



Road Safety Attitudes & Behaviours

DRAFT REPORT

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METHODOLOGY



INTRODUCTION

This report presents the findings of the 2017 Ministry of Transportation Road Safety Survey. Similar surveys were conducted in 2011, 2013 and 2015. Data from previous surveys are presented in the report where available and appropriate.

SURVEY METHOD AND SAMPLE SIZE

The survey was conducted with representative sample of n=1431 Ontarians age 16+. The survey used a mixed method approach with n=1231 respondents surveyed online and n=200 respondents surveyed by telephone. The data has been weighted by age, gender, and region to ensure that it is representative of the Ontario population based on 2016 Census data.

The precision of Ipsos online polls is measured using a credibility interval. In this case, the 2017 results (n=1431) are accurate to within ± 3.0 percentage points. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error

The survey was conducted between October 18 and October 30, 2017 and the median survey length was 23 minutes.

REPORTING CONVENTIONS





COMPARING AGAINST TRACKING DATA

When comparing results between the full samples in 2017 (n=1431) and 2015 (n=1010), any difference greater than 5 percentage points would be considered statistically significant at the 95% level of confidence. Differences of less than 5 points may or may not be significant, depending on the level of consensus to the question. Subgroups within the sample will have varying thresholds for significance.

DENOTATIONS

Throughout the report the following symbols have been used:

- Small base sizes are denoted with an asterix*
- Arrows   have been used to denote statistically significant differences between 2017 to 2015 data and the target segments vs. the overall average
- Letters are used to denote statistically significant differences for demographic subgroup tables (age, region, gender). The statistically higher figure will have the letter corresponding to the column of the statistically lower figure placed beside it.

BASE SIZES

Where totals do not add to 100%, it is due either to rounding or respondents were permitted to multiple responses. The telephone survey employed split sampling on lengthy batteries, thus the base size will be reduced on these questions.

MODE OF TRANSPORT










The Road Safety Survey seeks to understand the attitudes and behaviours of users of various modes of transportation. Behaviour-related questions are asked to those who use have ever used that mode of transportation. Usage is based on the natural fall-out. Aside from walking and travelling as a vehicle passenger the incidences of each mode is down compared to 2015 (just outside the threshold for significance).

		% EVER				
		2017	2015	2013	2011	Δ 2015/ 2017
Walk outdoors	97%	97%	97%	98%	-	-
Travel in vehicle as passenger	88%	88%	88%	90%	90%	-
Drive a car, SUV, truck	80%	80%	86%	83%	83%	-6 ↓
Ride a bicycle or e-bike	47%	47%	51%	61%	48%	-4 ↓
Drive an ATV or off-road vehicle	15%	15%	19%	22%	13%	-4 ↓
Rollerblade / skateboard / scooter	14%	14%	20%	23%	-	-6 ↓
Ride a motorcycle, scooter or moped	12%	12%	15%	18%	10%	-3 ↓

Q1. In a typical week during the spring, summer and fall, how often do you do each of the following?
Base: All respondents 2017 (n=1431); 2015 (n=1010); 2013 n=(1006)

TARGET SEGMENTS DEFINED

The Ministry of Transportation uses target segments to analyze attitudes and behaviours of mode users. These target segments are typically a demographic segment of mode users. Since the sample size for the 2017 survey was increased to n=1400 from n=1000 (in 2015), the n sizes for target segments are larger despite declines in the natural fall-out of certain modes.

			2017	2015	Δ 2015/ 2017
	YOUNG MALE DRIVERS	Q1 = 'Motorists' + AGE = 18-34 + GENDER = Male	n=139	n=148	-9
	SENIOR DRIVERS	Q1 = 'Motorists' + AGE = 60+	n=291	n=195	+96
	NOVICE DRIVERS	Q1 = 'Motorists' + AGE = 16-21	n=44	n=43	+1
	DRIVERS 25-55	Q1 = 'Motorists' + AGE = 25-55	n=688	n=531	+157
	PEDESTRIANS	Q1 = 'Walk outside' ever	n=1389	n=977	+412
	CYCLISTS	Q1 = 'Ride a bicycle or e-bike' ever	n=658	n=499	+159
	MOTORCYCLISTS 25-64	Q1 = 'Ride a motorcycle, scooter or moped' ever + AGE = 25-64	n=137	n=129	+8

Q1 MOTORISTS = THOSE WHO EVER DRIVE A CAR, VAN, SUV, TRUCK, MOTORCYCLE, SCOOTER, MOPED, ATV OR OFF-ROAD VEHICLE



EXECUTIVE SUMMARY

ROAD SAFETY PERCEPTIONS AND KNOWLEDGE



SAFETY OF ONTARIO'S ROADS - *Confidence in road safety has declined and Ontarians want more action*

- The vast majority feel Ontario's roads are at least somewhat safe, however fewer believe the province's roads are very safe compared to 2015 returning to lower levels seen in 2013 and earlier. Perceptions of road safety for more vulnerable groups including pedestrians and cyclists has also declined.
- Ontarians broadly agree that not obeying the rules endangers others, yet only a minority feel most drivers actually obey the rules of the road and strong majorities feel there needs to be an increased focus on catching unsafe drivers including both motorists and cyclists. Compounding this issue is that confidence in the ability of the police to identify drug impaired drivers in particular has softened since 2015.
- We have also observed an increase in reported collisions and in the proportion who have travelled as a passenger with someone under the influence of alcohol or who have felt unsafe because the driver was speeding or tired.

ROAD SAFETY KNOWLEDGE - *More Ontarians understand distracted driving offenses, but still a ways to go*

- Knowledge of distracted driving offenses remain high and have in fact increased since 2015 including: proper slow down and move over situations and knowledge of ticketable offenses. Nonetheless, there remains room for improvement in terms of awareness, specifically proper BAC, and particularly for novice drivers which tends to be overestimated.

ROAD SAFETY ATTITUDES & BEHAVIOURS



ATTITUDES TOWARD RISKY BEHAVIOURS

– More Ontarians believe that aggressive driving, distracted and impaired behaviours are dangerous, and many believe that they continue to occur more often than in the past. However, some feel these behaviours have improved over the past 2 years, and fewer admit to distracted driving personally.

This may reflect the fact that more people know it is completely unacceptable to use a mobile phone without a hands free device when driving and/or an increased social shame/intolerance for engaging in these behaviours. This might be viewed as progress.

- Ontarians express strong agreement with the dangers of distracted, impaired or aggressive behaviours regarding driving and, albeit to a lesser extent, risky cycling or pedestrian behaviours. Compared to 2015, there is a greater acknowledgement among Ontarians that these actions are dangerous, specifically distracted / impaired driving and cycling.
- While fewer motorists admit to engaging in distracted driving behaviours and driving after taking alcohol compared to 2015, an increasing number admit being in these circumstances as a passenger, both for having travelled with a driver who was texting and having travelled with someone under the influence of alcohol.



Motorcyclists 25-64 feel the most safe on Ontario's roads and yet show the poorest attitudes and engage in more dangerous behaviour across all forms of risk – distracted, impaired and aggressive driving – than any other segment.

VULNERABLE ROAD USERS



ATTITUDES AND BEHAVIOURS TOWARD WALKING AND CYCLING - *Ontarians continue to underestimate the dangers of distracted pedestrian and cycling behaviours, but momentum is in the right direction*

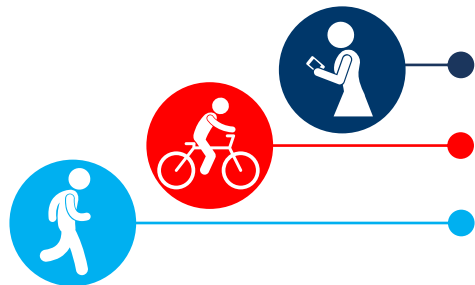
- Ontarians generally feel that distracted pedestrian behaviours are less dangerous than distracted driving or cycling behaviours and are more likely to engage in them more frequently. They also consider activities like jay-walking, which is particularly common, and impaired walking less dangerous than in the past.
- Attitudes toward cyclists have improved. The importance of taking special precautions around cyclists and pedestrians has also increased since 2015, while fewer feel cyclists don't belong on the road.
- Compared to 2015, Ontarians are more likely to feel that cycling while sending or reading a text message or cycling without wearing a helmet is dangerous.
- Senior drivers are more likely to find all pedestrian actions to be extremely/somewhat dangerous, particularly regarding walking at night while wearing dark clothing and walking while speaking on a cell phone. Young male drivers conversely, are less likely to find all pedestrian behaviours to be dangerous. Novice drivers do not feel walking while either listening to headphones or speaking on a cell phone are particularly dangerous. Cyclists view walking at night while wearing dark clothing or jay-walking during the day with less caution and are less likely to say these actions are dangerous.

DISTRACTED BEHAVIOURS



DISTRACTED BEHAVIOUR INDICES - *Attitudes toward distracted behaviour are correlated with admitted behaviour; Young Male Drivers are the most likely to engage in distracted driving.*

- Three indices were developed to help quantify the frequency of distracted behaviours as it relates to driving, cycling and walking. By comparing the different scale points across the three indices we can see that Ontarians are more likely to engage in distracted walking behaviours, and to do so more frequently, than they are distracted cycling or driving.
- By profiling each group (Never, Low, Mod, High) by demographics and attitudes we found that those who engage in distracted behaviours more frequently, whether while driving, cycling or walking are less likely to believe those activities are dangerous and more likely to be male or to be under the age of 44 years old (very consistent with the Young Male Driver segment).



	Never	Low	Mod	High	Average rating
INDEX	1	>1-<2	2-<3	3+	
DISTRACTED DRIVING (Q23)	43%	38%	18%	2%	1.4
DISTRACTED CYCLING (Q4B)	22%	44%	25%	9%	1.4
DISTRACTED WALKING (Q4D)	8%	44%	39%	10%	2.0

The index is respondent level mean/average based on the statements answered.

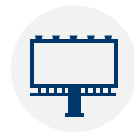
ROAD SAFETY ADVERTISING



OVERALL RECALL – *Recall is down compared to 2015; if spend has been consistent, creative may show signs of wear out or may need more digital emphasis. Only ads about drug use and driving are up year over year.*

- Awareness of social marketing ads about road safety has declined since 2015. The decline is focused mostly on traditional media such as TV, newspapers and magazines; whereas recall for outdoor ads, social media, online ads are up directionally. There has also been a decline in recall of several notable campaigns including LBCO, MADD and the Seatbelt Campaign.
- Compared to past years, the ads recalled this year appear to have directionally greater stated impact on young male drivers, novice drivers and motorists age 25-55 than two years ago – closer to the higher level of impact observed in 2013.
- As in the past, the vast majority of those who recall road safety ads state it had at least a somewhat positive impact on their driving, however there is little evidence in this survey that these ads impact driving behaviour. On this point, we found that attitudes correlate with behaviour and thus, the more dangerous someone believes a behaviour to be the less likely they are to engage in it. Advertising can be effective in improving behaviours by trying to build knowledge and correcting attitudes. The survey found that a greater proportion who recall cell phone/driving ads and impaired driving ads viewed these acts as dangerous compared to those who did not recall the ads.

IMPACT OF ADS ON DRIVING BEHAVIOUR



There is little evidence that recall of advertising has a positive DIRECT impact on behaviour.

RECALL ADVERTISING ABOUT 'CELL PHONE USE WHILE DRIVING'

Yes (A)

No (B)

Distracted Driving Behaviour Index

% Who admit to doing each activity frequently/ occasionally		
Read or sent text messages while stopped at a traffic light	27% B	20%
Read or sent text messages while slowed or stopped in traffic	19%	15%
Held a cell phone/ to talk in speaker phone mode (not hands – free) while driving	17%	14%
Read or sent text messages while driving	9%	8%
Held a cell phone to your ear while talking and driving	7%	5%
Used a cell phone to call 911 to report a high-risk or impaired driver while driving	7%	5%

RECALL ADVERTISING ABOUT 'IMPAIRED DRIVING'

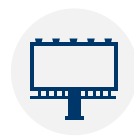
Yes (A)

No (B)

% Who admit to doing each activity (e.g. not never) before driving

Taking drugs for recreational purposes	8%	8%
Three or more drinks	15%	14%
Using marijuana	12%	10%
Taking Rx or OTC meds that indicates it can affect your ability to drive	29%	27%
One or two drinks	46%	41%

IMPACT OF ADS ON DRIVING ATTITUDES



There is evidence that recall of advertising has a positive impact on attitudes and knowledge.

RECALL ADVERTISING ABOUT 'CELL PHONE USE WHILE DRIVING'

YES (A) No (B)

Attitudes Toward Distracted Driving

% Who consider these behaviours 'extremely dangerous'

Driving while sending or reading a text message	78%	74%
Driving while using a hand-held cell phone or smart phone	73%B	65%

Believe it is a punishable/ticketable offence

% Who say yes

Holding a cell phone to talk in speaker phone mode (not hands-free) while driving	86%B	74%
Reading or writing text messages while stopped at a traffic light	86%B	74%

RECALL ADVERTISING ABOUT 'IMPAIRED DRIVING'

Yes (A) No (B)

% Who consider these behaviours 'extremely dangerous'

Driving after using marijuana	64%B	55%
Driving after taking drugs for recreational purposes (such as cocaine, ecstasy or methamphetamines etc.)	84%B	78%
Driving after taking prescription or over-the-counter medication that indicates it can affect your ability to drive (such as Nyquil, Benadryl, etc.)	46%	43%

CHANNELS AND AUTOMATED VEHICLES



EFFECTIVE CHANNELS - *Digital media is perceived to be nearly as effective as traditional channels, more so among younger Ontarians*

- Perhaps not surprisingly, given senior drivers report the highest recall of advertising on road safety, they are also most likely to believe TV is the most effective channel for this information. Young male drivers and Drivers 25-55 are nearly as likely to say YouTube is effective as TV, radio and outdoor ads. Novice drivers prefer channels like YouTube, indoor posters or other online advertising, while Cyclists lean towards Instagram or electronic mailouts.
- Young male drivers, Novice drivers, Drivers 25-55 and Cyclists are more likely than average to text on a daily or almost daily basis but less likely to watch TV. Young male drivers and Novice drivers are also more likely to watch TV shows or videos, listen to music online or use Instagram.

AUTOMATED VEHICLES - *Knowledge remains low, but comfort with the idea is rising*

- While a majority of Ontarians feel familiar with the term automated vehicle, knowledge is soft and only a minority feel particularly comfortable with the concept. Familiarity has increased since 2015 among young male drivers, cyclists and motorcyclists, but not the average Ontarian. Most are undecided about partial capabilities, but the percentage who are comfortable with it has increased since 2015.

KEY DIFFERENCES BY TARGET GROUP



YOUNG MALE DRIVERS



SENIOR DRIVERS



NOVICE DRIVERS



BEHAVIOURS

Engage in more distracted, impaired or aggressive behaviours

Engage in fewer distracted, impaired or aggressive behaviours

Engage in more distracted walking behaviour

ATTITUDES

Less likely to think distracted, impaired or aggressive behaviours are dangerous

More likely to think distracted, impaired or aggressive behaviours are dangerous
Less likely to think roads are safe for vulnerable users

Less likely to think distracted cycling or walking behaviours are dangerous
More likely to think roads are safe for pedestrians
Less likely to want cyclists on the roads

AWARENESS

Higher recall of road safety ads and more familiar with automated vehicles
Less aware of slow down and move over procedures

Higher knowledge of BAC levels and slow down and move over procedures
Lower recall of online ads and less comfortable with automated vehicles

Lower recall of road safety ads and less likely to say the campaigns have impacted on their driving.
Less aware of slow down and move over procedures

KEY DIFFERENCES BY TARGET GROUP



DRIVERS 25-55



CYCLISTS



MOTORCYCLISTS 25-64



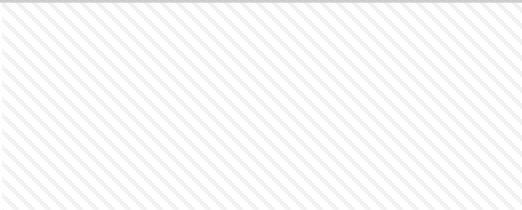
BEHAVIOURS

More likely to walk and text or talk on the phone

Engage in more distracted walking or some impaired driving behaviours

Engage in more distracted walking or impaired driving behaviour

ATTITUDES



More likely to think the roads are safe and less likely to think distracted cycling behaviours are dangerous

More likely to think the roads are safe and less likely to think distracted cycling or behaviours are dangerous
Less likely to want cyclists on the roads

AWARENESS

Lower recall of road safety ads but higher recall of MADD campaign
Less aware of slow down and move over procedures

Higher recall of the Road Safety Challenge and more familiar with automated vehicles
Less aware of slow down and move over procedures

Higher recall of road safety ads
Lower knowledge of BAC levels, slow down and move over procedures and less familiar with automated vehicles

KEY DIFFERENCES BY DEMOGRAPHIC SUBGROUP



	AGE	GENDER	REGION
BEHAVIOURS	Younger Ontarians are more likely to engage in distracted driving behaviour despite driving less than Older Ontarians	Males are more likely to bike, drive an ATV, rollerblade/ skateboard or ride a motorcycle and more likely to engage in distracted or impaired driving	Residents of the GTA 416 are more likely to bike, drive an ATV, rollerblade/ skateboard or ride a motorcycle and more likely to engage in distracted driving. Residents of Northern Ontario are also more likely to drive an ATV.
ATTITUDES	Younger Ontarians are more likely to think the roads are safe, while Older Ontarians are more likely to think distracted, impaired or aggressive behaviours are dangerous and on the rise	Males are more likely to think the roads are safe, while females are more likely to think distracted, impaired or aggressive behaviours are dangerous and on the rise	Those from the GTA 416 are more likely to think the roads are safe. Residents of SW Ontario are less likely to think distracted pedestrian behaviour is dangerous.
AWARENESS	Older Ontarians have more accurate knowledge of BAC. Younger Ontarians are more familiar with automated vehicles	Males are more familiar with automated vehicles and to feel comfortable with them	Knowledge of proper BAC is lower among those in the GTA

CONCLUSIONS



- Fewer motorists feel safe on Ontario's roads— pedestrians and cyclists specifically also feel less safe. There is a greater acceptance of cyclists on the roads and agreement that special precautions needs to be taken to protect them.
- There is evidence that social shame/public intolerance for distracted and impaired driving has increased. The public are more likely to feel these behaviours are dangerous, and while many are concerned that these behaviours (such as texting and driving or impaired driving) continue to be more common than in the past, they may be *perceived* to be improving. Compared to two years ago, fewer personally admit to distracted driving.
- And, yet as passengers, presumably most often in the company of someone they know, a greater proportion admit to having travelled with a driver who is texting and with someone under the influence of alcohol.
- Perhaps related to recent discussions of legalization of recreational cannabis and the implications for law enforcement, fewer Ontarians report feeling confident in the ability of the police to identify drug impaired drivers.
- Future road safety advertising should prioritize digital channels and outdoor ads over traditional channels as it does a better job of resonating with the young and riskier segments of the population.
- There is evidence that existing campaigns may be reaching the point of wear out – with diminishing impact. New creative should focus on changing attitudes as much as changing behaviour as the impact on behaviour is indirect through changing attitudes – people need to believe the risk/danger, not just be told what not to do. Young male drivers, Cyclists, Motorcyclists 25-64 and Novice drivers should be included as targets for future campaigns given their less cautious views.

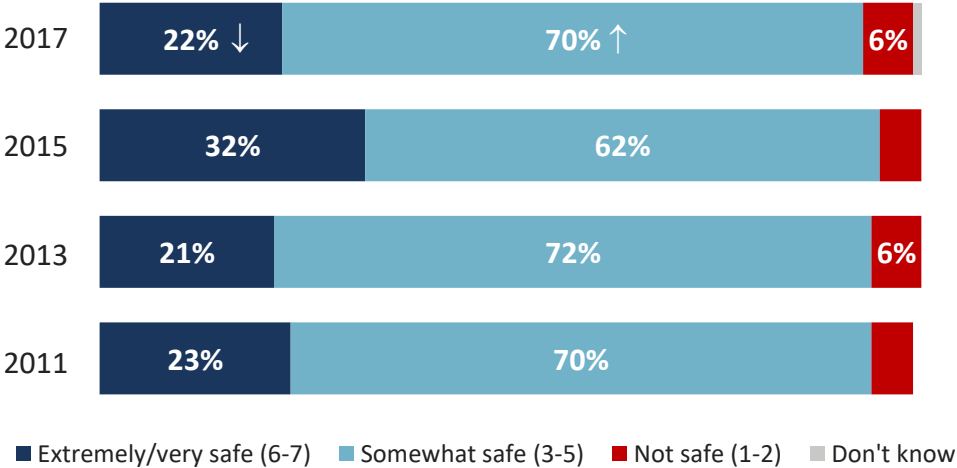


GENERAL ROAD SAFETY

LEVEL OF SAFETY ON ONTARIO'S ROADS



Overall, 92% of Ontarians consider Ontario's roads to be safe including 22% who feel Ontario's roads are extremely safe. In 2015 there was a spike in 'extremely/very safe' ratings that has now returned to previously recorded levels.



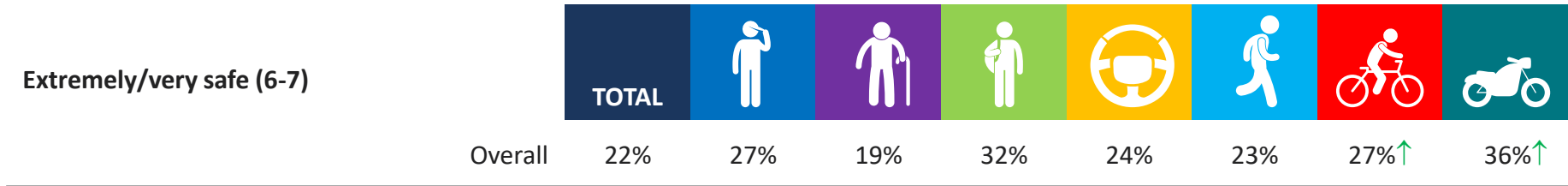
Data 2% or less not labelled

Q2. Overall, how would you rate the level of safety on Ontario's roads? Please think of all road users (drivers, cyclists, pedestrians, etc.).
Base: All respondents 2017 (n=1431); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

LEVEL OF SAFETY ON ONTARIO'S ROADS



Perceptions of the level of safety are generally consistent among the MTO's target segments of interest with two segments being more optimistic than average. A higher than average proportion of Motorcyclists age 25 to 65 and Cyclists consider Ontario's roads to be very safe.

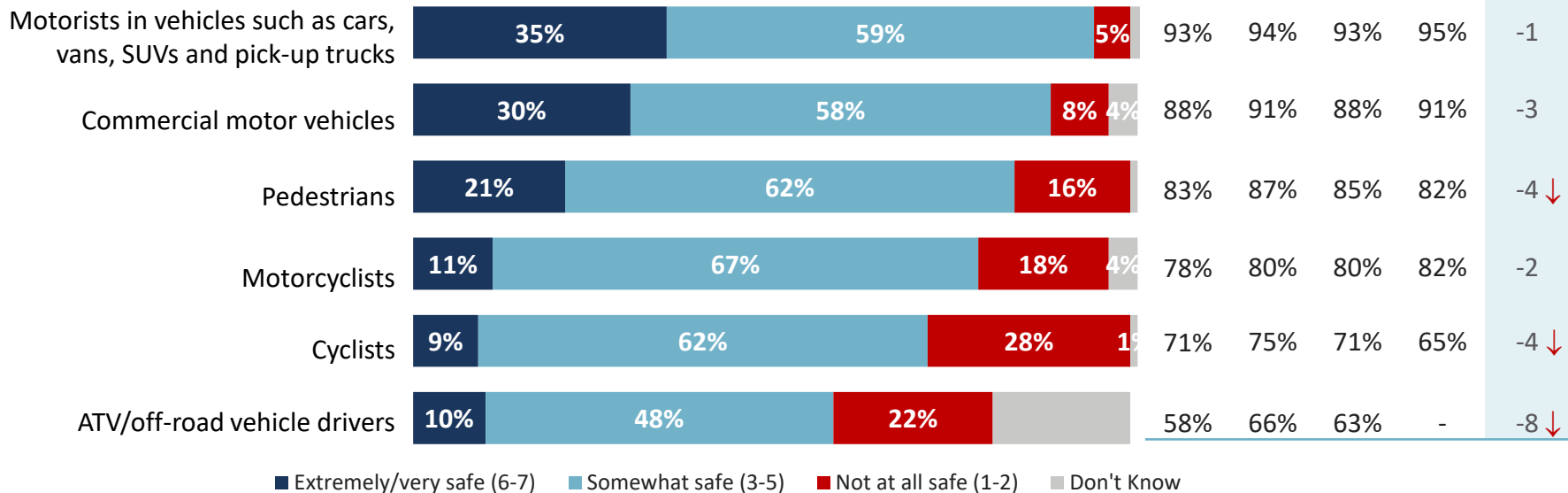


Q2. Overall, how would you rate the level of safety on Ontario's roads? Please think of all road users (drivers, cyclists, pedestrians, etc.).
Base: 2017 target segments (n=varies)

ROAD SAFETY FOR VARIOUS USERS



The vast majority of Ontarians continue to feel that the province's roads are safe for motorists (94%) and commercial motor vehicles (88%), most of which say roads are somewhat safe. Closer to eight in ten feel the roads are safe for pedestrians (83%) or motorcyclists (78%), and fewer say roads are safe for cyclists (71%) or off-road vehicles (58%). Compared to 2015, Ontarians feel that roads are less safe for pedestrians, cyclists and off-road vehicles drivers and fewer feel motorists are extremely/ very safe.



