



Údaras Um Shábháilteacht Ar Bhóithre
Road Safety Authority

The Road Safety Authority

Driver Attitudes & Behaviour Survey 2020

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RESEARCH
& INSIGHT



Driver Attitudes & Behaviour Survey 2020



Research Background & Objectives



Travel Patterns post Covid



Speeding



Seatbelts



Alcohol



Mobile behaviour



Learner Drivers



The results indicate that in the year of COVID-19, attitudes of motorists to errant road behaviour have become more permissive, especially in relation to speeding:

The majority of motorists now admit to low level speeding.

The perceived acceptability of speeding has significantly increased.

Strong support for the use of safety cameras has declined by 16%.

The percentage of motorists with a 'no alcohol limit' before driving is down 10%.

However, positive developments in sentiment are also apparent:

The incidence of motorists taking preventative safety measures with their mobile phones has significantly increased.

There are indications of growing support for each of the proposed learner driver restrictions.

The survey results also highlight the huge change in travel patterns in the past 12 months.



Research Background & Objectives

Driver Attitudes & Behaviour Survey

Survey Methodology



- The National Survey of Driver Attitudes & Behaviour is a cornerstone of the Road Safety Authority research programme. It establishes the incidence of errant driving behaviour and habits among Irish motorists and determines their attitudes to a series of road safety measures; and analyses the extent to which these attitudes and behaviours are consistent both across demographic criteria and over time.
- The 2020 research builds off the findings from previous research.
- **Nationally representative sample of 1,200 motorists ages 17+:**
 - Quota controlled in terms of gender, age, region and area.
 - Fieldwork was conducted in November/December 2020.

This survey was switched to an online approach due Covid 19 related public health restrictions. To support comparisons with the research series to date (conducted via face to face interviews) the national sample of interviews was increased to 1,200.

Sample Profile

Base: All Motorists N – 1,241



		%
Gender	Male	51
	Female	49
Age	-24 years	7
	25-34 years	20
	35-44 years	24
	45-54 years	19
	55-64 years	15
	65+ years	15
Social Class	ABC1F	52
	C2DE	48

		%
Region	Dublin	27
	Leinster	29
	Munster	25
	Conn/Ulster	19
Area	Urban	60
	Rural	40

Sample Profile

Base: All Motorists N – 1,241



		%
Vehicle Type	Motorcycle	4
	Car	98
	Van	5
	P.S.V. (minibus)	0*
	P.S.V. (bus)	0*
	Truck	0*
	Learner licence	8
Licence Type	Full licence – Irish issued	87
	Full licence – other country issued	5

		%
Length of Time Driving	Under 2 years	8
	2-5 years	9
	6-10 years	9
	11-20 years	25
	21-30 years	19
	31+ years	27
Drive for work**	Yes	22
	No	78

*=less than 0.5%

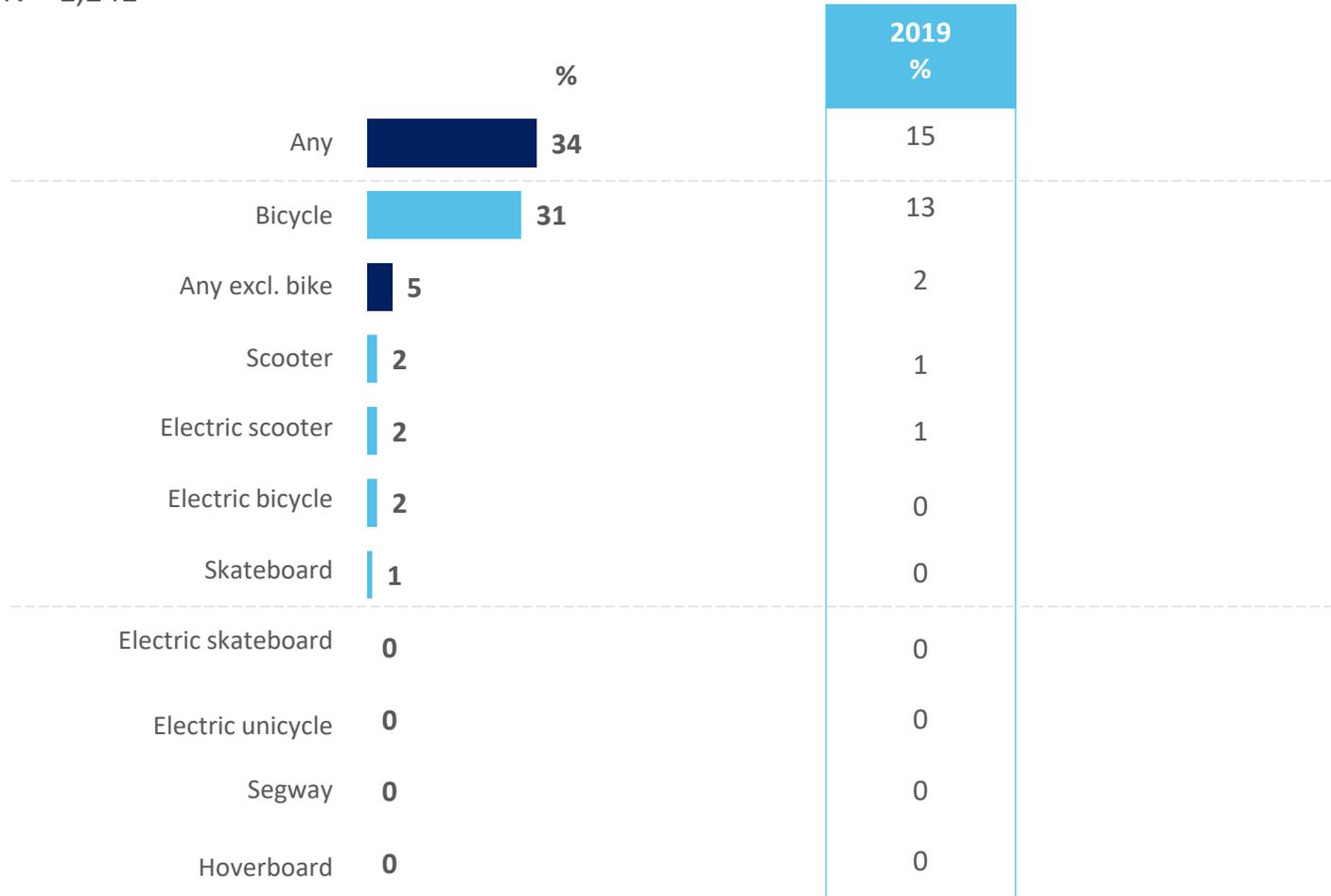
** 33% of all employed motorists



Travel Patterns Post Covid

Use of the roads by means other than a car

Base: All motorists N – 1,241



Significant rise ‘ in past 12 months’ use of bicycles (by motorists).

Q. In the past twelve months, have you used any of the following on a public road, footpath or cycle lane in Ireland?

Use of the roads by means other than a car

Base: All motorists N – 1,241

	Total	Age		Region	
		-34yrs	35+yrs	Dublin	Ex Dublin
	1241	390	851	345	896
	%	%	%	%	%
Any	34	43	31	48	29
Any exc bike	5	13	2	8	4
Bicycle	31	36	29	44	26
Scooter	2	4	1	3	1
Electric scooter	2	5	1	3	2
Electric bicycle	2	3	1	2	1
Skateboard	1	4	0	1	1
Electric skateboard	0	1	-	1	0
Electric unicycle	0	0	-	-	0
Segway	0	1	0	1	0
Hoverboard	0	1	0	1	-
I have not used any of these	66	57	69	52	71

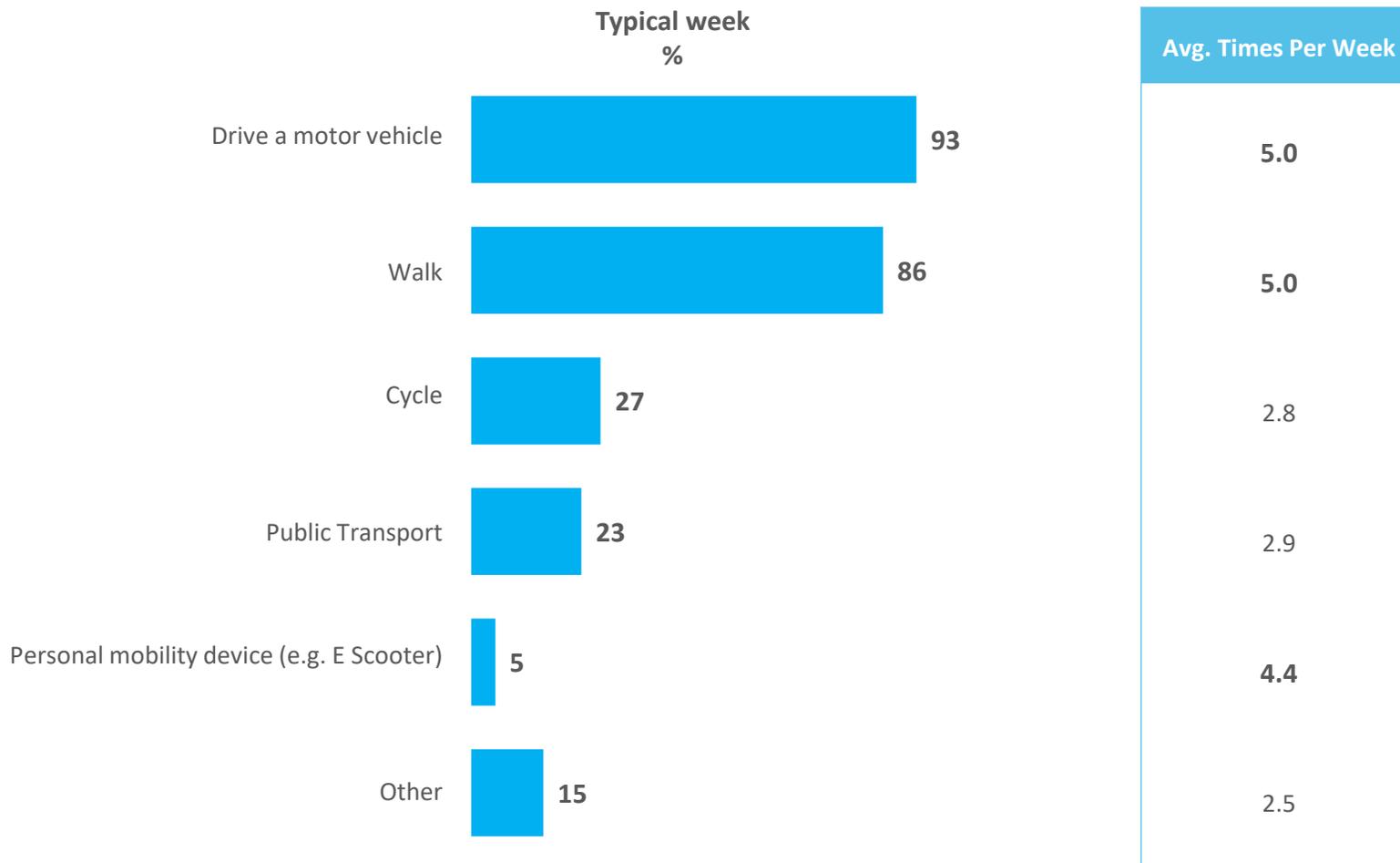
Use of niche modes much stronger among younger motorists, rising to 13% of those under 35 years.

Q.13a In the past twelve months, have you used any of the following on a public road, footpath or cycle lane in Ireland?

Travel Patterns since Covid 19:

Frequency of use (Weekly+)

Base: All motorists N – 1,241



Beyond driving and walking, high frequency usage also apparent for personal mobility devices.

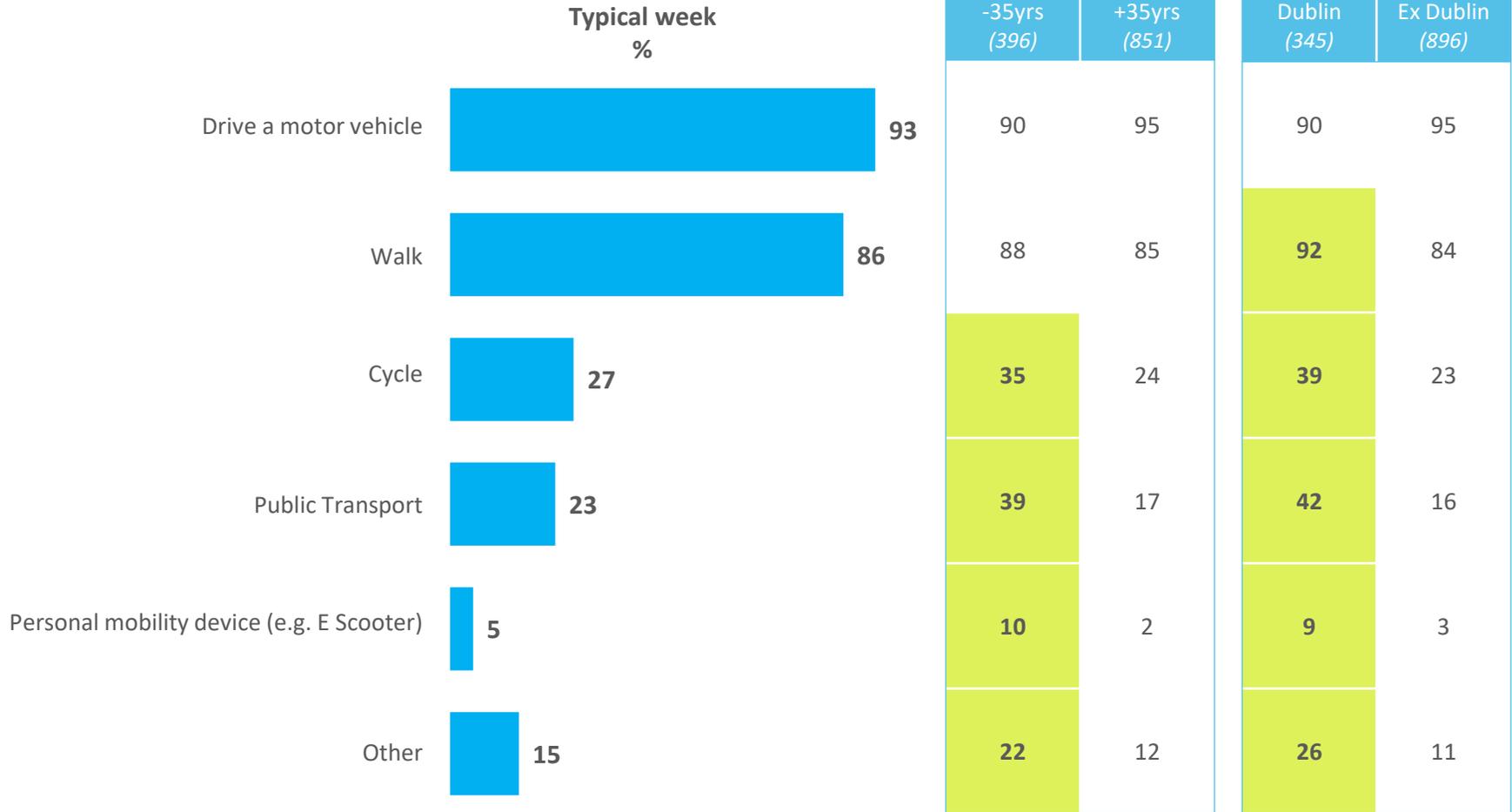


Given current circumstances, in a typical week how often do you..?

