

The Road Safety Authority Advertising Research Summary Review Q.1 2024

- Crashed Lives
- Mobile Distraction
- Weekly/ Monthly stats
- Late Night Audio
- GEO Targeting

March 2024

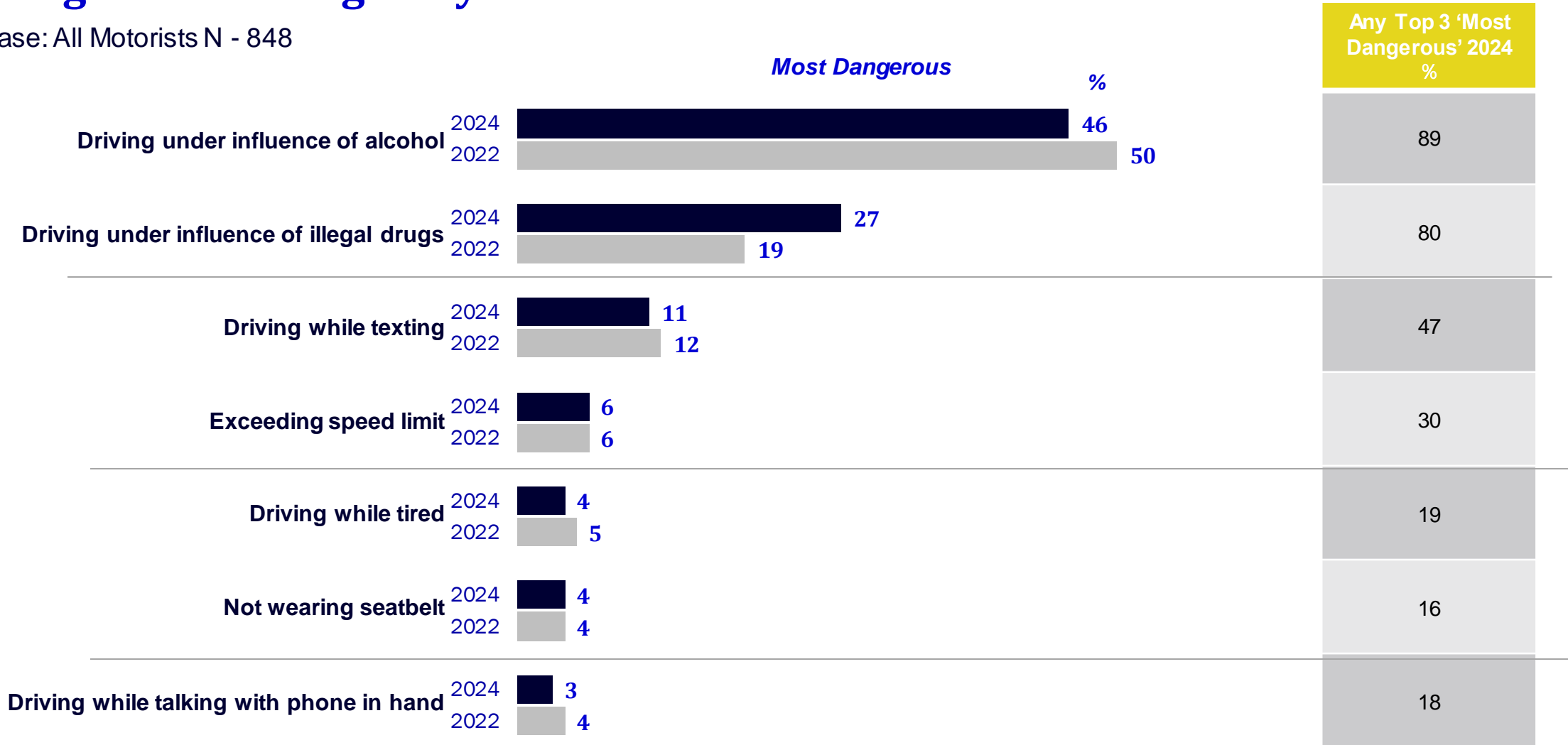
J. 235452



Road safety behaviours (Dangerous Driving & Alcohol)

Dangerous Driving – Key Factors 2024

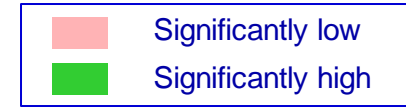
Base: All Motorists N - 848



Driving under influence of alcohol or illegal drugs continue to be perceived as the most dangerous behaviours. Only a minority perceive exceeding speed limit as the most dangerous factor.

Dangerous Driving – Key Factors 2024 (Any Top 3 ‘Most Dangerous’)

Base: All Motorists N - 848



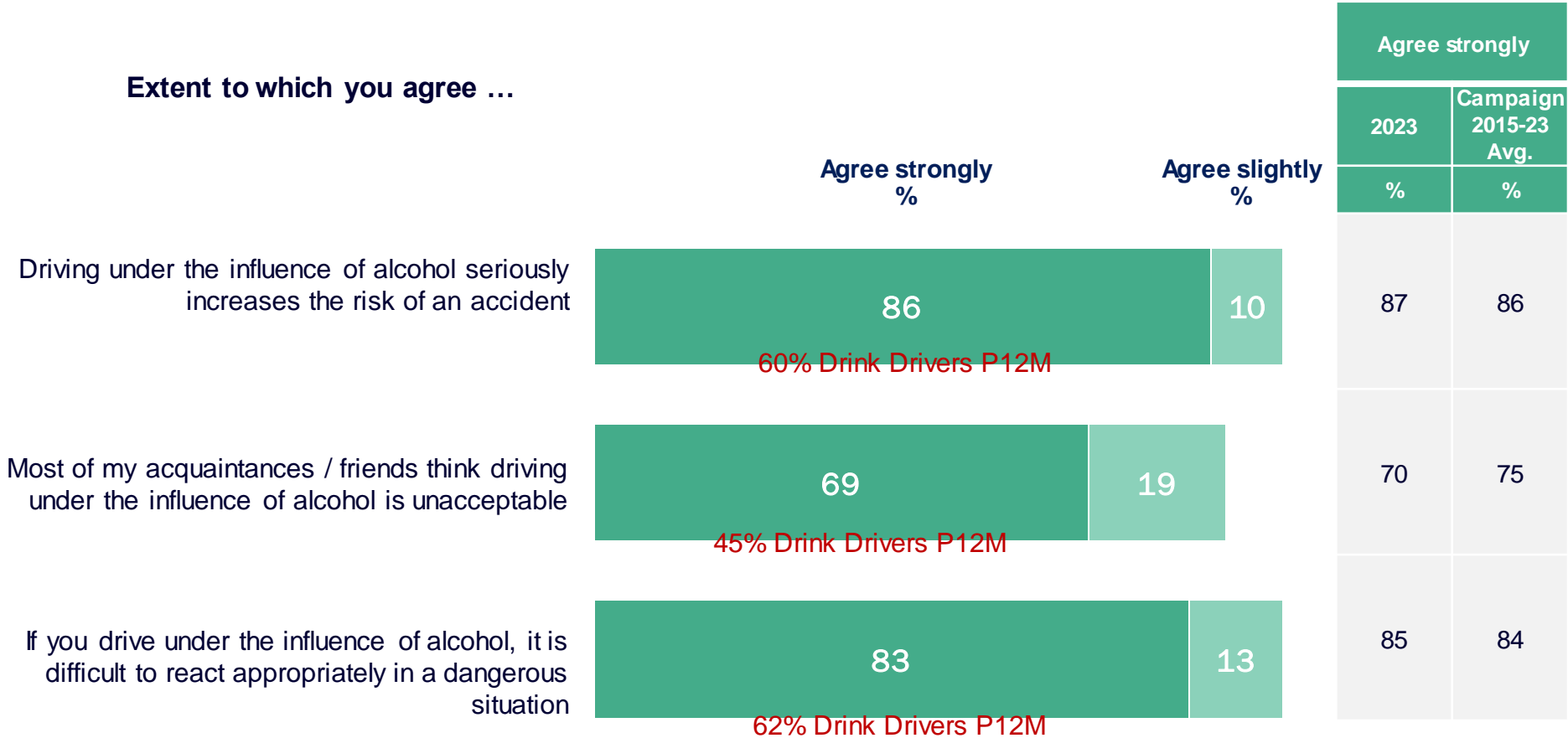
	Total	Gender		Age			Region		Area	
		Male	Female	16-34	35-49	50+	Dublin	Outside Dublin	Urban	Rural
	848	431	417	217	236	395	221	627	569	279
	%	%	%	%	%	%	%	%	%	%
Driving under influence of alcohol	89	88	90	85	88	91	88	89	90	87
Driving under influence of illegal drugs	80	81	78	85	79	77	78	80	80	80
Driving while texting	47	47	47	37	47	53	47	47	46	49
Exceeding speed limit	30	26	34	33	29	29	31	30	30	29
Driving while tired	19	23	16	22	19	18	21	19	20	18
Driving while talking with phone in hand	18	19	17	19	18	18	21	17	18	18
Not wearing seatbelt	16	15	18	19	17	14	14	17	14	19

The rating of the danger factors exhibits a relatively consistent national pattern with the exception of those under 35 years who are less likely to perceive driving while texting dangerous.

Attitudes to Alcohol 2024

Base: All Motorists n - 848

Extent to which you agree ...

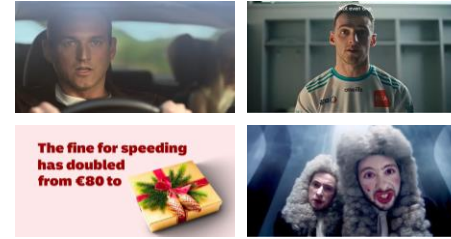


National attitudes on the social acceptability of drinking appear to have again weakened slightly: 69% of motorists now agree that ‘most of my acquaintances/ friends think driving under the influence of alcohol is unacceptable’ versus the research series average of 75%. National sentiments are invariably weaker among ‘drink drivers’.