Data 2% or less not labelled

Q3. How safe would you say Ontario's roads are for each of the following?
 Base: All respondents 2017 (n=1321-1341); 2015 (n=936); 2013 (n=1006); 2011 (n=1096)

ROAD SAFETY FOR VARIOUS USERS



Motorcyclists age 25-65 feel more safe than non-motorcyclists think they are, but still only 22% feel extremely or very safe. A similar trend exists among cyclists, but they feel less safe overall. Young male drivers and Novice drivers are more likely to feel Ontario's roads are safe for pedestrians while Motorcyclists age 25 to 65 are more likely to feel it is at least somewhat safe for off-road vehicle drivers. Seniors are less likely to feel Ontario's roads are safe for pedestrians, motorcyclists or cyclists.

Extremely/Somewhat safe (3-7)	TOTAL							
Motorists in vehicles such as cars, vans, SUVs and pick-up trucks	93%	95%	93%	95%	95%	93%	94%	91%
Commercial motor vehicles	88%	90%	85%	91%	89%	88%	89%	88%
Pedestrians	83%	90% ↑	76% ↓	96% ↑	86%	83%	86%	84%
Motorcyclists	78%	80%	71% ↓	88%	78%	78%	79%	81%
ATV/off-road vehicle drivers	58%	61%	53%	52%	58%	59%	60%	71% ↑
Cyclists	71%	76%	59% ↓	77%	72%	71%	75%	76%

Q3. How safe would you say Ontario's roads are for each of the following?
Base: 2017 target segments (n=varies)

11% feel very/extremely safe
vs. 6% of non-cyclists.

22% feel very/extremely safe
vs. 10% of non-motorcyclists.

ATTITUDES - GENERAL



Consistent with 2015, nearly nine in ten (88%) Ontarians believe they endanger others when they don't obey the rules, however only half as many (44%) feel that most drivers in Ontario obey proper road safety rules. Nearly two-thirds (62%) think that young drivers have a higher rate of collision than older drivers, while almost half (46%) feel that senior drivers have a higher rate of collision than non-seniors.

If I don't obey the rules of the road,
my behaviour will endanger others



Young drivers have a higher rate of
collision than older drivers



Senior drivers have a higher rate of
collision than non-seniors



Most drivers in Ontario obey proper
road safety practices



■ Agree (5-7) ■ Neither (4) ■ Disagree (1-3) ■ Don't know

Agree (5-7)					
2017	2015	2013	2011	Δ 2015/ 2017	
88%	85%	88%	-	+3	If I don't obey the rules of the road, my behaviour will endanger others
62%	62%	-	-	=	Young drivers have a higher rate of collision than older drivers
46%	48%	45%	-	-2	Senior drivers have a higher rate of collision than non-seniors
44%	46%	45%	-	-2	Most drivers in Ontario obey proper road safety practices

Data 2% or less not labeled

Q5/Q6. To what extent do you agree or disagree with the following statements?

Base: All respondents 2017 Q5 (n=1310)/Q6 (n=1335); 2015 (n=934); 2013 (n=1006); 2011 (n=1096)

ATTITUDES - GENERAL



Senior drivers are more likely to feel that if they don't obey the rules their behaviour will endanger others, while Young male drivers and Novice drivers are less likely. Young male drivers, Drivers 25-55 and Cyclists are more likely to think that senior drivers have a higher accident rate than non-seniors, while Senior drivers are less likely. Young male drivers and Motorcyclists 25-64 are more likely to think that most drivers in Ontario obey proper road safety practices.

Agree (5-7)

	TOTAL							
If I don't obey the rules of the road, my behaviour will endanger others.	88%	78% ↓	92% ↑	74% ↓	88%	88%	88%	82%
Young drivers have a higher rate of collision than older drivers.	62%	65%	68%	58%	66%	62%	62%	66%
Senior drivers have a higher rate of collision than non-seniors.	46%	59% ↑	34% ↓	59%	51% ↑	46%	51% ↑	52%
Most drivers in Ontario obey proper road safety practices.	44%	53% ↑	47%	56%	44%	44%	46%	60% ↑

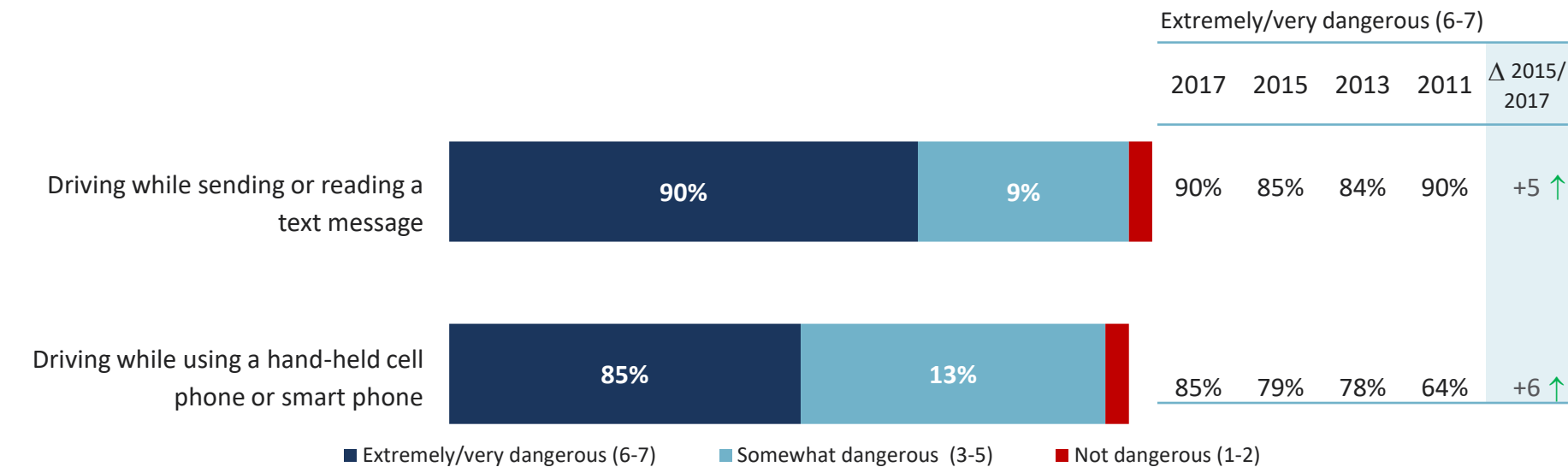


DISTRACTED DRIVING

ATTITUDES – DISTRACTED DRIVING



The vast majority of Ontarians feel it is very dangerous to send/ read a text message or to use a hand-held phone while driving and perceptions of the dangers of these distractions have increased since 2015.



Data 2% or less not labeled

Q4. In your view, how dangerous are each of the following in terms of road safety?
Base: All respondents 2017 (n=1304-1311); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096))

ATTITUDES – DISTRACTED DRIVING



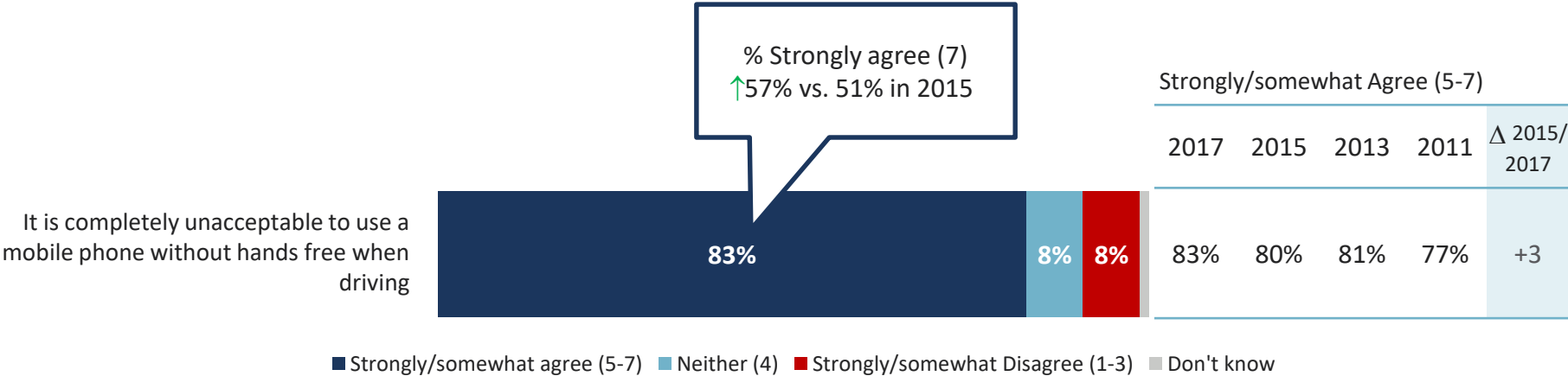
Senior drivers are more likely to feel phone-related distracted driving behaviours are dangerous, while Young male drivers are less likely.

Extremely/very dangerous (5-7)	TOTAL							
Driving while sending or reading a text message	90%	76% ↓	96% ↑	86%	89%	90%	88%	81%
Driving while using a hand-held cell phone or smart phone	85%	72% ↓	95% ↑	74%	83%	86%	81%	80%

ATTITUDES – DISTRACTED DRIVING



The vast majority of Ontarians feel it is completely unacceptable to use a mobile phone without a hands free device when driving. The percent who strongly agree with this has increased significantly from 2015 to 57% up from 51%.



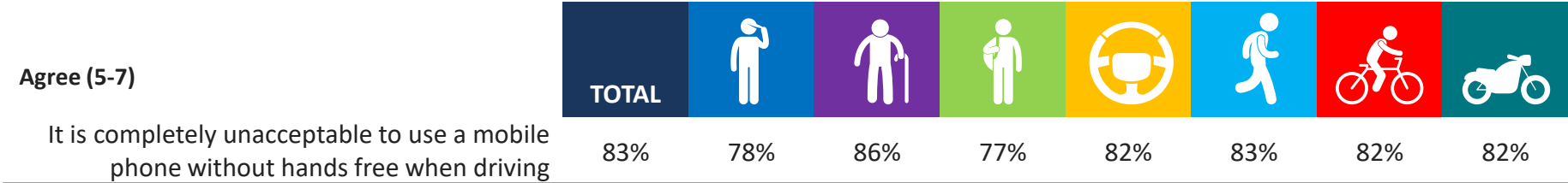
Data 2% or less not labeled

Q6. To what extent do you agree or disagree with the following statements?
Base: All respondents 2017 (n=1348); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – DISTRACTED DRIVING



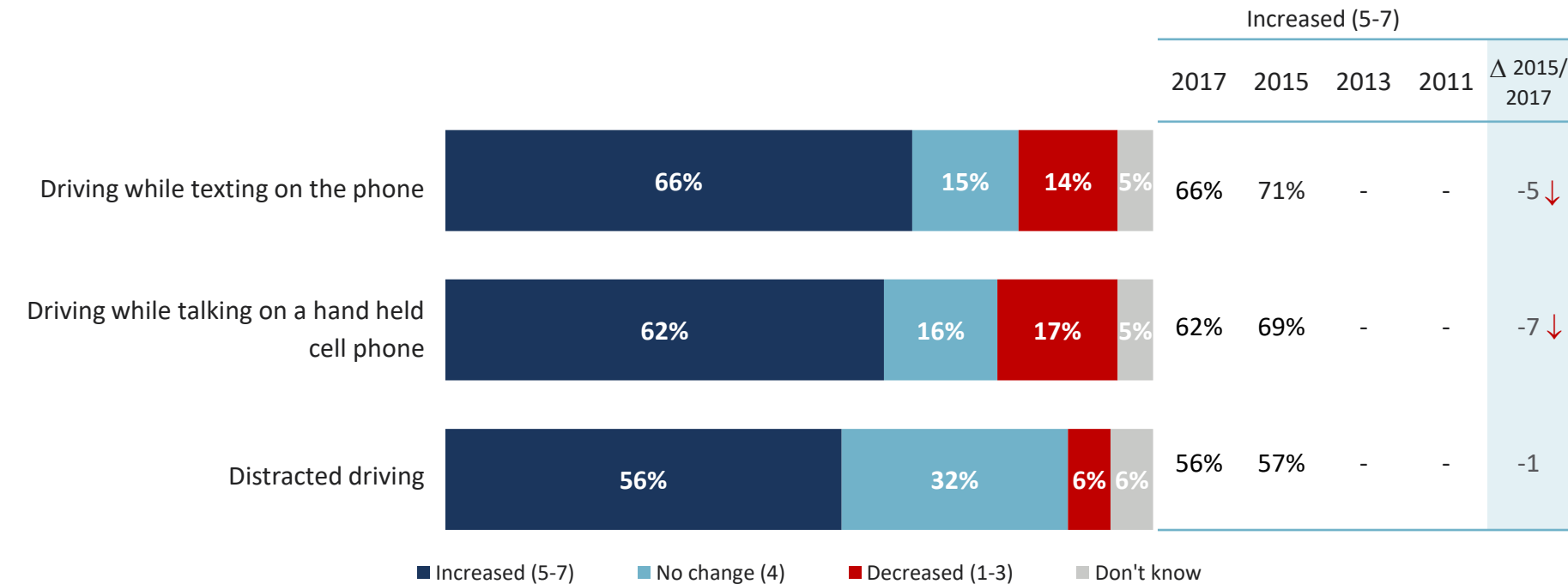
Conviction that it is completely unacceptable to use a mobile phone without a hands free device is consistent across all segment groups.



ATTITUDES – DISTRACTED DRIVING



Most Ontarians continue to believe that distracted driving and in particular texting or talking on a hand held phone while driving has increased over the past 5 years, however they are less likely to think so than in 2015.










Q13. In your opinion, have the following decreased or increased over the past five years?
Base: All respondents 2017 (n=1231-1334); 2015 (n=1010)

ATTITUDES – DISTRACTED DRIVING



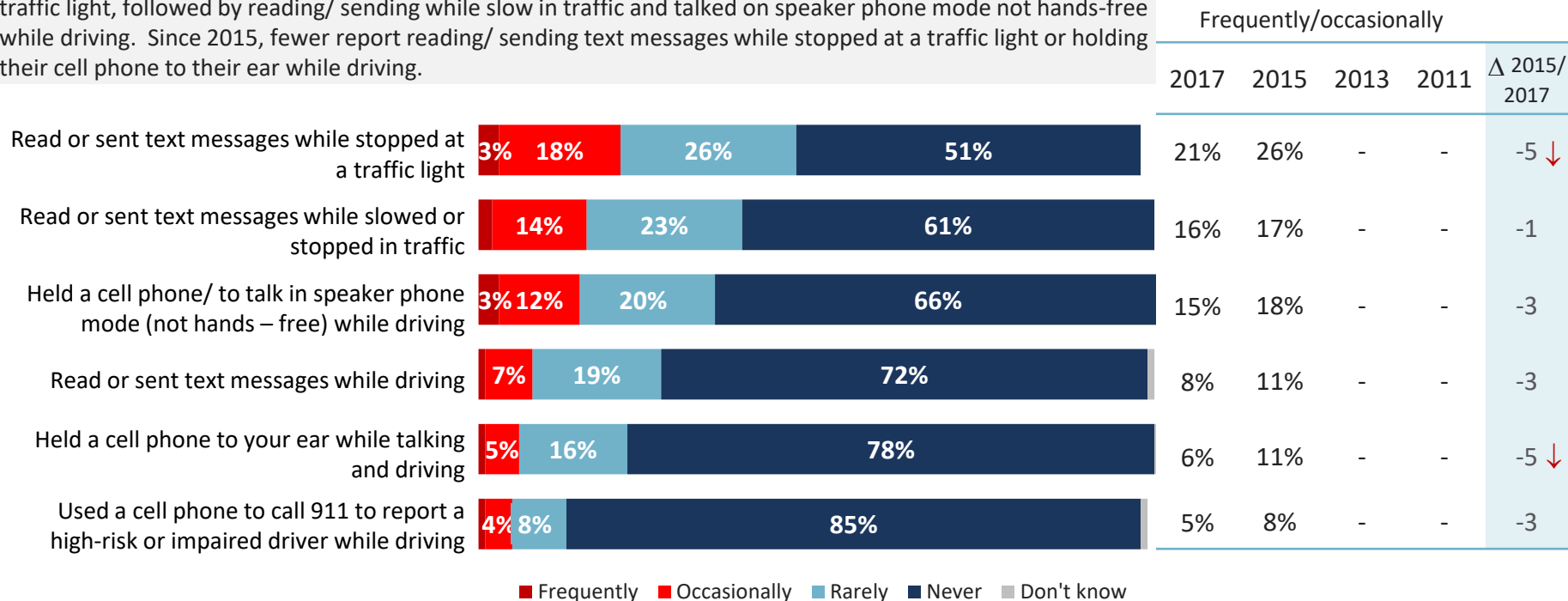
Senior drivers are more likely to believe that driving while texting or talking on a hand held phone has increased over the past 5 years, while Novice drivers are more likely to feel distracted driving in general has increased. Young male drivers are less likely to feel each activity has increased in the past 5 years.

Increased (5-7)	TOTAL							
Driving while texting on the phone	66%	51% ↓	74% ↑	75%	65%	67%	67%	64%
Driving while talking on a hand held cell phone	62%	48% ↓	75% ↑	55%	60%	62%	62%	64%
Distracted driving	56%	46% ↓	62%	73% ↑	54%	56%	56%	59%

BEHAVIOUR – DISTRACTED DRIVING



Fewer than half of Ontarians have ever engaged in each distracted driving behaviour in the past 12 months and very few do so frequently. Ontarians are most likely to report reading/ sending text messages while stopped at a traffic light, followed by reading/ sending while slow in traffic and talked on speaker phone mode not hands-free while driving. Since 2015, fewer report reading/ sending text messages while stopped at a traffic light or holding their cell phone to their ear while driving.



Data 2% or less not labelled

Q23. In the past 12 months, how often have you done any of the following while driving?
 Base: 2017 (n=1073-1089); 2015 (n=797-804)

BEHAVIOUR – DISTRACTED DRIVING










Young male drivers or Motorcyclists 25-64 are more likely to engage in all distracted driving behaviours, while Senior drivers are less likely than average. Drivers 25-55 are more likely to report having read or sent a text message while stopped at a light or slowed in traffic.

Frequently/Occasionally	TOTAL							
Read or sent text messages while stopped at a traffic light	21%	38% ↑	2% ↓	29%	27% ↑	21%	23%	36% ↑
Read or sent text messages while slowed or stopped in traffic	16%	24% ↑	3% ↓	16%	20% ↑	16%	18%	28% ↑
Held a cell phone/ to talk in speaker phone mode (not hands – free) while driving	15%	27% ↑	2% ↓	19%	17%	15%	16%	27% ↑
Read or sent text messages while driving	8%	21% ↑	1% ↓	2%	10%	8%	9%	19% ↑
Held a cell phone to your ear while talking and driving	6%	12% ↑	2% ↓	9%	6%	6%	7%	17% ↑
Used a cell phone to call 911 to report a high-risk or impaired driver while driving	5%	12% ↑	2% ↓	9%	7%	5%	8% ↑	23% ↑

DISTRACTED DRIVING INDEX



Most Ontarians have either never engaged in distracted driving behaviour or rank low on the index, while nearly two in ten engage in a moderate degree of distracted driving and only 2% are considered high (engaging in multiple distracted behaviours at least occasionally if not frequently). Compared to 2015, fewer motorists are classified as high, while the proportion of the other groups remain consistent. Young male drivers and Motorcyclists 25-64 are more likely to engage in a moderate or higher degree of distracted driving, while Senior drivers are more likely to have never engaged in distracted driving behaviour.

	TOTAL							
	1167	139	291	43*	688	1131	569	137
Never (1)	43%	18% ↓	65% ↑	27% ↓	38%	42%	37%	29% ↓
Low (>1-<2)	38%	43%	31% ↓	44%	39%	39%	41%	29% ↓
Moderate (2-<3)	18%	35% ↑	4% ↓	27%	21%	18%	19%	33% ↑
High (3+)	2%	5%	- ↓	2%	2%	2%	4%	10% ↑
AVERAGE RATING	1.4	1.8	1.2	1.6	1.5	1.4	1.5	1.8

DISTRACTED DRIVING INDEX: Based on average rating of behaviours at Q23. Each activity is scored based on the response provided (1-Never, 4-Frequently), the respondents index score is the average rating of all activities. A higher rating means the respondent engages in more distracted driving behaviour. The average was calculated at the respondent level based on the statements answered.

Q23. In the past 12 months, how often have you done any of the following while driving?
Base: 20107 (n=1,069-1,089)

DISTRACTED DRIVING INDEX PROFILE



Motorists who engage in a higher degree of distracted driving behaviour are more likely to be male, to reside in the GTA 416 or to be under the age of 44 years old.

TOTAL	DISTRACTED DRIVING INDEX			
Average rating	Never	Low	Mod	High
1.4	1	>1-<2	2-<3	3+
% of population	43%	38%	18%	2%

	DISTRACTED DRIVING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Gender				
Men	50%	49%	53%	75% _{ABC}
Women	50% _D	51% _D	47% _D	25%

	DISTRACTED DRIVING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Age				
16-24	3%	10% _A	13% _A	14% _A
25-44	27%	41% _A	57% _{AB}	82%
45-64	54% _{BC}	42% _C	29%	4%
65+	15% _{BC}	7% _C	1%	-
Region				
Central	8%	8%	9%	5%
Southwest	27% _D	30% _D	24% _D	5%
North	9% _B	3%	5%	5%
East	13% _C	14% _C	8%	5%
GTA 905	23%	26%	36% _{AB}	23%
GTA 416	20%	20%	19%	57% _{ABC}

DISTRACTED DRIVING INDEX PROFILE



The more dangerous a motorist feels distracted driving behaviours are the less likely they are to have engaged in them.

	DISTRACTED DRIVING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Attitudes towards Dangerous Driving (% Very dangerous 6-7)				
Not reducing speed in poor driving conditions	89% BCD	81% CD	71%	54%
Driving after three or more drinks	93% CD	90% CD	84% D	58%
Not wearing a seatbelt while in the back seat of a vehicle	72% BCD	65% CD	55%	41%
Aggressive driving (including speeding, weaving in and out of traffic, following other cars too closely, etc.)	92% BCD	84% CD	67%	65%
Driving while using a hand-held cell phone or smart phone	92% BCD	84% CD	67%	65%
Driving while sending or reading a text message	97% BCD	89% C	78%	76%

BEHAVIOUR – AS A PASSENGER










A sizeable minority of Ontarians have experienced phone-related distracted driving as a passenger and are more likely to report having travelled with a driver who was texting than in 2015. Ontarians are most likely to report having travelled with a driver who was talking while holding a cell phone or feeling unsafe because a driver was using a cell phone or texting. Slightly fewer have asked a driver not to text or use their phone while driving or travelled with a driver who was texting.

