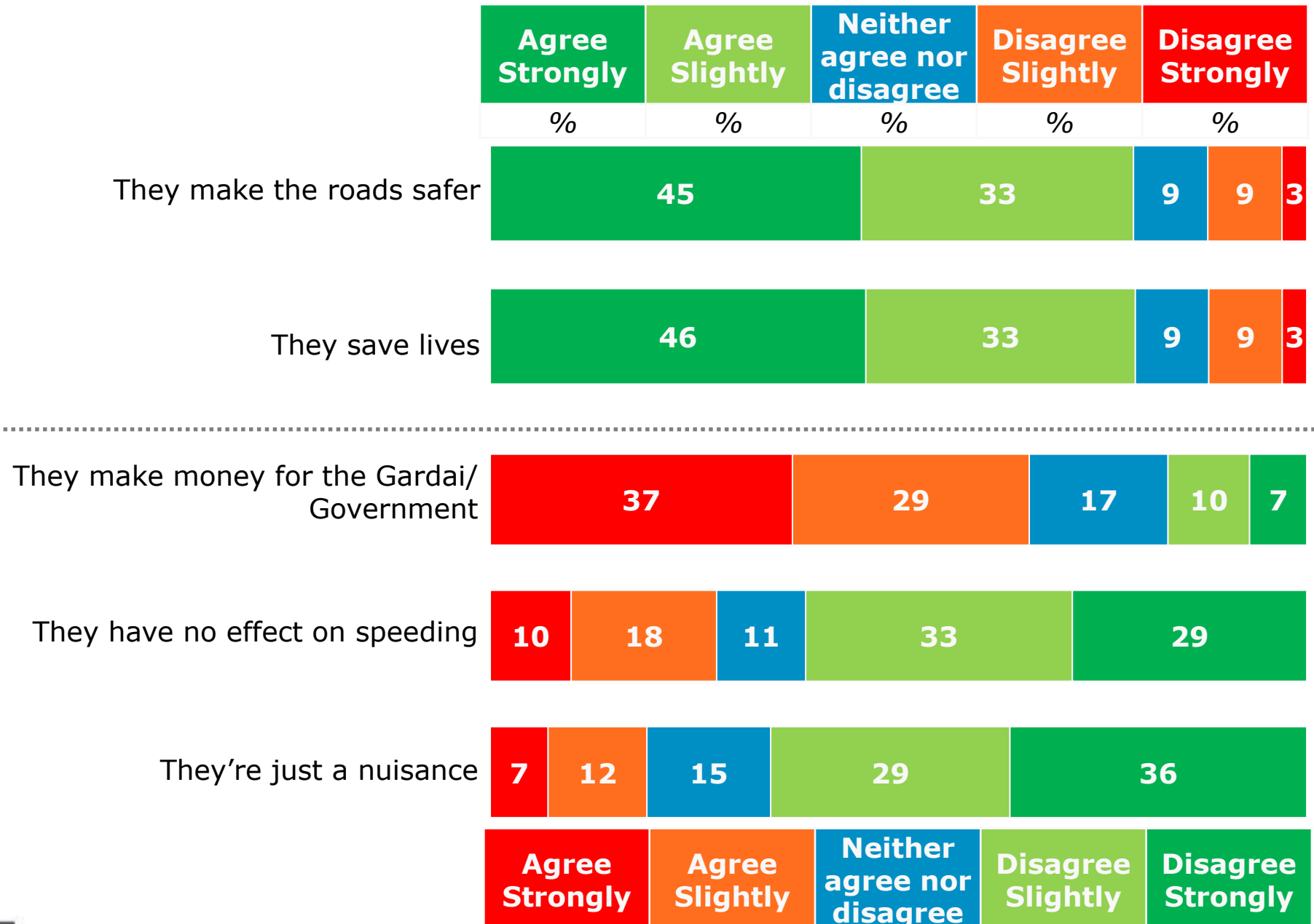


Strength of support for safety cameras is strongly related to compliance.

Q. To what extent do you support or object to the use of safety cameras on the roads?

Attitudes to Safety Cameras

Base: All Motorists N – 1,061



Q. I will now read out a series of statements about safety cameras. For each one please tell me the extent to which you agree or disagree with each statement?

Attitudes to Safety Cameras

Base: All Motorists N – 1,061

Agree Strongly	Total	Behavioural Impact of Safety Cameras			
		Deterred	Conformer	Manipulator	Defier
<i>Base:</i>	1,061	325	371	330	35
	%	%	%	%	%
They make the roads safer	45	55	47	37	28
They save lives	46	54	48	38	16
They make money for the Gardai/ Government	37	38	29	45	46
They have no effect on speeding	10	8	11	10	11
They're just a nuisance	7	7	5	9	8

The attitudes of 'Manipulators' and 'Defiers' are much more cynical and negative.

Attitudes to Safety Cameras

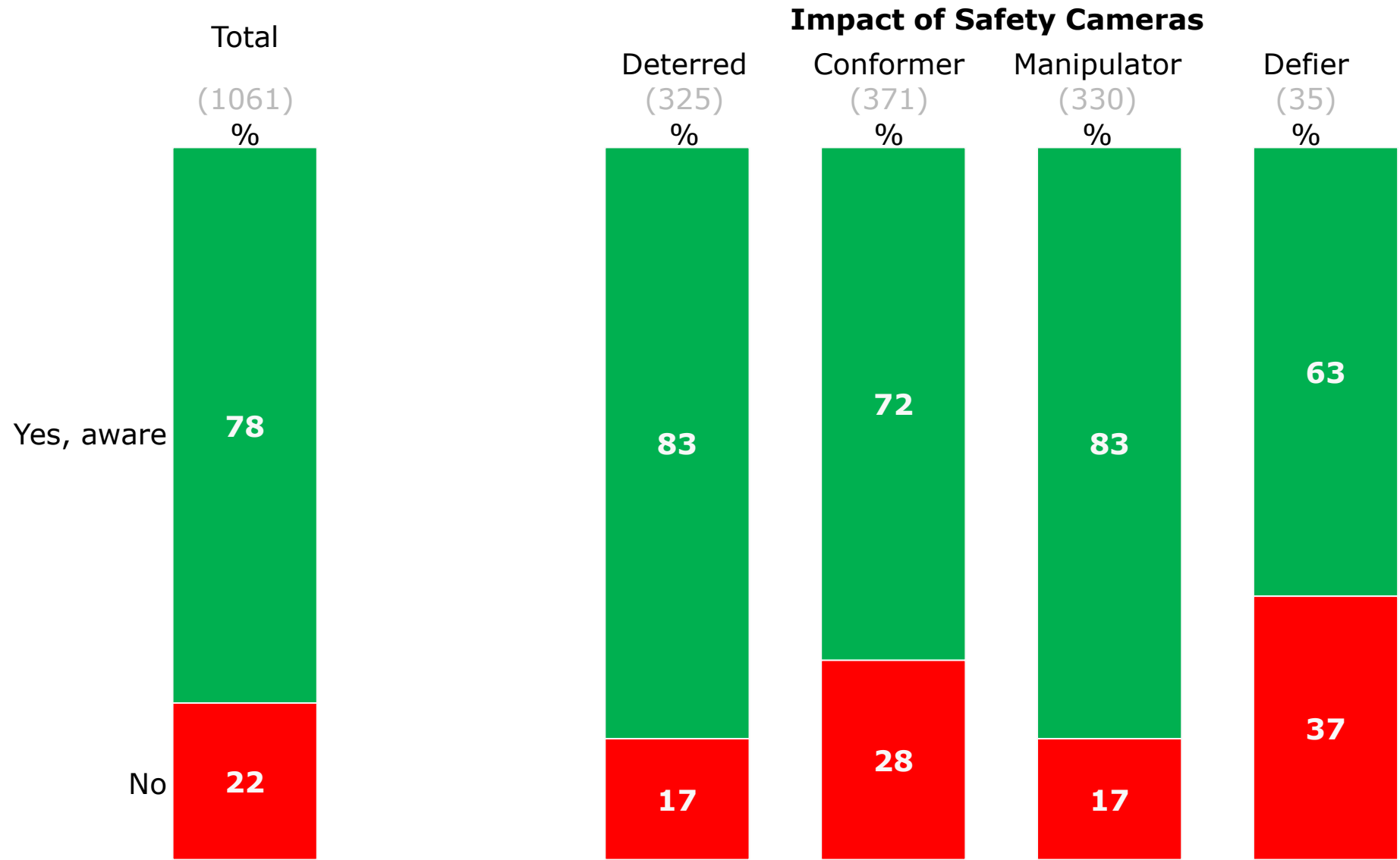
Base: All Motorists N – 1,061

Agree Strongly	Total	Agree Strongly				
		They make money for the Gardai / Government	They make the roads safer	They save lives	They have no effect on speeding	They're just a nuisance
They make money for the Gardai/Government	37%	100%	29%	31%	47%	74%
They make the roads safer	45%	36%	100%	91%	50%	25%
They save lives	46%	38%	91%	100%	51%	26%
They have no effect on speeding	10%	13%	11%	11%	100%	44%
They're just a nuisance	7%	14%	4%	4%	31%	100%

Amidst the general positivity, negative attitudes to safety cameras are often mixed with cynicism: 74% of motorists who consider safety cameras 'just a nuisance' also believe they 'make money for the Gardai/Government'.

Awareness of Rationale for Placement of Safety Cameras

Base: All Motorists N – 1,061



Awareness of rationale for placement is high (albeit weaker among Defiers).

Q. Prior to this interview, were you aware that Safety cameras are placed in locations where speeding has been identified as a factor in a collision causing fatal or serious injury?

Alcohol



Lifestyle Alcohol Consumption: How Often do you Drink Alcohol

Base: All Motorists N – 1,061

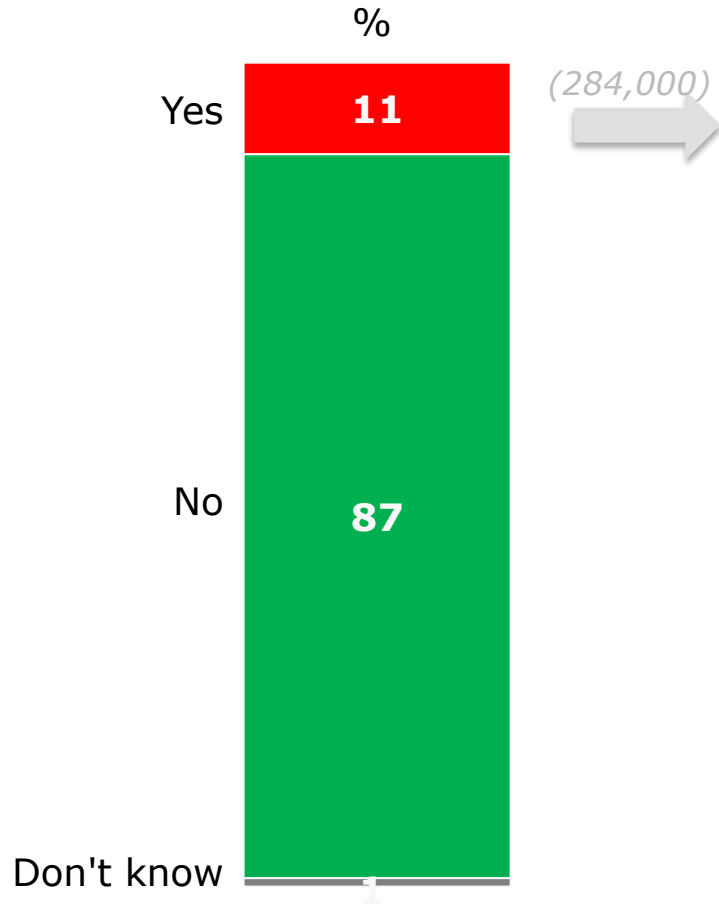
	Total	Gender		Age					Social Class			Area	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Urban	Rural
<i>Base:</i>	1061	567	494	90	231	345	253	142	437	550	74	681	380
	%	%	%	%	%	%	%	%	%	%	%	%	%
Every day/most days	1	1	0	0	0	1	1	1	2	0	-	1	1
4-5 days a week	2	3	1	1	3	2	1	3	2	2	0	3	0
2-3 days a week	15	18	11	14	13	15	17	14	17	13	17	17	12
Once a week	30	34	27	37	35	31	29	17	32	30	27	29	32
Once or twice a month	17	15	18	27	22	17	12	11	17	17	13	17	17
Once every couple of months	8	6	10	7	12	8	7	3	8	7	7	7	9
Less than this or never	23	19	28	4	12	22	32	45	20	26	30	22	26
Don't know/Refused	3	3	3	-	3	4	4	6	2	5	2	4	3
Weekly +	48	56	39	52	51	49	48	35	53	45	44	50	45

Approximately 1 in 2 Irish adults (48%) drink alcohol on a weekly basis; with this incidence very consistent across age groups up to 65 years.

Q. Approximately how often do you drink alcohol?

Driven a Motor Vehicle After Consuming Any Alcohol (Past 12 Months)

Base: All Motorists N – 1,061



Last Occasion – how much drank	
	%
Less than 1 drink	12
1 drink	49
2 drinks	25
3+ drinks	12

(Pop. Estimate)

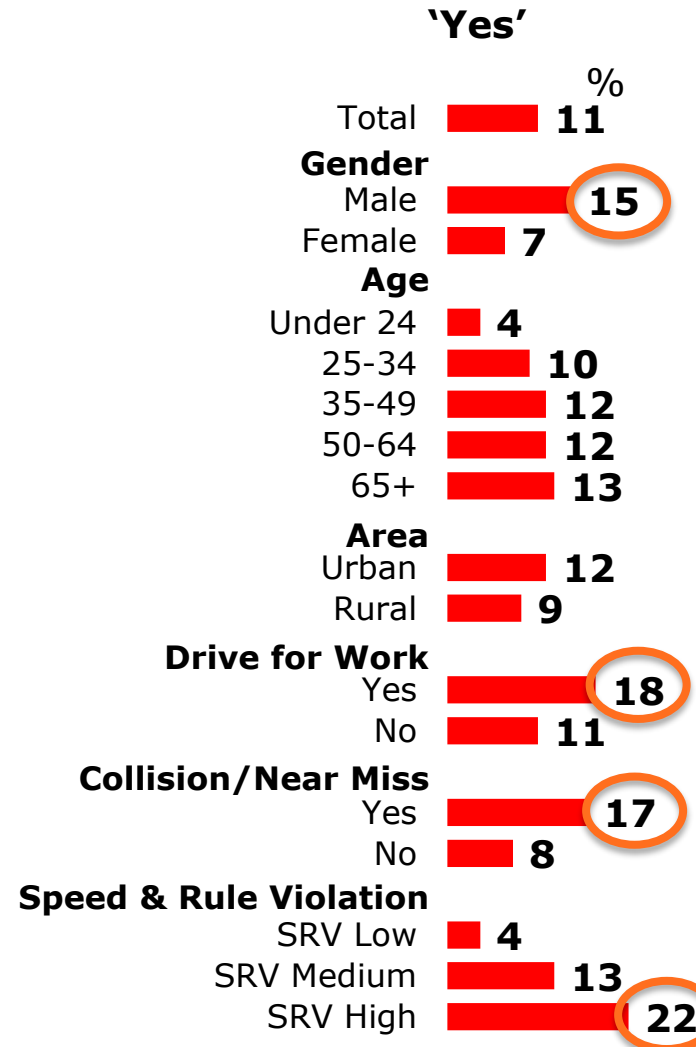
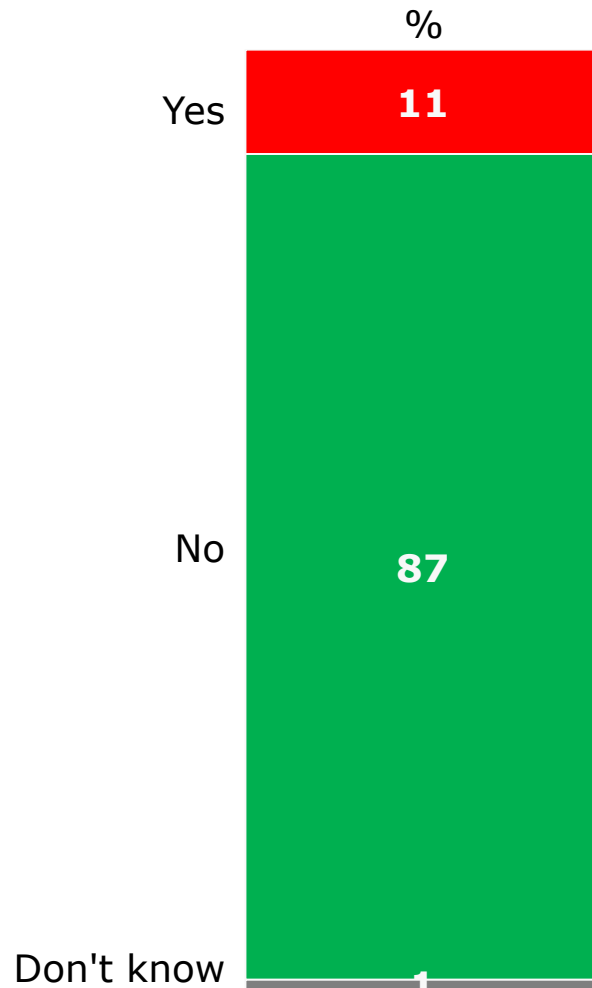
Over 1 in 10 motorists (284,000 population estimate) consumed alcohol before driving in the past 12 months.



