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Background and Objectives

The goal of this research is to deepen NHTSA's understanding of drivers and motorcycle riders who are at risk for impaired driving and riding by segmenting the market based on attitudes and behaviors.

Research Objectives

- **Segment** the market based on drinking and impaired driving attitudes and behaviors.

- **Estimate** the size and riskiness of each segment.

- **Provide** insight into hypotheses related to possible segments and messaging.

- **Identify** the most effective messaging and defining features of segments to inform creative development and ad buying.

Methodology

MODE — Online survey using NORC's AmeriSpeak probability panel and supplemented with phone and convenience panels.

LENGTH — 18 minutes

DATES — April 22–May 17, 2024

GEOGRAPHY — U.S. National

AUDIENCE

n=4,376 completes

Qualification criteria:
- 21 to 54 years old
- Licensed drivers (mix of vehicle/motorcycle)
- Drives at least 10 miles per week, unless motorcycle rider
- Consumes alcohol at least two to three times a month
- Meets at least one of the following criteria:
  - Binge drinker (has more than 1.5 drinks per hour)
  - Did not plan for sober ride before heaviest drinking session in the last month
  - Drove vehicle, rode motorcycle or rode with a driver who had also been drinking after heaviest drinking session in the last month
  - Attitudes align with at least three out of seven risk statements
  - Stopped by law enforcement for reckless driving or driving while impaired
  - Has been involved in a crash in the last 12 months

Methodology: Reporting Notes

- **Rounding**
  - Rounded percentages are shown throughout and, therefore, do not always add to 100%.
- **Demographic Skews**
  - The statement that a segment "skews" toward a certain demographic does <u>not</u> mean that demographic makes up the largest portion of that segment. Rather, it should be understood to mean that demographic makes up a larger share of the given segment than it does in the total sample (e.g., a segment skews female if it is 46% female since women make up only 41% of the total sample).
- **Ethnicity clarification**
  - Black, white and Asian refer to non-Hispanic Black/white/Asians.
- **Weighting**
  - With the question bases, percentages shown in charts and tables reflect data subject to statistical weighting.

Methodology: Representation

- This research used NORC's AmeriSpeak probability-based panel as the core of its sample and supplemented with convenience panel. Data from the convenience panel were weighted to match NORC's panel.

- The study screened to find adults 21 to 54 years old who are licensed drivers (vehicle and/or motorcycle), consume alcohol regularly (at least twice a month), and display attitudes or behaviors that would classify them as being at risk for impaired driving (including binge drinking, not planning for a sober ride, using impaired transport, displaying risky drinking attitudes, being stopped by law enforcement for impaired or reckless driving, and being involved in a crash).

- The findings are representative of that audience and caution should be exercised when generalizing to the broader population.

Key Principles

Segmentation is a means to divide the market into different **meaningful groups** that share similarities within the group, but show differentiating characteristics when compared to other groups.
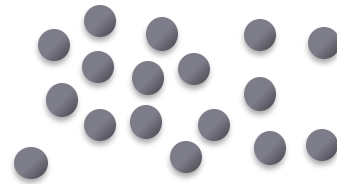
1	**2**	**3**
Examine all respondents' input on specific variables of interest, such as attitudes, behaviors and needs.	Identify meaningful patterns of similarities and differences between subgroups on the variables of interest.	Leverage the major differences in the data to divide respondents into homogeneous subgroups or "segments."
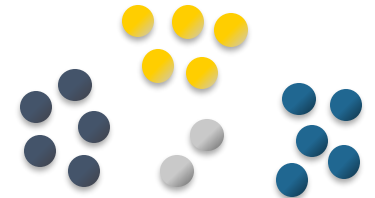
Segmentation Applications

Segmentation is all about getting the right **message** in front of the right **people**. In practice, segmenting the market allows for:

- More effective and resource-efficient ad buys
- Targeting segments who are more receptive to advertising
- Tailoring messages to specific segments based on what content resonates most with them

Additionally, the segmentation's typing tool allows for **classification** of individuals outside the initial dataset. This enables researchers to recruit members of specific segments for future qualitative or quantitative studies.

Segmentation Overview and Market Size

Segments Overview

Risky Drinkers (25%)
Heavy drinkers for whom impaired driving is just one part of a risk-tolerant lifestyle. Skewing younger (21 to 39 years old), they are motivated by legal consequences and the impact of impaired driving on their own lives. They are resistant to messaging, but resonate more with enforcement messaging than the other high-risk segment.

High Risk

Impaired Socializers (20%)
Higher-income segment that drinks socially. They think they are safe to drive after drinking (and are more likely to do so) because they drink more moderately. They are concerned with how their behavior impacts others and motivated by norming consequences.
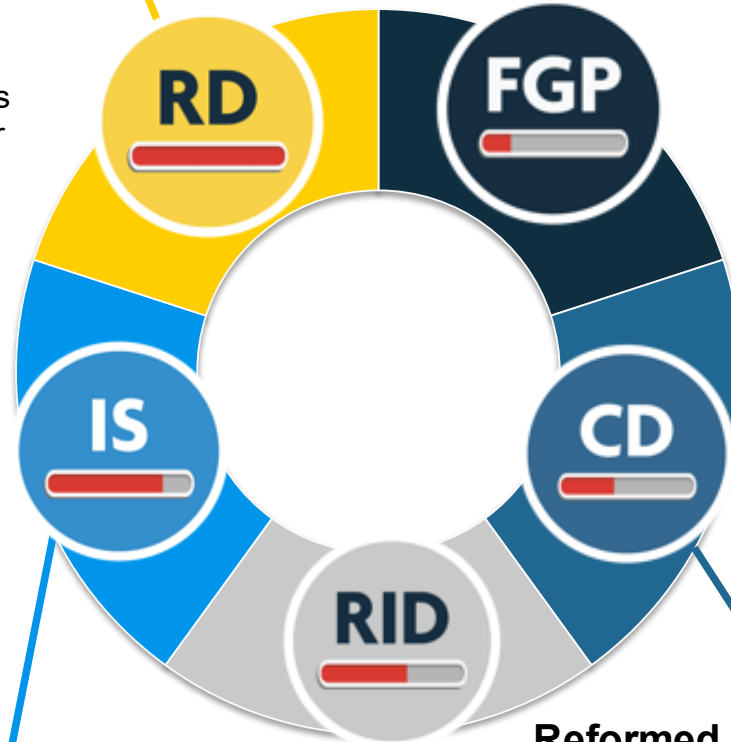
Friend Group "Parents" (26%)
More risk-averse and focuses on others. This segment skews 21 to 29 years old and female. They drink less and typically drink at home. They feel responsible for others and sometimes "parent" their friends. They over-index on all ad elements and especially norming-based messaging.

Lower Risk

Cautious Drinkers (19%)
Consume alcohol less frequently and less copiously than higher-risk segments and are much less likely to get home by impaired transport. They are motivated by impacts on their own life and by legal consequences; as such, they resonate more with enforcement elements than most other segments. They skew Hispanic and under 40 years old.

Reformed Impaired Drivers (11%)
Marathon drinkers who have been stopped, charged or convicted of a DUI in their lifetime and now tend to play it safe. Despite their enforcement history, they are more focused on the impact on others and respond most strongly to norming-based messaging. They skew older and male.

Medium Risk

RD | FGP | IS | CD | RID

Who Are the Impaired Drivers?

Though together comprising less than half of the high-risk market, Risky Drinkers and Impaired Socializers account for more than 90% of those most likely to drive within two hours of drinking.
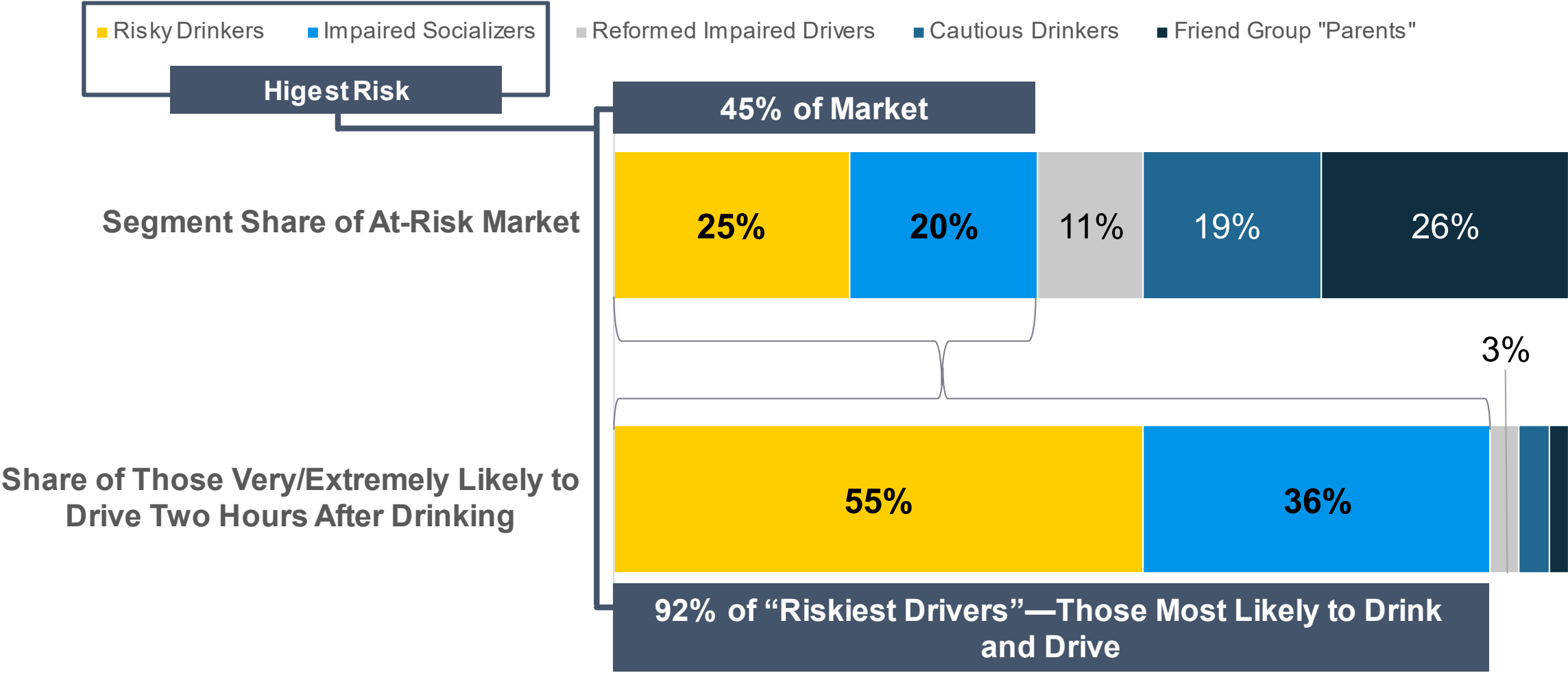
Legend: ■ Risky Drinkers ■ Impaired Socializers ■ Reformed Impaired Drivers ■ Cautious Drinkers ■ Friend Group "Parents"