		Yes				Δ 2015/ 2017
		2017	2015	2013	2011	
Travelled with a driver who was talking while holding a cell phone	41%	41%	41%	-	-	=
Felt unsafe because a driver was using a cell phone or texting	39%	39%	37%	-	-	+2
Asked a driver not to text or use their cell phone while driving	37%	37%	35%	-	-	+2
Travelled with a driver who was texting	35%	35%	30%	-	-	+5 ↑

BEHAVIOUR – AS A PASSENGER



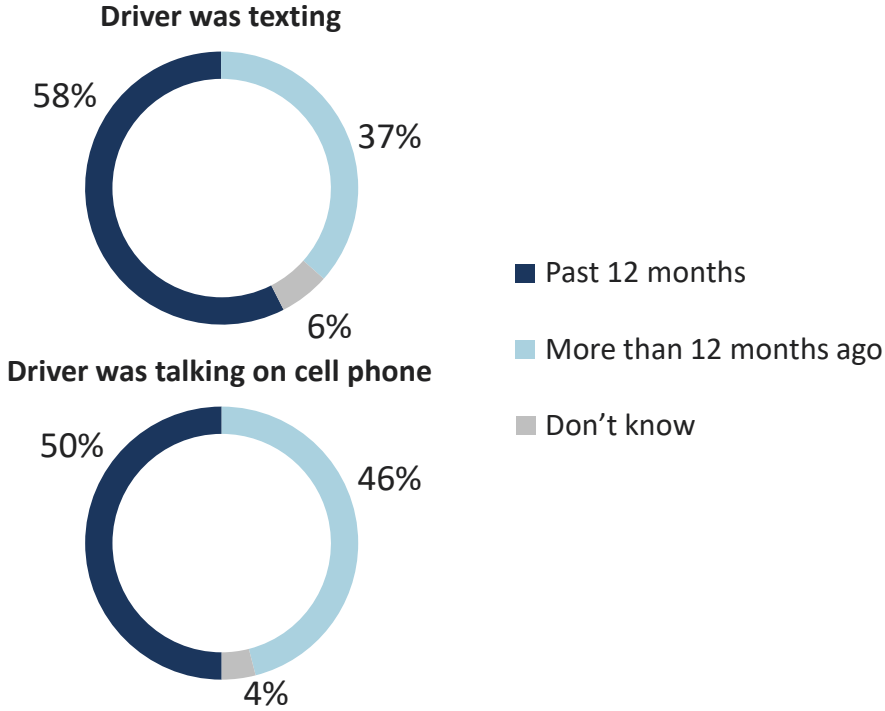
Young male drivers and Motorcyclists 25-64 are more likely to report having travelled with a driver who was texting. Motorcyclists 25-64 are also more likely to mention travelling with a driver who was talking while holding a cell phone. Cyclists are more likely to report having asked a driver not to text or use their cell phone while driving. Senior drivers are less likely to report having travelled with a driver who was talking while holding a cell phone or having asked a driver not to use their phone while driving.

Yes	TOTAL							
Travelled with a driver who was talking while holding a cell phone	41%	41%	30% ↓	37%	42%	41%	43%	52% ↑
Felt unsafe because a driver was using a cell phone or texting	39%	39%	36%	32%	39%	40%	43%	45%
Asked a driver not to text or use their cell phone while driving	37%	39%	28% ↓	49%	37%	38%	42% ↑	44%
Travelled with a driver who was texting	35%	48% ↑	20%	41%	38%	36%	40%	54% ↑

BEHAVIOUR – AS A PASSENGER



The majority of Ontarians who experienced phone-related distracted driving as a passenger indicate it happened in the past 12 months, consistent with previous years.



Past 12 months					
2017	2015	2013	2011		Δ 2015/2017
58%	63%	-	-		-5








Past 12 months					
2017	2015	2013	2011		Δ 2015/2017
50%	56%	-	-		-6

Q15B. You indicated you've had the following experiences. When did this most recently happen?
Base: 2017 (n=446-521); 2015 (n=120-350)

BEHAVIOUR – AS A PASSENGER



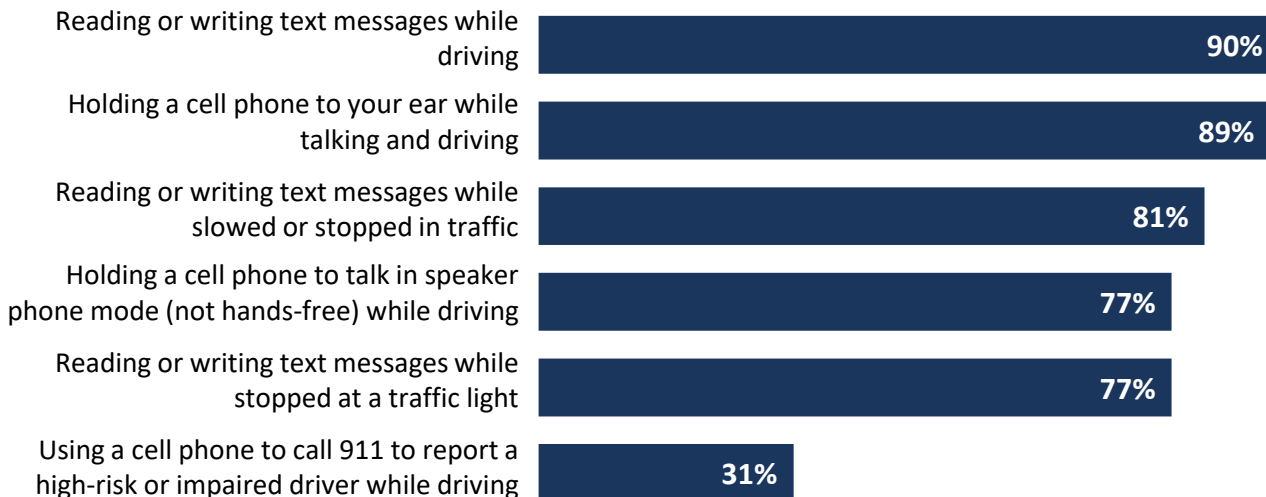
Young male drivers are more likely to indicate having travelled with a driver who was texting in the past 12 months, while Senior drivers are less likely. Novice drivers are more likely to have travelled with a driver who was talking on their cell phone in the same timeframe.

Past 12 months	TOTAL							
Travelled with a driver who was texting	58%	68% ↑	47% ↓	56%	60%	57%	60%	54%
Travelled with a driver who was talking on their cell phone	50%	57%	45%	73% ↑	50%	49%	53%	53%

KNOWLEDGE – DISTRACTED DRIVING



The vast majority of Ontarians are aware that each distracted driving behaviour is a ticketable offense, with the exception of using a cell phone to call 911 where most feel it is exempt. Since 2015, Ontarians are more likely to be aware that most actions are considered a ticketable offense.



Yes					
2017	2015	2013	2011	Δ 2015/2017	
90%	85%	-	-	+5	↑
89%	84%	-	-	+5	↑
81%	77%	-	-	+4	
77%	70%	-	-	+7	↑
77%	69%	-	-	+7	↑
31%	34%	-	-	-3	

KNOWLEDGE – DISTRACTED DRIVING



Senior drivers are more likely to believe that each action is a ticketable offense, while Motorcyclists 25-64 are less likely to believe so (except for using a cell phone to call 911). Young male drivers are less likely to believe that reading or writing text messages while driving or while stopped at a traffic light are ticketable offenses while Novice drivers are less likely to believe reading or writing text messages while slowed or stopped in traffic, holding a phone to talk in speaker phone mode or reading or writing text messages while stopped at a traffic light are ticketable.

Yes	TOTAL							
Reading or writing text messages while driving	90%	83% ↓	94% ↑	81%	89%	90%	88%	78% ↓
Holding a cell phone to your ear while talking and driving	89%	85%	94% ↑	81%	87%	89%	86%	74% ↓
Reading or writing text messages while slowed or stopped in traffic	81%	75%	86% ↑	62% ↓	83%	81%	79%	71% ↓
Holding a cell phone to talk in speaker phone mode (not hands-free) while driving	77%	71%	84% ↑	60% ↓	77%	77%	74%	69% ↓
Reading or writing text messages while stopped at a traffic light	77%	69% ↓	82% ↑	55% ↓	79%	77%	76%	64% ↓
Using a cell phone to call 911 to report a high-risk or impaired driver while driving	31%	32%	37% ↑	24%	32%	31%	33%	36%



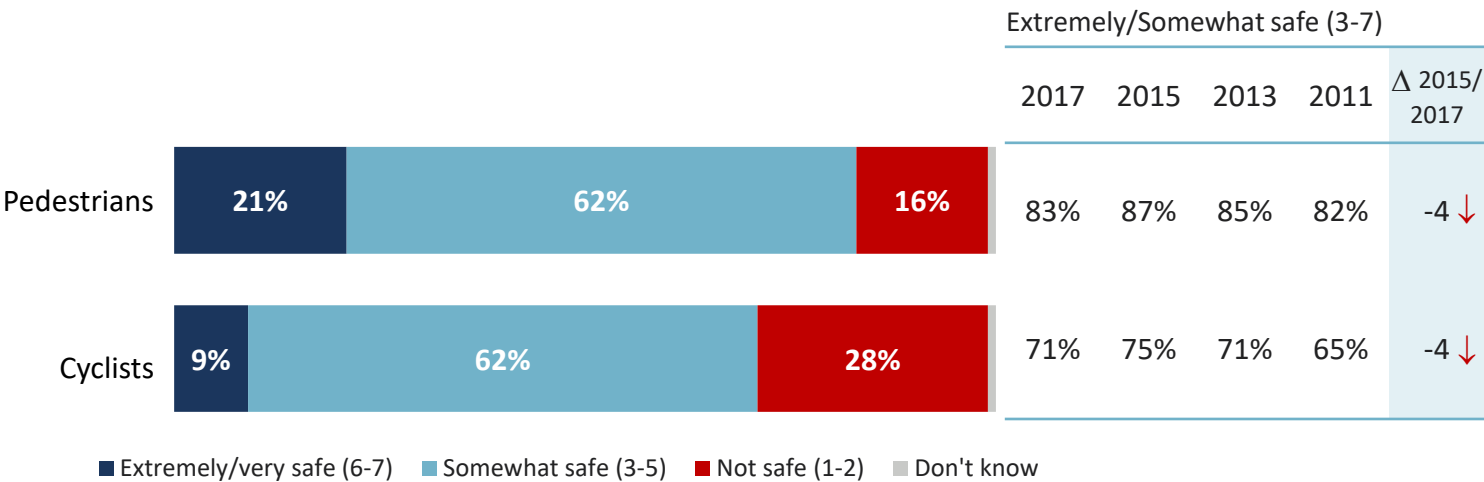
VULNERABLE ROAD USERS

(PEDESTRIANS, CYCLISTS)

ROAD SAFETY FOR VULNERABLE USERS



While a strong majority of Ontarians’ feel that the roads are at least somewhat safe for Pedestrians and Cyclists, more so Pedestrians than Cyclists, they think the roads are less safe for these groups than in 2015.

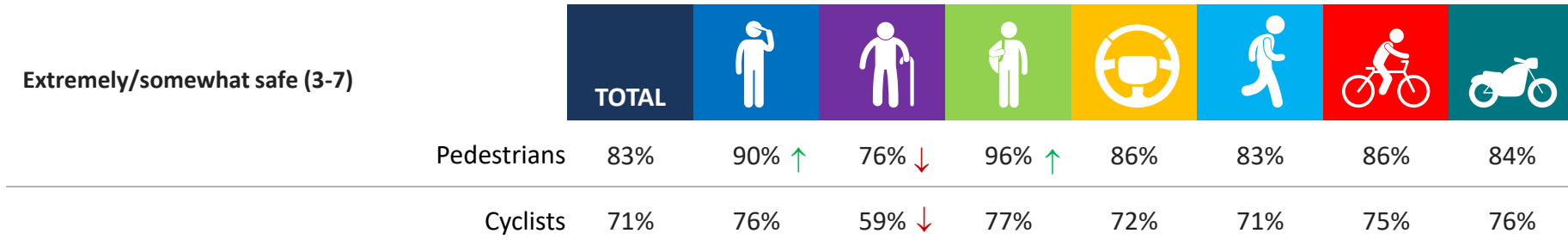


Data 2% or less not labelled

ROAD SAFETY FOR VULNERABLE USERS (BY SEGMENT)



Young male drivers and Novice drivers are more likely to feel Ontario’s roads are safe for pedestrians. Senior drivers are less likely to feel Ontario’s roads are safe for pedestrians or cyclists.

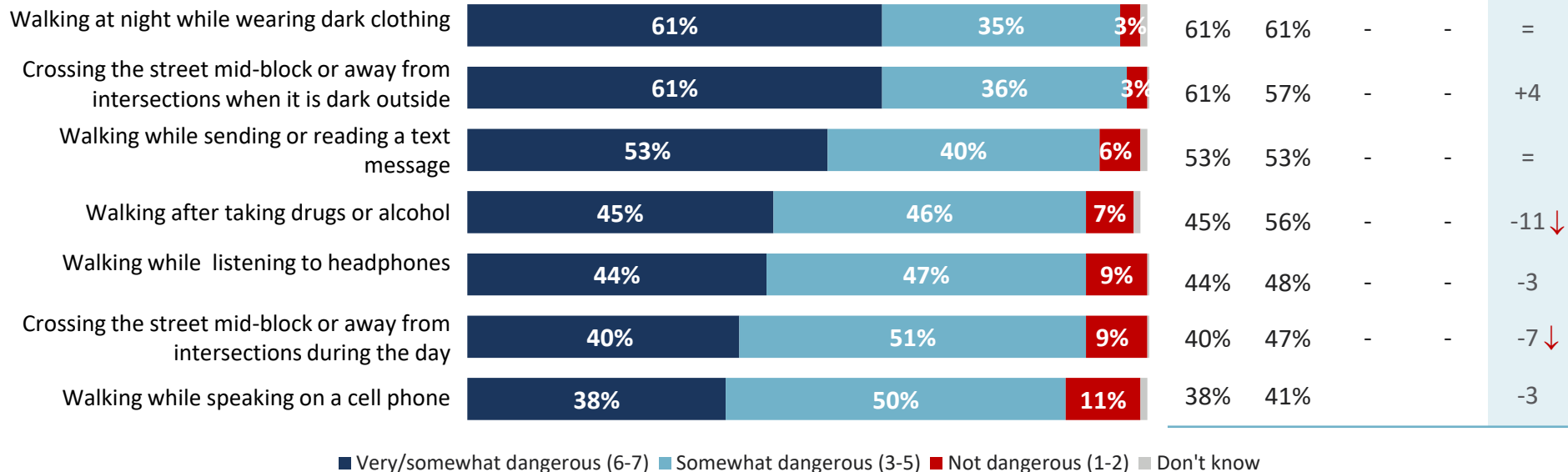


Q3. How safe would you say Ontario’s roads are for each of the following?
 Base: 2017 target segments (n=varies)

ATTITUDES – DANGER OF PEDESTRIAN ACTIONS



Ontarians are generally less likely to feel that distracted pedestrian behaviours are as dangerous as distracted driving or cycling behaviours. They are most likely to feel it is dangerous to walk at night wearing dark clothing or to cross the street mid-block when it is dark outside, while closer to half feel it is dangerous walking and sending/ reading a text. Compared to 2015, fewer feel it is dangerous to walk after taking drugs or alcohol or crossing the street mid-block during the day.










Q4a. Now thinking specifically about pedestrians, how dangerous are each of the following in terms of road safety?

Base: All respondents 2017 (n=1336-1350); 2015 (n=880-893); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – DANGER OF PEDESTRIAN ACTIONS



Senior drivers are more likely to find all pedestrian actions to be extremely/somewhat dangerous, particularly regarding walking at night while wearing dark clothing and walking while speaking on a cell phone. Young male drivers conversely, are less likely to find all pedestrian behaviours to be dangerous. Novice drivers do not feel walking while either listening to headphones or speaking on a cell phone are particularly dangerous. Cyclists view walking at night while wearing dark clothing or jay-walking during the day with less caution and are less likely to say these actions are dangerous.

Extremely/somewhat dangerous (6-7)	TOTAL							
Walking at night while wearing dark clothing	61%	43%↓	83%↑	51%	58%	61%	55%↓	53%
Crossing the street mid-block or away from intersections when it is dark outside	61%	42%↓	77%↑	59%	57%	61%	57%	53%
Walking while sending or reading a text message	53%	38%↓	68%↑	48%	53%	54%	49%	50%
Walking after taking drugs or alcohol	45%	33%↓	60%↑	32%	42%	45%	43%	44%
Walking while listening to headphones	44%	27%↓	60%↑	28%↓	43%	44%	41%	49%
Crossing the street mid-block or away from intersections during the day	40%	21%↓	56%↑	30%	37%	40%	35%↓	40%
Walking while speaking on a cell phone	38%	19%↓	55%↑	17%↓	34%	38%	35%	39%

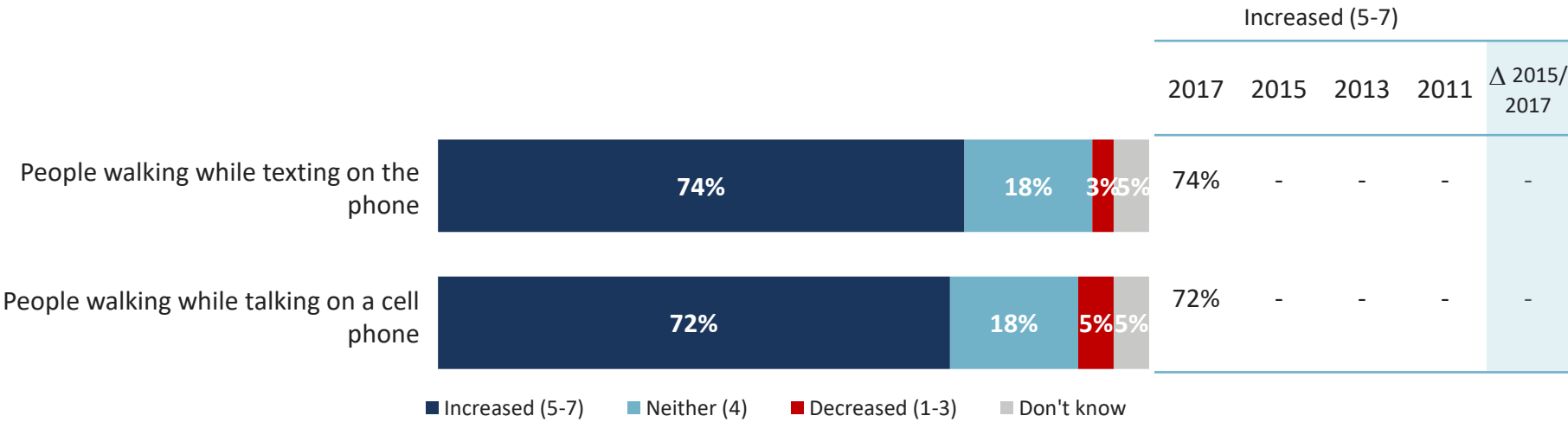
Q4a. Now thinking specifically about pedestrians, how dangerous are each of the following in terms of road safety?

Base: 2017 target segments (n=varies)

ATTITUDES – PEDESTRIAN DISTRACTION



A strong majority feel that distracted walking, either talking or texting on the phone, has increased over the past five years.

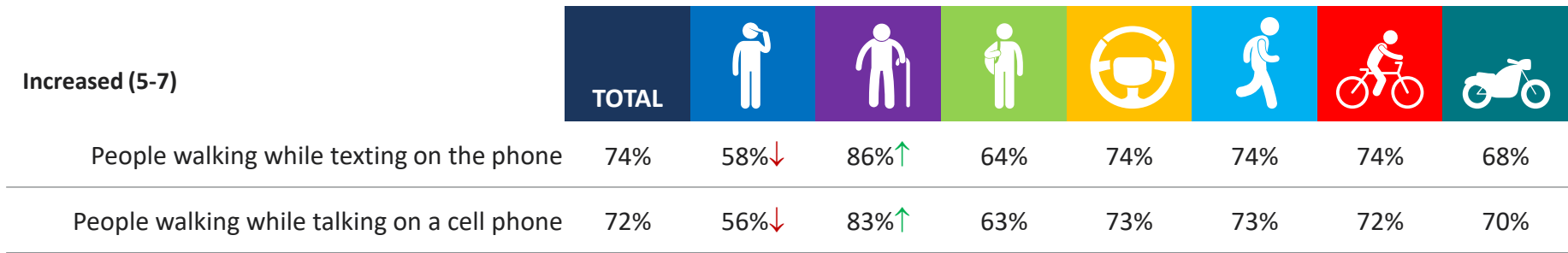


Q13. In your opinion, have the following decreased or increased over the past five years?
Base: All respondents 2017 (n=1326-1348)

ATTITUDES – PEDESTRIAN DISTRACTION



Similar to their views on the danger of pedestrian actions, Senior drivers are more likely to feel that the incidence of people walking while texting or talking on a cell phone has increased over the past five years whereas Young male drivers are more likely to hold the reverse opinion.



Q13. In your opinion, have the following decreased or increased over the past five years?
Base: 2017 target segments (n=varies)

ATTITUDES – DANGER OF CYCLIST ACTIONS



Ontarians tend to feel that distracted cycling behaviour is about as dangerous as distracted driving and more so than distracted pedestrian behaviour. They feel it is most dangerous to cycle while sending/ reading a text message, followed by cycling after taking drugs or alcohol, cycling at night while wearing dark clothing or while speaking on a cell phone. Compared to 2015, Ontarians are more likely to feel that cycling while sending or reading a text message or cycling without wearing a helmet is dangerous.

Very/somewhat dangerous (6-7)

2017	2015	2013	2011	Δ 2015/ 2017
85%	79%	-	-	+6%↑
78%	77%	-	-	+1%
76%	76%	-	-	=
76%	73%	-	-	+3%
68%	64%	-	-	+4%↑
65%	64%	-	-	+1%
65%	63%	-	-	+2%
48%	52%	-	-	-4%

■ Very/somewhat dangerous (6-7) ■ Somewhat dangerous (3-5) ■ Not dangerous (1-2)

Data 2% or less not labelled








Q4c. And now thinking specifically about cyclists, how dangerous are each of the following in terms of road safety?

Base: All respondents 2017 (n=1316-1347); 2015 (n=900-920)

ATTITUDES – DANGER OF CYCLIST ACTIONS



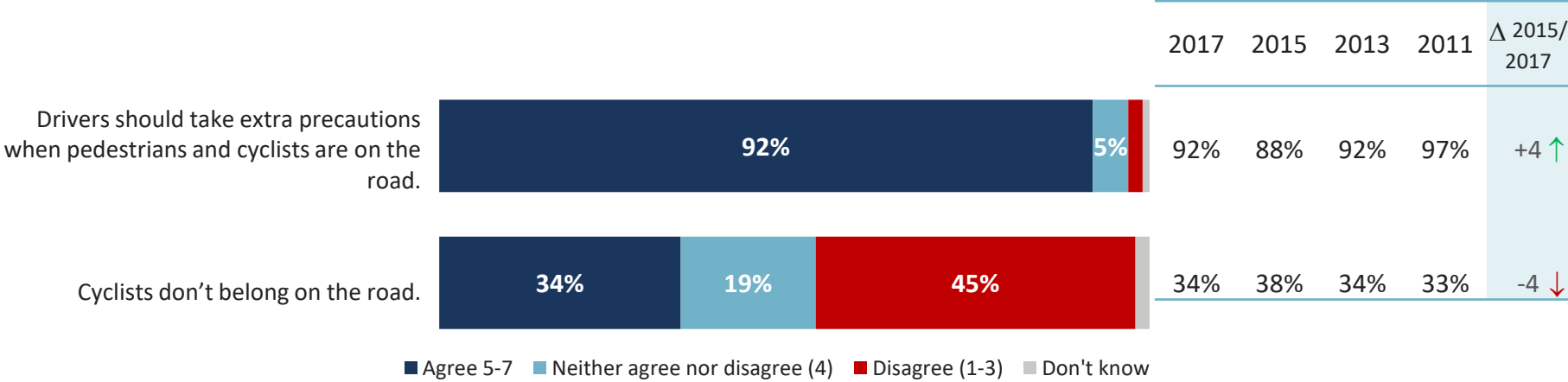
While most segments share comparable views regarding the danger of cyclist actions, Young male drivers are less likely to find all actions to be dangerous. Senior drivers are most likely to view all actions as dangerous especially in terms of actions when visibility is low. Both Cyclists and Motorcyclists are less likely to think cycling without a helmet is dangerous, the former group finds crossing streets mid-block in the dark or cycling while listening to headphones to be less dangerous. Motorcyclists are more lenient in terms of cycling after taking drugs or alcohol, riding at night in dark clothes or speaking on a cell.

Extremely/very dangerous (6-7)	TOTAL							
Cycling while sending or reading a text message	85%	67%↓	95%↑	76%	85%	85%	82%	74%
Cycling after taking drugs or alcohol	78%	69%↓	87%↑	70%	78%	78%	75%	69%↓
Cycling at night while wearing dark clothing	76%	60%↓	91%↑	65%	77%	77%	73%	68%↓
Cycling while speaking on a cell phone	76%	59%↓	88%↑	59%	75%	76%	72%	67%↓
Cycling without a helmet	68%	49%↓	80%↑	43%↓	66%	68%	62%↓	55%↓
Crossing the street mid-block or away from intersections when it is dark outside	65%	50%↓	82%↑	54%	63%	65%	60%↓	64%
Cycling while listening to headphones	65%	45%↓	77%↑	45%↓	67%	65%	60%↓	57%
Crossing the street mid-block or away from intersections during the day	48%	35%↓	58%↑	40%	47%	48%	44%	50%

ATTITUDES – CYCLISTS ON THE ROAD



The vast majority of Ontarians feel that drivers should take extra precautions when pedestrians and cyclists are on the road, while one-third are of the opinion that cyclists don't belong on the road ever. More Ontarians feel that drivers should take extra precautions around pedestrians and cyclists than in 2015, while fewer feel that that cyclists don't belong on the road.