- Q. In the last 12 months have you driven a motor vehicle after consuming any alcoholic drink?
- Q. On the last occasion how much alcohol did you drink?

Driven a Motor Vehicle After Consuming Any Alcohol (Past 12 Months)

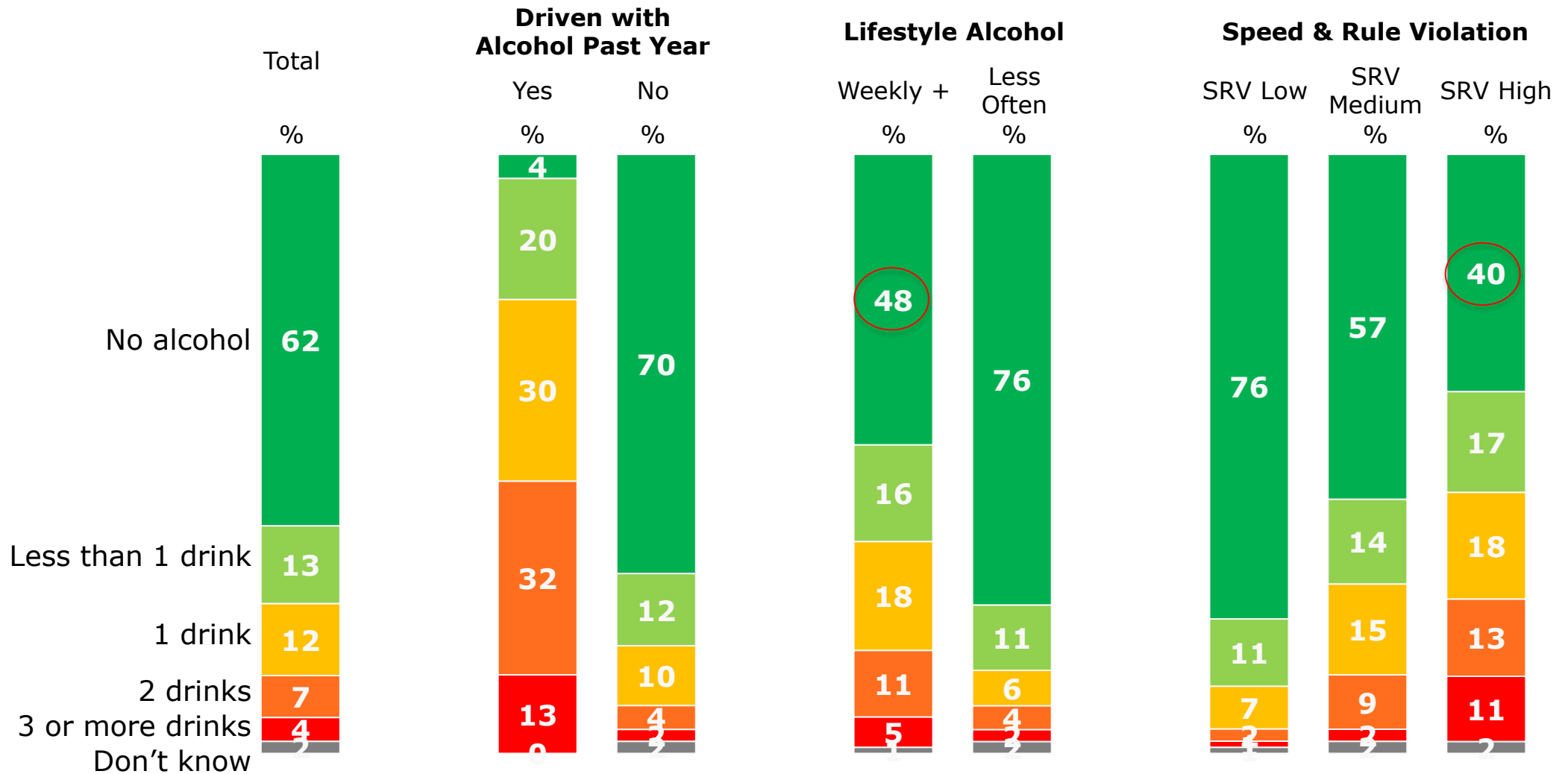
Base: All Motorists N – 1,061



Incidence of alcohol consumption much higher among those who drive for work; those who have had a collision/near miss in recent years; and high speeding and rule violators.

How Much Alcohol Can You Consume and Be Safe to Drive?

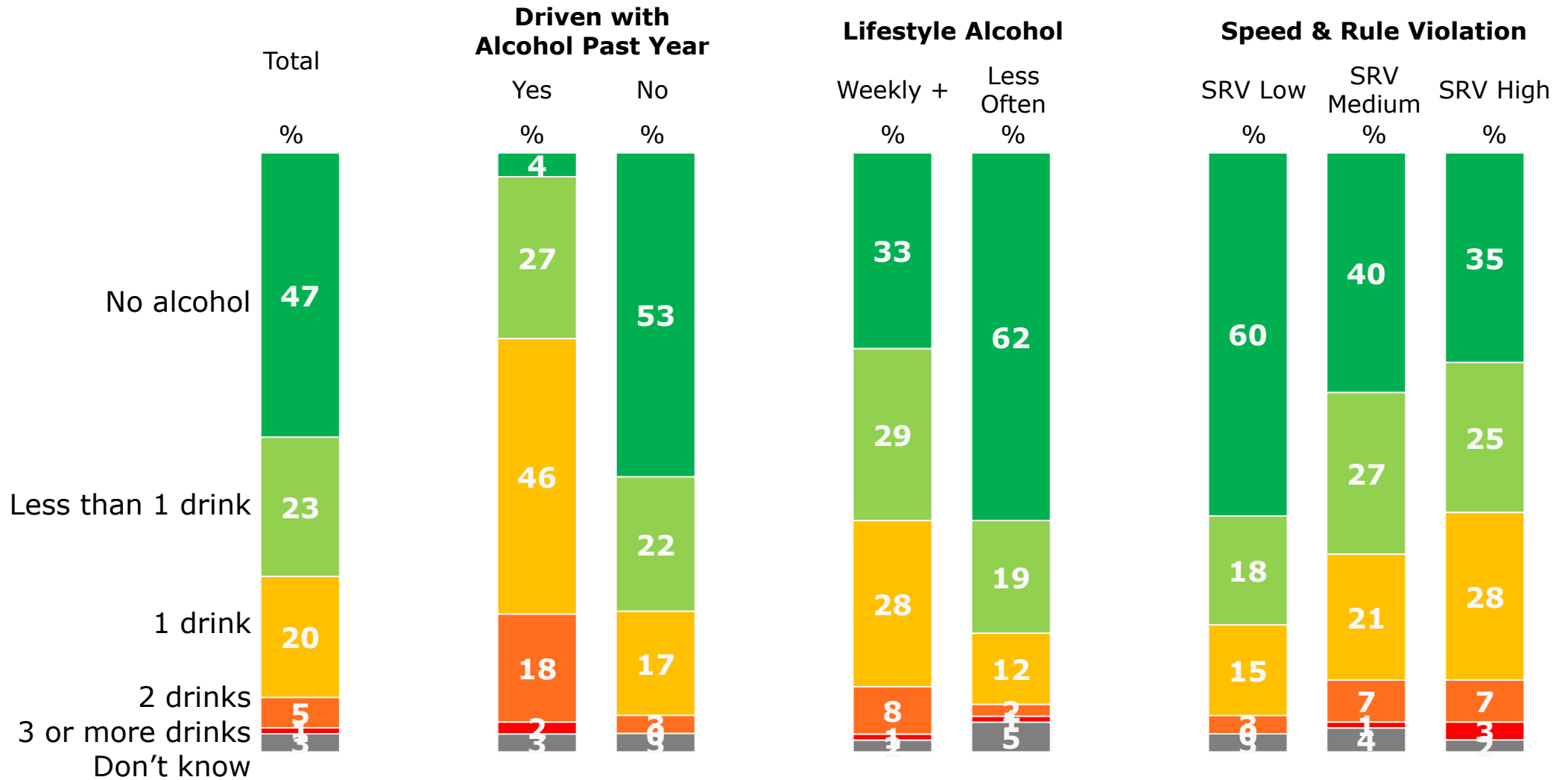
Base: All Motorists N – 1,061



62% of Irish motorists claim to have a 'no alcohol limit' before driving; but this declines to 48% of weekly drinkers and to 40% of those with high Speeding and Rule Violation.

How Much Alcohol Can You Consume and Remain Under the Legal Limit

Base: All Motorists N – 1,061



Understanding of the 'legal limit' varies widely by our use of alcohol.

Medication & Drugs and Driving

Base: All Motorists N – 1,061

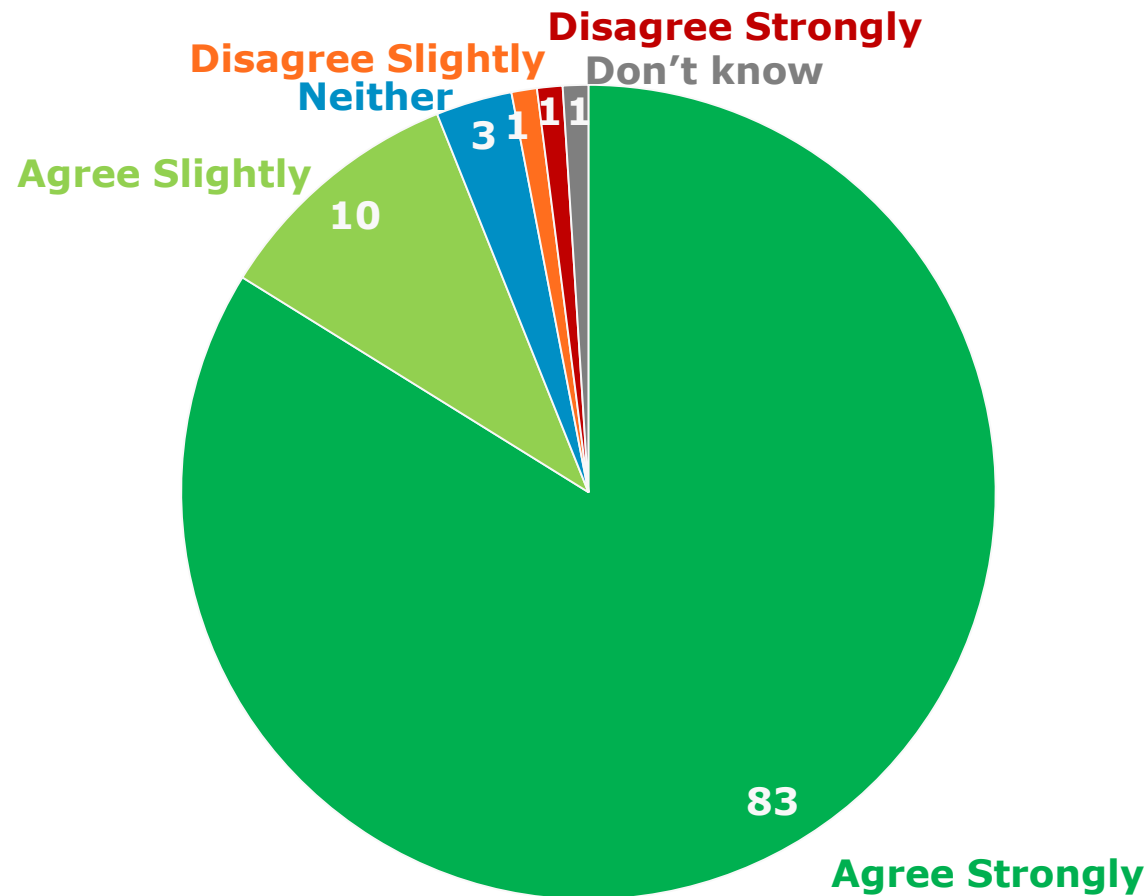
	Total	Driven with Alcohol Past Year	
		Yes	No
<i>Base:</i>	1,061 %	116 %	924 %
Travelled in car where driver had taken illicit drugs	2	2	2
Driving in past 12 months after taking...			
Prescription medicines	21	30	20
OTC medicines	24	32	23
Illicit drugs	0	0	0
Any	36	46	35

Those who have driven after consuming alcohol are also more likely to have driven after taking prescription/OTC medicines in past 12 months.

- Q. In the last 12 months have you ever travelled in a vehicle where you knew or found out later the driver had taken illicit drugs (such as cannabis, cocaine) prior to driving?
- Q. In the last 12 months have you taken any of the following and then driven a motor vehicle?