Young Adult Campaigns

Campaign Awareness: Late Night Audio and GEO Targeting

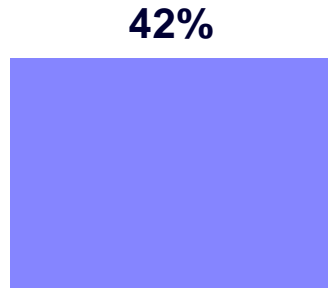
Base: Adults under 35 years n - 433



Late Night Audio %

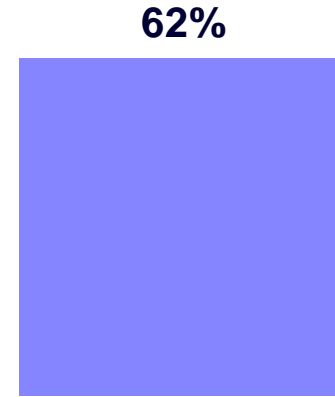
GEO Targeting %

RSA Radio avg. **29%**
(All Motorists)



Motorists -35yrs 42%

- Male 39%
- Female 45%
- 25yrs **52%**
- 25-34yrs 34%
- Dublin 42%
- Ex Dublin 42%
- Urban 41%
- Rural 46%



Motorists -35yrs 64%

- Male 64%
- Female 60%
- 25yrs **72%**
- 25-34yrs 52%
- Dublin 57%
- Ex Dublin 64%
- Urban 59%
- Rural 71%

Both the youth focused campaigns deliver very strong awareness levels: the 42% for Late Night Audio well exceeds the RSA overall radio average; and over 6 in 10 young adults saw the GEO Targeting campaign.

RSA Radio Campaigns 2021-24: Prompted Awareness (Motorists under 35 years)

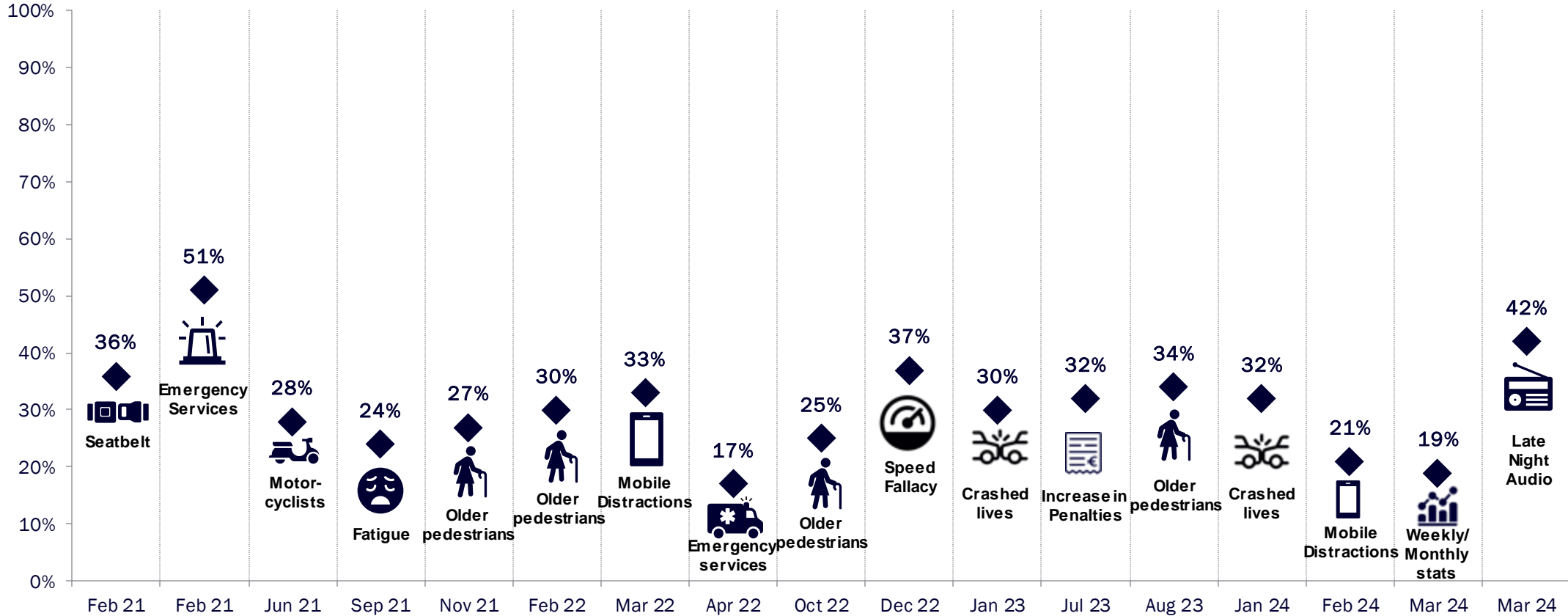


RSA Radio Average (-35yrs)

2021-24

30%

Base: All Motorists



When RSA radio campaigns in recent years are reviewed by young adult motorists, the analysis confirms the excellent performance of 'Late Night Audio' – the campaign's awareness being well above the RSA average of 30% for -35yrs, and it is only the second radio campaign to exceed 40% awareness within that age cohort in recent years.

Campaign Evaluation: Late Night Audio and GEO Targeting

Base: Motorists under 35 years n - 373



Late Night Audio

	Agree strongly %	Agree slightly %	Summary Agree %
As a driver, I am now less likely to drink any amount of alcohol before driving	66	21	87%
As a driver, I am now more likely to ask my friends to wear a seatbelt	64	24	88%
As a driver, I am now less likely to use my mobile phone when driving	63	25	88%
As a driver, I am now less likely to drive under the influence of drugs	60	18	78%
As a driver, I am now more likely to slow down	53	31	84%



GEO Targeting

	Agree strongly %	Agree slightly %	Summary Agree %
As a driver, I am now less likely to drink any amount of alcohol before driving	66	20	86%
As a driver, I am now more likely to ask my friends to wear a seatbelt	68	20	88%
As a driver, I am now less likely to use my mobile phone when driving	65	20	85%
As a driver, I am now more likely to slow down	63	23	86%

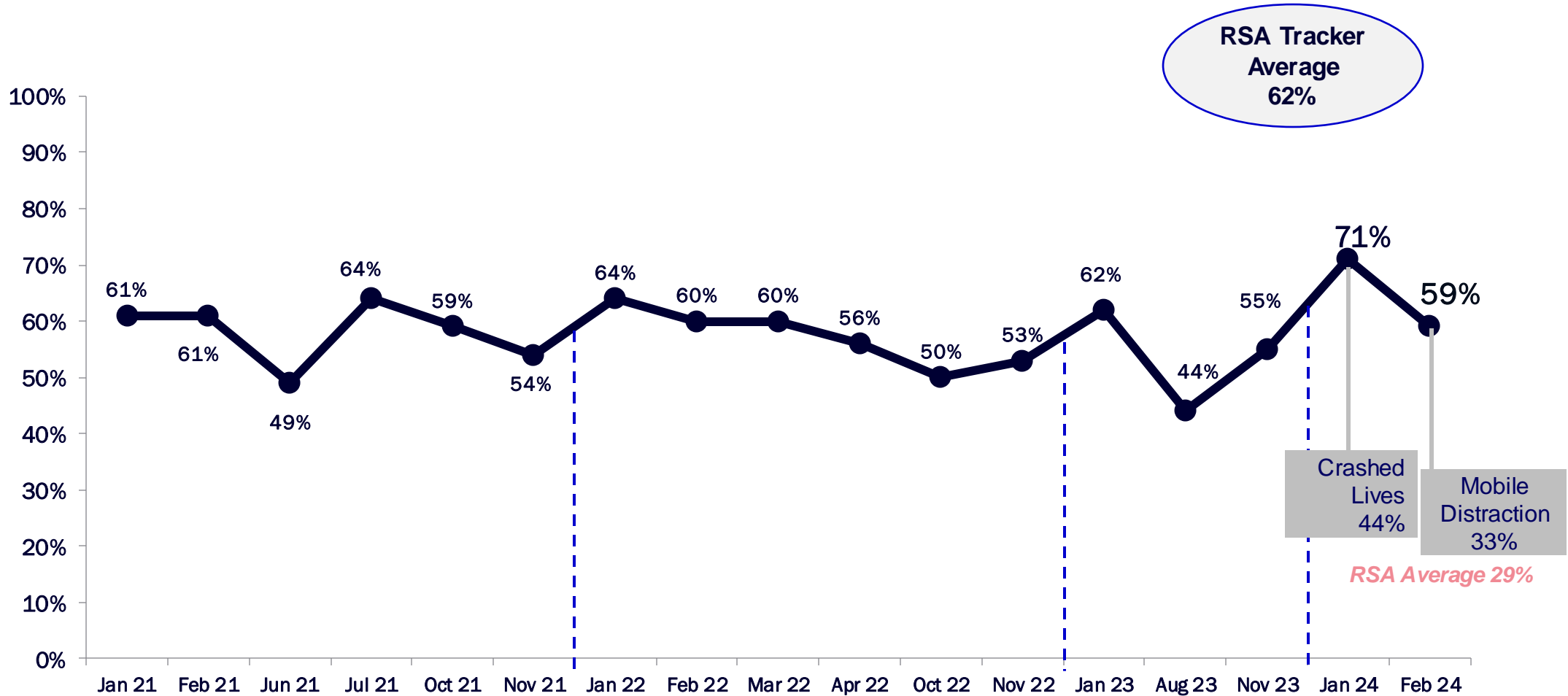
Over 8 in 10 young motorists are positively influenced by either campaign on practically all the behaviour change criteria, peaking on the criteria for seatbelts and mobile phone use.