Higest Risk

45% of Market

Segment Share of At-Risk Market

Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
25%	20%	11%	19%	26%

Share of Those Very/Extremely Likely to Drive Two Hours After Drinking

| 55% | 36% | | | 3% |

92% of "Riskiest Drivers"—Those Most Likely to Drink and Drive

The market can be broken up into five main segments and three main groups.

At Risk for Impaired Driving
20% Incidence

High Risk		Medium Risk	Lower Risk	
45% of market **92% of riskiest drivers***		11% of market 3% of riskiest drivers	45% of market 5% of riskiest drivers	
Risky Drinkers	**Impaired Socializers**	**Reformed Impaired Drivers**	**Cautious Drinkers**	**Friend Group "Parents"**
25% of market 55% of riskiest drivers	20% of market 36% of riskiest drivers	11% of market 3% of riskiest drivers	19% of market 3% of riskiest drivers	26% of market 2% of riskiest drivers
• Skews younger and male • Skews African American • Heavy, frequent drinkers • Most or second-most likely to drive impaired—varies by criteria • Focused on self • Motivated by legal consequences • Resistant to messaging, though proportionally less so to enforcement elements	• Skews 30 to 49 years old, female and white • Moderate, less frequent drinkers • Most or second-most likely to drive impaired—varies by criteria • Focused on others • Motivated by norming consequences • Resistant to messaging, though proportionally less to norming elements	• Skews older and male • Skews white • Frequent, marathon drinkers • Less likely to drive impaired following history of DUI pullover, arrest or conviction • Focused on others and motivated by norming consequences • Resonates with norming ad elements	• Skews younger and Hispanic • Moderate, occasional drinkers • Less likely to drive impaired • Focused on self and motivated by legal consequences • Receptive to messaging with a skew toward enforcement elements compared to others	• Skews younger and female • Moderate, occasional drinkers • Least likely to drive impaired • Risk-averse, focused on others and motivated by norming consequences • Receptive to all messaging, especially norming elements

Based on incidence, the market is estimated to comprise around 30 million at-risk drivers.

Segments are well balanced, ranging between approximately 3 million and 7.5 million drivers each.

	29.5M Estimated Market*				
	High Risk		Medium Risk	Lower Risk	
	Risky Drinkers	**Impaired Socializers**	**Reformed Impaired Drivers**	**Cautious Drinkers**	**Friend Group "Parents"**
Segment size	25%	20%	11%	19%	26%
Estimate # In Millions	7.4M	5.9M	3.2M	5.6M	7.7M
	45% of market **92% of riskiest drivers**		**55% of market** **8% of riskiest drivers**		

*All figures rounded to the closest 0.1M

Drinking and Driving Attitudes and Behaviors

Segments differ by drinking frequency and attitudes.

Drinking Behaviors
Frequency, Limits, Risk Qualifiers

	Drinking Frequency *Three or More Times Per Week*	*Does NOT Have a Hard Limit* *For Number of Alcoholic Beverages*	*Binge Drinking* *% Drinking 1.5 Drinks/Hour*
Risky Drinkers	56% ↑	30% — Sets limits, then exceeds them	52%
Impaired Socializers	41%	46% ↑	50%
Reformed Impaired Drivers	53%	46% ↑	46%
Cautious Drinkers	39%	27% — Sets hard limit, and sticks with them	63% ↑
Friend Group "Parents"	39%	34% — Sets hard limit, and sticks with them	62% ↑
	Total 45%	Total 35%	Total 56%

↑ Highest-scoring segment

Please see notes for bases and question texts.

Risky Drinkers show higher risk engagement.

Risk Engagement
Percentage of segment who exhibit three or more risky behaviors

To qualify for the survey, respondents needed to exhibit at least one risky behavior.

Risky Behaviors
- Binge drinker
- Did not plan for a sober ride in the last month
- Drove vehicle, rode motorcycle or rode with an impaired driver in the last month
- Attitudes align with at least three out of seven risk statements
- Ever stopped by law enforcement for reckless or drunk driving
- Involved in a crash in the last 12 months

35% Risky Drinkers

29% Reformed Impaired Drivers

15% Impaired Socializers

5% Cautious Drinkers

5% Friend Group "Parents"

17% Total

Highest-scoring segment
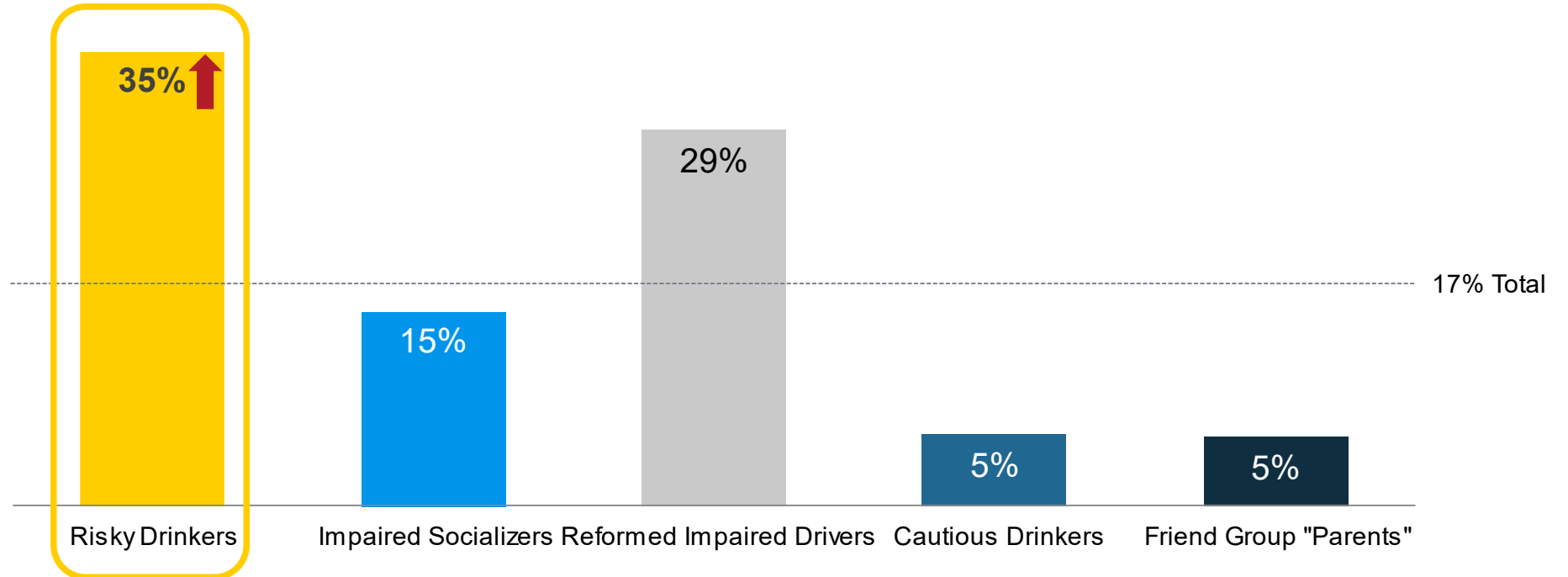
BASE: Qualified Respondents (n=4,357): Risky Drinkers (n=1,081); Impaired Socializers (n=858); Reformed Impaired Drivers (n=463); Cautious Drinkers (n=833); Friend Group "Parents" (n=1,122)
Q161/Q170/Q176/Q180/Q191/Q186: Risk engagement

For Risky Drinkers, impaired driving is part of a habit of risky driving. This is less true of Impaired Socializers.