Support for Roadside Testing of Drug Use

Base: All Motorists N – 1,061



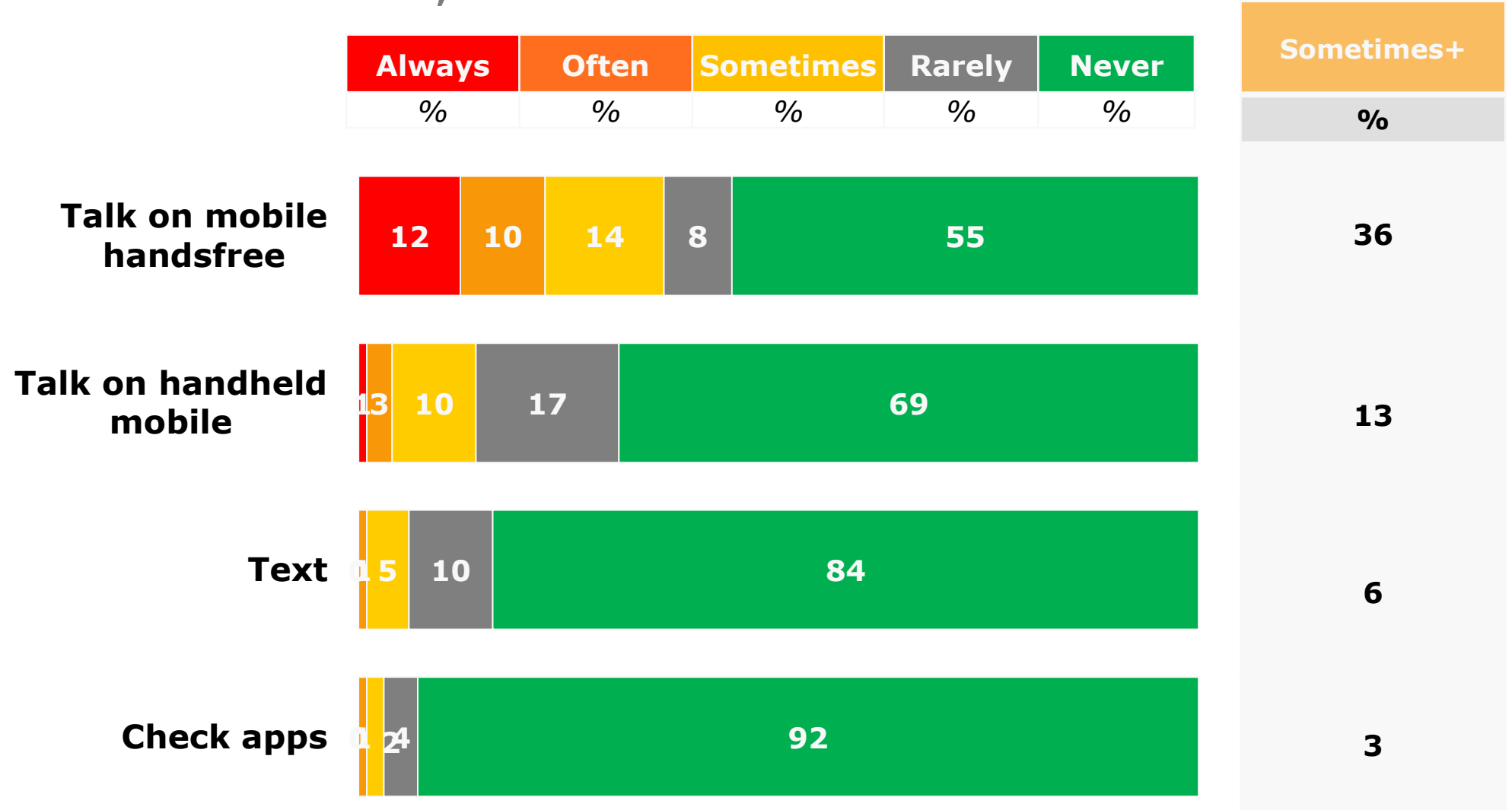
93% of motorists agree (strongly/slightly) that An Garda Síochána should have the power to conduct roadside testing for drug use.

Mobile Behaviour



Driving Behaviour: Mobile Phones

Base: All motorists N – 1,061

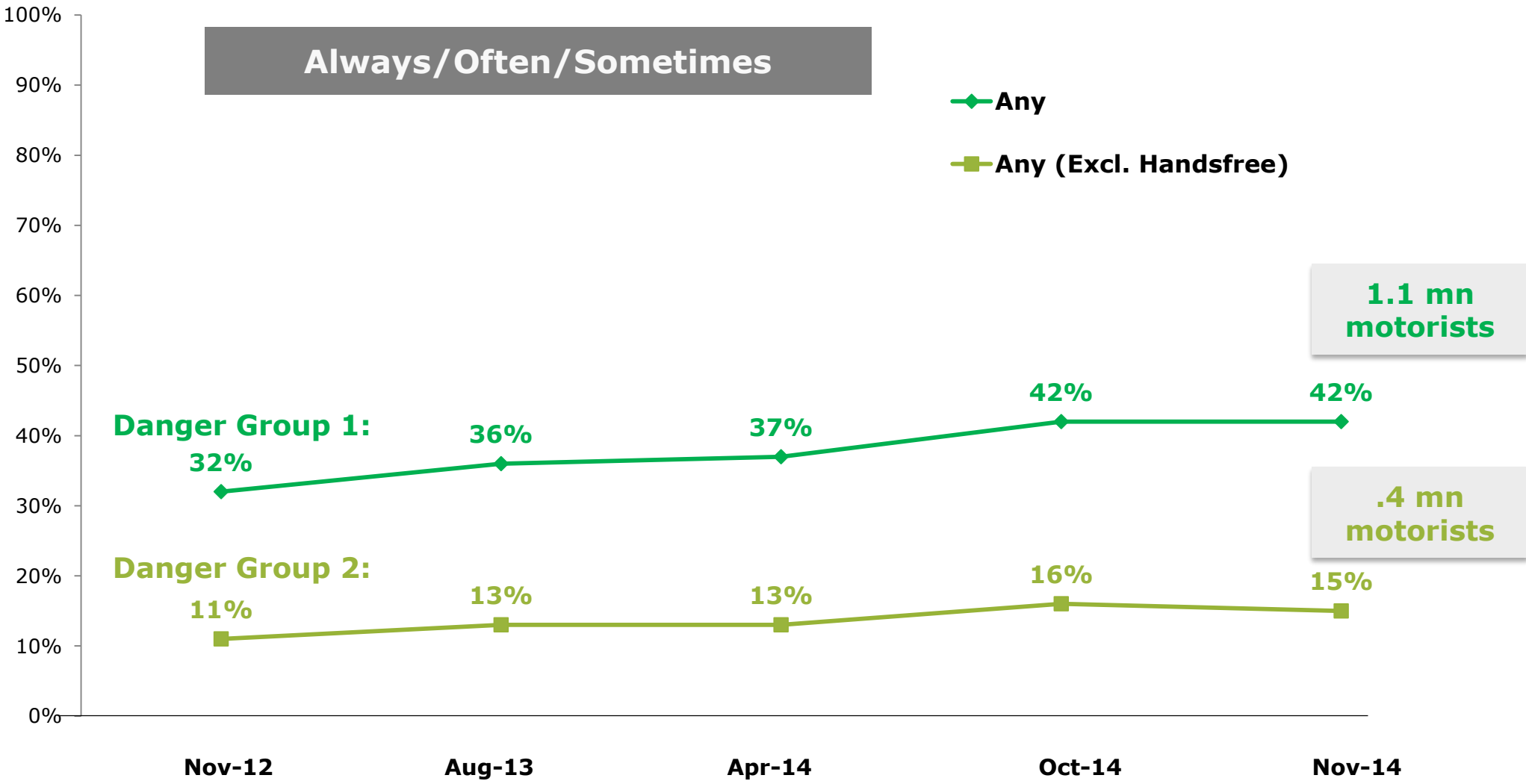


42% of motorists do at least one of the above behaviours 'sometimes' or more often.

- Q. How often would you drive and talk on a mobile phone that is "hands free"?
- Q. How often do you drive and talk on a mobile phone that is "handheld"? that is, you need to hold it as you speak
- Q. How often do you drive and text or use messaging on a mobile phone?
- Q. How often do you drive and check apps on your mobile phone including email and social media?

Driving Behaviour: Mobile Phones

Base: All Motorists N – 1,061



42% of motorists do at least one of the mobile behaviours in car 'sometimes' or more often. Corresponding figures in April '14 was 37%, Aug '13 was 36% and Nov '12 was 32%.



- Q. How often would you drive and talk on a mobile phone that is "hands free"?
- Q. How often do you drive and talk on a mobile phone that is "handheld"? that is, you need to hold it as you speak
- Q. How often do you drive and text or use messaging on a mobile phone?
- Q. How often do you drive and check apps on your mobile phone including email and social media?

Driving Behaviour: Mobile Phones

Base: All motorists N –1,061

SOMETIMES/ OFTEN/ ALWAYS	Total	Gender		Age					Social Class			Area	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Urban	Rural
Base (unweighted):	1061	567	494	90	231	345	253	142	437	550	74	681	380
	%	%	%	%	%	%	%	%	%	%	%	%	%
Talk on mobile handsfree	36	41	30	41	46	42	25	15	42	30	33	37	34
Talk on handheld mobile	13	17	10	21	24	13	8	2	12	14	14	12	16
Text	6	7	5	16	9	7	1	2	6	6	7	6	6
Check your apps	3	4	2	8	5	3	1	1	3	3	5	3	3
Danger Group 1: Any	42	48	36	57	55	47	30	16	48	37	35	43	41
Danger Group 2: Excl. Handsfree	15	19	12	27	27	15	8	3	15	16	14	14	17

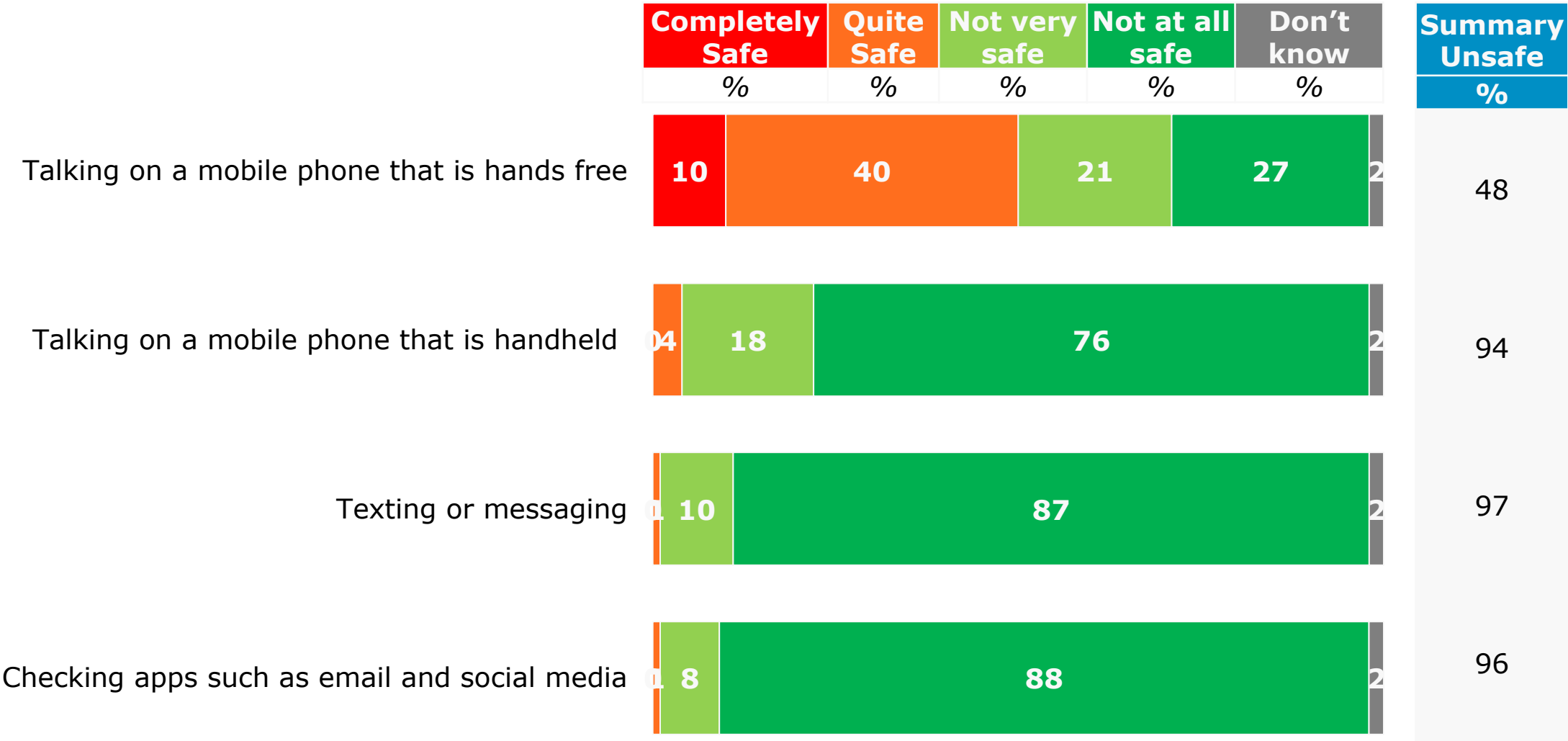
Mobile phone use while driving exhibits a strong demographic pattern, being most apparent among males and under 34 years.



- Q. How often would you drive and talk on a mobile phone that is "hands free"?
- Q. How often do you drive and talk on a mobile phone that is "handheld"? that is, you need to hold it as you speak
- Q. How often do you drive and text or use messaging on a mobile phone?

Safety of Mobile Phone in Car Behaviour

Base: All motorists N –1,061



Despite the incidence of use, there is wholesale acceptance of the safety risks attached to handheld, texting and app checking on mobile phones in car.

Safety of Mobile Phone in Car Behaviour

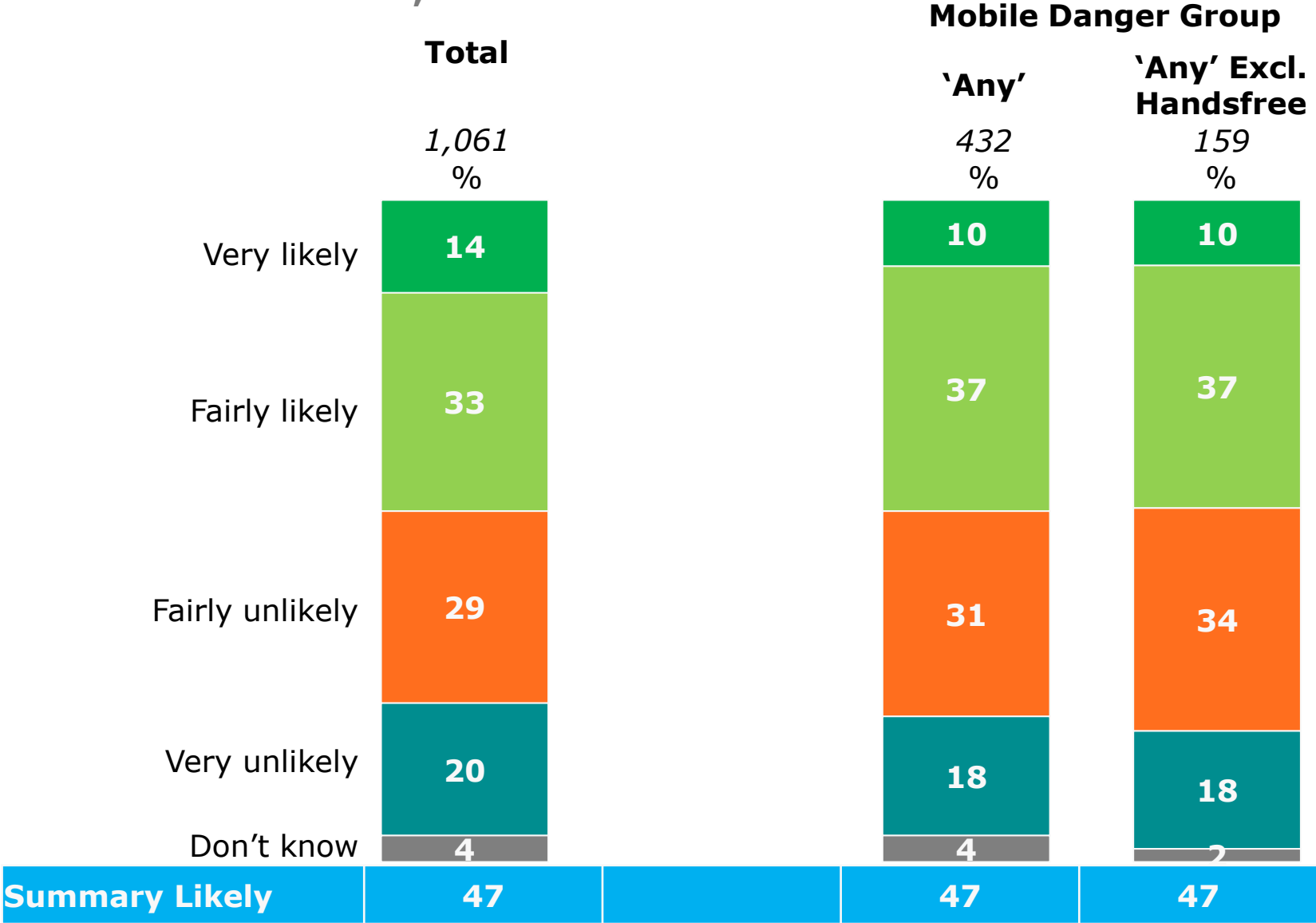
Base: All motorists N –1,061

Summary Unsafe	Total	Mobile Danger Group	
		Danger Group 1: 'Any'	Danger Group 2: 'Any Excl. Handsfree'
<i>Base:</i>	1061	432	159
	%	%	%
Talking on a mobile phone that is hands free	48	22	29
Talking on a mobile phone that is handheld	94	91	82
Texting or messaging	97	97	95
Checking apps such as email and social media	96	95	93

The threat to safety of in car mobile phone behaviour is not overly challenged by the 'danger groups'.