Advertising: Awareness

Spontaneous Awareness of Road Safety Advertising

Base: All Motorists

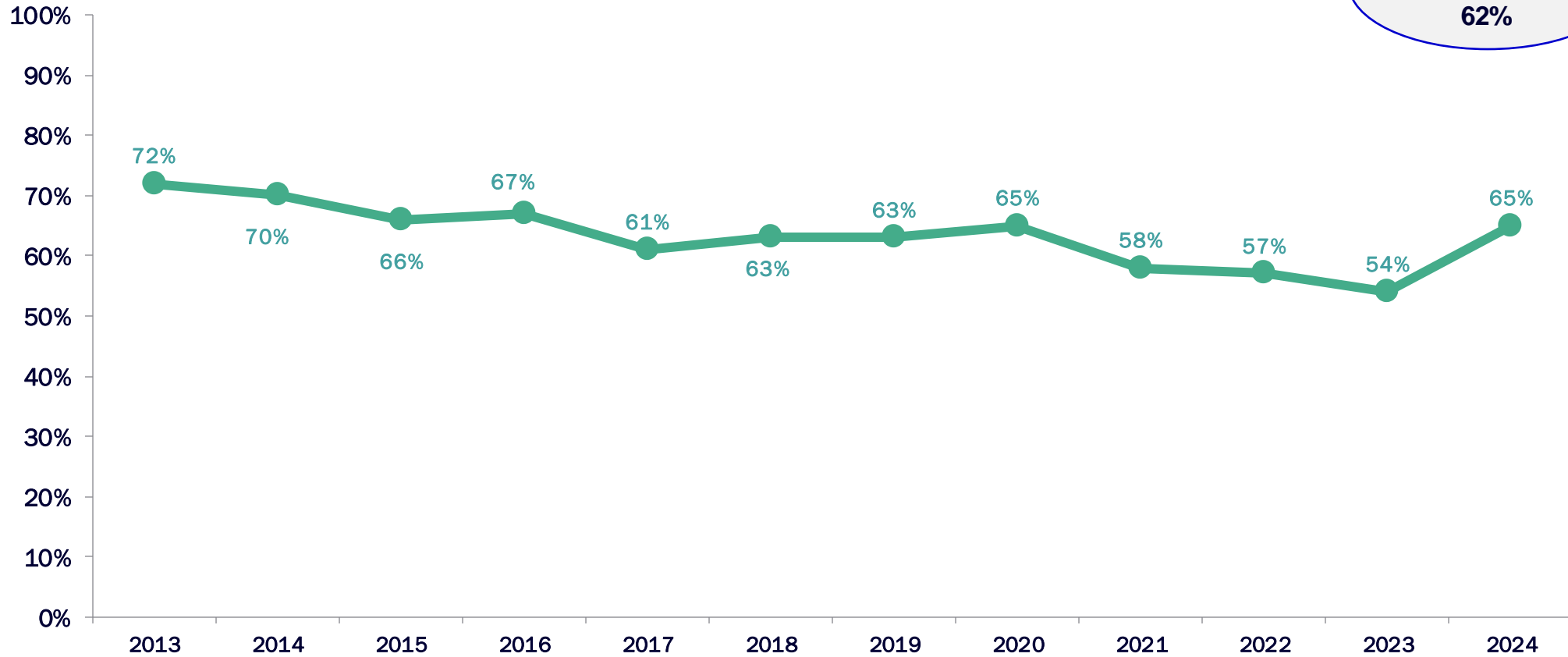


The impact of the Crashed Lives campaign on spontaneous recall of road safety advertising is again evident in January 24.

Spontaneous Awareness of Road Safety Advertising 2013 – 2024

Base: All Motorists

RSA Tracker
Average
62%



Spontaneous recall of road safety advertising has shown a downward trend from 2021-2013 (rebounding this year due to Crashed Lives).

Prompted awareness of RSA TV Campaigns Q1 2024

Base: All motorists

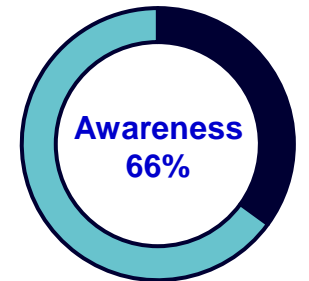
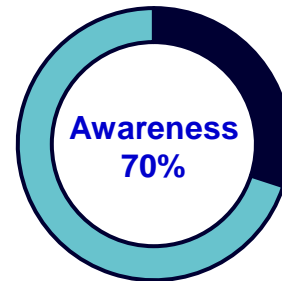
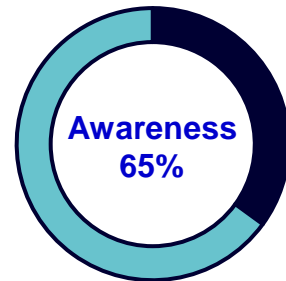
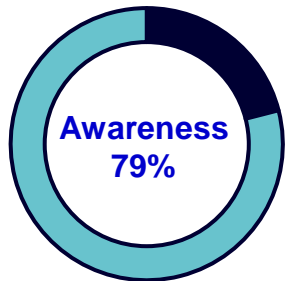


**Crashed Lives
(Gillian)**

**Crashed Lives
(Siobhan)**

**Mobile
Distraction**

**RSA TV
Average**

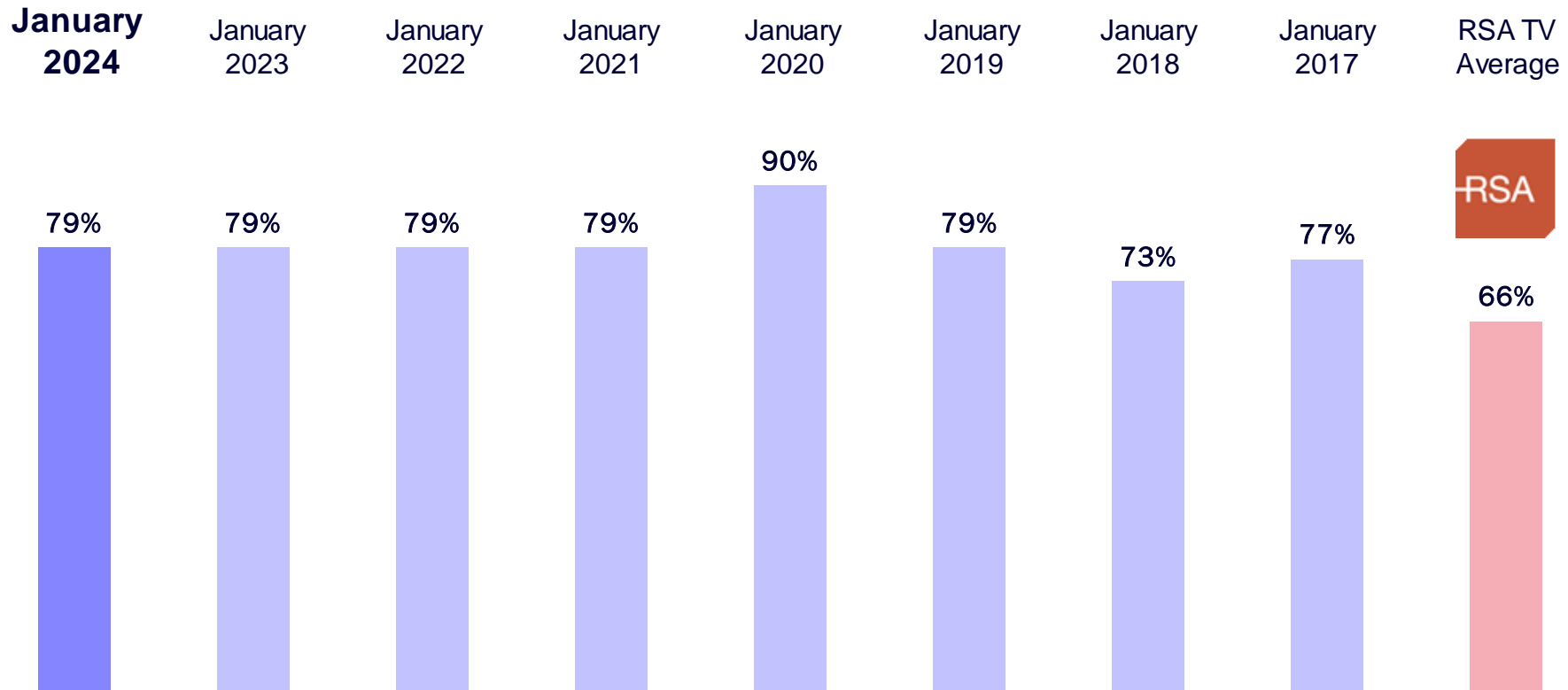


Each of the RSA TV campaigns of 2024 has delivered awareness levels at or beyond the strong RSA TV average.