Data <3% not labeled

Q5/Q6. To what extent do you agree or disagree with the following statements?
Base: All respondents 2017 (n=1308-1343); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – CYCLISTS ON THE ROAD



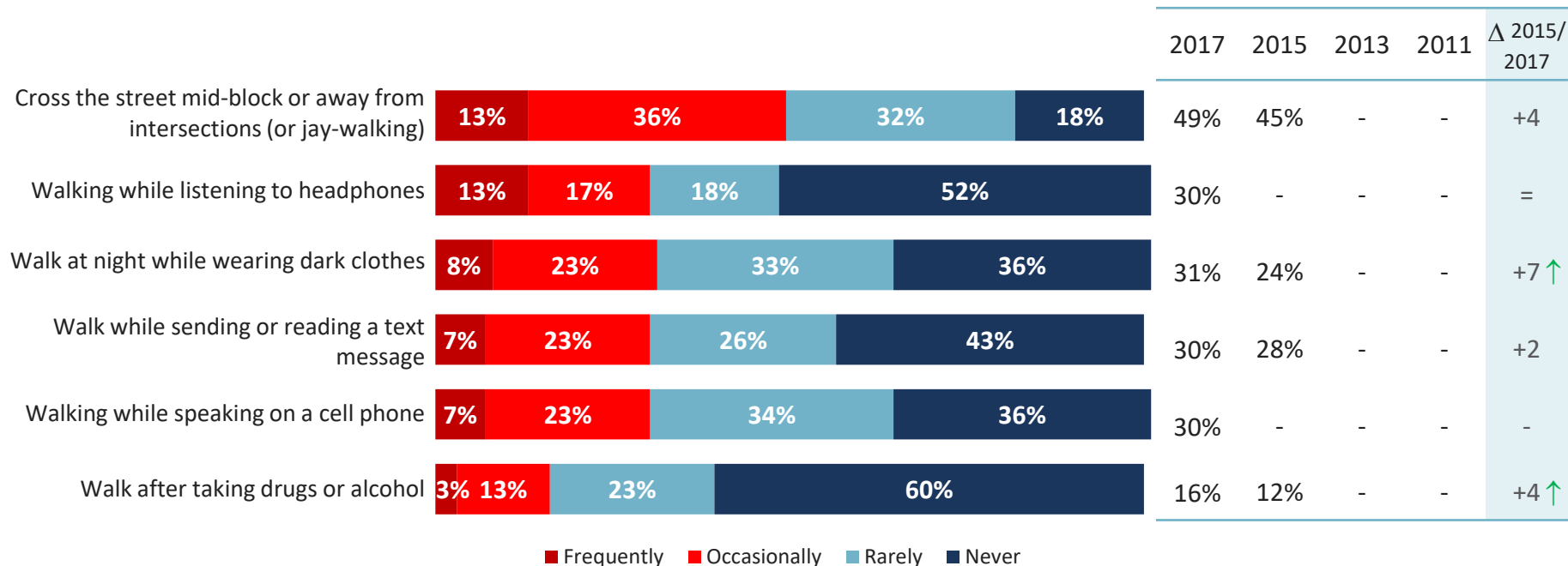
Young male drivers, Novice drivers and Motorcyclists are all more likely to agree that cyclists do not belong on the road. Most segments think that drivers should be more cautious when pedestrians and cyclists are on the road with no one group holding this belief any more strongly than others.

Top 3 Box – Agree	TOTAL							
Drivers should take extra precautions when pedestrians and cyclists are on the road.	92%	87%↓	94%	82%↓	92%	92%	91%	85%↓
Cyclists don't belong on the road.	34%	45%↑	27%↓	49%↑	38%	34%	34%	45%↑

PEDESTRIANS' BEHAVIOUR



Half report jay-walking at least occasionally, while three in ten or fewer engage in other distracted walking behaviour in the same frequency. Compared to 2015, there has been an increase in reported frequency of walking at night while wearing dark clothes or after taking drugs or alcohol.



PEDESTRIANS' BEHAVIOUR








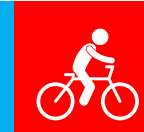
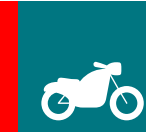
Senior drivers are less likely to walk at night while wearing dark clothes or to have engaged in any distracted pedestrian behaviour such as walking while listening to headphones, texting, or speaking on a cell phone. Distracted pedestrian actions are more likely to be reported among Young male drivers, Novice drivers, as well as Cyclists. Motorcyclists 25-64 have engaged in all activities frequently/occasionally aside from jay-walking.

Top 2 Box – Frequently/occasionally	TOTAL							
Cross the street mid-block or away from intersections (or jay-walking)	49%	48%	44%	46%	50%	49%	50%	49%
Walk at night while wearing dark clothes	31%	44%↑	14%↓	37%	32%	31%	33%	44%↑
Walking while listening to headphones	30%	42%↑	8%↓	53%↑	31%	30%	38%↑	47%↑
Walk while sending or reading a text message	30%	59%↑	3%↓	54%↑	38%↑	30%	37%↑	47%↑
Walking while speaking on a cell phone	30%	44%↑	9%↓	51%↑	36%↑	30%	36%↑	46%↑
Walk after taking drugs or alcohol	16%	20%	12%	18%	17%	16%	19%	31%↑

DISTRACTED WALKING INDEX



At more than four in ten (44%), the largest proportion of pedestrians have engaged in a low degree of distracted walking behaviour, followed by four in ten who have engaged in a moderate degree (39%). One in ten (8%) are considered to have engaged in a high degree of distracted walking behaviour and a similar proportion report having never done so (10%). Young male drivers are more likely to engage in a moderate degree of distracted walking while Motorcyclists 25-64 are more likely to engage in a high degree. Senior drivers are more likely to have never engaged in distracted walking.

	TOTAL							
	1104	110	230	39*	512	1104	554	113
Never (1)	8%	1% ↓	17% ↑	5%	5%	8%	6%	8%
Low (>1-<2)	44%	24% ↓	66% ↑	20% ↓	38%	44%	38%	23% ↓
Moderate (2-<3)	39%	64% ↑	15% ↓	62% ↑	45%	39%	43%	42%
High (3+)	10%	11%	2% ↓	13%	12%	10%	14%	27% ↑
AVERAGE RATING	2.0	2.3	1.5	2.3	2.1	2.0	2.1	2.3

DISTRACTED WALKING INDEX: Based on average rating of behaviours at Q4b. Each activity is scored based on the response provided (1-Never, 4-Frequently), the respondents index score is the average rating of all activities. A higher rating means the respondent engages in more distracted walking behaviour.

DISTRACTED WALKING INDEX PROFILE



Pedestrians who engage in a higher degree of distracted walking behaviour are more likely to be male, to reside in the GTA 416 or to be under the age of 44 years old.

TOTAL	DISTRACTED WALKING INDEX			
Average rating	Never	Low	Mod	High
2.0	1	>1-<2	2-<3	3+
% of population	8%	44%	39%	10%

	DISTRACTED WALKING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Gender				
Men	33%	47% _A	55% _{AB}	56% _A
Women	67% _{BCD}	53% _C	45%	44%

	DISTRACTED WALKING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Age				
16-24	4%	5%	16% _{AB}	17% _{AB}
25-44	16%	28% _A	50% _{AB}	54% _{AB}
45-64	51% _{CD}	54% _{CD}	32%	27%
65+	30% _{BCD}	13% _{CD}	3%	1%
Region				
Central	7%	10%	7%	5%
Southwest	29%	25%	29%	23%
North	11% _C	6%	5%	5%
East	14%	13%	14%	8%
GTA 905	19%	26%	24% _{AB}	27%
GTA 416	20%	20%	21%	33% _{ABC}

Q4b. Now thinking about your own behaviour, how often do you do any of the following during the spring, summer or fall months?
Base: 2017 (n=1104)

DISTRACTED WALKING INDEX PROFILE



The more dangerous a pedestrian feels distracted walking behaviours are the less likely they are to have engaged in them.

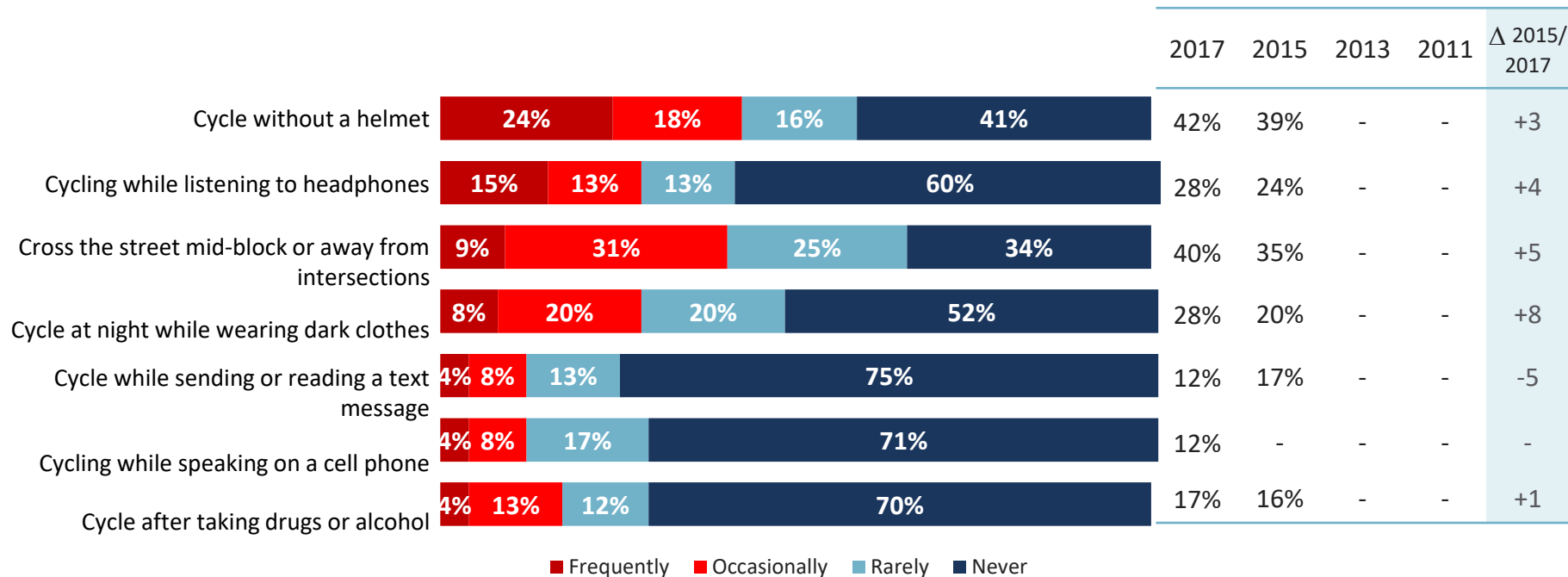
	DISTRACTED WALKING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Attitudes towards dangerous walking behaviour (% Very dangerous 6-7)				
Walking while sending or reading a text message	82% BCD	67% CD	37%	35%
Walking while speaking on a cell phone	72% BCD	54% CD	20%	20%
Walking while listening to headphones	81% BCD	57% CD	29%	23%
Crossing the street mid-block or away from intersections (or jay-walking) daytime	82% BCD	50% CD	25%	25%
Crossing the street mid-block or away from intersections (or jay-walking) in dark	86% BCD	74% CD	49% D	35%
Walking after taking drugs or alcohol	81% BCD	57% CD	32%	26%
Walking at night while wearing dark clothing	84% CD	76% CD	46% D	34%

Q4b. Now thinking about your own behaviour, how often do you do any of the following during the spring, summer or fall months?
Base: 2017 (n=1104)

CYCLISTS' BEHAVIOUR










A sizeable minority of cyclists report doing so without a helmet at least occasionally and fully one-quarter do so frequently. Other common risky behaviours include crossing the street mid-block, cycling while listening to headphones or cycling while wearing dark clothes.



CYCLISTS' BEHAVIOUR



Young male drivers are more likely to cycle without a helmet or while listening to headphones, while Motorcyclists are more likely to cross the street mid-block, cycle at night while wearing dark clothes, while speaking on a cell phone or after taking drugs or alcohol.

Frequently/occasionally	TOTAL							
Cycle without a helmet	42%	69% ↑	32%	53%	46%	42%	42%	47%
Cycling while listening to headphones	27%	53% ↑	8% ↓	52%	27%	27%	27%	37%
Cross the street mid-block or away from intersections	40%	48%	38%	29%	44%	40%	40%	56% ↑
Cycle at night while wearing dark clothes	28%	39%	6% ↓	21%	32%	27%	28%	46% ↑
Cycle while sending or reading a text message	12%	25%	3%	19%	13%	12%	12%	21%
Cycling while speaking on a cell phone	11%	21%	0%	17%	18%	12%	11%	27% ↑
Cycle after taking drugs or alcohol	17%	24%	12%	9%	18%	16%	17%	31% ↑








Q4d. Now thinking about your own behaviour, how often do you do any of the following during the spring, summer or fall months?

Base: 2017 target segments (n=varies)

DISTRACTED CYCLING INDEX



At more than four in ten (44%), the largest proportion of cyclists engage in a low degree of distracted cycling behaviour, followed by one quarter (25%) who do so to a moderate degree. One in ten (9%) cyclists engage in a high degree of distracted cycling behaviour, while around two in ten (22%) report having never done so. Young male drivers are more likely to engage in a moderate degree of distracted cycling while Senior drivers are more likely to have never engaged in distracted cycling behaviour.

	TOTAL							
	210	32	30	11	105	209	210	52
Never (1)	22%	4% ↓	44% ↑	19%	22%	22%	22%	14%
Low (>1-<2)	44%	32%	48%	20%	45%	44%	44%	35%
Moderate (2-<3)	25%	49% ↑	3% ↓	52%	23%	25%	25%	34%
High (3+)	9%	15%	5%	9%	10%	9%	9%	17%
AVERAGE RATING	1.8	2.3	1.4	2.1	1.8	1.8	1.8	2.1

DISTRACTED CYCLING INDEX: Based on average rating of behaviours at Q4d. Each activity is scored based on the response provided (1-Never, 4-Frequently), the respondents index score is the average rating of all activities. A higher rating means the respondent engages in more distracted cycling behaviour.

DISTRACTED CYCLING INDEX PROFILE



Cyclists who engage in a higher degree of distracted cycling behaviour are more likely to be male, to reside in the GTA (either 416 or 905) or to be under the age of 44 years old (and 25-44 specifically).

TOTAL	DISTRACTED CYCLING INDEX			
Average rating	Never	Low	Mod	High
1.4	1	>1-<2	2-<3	3+
% of population	22%	44%	25%	9%

	DISTRACTED CYCLING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Gender				
Men	43%	58%	64% _A	81%
Women	57% _C	42%	36%	19%

	DISTRACTED CYCLING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Age				
16-24	11%	12%	36% _{AB}	16%
25-44	33%	34%	49%	71% _{AB}
45-64	43% _{CD}	47% _{CD}	14%	6%
65+	12% _C	7%	1%	7%
Region				
Central	2%	13% _A	10%	-
Southwest	23%	19%	25%	13%
North	4%	6%	9%	12%
East	20% _D	16%	10%	-
GTA 905	30% _B	13%	18%	34% _B
GTA 416	21%	34%	28%	41%

Q4d. Now thinking about your own behaviour, how often do you do any of the following during the spring, summer or fall months?
Base: 2017 (n=210)

DISTRACTED CYCLING INDEX PROFILE



The more dangerous a cyclist feels distracted cycling behaviours are the less likely they are to have engaged in them.

	DISTRACTED CYCLING INDEX			
	Never	Low	Mod	High
	A	B	C	D
Attitudes towards dangerous cycling behaviour (% Very dangerous 6-7)				
Cycling while sending or reading a text message	100% BCD	83% CD	60%	55%
Cycling while speaking on a cell phone	95% BCD	80% C	55%	61%
Cycling while listening to headphones	98% BCD	72% C	26%	57% c
Crossing the street mid-block or away from intersections during the day	91% BCD	39% c	20%	54% c
Crossing the street mid-block or away from intersections when dark outside	93% BCD	52%	42%	67%
Cycling after taking drugs or alcohol	100% BCD	70% c	52%	73%
Cycling at night while wearing dark clothing	92% BCD	73% c	37%	73% c
Cycling without a helmet	85% BCD	58%	44%	52%

Q4d. Now thinking about your own behaviour, how often do you do any of the following during the spring, summer or fall months?
Base: 2017 (n=210)



IMPAIRED DRIVING

ATTITUDES – IMPAIRED DRIVING



The vast majority of Ontarians feel its dangerous to drive after taking drugs or drinking, particularly after taking drugs for recreational purposes or having three or more drinks, and are more inclined to think most of these activities are dangerous than in 2015.

DRIVING AFTER...

Taking drugs for recreational purposes



Three or more drinks



Using marijuana



Taking Rx or OTC meds that indicates it can affect your ability to drive



One or two drinks



■ Extremely/very dangerous (6-7) ■ Somewhat Dangerous (3-5) ■ Not Dangerous (1-2) ■ Don't know

Data <3% not labeled

2017	2015	2013	2011	Δ 2015/ 2017
90%	85%	-	-	+5 ↑
90%	84%	85%	77%	+6 ↑
75%	72%	-	-	+3
71%	66%	77%	79%	+5 ↑
57%	57%	62%	51%	=

Q4. In your view, how dangerous are each of the following in terms of road safety?
Base: All respondents 2017 (n=1284-1308); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – IMPAIRED DRIVING



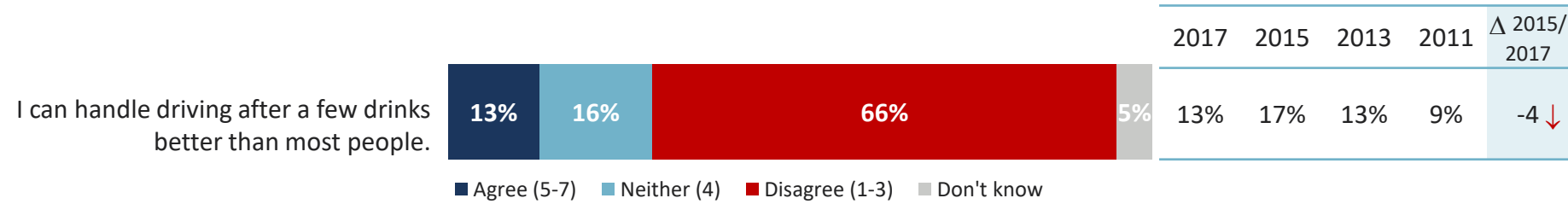
Most segments share similar views in terms of the danger of impaired driving with the exception of Young male drivers and Motorcyclists. All behaviours are viewed as less dangerous by Young male drivers compared to the average. Motorcyclists are similarly less likely to think recreational drug use and three or more alcoholic beverages pose a threat to road safety.

Extremely/Very Dangerous	TOTAL							
Taking drugs for recreational purposes	90%	82%↓	91%	93%	90%	90%	89%	80%↓
Three or more drinks	90%	81%↓	93%	86%	90%	90%	88%	79%↓
Using marijuana	75%	64%↓	79%	72%	74%	75%	74%	71%
Taking Rx or OTC meds that indicates it can affect your ability to drive	71%	58%↓	76%	61%	70%	72%	71%	65%
One or two drinks	57%	46%↓	63%	59%	54%	57%	55%	57%

ATTITUDES – IMPAIRED DRIVING



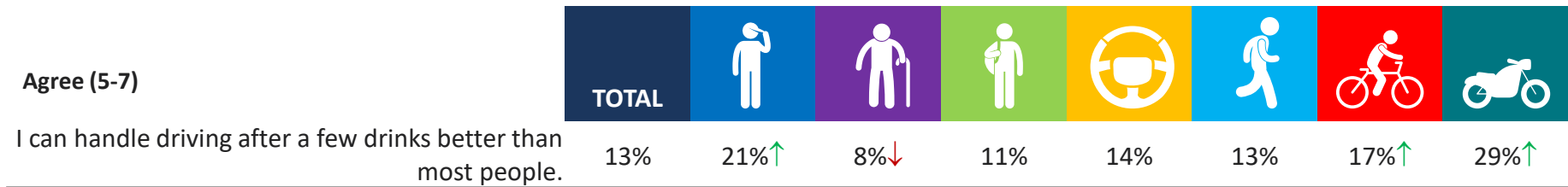
Around one in ten Ontarians agree that they can handle driving after a few drinks better than most people, lower than in 2015 and back in line with attitudes in 2013.



ATTITUDES – IMPAIRED DRIVING



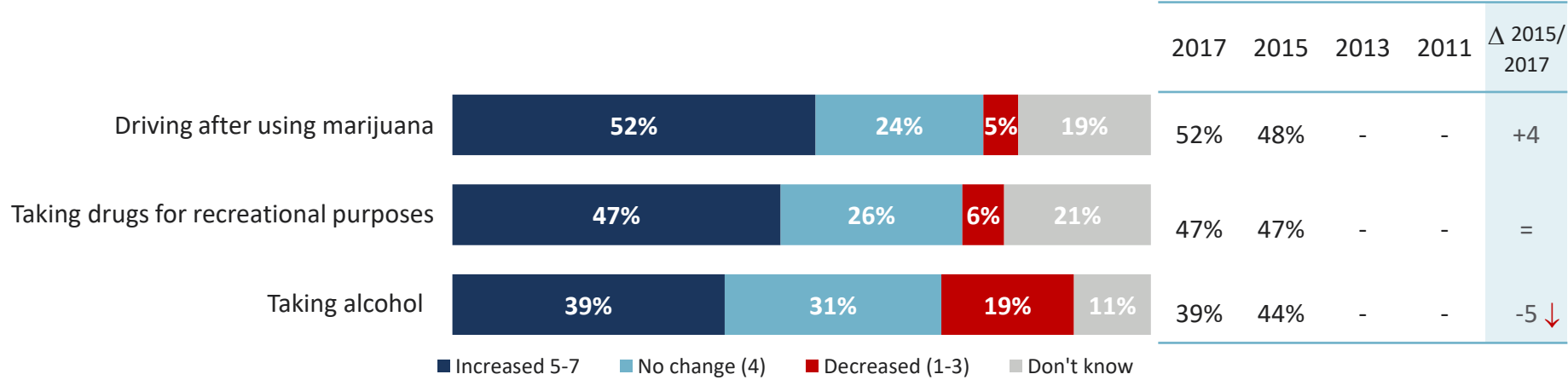
As with other impaired driving metrics, Senior drivers are more conservative in their assessment of being able to consume alcohol and drive while Young male drivers, Motorcyclists, and Cyclists are more likely to agree that they are able to handle driving after having a few drinks compared to most people.



ATTITUDES – IMPAIRED DRIVING



Half of Ontarians feel that driving after using marijuana or taking drugs for recreational purposes has increased over the past five years, while slightly fewer feel driving after drinking alcohol has increased. Ontarians are less likely to feel that driving after drinking alcohol has increased than in 2015.

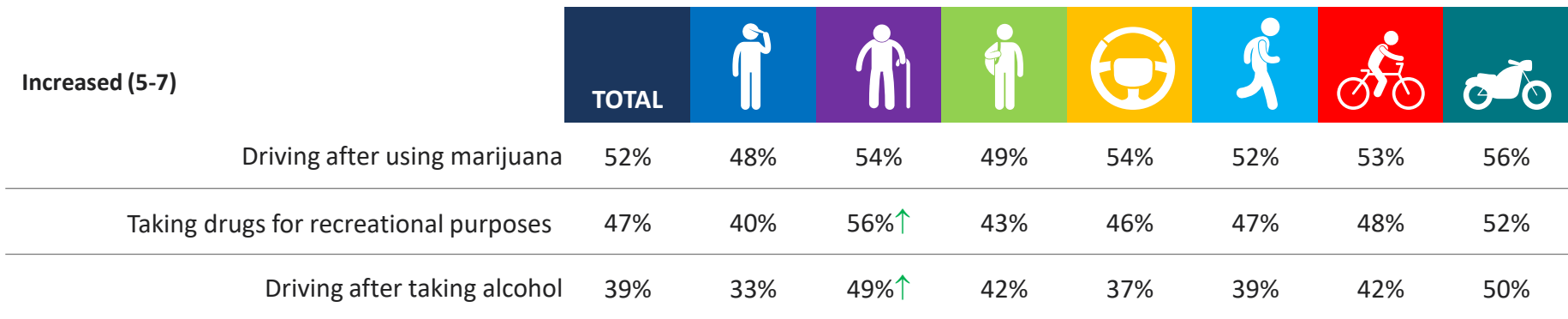


Q13. In your opinion, have the following decreased or increased over the past five years?
Base: All respondents 2017 (n=1328-1342); 2015 (n=1010)

ATTITUDES – IMPAIRED DRIVING



Senior drivers think that recreational drug use as well as driving after consuming alcohol has increased over the past five years. Perceptions of driving under the influence of marijuana are consistently held with about half of all segments agreeing that the incidence of this has been on the rise.