Mobile Phone Behaviour – Likelihood of Being Caught

Base: All motorists N – 1,061

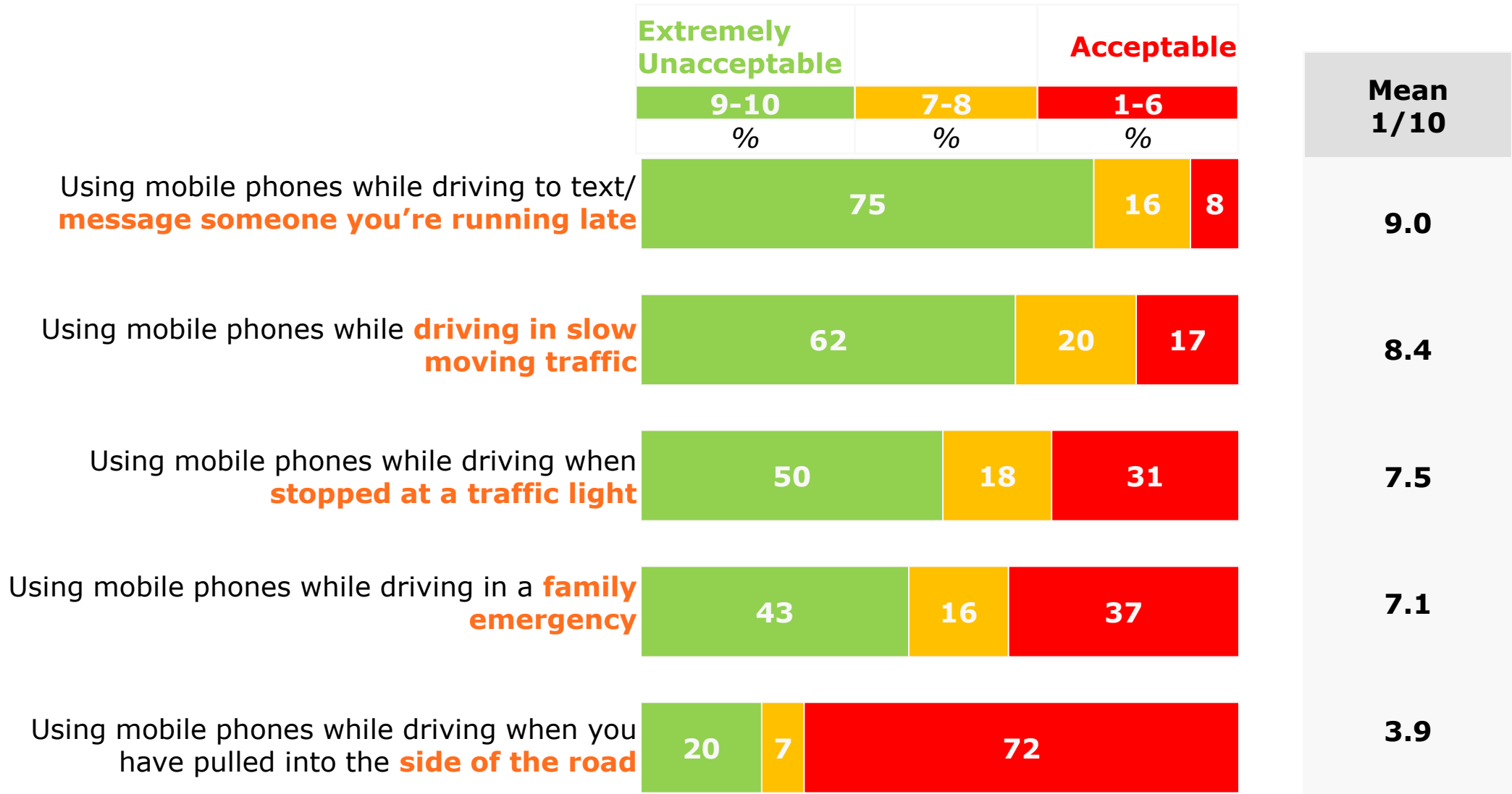


Less than half of all motorists consider it 'likely' that mobile phone in car behaviour will be caught by the police; and 1 in 5 (20%) consider it very unlikely.

Q. How likely or unlikely do you think it is that someone using a mobile phone whilst driving will get caught by the police?

Mobile Phone Behaviour: Acceptable/Unacceptable

Base: All motorists N – 1,061



Over 30% of motorists consider mobile phone use to be broadly 'acceptable' when stopped at a traffic light.



Q. I am now going to read out some various types of **mobile phone** behaviour and for each one, I would like you to tell me how acceptable or unacceptable you think it is for drivers to do these things. A score of one means you think the behaviour is fairly acceptable and a score of ten means you think it is extremely unacceptable?

Mobile Phone Behaviour: Acceptable/Unacceptable

Base: All motorists N –1,061

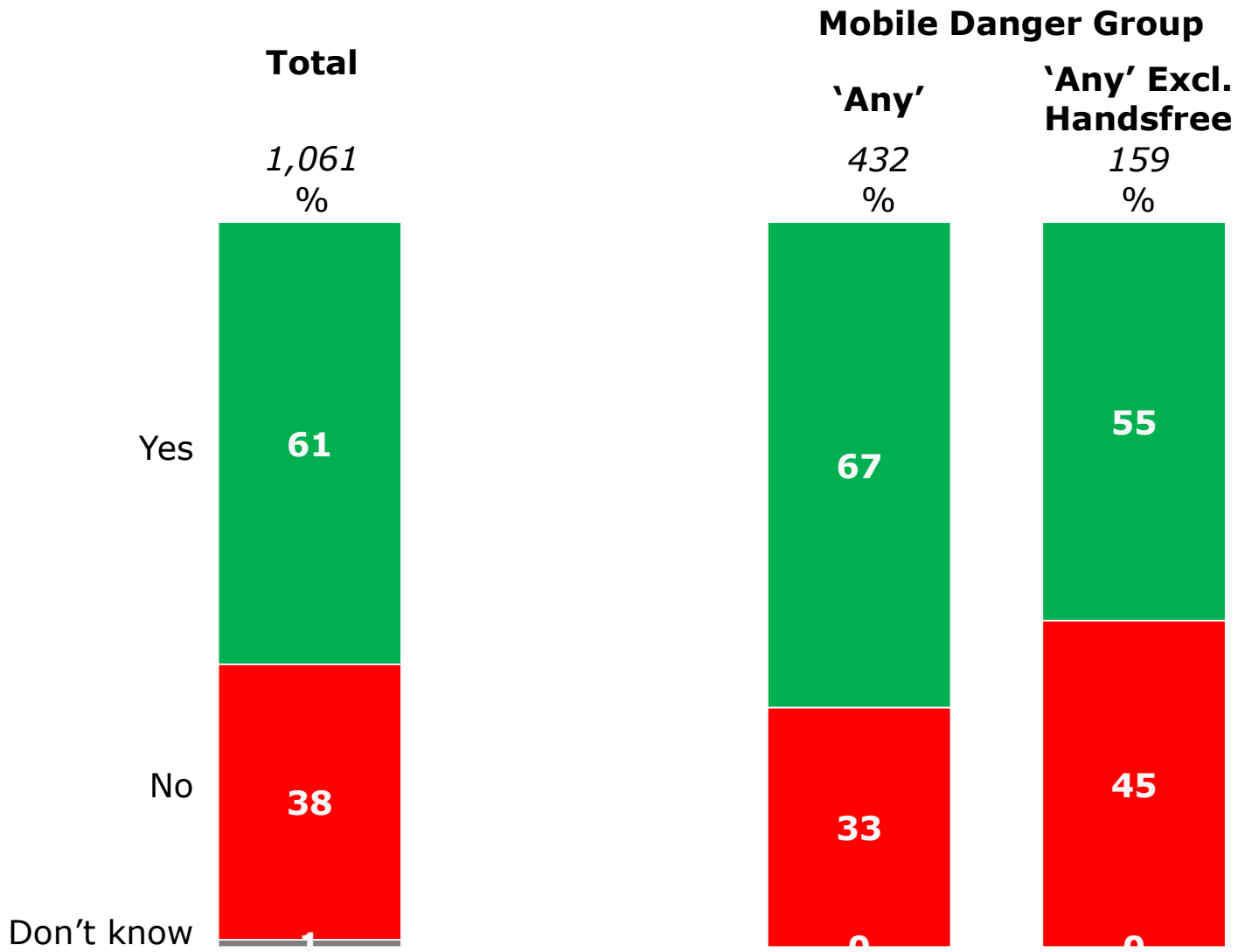
Mean Scores 10 Unacceptable – 1 Acceptable	Total	Mobile Danger Group	
		Danger Group 1: 'Any'	Danger Group 2: 'Any Exc. Handsfree'
<i>Base:</i>	1061	432	159
	%	%	%
Using mobile phones while driving to text/ message someone you're running late	9.0	8.5	7.8
Using mobile phones while driving in slow moving traffic	8.4	7.8	6.6
Using mobile phones while driving when stopped at a traffic light	7.5	6.7	5.8
Using mobile phones while driving in a family emergency	7.1	6.3	5.6
Using mobile phones while driving when you have pulled into the side of the road	3.9	3.3	3.4

The permissive attitudes of danger group 2 (excl. handsfree) are entirely in keeping with their more pervasive in car mobile behaviour.

Q. I am now going to read out some various types of mobile phone behaviour and for each one, I would like you to tell me how acceptable or unacceptable you think it is for drivers to do these things. A score of one means you think the behaviour is fairly acceptable and a score of ten means you think it is extremely unacceptable?

Mobile Phone Behaviour – Awareness of Penalty Points

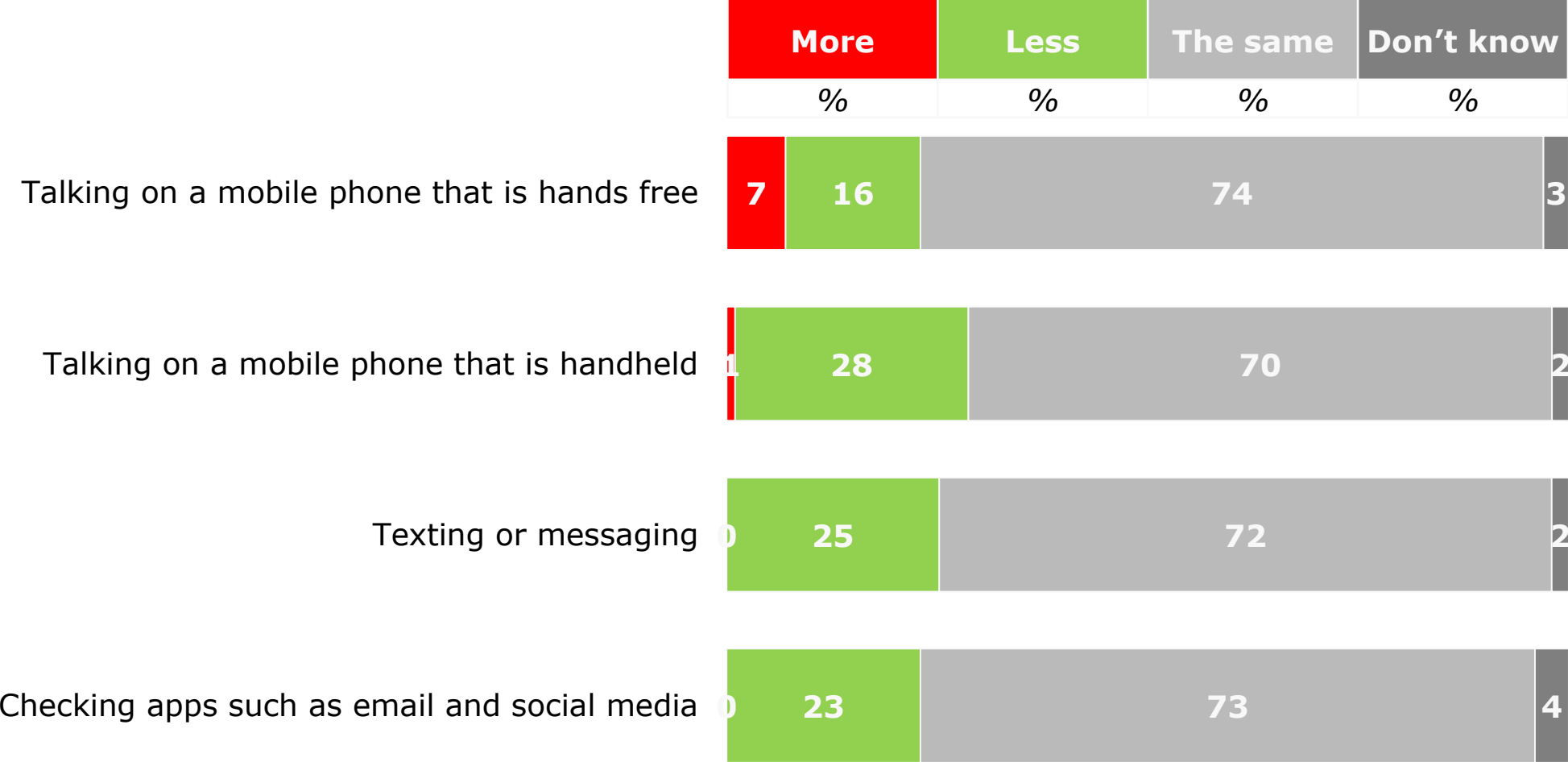
Base: All motorists N –1,061



Just over half of the second danger group are aware of the rise in penalty points for using a mobile phone while driving.