Prompted Awareness of Crashed Lives TV Campaign: 'Gillian'



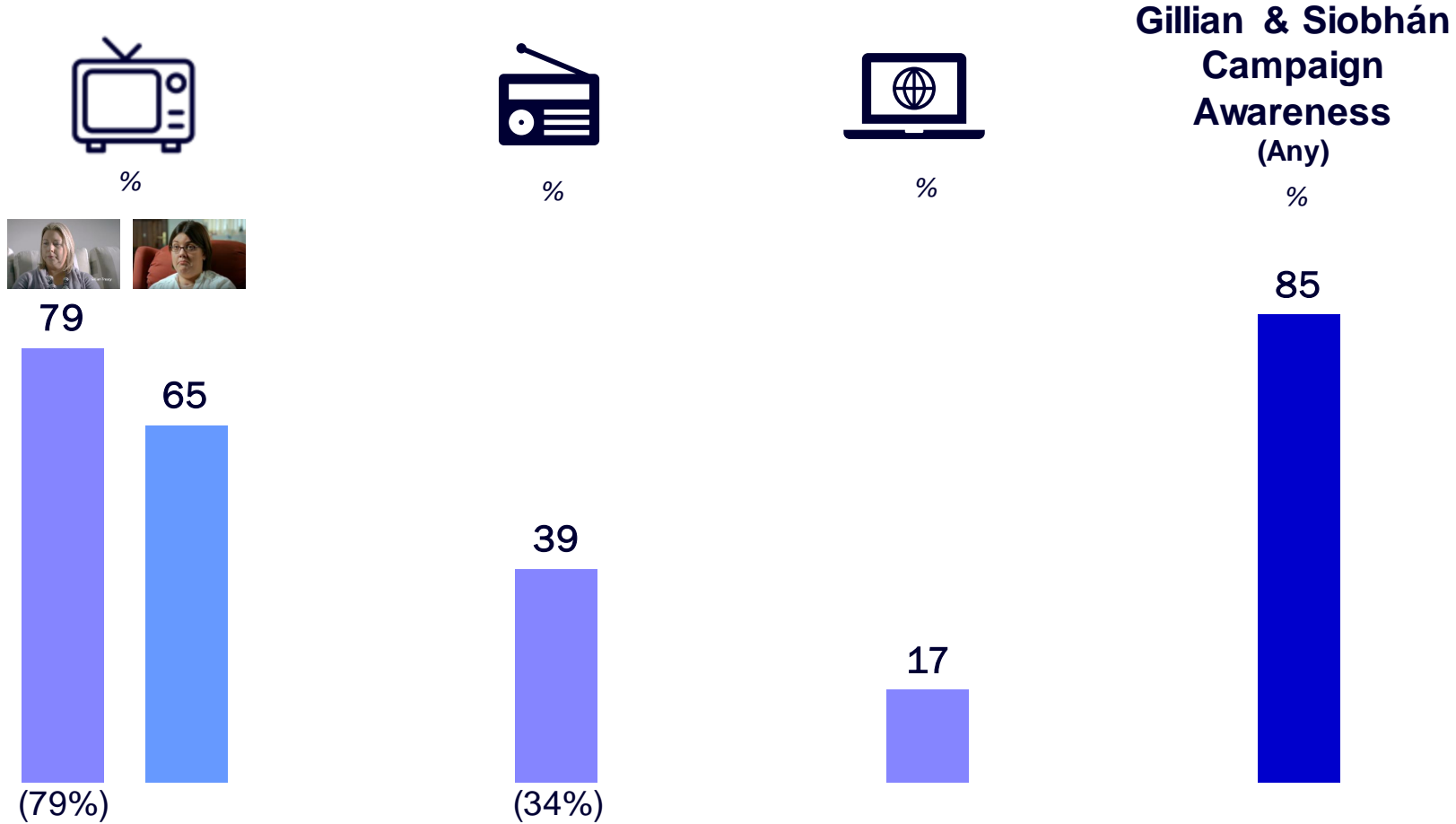
Base: All Motorists n - 848



The 'Gillian' TV advertisement continues to set the bar for the highest level of prompted awareness among the impressive portfolio of RSA Campaigns. Its level of awareness is again at 79% of all motorists which is well above the impressive RSA average.

Total Awareness of 'Gillian' and 'Siobhán' Crashed Lives Campaign 2024

Base: All Motorists n - 848



Awareness of the 'Gillian' Crashed Lives radio campaign has risen to 39% in 2024. A remarkable 85% of motorists are aware of at least one of the 'Gillian' or 'Siobhan' Crashed Lives campaigns in 2024.

Total Awareness of Crashed Lives Campaign 2024

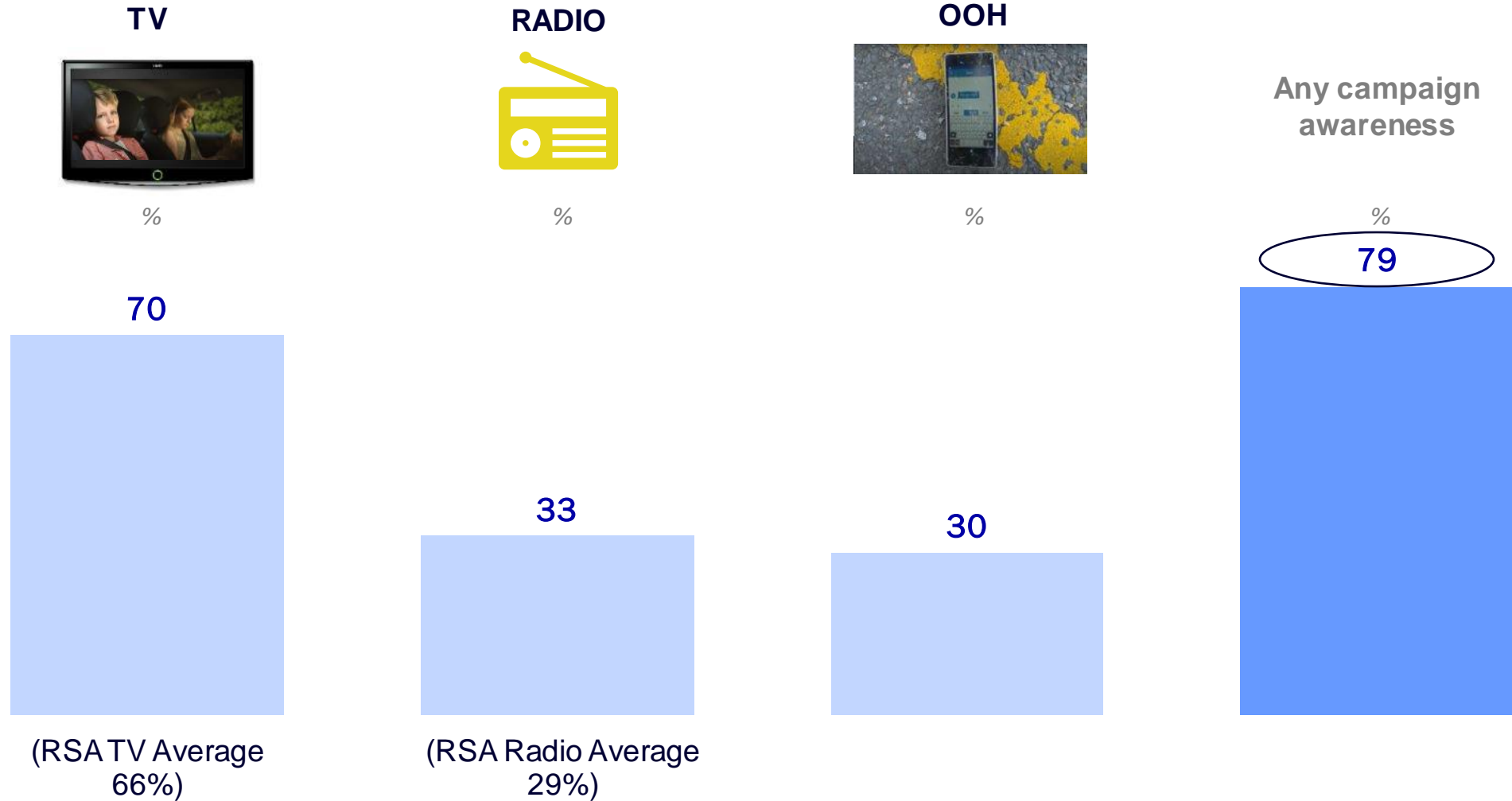
Base: All Motorists

	Total	Gender		Social Class		Age				Region		Area	
		Male	Female	ABC1	C2DE	-35	35-49	50-64	65+	Dublin	Ex Dublin	Urban	Rural
	848	405	443	455	393	177	260	239	172	233	615	595	253
	%	%	%	%	%	%	%	%	%	%	%	%	%
Gillian TV	79	79	78	77	80	66	80	84	84	79	79	78	80
Siobhán TV	65	65	66	65	66	48	64	74	77	64	66	64	68
Gillian Radio	39	37	40	33	44	32	35	41	47	40	38	39	38
Gillian online	17	17	18	14	21	22	14	16	18	20	16	19	15
Any Gillian	82	82	82	81	83	72	83	86	88	84	81	81	84
Any Gillian or Siobhán	85	85	85	85	85	75	86	89	91	86	85	84	87

Any campaign awareness is highly impressive across all the demographic groups. The only caveat is the dip in awareness among motorists under the age of 35 years: while online campaign awareness does peak among this group, it does not compensate fully for the lower TV awareness.

Total Awareness of Mobile Distraction Campaign 2024

Base: All Motorists N - 848



Almost 8 in 10 motorists are aware of at least one element of the Mobile Distraction campaign.

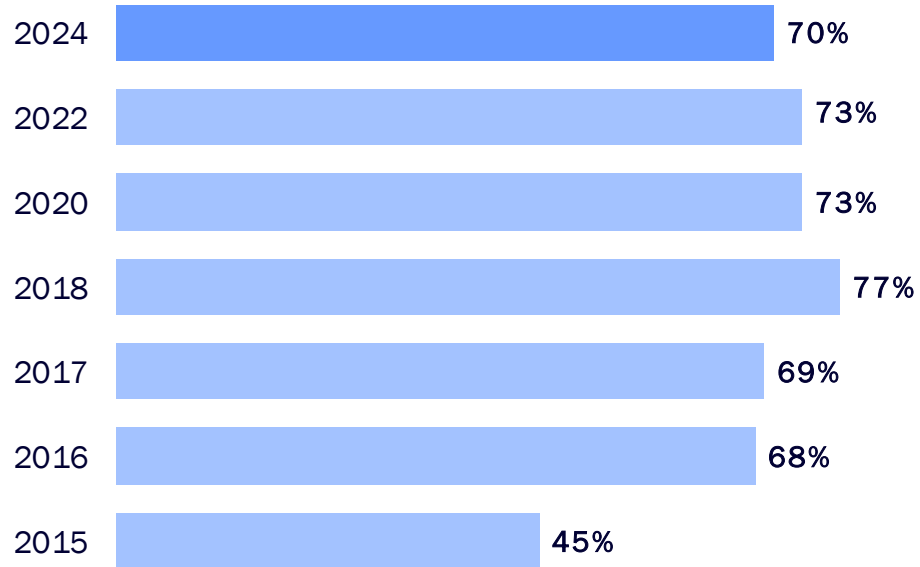
Q.9 Could you tell us whether you recall seeing it recently?