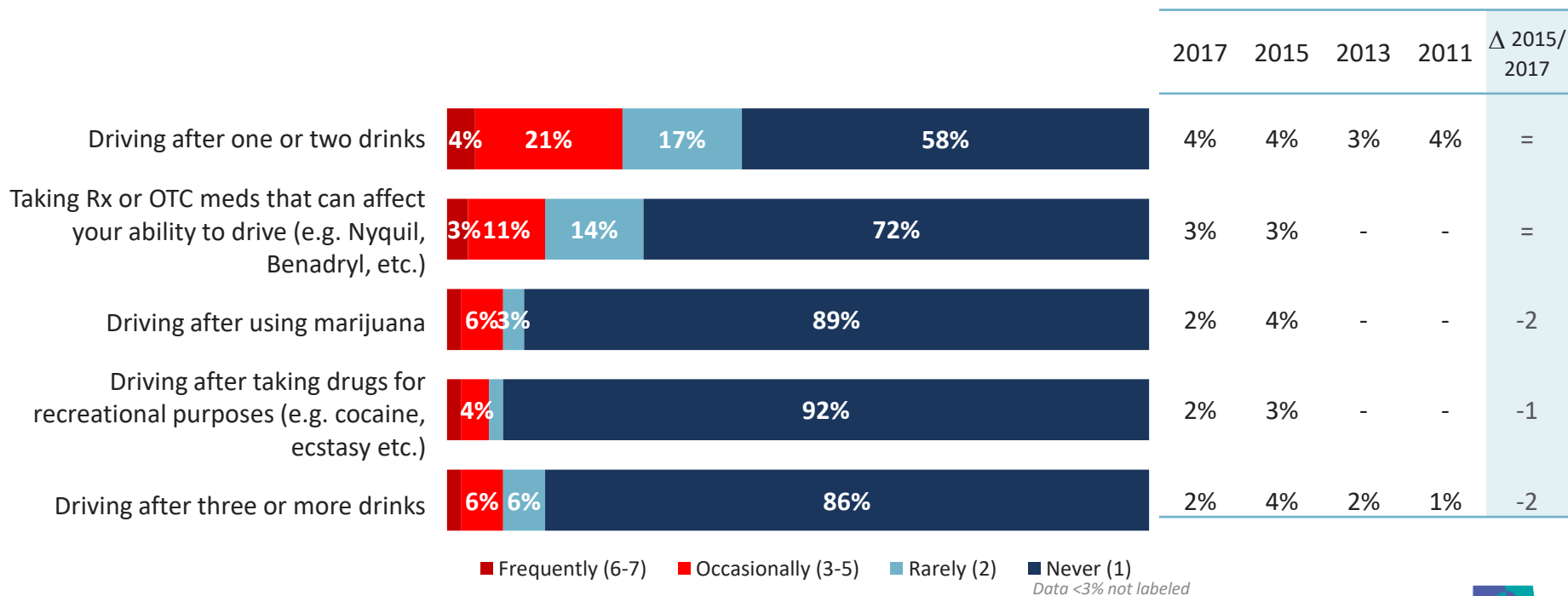


Q13. In your opinion, have the following decreased or increased over the past five years?
Base: 2017 target segments (n=varies)

BEHAVIOUR – IMPAIRED DRIVING



The majority of Ontarians have never engaged in impaired driving and there has been no significant movement in behaviour over time. The most common behaviour is driving after one or two drinks or after taking Rx drugs or other medication. However, few have done so frequently.



BEHAVIOUR – IMPAIRED DRIVING



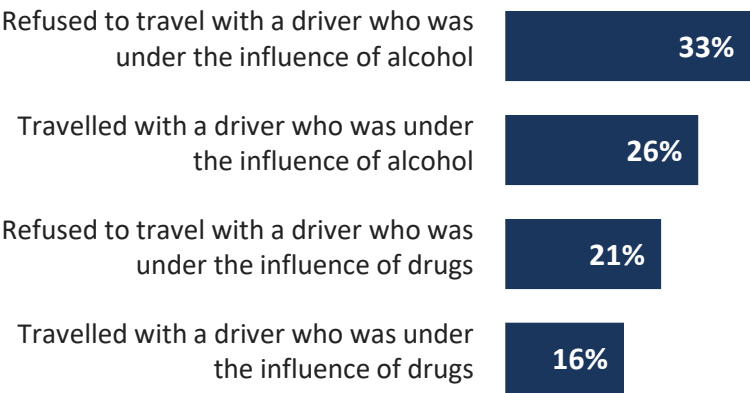
Although overall quite low, some segments report driving while being impaired. Motorcyclists have taken part in all behaviours 'often' while Young male drivers report to have driven after three or more drinks or using marijuana. Likewise, Cyclists also say they often drive under the influence of marijuana. Unsurprisingly, Senior drivers are less likely to drive after consuming any level of alcohol or after recreational drug use.

Often (6-7)	TOTAL							
Driving after one or two drinks	4%	3%	1%↓	2%	4%	4%	5%	10%↑
Taking Rx or OTC meds that can affect your ability to drive (e.g. Nyquil, Benadryl, etc.)	3%	4%	1%	2%	3%	3%	4%	11%↑
Driving after using marijuana	2%	5%↑	1%	3%	3%	2%	4%↑	9%↑
Driving after taking drugs for recreational purposes (e.g. cocaine, ecstasy etc.)	2%	3%	0%↓	2%	2%	2%	3%	11%↑
Driving after three or more drinks	2%	6%↑	0%↓	0%	3%	2%	3%	9%↑

BEHAVIOUR – AS A PASSENGER



One-third of Ontarians have refused to travel with a driver who was under the influence of alcohol and one-quarter have actually traveled with someone who was. Fewer have refused to travel with a driver under the influence of drugs or actually done so. Since 2015, there has been an increase in those who have travelled with someone under the influence of alcohol and a decline in those who refused to travel with someone under the influence of drugs.










2017	2015	2013	2011	Δ 2015/2017
33%	37%	-	-	-4
26%	21%	-	-	+5 ↑
21%	26%	-	-	-5 ↓
16%	14%	-	-	+2

BEHAVIOUR – AS A PASSENGER



Despite being more likely to engage in impaired driving as well as having travelled with a driver who use under the influence of drugs, Motorcyclists are also more likely to have refused to travel with someone who was under the influence of drugs or alcohol. Young male drivers are more likely to have travelled with a driver who was under the influence of drugs.

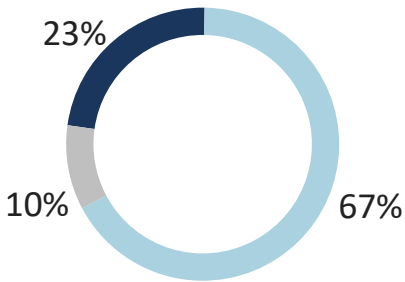
Yes	TOTAL							
Refused to travel with a driver who was under the influence of alcohol	33%	33%	35%	33%	32%	34%	37%	44%↑
Travelled with a driver who was under the influence of alcohol	26%	27%	26%	13%	23%	26%	26%	33%
Refused to travel with a driver who was under the influence of drugs	21%	27%	23%	18%	20%	22%	25%↑	36%↑
Travelled with a driver who was under the influence of drugs	16%	23%↑	9%↓	22%	15%	16%	19%	30%↑

BEHAVIOUR – AS A PASSENGER



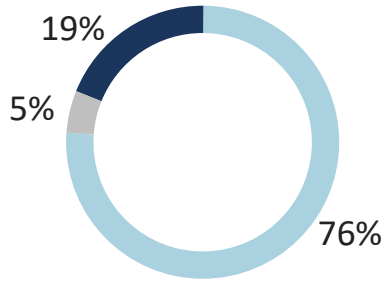
The majority of Ontarians who report having been a passenger with a driver under the influence of drugs or alcohol indicate it happened more than 12 months ago. Those who have been a passenger with a driver under the influence of alcohol are less likely to report it taking place in the past 12 months than in 2015.

Driver under the influence of Drugs



- Past 12 months
- More than 12 months ago
- Don't know

Driver under the influence of Alcohol



2017	2015	2013	2011	Δ 2015/2017
23%	29%	-	-	-6








2017	2015	2013	2011	Δ 2015/2017
19%	32%	-	-	-13 ↓

Q15B. You indicated you've had the following experiences. When did this most recently happen?
Base: 2017 (n=342-203); 2015 (n=120-350)

BEHAVIOUR – AS A PASSENGER



Among those who have experienced some form of impaired driving as a passenger, Male young drivers, Drivers 25-55, Cyclists, and Motorcyclists are more likely to have travelled with drivers who were under the influence of alcohol or marijuana in the past 12 months.

Past 12 months	TOTAL							
Travelled with a driver who was under the influence of alcohol	19%	33%↑	7%↓	39%↑	26%↑	19%	29%↑	41%↑
Travelled with a driver who was under the influence of drugs	23%	31%↑	32%↑	33%	28%↑	23%	27%↑	39%↑

KNOWLEDGE – BAC FOR DRIVERS



Consistent with 2015, a large minority are aware of the proper blood-alcohol concentration for novice or fully licenced drivers. Ontarians continue to under estimate the BAC for fully licensed drivers and over estimate it for novice drivers.

Δ 2015/ 2017	2011	2013	2015	2017	Novice Drivers		Fully Licenced		2017	2015	2013	2011	Δ 2015/ 2017
+1	67%	35%	38%	39%	39%	0.00%	7%		7%	7%	9%	10%	=
+1	7%	8%	7%	8%	8%	0.02%	11%		11%	8%	11%	7%	+3
-1	5%	14%	13%	12%	12%	0.05%	20%		20%	21%	21%	35%	-1
-3	4%	18%	21%	18%	18%	0.08%	38%		38%	38%	34%	32%	=
=	0%	1%	1%	1%	1%	0.10%	1%		1%	2%	2%	0%	-1
=	1%	1%	1%	1%	1%	0.15%	<1%		0%	1%	1%	0%	-1
+1	-	3%	0%	1%	1%	Other	1%		1%	1%	4%	-	=
+1	16%	19%	19%	20%	20%	Don't know	21%		21%	22%	19%	15%	-1

Q9/Q10. In Ontario it is against the law for fully-licensed drivers over 21 years of age to operate a motor vehicle with a blood-alcohol concentration (BAC) above a certain level. This BAC limit is?

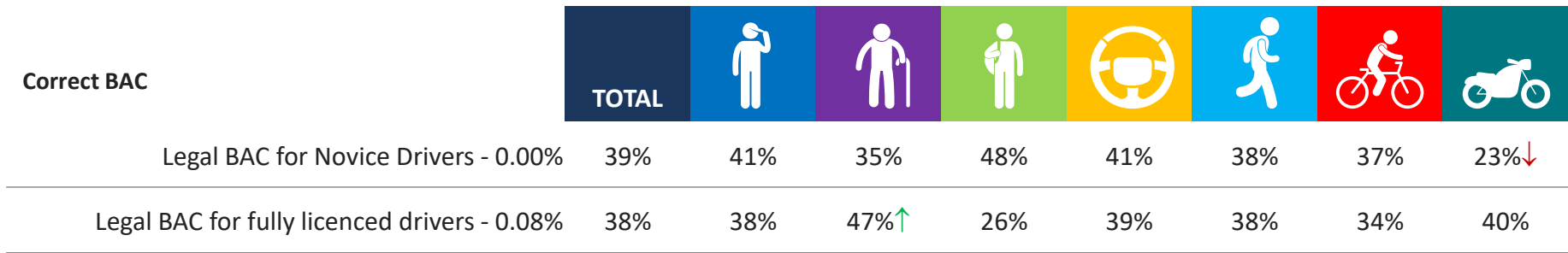
Base: 2017 (n=1,331); 2015 (n=916); 2013 (n=1006); 2011 (n=1096)

Correct Answer

KNOWLEDGE – BAC FOR DRIVERS



The legal BAC limit for drivers is generally understood across segments. Motorcyclists are less likely to be aware of the correct BAC limit for Novice drivers and Senior drivers are more likely than average to know the legal BAC level for fully licenced drivers.



Q9/Q10. In Ontario it is against the law for fully-licensed drivers over 21 years of age to operate a motor vehicle with a blood-alcohol concentration (BAC) above a certain level. This BAC limit is?
Base: 2017 target segments (n=varies)



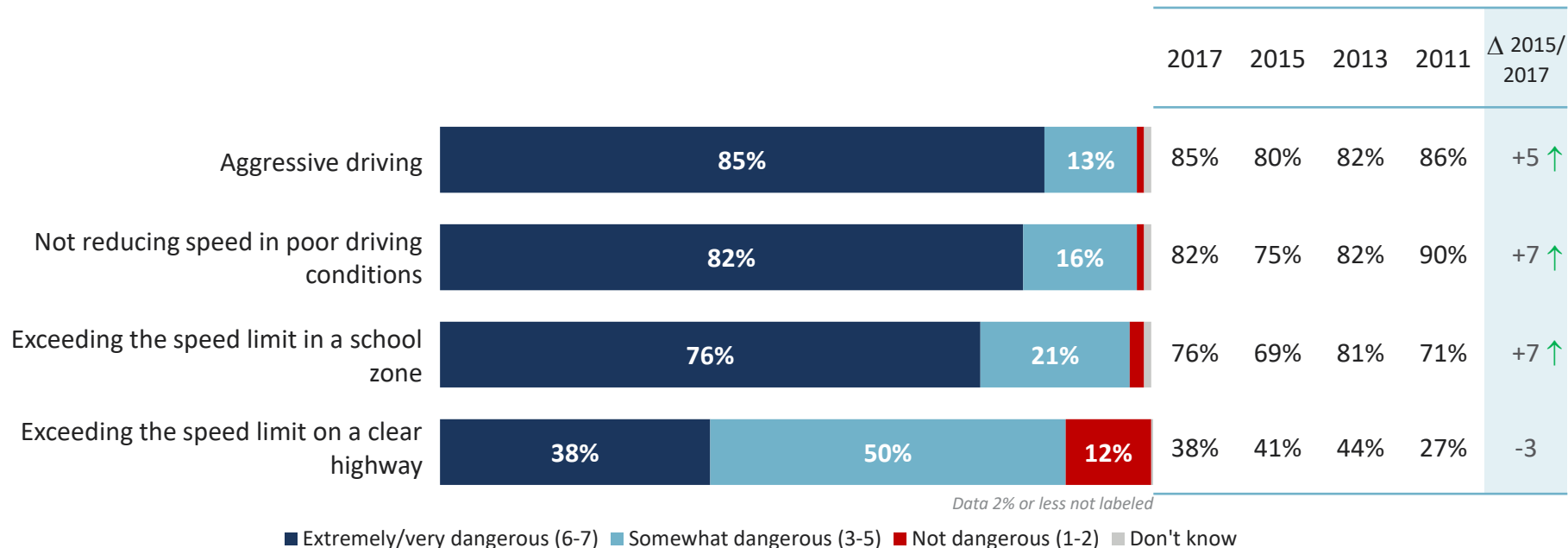
OTHER ISSUES

(AGGRESSIVE DRIVING, SPEEDING, SEATBELTS)

ATTITUDES – DANGER OF SPEEDING



The vast majority of Ontarians continue to believe that aggressive driving, not reducing speed in poor conditions and exceeding the speed limit in a school zone are extremely/ very dangerous actions and are more likely to feel so than in 2015. Comparatively, a minority feel that exceeding the speed limit on a clear highway is dangerous.



Q4. In your view, how dangerous are each of the following in terms of road safety?
Base: All respondents 2017 (n=1,431); 2015 (n=1,010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – DANGER OF SPEEDING



Not reducing speed in poor driving conditions and exceeding the speed limit in a school zone are viewed as particularly dangerous among Senior drivers while Young male drivers hold the opposite opinion. Young male drivers along with Motorcyclists are also less likely to find aggressive driving to be dangerous. Novice drivers are generally in-line with others regarding their views on the danger of speeding with one exception – they are less likely to think exceeding the speed limit in a school zone is dangerous.

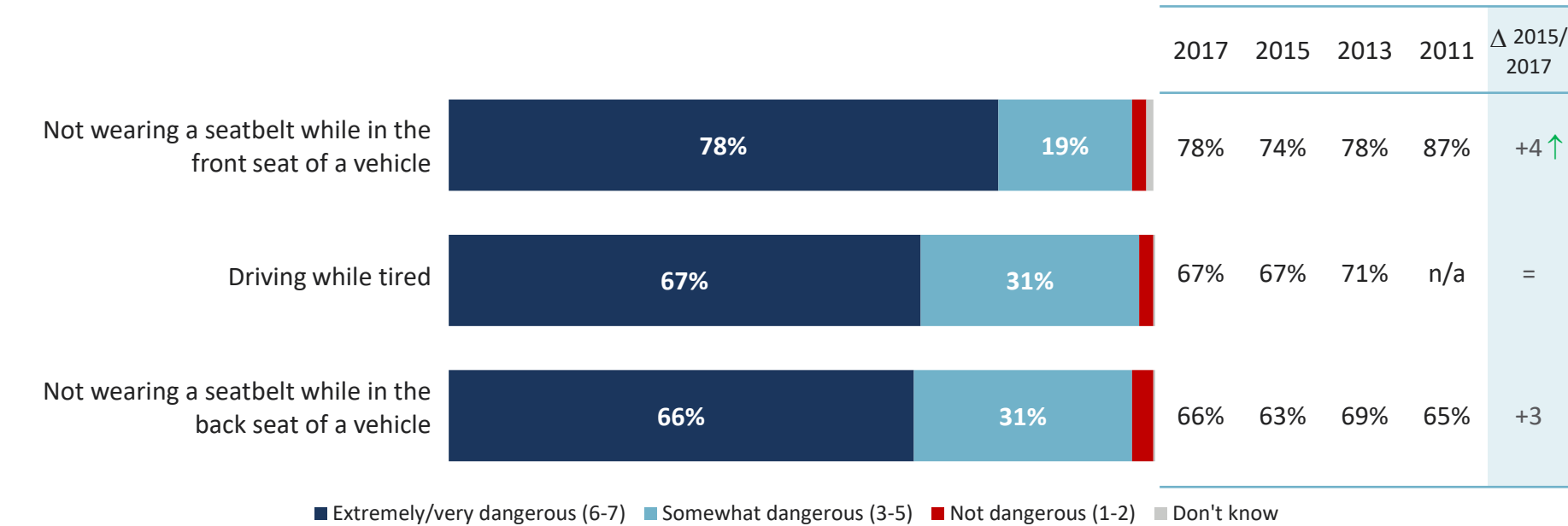
Extremely/Very dangerous (6-7)

	TOTAL							
Aggressive driving	85%	67%↓	87%	77%	83%	85%	83%	73%↓
Not reducing speed in poor driving conditions	82%	63%↓	88%↑	73%	81%	82%	80%	80%
Exceeding the speed limit in a school zone	76%	56%↓	85%↑	57%↓	73%	77%	75%	77%
Exceeding the speed limit on a clear highway	38%	32%	44%	28%	35%	37%	36%	52%↑

ATTITUDES – DANGER OF VARIOUS ACTIONS



Ontarians are decided in their view that not wearing a seatbelt in the front seat of a vehicle is dangerous and are more likely to think so than in 2015, while fewer but still a strong majority feel it is dangerous to drive while tired or to not wear a seatbelt in the back seat.



Data <3% not labeled

Q4. In your view, how dangerous are each of the following in terms of road safety?
Base: All respondents 2017 n=(1431); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – DANGER OF VARIOUS ACTIONS



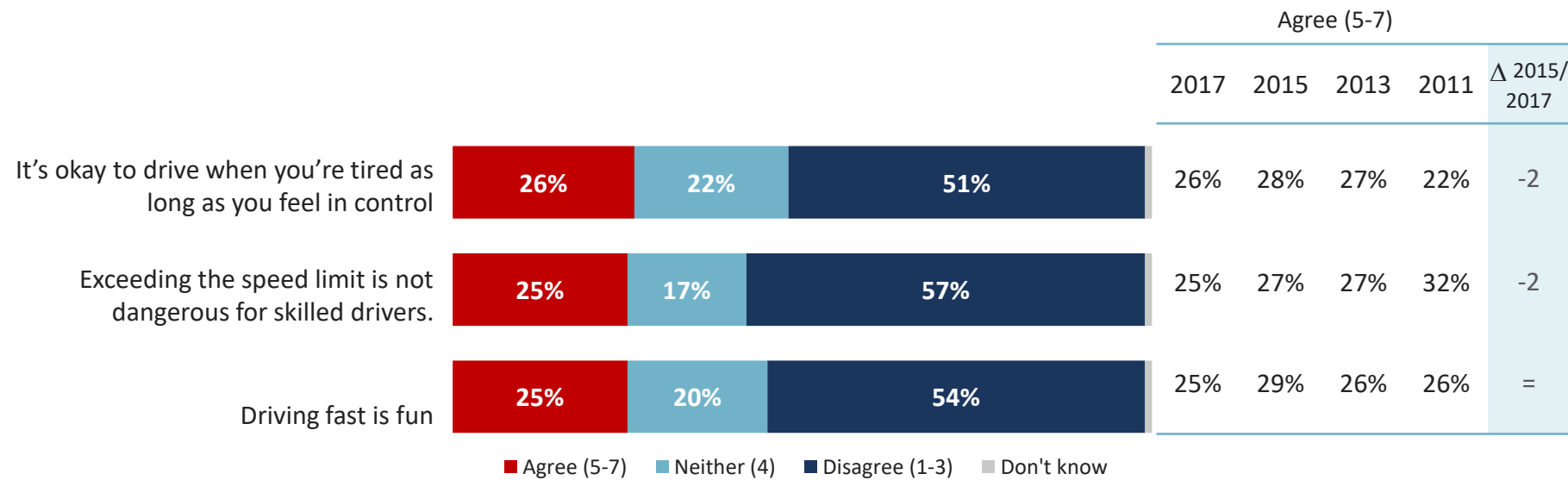
A majority across nearly all segments agree that driving while tired or not wearing a seatbelt while in the back seat of a vehicle is extremely/very dangerous aside from Novice and Young male drivers. The latter group is also less likely to find not wearing a seatbelt while in the front seat of a vehicle to be dangerous. Senior drivers are more likely to view riding in a vehicle without a seatbelt to be a dangerous action.

Extremely/very dangerous (6-7)	TOTAL							
Not wearing a seatbelt while in the front seat of a vehicle	78%	66%↓	84%↑	67%	79%	79%	75%	72%
Driving while tired	67%	45%↓	73%	50%↓	65%	67%	64%	59%
Not wearing a seatbelt while in the back seat of a vehicle	66%	46%↓	73%↑	50%↓	65%	66%	61%↓	59%

ATTITUDES – RISKY ACTIONS



One-quarter of Ontarians think it's okay to drive when you're tired as long as you feel in control, that exceeding the speed limit is not dangerous for skilled drivers and that driving fast is fun. The majority disagree to each behaviour, while around two in ten are neutral. Attitudes are consistent with previous years



Data <3% not labeled

Q5. To what extent do you agree or disagree with the following statements?
Base: All respondents 2017 (n=1305-1341); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES – VARIOUS ACTIONS



Young male drivers and Motorcyclists are more likely to agree that driving while tired is okay as long as you feel in control, that exceeding the speed limit is not dangerous among skilled drivers and that driving fast is fun; Novice drivers are also more likely than average to agree with the last statement.