Travel Patterns since Covid 19:

Frequency of use (Weekly+)

Base: All motorists N – 1,241



Travel patterns vary considerably by age & region, most pronounced in relation to public transport and personal mobility devices.



Given current circumstances, in a typical week how often do you..?

Travel Patterns: Compared to Pre - Covid 19

Base: Ever use each mode

	More often %	Less often %	Stopped %	About the same %
Drive a motor vehicle <i>(100%)</i>	15	39	3	42
Cycle <i>(42%)</i>	24	21	5	50
Personal mobility device (e.g. E Scooter) <i>(12%)</i>	8	17	8	67
Walk <i>(90%)</i>	49	10	2	39
Public Transport <i>(58%)</i>	5	38	34	21
Other <i>(46%)</i>	4	35	35	26

Declines in use post Covid peak for motor vehicles & public transport.



QB Thinking of all possible transport modes, to what extent has there been a change in your use of each of these transport modes now, compared to pre-covid 19?

Travel Patterns: Compared to Pre - Covid 19

Base: Ever use each made

	More often %
Drive a motor vehicle <i>(100%)</i>	15
Cycle <i>(42%)</i>	24
Personal mobility device (e.g. E Scooter) <i>(12%)</i>	8
Walk <i>(90%)</i>	49
Public Transport <i>(58%)</i>	5
Other <i>(46%)</i>	4

Age	
-35yrs (396)	+35yrs (851)
26	12
29	23
11	0
57	46
7	4
7	2

Region	
Dublin (345)	Ex Dublin (896)
25	12
32	21
13	0
57	45
6	4
6	2

Any increases in frequency more apparent among younger & Dublin based motorists.



QB Thinking of all possible transport modes, to what extent has there been a change in your use of each of these transport modes now, compared to pre-covid 19?

Reasons for changes to travel patterns since Covid

Base: motorists using any mode 'more often' / 'less often' / 'stopped' N – 1,012

	Total	Age		Region	
		-34yrs	35+yrs	Dublin	Ex Dublin
	1013	346	667	318	695
	%	%	%	%	%
Current Covid19 guidelines and/or restrictions	72	62	77	73	72
Change in place of work/education	21	31	17	26	19
More leisure time	17	18	17	13	19
Change in employment status	11	16	9	15	9
Change in address	6	14	2	6	6
Other	6	7	6	5	7

Younger motorists much more likely to indicate reasons relating to change in work, education & address.



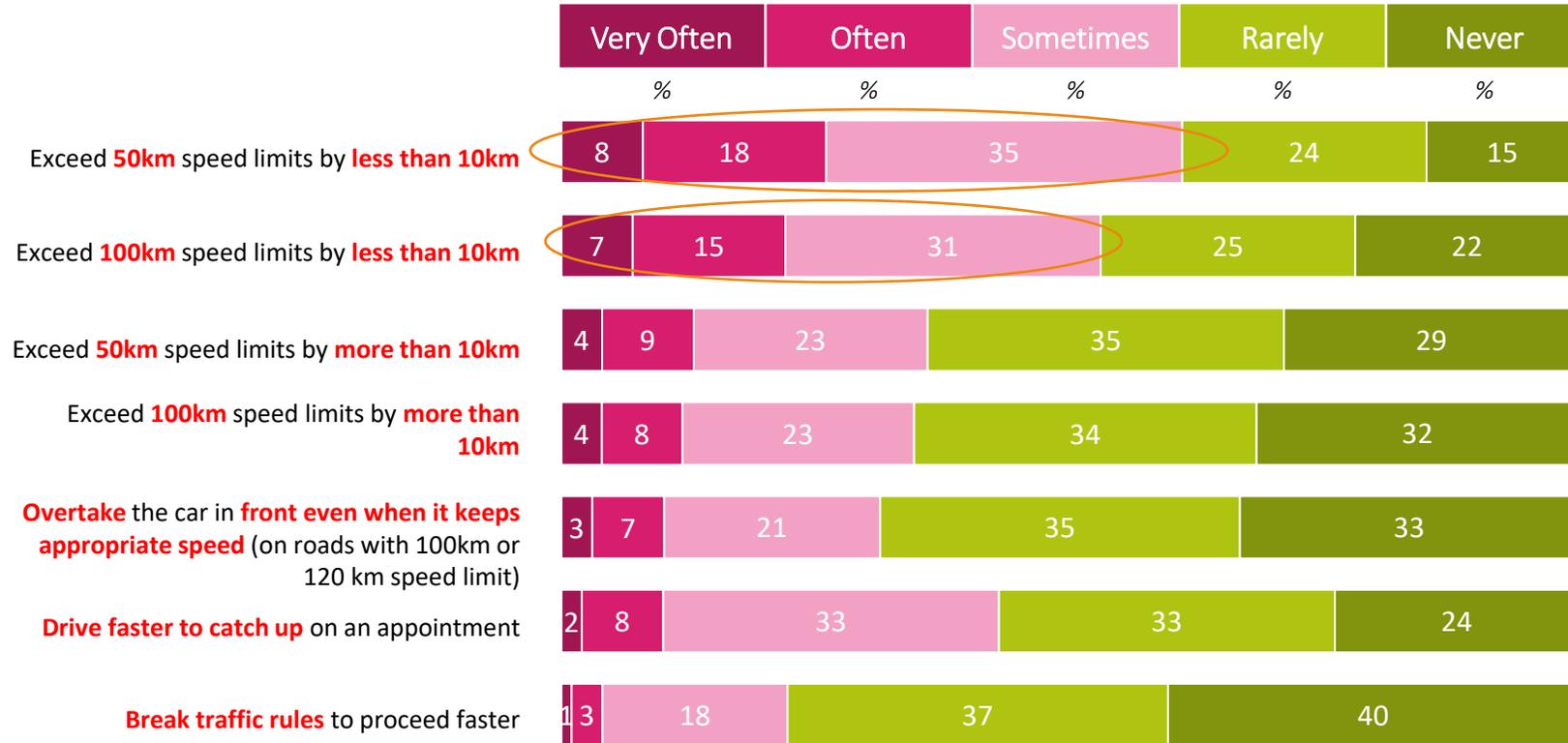
Q.16 Are the changes in your travel patterns due to any of the following:



Speeding

Speeding & Rule Violation: Behaviour

Base: All Motorists N- 1,241



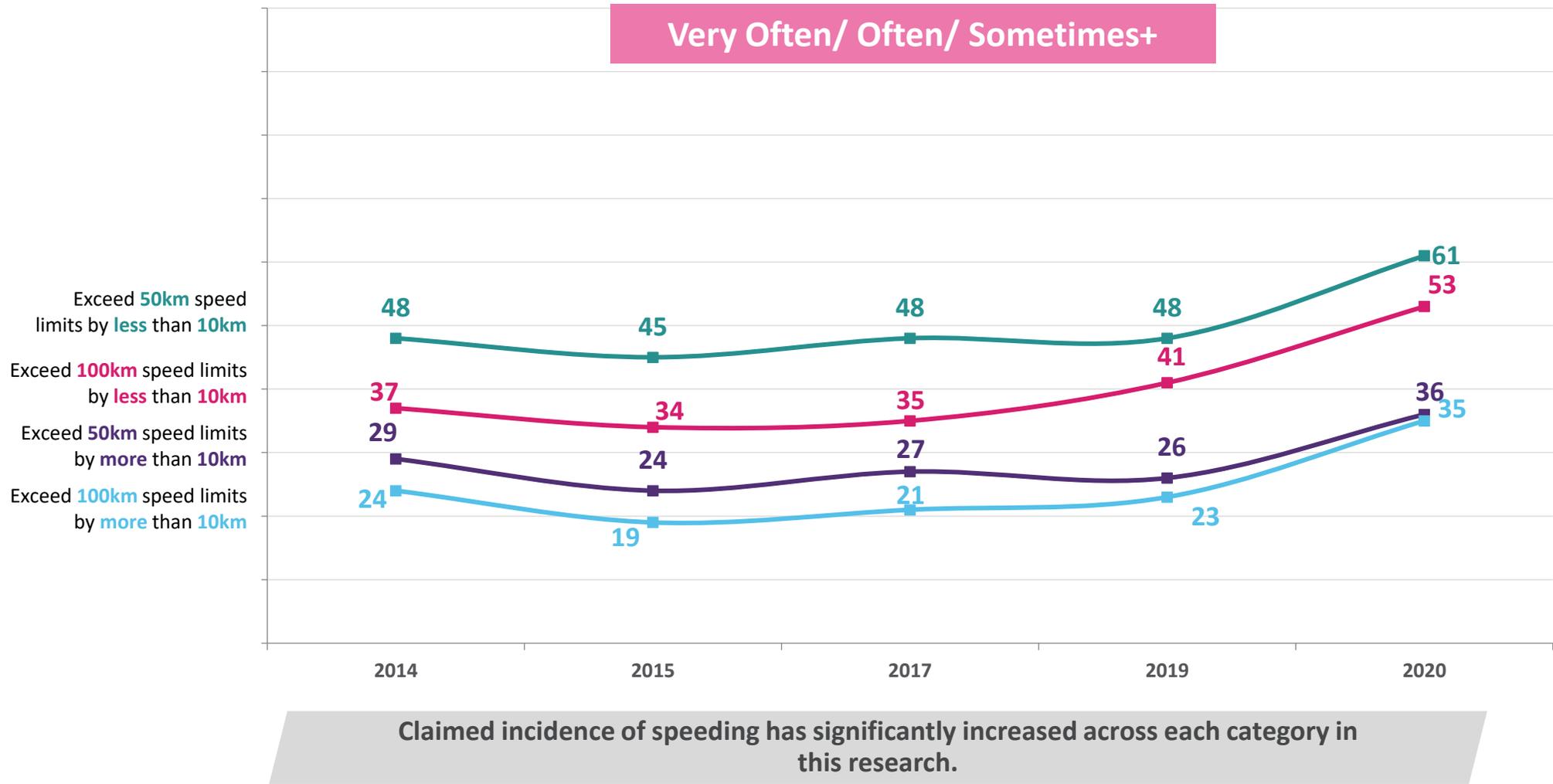
The majority of motorists now admit to low level speeding; 61% with 50km speed limits, and 53% with 100km limits.



Q.5a How often do you...

Speeding & Rule Violation: 2014-2020

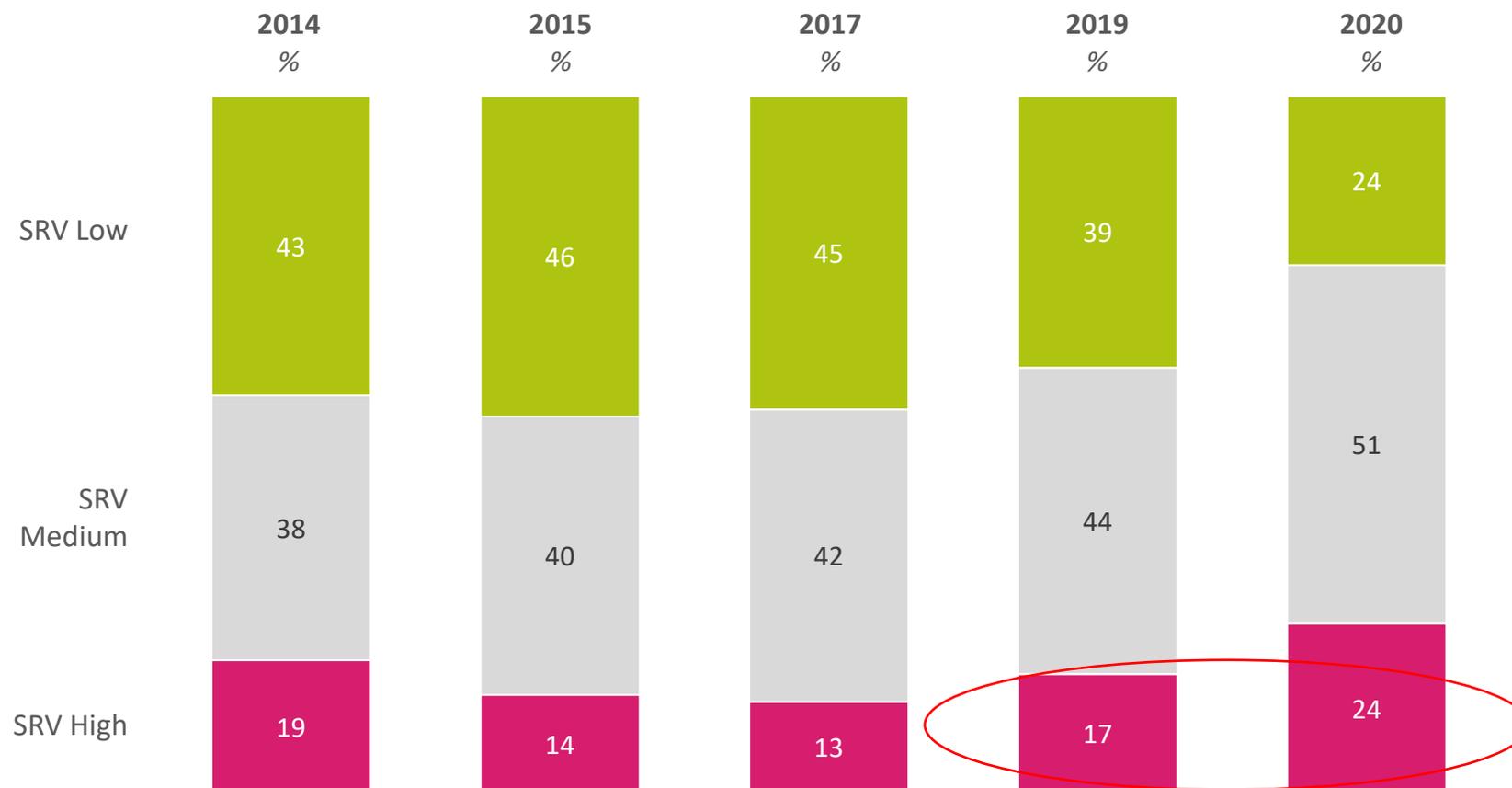
Base: All Motorists N- 1,241



Q.5a How often do you...