Risky Driving—Secondary Behaviors
Likelihood, Perception of Impaired Driving Ability, Transport Decision

	Drive Within Two Hours of Drinking Likely (Top Three Box)	*Drive 10 mph Over the Speed Limit in Residential Area* Likely (Top Three Box)	*Drive After Using Marijuana* Likely (Top Three Box)	*Drive Without Wearing a Seat Belt* Likely (Top Three Box)
Risky Drinkers	72%	63% ↑	51% ↑	51% ↑
Impaired Socializers	75% ↑	51%	33%	23%
Reformed Impaired Drivers	31%	39%	23%	20%
Cautious Drinkers	18%	38%	21%	15%
Friend Group "Parents"	13%	32%	14%	17%
	Total 43%	Total 45%	Total 29%	Total 27%

Driving after drinking

Other risky driving behaviors

↑ Highest-scoring segment

Please see notes for bases and question texts.

Across metrics, Risky Drinkers and Impaired Socializers indicate a greater propensity for impaired driving.

Impaired Driving—Key Risk Metrics
Likelihood, Perception of Impaired Driving Ability, Transport Decision

	Drive Within Two Hours of Drinking Likely (Top Three Box)	**Okay to Drive Short Distance After a Few Drinks** Describes Well (Top Three Box)	**Getting Home After Drinking Out** Use Impaired Transport (NET)
Risky Drinkers	72%	77%	49%
Impaired Socializers	75% ↑	82% ↑	56% ↑
Reformed Impaired Drivers	31%	29%	17%
Cautious Drinkers	18%	27%	11%
Friend Group "Parents"	13%	10%	8%
	Total 43%	Total 46%	Total 29%

↑ Highest scoring segment

Reformed Impaired Drivers have all had law enforcement interactions related to drunk driving—three-quarters have been convicted.

Impaired Driving—Enforcement History
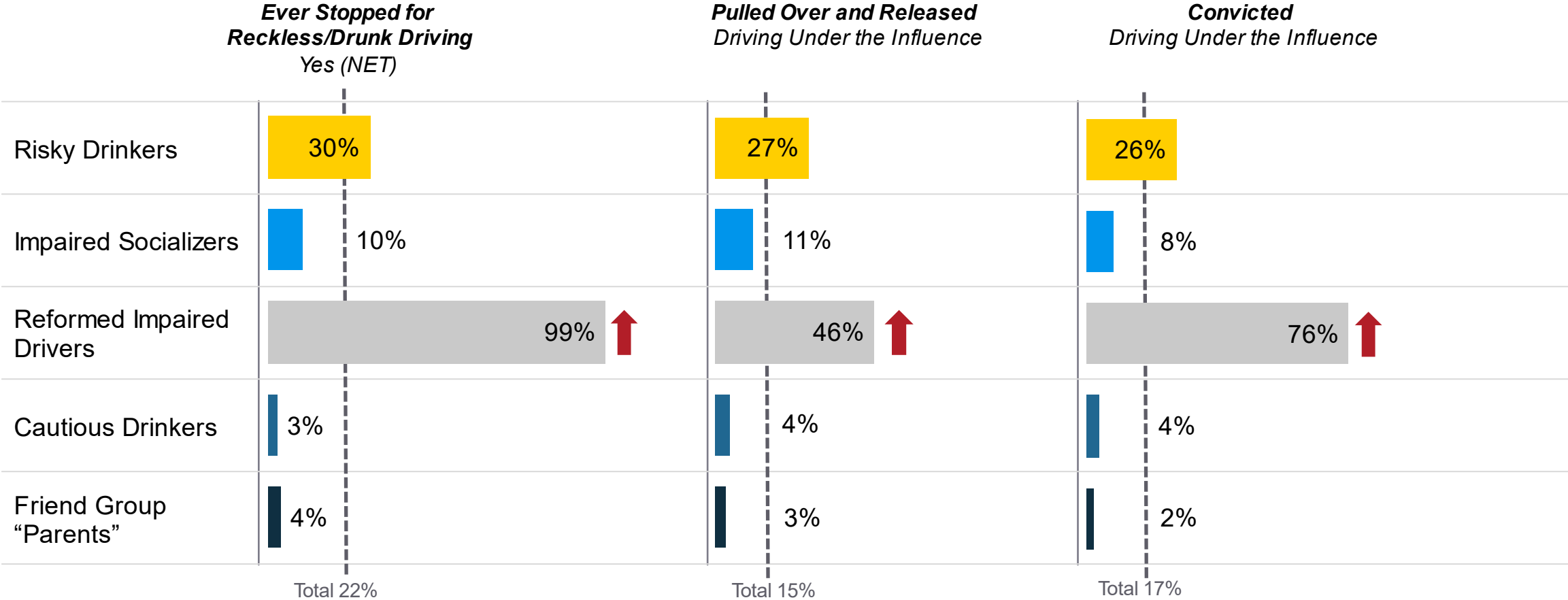
	Ever Stopped for Reckless/Drunk Driving Yes (NET)	*Pulled Over and Released* Driving Under the Influence	*Convicted* Driving Under the Influence
Risky Drinkers	30%	27%	26%
Impaired Socializers	10%	11%	8%
Reformed Impaired Drivers	99% ⬆	46% ⬆	76% ⬆
Cautious Drinkers	3%	4%	4%
Friend Group "Parents"	4%	3%	2%
	Total 22%	Total 15%	Total 17%

⬆ Highest-scoring segment
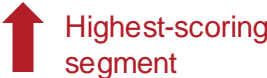
Cautious Drinkers are distinguished by more careful alcohol consumption and the ability to know their limits.

Consumption Control
Drinks Limit, Regrettable Decisions, Knowing When Had Too Much to Drink
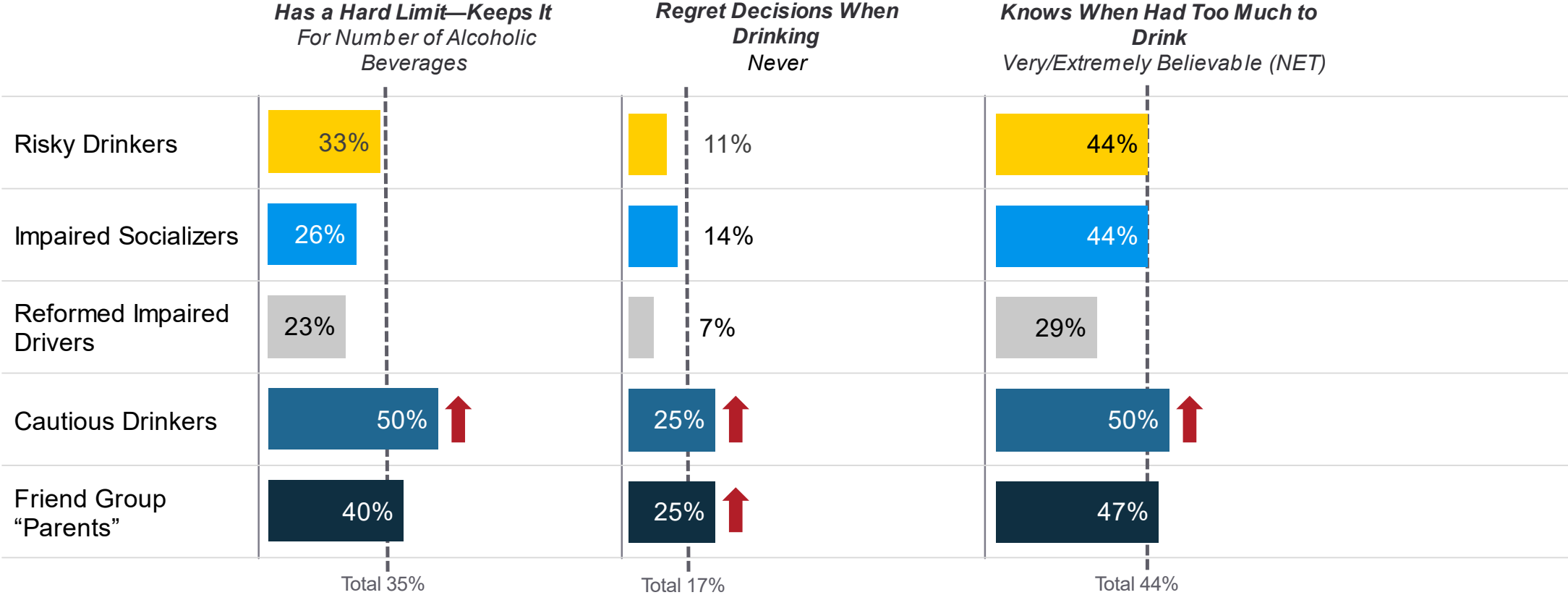
	Has a Hard Limit—Keeps It *For Number of Alcoholic Beverages*	**Regret Decisions When Drinking** *Never*	**Knows When Had Too Much to Drink** *Very/Extremely Believable (NET)*
Risky Drinkers	33%	11%	44%
Impaired Socializers	26%	14%	44%
Reformed Impaired Drivers	23%	7%	29%
Cautious Drinkers	50% ↑	25% ↑	50% ↑
Friend Group "Parents"	40%	25% ↑	47%
	Total 35%	Total 17%	Total 44%

↑ Highest-scoring segment
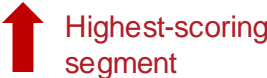
Friend Group "Parents" are marked by a sense of responsibility for others and a willingness to intervene to stop impaired driving.