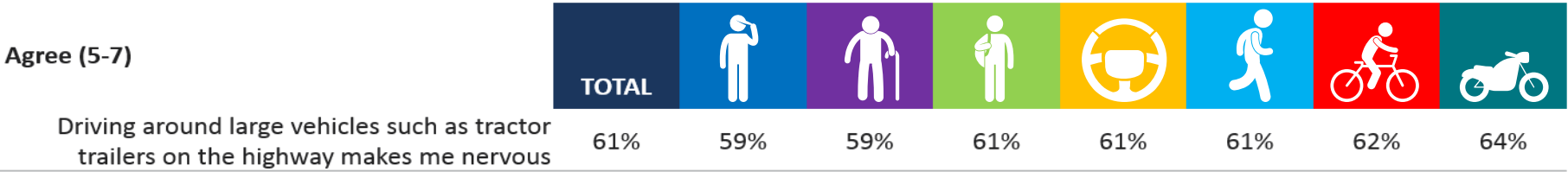
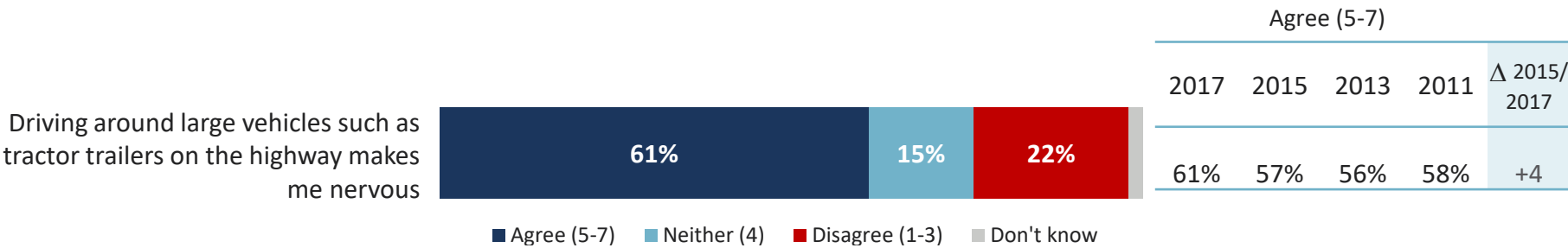
Agree (5-7)

	TOTAL							
It's okay to drive when you're tired as long as you feel in control	26%	38%↑	21%	29%	29%	27%	29%	40%↑
Exceeding the speed limit is not dangerous for skilled drivers	25%	40%↑	21%	25%	29%	24%	27%	37%↑
Driving fast is fun	25%	43%↑	17%↓	48%↑	29%	25%	29%	39%↑

ATTITUDES – OTHER ACTIONS



Consistent with previous years, most Ontarians feel nervous while driving around large vehicles such as tractor trailers on the highway.



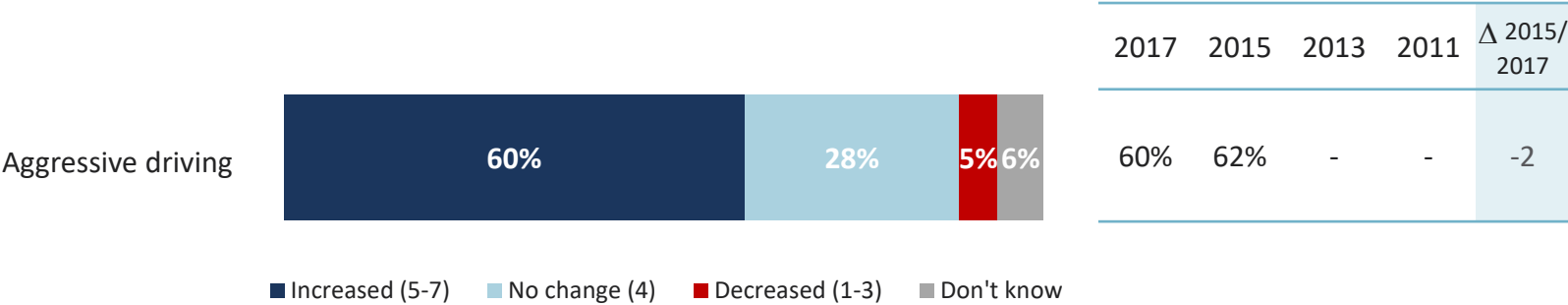
Data <3% not labeled

Q6. To what extent do you agree or disagree with the following statements?
Base: All respondents 2017 (n=1305-1341); 2015 (n=1010); 2013 (n=1006); 2011 (n=1096)

ATTITUDES



A majority of Ontarians feel that aggressive driving has increased over the past five years, consistent with 2015 figures.

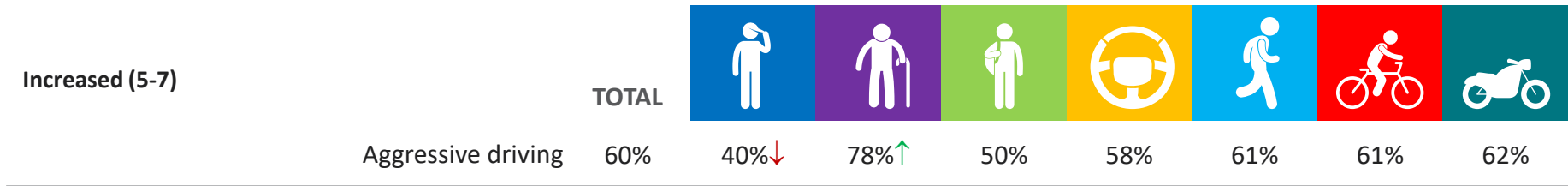


Q13. In your opinion, have the following decreased or increased over the past five years?
Base: All answering 2017 (n=1321); 2015 (n=1010)

ATTITUDES



Young male drivers continue to be a foil to Senior drivers in terms of many behaviours and attitudes; the former are less likely to say aggressive driving has increased over the past five years while the latter feel the opposite.

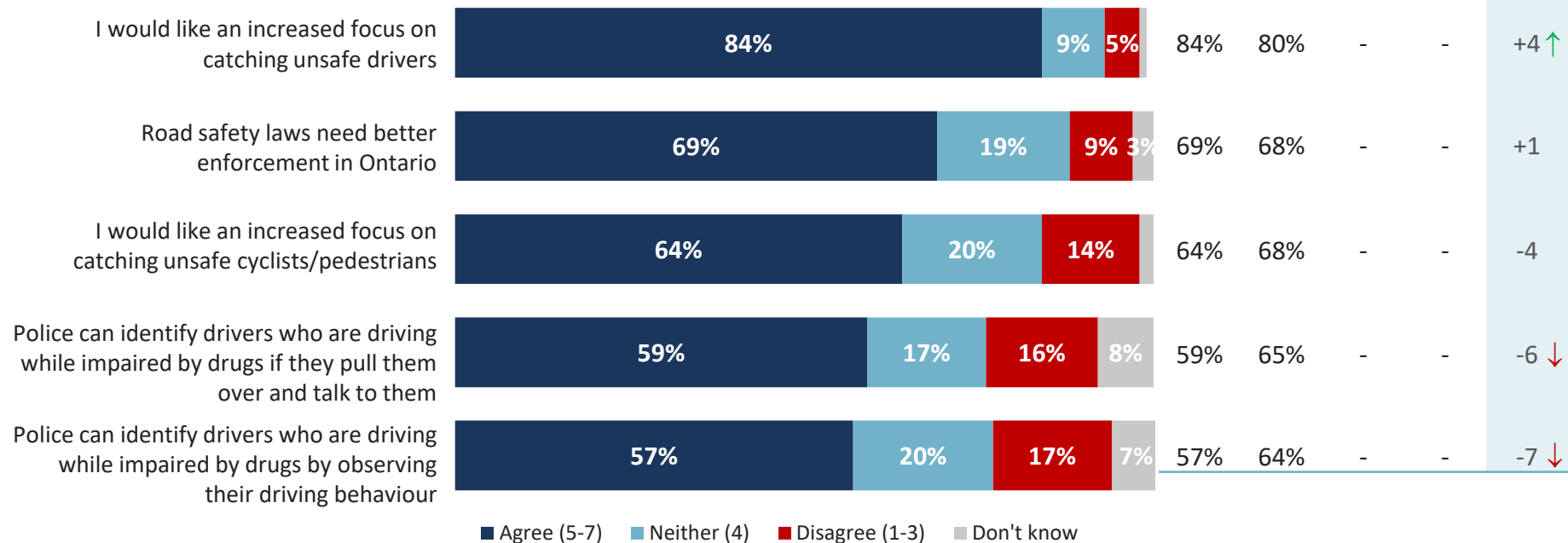


Q13. In your opinion, have the following decreased or increased over the past five years?
Base: 2017 target segments (n=varies)

ATTITUDES - ENFORCEMENT










Ontarians continue to feel that an increased focus on catching unsafe drivers is necessary and more so than in 2015, while strong majorities want road safety laws to be better enforced and an increased focused on catching unsafe cyclists/ pedestrians. Confidence in police ability to identify drug drivers however is waning with fewer agreeing they feel police can identify them by talking to them or observing driving behaviour.



ATTITUDES - ENFORCEMENT



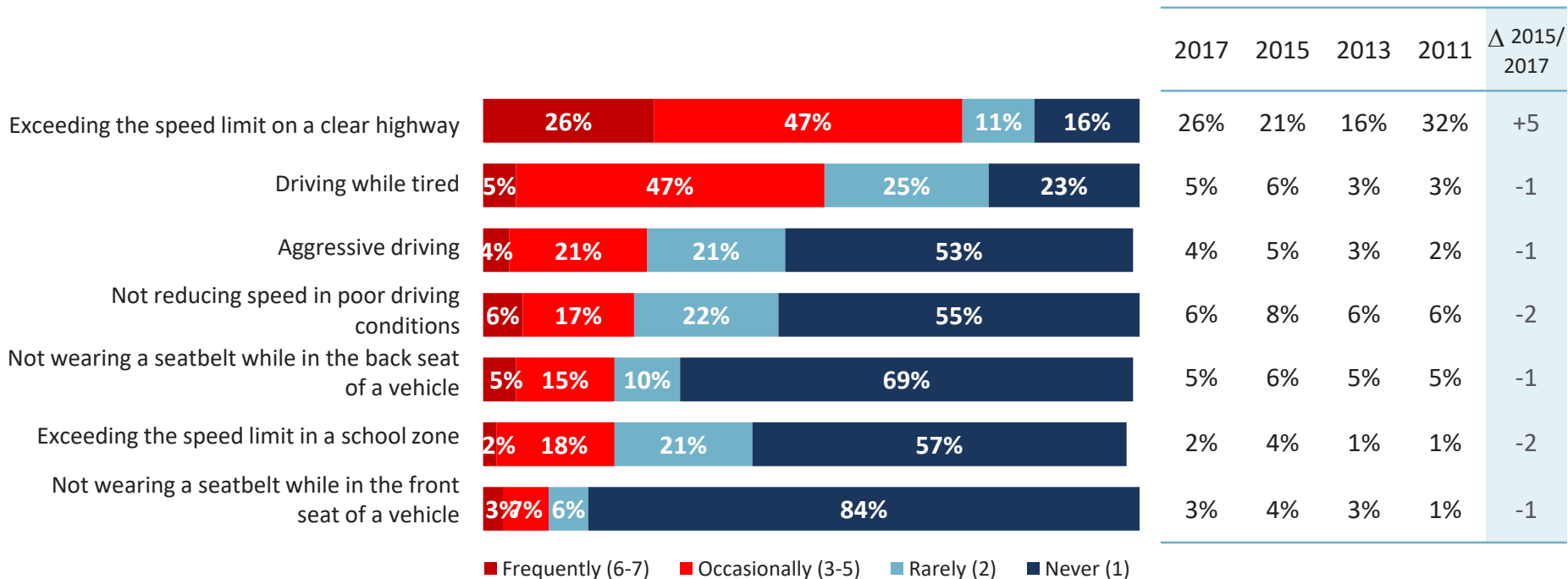
Overall, Ontarians agree that they would like an increased focus on catching unsafe drivers; Senior drivers most strongly hold this view while Motorcyclists and Young male drivers are less likely to agree. Seniors also think road safety laws require better enforcement whereas Novice drivers are less likely than average to agree with this statement.

Agree (5-7)	TOTAL							
I would like an increased focus on catching unsafe drivers	84%	75%↓	92%↑	77%	82%	84%	84%	76%↓
Road safety laws need better enforcement in Ontario	69%	64%	76%↑	48%↓	67%	69%	66%	69%
I would like an increased focus on catching unsafe cyclists/pedestrians	64%	63%	81%↑	54%	65%	64%	60%	63%
Police can identify drivers who are driving while impaired by drugs if they pull them over and talk to them	59%	71%↑	53%	60%	59%	60%	61%	63%
Police can identify drivers who are driving while impaired by drugs by observing their driving behaviour	57%	64%	53%	61%	56%	57%	57%	60%

BEHAVIOUR – AS A DRIVER



The vast majority indicate exceeding the speed limit on a clear highway at least occasionally and one-quarter report doing so frequently. Driving while tired is also a common behaviour while one-quarter or fewer report engaging in more serious driving behaviours and most report never having done so.










Q19. How often do you find yourself doing any of the following?

Base: 2017 (n=1029-1052); 2015 (n=768-777), 2013 (n=866); 2011 (n=983)

BEHAVIOUR – AS A DRIVER



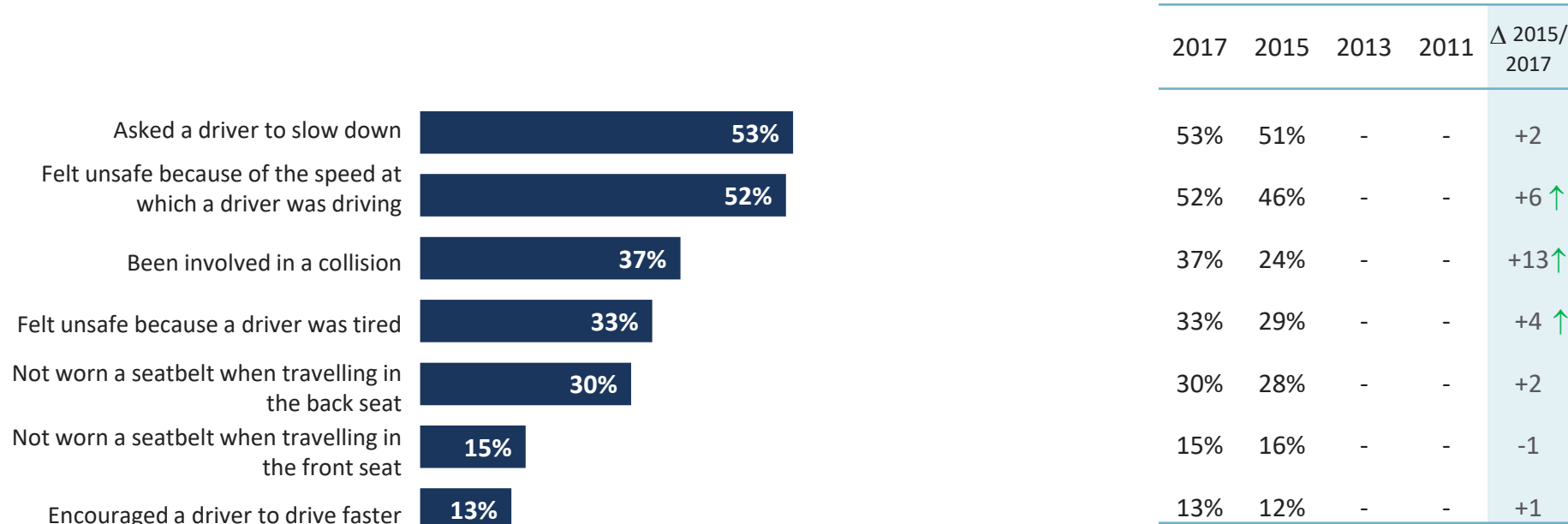
Motorcyclists are open with their behaviour and are more likely to admit they often take part in all activities except of speeding on a clear highway. Young male drivers are more likely to report that they often drive aggressively, do not wear a seatbelt in the back of a vehicle, and exceed the speed limit in school zones; the last two behaviours are commonly reported among Novice drivers as well.

Top 2 Box - Often	TOTAL							
Exceeding the speed limit on a clear highway	26%	25%	19%↓	17%	29%	26%	24%	23%
Not reducing speed in poor driving conditions	6%	7%	6%	-	6%	6%	7%	13%↑
Not wearing a seatbelt while in the back seat of a vehicle	5%	10%↑	3%	12%↑	6%	5%	7%	12%↑
Driving while tired	5%	6%	2%↓	2%	5%	5%	6%	12%↑
Aggressive driving	4%	10%↑	1%↓	7%	4%	4%	6%	14%↑
Not wearing a seatbelt while in the front seat of a vehicle	3%	3%	3%	5%	3%	3%	4%	9%↑
Exceeding the speed limit in a school zone	2%	7%↑	1%	7%↑	3%	2%	3%	11%↑

BEHAVIOUR – AS A PASSENGER



A majority of Ontarians have asked the driver to slow down or felt unsafe because the driver was speeding, while nearly four in ten have been in a collision. Compared to 2015, more Ontarians report being in a collision or feeling unsafe as a passenger because the driver was speeding or tired.










Q15A. When you've been a passenger in a vehicle, have you ever...
Base: All respondents 2017 (n=1431); 2015 (n=864)

BEHAVIOUR – AS A PASSENGER



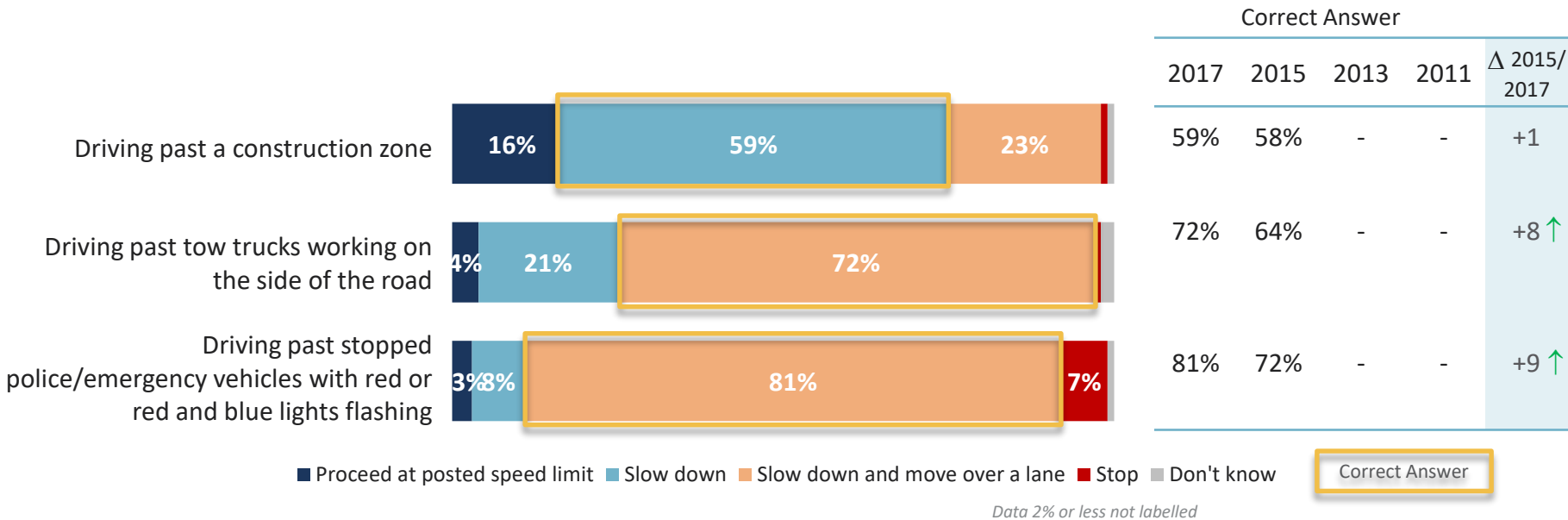
While being a passenger, both Young male drivers and Motorcyclists are more likely to have not worn a seatbelt and have encouraged a driver to go faster. Senior drivers are less likely to have encouraged a driver to drive faster or to have not worn a seatbelt when travelling in the back seat.

Yes	TOTAL							
Asked a driver to slow down	53%	45%	51%	47%	53%	53%	57%	54%
Felt unsafe because of the speed at which a driver was driving	52%	45%	51%	48%	50%	52%	53%	48%
Been involved in a collision	37%	32%	36%	31%	36%	37%	38%	38%
Felt unsafe because a driver was tired	33%	32%	31%	32%	29%	33%	35%	35%
Not worn a seatbelt when travelling in the back seat	30%	42%↑	20%↓	47%↑	28%	30%	33%	40%↑
Not worn a seatbelt when travelling in the front seat	15%	23%↑	12%	26%	13%	15%	17%	26%↑
Encouraged a driver to drive faster	13%	29%↑	5%↓	23%	16%	13%	16%	22%↑

KNOWLEDGE – SLOW DOWN AND MOVE OVER



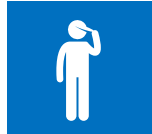






The vast majority know that by law you must slow down and move over when driving past a stopped emergency vehicle, while fewer know you should do so when driving past a tow truck or slow down when driving through a construction zone. Ontarians knowledge of proper slow down and move over actions has improved since 2015.

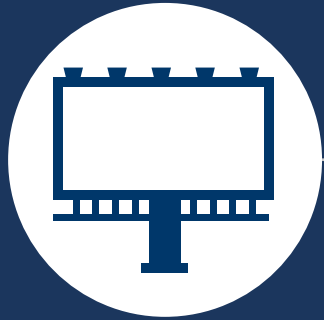


KNOWLEDGE – SLOW DOWN AND MOVE OVER



On average, Young male drivers, Novice drivers, Cyclists and Motorcyclists are less likely to believe they should slow down and move over a lane when driving past stopped police/emergency vehicles with flashing lights while Senior drivers are more likely to think this is the appropriate action to take.

% Responding with the Correct Answer	TOTAL							
		Young male drivers	Novice drivers	Senior drivers	Police/emergency vehicles	Construction zone	Walking	Cyclists
Driving past a construction zone	59%	63%	56%	64%	61%	59%	58%	59%
Driving past tow trucks working on the side of the road	72%	66%	78%↑	62%	69%	71%	66%↓	52%↓
Driving past stopped police/emergency vehicles with red or red and blue lights flashing	81%	67%↓	87%↑	64%↓	80%	80%	75%↓	66%↓

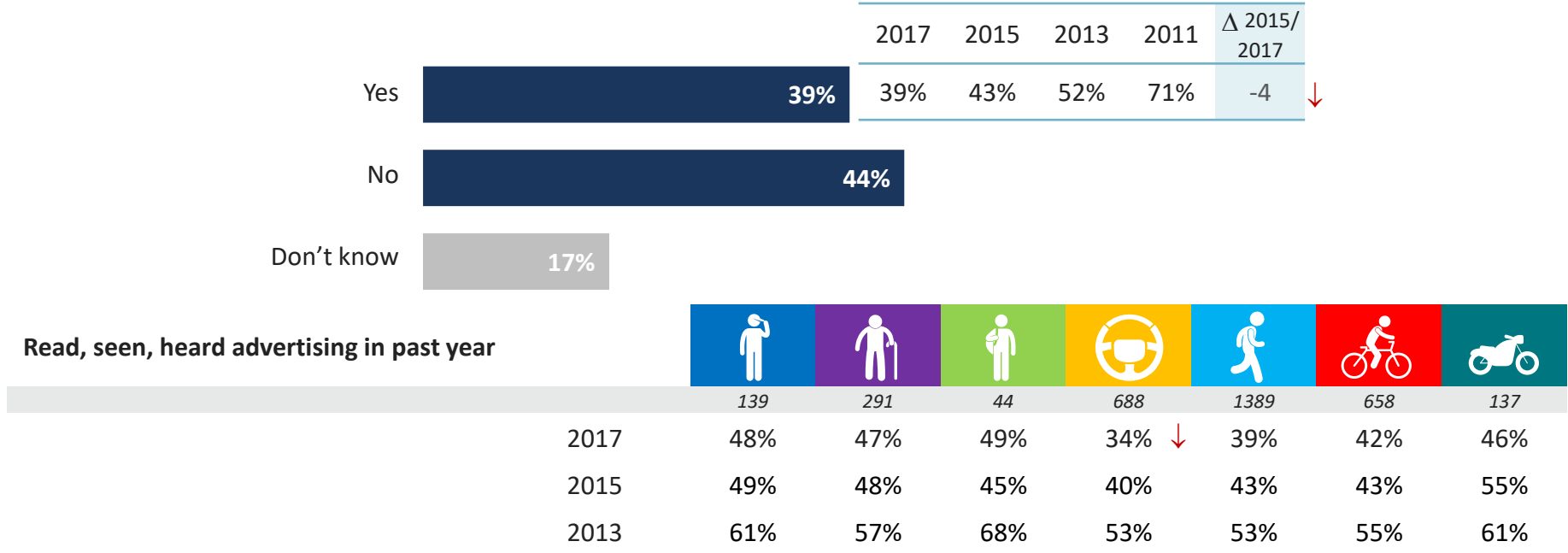


ADVERTISING

ROAD SAFETY ADVERTISING RECALL










Four in ten Ontarians report having seen advertising about road safety in the past year, lower than in 2015 continuing a declining trend seen since 2013. This could reflect smaller media buys by the respective agencies and sponsors, or it could reflect that the advertising creative is not as memorable as it once was and is not being retained top of mind. The decline year over year is among drivers generally (age 25-55), not young/male or senior or novice drivers specifically, although most all segments are down compared to 2013.