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

Base: All Motorists



The SRV High group has risen to 24% of motorists – easily the highest level to date for this group in the research series. Only 1 in 4 motorists (24%) qualify for the most law abiding ‘low’ group.

Speeding & Rule Violation: Composite Score

Base: All Motorists N-1,241

	Total	Gender		Age					Social Class		Region				Area	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
<i>Base:</i>	1241	603	638	107	283	391	289	171	695	546	345	324	333	239	846	395
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
SRV Low	24	18	31	37	24	18	22	34	21	28	27	25	24	21	25	24
SRV Medium	51	54	48	43	47	51	59	50	49	53	49	51	54	52	51	52
SRV High	24	28	21	20	29	31	19	16	30	18	24	24	23	27	25	24

The SRV High Group peaks among the middle age and middle-class groups.



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

What Level of Speeding is Acceptable?



Base: All Motorists N-1,241

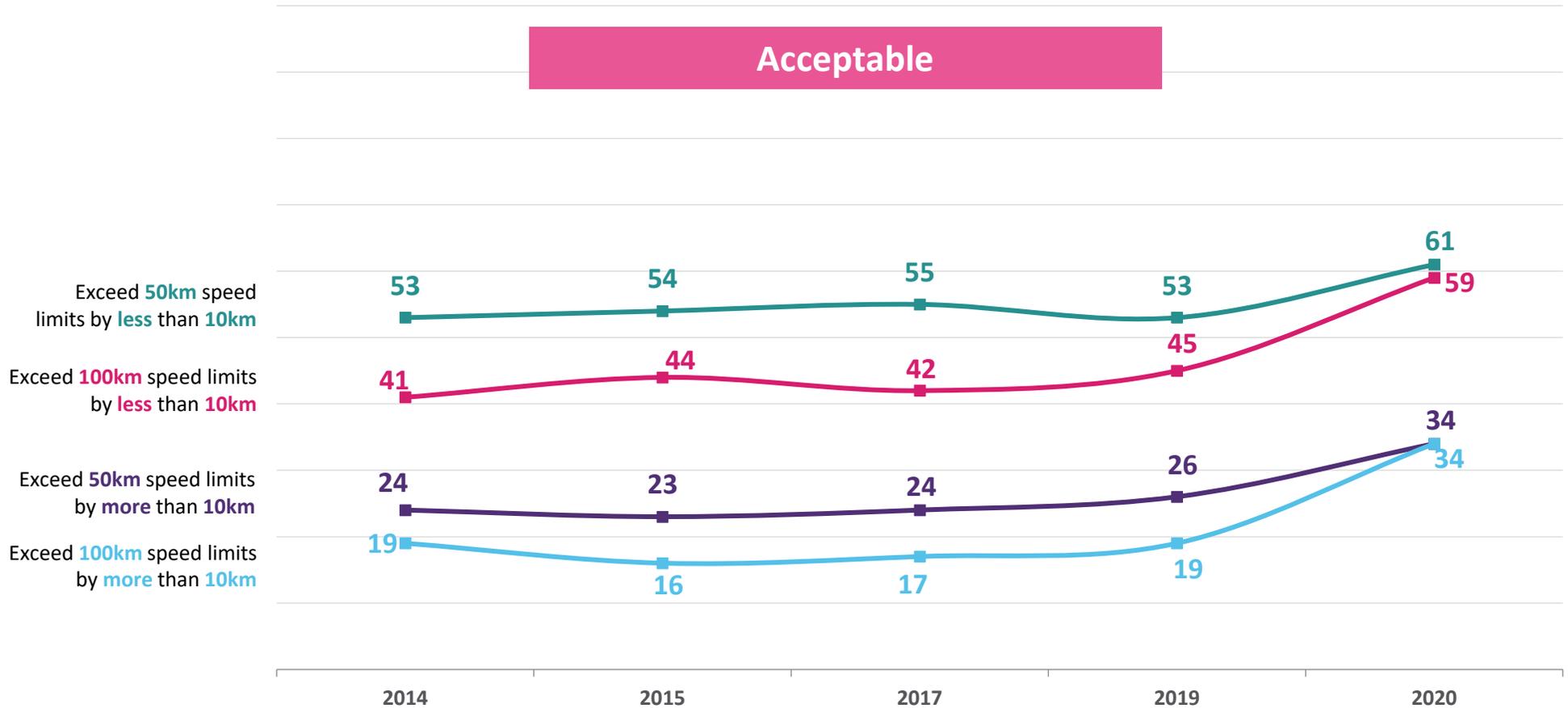


34% of motorists now consider high level speeding acceptable at either 50km or 100km speed limits, (rising to 51% and 54% of the SRV high group).

Q.5b I would like you to tell me how acceptable or unacceptable you think it is for drivers to ...

What Level of Speeding is Acceptable?

Base: All Motorists N-1,241



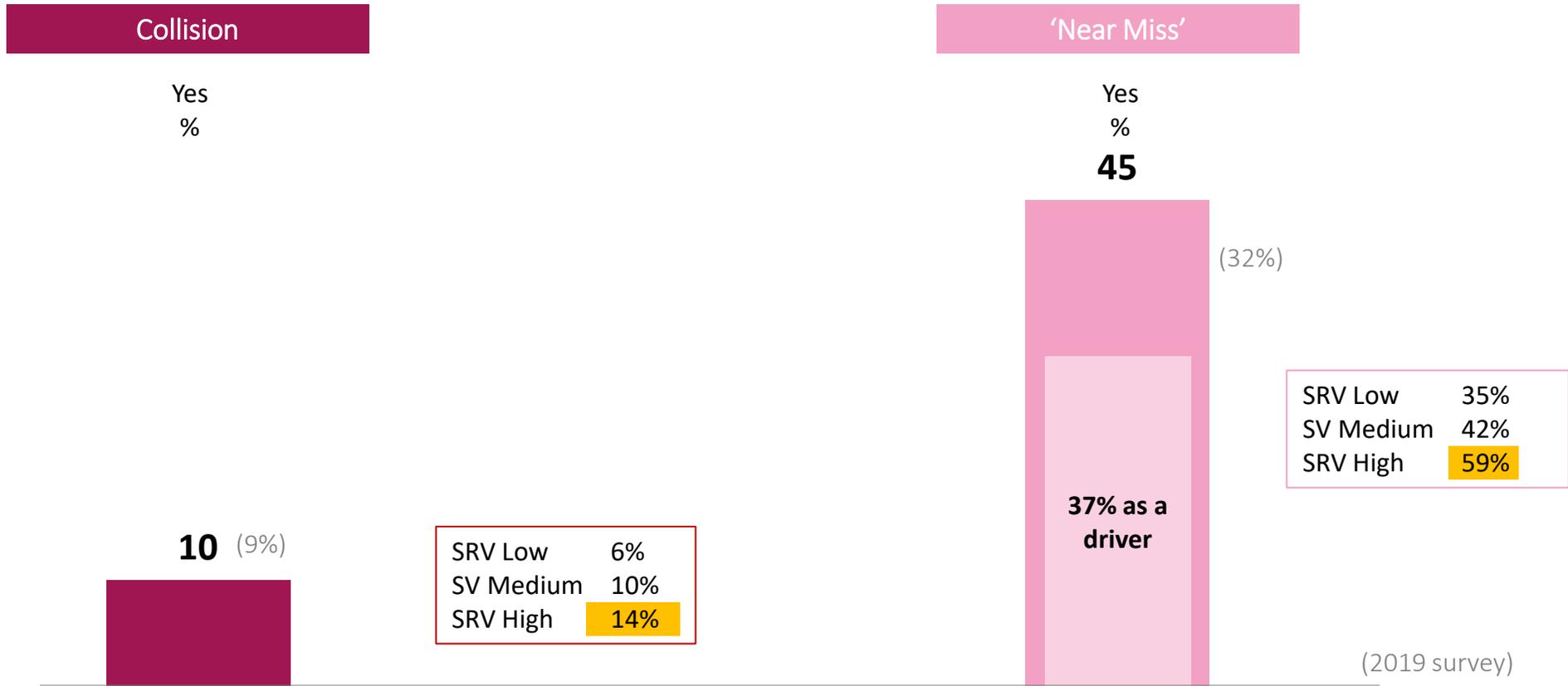
The perceived acceptability of speeding has significantly increased during Covid 19 across each of the categories.

Q.5b I would like you to tell me how acceptable or unacceptable you think it is for drivers to ...

(2017/15/14 Research)

Collisions & Near Accidents (Past 5 Years)

Base: All Motorists N-1,241



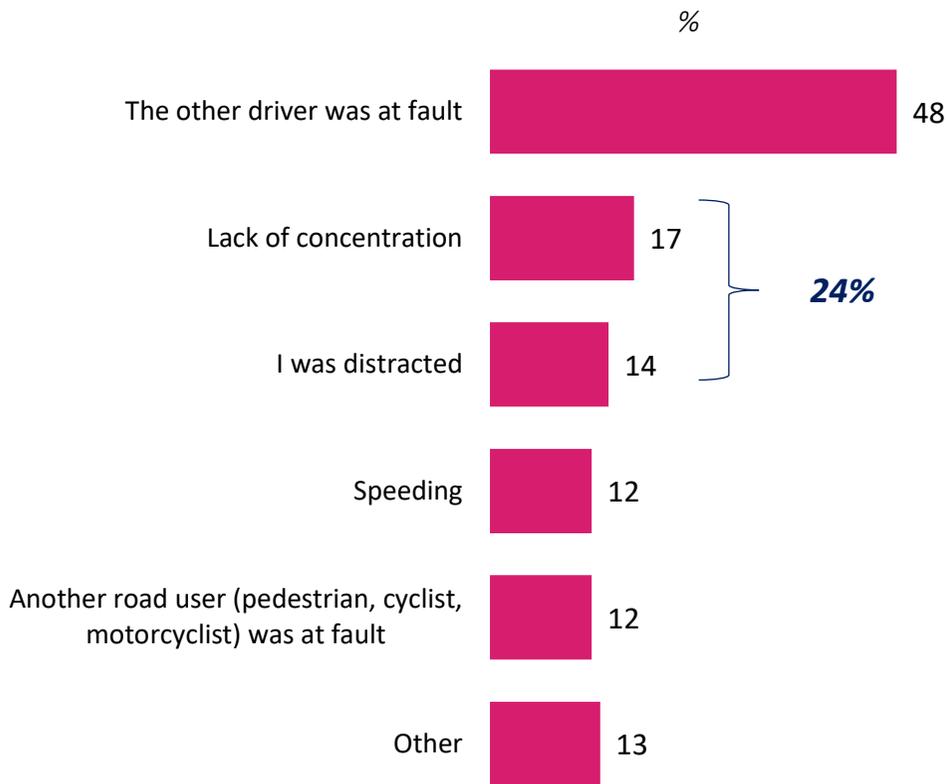
10% of motorists have had a collision in the past 5 years and 45% a 'near miss'.



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?

Reason for Collision

Base: Involved in a collision past 5 years N - 125



	2019	2017	2015	2014
%	%	%	%	%
The other driver was at fault	51	55	51	58
Lack of concentration	17	20	19	22
I was distracted	15	5	18	15
Speeding	2	1	4	3
Another road user (pedestrian, cyclist, motorcyclist) was at fault	7	11	N/A	N/A
Other	12	9	9	6

24% of motorists reference 'lack of concentration/distraction' as reasons for their collision. (25% in 2019). Speeding as a reason for collisions has risen sharply in this survey.

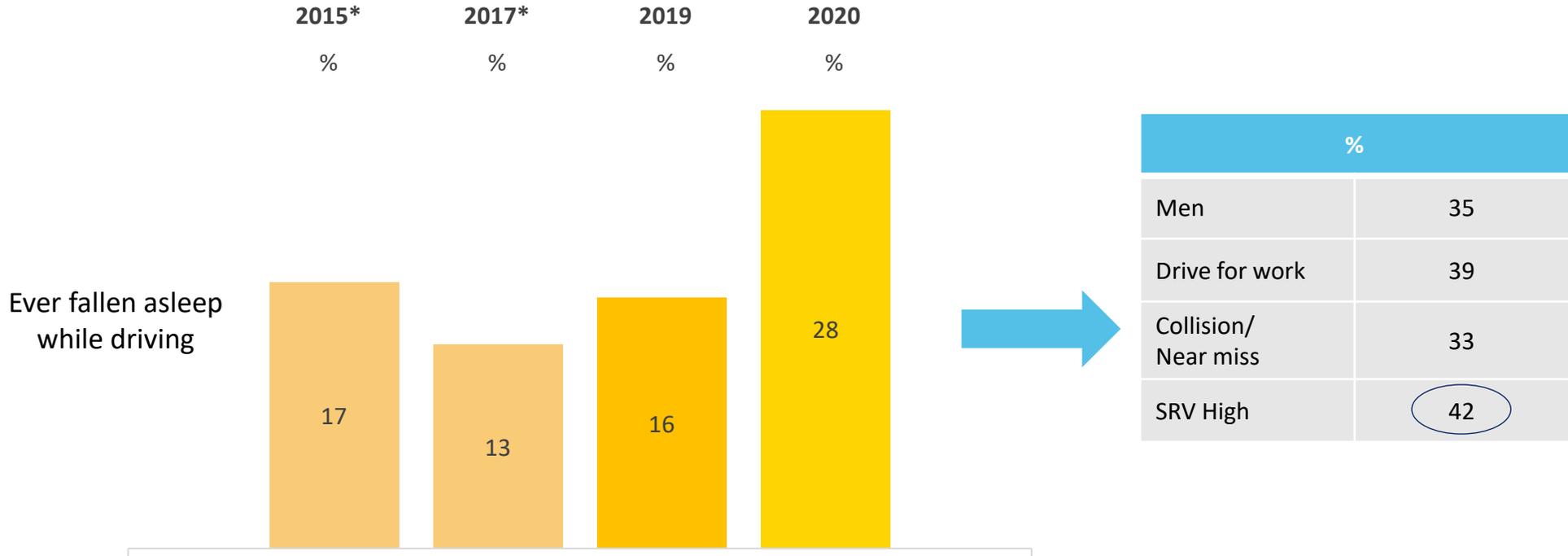


Q. Were any of these collisions the result of you doing any of these things?

All others 1% or less

Driving fatigue

Base: All Motorists N-1,241



28% of motorists now indicate they have fallen asleep or nodded off/ even if only for a brief moment when driving. – peaks among 42% of SRV high groups.