Concern for Others

Consider in Decisions, Feel Responsible for Others, Intervene to Prevent Impaired Driving
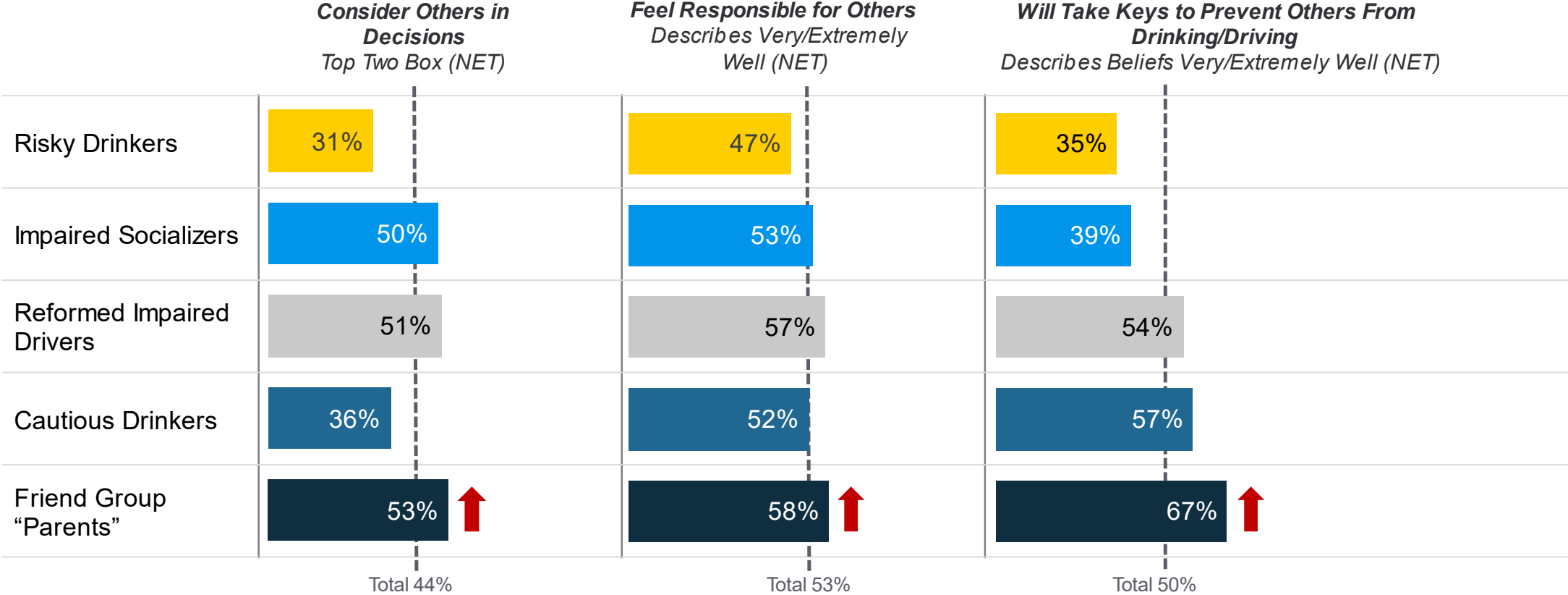
	Consider Others in Decisions Top Two Box (NET)	*Feel Responsible for Others* Describes Very/Extremely Well (NET)	*Will Take Keys to Prevent Others From Drinking/Driving* Describes Beliefs Very/Extremely Well (NET)
Risky Drinkers	31%	47%	35%
Impaired Socializers	50%	53%	39%
Reformed Impaired Drivers	51%	57%	54%
Cautious Drinkers	36%	52%	57%
Friend Group "Parents"	53% ⬆	58% ⬆	67% ⬆
	Total 44%	Total 53%	Total 50%

⬆ Highest-scoring segment
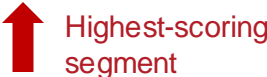
Consequences and Motivators

High-risk segments are more concerned with getting caught than breaking the law, but differ over disappointing themselves versus others.

Key Motivators
Don't Want to Get Caught Versus Break the Law X Don't Want to Disappoint Oneself Versus Others

Get Caught   Break the Law

	Get Caught	**Break the Law**	
Disappoint Others	**Don't Want to Disappoint Others + Get Caught** IS **Impaired Socializers**	**Don't Want to Disappoint Others + Break the Law** RID FGP Reformed Impaired Drivers Friend Group "Parents"	*Motivated by Norming Consequences*
Disappoint Myself	**Don't Want to Disappoint Myself + Get Caught** RD **Risky Drinkers**	**Don't Want to Disappoint Myself + Break the Law** CD Cautious Drinkers	*Motivated by Legal Consequences*

Question text in notes.

Physical harm to oneself or others is the most feared outcome.

Most Feared Outcomes
Top Three Selections

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Hurting/killing someone else	77%	44% ①	99% ①	90% ①	57% ②	99% ①
Hurting/killing myself	56%	32%	63% ②	69% ②	58% ①	69% ②
Getting arrested/going to jail	44%	35% ②	50% ③	43% ③	48% ③	46% ③
Impacting family life	23%	20%	20%	26%	23%	27%
Losing my license	22%	33% ③	15%	22%	26%	12%
Having a DUI on my record	20%	21%	17%	12%	31%	15%
Impacting my job/career	19%	29%	19%	22%	17%	12%
Court/lawyer costs	10%	19%	8%	7%	9%	4%
Damaging my vehicle	10%	17%	5%	4%	13%	6%
Getting fined	7%	20%	1%	2%	6%	1%
My name published for a DUI	6%	15%	1%	3%	7%	3%
Impacting my friendships	5%	14%	1%	1%	4%	4%

*Shading indicates over-index of 4%+

Please see notes for bases and question texts.

Physical harm to oneself or others is the most feared outcome.

Most Feared Outcomes
Top Three Selections

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Hurting/killing someone else	77%	44% ①				
Hurting/killing myself	56%	32%				
Getting arrested/going to jail	44%	35% ②				
Impacting family life	23%	20%				
Losing my license	22%	**33%** ③	15%	22%	**26%**	12%
Having a DUI on my record	20%	21%	17%	12%	**31%**	15%
Impacting my job/career	19%	**29%**	19%	22%	17%	12%
Court/lawyer costs	10%	**19%**	8%	7%	9%	4%
Damaging my vehicle	10%	**17%**	5%	4%	13%	6%
Getting fined	7%	**20%**	1%	2%	6%	1%
My name published for a DUI	6%	**15%**	1%	3%	7%	3%
Impacting my friendships	5%	**14%**	1%	1%	4%	4%

Risky Drinkers are numb to the leading consequences —they seem to have a mix of "it won't happen to me" or "I don't care."

*Shading indicates over-index of 4%+

Please see notes for bases and question texts.

Physical harm to oneself or others is the most feared outcome.

Most Feared Outcomes
Top Three Selections

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Hurting/killing someone else	77%	44% ①	99% ①	90% ①	57% ②	99% ①
Hurting/killing myself	56%	32%	63% ②	69% ②	58% ①	69% ②
Getting arrested/going to jail	44%	35% ②	50%	43% ③	48% ③	46% ③
Impacting family life	23%	20%				
Losing my license	22%	33% ③				
Having a DUI on my record	20%	21%				
Impacting my job/career	19%	29%	19%	22%	17%	12%
Court/lawyer costs	10%	19%	8%	7%	9%	4%
Damaging my vehicle	10%	17%	5%	4%	13%	6%
Getting fined	7%	20%	1%	2%	6%	1%
My name published for a DUI	6%	15%	1%	3%	7%	3%
Impacting my friendships	5%	14%	1%	1%	4%	4%

Getting arrested is a strong secondary consequence, especially for Impaired Socializers.

*Shading indicates over-index of 4%+

Please see notes for bases and question texts.

Physical harm to oneself or others is the most feared outcome.

Most Feared Outcomes
Top Three Selections

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Hurting/killing someone else	**77%**	44% ①	**99%** ①	90% ①	57% ②	**99%** ①
Hurting/killing myself	**56%**	32%	**63%** ②	69% ②	58% ①	**69%** ②
Getting arrested/going to jail	**44%**	35% ②	**50%** ③	43% ③	**48%** ③	46% ③
Impacting family life	**23%**	20%				7%
Losing my license	**22%**	**33%**				2%
Having a DUI on my record	**20%**	21%				5%
Impacting my job/career	**19%**	**29%**	19%	22%	17%	12%
Court/lawyer costs	**10%**	**19%**	8%	7%	9%	4%
Damaging my vehicle	**10%**	**17%**	5%	4%	13%	6%
Getting fined	**7%**	**20%**	1%	2%	6%	1%
My name published for a DUI	**6%**	**15%**	1%	3%	7%	3%
Impacting my friendships	**5%**	**14%**	1%	1%	4%	4%

> Even though they have been busted, Reformed Impaired Drivers still put more weight on norming consequences.

*Shading indicates over-index of 4%+

Please see notes for bases and question texts.

Emotional outcomes differ, with segments less concerned about physical harm less likely to cite guilt.