Impact of Increase in Penalty Points on Mobile Phone Behaviour

Base: All Aware of the Increase in Penalty Points N - 653



Impact of Increase in Penalty Points for Mobile Phone Behaviour

Base: All Aware of the Increase in Penalty Points N - 653

' Less'	Total	Mobile Danger Group	
		Danger Group 1: Any	Danger Group 2: Any excl. Handsfree
<i>Base:</i>	653	294	89
	%	%	%
Talking on a mobile phone that is hands free	16	16	26
Talking on a mobile phone that is handheld	28	37	52
Texting or messaging	25	35	46
Checking apps such as email and social media	23	31	42

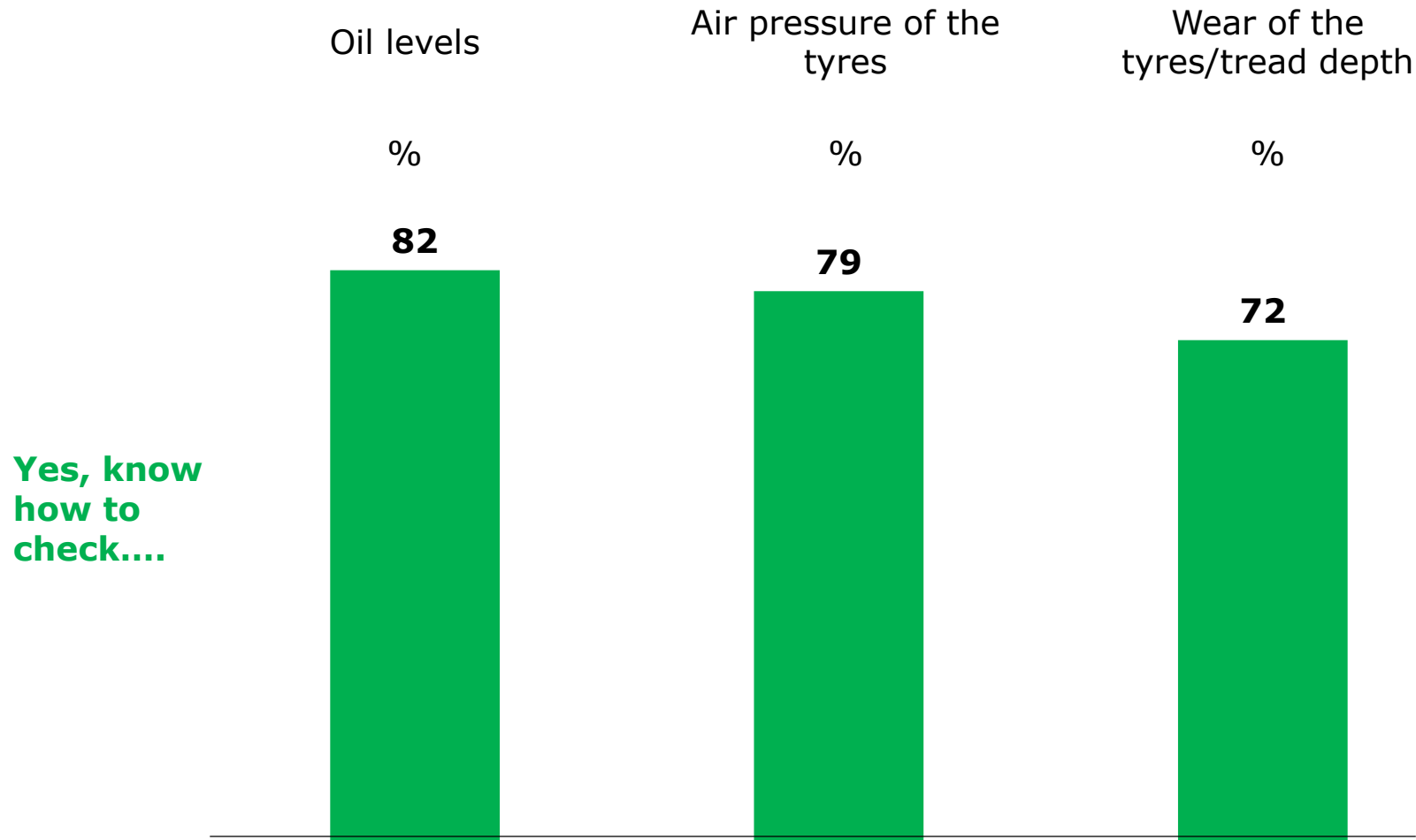
The penalty points initiative clearly has had a positive impact on in car mobile behaviours; suggesting further efforts to raise awareness of the rise in penalty points would be beneficial.

Car Checks



Car Checks: Knowledge

Base: All Motorists N – 1,061



The majority of motorists consider themselves able to conduct the series of key checks.

Car Checks: Knowledge

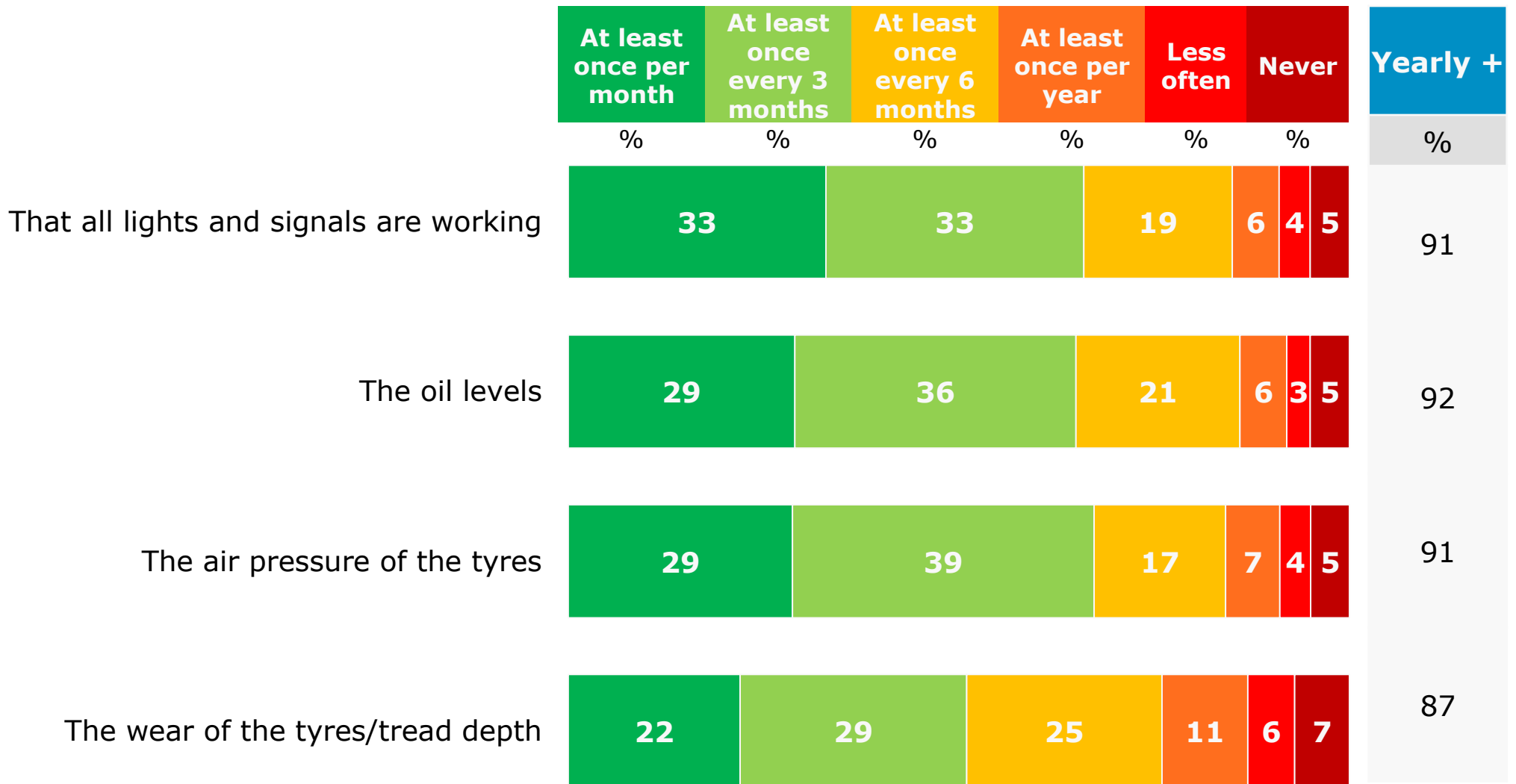
Base: All Motorists N – 1,061

	Total	Gender		Age				
		Male	Female	-24	25-34	35-49	50-64	65+
<i>Base:</i>	1061	567	494	90	231	345	253	142
	%	%	%	%	%	%	%	%
The oil levels	82	96	68	78	84	84	81	79
The air pressure of the tyres	79	97	59	76	80	78	79	78
The wear of the tyres/tread depth	72	93	50	70	70	73	71	76

However, knowledge varies considerably by gender.

Frequency of Car Checks

Base: All Motorists N – 1,061

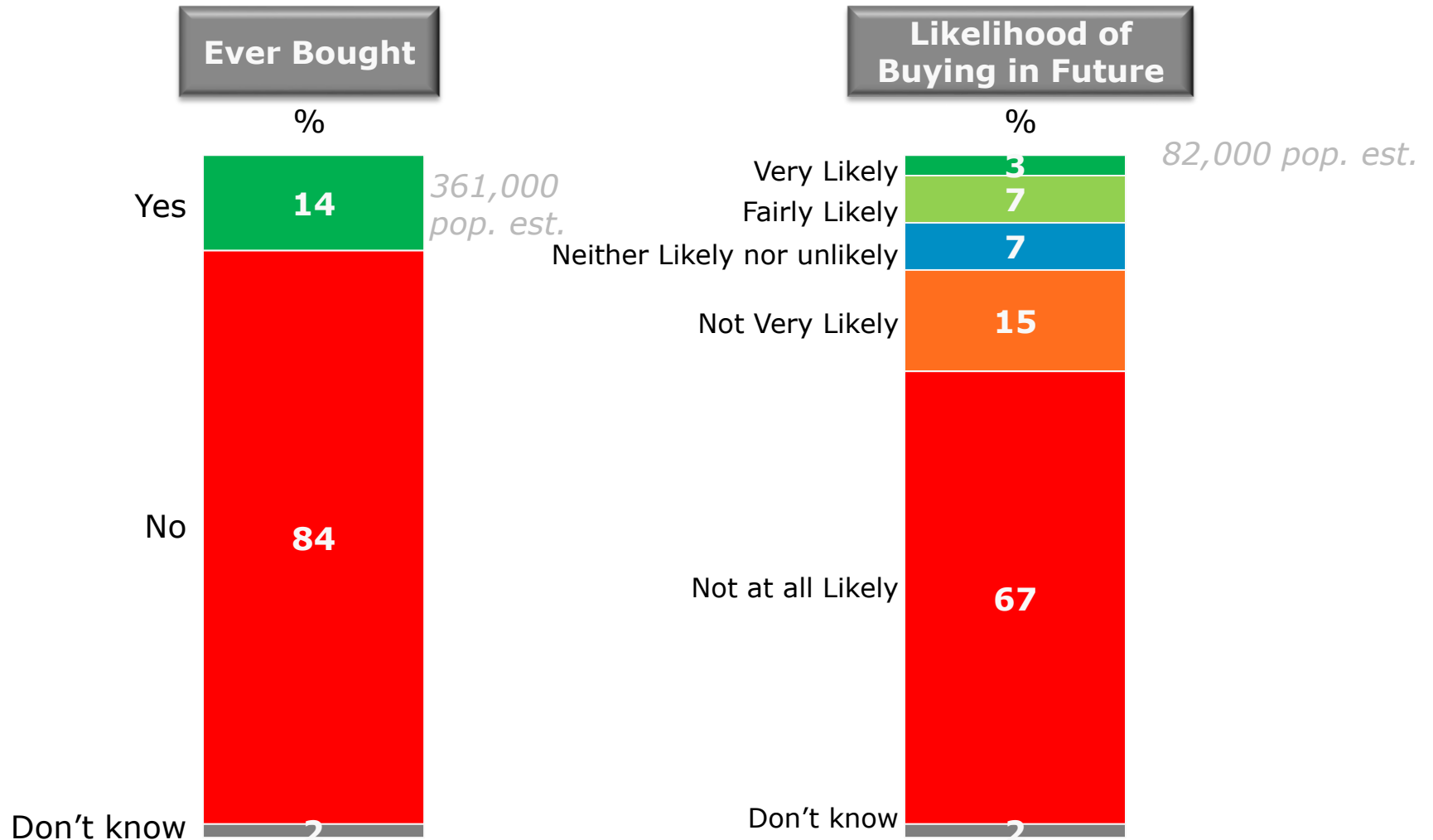


Compliance with yearly car checks appears high.

Q. How often, if at all, are the following checked in your car (either by you or someone else in your household)?

Part-Worn Tyres

Base: All Motorists N – 1,061



14% of motorists (361,000) have ever purchased part-worn tyres; however, only 3% consider themselves very likely to do so if an immediate need arose. Both past and future purchase is much more likely among younger age groups.

Part-Worn Tyres: Ever Bought

Base: All Motorists N – 1,061

Ever Bought	Total	Gender		Age					Social Class			Region				Area	
		Male	Female	Under 24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base:	1061	567	494	90	231	345	253	142	437	550	74	310	271	294	186	681	380
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	14	16	12	24	22	12	9	8	11	18	7	16	16	12	12	16	11

Past purchase much more likely among under 34 years.

Part-Worn Tyres: Likelihood of Buying in Future

Base: All Motorists N – 1,061

Ever Bought	Total	Gender		Age					Social Class			Region				Area	
		Male	Female	Under 24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base:	1061	567	494	90	231	345	253	142	437	550	74	310	271	294	186	681	380
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Very Likely	3	3	4	8	4	3	2	1	4	3	1	3	4	4	2	3	3
Fairly Likely	7	8	6	15	10	6	3	3	5	9	4	7	5	7	8	7	6
Neither Likely nor unlikely	7	8	6	10	11	7	4	2	6	8	6	8	10	3	6	8	6
Not Very Likely	15	15	14	11	17	16	12	13	12	16	17	16	18	9	14	15	14
Not at all Likely	67	66	68	47	56	67	78	79	72	61	71	63	60	76	69	65	69
Don't know	2	1	2	9	2	1	0	1	1	2	-	1	3	1	1	1	2

Future purchase also appears much more likely among younger age group.

Car Servicing

Base: All Motorists N – 1,061

**Experienced Car
problems shortly
after service**

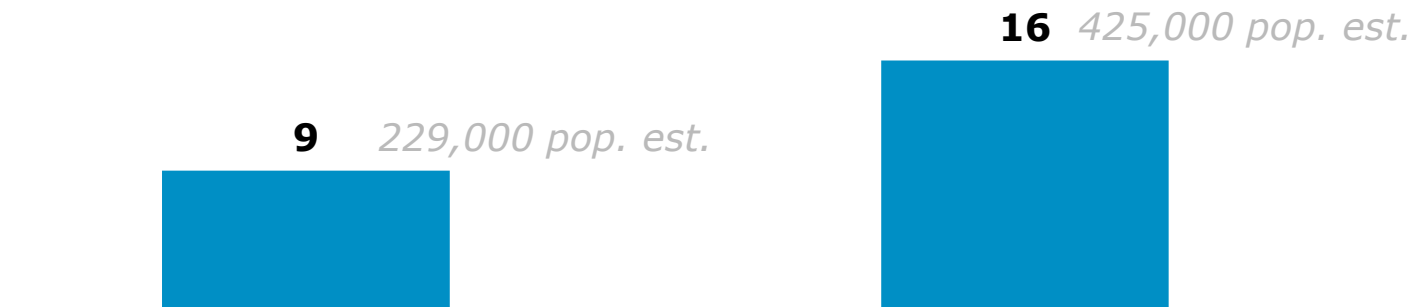
Yes

%

**Car non compliant
at NCT shortly after
service**

Yes

%



Strikingly, 16% of motorists (425,000) claim to have failed their NCT shortly after receiving an apparent 'all clear' from a car service.

- Q. Thinking of the last time you got your car serviced, in the following two weeks did you have any problems with your car that you felt should have been dealt with at the service?
- Q. Have you ever had a service prior to an NCT only to find that something you felt should have been dealt with at the service resulted in your car being non-compliant for the NCT?

Segmentation Analysis



Segmentation Analysis: Overview

- We wanted to identify groups or **segments** of motorists who engaged in one or more forms of errant behaviour (speeding and rule violation, mobile phone use, etc.) and investigate differences in demographics between segments.
- To do this we looked at motorists who had **similar response patterns** across a series of key questions relating to driver behaviour.
- We then segmented motorists based on these response patterns.
- **Three segments** were identified, which are broadly defined by increasingly poor driver behaviour (Good, Bad and Ugly).
- Finally, we ran an analysis, which looked at whether these segments differed significantly on **demographic and awareness** variables.