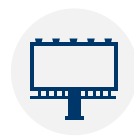
READ, SEEN, HEARD ROAD SAFETY ADVERTISING



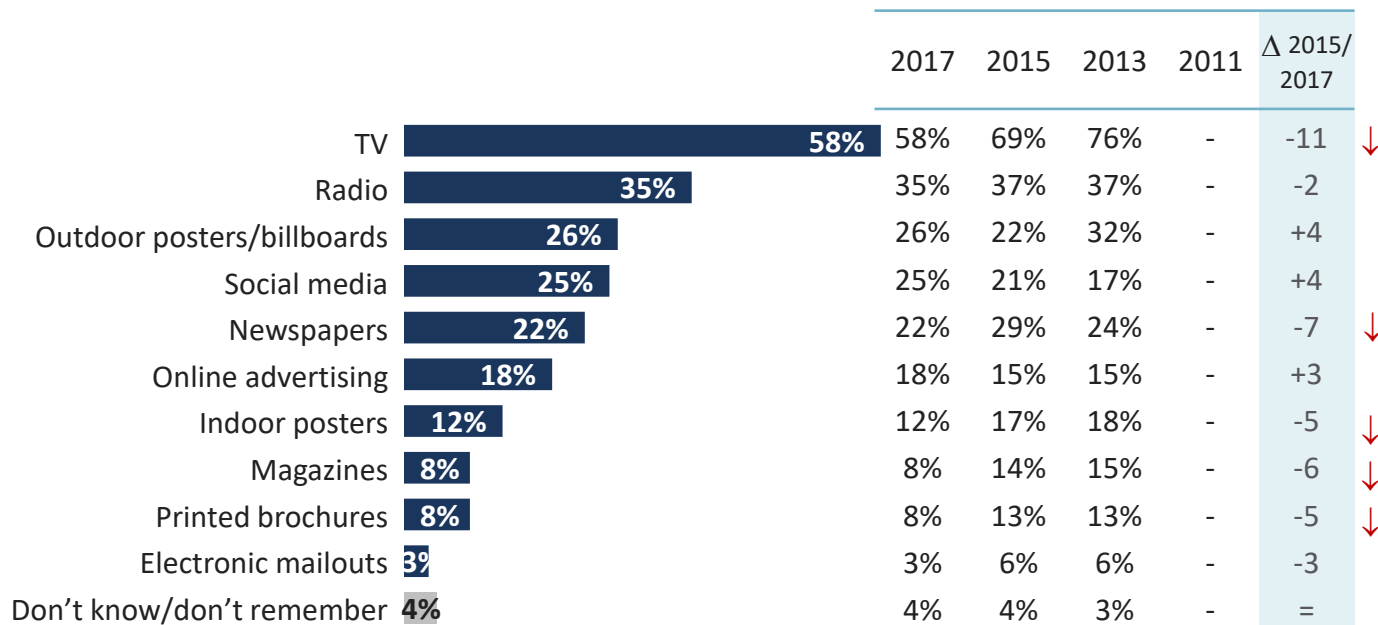
Young male drivers and Senior drivers are more likely to recall encountering road safety advertising over the past year. Advertising awareness is particularly low among Drivers aged 25-55 of which half have not read, seen, or heard any advertising about road safety.

Read, seen, heard advertising in past year	TOTAL							
		1431	139	291	44	688	1389	658
Yes	39%	48% ↑	47% ↑	49%	34% ↓	39%	42%	46%
No	44%	43%	37% ↓	28% ↓	50% ↑	44%	43%	43%
Don't know/No response	17%	9% ↓	15%	24%	16%	17%	16%	11%

SOURCE OF ROAD SAFETY ADVERTISING



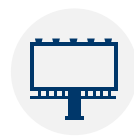
Among those who recall advertising about road safety, most report seeing it on TV while other common sources include radio, outdoor posters/billboards or social media. Recall of advertising from several sources has declined since 2015 including most traditional media such as TV, newspapers and magazines as well as indoor posters and printed brochures.



Q16A. Where do you remember reading, seeing or hearing this road safety advertising?

Reduced Base: Read/seen/heard any advertising about road safety in past year 2017 (n=566); 2015 (n=424); 2013 (n=523)

SOURCE OF ROAD SAFETY ADVERTISING



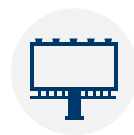
Among those who do recall road safety advertising, the newspaper, magazine, and electronic mailouts are particularly memorable among Motorcyclists. Unsurprisingly, Senior drivers are less likely to recall online forms of advertisement.

	TOTAL							
	566	67	141	22	233	556	277	63
On TV	58%	52%	65%	51%	51%	58%	59%	64%
On the radio	35%	37%	29%	23%	39%	35%	39%	34%
As outdoor posters/billboards	26%	27%	22%	18%	28%	26%	29%	35%
In social media (youtube, facebook, twitter, etc)	25%	34%	8%↓	36%	28%	25%	27%	29%
In newspapers	22%	25%	29%	17%	16%	22%	23%	36%↑
As online advertising	18%	24%	6%↓	32%	17%	18%	21%	21%
As indoor posters	12%	12%	8%	14%	11%	12%	15%	16%
In magazines	8%	9%	8%	4%	6%	8%	9%	16%↑
As printed brochures	8%	3%	5%	4%	6%	8%	9%	13%
As electronic mailouts	3%	7%	1%	4%	3%	3%	4%	16%↑
Don't know / Don't remember	4%	8%	3%	10%	5%	4%	4%	3%

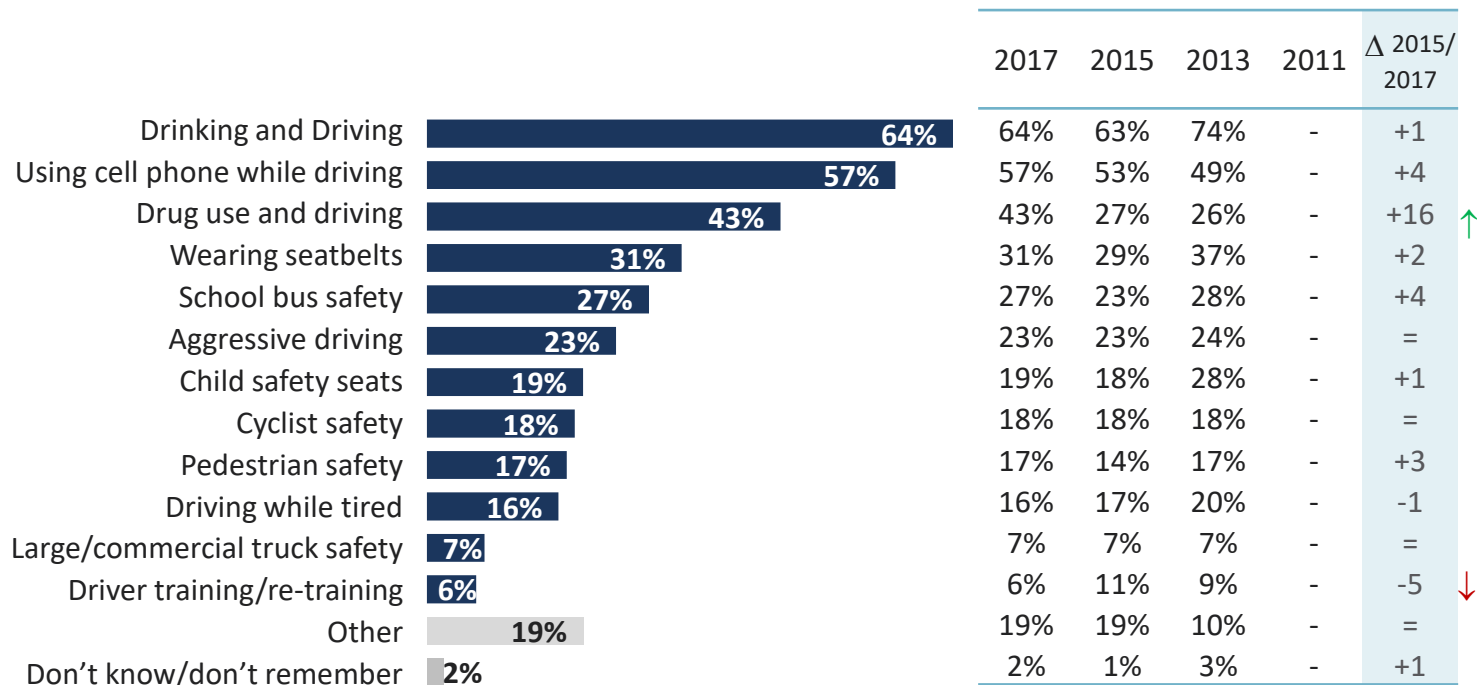
Q16A. Where do you remember reading, seeing or hearing this road safety advertising?

Reduced Base: 2017 target segments - read/seen/heard any advertising about road safety in past year (n=566)

MAIN MESSAGE FROM ADVERTISING



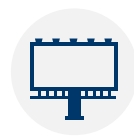
The majority of advertising recalled by Ontarians was about drinking and driving or using a cell phone while driving, while messaging around drug use and driving has increased significantly since 2015. We also observe a decline in advertising about driver training.










Q16B. What were the main messages of the road safety advertising that you remember reading, seeing or hearing during the past year?

Reduced Base: Read/seen/heard any advertising about road safety in past year 2017 (n=566); 2015 (n=424); 2013 (n=523)

MAIN MESSAGE FROM ADVERTISING



The key takeaways from road safety messaging are quite consistent throughout the target segments. Motorcyclists are more likely to recall ads about wearing seatbelts, cyclist safety, driving while tired, and driver training/re-training. Senior drivers in particular report having come across messaging about school bus safety and aggressive driving.

	TOTAL							
Drinking and Driving	64%	58%	59%	67%	64%	64%	63%	63%
Using cell phone while driving	57%	55%	53%	50%	61%	57%	56%	56%
Drug use and driving	43%	42%	38%	46%	41%	43%	46%	46%
Wearing seatbelts	31%	29%	27%	28%	33%	31%	32%	50%↑
School bus safety	27%	16%	37%↑	31%	25%	27%	29%	35%
Aggressive driving	23%	24%	31%↑	24%	19%	23%	25%	30%
Child safety seats	19%	13%	18%	32%	15%	19%	20%	25%
Cyclist safety	18%	18%	16%	17%	21%	18%	20%	33%↑
Pedestrian safety	17%	14%	18%	13%	15%	17%	18%	23%
Driving while tired	16%	16%	11%	9%	15%	16%	18%	31%↑
Large/commercial truck safety	7%	3%	7%	4%	6%	7%	7%	12%
Driver training/re-training	6%	14%↑	3%	5%	7%	6%	8%	21%↑
Other	19%	14%	34%↑	10%	17%	18%	13%↓	6%↓
Don't know/don't remember	2%	-	2%	4%	1%	2%	1%	-

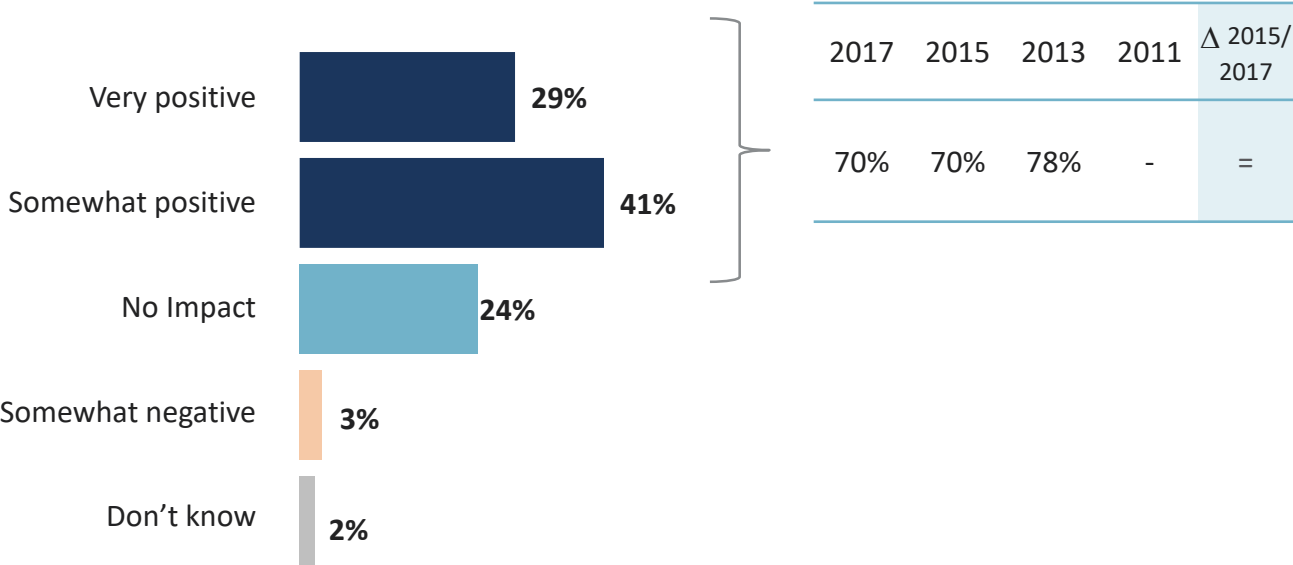
Q16B. What were the main messages of the road safety advertising that you remember reading, seeing or hearing during the past year?

Reduced Base: 2017 target segments - read/seen/heard any advertising about road safety in the past year 2017 (n=566)

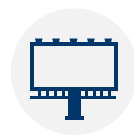
IMPACT OF ADVERTISING ON DRIVING

















The vast majority of those who saw advertising about road safety stated it had a positive impact on their driving, consistent with 2015. However, it continues to be lower than the level of stated positive impact in 2013.



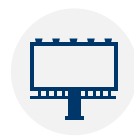
STATED IMPACT OF ADVERTISING ON DRIVING



Despite various levels of recall, the impact road safety advertisements have on one's driving is reasonably consistent across segments – directionally less impactful on pedestrians and directionally more impactful to motorcyclists. Compared to past years, the ads this year appear to have directionally greater impact on young male drivers, novice drivers and motorists age 25-55 than two years ago – closer to the level of impact in 2013.

STATED IMPACT		TOTAL							
Very positive		29%	28%	34%	18%	30%	30%	33%	40%
Somewhat positive		41%	48%	40%	58%	44%	41%	41%	40%
No impact		24%	17%	22%	19%	23%	24%	21%	14%
POSITIVE IMPACT (Very or Somewhat)		TOTAL							
2017			76%	74%	76%	74%	71%	74%	79%
2015			59%	74%	64%	68%	70%	70%	79%
2013			81%	86%	85%	76%	78%	80%	84%

RECALL OF SPECIFIC CAMPAIGNS



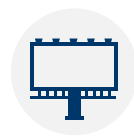
Awareness continues to be highest for the Arrive Alive Drive Sober campaign followed by RIDE and to a lesser extent MADD or LCBO campaigns. Since 2015, there has been a decline in recall of several campaigns including LCBO, MADD, Operation Lookout, the Seatbelt Campaign or the Road Safety Challenge.

		2017	2015	2013	2011	Δ 2015/ 2017
Arrive Alive Drive Sober	79%	79%	80%	84%	91%	-1
RIDE (Reduce Impaired Driving Everywhere)	66%	66%	67%	78%	86%	-1
MADD Red Ribbon	46%	46%	58%	68%	85%	-12 ↓
MADD 911	48%	48%	59%	52%	-	-11 ↓
LCBO Safe Driving Campaign - Deflate the Elephant	47%	47%	63%	62%	56%	-16 ↓
School Bus Safety Week	40%	40%	41%	46%	41%	-1
Seatbelt Campaign	40%	40%	50%	60%	64%	-10 ↓
Road Safety Challenge or local road safety events	19%	19%	26%	27%	14%	-7 ↓
Operation Lookout	14%	14%	26%	28%	-	-12 ↓

Q16D. Do you recall reading, seeing or hearing any of the following road safety campaigns over the past year?

Base: Read/seen/heard any advertising about road safety 2017 (n=566); 2015 (n=343-353); 2013 (n=523); 2011 n=(1096)

RECALL OF SPECIFIC CAMPAIGNS



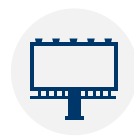
When asked about specific campaigns, Senior drivers are more likely to recall nearly all topics. Novice drivers are more likely to recall MADD 911.

Yes		TOTAL							
	Arrive Alive Drive Sober	59%	55%	76%↑	56%	54%↓	59%	60%	49%↓
	RIDE (Reduce Impaired Driving Everywhere)	49%	43%	68%↑	48%	45%	49%	51%	49%
	MADD Red Ribbon	32%	34%	38%	31%	29%	32%	34%	33%
	MADD 911	31%	42%↑	41%↑	54%↑	26%	32%	35%	37%
	LCBO Safe Driving Campaign - Deflate the Elephant	31%	32%	38%↑	34%	28%	31%	33%	33%
	School Bus Safety Week	25%	25%	41%↑	26%	22%	25%	27%	29%
	Seatbelt Campaign	23%	21%	40%↑	24%	20%	24%	26%	33%↑
	Road Safety Challenge or local road safety events	10%	21%↑	12%	12%	9%	10%	13%↑	20%↑
	Operation Lookout	7%	13%↑	9%	7%	7%	7%	8%	14%↑

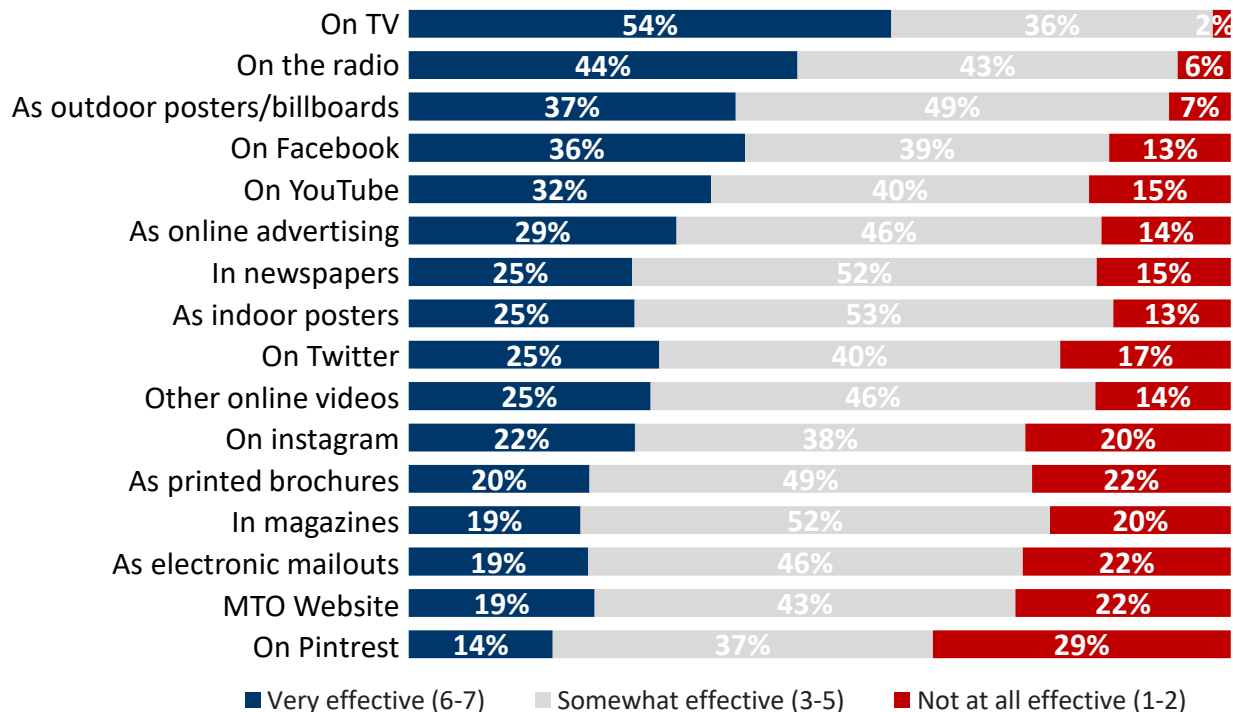
Q16D. Do you recall reading, seeing or hearing any of the following road safety campaigns over the past year?

Base: 2017 target segments – all respondents

EFFECTIVE CHANNELS TO PROMOTE ROAD SAFETY



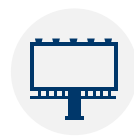
Traditional channels like television and radio are considered the most effective to promote information about road safety, while outdoor and social media/ online advertising are also seen as very effective by a sizeable minority.



Q16G. When it comes to providing information on road safety, how effective do you think each of the following channels would be?








Base: All respondents 2017 (n=1431)

EFFECTIVENESS OF CHANNELS TO PROMOTE ROAD SAFETY



There very different opinions among the target segments as to which channels are most effective at providing information on road safety. Motorcyclists 25-64 are more likely to think virtually all channels are effective while Senior drivers are more likely to think TV is a very effective channel and less likely to think so about social media. Young male drivers and Drivers 25-55 think TV would be less effective, Young male drivers also don't think newspapers would be as effective. Novice drivers prefer channels like YouTube, indoor posters or other online advertising, while Cyclists lean towards Instagram or electronic mailouts.

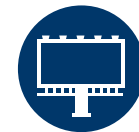
Very effective (6-7)

	TOTAL							
On TV	54%	44% ↓	61% ↑	56%	49% ↓	54%	52%	59%
On the radio	44%	44%	47%	57%	42%	44%	47%	50%
As outdoor posters/billboards	37%	35%	39%	45%	37%	37%	40%	49% ↑
On Facebook	36%	31%	22% ↓	42%	39%	36%	38%	44%
On YouTube	32%	39%	18% ↓	48% ↑	33%	33%	36%	43% ↑
As online advertising	29%	31%	19% ↓	43% ↑	32%	30%	33%	43% ↑
In newspapers	25%	17% ↓	29%	26%	22%	25%	28%	38% ↑
As indoor posters	25%	28%	20%	40% ↑	25%	26%	28%	38% ↑
On Twitter	25%	26%	13% ↓	27%	29%	26%	29%	41% ↑
Other online videos	25%	28%	15% ↓	30%	26%	25%	29%	42% ↑
On Instagram	22%	26%	10% ↓	34%	24%	22%	27% ↑	34% ↑
As printed brochures	20%	16%	25%	16%	17%	20%	21%	36% ↑
In magazines	19%	15%	20%	22%	16%	19%	22%	32% ↑
As electronic mailouts	19%	16%	18%	12%	18%	19%	23% ↑	33% ↑
MTO Website	19%	16%	16%	26%	18%	19%	22%	31% ↑
On Pinterest	14%	12%	6% ↓	17%	14%	14%	16%	24% ↑

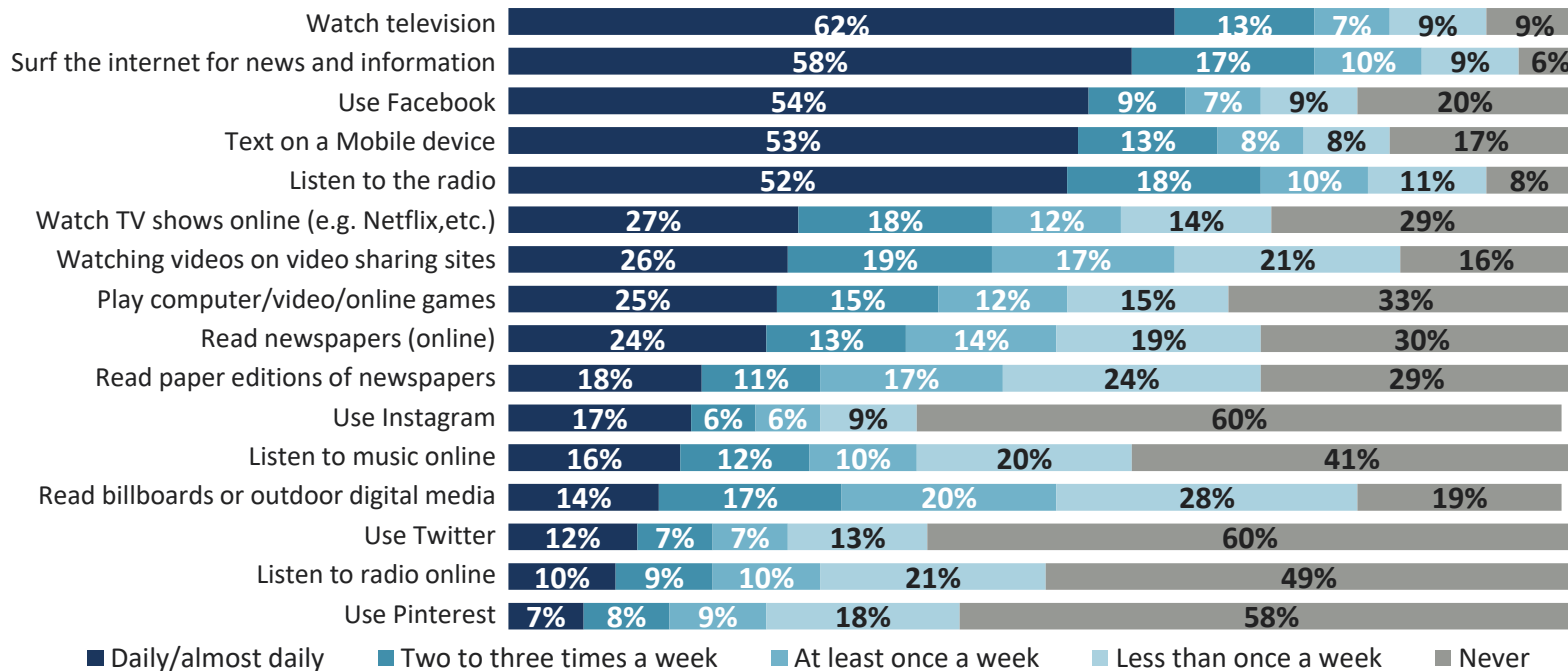
Q16G. When it comes to providing information on road safety, how effective do you think each of the following channels would be?