Emotional Outcome of Feared Consequence
Select One*

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Guilt	33%	15% ②	**49%** ①	**40%** ①	18% ②	**45%** ①
Regret	21%	18% ①	22% ②	18% ②	22% ①	22% ②
Shame	13%	13% ③	12% ③	**17%** ③	**16%** ③	11%
Sadness	11%	10%	9%	**14%**	8%	**14%** ③
Fear	7%	**10%**	3%	4%	**14%**	3%
Embarrassment	6%	**12%**	2%	2%	**9%**	1%
Anxiousness	3%	**7%**	1%	1%	4%	1%
Anger	3%	**7%**	*	*	3%	2%
Frustration	3%	**6%**	*	2%	4%	*

*Shading indicates over -index of 3%+

BASE: Qualified Respondents (n=4,357): Risky Drinkers (n=1,139); Impaired Socializers (n=820); Reformed Impaired Drivers (n=467); Cautious Drinkers (n=793); Friend Group "Parents" (n=1,138)

Q415: You indicated __ is the most concerning outcome. Which one of the following emotions best describes how you would feel if you experienced that outcome [depending on Q410 response: how you feel about that outcome]? If you would feel more that one emotion, please pick the one that is most impactful to you personally.

Segments' unique sets of attitudes and concerns suggest distinct (though at times overlapping) messaging strategies.

Consequences and Messaging

	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Feared Outcome	Enforcement Consequences	Physical Harm and Enforcement Consequences	Physical Harm and Enforcement Consequences	Enforcement Consequences and Physical Harm	Physical Harm
Resulting Emotions	Less motivated by guilt, more motivated by **embarrassment**, **anxiousness**, **fear**, anger and frustration	Primarily motivated by **guilt and regret**, with shame playing a role for some	More motivated by **guilt, sadness and shame**	Less motivated by guilt, more motivated by **regret and fear**	Primarily motivated by **guilt**, **regret** and **sadness**
Opportunity Narrative	Impaired driving leads to **costly legal consequences**, which will **decrease quality of life** and endanger career prospects.	**Don't make a mistake you can't take back.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.	**Don't make the same mistake twice.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.	**Better safe than sorry.** Impaired driving could land you in jail—**or worse**.	**Your friends are counting on you.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

Messaging and Advertising

While norming elements are preferred, the simple presence of law enforcement is considered one of (if not the most) effective enforcement element across segments.

Effective Ad Elements
Very/Extremely Effective

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
A fatality because of a crash	68%	50% ①	66% ①	81% ①	67% ①	80% ①
Impact on loved ones	64%	50% ②	62% ②	69% ②	67% ②	76% ②
A person getting in a crash	55%	36%	46%	62% ③	62% ③	71% ③
Presence of law enforcement	55%	46% ③	47% ③	61%	60%	62%
A person in jail	53%	45%	40%	61%	59%	61%
A person getting arrested	52%	45%	41%	58%	59%	59%
A pullover over by law enforcement	46%	40%	31%	49%	54%	58%
Facts about drinking and driving	42%	36%	24%	43%	49%	55%
A person getting tested for sobriety	41%	38%	26%	40%	51%	49%
"Drive sober or get pulled over" slogan	40%	35%	22%	41%	51%	49%
"Buzzed driving is drunk driving" slogan	39%	36%	22%	41%	46%	47%

*Shading indicates over-index of 10%+

Question text and base in notes.

Riskier segments are more resistant, rating ad elements far lower.

Effective Ad Elements
Average Top Box (Extremely Effective) of 11 Items

More responsive

More resistant

Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
14%	14%	28%	27%	33%

More Risky Segments

Less Risky Segments

Ad Elements:
- A fatality
- Impact on loved ones
- A crash
- Law enforcement
- Jail
- An arrest
- A pullover
- Facts/statistics
- "Drive sober or get pulled over"
- "Buzzed driving is drunk driving"
- Sobriety test

Please see notes for bases and question texts.

Though equally resistant in aggregate, high-risk segments show patterns of ad elements that they are *particularly* resistant to.

How likely would the following be to change your opinions and behavior regarding drinking and driving?
Very/Extremely Likely to Change Behavior (NET)

	Norming Elements	Enforcement Elements	Slogans
Risky Drinkers	46% — Most resistant	43%	36%
Impaired Socializers	58%	37% — Most resistant	22% — Most resistant
Reformed Impaired Drivers	71%	54%	41%
Cautious Drinkers	65%	57%	49% ↑
Friend Group "Parents"	76% ↑	58% ↑	48%
	Total 62%	Total 49%	Total 39%

↑ Highest-scoring segment

Please see notes for bases and question texts.
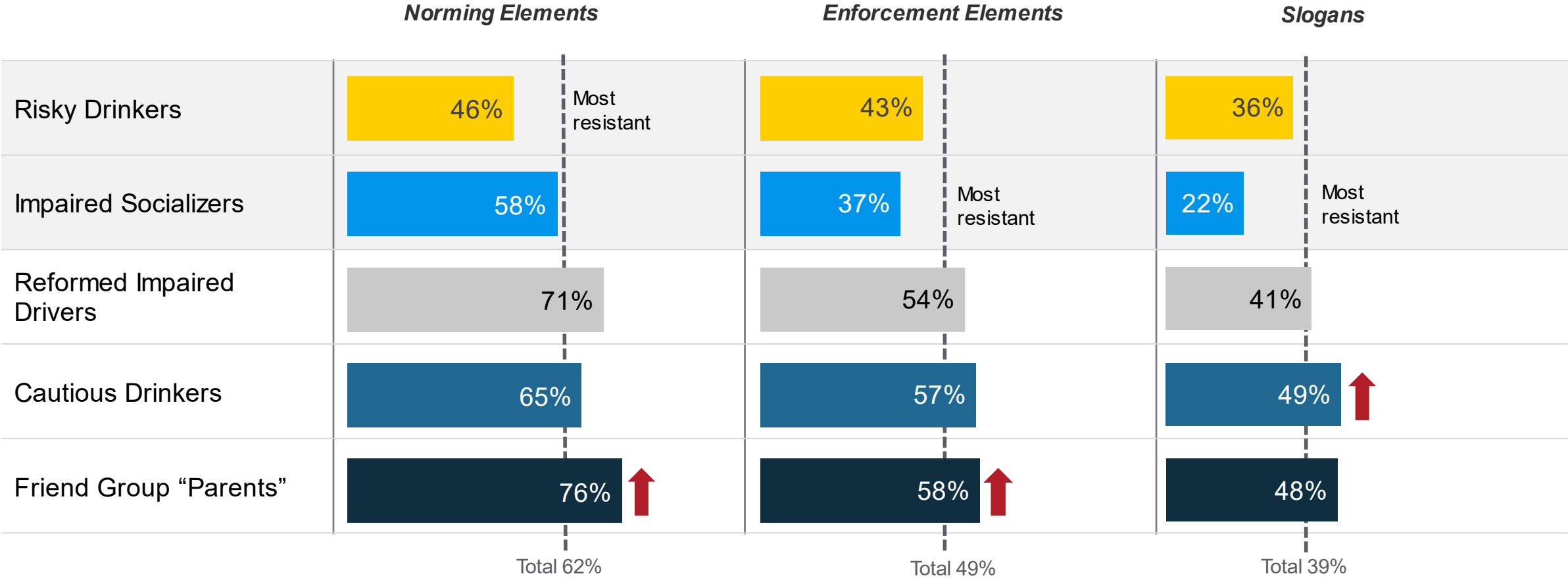
Though both high-risk segments are resistant to messaging, they are selectively *less* resistant to specific patterns of messages.

Risky Drinkers resonate more with a pullover, facts and statistics, field sobriety tests and slogans, while Impaired Socializers resonate more with crashes, fatalities and impact on loved ones.

Risky Drinkers	% Very / Extremely Effective	Impaired Socializers
50%	A fatality because of a crash	**66%**
50%	Impact on loved ones	**62%**
36%	A person getting in a crash	**46%**
46%	Presence of law enforcement	47%
45%	A person in jail	40%
45%	A person getting arrested	41%
40%	A pullover over by law enforcement	31%
36%	Facts about drinking and driving	24%
38%	A person getting tested for sobriety	26%
35%	"Drive sober or get pulled over" slogan	22%
36%	"Buzzed driving is drunk driving" slogan	22%

*Shading indicates statistically significant differences.