Segmentation Analysis: Overview

- **7 key questions** were used in the segmentation

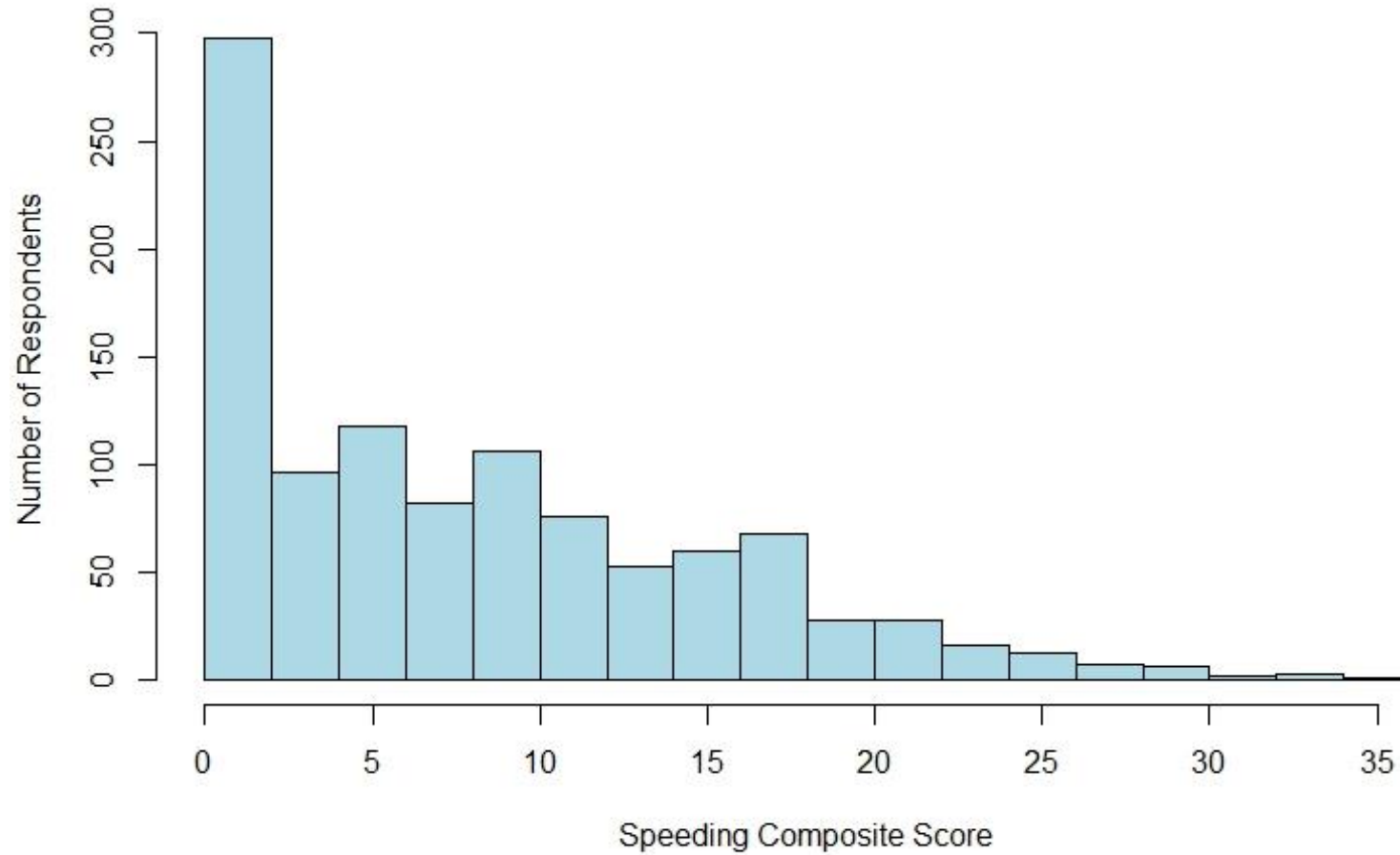
Behaviours	Question Summary	Q
Speeding & Rule Violation	How often do you exceed speed limits?	Q6a
Mobile Phone Use	How often do you use your mobile phone?	Q15b,c&d
Safety Camera Support	To what extent do you support or object to the use of safety cameras on the roads?	Q9d
Collision as Driver	Collision involvement in the last 5 years	Q8a
Near Miss as Driver	Near miss in the last 5 years	Q8b
Drink Drive	Driven a motor vehicle in the last 12 months after consuming alcohol	Q13a
Drug Drive	Driven a motor vehicle in the last 12 months after consuming illicit drugs	Q16b

Segmentation Analysis: Overview

- Some questions were used to create **composite scores**.
 - ❖ Q6a. had 8 questions relating to **speeding and rule violation**.
 - ❖ E.g. How often do you exceed 50kph speed limits by more than 10kph?
 - ❖ This question was used to create a composite speeding score, where **'Very Often'** responses were given the highest score, while **'Never'** was given a score of 0.
 - ❖ The maximum score was **40**.

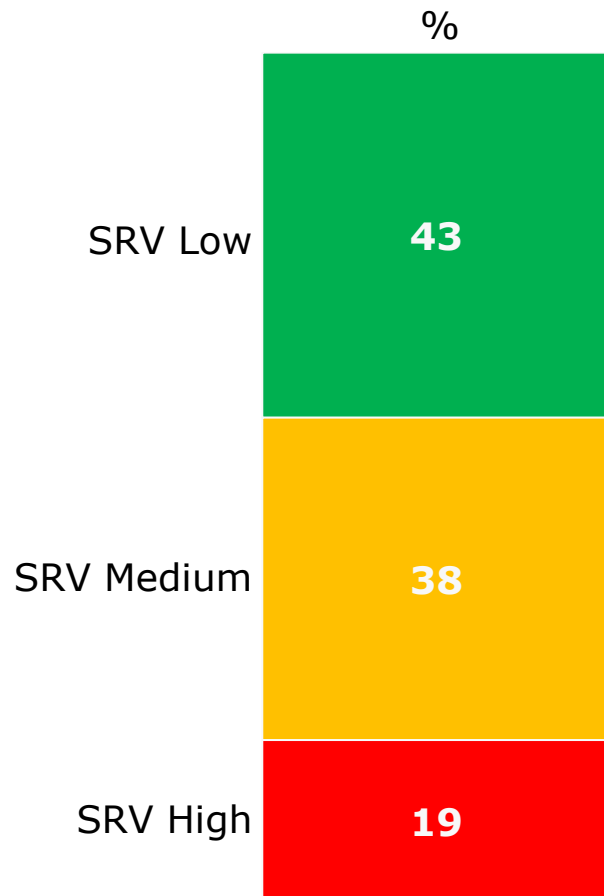
Segmentation Analysis: Overview

Speeding & Rule Violation Composite Score



Speeding & Rule Violation: Composite Score (Low/Medium/High)

Base: All Motorists N-1,061

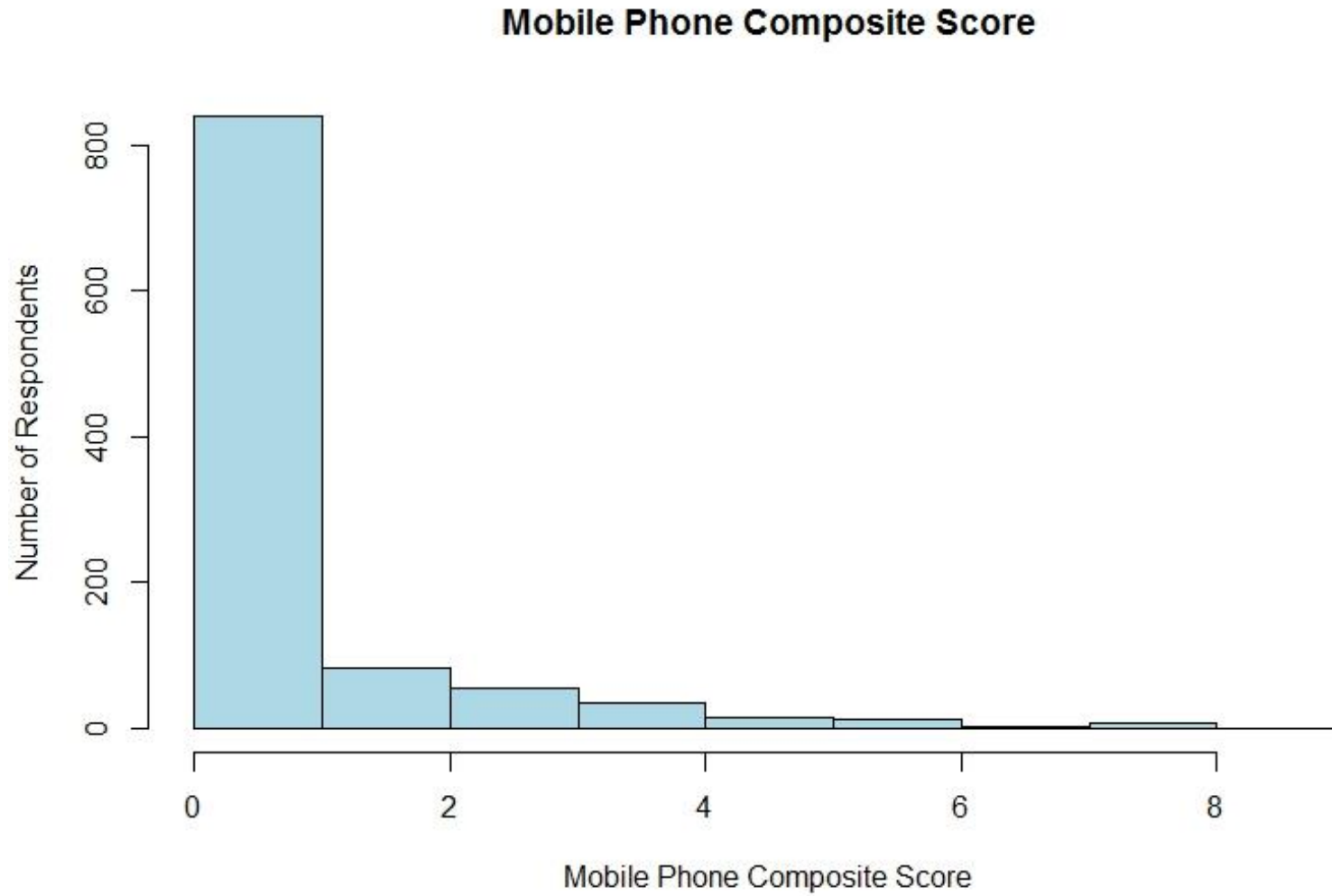


<i>SRV Composite Score – Weighting Matrix</i>					
	<i>Very Often</i>	<i>Often</i>	<i>Sometimes</i>	<i>Rarely</i>	<i>Never</i>
<i>Exceed 50km speed limits by less than 10km</i>	4	3	2	1	0
<i>Exceed 50km speed limits by more than 10km</i>	6	4.5	3	1.5	0
<i>Exceed 100km speed limits by less than 10km</i>	4	3	2	1	0
<i>Exceed 100km speed limits by more than 10km</i>	6	4.5	3	1.5	0
<i>Overtake the car in front even when it keeps appropriate speed (on roads with 100km or 120 km speed limit)</i>	4	3	2	1	0
<i>Break traffic rules to proceed faster</i>	6	4.5	3	1.5	0
<i>Drive faster to catch up on an appointment</i>	4	3	2	1	0
<i>Drive across LUAS tracks in front of an amber or red light</i>	6	4.5	3	1.5	0

Segmentation Analysis: Key Questions

- Q15b, c & d were also used to create a **composite mobile phone** use score.
 - ❖ How often do you drive and a)talk, b)text, c)check apps?
 - ❖ '**Always**' responses were given a score of **4** while '**Never**' was given a score of **0**.
 - ❖ The maximum score here was **12**.

Segmentation Analysis: Key Questions

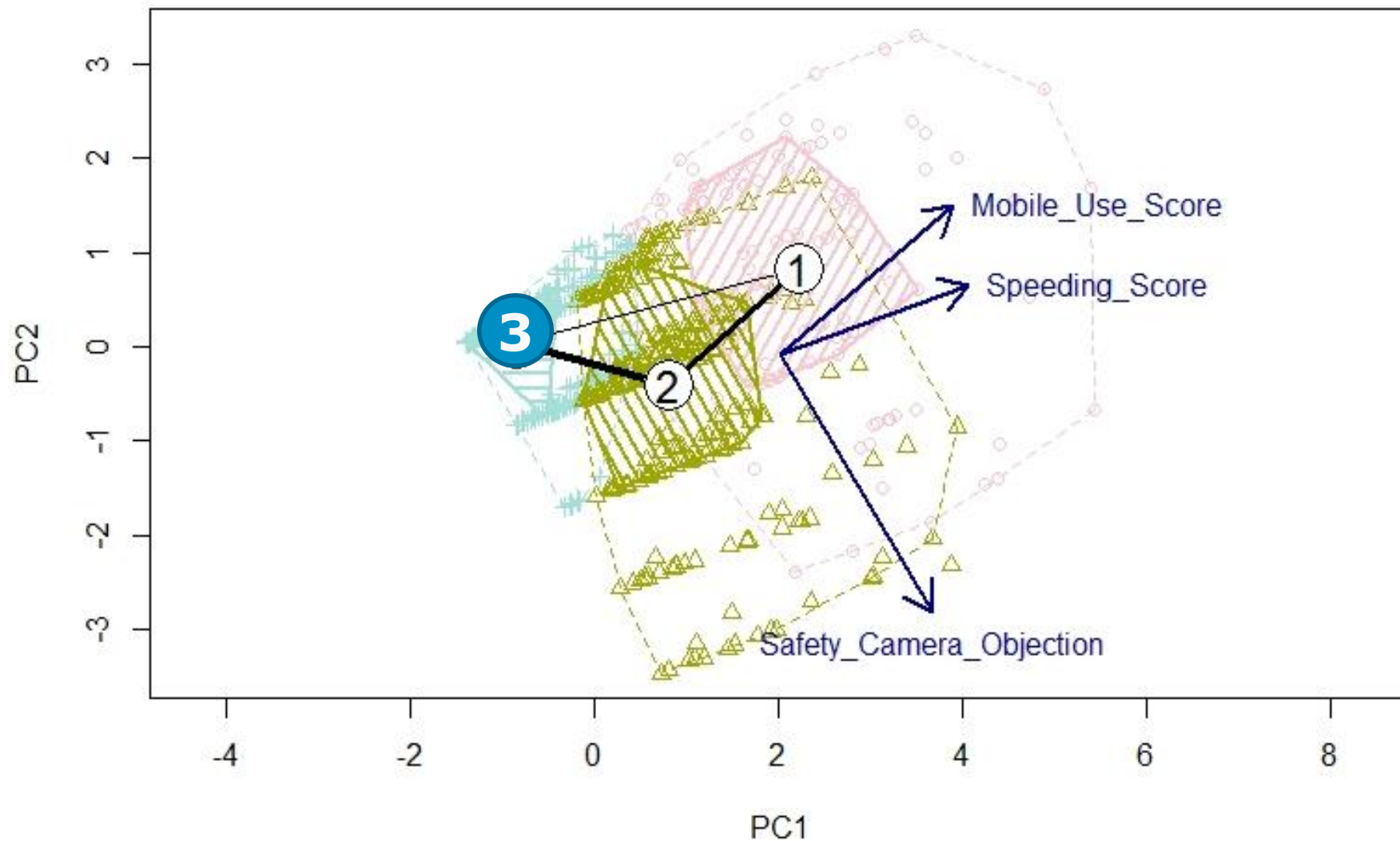


Segmentation Analysis: Clustering

- A **k-means-type** clustering was used to identify drivers that have similar responses to the 7 questions.
- **Three** segments were identified **(1)Good, (2)Bad and (3)Ugly.**
- Respondents' speed composite score and mobile phone composite score were the primary determinants of segment membership.