Q.13b We are going to show you a recent outdoor poster advertisement. Please tell us whether you recall seeing it?

Q.14 Could you tell us whether you recall hearing it recently?

Mobile Phones TV Campaigns: Prompted Awareness

Base: All motorists



70% of motorists recall the TV campaign which is a marginally lower in comparison to previous years.

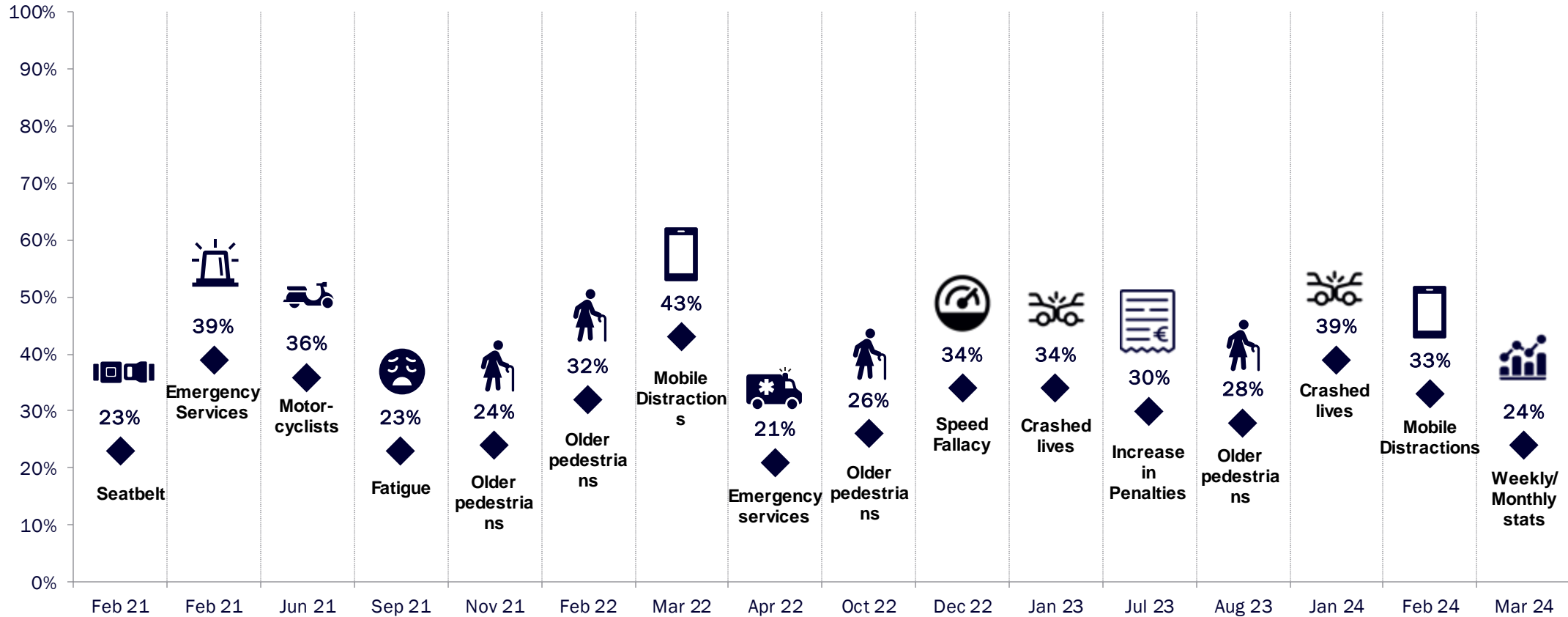
RSA Radio Campaigns 2021-24: Prompted Awareness

Base: All Motorists



RSA Radio Average

2021-24 29%



The radio ads for both Crashed Lives and Mobile Distraction in 2024 exceed the RSA radio average. 24% of motorists recall the weekly/monthly stats radio campaign (with this awareness peaking among those 65 years+ and in Dublin).

Total Awareness of Mobile Distraction Campaign 2024

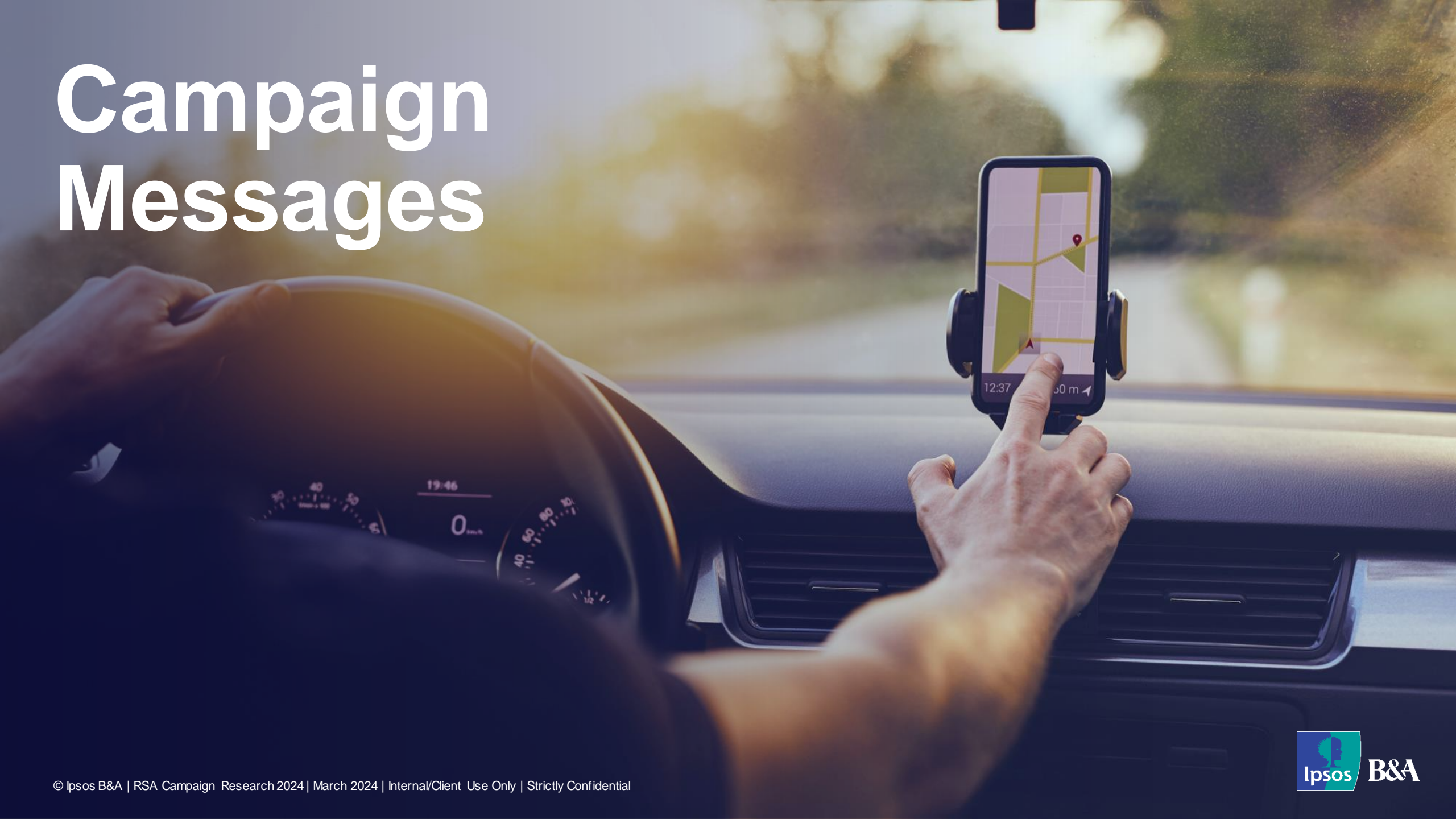
Base: All Motorists N - 848

	Significantly low
	Significantly high

	Total	Gender		Age			Social Class		Region		Area		Mobile Danger Group
		Male	Female	-35	35-49	50+	ABC1F	C2DE	Dublin	Outside Dublin	Urban	Rural	ANY
	848	431	417	217	236	395	446	402	221	627	569	279	174
	%	%	%	%	%	%	%	%	%	%	%	%	%
TV	70	69	72	62	69	76	71	70	72	70	69	73	70
Radio	33	31	36	21	33	40	34	33	35	33	31	38	34
OOH	30	28	32	40	28	25	32	27	35	28	30	29	32
Any	79	76	83	73	80	82	80	78	80	79	78	81	78

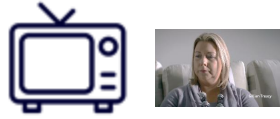
Recall of the Mobile Distraction campaign is strong across all demographics. Recall of OOH advertisement peaks among those under 35 years while TV and radio peak among those aged 50+.