Q.4a Have you ever fallen asleep or nodded off (even if for only a brief moment) while driving?

Support for safety cameras



Base: All Motorists N-1,241



National support for Safety Cameras has declined to 76% of motorists with only 41% supporting strongly. Support is lowest among those who drive for work.

Q.7a To what extent do you support or object to the use of safety cameras on the roads?



Seatbelts

Frequency of Seatbelt Usage

Base: All Motorists N – 1,241

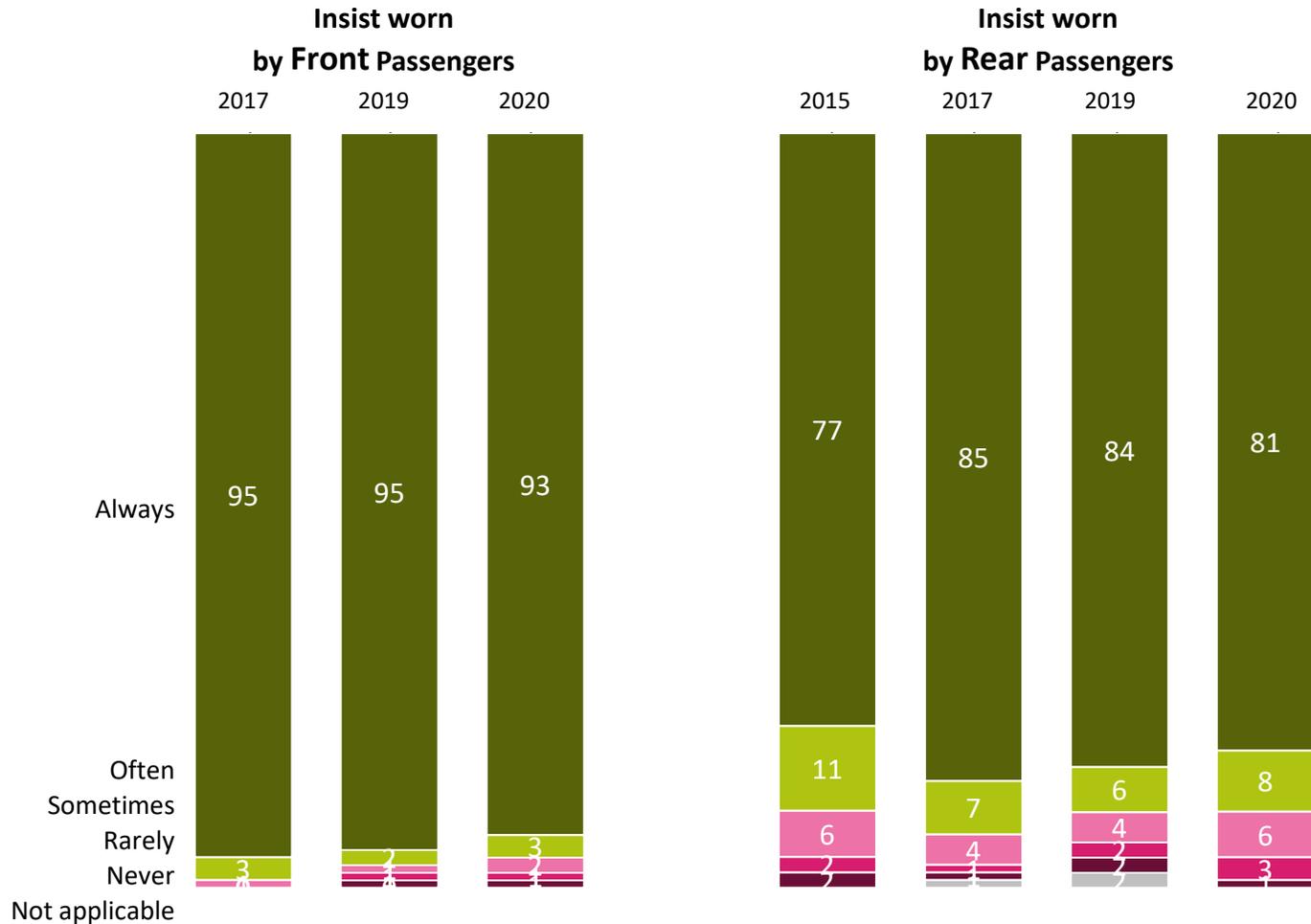
	Seat Belt Wearing when...		
	Driver	Front passenger	Rear passenger
	%	%	%
Always	97	97	84
Often	2	1	6
Sometimes	1	1	5
Rarely	0	0	2
Never	0	0	1
Not applicable	1	1	2



Q. How often do you use seat belts when you are a....

Frequency of Insisting that Seat Belts are Worn by Front and Rear Passengers

Base: All Motorists N – 1,241

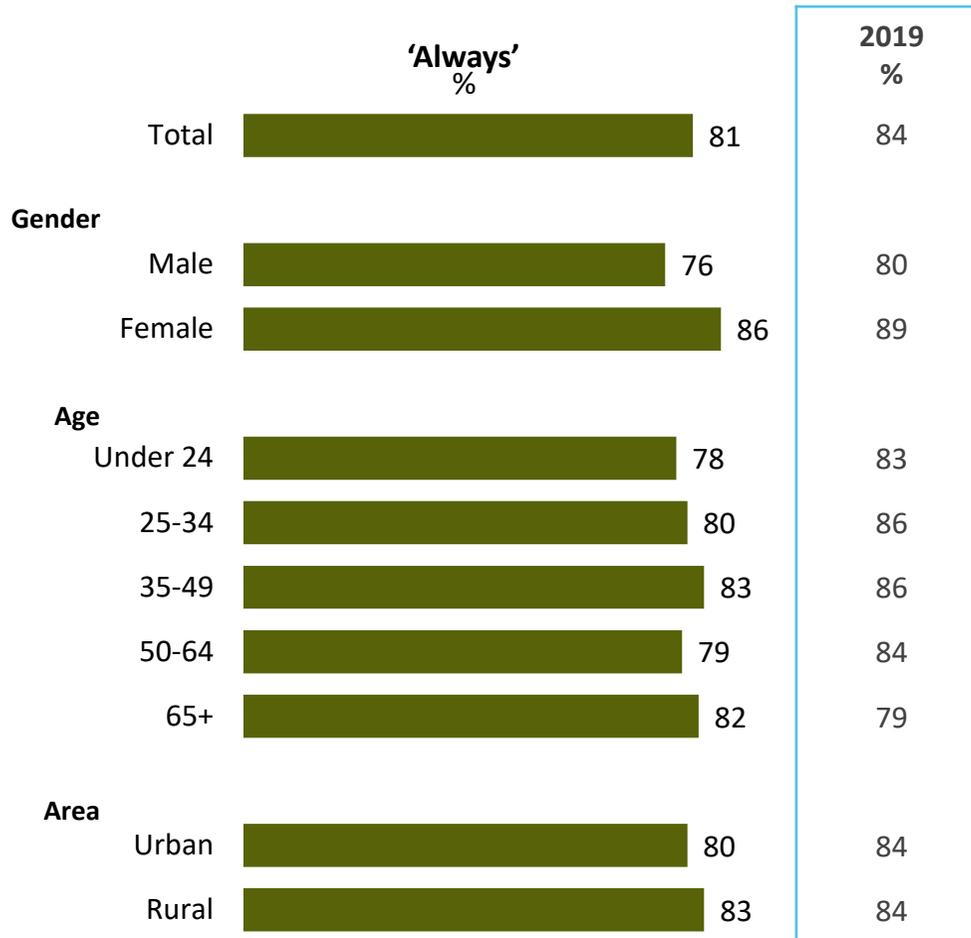
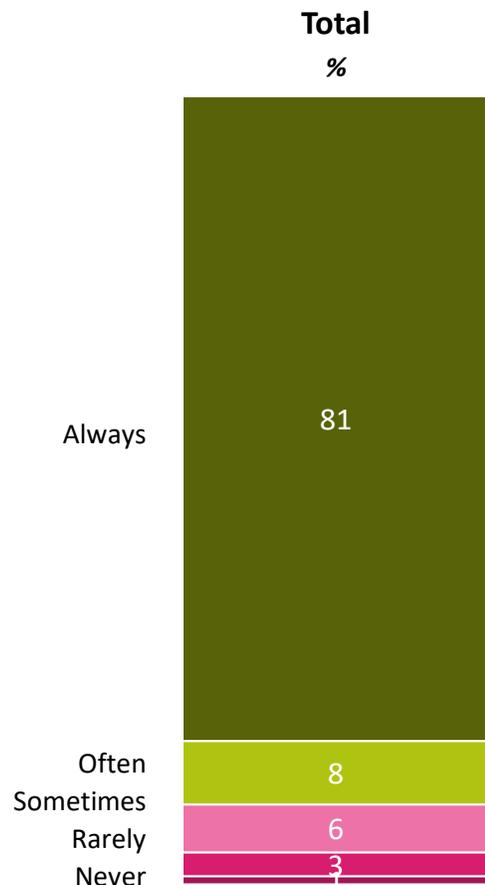


93% of motorists *always* insist that seat belts are worn by front seat passengers, this declines to 81% who *always* insist with rear seat passengers.

- Q. How often do you insist that seat belts are worn by those sitting in the front seat of your car?
- Q. How often do you insist that seat belts are worn by those sitting in the back seat of your car?

Frequency of Insisting that Seat Belts are Worn by Those Sitting in Back Seat of Car

Base: All Motorists N – 1,241



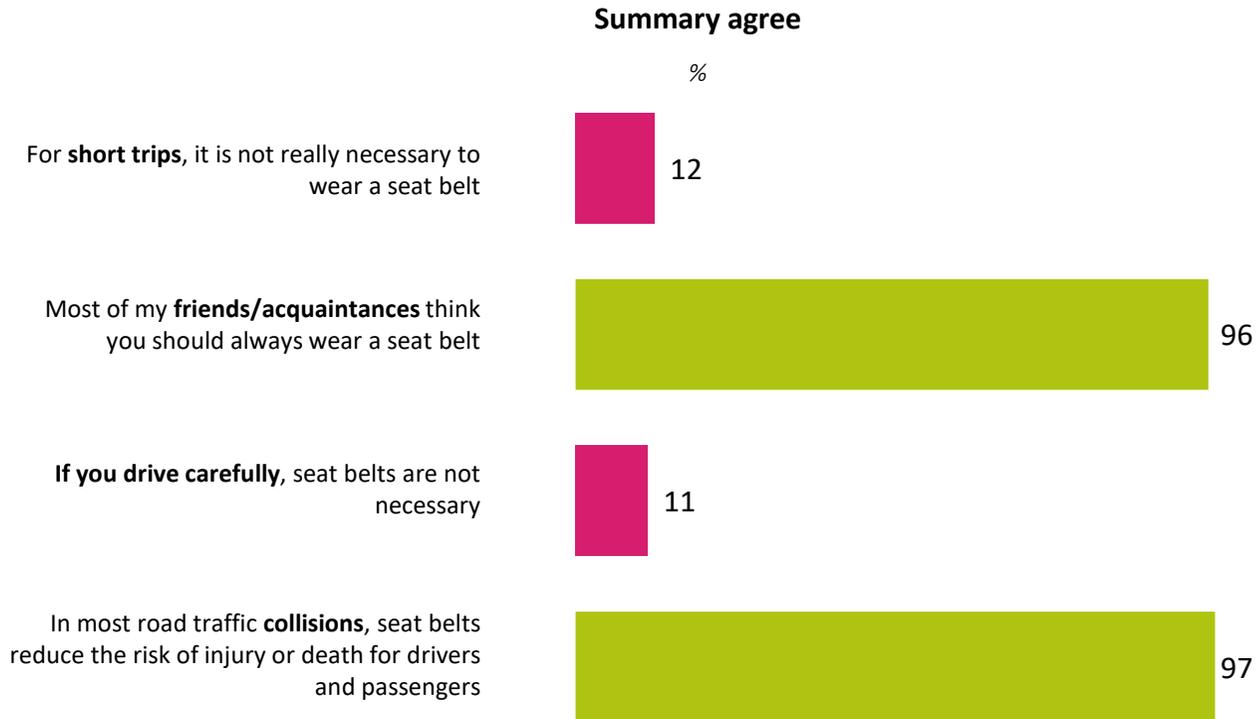
81% of motorists always insist that seat belts are worn by those sitting in back seats; peaking slightly among female motorists but largely consistent demographically. This constitutes a slight decline year on year.

Q. How often do you insist that seat belts are worn by those sitting in the back seat of your car?

Attitudes to seat belts

National Barometer Survey February 2020

Base: All Motorists N = 754



Summary Agree	Summary Agree	
	2020	
2019		
Total	-34 years	35+ years
%	%	%
13	13	12
97	97	96
15	15	10
97	97	97

From separate research, indications earlier in 2020 were that attitudes towards seatbelts were showing a slight positive movement.