Segmentation Analysis: Clustering

Scatter Plot of respondents: location determined by answers to behavioural questions



Segment Behavioural Characteristics

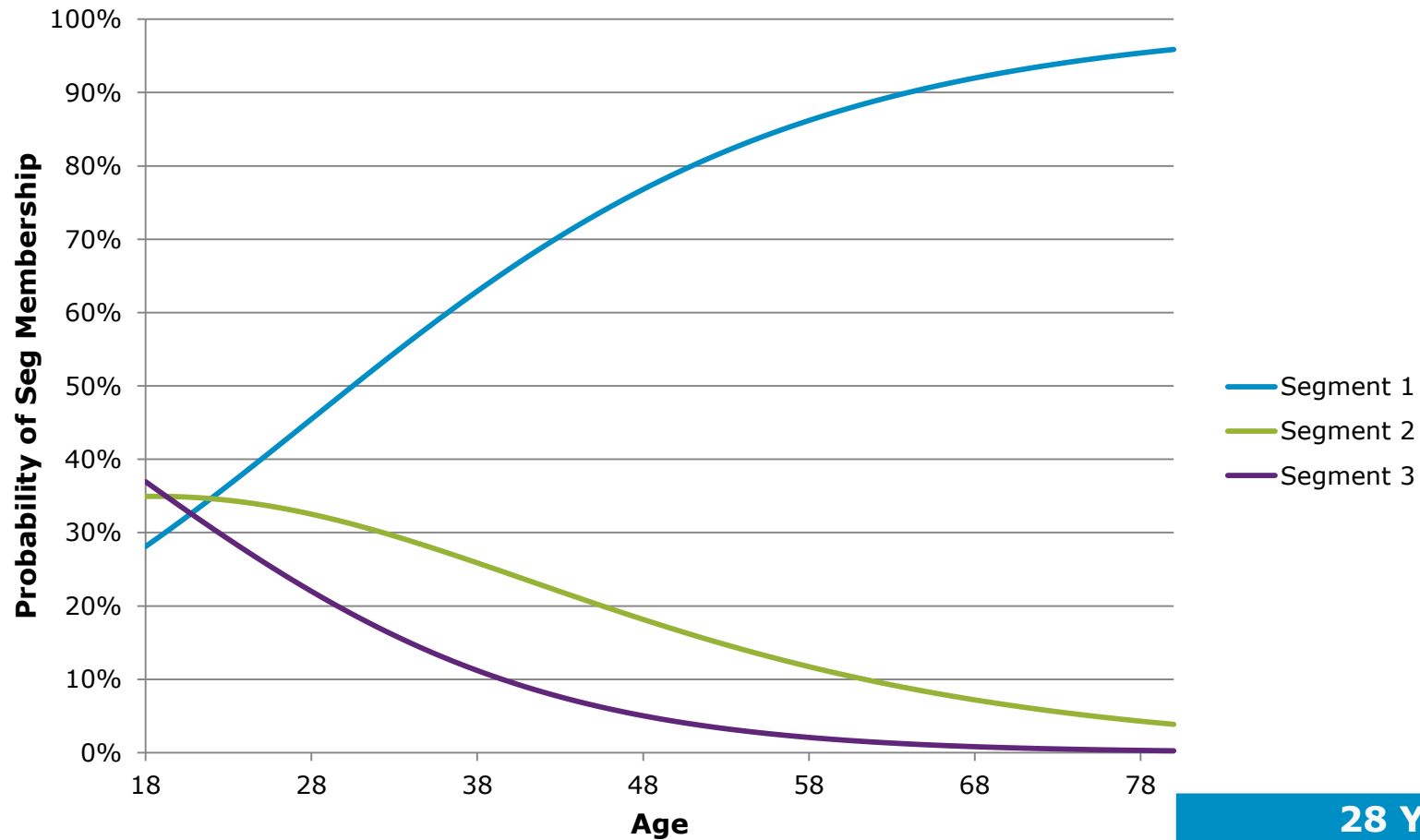
Behaviours	Segment 1 (61.0%)	Segment 2 (31.6%)	Segment 3 (11.8%)
Speeding	9%	36%	37%
Mobile Phone Use	2%	5%	36%
Safety Camera Support	98%	68%	65%
Collision as Driver	8%	16%	13%
Near Miss as Driver	78%	64%	64%
Drink Drive	6%	17%	21%
Drug Drive	0.2%	0.9%	0.8%

- Speeding % is relative to the maximum score of 40, which indicates 'Very Often' response to all statements in Q6a.
- Mobile Phone Use % is relative to the maximum score of 12, which indicates 'Always' response to Q15b-Q15d.
- Safety Camera Support indicates % of respondents who 'Strongly' or 'Somewhat' support the use of safety cameras.

Segment Behavioural Characteristics

- We identified **three segments**, based on behaviour.
- The next question is: Are there any significant differences in terms of respondent demographics; age/gender, etc.?
- A **Regression Model** was estimated to determine how significant the demographic variables were in determining segment membership.
- A number of variables turned out to be significant drivers of segment membership.
- **Age** and **Gender** are the two key determinants of segment membership.
- Other less influential characteristics include having **dependent children** and **social class**.

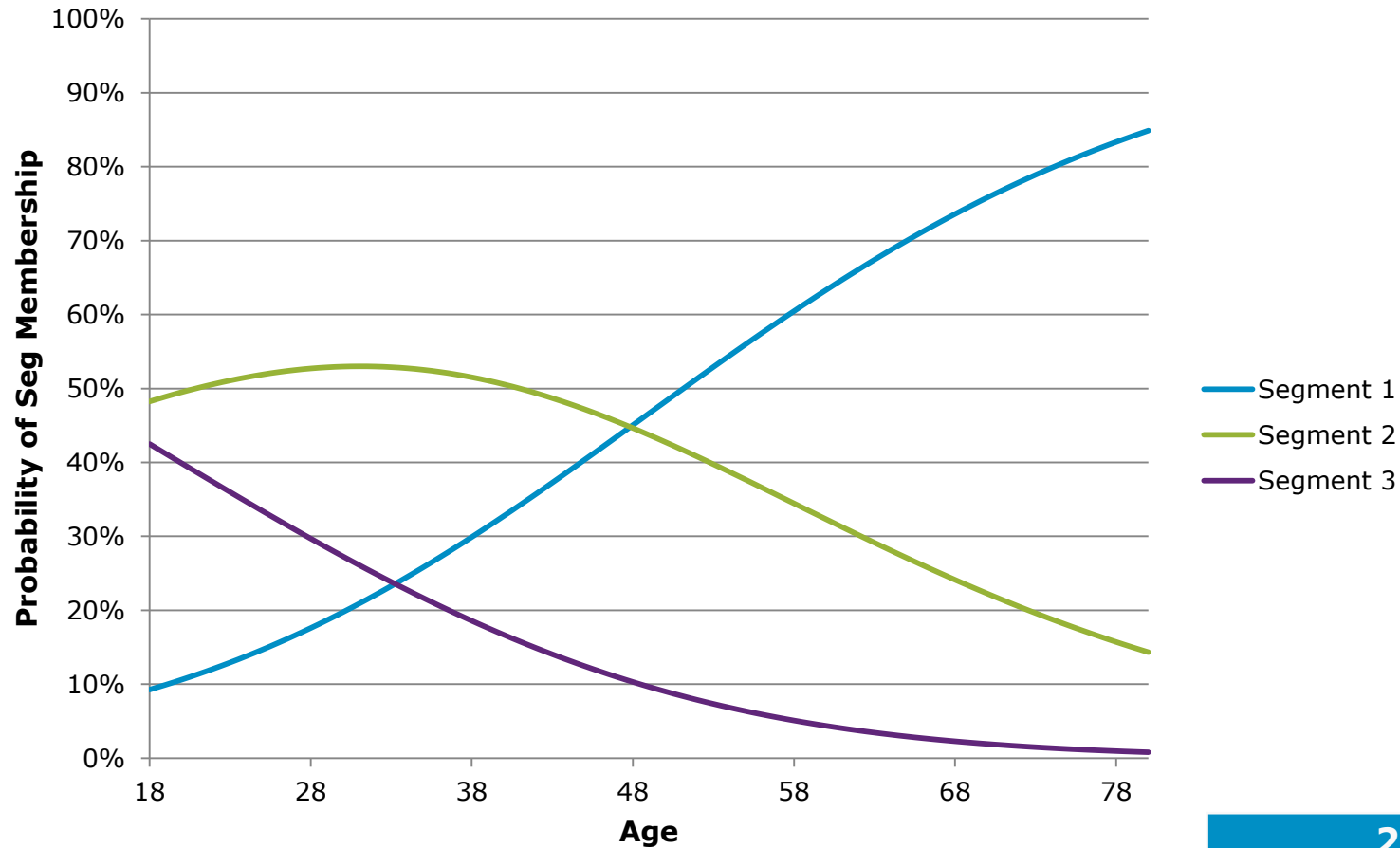
Female Segment Membership



28 Year-Old (ABC1, with children)	
Segment	Membership Probability
1	45%
2	33%
3	22%



Male Segment Membership



28 Year-Old (ABC1, with children)	
Segment	Membership Probability
1	18%
2	53%
3	30%



Segment Demographic Characteristics

	Total	Segment		
		3	2	1
<i>Base:</i>	1,061	610	316	118
	%	%	%	%
Gender				
Male	51	40	69	62
Female	49	60	31	38
Age				
-34yrs	31	23	37	57
35+yrs	69	77	63	43
Social Class				
ABC1	43	40	51	43
C2DE	48	51	41	51
F	9	9	9	6

What Can Be Done?

- Using the model, we can identify those groups with a high chance of engaging in errant behaviour (e.g. **young males**), but how do we target these groups to improve their behaviour?
- Changing age and gender are not an option, so are there any other variables that differentiate the segments?
- We looked at questions relating to awareness of driver/safety facts.
- There were some significant differences, particularly between Segment 3 (worst offenders) and Segment 1 and 2.

What Can Be Done?

- **9 Awareness questions**

Question Type	Question Summary	Q
Speeding*	Save <1min by driving 70kph instead of 65kph on a 10km journey	Q6d
Pedestrian Survival	Pedestrians have a 90/<50% chance of survival when struck by a car travelling <30/45kph	Q7e
Safety Camera Check	On a long distance journey, how likely do you think it would be that you would encounter a speed check	Q9a
Safety Camera Location	Awareness that safety cameras are placed in locations where speeding contributed to a collision	Q9f
Seat Belt Points	Awareness of points increase for not wearing seatbelt	Q10a
Alcohol Awareness*	How much alcohol can you drink and still remain under the legal limit?	Q13d
Mobile Phone*	Likelihood of getting caught using a mobile	Q15f
Mobile Phone	Awareness of points increase for mobile phone usage	Q15h
Bank Holiday Check*	Awareness of increase in Garda checks during bank holidays	Q18a

* Indicates a significant difference between segments

Segment Awareness Characteristics

Awareness	Segment 1 (61.0%)	Segment 2 (31.6%)	Segment 3 (11.8%)	Total (100%)
Alcohol Awareness	7%	10%	15%	9%
Speeding	38%	40%	57%	41%
Bank Holiday Check	20%	16%	27%	20%
Mobile Phone	47%	50%	53%	49%

- **Alcohol Awareness** is the % that believe they can have >1 drink and drive legally.
- **Speeding** is the % 'Surprised' that little time is saved by speeding.
- **Bank Holiday Check** is the % unaware that there may be increased Garda Checks on Bank Holidays.
- **Mobile Phone** is the % who believe that being checked is 'Unlikely'.

What Can Be Done?

Segment 3 (worst offenders) respondents were significantly **more likely to believe** that:

- *You can drink more than one drink and be under the legal limit*
- *Getting caught using mobile phone by Guards is unlikely*

They were also **less aware** that

- *You save relatively little time by speeding*
- *There may be increased Garda checks during bank holidays*

There was no significant difference in awareness between Segment 1 & 2 respondents.

What Can Be Done?

To assess the impact of improving awareness, we predicted segment membership for respondents who have different levels of awareness. Specifically, two groups were examined.

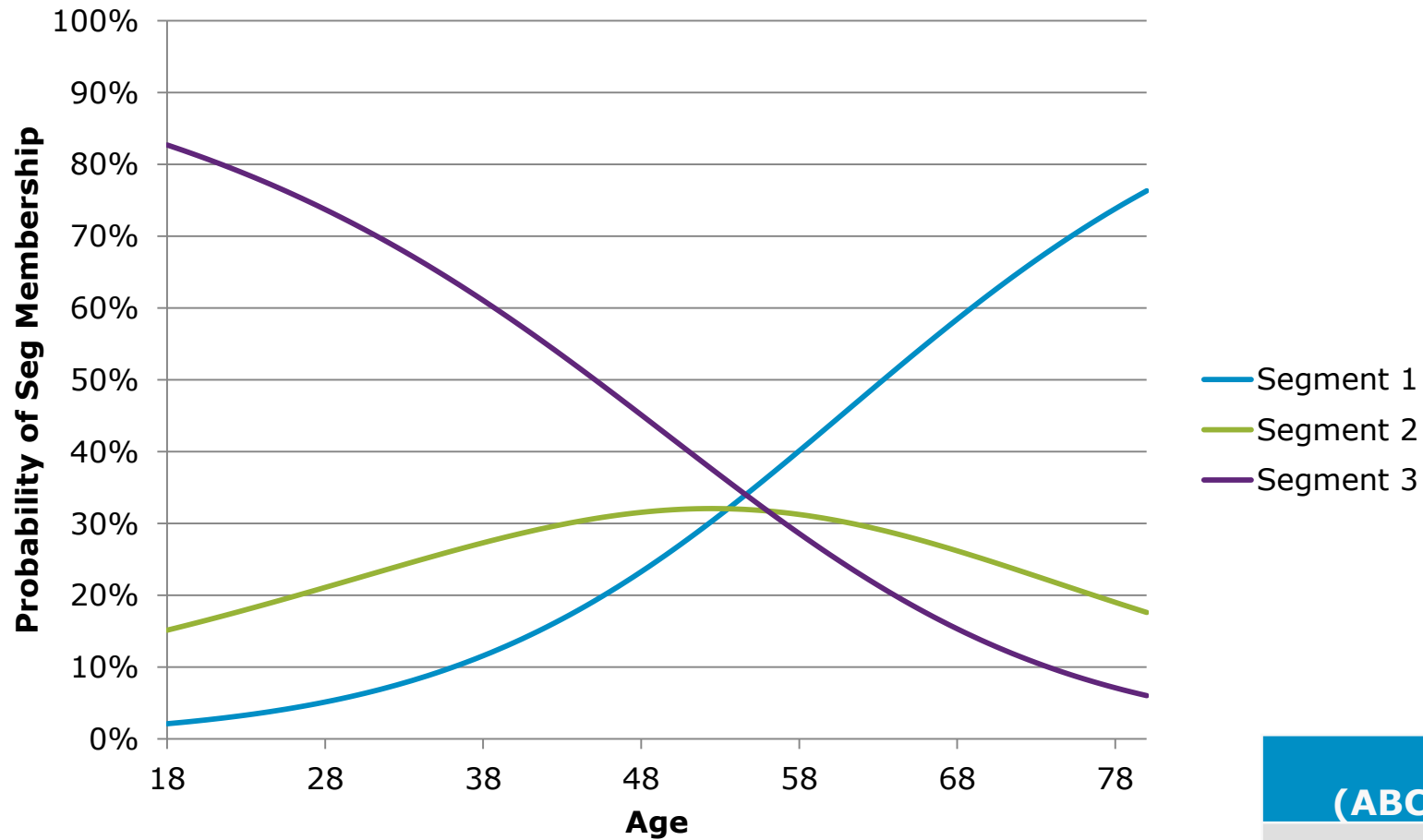
Low Awareness Group

- *Do believe they can have more than one drink and legally drive.*
- *Are surprised that you save relatively little time by speeding.*
- *Are not aware that there may be increased Garda checks during bank holidays.*
- *Believe that getting caught using a mobile phone is unlikely.*

High Awareness Group

- *Don't believe they can have more than one drink and legally drive.*
- *Are not surprised that you save relatively little time by speeding.*
- *Are aware that there may be increased Garda checks during bank holidays.*
- *Believe that getting caught using a mobile phone is likely.*