Campaign Messages

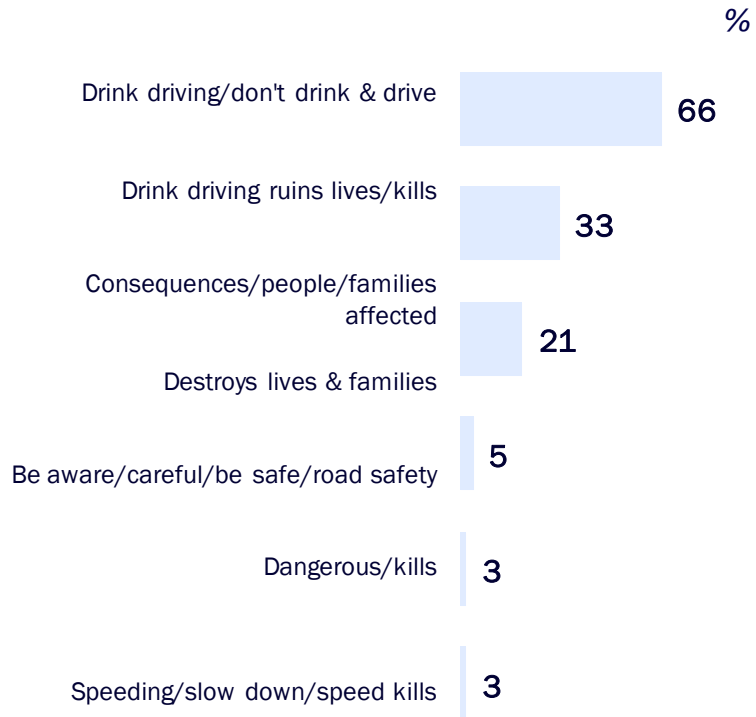


Crashed Lives Campaign 2024 'Gillian and Siobhán': Key Messages

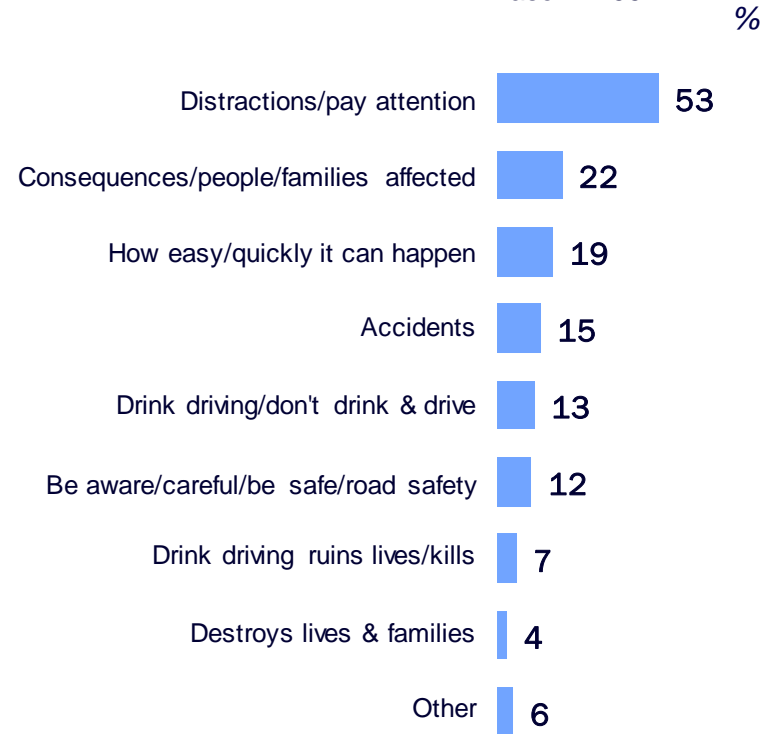
Base: Motorists aware of the ad



Base: n - 660



Base: n - 552



All others 2% or less

Both campaigns deliver strong dominant messages. The consequences of a collision, as well as the speed with which it can happen, are strong secondary messages.

Crashed Lives Key Messages: Summary x media

TV 'Gillian'

Base: n - 660

Drink driving/don't drink & drive	66%
Drink driving ruins lives/kills	33%
Consequences/people/families affected	21%

TV 'Siobhán'

Base: n - 552

Distractions/pay attention	53%
Consequences/people/families affected	22%
How easy/quickly it can happen	19%

Online 'Gillian'

Base: n-145

Don't drink & drive/Drink aware	66%
Impact/Consequences of drink driving/RTAs	37%
Drive carefully/Road Safety	10%

Radio 'Gillian'

Base: n-322

Drink driving/don't drink & drive	67%
Drink driving ruins lives/kills	34%
Consequences/people/families affected	26%

Each media in the Crashed Lives campaign delivers a strong central message.

Mobile Distraction: Key Messages 2024

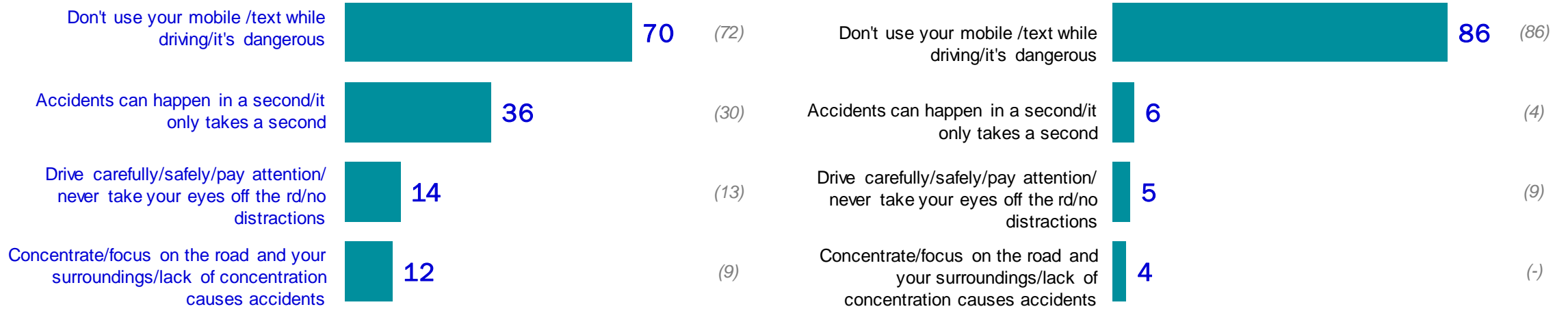
Base: Motorists aware of campaign



Base
581
%



Base
276
%



() 2022
All others 3% of less

The key message of the Mobile Distraction campaign is very well delivered with the majority of motorists recalling 'Don't use your mobile/text while driving/ it's dangerous'.

Campaign Evaluation

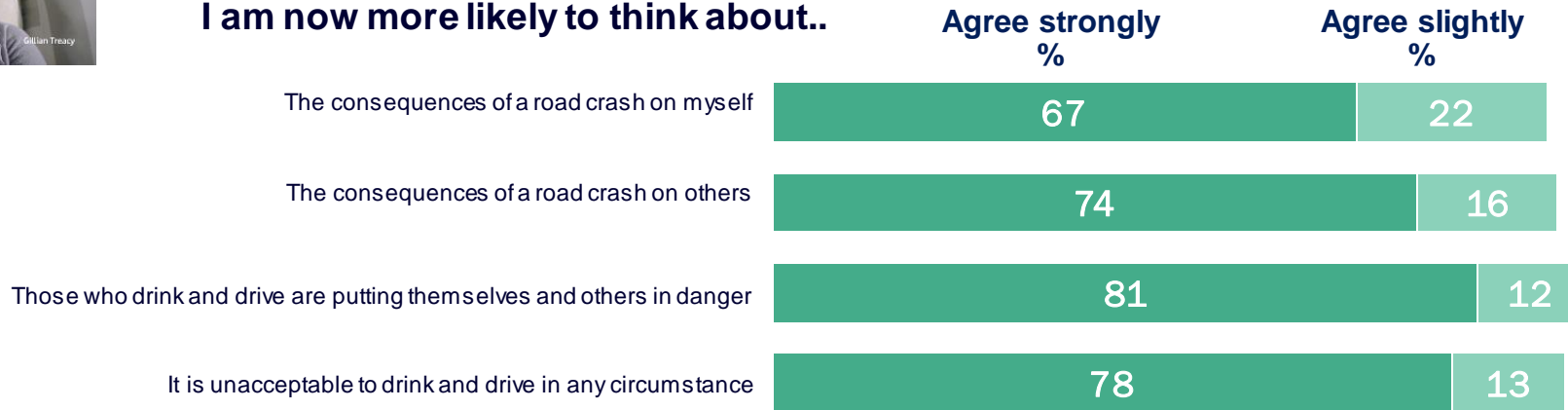
Gillian Treacy

Crashed Lives 2024 'Gillian' Campaign: Advertising Impact/Behaviour Change

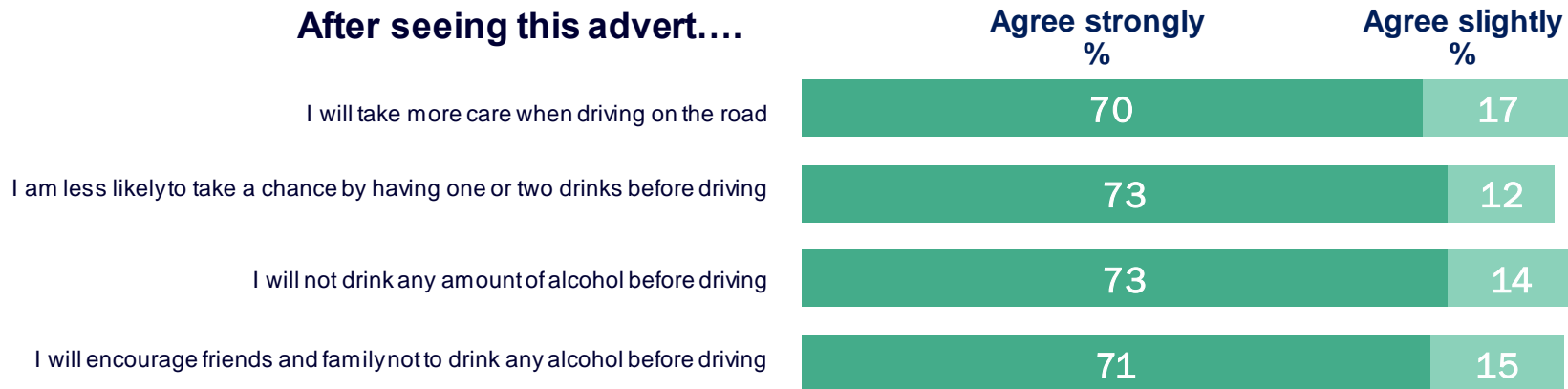
Base: All Motorists n - 848



I am now more likely to think about..