Risky Drinkers

Impaired Socializers
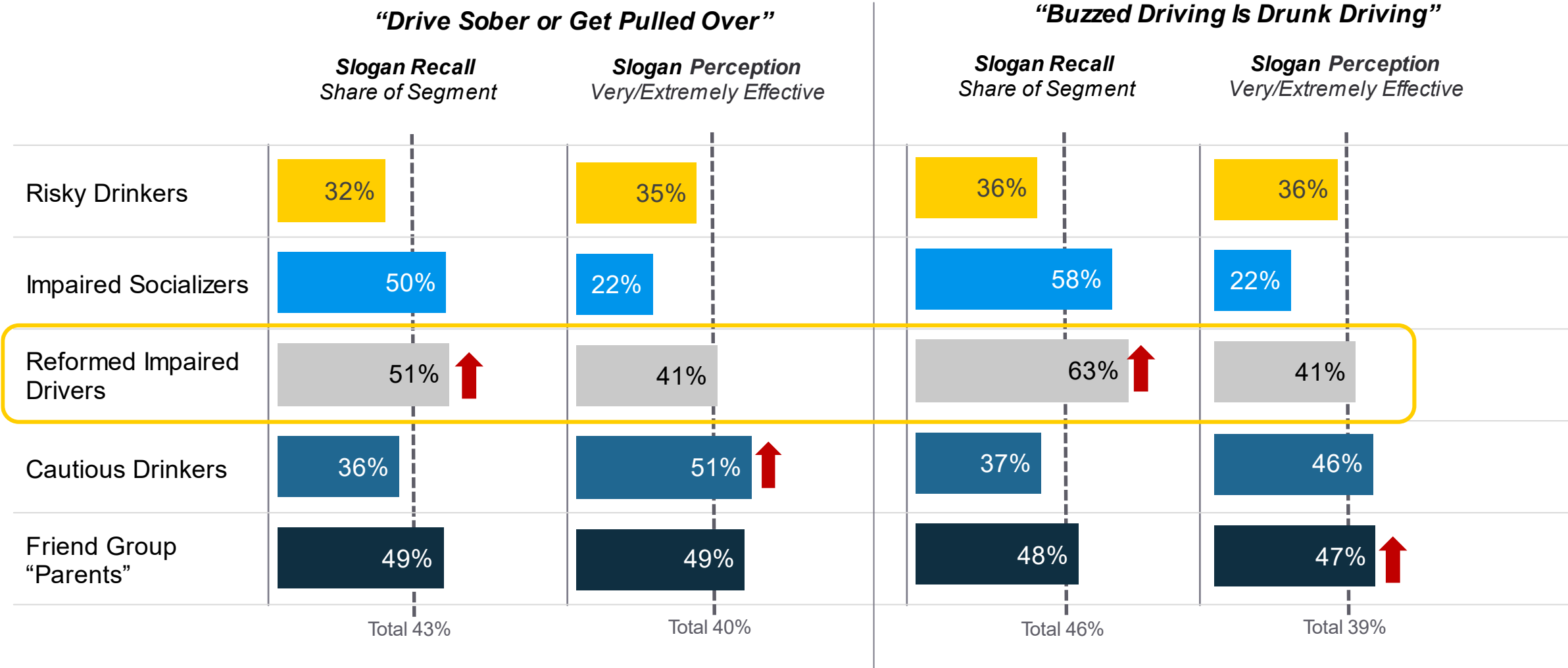
Question text and base in notes.

Using another lens, the riskiest segments again appear as more resistant to advertising.

How likely would the following be to change your opinions and behavior regarding drinking and driving?

Very/Extremely Likely to Change Behavior (NET)

	Advertising About Dangers of Drinking and Driving	Advertising About Presence of Law Enforcement	Loved One Being in a Crash
Risky Drinkers	25%	31%	46%
Impaired Socializers	15%	28%	65%
Reformed Impaired Drivers	29%	35%	70% ⬆
Cautious Drinkers	36%	39% ⬆	59%
Friend Group "Parents"	37% ⬆	39% ⬆	70% ⬆
	Total 29%	Total 34%	Total 61%

⬆ Highest-scoring segment

Please see notes for bases and question texts.
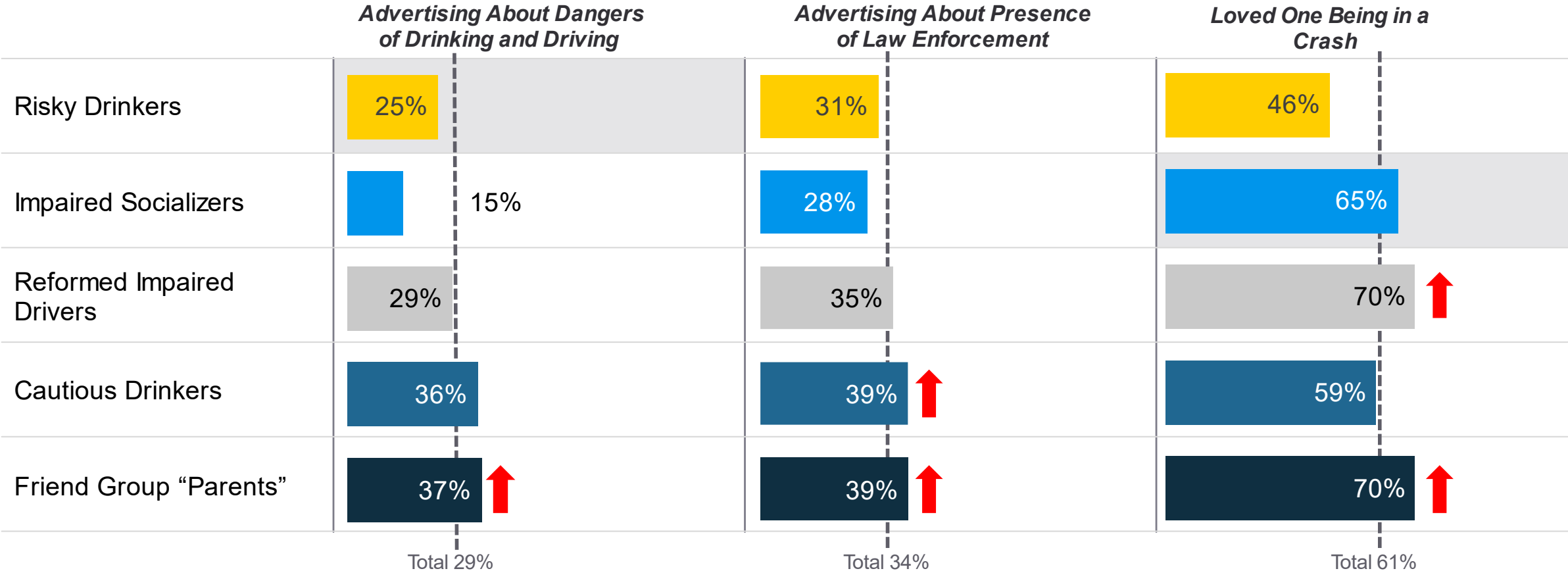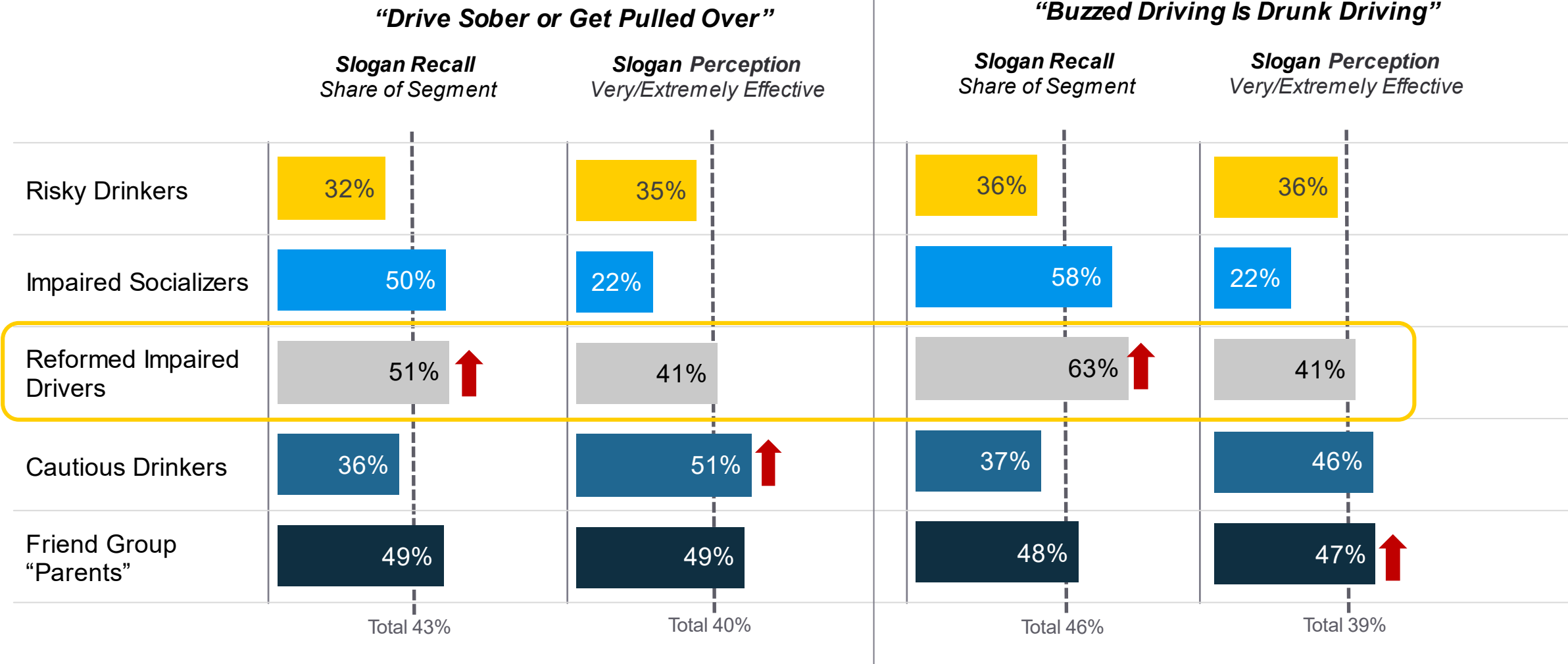
Reformed Impaired Drivers show the highest slogan recall, which may reflect their experience with law enforcement.