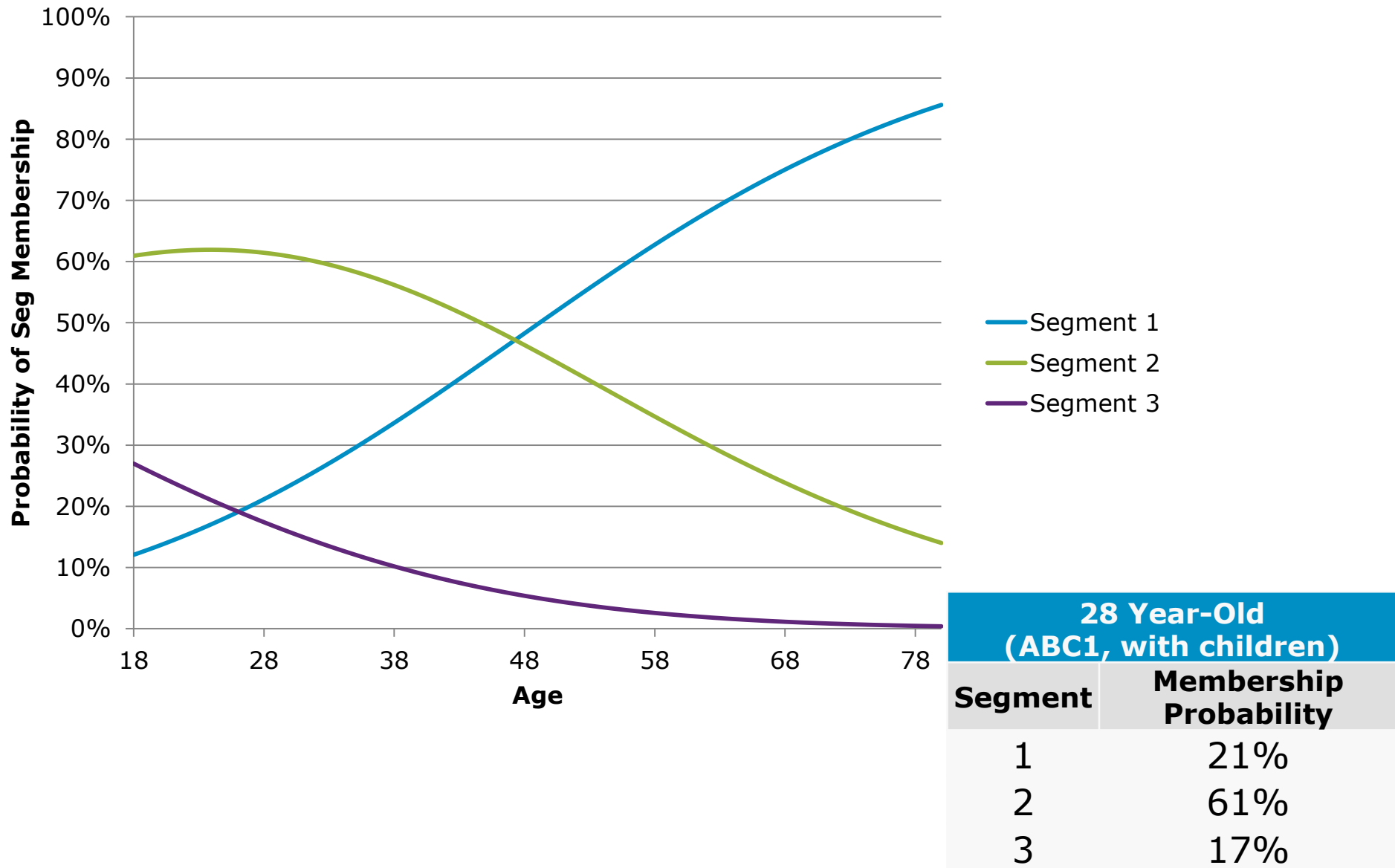
Male Segment Membership: Low Awareness



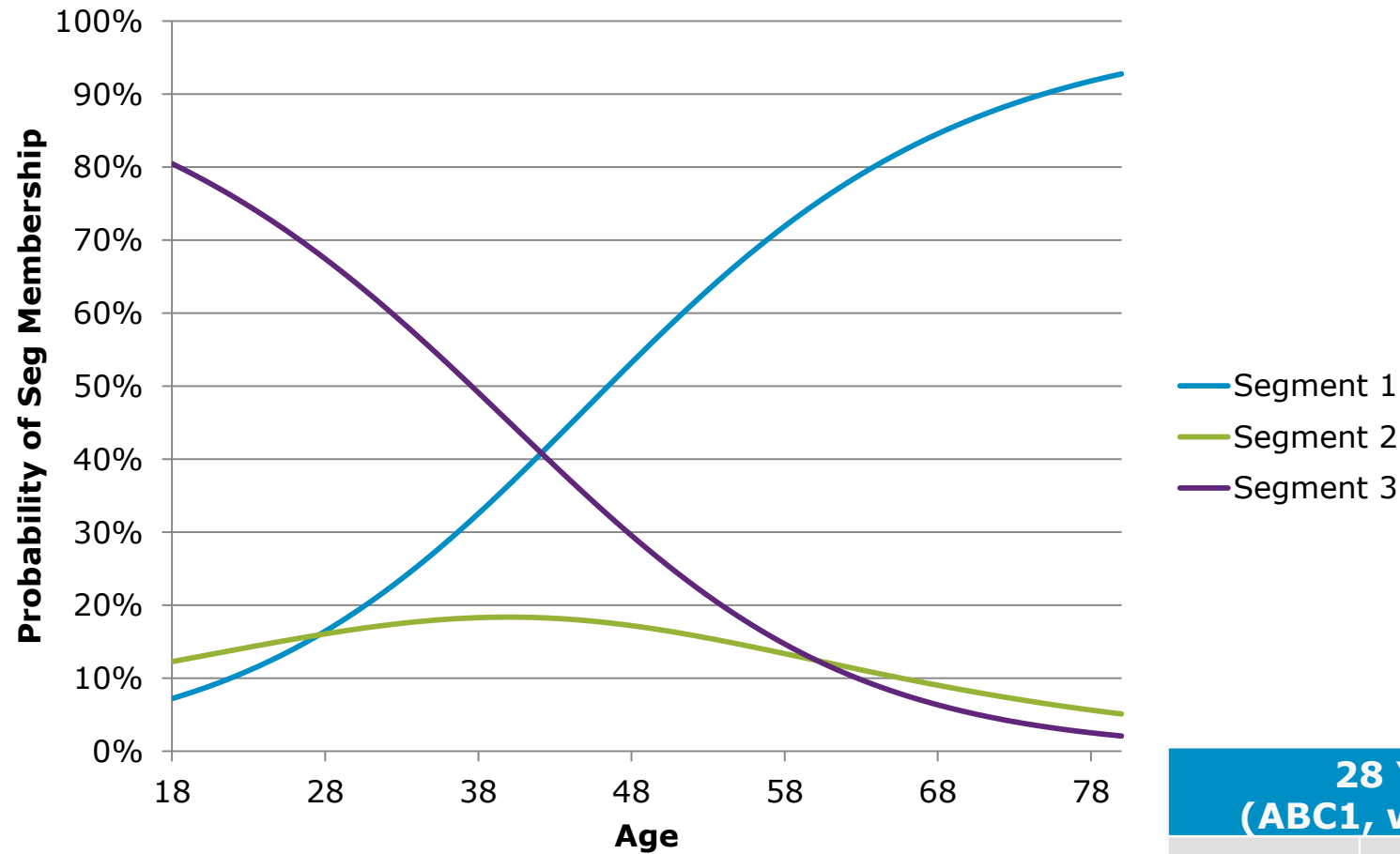
28 Year-Old (ABC1, with children)	
Segment	Membership Probability
1	5%
2	21%
3	74%



Male Segment Membership: High Awareness



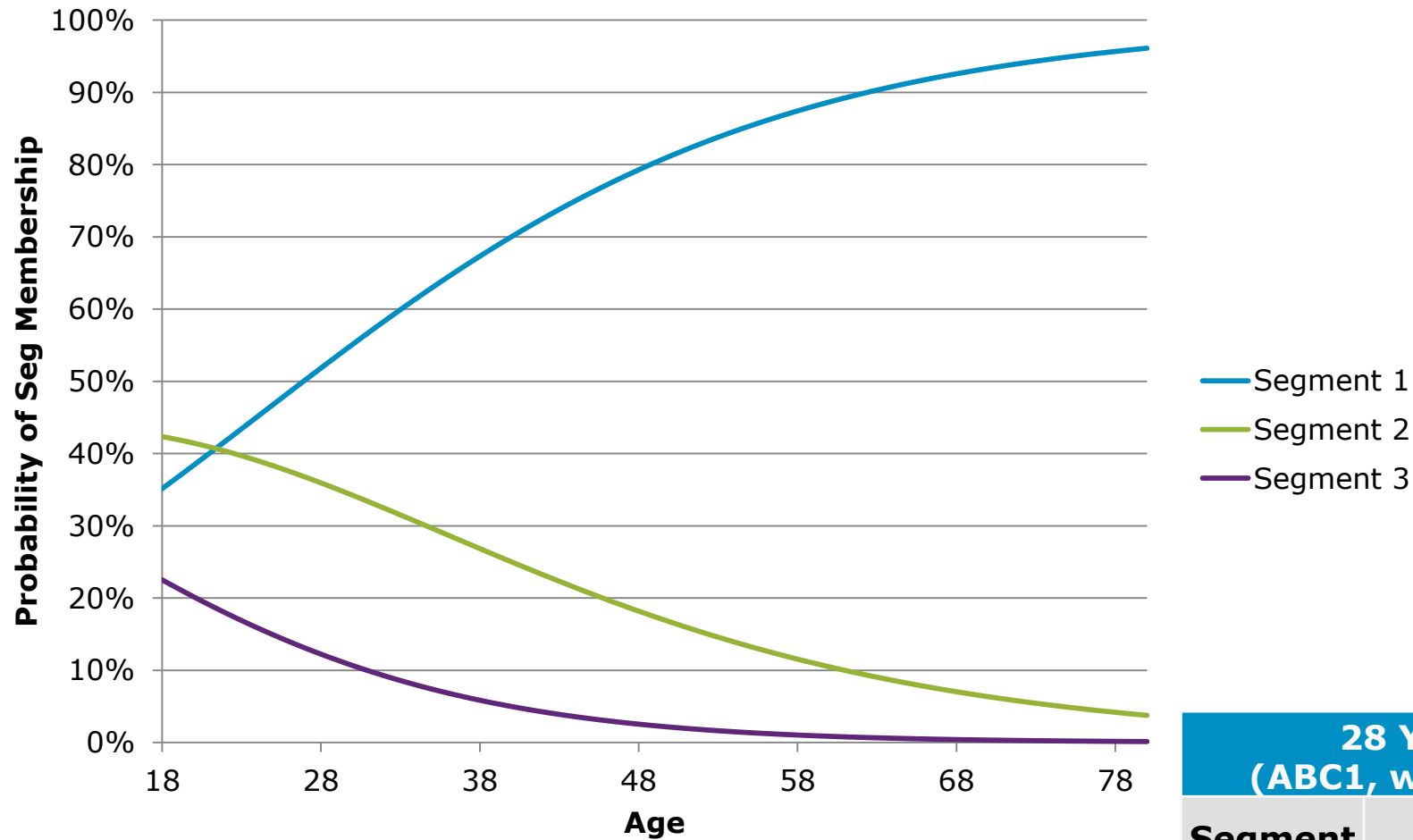
Female Segment Membership: Low Awareness



28 Year-Old (ABC1, with children)	
Segment	Membership Probability
1	16%
2	16%
3	67%



Female Segment Membership: High Awareness



28 Year-Old (ABC1, with children)	
Segment	Membership Probability
1	52%
2	36%
3	12%



What Can Be Done?

- These findings suggest that **improving awareness of key issues** relating to speeding and mobile phone use may help to reduce the number of motorists in the most dangerous category (Segment 3).
- Some caution should be used as causality has not been established; i.e. are these just 'careless' types who pay little attention, or will improvements in awareness work?

Summary

- We segmented drivers into **three groups**, based on reported behaviour.
- These segments are broadly defined by **increasingly poor** driver behaviour.
- Segments differed significantly on demographics, with **age** and **gender** being the most important characteristics.
- **Younger male drivers are** the most likely to engage in forms of errant behaviour.
- Female drivers also have a significant chance of engaging in errant behaviour.
- Those in the worst group were more likely to overestimate the **benefits of speeding** and their **capacity to drink and drive legally**.
- They also tended to underestimate the chances of getting caught using their mobile phones.
- **Improvements in awareness** of these factors may reduce the proportion of motorists in the worst-offending segment.

Key Conclusions



Key Conclusions

Speeding and Rule Violation

- Close to 1 in 5 motorists could be described as high speeding and rule violators, with this group demographically over indexing significantly amongst younger males, and indeed ABC1s.
- More generally, there is broad acceptance of low level speeding among Irish motorists with, for example, over 40% of Irish motorists considering it broadly acceptable to exceed the 100km speed limit by less than 10km.
- In terms of sharing the road, motorists are consistently negative on the behaviour of pedestrians, with this negative sentiment peaking among urban drivers.
 - ❖ Over 3 in 4 motorists agree strongly that pedestrians are often distracted by using mobile phones.
- Ironically, urban motorists are particularly unlikely themselves to wear reflective gear as pedestrians.

Key Conclusions

Safety Cameras

- 1 in 3 motorists can be described as safety camera Manipulators: they have driven more slowly at camera sites only. Manipulators are much more likely to be young males who drive for work. Support for and attitudes towards safety cameras is very strongly related to compliance, with Manipulators and Defiers being much more cynical and negative about the impact of safety cameras.

Child Safety

- Approximately 1 in 10 relevant parents do not always use appropriate restraints for children in their car, with non observance more likely in relation to children above 4 years.
- While 70% of motorists with children have fitted their car seat themselves, just 40% have had the appropriate series of car seat checks undertaken by an expert from a retail outlet.
- In addition, 19% of parents use their car seat in another car, with multiple car usage being much stronger in urban areas. Clearly there is a demonstrable need for the RSA 'Check Fits' service, but only 1 in 5 relevant motorists are currently aware of this service.

Key Conclusions

Motorcyclists

- Less than 1 in 2 motorcyclists consider it their main form of transport and 'part time' motorcyclists are much more likely to be on the road in the warmer months. Over 40% of motorcyclists undergo some form of additional training after purchasing a motorcycle, but this does appear to decline with older/repeat purchasers.

Alcohol

- Over 1 in 10 motorists (284,000 population estimate) consumed alcohol before driving in past 12 months. The incidence of alcohol consumption is much higher among those who drive for work; those who have had a collision/near miss in recent years; and high speeding and rule violators.
- Irish motorists' perspective on how much alcohol they can consume and be safe to drive is directly correlated to their general relationship with alcohol (whether drink frequently or not). The results also suggest a strong correlation between drink driving and speeding.

Key Conclusions

Mobile Phones

- 42% of Irish motorists are active at least sometimes with their mobile phone while driving. If we exclude talking on a handsfree mobile phone, there are over 400,000 motorists who talk on a handheld mobile, or text or check apps while driving. This second group of drivers are also much more likely to consider mobile phone use in car generally acceptable.
- Less than half of all motorists consider it likely that mobile phone use in car will be caught by the police.
- More positively, the recent penalty points initiative clearly had a positive impact on in car mobile behaviours; suggesting further efforts to raise awareness of the rise in penalty points would be beneficial.

Key Conclusions

Car Checks & Servicing

- The majority of motorists consider themselves able to conduct a key series of car checks. However, this knowledge varies considerably by gender. Separately, there is a consistently high incidence of car servicing issues among Irish motorists, with 16% claiming that a pre-NCT service failed to address an issue that was subsequently picked up in the test.

Motorist Segmentation

- The Segmentation Analysis confirms that younger male drivers are the most likely to engage in forms of errant behaviour on the road. Those in the worst offending group were more likely to overestimate the benefits of speeding and their capacity to drink and drive legally. They also tended to underestimate the chances of getting caught using their mobile phones. An awareness raising initiative of key road safety issues may reduce the proportion of motorists in this worst-offending segment.

Thank You



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