Base: 2017 target segments – all respondents

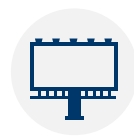
MEDIA CONSUMPTION








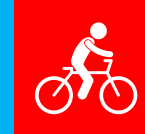
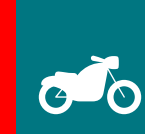
Ontarians are most likely to watch TV or surf the internet on a daily basis, while a majority also use Facebook, text or listen to the radio every day or almost everyday. Around one-quarter watch TV shows online or videos, play video games or read the newspaper online in the same frequency.



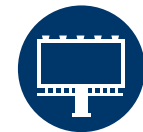
MEDIA CONSUMPTION



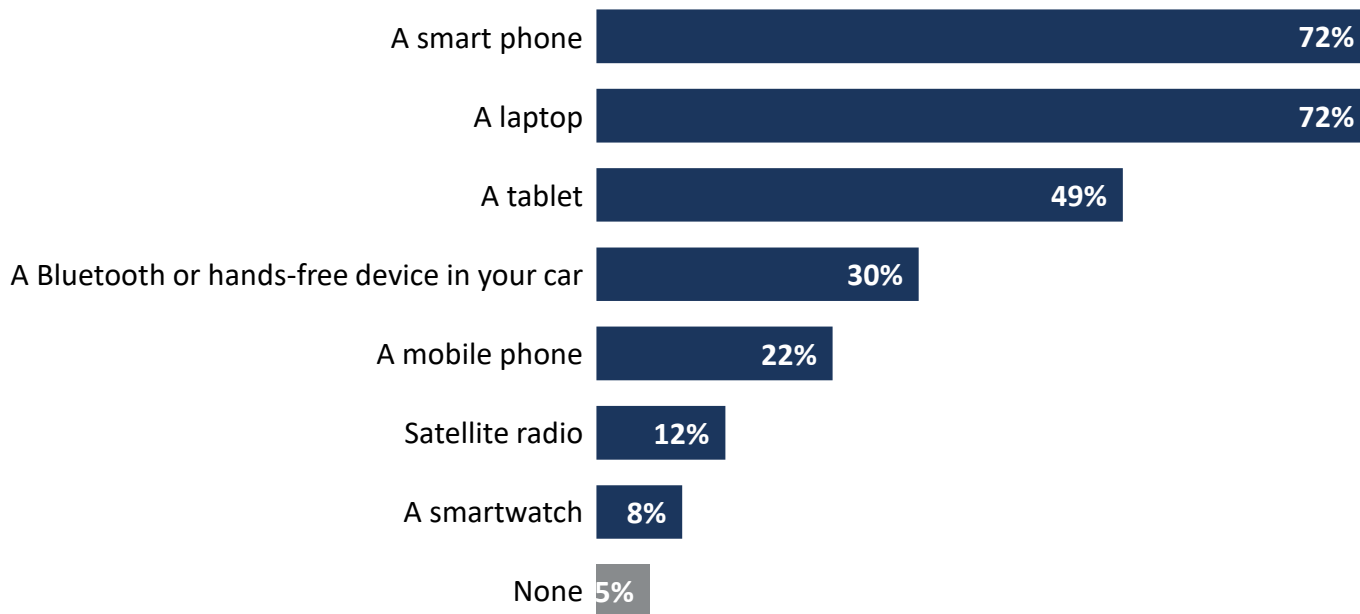
Media consumption habits vary significantly by target segment. Young male drivers, Novice drivers, Drivers 25-55 and Cyclists are more likely than average to text on a daily or almost daily basis but less likely to watch TV. Young male drivers and Novice drivers are also more likely to watch TV shows or videos, listen to music online or use Instagram. Motorcyclists 25-64 are more likely than average to use most forms of social media, while Senior drivers are more likely to watch TV, listen to the radio or read the newspaper but less likely to text or engage in most online or social media behaviours.

Daily/Almost daily	TOTAL	      						
Watch television	62%	43% ↓	86% ↑	32% ↓	57% ↓	61%	58%	62%
Surf the internet for news and information	58%	60%	57%	36% ↓	63% ↑	59%	62%	57%
Use Facebook	54%	53%	44% ↓	47%	57%	55%	52%	53%
Text on a Mobile device	53%	70% ↑	33% ↓	71% ↑	63% ↑	54%	59% ↑	56%
Listen to the radio	52%	46%	64% ↑	34% ↓	56%	52%	54%	50%
Watch TV shows online (streamed on sites like Netflix, etc.)	27%	37% ↑	9% ↓	31%	29%	27%	30%	27%
Watching videos online on video sharing sites like Youtube	26%	47% ↑	8% ↓	53% ↑	28%	27%	32% ↑	41% ↑
Play computer/video/online games	25%	26%	25%	18%	21% ↓	24%	23%	25%
Read newspapers (online)	24%	23%	23%	9% ↓	27%	24%	27%	30%
Read paper editions of daily or weekly newspapers	18%	8% ↓	35% ↑	7%	12% ↓	18%	17%	18%
Use Instagram	17%	30% ↑	3% ↓	47% ↑	18%	17%	21% ↑	25% ↑
Listen to music online	16%	33% ↑	4% ↓	41% ↑	17%	16%	21% ↑	22%
Read billboards or outdoor digital media	14%	15%	17%	10%	14%	14%	15%	22% ↑
Use Twitter	12%	17%	4% ↓	16%	15%	12%	15%	20% ↑
Listen to radio online	10%	11%	10%	4%	12%	10%	12%	18% ↑
Use Pinterest	7%	4%	3% ↓	4%	7%	7%	8%	13% ↑

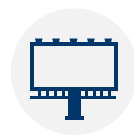
TECH USAGE



The vast majority of Ontarians own and regularly use a smart phone or laptop computer, closer to half have a tablet and three in ten a Bluetooth headset. Fewer have a mobile phone, satellite radio or smartwatch.










TECH USAGE



Young male drivers, Drivers 25-55 and Motorcyclists 25-64 are more likely than average to own a smart phone or a Bluetooth headset and generally Motorcyclists 25-64 are more likely to own every type of technology. Drivers 25-55 and Cyclists are more likely than average to own a tablet and Young male drivers a smartwatch while Seniors are more likely than average to own a mobile phone and less likely to own a smart phone, laptop or smartwatch.

Daily/Almost daily

	TOTAL							
A smart phone	72%	88% ↑	50% ↓	80%	83% ↑	72%	79% ↑	80% ↑
A mobile phone	22%	19%	35% ↑	22%	16% ↓	21%	20%	16%
A laptop	72%	77%	63% ↓	82%	76%	72%	76%	79%
A tablet	49%	42%	46%	39%	54% ↑	49%	54% ↑	67% ↑
A Bluetooth or hands-free device in your car	30%	41% ↑	26%	25%	39% ↑	31%	34%	43% ↑
Satellite radio	12%	17%	13%	16%	15%	12%	14%	24% ↑
A smartwatch	8%	18% ↑	4% ↓	9%	10%	8%	12%	20% ↑

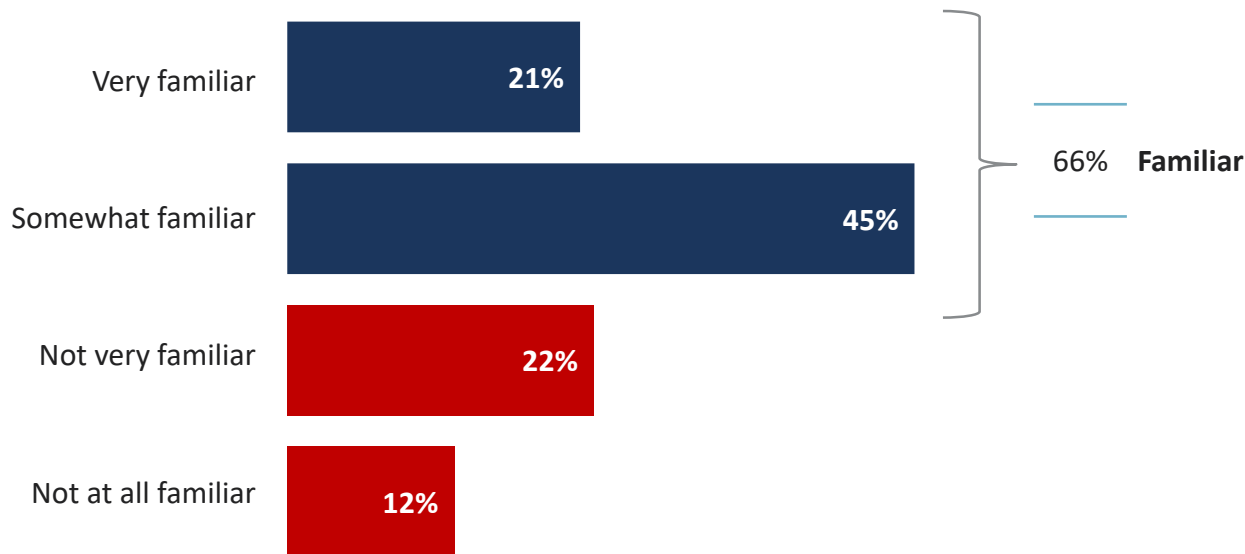


AUTOMATED VEHICLES

FAMILIARITY WITH THE TERM “AUTOMATED VEHICLE”



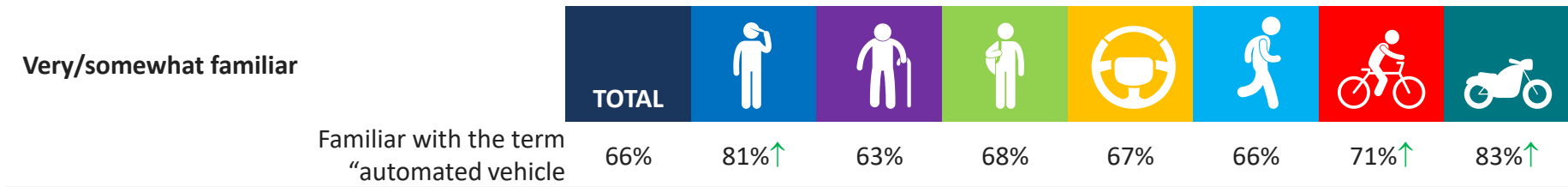
Two-thirds of Ontarians are familiar with the term ‘automated vehicle’ however most are only somewhat familiar.



FAMILIARITY WITH THE TERM “AUTOMATED VEHICLE”



Young male drivers, Cyclists and Motorcyclists are all more likely than average to be very/somewhat familiar with the term ‘automated vehicle’.

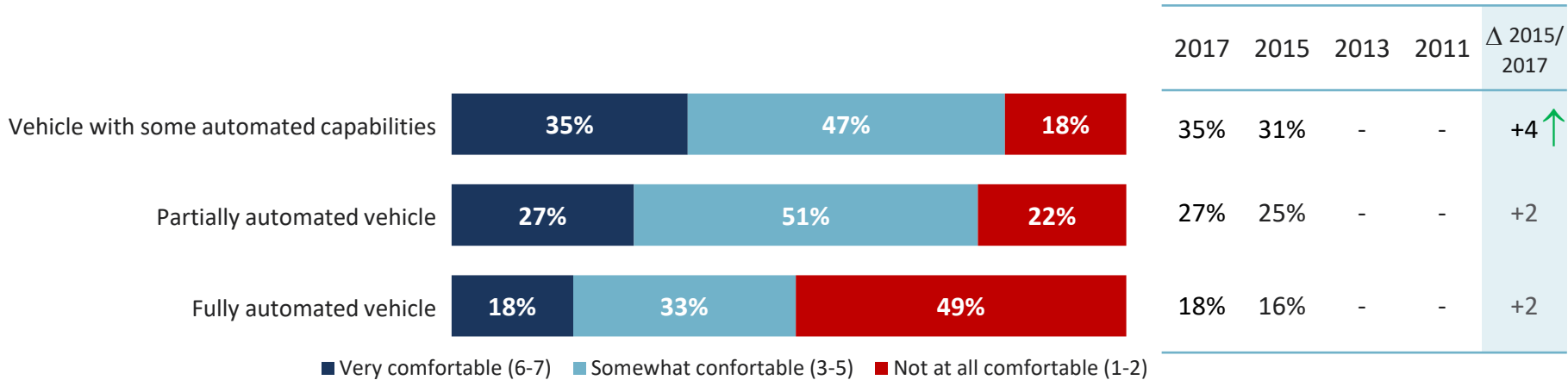


QAV1. How familiar are you with the term “automated vehicle”?
Base: 2017 target segments – all respondents

COMFORT LEVELS WITH AUTOMATED VEHICLES



A minority of Ontarians feel very comfortable with the concept of automated vehicles and most are undecided about partially or some automated capabilities, while fully half are not at all comfortable with the idea of fully automated vehicles. Compared to 2015, more Ontarians feel comfortable with vehicles with some automation.



QAV2. With these definitions in mind, please indicate how comfortable you are with each type of automated vehicle being on the road
Base: All respondents 2017 (n=1431); 2015 (n=1010)

COMFORT LEVELS WITH AUTOMATED VEHICLES



Segments do not differ significantly in their familiarity with semi-automated vehicles. Senior drivers are less open to innovation in this realm and are less likely to be comfortable with fully automated vehicles.

Comfortable (6-7) with each vehicle type	TOTAL							
Vehicle with some automated capabilities	35%	33%	33%	30%	36%	35%	38%	42%
Partially automated vehicle	27%	27%	26%	25%	28%	27%	30%	32%
Fully automated vehicle	18%	18%	12%↓	11%	19%	17%	21%	28%↑

QAV2. With these definitions in mind, please indicate how comfortable you are with each type of automated vehicle being on the road
Base: 2017 target segments – all respondents



SAMPLE CHARACTERISTICS

SAMPLE CHARACTERISTICS



AGE	
16-24	10%
25-44	38%
45-64	43%
65 or older	9%

REGION	
Central	8%
East	12%
GTA 416	21%
GTA 905	26%
Northern	6%
Southwest	27%

GENDER	
Male	49%
Female	51%

SAMPLE CHARACTERISTICS



Licence Type Held

	2017	2015	2013	2011
G	67%	66%	62%	69%
G1/G2	16%	21%	22%	13%
M	5%	5%	6%	5%
M1/M2	2%	3%	2%	1%
Any form A to F	4%	5%	4%	9%
None	12%	8%	11%	11%
Don't Know	4%	4%	4%	2%

Length of time with Licence

	2017	2015	2013	2011
Less than a year	-	3%	7%	2%
1 to 10 years	19%	23%	20%	20%
11 to 20 years	20%	16%	15%	17%
21 to 30 years	19%	17%	18%	22%
31 to 40 years	23%	21%	20%	20%
41+ years	19%	15%	16%	20%
Average years	27	24	24	27



APPENDIX 1- TARGET SEGMENT PROFILES

YOUNG MALE DRIVERS



**A higher proportion
than average...**



**A lower proportion
than average...**

Vulnerable Road Users

- Feel Ontario's roads are safe for pedestrians
- Think that cyclists don't belong on the road
- Walk at night in dark clothing, walk while listening to headphones, or walk while using phone (text or talk)
- Engage in distracted walking or cycling behaviour more frequently and fall into the Moderate category of the Distracted Walking or Cycling Index

- Think distracted, impaired or aggressive pedestrian or cycling actions are dangerous
- Feel that the incidence of walking while texting or talking on their cell phone has increased
- Agree that drivers should take extra precautions when pedestrians and cyclists are on the road

Impaired Driving

- Agree they can handle driving after a few drinks better than most people
- Report driving after using marijuana or having three or more drinks or to have travelled with a driver who was under the influence of alcohol or drugs

- Feel that recreational drug use, consuming three or more drinks, using marijuana, taking Rx or OTC meds or having one or two drinks are dangerous in terms of road safety

YOUNG MALE DRIVERS



**A higher proportion
than average...**



**A lower proportion
than average...**

Other issues	<ul style="list-style-type: none">• Think it's fine to drive tired as long as you're in control, that exceeding the speed limit is not dangerous for skilled drivers, and that driving fast is fun• Report <u>not</u> wearing a seatbelt as a passenger, aggressive driving, exceeding the speed limit in a school zone often and encouraging a driver to drive faster	<ul style="list-style-type: none">• Think speeding, aggressive driving, not reducing speed in poor driving conditions, exceeding the speed limit in a school zone, <u>not</u> wearing a seatbelt or driving while tired are dangerous behaviours• Believe that aggressive driving has increased• Want an increased focus on catching unsafe drivers• Be knowledgeable about proper situations to slow down and move over
Advertising	<ul style="list-style-type: none">• Recall advertising about road safety over the past year – specifically ads about driver training/re-training in general and MADD 911, Road Safety Challenge and Operation Lookout	
Automated Vehicles	<ul style="list-style-type: none">• Be familiar with the term 'automated vehicle'	



 **A higher proportion than average...**

 **A lower proportion than average...**

Vulnerable Road Users	<ul style="list-style-type: none">• Think distracted pedestrian or cycling actions are dangerous• Perceive the incidence of distracted walking and specifically those who talk or text as they walk to have increased• Engage in fewer or no distracted walking or cycling behaviours and fall into the Low or Never categories of the Distracted Waling or Cycling Index	<ul style="list-style-type: none">• Feel that Ontario’s roads are safe for pedestrians or cyclists• Think that Cyclists don’t belong on the road• Engage in dangerous or distracted pedestrian behaviour (walking at night wearing dark clothes, walking while listening to headphones, while reading text messages or talking on a cell phone)
Impaired Driving	<ul style="list-style-type: none">• Believe that driving after recreational drug use or consuming alcohol has increased• Correctly identify the legal BAC limit for fully licensed drivers	<ul style="list-style-type: none">• Agree that they can handle driving after consuming a few drinks better than most people• Report they have driven after any amount of alcohol, or recreational drug use or to have ever travelled with a driver who was under the influence of drugs or with someone who was under the influence of alcohol

SENIOR DRIVERS



 **A higher proportion
than average...**

 **A lower proportion
than average...**

Other issues	<ul style="list-style-type: none">• Think that not reducing speed in poor driving conditions, exceeding speed limit in a school zone or not wearing a seatbelt are dangerous• Feel that aggressive driving has increased• Believe there should be an increased focus on catching unsafe drivers and cyclists/pedestrians, and for better enforcement of road safety laws• Be knowledgeable about proper situations to slow down and move over	<ul style="list-style-type: none">• Think that driving fast is fun• Report that they have exceeded the speed limit on a clear highway, driven aggressively or while tired• Not have worn a seatbelt when travelling in the back seat of a car or to have encouraged a driver to go faster
Advertising	<ul style="list-style-type: none">• Have seen advertising about road safety over the past year or to recall specifics campaign• Recall messaging about school bus safety and aggressive driving	<ul style="list-style-type: none">• Have seen road safety advertng through online sources
Automated Vehicles		<ul style="list-style-type: none">• Be comfortable with a fully automated vehicle

NOVICE DRIVERS



 **A higher proportion
than average...**

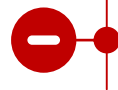
 **A lower proportion
than average...**

Vulnerable Road Users	<ul style="list-style-type: none">• Think Ontario’s roads as safe for pedestrians• Feel that cyclists don’t belong on the road• Report that they frequently engage in distracted walking behaviour and to fall within the ‘High’ category of the Distracted Walking Index	<ul style="list-style-type: none">• Feel that distracted walking (on a cell phone), cycling without a helmet or while listening to headphones are dangerous behaviours• Believe that drivers should be extra cautious when pedestrians are on the road
Impaired Driving	<ul style="list-style-type: none">• Have ever travelled with a driver who was under the influence of alcohol	
Other issues	<ul style="list-style-type: none">• Agree that driving fast is fun• Ride in the back of a vehicle without a seatbelt or exceed the speed limit in a school zone	<ul style="list-style-type: none">• Perceive speeding on a clear highway, driving while tired, or driving when not wearing a seatbelt in the back seat of a vehicle to be dangerous• Feel that road safety laws in the province need to be better enforced• Be knowledgeable about proper situations to slow down and move over
Advertising	<ul style="list-style-type: none">• Recall the MADD 911 campaign in the past year	<ul style="list-style-type: none">• Recall road safety advertising in general

DRIVERS 25-55



**A higher proportion
than average...**



**A lower proportion
than average...**

Vulnerable Road Users

- Report walking while texting or speaking on a cell phone

Impaired Driving

- Have travelled with a driver who was under the influence of alcohol or drugs

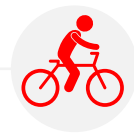
Advertising

- Recall any advertising about road safety over the past year and specifically the 'Arrive Alive Drive Sober' campaign

PEDESTRIANS



- There are no statistically significant differences versus the average for this target group. Fully 97% of the population are classified as pedestrians (% walk outside ever) and therefore their opinions are virtually identical to that of the general population.



**A higher proportion
than average...**



**A lower proportion
than average...**

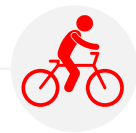
Vulnerable Road Users

- Walk while listening to headphones, or while texting or talking on their cell phone

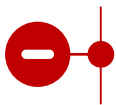
- Think distracted cycling behaviours are dangerous – specifically cycling without a helmet, while listening to headphones, or crossing the street away from intersections in the dark
- Feel that walking at night with dark clothing or crossing the street mid-block are dangerous actions

Impaired Driving

- Think they can handle driving after a few drinks better than most people
- Drive after using marijuana or to have travelled with a driver who was under the influence of drugs or alcohol. Also more likely to have refused to travel with a driver who was under the influence of drugs



**A higher proportion
than average...**



**A lower proportion
than average...**

Other issues

Advertising

- Recall the 'Road Safety Challenge' or local road safety events

- Think that not wearing a seatbelt in the back of a vehicle is dangerous
- Be knowledgeable about proper situations to slow down and move over

Automated Vehicles

- Be familiar with the term 'automated vehicle'

MOTORCYCLISTS 25-64



 **A higher proportion than average...**

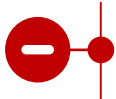
 **A lower proportion than average...**

Vulnerable Road Users	<ul style="list-style-type: none">• Think that cyclists don't belong on the road• Have engaged in distracted, impaired or aggressive pedestrian behavior and to fall in the 'High' category of the Distracted Walking Index	<ul style="list-style-type: none">• Think distracted or impaired cycling behaviours are dangerous- cycling after taking drugs/alcohol, while wearing dark clothing, not wearing a helmet and talking on a cell phone• Believe that drivers should be more cautious when pedestrians and cyclists are on the road
Impaired Driving	<ul style="list-style-type: none">• Think they can handle driving after a few drinks better than the average person• Engaged in impaired driving behaviours or to have travelled with a driver who was under the influence of drugs. Also more likely to have refused to travel with drivers who were under the influence of drugs or alcohol	<ul style="list-style-type: none">• View taking recreational drugs or consuming three or more drinks to be dangerous to road safety• Correctly identify the legal BAC limit for Novice drivers

MOTORCYCLISTS 25-64



A higher proportion
than average...



A lower proportion
than average...

Other issues	<ul style="list-style-type: none">• Feel that speeding on a clear highway is dangerous• Think it's okay to drive when tired as long as you feel in control, that exceeding the speed limit is not dangerous for skilled drivers, and that driving is fun• Report they have exceeded the speed limit in a school zone, do not reduce speed in poor driving conditions, do not wear seatbelts, drive while tired or aggressively or encourage a driver to drive faster	<ul style="list-style-type: none">• Perceive aggressive driving to be dangerous to road safety• Want an increased focus on catching unsafe drivers• Be knowledgeable about proper situations to slow down and move over
Advertising	<ul style="list-style-type: none">• Recall road safety advertising in newspapers or messaging about wearing seatbelts, cyclist safety, driving while tired, and driver training/re-training• Recall the 'Seatbelt Campaign', 'Road Safety Challenge', or 'Operation Lookout' campaigns	<ul style="list-style-type: none">• Recall the 'Arrive Alive Drive Sober' campaign
Automated Vehicles		<ul style="list-style-type: none">• To be familiar with the term 'automated vehicle' and comfortable with a fully automated vehicle