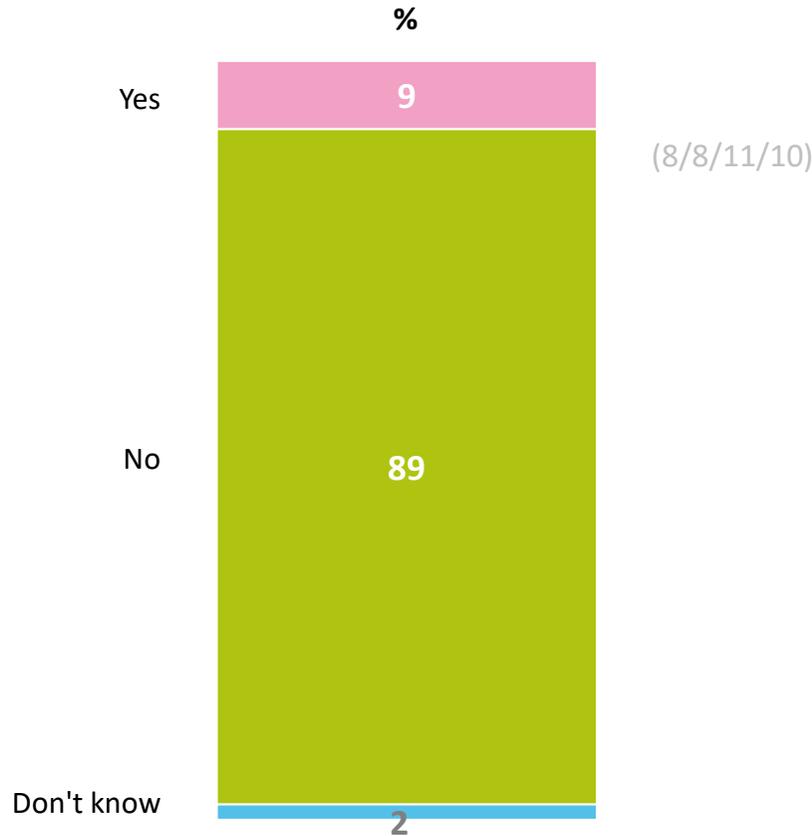
Q. To what extent do you agree or disagree with the following statements?



Alcohol

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

Base: All Motorists N – 1,241



Last Occasion – how much drank					
	2020 %	2019 %	2017 %	2015 %	2014 %
Less than 1 drink	22	15	12	18	12
1 drink	49	40	47	37	49
2 drinks	21	27	32	33	25
3+ drinks	6	15	8	11	12
Average	1.3	1.6	1.5	1.5	1.5

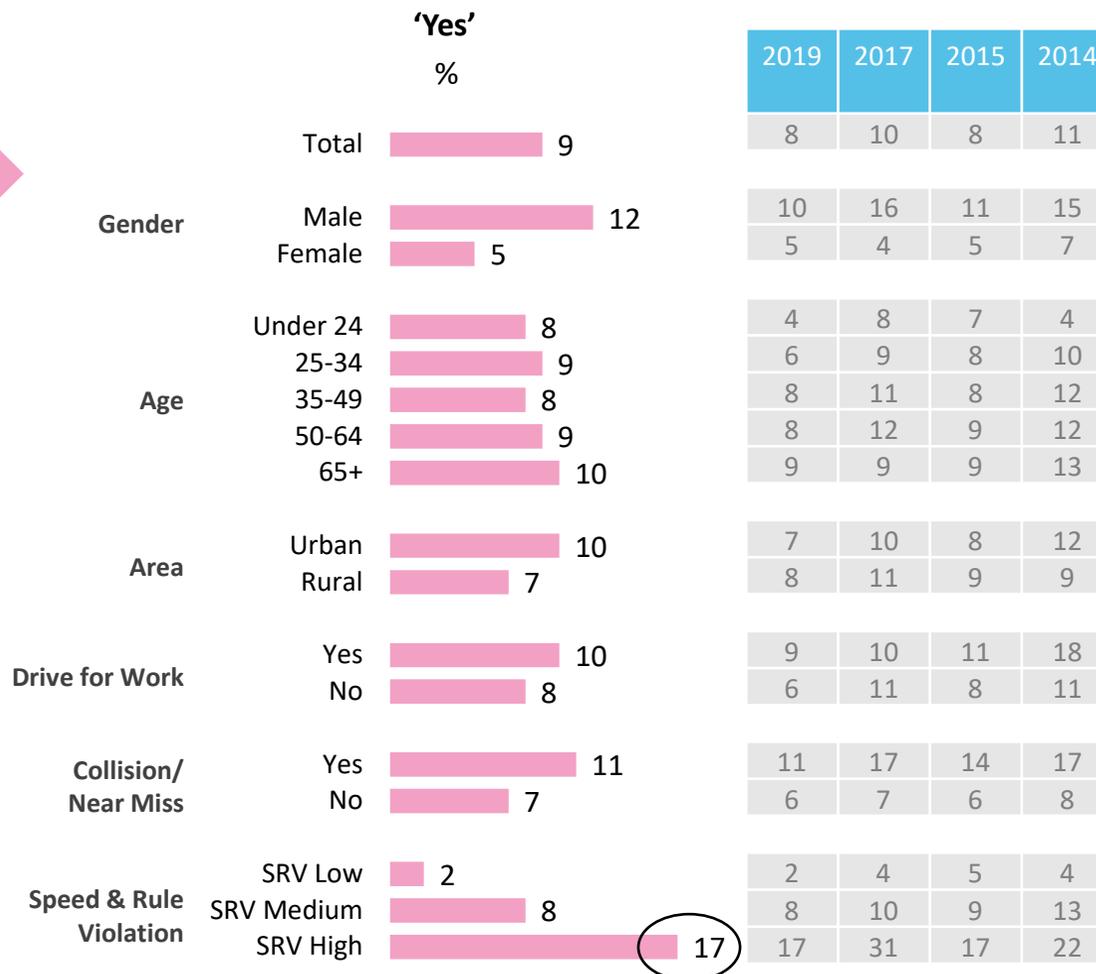
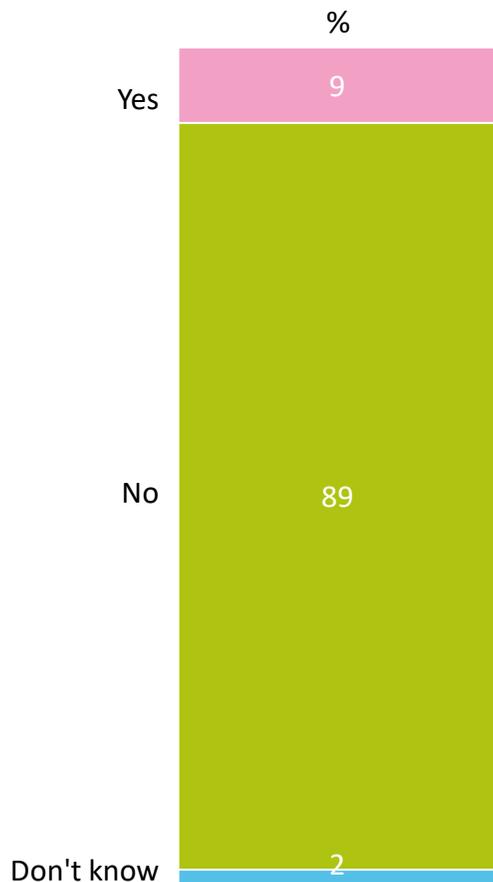
**9% of motorists consumed alcohol before driving in past 12 months – largely on a par with previous years
27% of this group had 2 or more drinks before doing so (down from 42% the previous year) .**

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?

(2019/17/15/14 Research)

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

Base: All Motorists N – 1,003



Driving after consuming alcohol shows a largely consistent demographic pattern albeit peaking among males. The key variation in analysis is the spike among the SRV High group, 17% of whom drove after consuming alcohol in the past 12 months.

Q. In the last 12 months have you driven a motor vehicle after consuming any alcoholic drink?

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



Base: All Motorists N – 1,241



58% of Irish motorists claim to have a 'no alcohol limit' before driving – down from 68% in 2019. Those who consumed alcohol before driving in the past year have an entirely separate perspective with only 9% having a no alcohol policy – strongly indicating at a habitual behaviour.

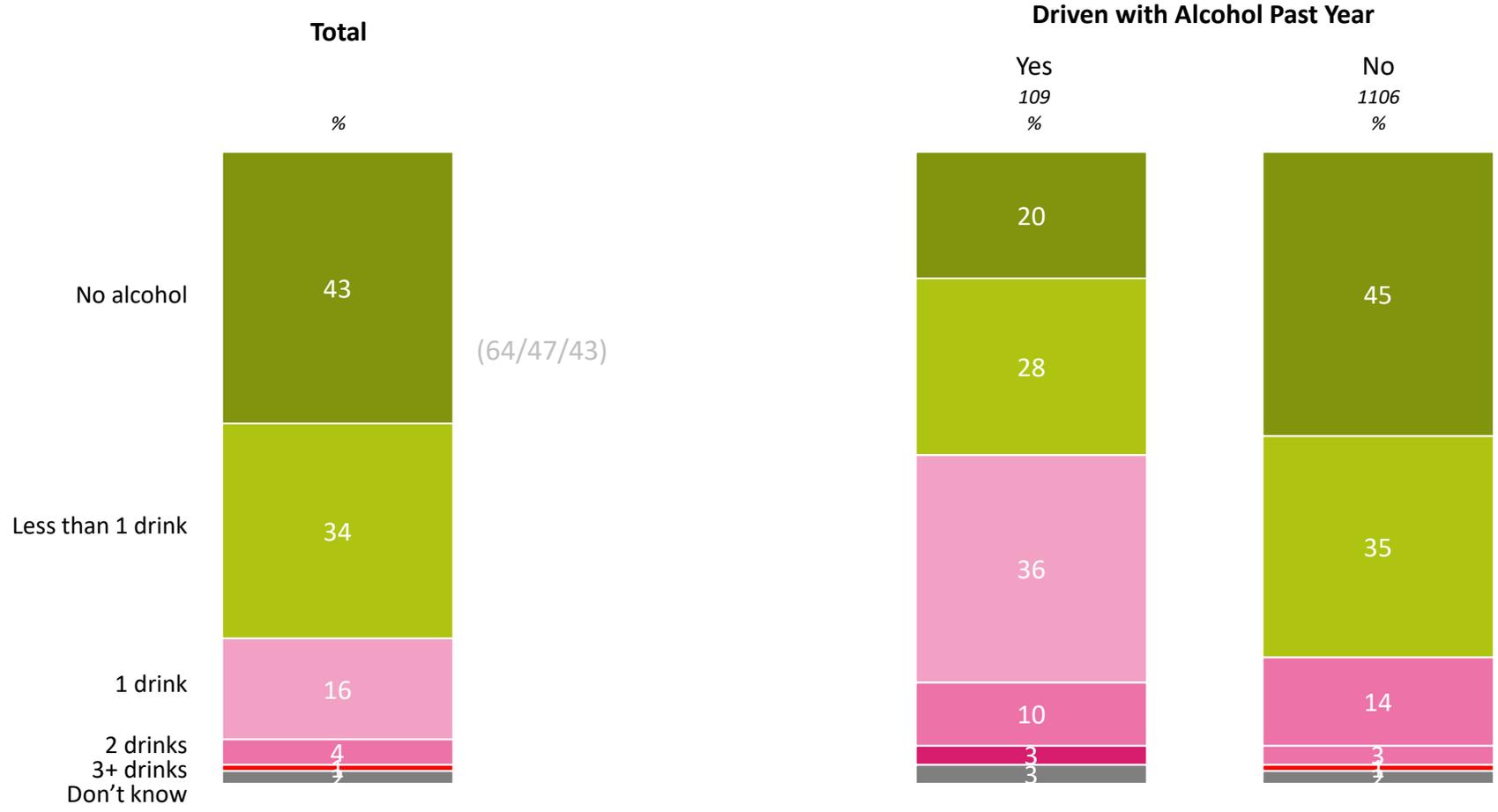
Q.10c Thinking about yourself, how much alcohol do you feel you can consume and be safe to drive?

(2019/17/15 research)

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



Base: All Motorists N – 1,241



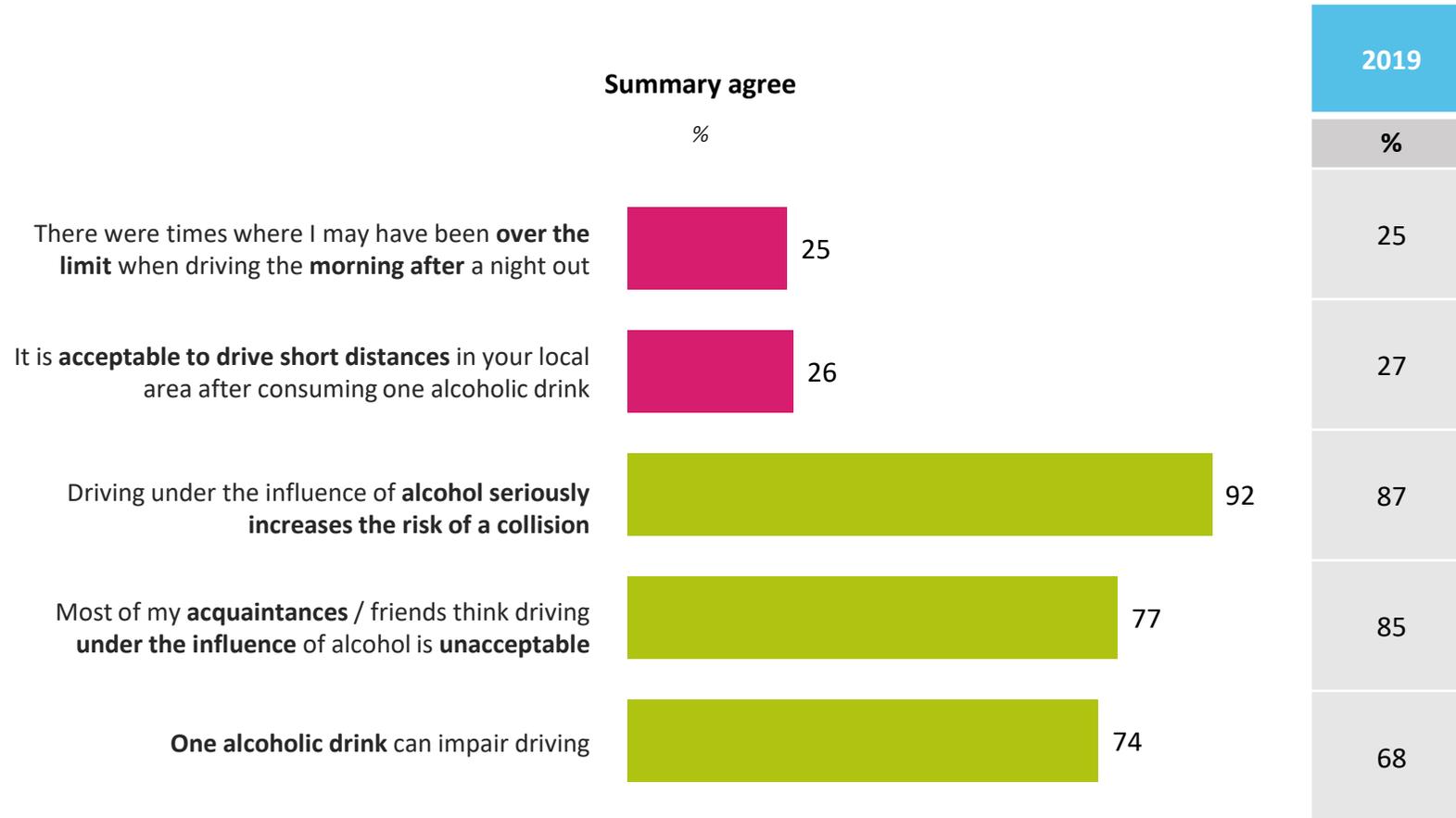
Perspectives on the legal limits relating to alcohol have also returned to pre 2019 levels. 43% of all motorists now believe 'no alcohol' can be consumed to remain under legal limit. The same strong divergence in attitudes between those who did/did not drink & drive in past 12 months is again evident.