	"Drive Sober or Get Pulled Over"		"Buzzed Driving Is Drunk Driving"	
	Slogan Recall *Share of Segment*	**Slogan Perception** *Very/Extremely Effective*	**Slogan Recall** *Share of Segment*	**Slogan Perception** *Very/Extremely Effective*
Risky Drinkers	32%	35%	36%	36%
Impaired Socializers	50%	22%	58%	22%
Reformed Impaired Drivers	51% ↑	41%	63% ↑	41%
Cautious Drinkers	36%	51% ↑	37%	46%
Friend Group "Parents"	49%	49%	48%	47% ↑
	Total 43%	Total 40%	Total 46%	Total 39%

↑ Highest-scoring segment

Please see notes for bases and question texts.

Cautious Drinkers are an opportunity segment—they resonate with taglines but are among the least likely to be familiar.
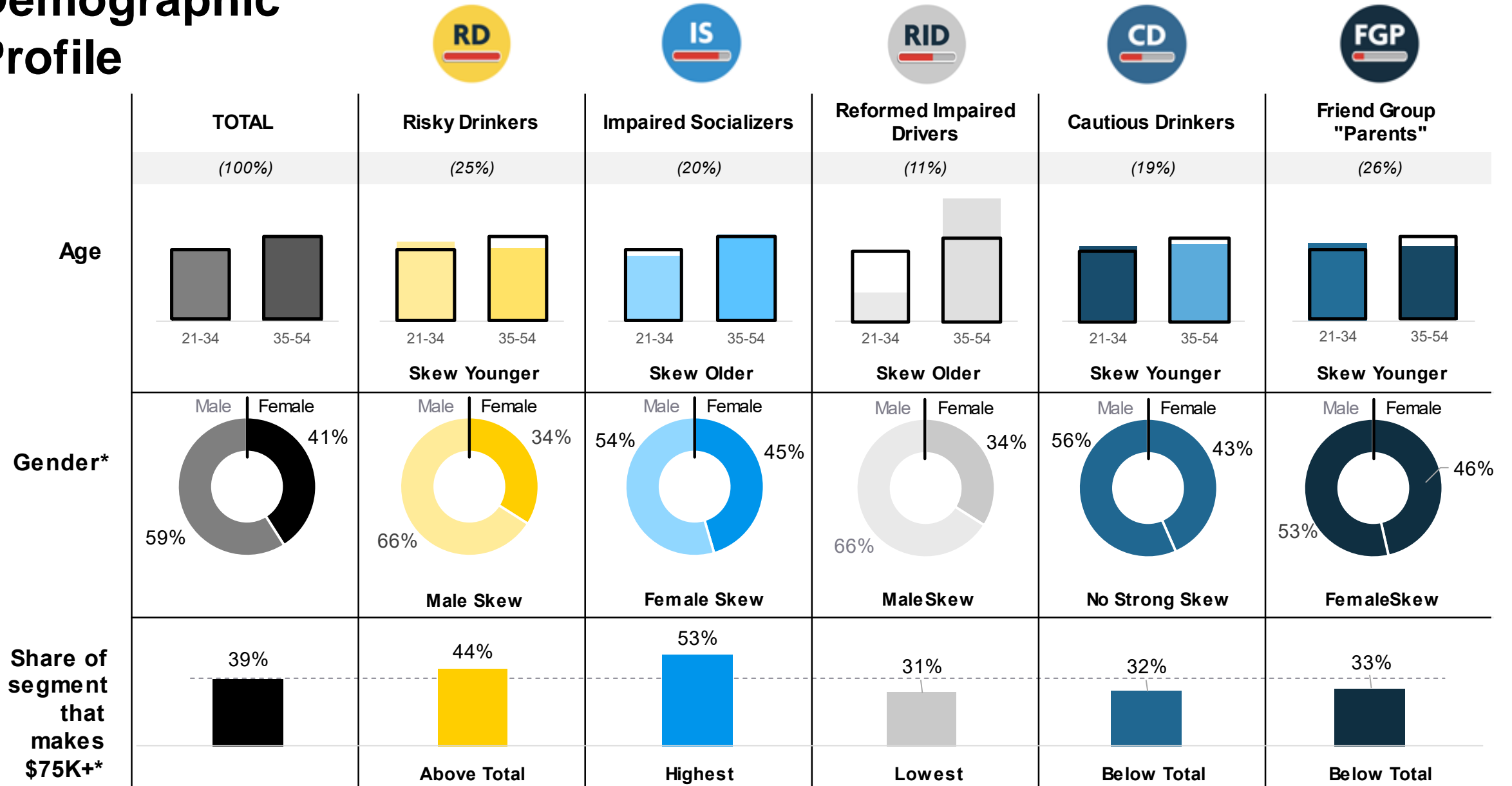
	"Drive Sober or Get Pulled Over"		"Buzzed Driving Is Drunk Driving"	
	Slogan Recall *Share of Segment*	**Slogan Perception** *Very/Extremely Effective*	**Slogan Recall** *Share of Segment*	**Slogan Perception** *Very/Extremely Effective*
Risky Drinkers	32%	35%	36%	36%
Impaired Socializers	50%	22%	58%	22%
Reformed Impaired Drivers	51% ⬆	41%	63% ⬆	41%
Cautious Drinkers	36%	51% ⬆	37%	46%
Friend Group "Parents"	49%	49%	48%	47% ⬆
	Total 43%	Total 40%	Total 46%	Total 39%

⬆ Highest scoring segment

Please see notes for bases and question texts.

Segment Demographics

Demographic Profile

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
	(100%)	(25%)	(20%)	(11%)	(19%)	(26%)

Age

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
21-34 / 35-54		Skew Younger	Skew Older	Skew Older	Skew Younger	Skew Younger

Gender*

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
Male / Female	59% / 41%	66% / 34%	54% / 45%	66% / 34%	56% / 43%	53% / 46%
		Male Skew	Female Skew	Male Skew	No Strong Skew	Female Skew

Share of segment that makes $75K+*

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
	39%	44%	53%	31%	32%	33%
		Above Total	Highest	Lowest	Below Total	Below Total

*Approximately 1% of each segment identified as transgender, nonbinary or another gender; additionally, respondents were allowed to make multiple selections regarding gender identity.
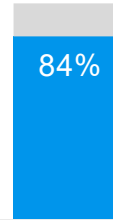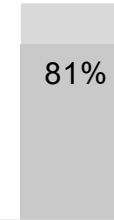
Demographic Profile
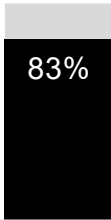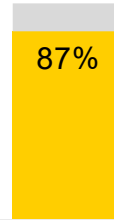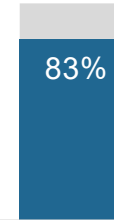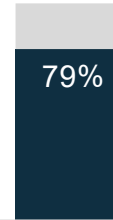
	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
	(100%)	(25%)	(20%)	(11%)	(19%)	(26%)
EMPLOYED	83%	87%	84%	81%	83%	79%
		Highest	Above Average	Below Average	Average	Lowest
KIDS AT HOME	52%	58%	48%	46%	50%	52%
		Highest	Average	Lowest	Below Average	Average
MULTI-ETHNICITY		Above Average	Lowest	Lowest	Highest	Below Average
	14% Black 23% Hispanic 4% Asian	22% Black 20% Hispanic 5% Asian	11% Black 20% Hispanic 4% Asian	10% Black 20% Hispanic 3% Asian	16% Black 27% Hispanic 6% Asian	11% Black 26% Hispanic 2% Asian
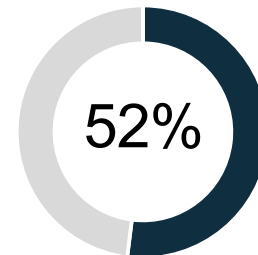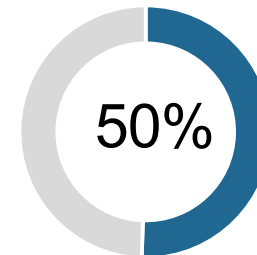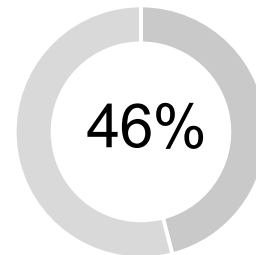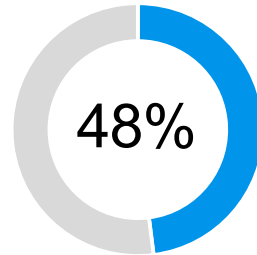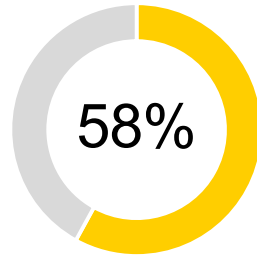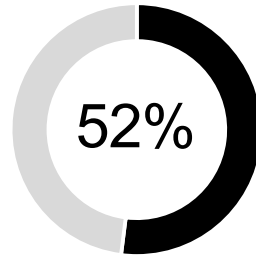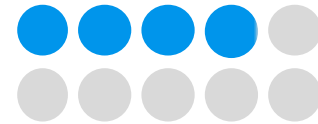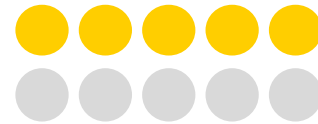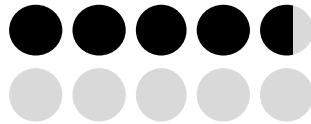
Segment Snapshots
Meet the Segments!