After seeing this advert....



Agree Strongly		
2023	Campaign 2017-23 Avg.	RSA Average
%	%	%
64	70	65
73	76	65
76	79	65
76	77	65
66	71	65
71	74	65
72	75	65
69	73	65

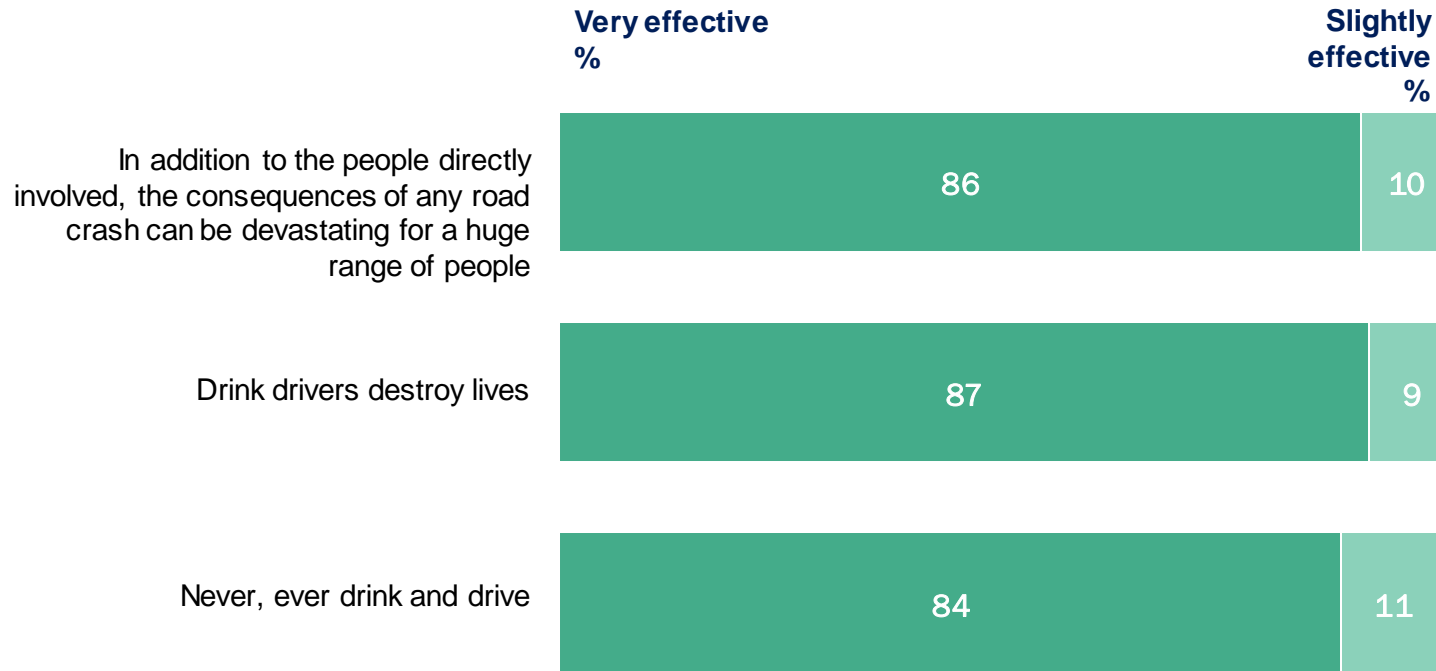
The impact and behavioral change evaluation of the 'Gillian' campaign remains very positive and has actually improved year on year on each of the criteria. The campaign evaluation also remains very comparable with the averages specific to the campaign.

Crashed Lives 2024 'Gillian' Campaign: Perceived Effectiveness

Base: All Motorists n - 848



How effective is this advertisement in demonstrating each of the following..

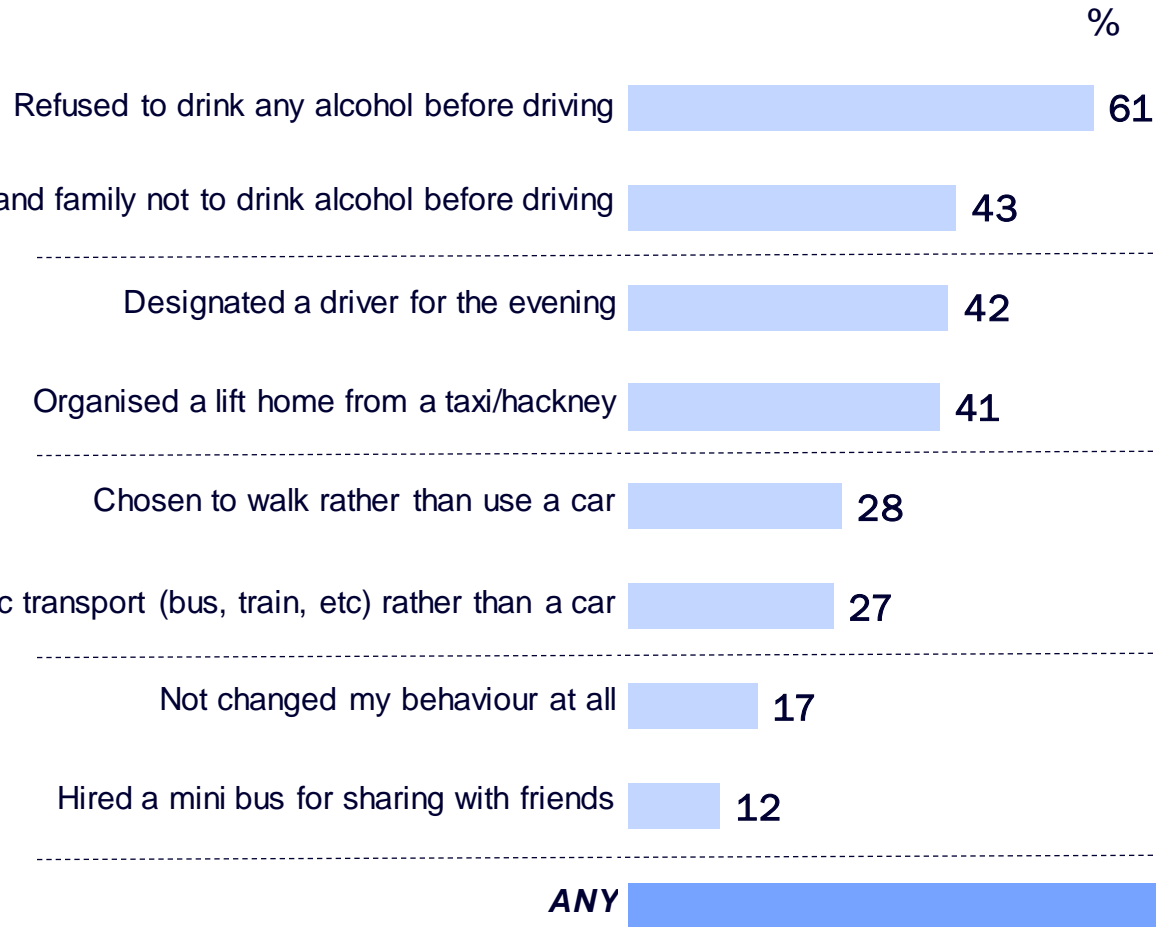


Very effective		
2023	Campaign 2017-23 Avg.	RSA Average
%	%	%
84	84	72
87	86	72
83	84	72

The Crashed Lives 'Gillian' campaign continues to set the standard for the perceived effectiveness evaluation among RSA campaigns.

Actions Prompted by Crashed Lives 2024 'Gillian' Campaign

Base: Motorists aware of campaign n - 660



2023	Campaign 2017-23 Avg.
%	%
56	52
42	37
37	35
43	30
27	19
25	25
10	15
21	16
79	81

'Drink Drivers' P12M 86%

In a further confirmation of the effectiveness of the campaign, 83% of motorists aware of the campaign have been more likely to adopt one of the listed behaviours when planning a social outing that might involve the consumption of alcohol (because of the Crashed Lives 'Gillian' campaign). Impressively and encouragingly, 86% of 'drink drivers' have also adopted one of the behaviours.

Crashed Lives 2024 'Siobhán' Campaign: Advertising Impact/Behaviour Change

Base: All Motorists n - 848



I am now more likely to think about..



Agree Strongly	
'Gillian' 2024	RSA Average
%	%
67	65
74	65

After seeing this advert....