Q.10d In your opinion, how much alcohol can you drink before driving and still remain under the legal limit?

(2019/17/15 research)

Alcohol and Driving Attitudes

Base: All motorists N – 1,241



Attitudes to alcohol remains largely consistent year on year. 1 in 4 motorists agree ‘there were times when they have been over the limit the morning after’. One negative trend is the reduction in motorists who claim drink driving is unacceptable among friends/acquaintances.

Q. To what extent do you agree ...

Alcohol and Driving Attitudes

Base: All motorists N – 1,241

	Total	Gender		Age					Social Class		Region					Area		Driven/ alcohol past year	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/ Ulster	Urban	Rural	Yes	No
<i>Base</i>	1241	603	638	107	283	391	289	171	695	546	345	896	324	333	239	846	395	109	1106
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
There were times where I may have been over the limit when driving the morning after a night out	25	30	19	16	27	31	21	17	27	23	23	25	22	29	27	26	23	52	22
It is acceptable to drive short distances in your local area (e.g. to a local shop, or home from a local pub) after consuming one alcoholic drink.	26	30	22	26	27	24	28	25	28	23	25	26	24	28	27	25	27	79	20
Driving under the influence of alcohol seriously increases the risk of a collision	92	90	93	83	92	90	93	96	92	92	90	92	92	91	94	91	93	86	93
Most of my acquaintances / friends think driving under the influence of alcohol is unacceptable	77	78	76	75	78	74	76	83	76	77	80	76	78	75	73	78	75	74	77
One alcoholic drink can impair driving	74	70	77	68	77	74	70	76	73	74	74	73	75	73	72	73	74	51	76

The divergence in both attitudes and behaviours among those who did/ did not drink and drive in the past 12 months is confirmed in responses to statements relating to ‘morning after’, ‘short distances’ and ‘one alcoholic drink’.



Q. To what extent do you agree ...

Summary: Alcohol and Driving

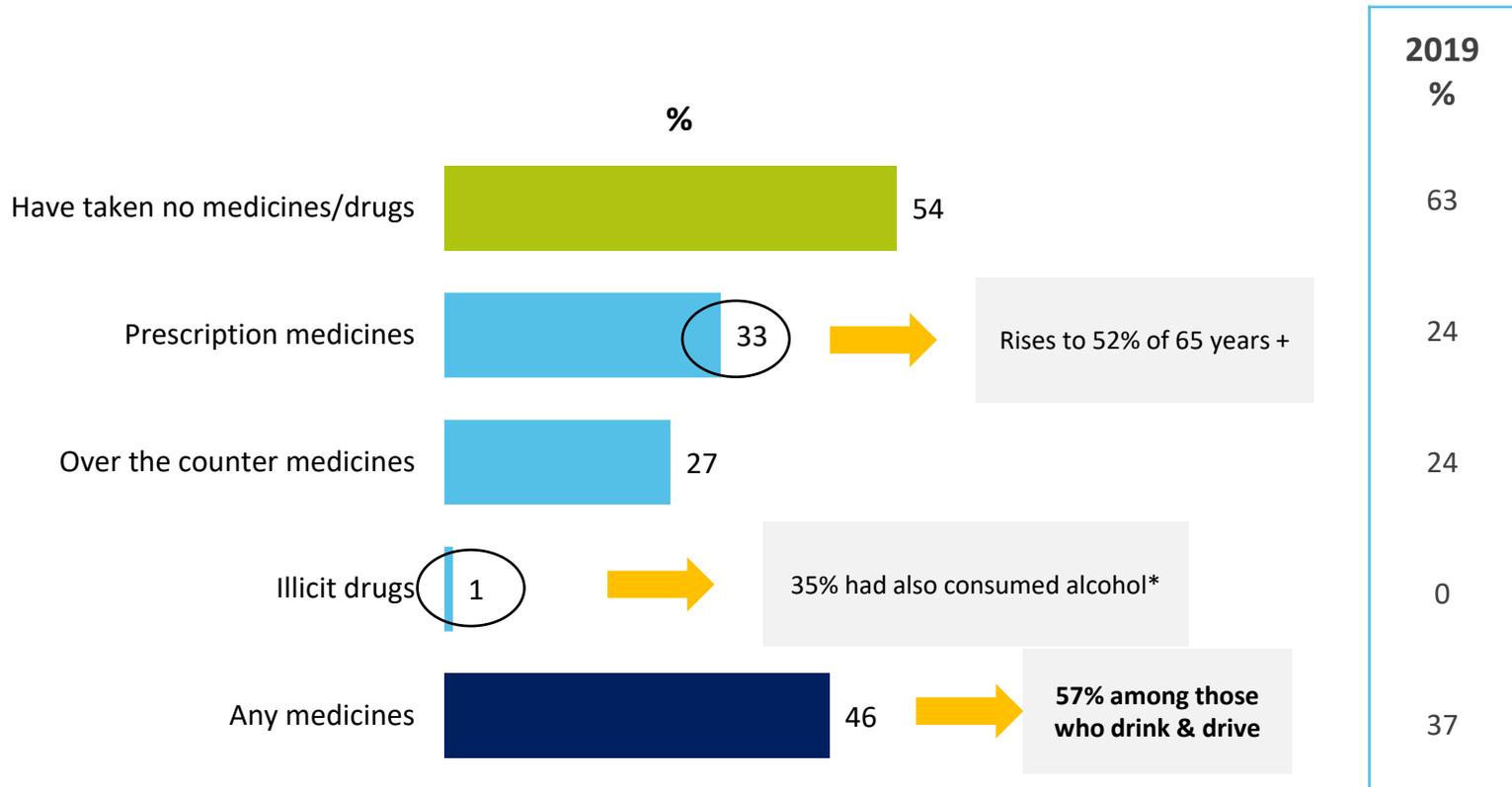
Base: All motorists N – 1,241

	All Motorists	Driven after consuming alcohol (past 12 months)
National Profile	100%	9%
No alcohol limit <i>(don't feel safe to drive if consumed any alcohol)</i>	58%	9%
Legal limit is no alcohol/ less than 1 drink	77%	48%
It is acceptable to drive short distances in your local area after consuming one alcoholic drink	26%	79%
There were times where I may have been over the limit when driving the morning after a night out	25%	52%

The summary highlights the distinct profile of these who drink and drive.

Driving and Medication

Base: All Motorists N-1,241

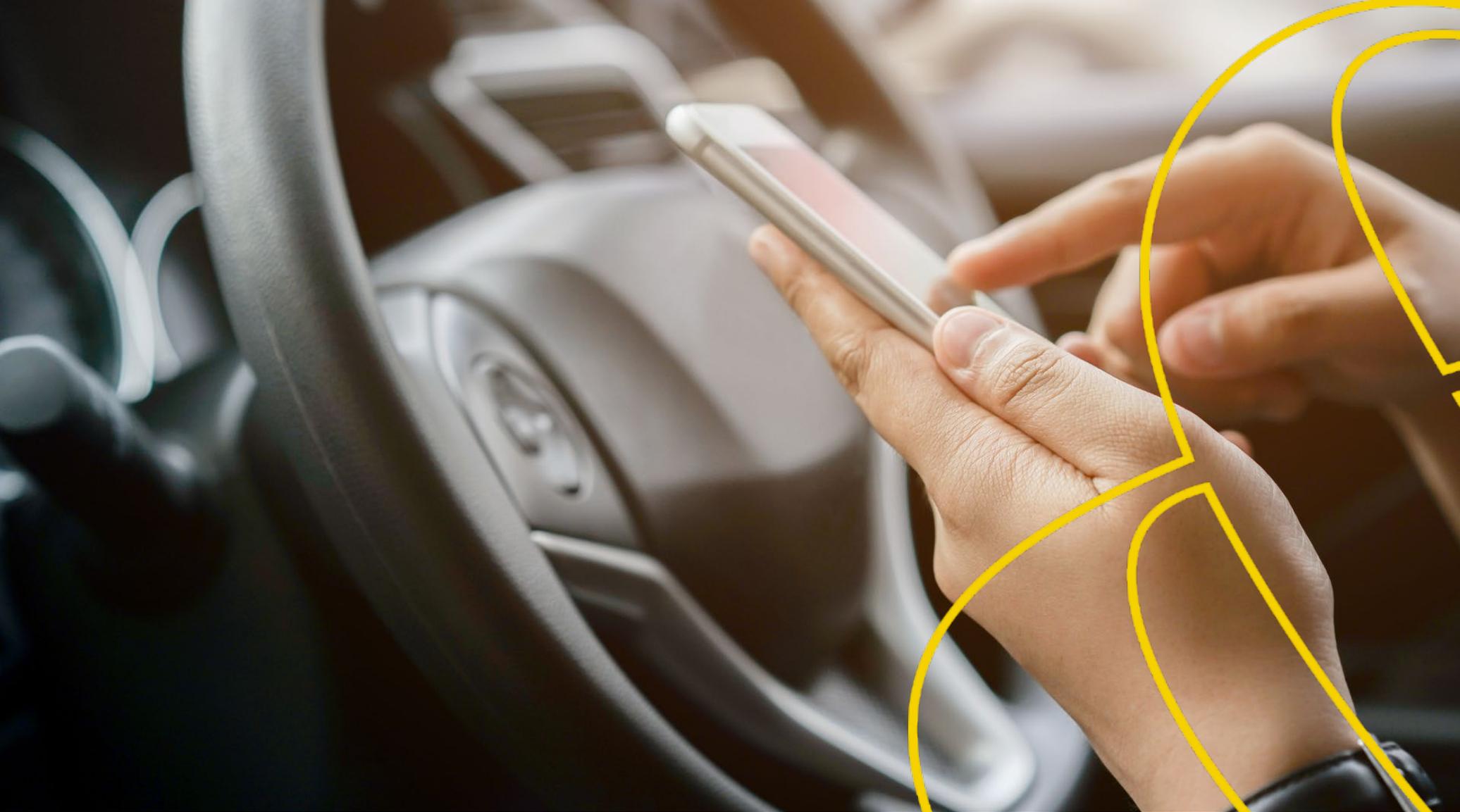


46% of motorists have taken 'any' medication before driving in the past 12 months; rising to 57% of those who consumed alcohol before driving.



Q.9a In the last 12 months have you taken any of the following and then driven a motor vehicle?
 Q.9b Thinking about the most recent occasion where you consumed illicit drugs and drove a motor vehicle, had you also consumed alcohol prior to the occasion?

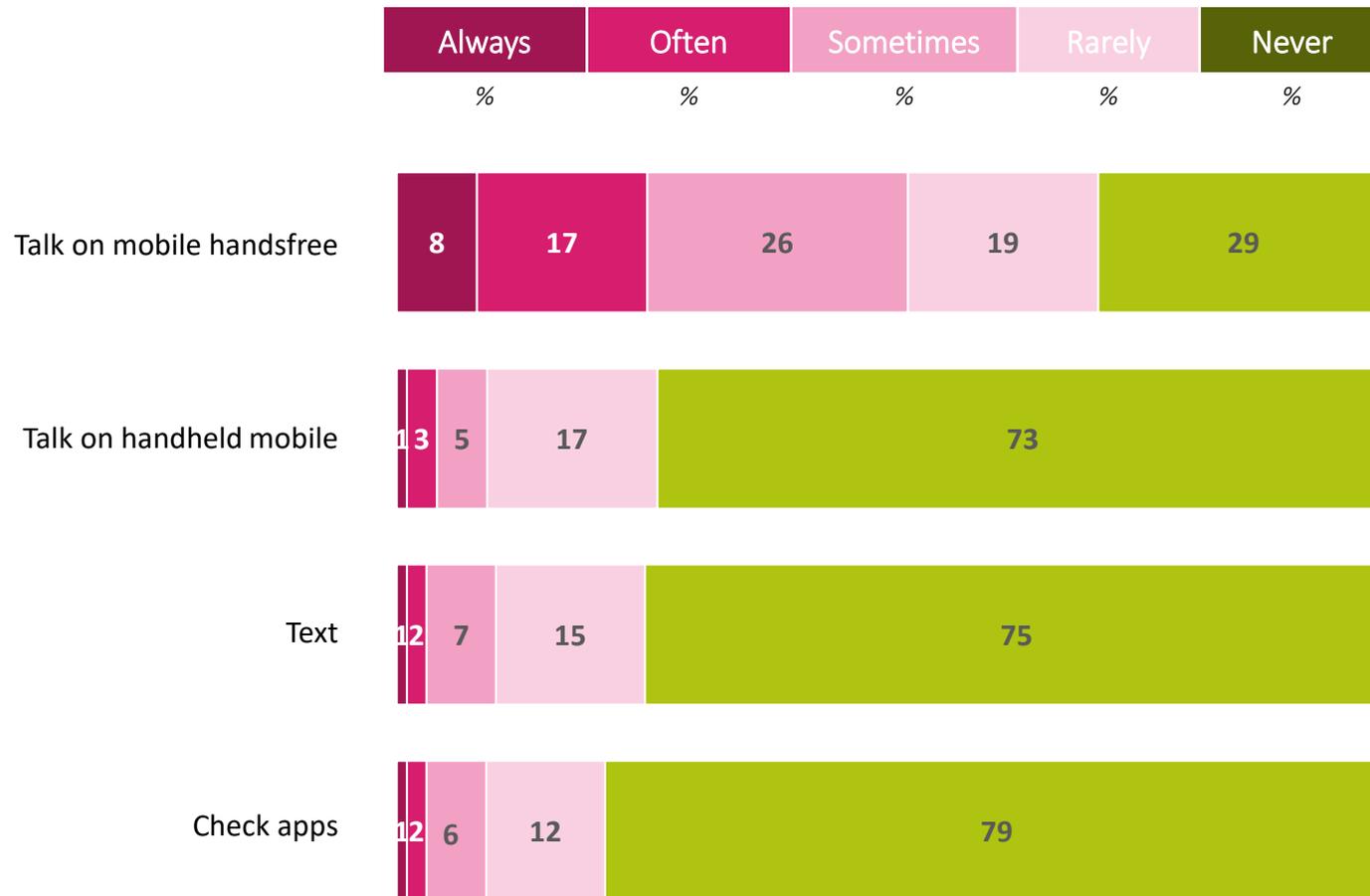
Caution very low base (n-11) reference only



Mobile behaviour

Mobile Phone Behaviour in Car

Base: All motorists N – 1,241



Sometimes+				
2020	2019	2017	2015	2014
%	%	%	%	%
51	52	42	41	36
9	12	10	10	13
10	6	4	6	6
9	4	3	3	3

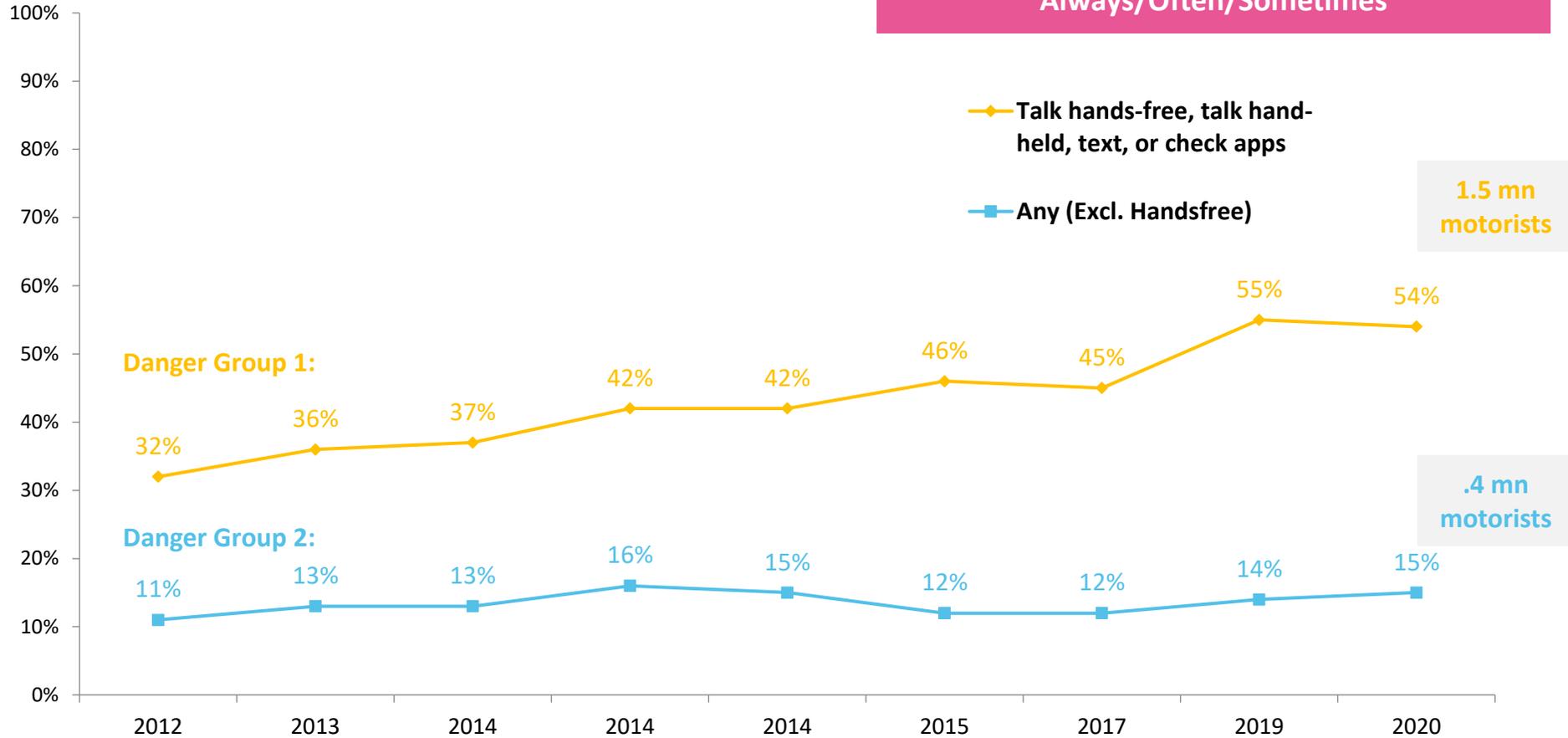
The sharp rise in hands free usage evident in 2019 is maintained; year on year rises also for texting & checking apps; usage slightly down however for *talk on handheld phones*.

- 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?

Mobile Phone Behaviour in Car

Base: All motorists

Always/Often/Sometimes



A combined 54% of motorists do at least one of the listed behaviours 'sometimes' or more often ('Danger Group 1') maintaining the rise evident in 2019. 15% of motorists talk on handheld, text or check apps with some regularity (Danger Group 2).



- 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?

Mobile Phone Behaviour in Car



Base: All motorists N –1,241

	Total	Gender		Age					Social Class		Region					Area	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
	1241	603	638	107	283	391	289	171	695	546	345	896	324	333	239	846	395
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Hands Free	51	54	47	45	56	60	47	32	56	45	50	51	47	57	48	51	50
Handheld	8	9	7	11	13	10	5	3	10	6	10	8	7	9	8	9	8
Text	9	11	8	11	13	14	5	1	12	6	11	9	9	10	7	10	8
Check Apps	9	10	7	11	12	13	3	2	10	7	13	7	6	9	6	9	7
Danger Group 1	54	58	50	51	59	62	51	35	59	47	53	54	51	61	50	54	53
Danger Group 2	15	16	14	19	20	20	9	6	18	11	18	14	13	15	13	15	14

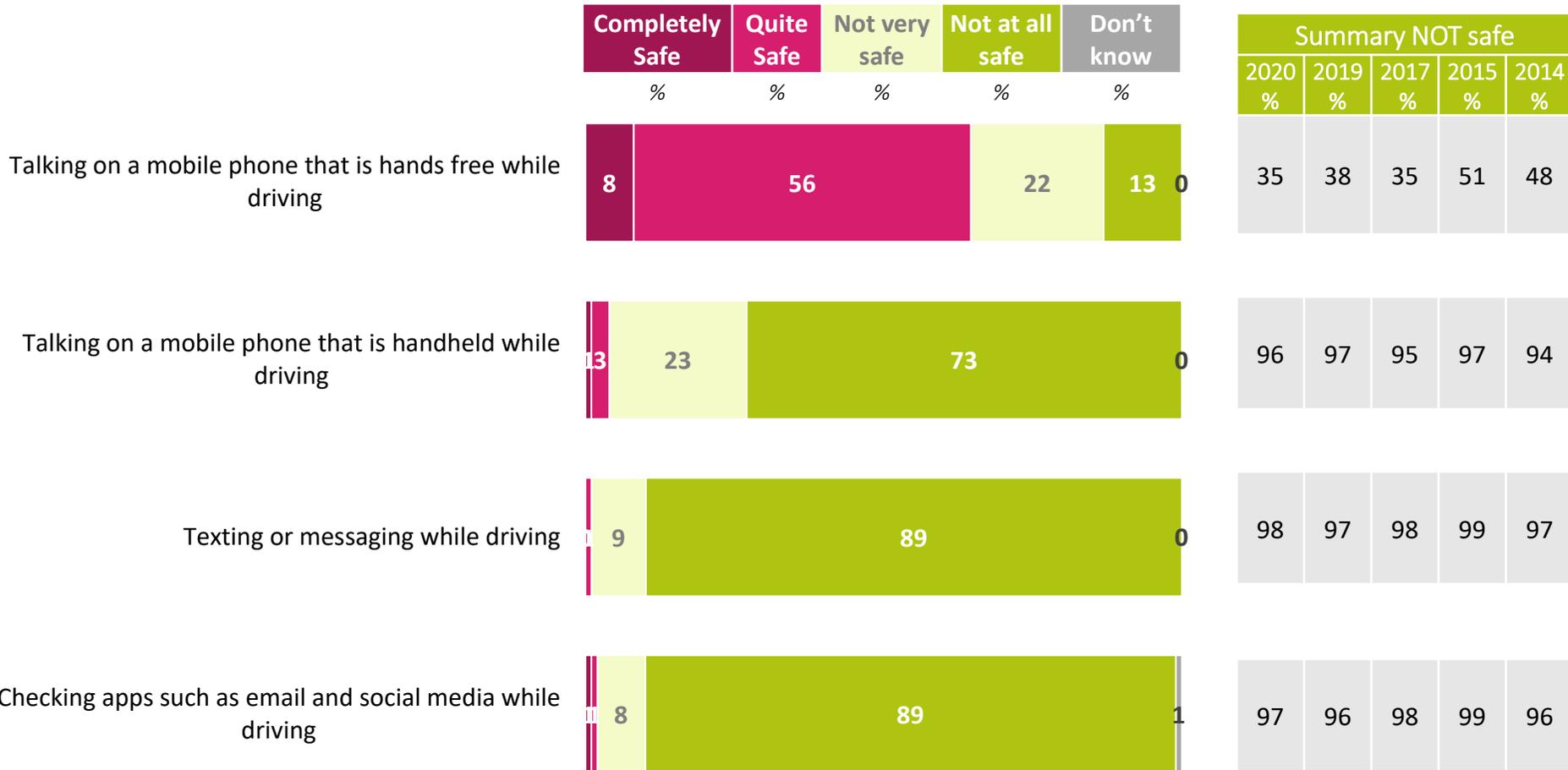
The Danger Groups remain highly correlated with age; with both Danger Groups also peaking among ABC1's.



- 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?

Safety of Mobile Phone in Car Behaviour

Base: All motorists N –1,241



The perception of the safety of mobile phone usage remains stable: 35% of motorists consider hands free calls not to be safe.

Q. How safe or not would you consider each of the following behaviours while driving?

Safety of Mobile Phone in Car Behaviour

Base: All motorists N –1,241

SUMMARY UNSAFE	Total	Mobile Danger Group	
		Danger Group 1: 'Any'	Danger Group 2: 'Any Excl. Handsfree'
<i>Base:</i>	1241	669	186
	%	%	%
Talking on a mobile phone that is hands free	35	16	20
Talking on a mobile phone that is handheld	96	93	82
Texting or messaging	98	97	91
Checking apps such as email and social media	97	96	88

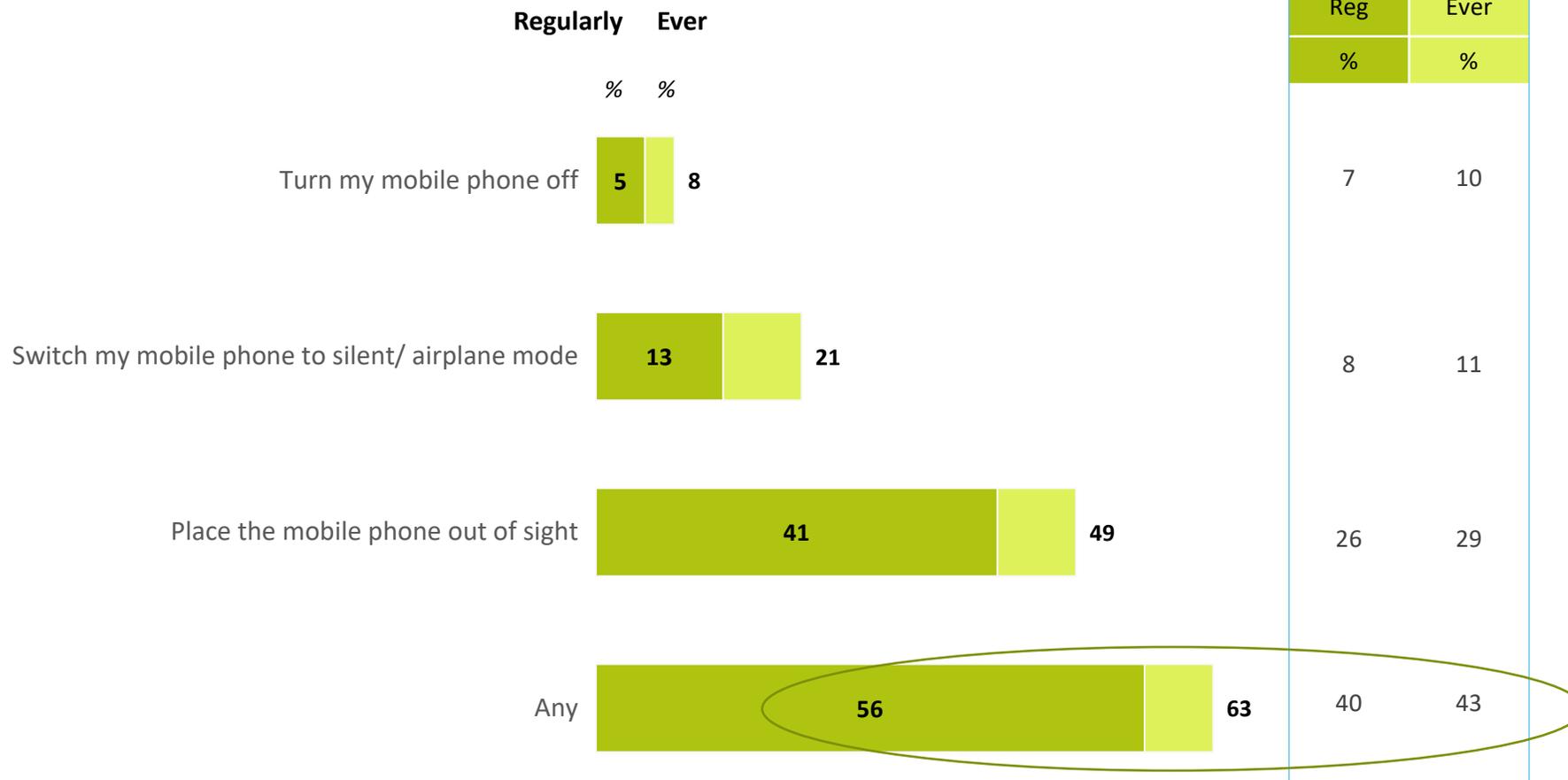
Safety perceptions inform behaviour with a much lower incidence in the Danger Groups associating risk to hands free calls; and among Danger Groups 2 with each behaviour.