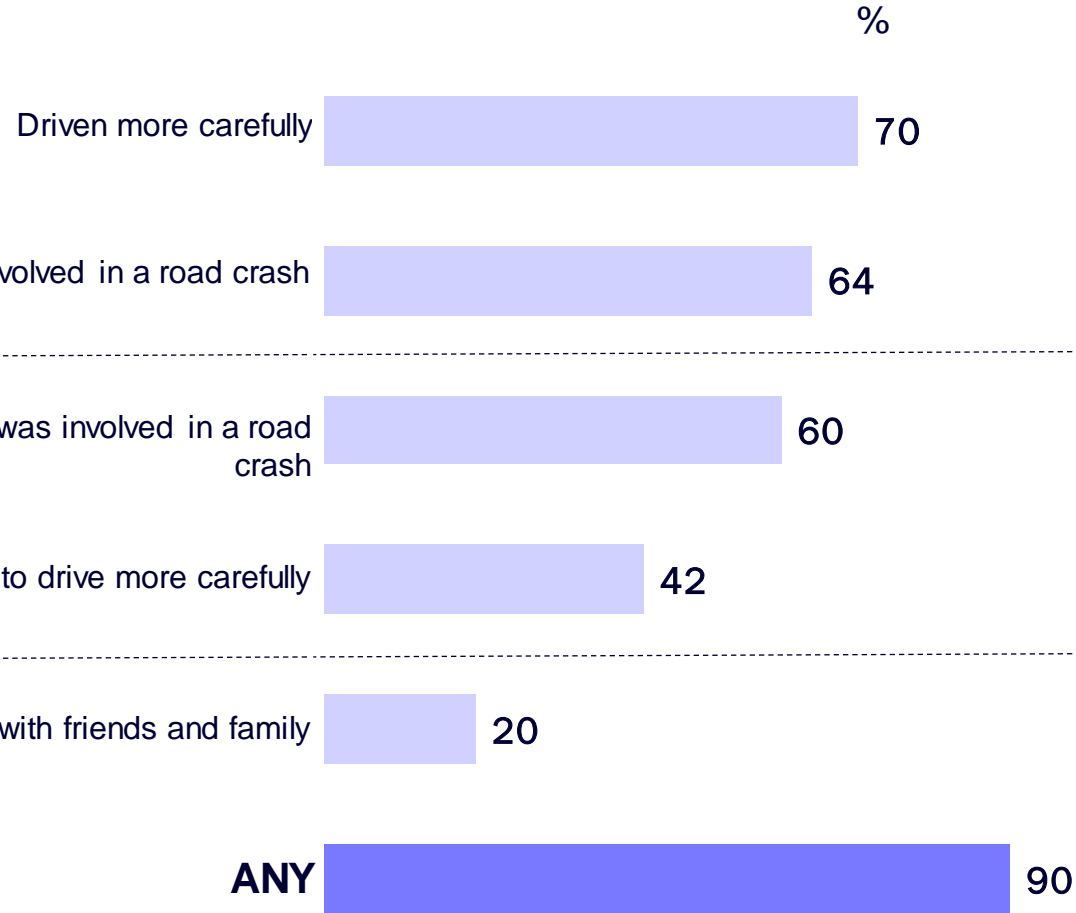
70	65
71	65

At re-launch for the 'Siobhan' campaign, the impact and behavioral change evaluations are highly impressive, being directly comparable to those of 'Gillian' and exceeding the RSA average.



Actions Prompted by Crashed Lives 2024 'Siobhán' Campaign

Base: Motorists aware of campaign n - 552



A highly impressive 90% of motorists aware of the 'Siobhán' campaign have been more likely to adopt one of the behaviours after watching the TV campaign.

Mobile Distraction TV Campaign: Road safety knowledge & Behavioural Change 2024

Base: All Motorists N – 848



RSA
Average
65%



	Agree Strongly %		Agree strongly			Agree strongly Danger Group %
	2022 %	2020 %	2022 %	2020 %	2018 %	
The advertisement has made me realise that being distracted for even a second while driving can have devastating consequences	81	12	75	82	73	76
It's going to make me think twice about using a mobile phone whilst driving myself	75	14	72	78	71	70
After seeing this advertisement, I feel confident that I will focus on my driving without being distracted by my desire to use my mobile phone	73	15	66	69	73	64
It's going to make me think twice about having a phone conversation with someone who is using their phone while they are driving	71	17	68	71	69	62
The advertisement will stop me from holding a mobile phone when driving	71	16	67	*	*	61
As a driver, I am now more likely to put my mobile phone out of reach while driving	67	16	63	67	68	57
After seeing this advertisement, I now know more about how to manage my desire to use my mobile phone while I am driving	65	17	60	63	69	58

The TV campaign remains very strong with near all statements exceeding the RSA average and registering improvements in comparison to 2 years ago.

Mobile Distraction TV Campaign: Effectiveness 2024

Base: All Motorists N - 848



RSA
Average
72%

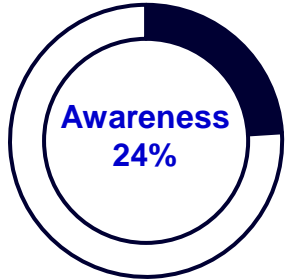


	Very effective %	Fairly effective %	Very Effective			Very Effective Danger Group %
			2022 %	2020 %	2018 %	
A driver who is using a mobile phone can't properly concentrate on driving	81	16	82	84	79	74
Using a mobile phone whilst driving greatly increases the chance of a crash	81	16	80	84	80	76
Being distracted for even a second while driving greatly increases the chance of a crash	81	15	85	86	81	81

The perceived effectiveness of the Mobile Distraction campaign remains highly impressive for each criteria.

Weekly/ Monthly Stats Radio Campaign Road Safety Knowledge & Behavioural Change

Base: All Motorists N - 848



	Agree Strongly %	Agree slightly %	Summary Agree %
As a driver, I am now more aware of the numbers of people being killed or injured on the roads	60	28	88
As a driver, the thought of being included in those statistics motivates me to reflect on my driving behaviour	57	28	85
As a driver, I am now more likely to take extra care on the road	53	31	84

The weekly/monthly stats campaign is evaluated strongly across the knowledge and behavioural change criteria with 84% of motorists agreeing they are now “more likely to take extra care on the road”.

Key Learnings



Crashed Lives (Gillian) Campaign Summary

Base: All motorists



Crashed Lives (Gillian & Siobhan) Campaign Summary

	Gillian 2024	Gillian Campaign Avg.		Siobhan 2024
	%	%		%
Spontaneous Awareness <i>(aware of road safety advertising)</i>	44	48		
Prompted awareness	79	79		65
High exposure awareness <i>(aware of campaign)</i>	61	61		50
Behavioural change positive (Average)	73	74		71
Perceived effectiveness (Average)	86	85		




RSA Campaign Average %

29
66
39
65
72

Both the 'Gillian' and 'Siobhan' campaigns have performed impressively in 2024. 'Gillian' has maintained the very high level of performance of previous years and actually shows year on year improvement, which is close to remarkable giving the long running nature of the campaign. After a considerable gap, the relaunch of 'Siobhan' has been very well received both in terms of awareness and evaluation.

Mobile Distraction Campaign Summary

Base: All motorists N – 848

	Mobile Distraction Campaign Summary			 RSA Campaign Average %
	2024	2022	2020	
	%	%	%	
Spontaneous awareness <i>(aware of road safety advertising)</i>	33	39	49	29
TV campaign awareness	70	73	73	66
High exposure awareness <i>(aware of campaign)</i>	57	56	60	39
Behavioural change positive (Average)	72	67	72	65
Perceived effectiveness (Average)	81	82	85	72

After a 2-year break, the Mobile Distraction TV campaign has performed excellently. While spontaneous cut through has declined, it still remains above the RSA average, and prompted awareness and high exposure remain as strong as ever. Of particular note is that the behavioral change evaluation for the campaign has actually improved on 2022, and perceived effectiveness remains far ahead of the impressive RSA average.



Young Adult Campaign Summaries

Awareness

Late Night Audio

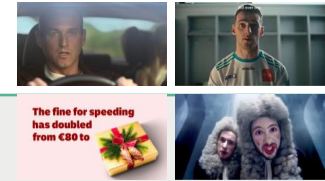


- The 42% awareness level for the Late Night Audio campaign among young motorists well exceeds the RSA overall radio average; awareness peaks at 42% among those under 25 years.

Evaluation

- The Late Night Audio campaign is very well evaluated among young motorists on the behaviour change criteria: 89% agree they are now less likely to drink any amount of alcohol before driving; and 84% agree they are now more likely to slow down.

GEO Targeting



- An impressive 62% of young adults saw the GEO Targeting campaign, peaking among those under 25 years and in rural areas.

- Over 8 in 10 young motorists are positively influenced by the Geo Targeting campaign on each of the behavior change criteria, OK with 88% of young motorists agreeing they are now more likely to ask their friends to wear a seat belt.

Thank you.

Name:

JOHN
O'MAHONY

Details:

john.omahony@ipsos.com

Name:

LAURA
BARBONETTI

Details:

laura.barbonetti@ipsos.com



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Appendix



Crashed Lives 2024 'Gillian' Campaign: Advertising Impact/Behaviour Change

Base: All Motorists n - 848

Agree strongly	Total	Age		Region		Area		Driven after drink	
		-34	35+	Dublin	Ex Dublin	Urban	Rural	Yes	No
<i>Base:</i>	848	177	671	233	615	595	253	84	758
	%	%	%	%	%	%	%	%	%
I am now more likely to think about the consequences of a road crash on myself	67	61	68	64	68	66	68	53	69
I am now more likely to think about the consequences of a road crash on others	74	65	77	72	75	73	76	64	76
I am now more likely to think those who drink and drive are putting themselves and others in danger	81	76	82	80	81	80	82	60	83
I am now more likely to think It is unacceptable to drink and drive in any circumstance	78	68	81	78	78	77	79	52	81
After seeing this advert I will take more care when driving on the road	70	60	73	67	71	68	73	53	72
After seeing this advert, I am less likely to take a chance by having one or two drinks before driving	73	67	75	71	74	73	74	46	76
After seeing this advert, I will not drink any amount of alcohol before driving	73	69	74	71	73	74	71	27	78
After seeing this advert, I will encourage friends and family not to drink any alcohol before driving	71	70	72	71	71	72	70	33	75

The campaign evaluation is consistently positive across the demographic criteria. The pattern remains however of the evaluation being much weaker among drink drivers (past 12 months).