Q. How safe or not would you consider each of the following behaviours while driving?

Mobile Phone Safe Behaviour:

Actions before setting off to drive

Base: All motorists N – 1,241



In a positive development, the incidence of motorists taking preventative safety measures with their phones has increased significantly year on year.

Q.11f Which, if any, of the following have you ever done with your mobile phone before setting off to drive?
 Q.11g And which would you do with your mobile phone before setting off to drive regularly, say at least once a week?

Mobile Phone Safe Behaviour: Actions before setting off to drive

Base: All motorists N – 1,241

DO REGULARLY	Total	Mobile Danger Group	
		Danger Group 1	Danger Group 2
Base:	1241	669	186
	%	%	%
Turn my mobile phone off	5	3	4
Switch my mobile phone to silent/ airplane mode	13	10	14
Place the mobile phone out of sight	41	35	26
Any	56	46 (28)	42 (28)

(2019)

While still lower than the national incidence, there has also been a significant rise within the Danger Groups in adopting the preventative measures.

Q.11g And which would you do with your mobile phone before setting off to drive regularly, say at least once a week?



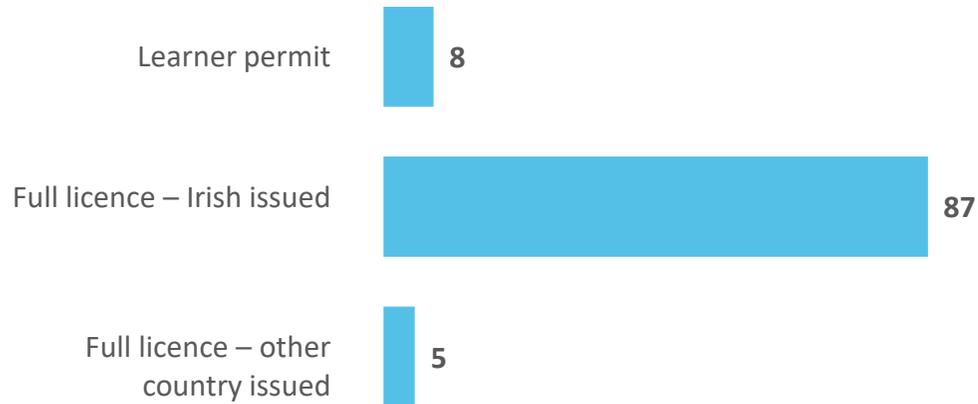
Learner Drivers

Motorists Profile

Base: All motorists N – 1,241

Type of Licence

%



Length of time driving

	%
Under 2 years	8
2 – 5 years	9
6 – 10 years	9
11 – 20 years	25
21 – 30 years	19
31+ years	27

26% of motorists have been driving for ten years or less.



Q.2a Do you have a driving licence/permit of any type?

Q.2b Is it a learner permit, or a full licence issued in Ireland or in another country?

Attitudes to Learner Drivers Restrictions

Base: All motorists N – 1,241



Support for each of the proposed learner driver restrictions is between 39% & 52% of motorists with indications of growing year on year support.

Q.12 To what extent do you agree or disagree with the following additional restrictions? ...

Wording amended in 2020 survey.

Attitudes to learner driver restrictions

Base: All motorists N – 1,241

	Total	Time Driving					
		Under 2 years	2-5 years	6-10 years	11-20 years	21-30 years	31+ years
	1241	114	132	122	311	223	317
	%	%	%	%	%	%	%
Restricting drivers with a learner permit to driving during daylight hours only (i.e. not at night)	41	31	34	38	38	42	50
Restricting drivers with a learner permit to carrying no passengers other than the accompanying driver	52	33	36	44	50	54	67
Restricting drivers with a learner permit to carrying no more than one other passenger who must be aged over 25 in addition to the accompanying driver	39	19	34	36	40	42	47
Any	63	48	52	55	60	63	78

Support for restrictions is highly correlated to driving experience (years driving); support for any of the restrictions remains below 60% for those with up to 10 years driving experience, with support increasing consistently after that.

Q.12 To what extent do you agree or disagree with the following additional restrictions? ...



Motorist segmentation

RSA Motorists Segmentation Analysis



- An ongoing objective of this research is to identify groups or **segments** of motorists who engage in one or more forms of errant road behaviour.
- To do this we look at motorists who have **similar response patterns** across a series of key questions relating to driver behaviour.
- We identify **three segments**, which are broadly defined by increasingly poor driver behaviour (Green, Amber and Red).

Speeding and Rule Violation

Mobile Phone Danger Groups

Safety Camera Support

Collision/ near miss as driver

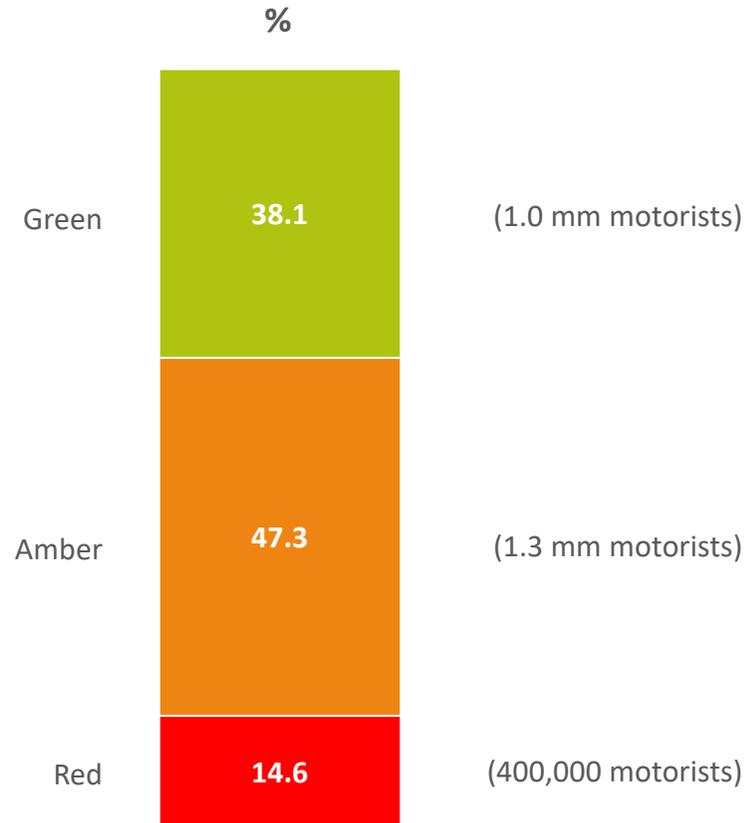
Alcohol

We identify three segments which are broadly defined by increasingly poor driving behaviour (Green, Amber and Red).

RSA Motorists Segmentation Analysis

Segments size and scale

Base: All motorists N – 1,241

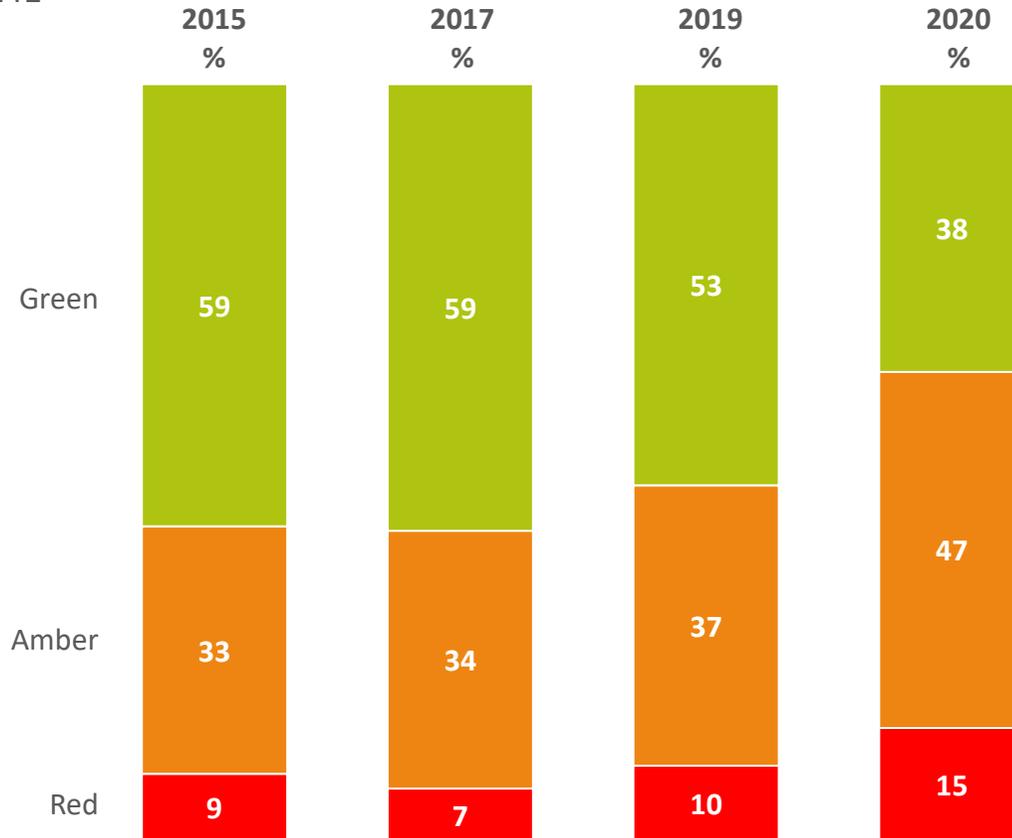


We identify three segments which are broadly defined by increasingly poor driving behaviour (Green, Amber and Red); the Red segment exhibiting the poorest driver behaviour. In the Covid 19 dominated year of 2020, 14.6% of motorist qualify for the Red segment.

RSA Motorists Segmentation Analysis

Segments size and scale 2015-2020

Base: All motorists N – 1,241



In 2020 the size of the Red segment (poorest driver behaviour) has increased by 50% - from an incidence of 10% to 15% of motorists.

RSA Motorist Segmentation Analysis

Segment Demographic Characteristics



	Total	Segments		
		Green	Amber	Red
<i>Base:</i>	1241	477	580	184
	%	%	%	%
Gender				
Male	51	40	58	60
Female	49	60	42	40
Age				
-24	7	9	5	9
25-34	20	18	19	28
35-49	34	28	35	43
50-64	24	23	26	18
65+	15	21	15	3
<i>-34 years</i>	27	27	24	37
<i>+34 years</i>	73	73	76	63
Social Class				
ABC1	52	45	54	66
C2DE	48	55	46	34
Region				
Dublin	27	27	24	33
Leinster	29	28	30	26
Munster	25	27	25	23
Connacht/Ulster	19	17	22	17
Class				
Urban	60	61	59	64
Rural	40	39	41	36

The Red Segment remains heavily skewed towards males and younger motorists; and increasingly to ABC1's & motorists in Dublin.

RSA Motorist Segmentation Analysis

Segment Behavioural Characteristics

Behaviours	Green (38%)	Amber (47%)	Red (15%)
Drive for Work	25	35	42
High Speeding & Rule Violation	-	32	63
Mobile Phone Danger Group 2 (excl. handsfree)	4	3	83
Any Collision/near miss	39	51	61
Alcohol before driving	4	10	18

63% of the red segment are high speeding & rule violators; and 83% frequently use a handheld mobile phone while driving.

RSA Motorist Segmentation Analysis

Segment Attitudinal Characteristics



Attitudes	Green (38%)	Amber (47%)	Red (15%)
	%	%	%
Urban Speeding (Low) Acceptable	49	66	72
Urban Speeding (High) Acceptable	22	39	54
There were times where I may have been over the limit when driving the morning after a night out (Summary Agree)	10	28	51
It is acceptable to drive short distances in your local area after consuming one alcoholic drink (Summary Agree)	17	26	47
One alcoholic drink can impair drivers (Summary Agree)	81	72	60

The attitudinal profile for the Red segment is also increasingly distinct.



Summary & Conclusions

Driver Attitudes & Behaviour Survey Key Learnings



1.

Attitudes of motorists to errant road behaviour during the year of COVID-19 has become more permissive, especially in relation to speeding, halting the attitudinal momentum frequently evident in 2019.

2.

The research uses a series of approaches to group motorists in relation to road safety; these typically indicate a strong negative dynamic during 2020.

3.

The *Speeding & Rule Violation* analysis indicates the High (rule breaking) group has risen to 24% of motorists – easily the highest level to date in the research series. Only 1 in 4 motorists (24%) qualify for the most law abiding ‘low’ group.



4.

The divergence in both attitudes and behaviours among those who did/ did not drink and drive in the past 12 months is confirmed; only 9% of those who consumed alcohol before driving in the past year having a no alcohol policy – strongly indicating at habitual drink driving behaviour.

5.

The measures relating to mobile phone use show a more stable year on year trend with the encouragement that the incidence of motorists taking preventative safety measures with their mobile phones has significantly increased.

6.

The research identifies three overall segments which are broadly defined by increasingly poor driving behaviour (Green, Amber and Red): In 2020 the size of the Red segment (poorest driver behaviour) has increased by 50% .

Thank you.



RESEARCH
& INSIGHT

Delve deeper

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