Note:
The next series of slides are summary snapshots for each segment. These include a mix of visuals and data. The visuals are meant to help conceptualize the data and are not 100% literal translations of the segments (for example, all segments include males and females, but segment snapshots will reflect the skews within each segment). The data is provided along with the visuals to help convey the true characteristics of each group.

Risky Drinkers

Consumption	**Highest** | 56% drink 3+ times per week
Risky Behaviors	**Highest** | 35% 3+ risk qualifiers
DUI History	**2nd highest** | 44% have DUI history
Likelihood to Drink and Drive	**2nd highest** | 72% at least somewhat likely to drive within 2 hours of drinking
Motivating Consequences	More concerned with **legal consequences** (60%)
Ad Receptivity	**MOST resistant (Tied)** 14% "Extremely Effective" Mean Score*
Age	**Skews younger (21 to 39 years old)** 33% 21-29, 36% 30-39, 30% 40-54
Gender	**Over-index male** 66% male | 34% female

Additional Takeaways
- Skew male, multicultural
- Most motorcycle and alternative licenses
- Least likely to recognize enforcement efforts
- Sets limits for number of drinks, then exceeds it
- Skew OK with drinking alone
- Most likely to make decisions they regret after drinking

RD

Heavy drinkers for whom impaired driving is just one part of a risk-tolerant lifestyle. Skewing younger (21 to 39 years old), they are motivated by legal consequences and the impact of impaired driving on their own lives. They are resistant to messaging but resonate more with enforcement messaging than the other high-risk segment.

RD

Risky Drinkers

YOUNGER MALE SKEW

Two-thirds are men; 70% are under 40-years-old

ALCOHOL CONSUMPTION

Over-index for consuming all kinds of alcohol; nearly half (45%, highest) consume liquor on a weekly basis

NO WORRIES

Most likely to say they are "carefree"; less concerned about what others think

RISK TAKERS

One-third (35%, highest) engage in 3 or more at-risk behaviors; most likely to enjoy taking risks

UNCONTROLLED

Most likely to set limits on consumption, then to keep drinking after reaching those limits

BAR FLIES

Two-fifths (39%) drink at a bar or club regularly, and 14% (highest) drink at the bar most often

IMPAIRED DRIVERS

Almost three-quarters (72%, second-highest) are at least somewhat likely to drive within two hours of drinking

THRILL SEEKERS

One-fourth (24%, highest) have a motorcycle license

Impaired Socializers

Consumption	**3rd highest** | 41% drink 3+ times per week
Risky Behaviors	**3rd highest** | 15% 3+ risk qualifiers
DUI History	**3rd highest** | 16% have DUI history
Likelihood to Drink and Drive	**Highest |** 75% at least somewhat likely to drive within 2 hours of drinking
Motivating Consequences	More concerned with **physical consequences** (67%)
Ad Receptivity	**MOST resistant (tied)** 14% "Extremely Effective" Mean Score*
Age	**Skews 30 to 49 years old** 24% 21-29, 35% 30-39, 41% 40-54
Gender	**Over-index female** 54% male | 45% female

Additional Takeaways
- Least multicultural (tied)
- High income, high education
- Skew suburban

IS

Higher-income segment that drinks socially. They think they are safe to drive after drinking (and are more likely to do so) because they drink more moderately. They are concerned with how their behavior impacts others and motivated by norming consequences.

IS
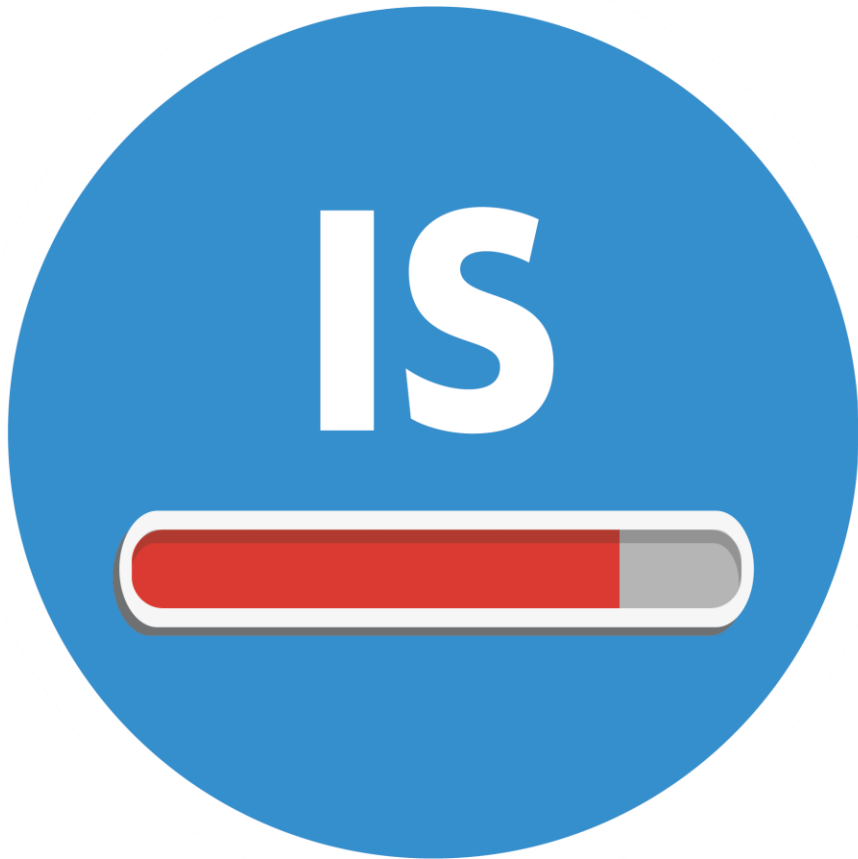
Impaired Socializers

FEMALE SKEW
45% (highest) in this segment are women. About two-thirds (65%) are 30 to 49 years old

HIGHER INCOME
More than one-third (37%) have a household income of $100K+

IMPAIRED DRIVERS
Three-fourths (75%, highest) are at least somewhat likely to drive within two hours of drinking

MODERATE CONSUMPTION
Tend to drink less (and less often) than average, but don't set limit on number of drinks

TABLE FOR TWO
Most prefer smaller groups (72%, tied highest)

FINE DINING
44% (highest) regularly drink at a brewery, winery or restaurant

Reformed Impaired Drivers

Consumption	**2nd highest** | 53% drink 3+ times per week
Risky Behaviors	**2nd highest** | 29% 3+ risk qualifiers
DUI History	**Highest** | 100% have DUI history
Likelihood to Drink and Drive	**3rd highest** | 31% at least somewhat likely to drive within 2 hours of drinking
Motivating Consequences	More concerned with **legal consequences** (68%)
Ad Receptivity	**More receptive** 28% "Extremely Effective" Mean Score*
Age	**Skews older (40 to 54 years old)** 8% 21-29, 28% 30-39, 64% 40-54
Gender	**Over-index male** 66% male | 34% female

Additional Takeaways
- Least multicultural (tied)
- Skew lower-middle income
- Least likely to have kids at home
- Most likely to recognize enforcement efforts
- Find DUI ads relatable (80%, highest)

RID

Marathon drinkers who have been stopped, charged or convicted of a DUI in their lifetime and now tend to play it safe. Despite their enforcement history, they are more focused on the impact on others and respond most strongly to norming-based messaging. They skew older and male.

RID

Reformed Impaired Drinkers

HOMEBODIES

72% (highest) drink most frequently at home

OLDER MALE SKEW

Two-thirds are men; 92% are 30-years-old or older

IF IT AIN'T BROKE

Most prefer the familiar and comfortable to the new and different (55%, highest)

OUTDOOR DRINKERS

One-third (34%, highest) drink outdoors regularly

SOCIALIZATION

Three-fifths (59%) enjoy drinking with family and friends

BEER DRINKERS

Two-thirds (65%, highest) drink beer at least weekly

Cautious Drinkers

Segment Size **19%**

Consumption	**Lowest (tied)** | 39% drink 3+ times per week
Risky Behaviors	**Lowest (tied)** | 5% 3+ risk qualifiers
DUI History	**2nd Lowest** | 7% have DUI history
Likelihood to Drink and Drive	**2nd lowest** | 18% at least somewhat likely to drive within 2 hours of drinking
Motivating Consequences	More concerned with **legal consequences** (54%)
Ad Receptivity	**More receptive** 27% "Extremely Effective" Mean Score*
Age	**Skews younger (Under 40 years old)** 32% 21-29, 38% 30-39, 31% 40-54
Gender	**No skew** 56% male | 43% female

Additional Takeaways
- Higher Hispanic group
- Consider themselves trendsetters
- Most optimistic
- Most likely to engage in holistic health practices
- Second-most likely to have a motorcycle license (15%)

CD

Consume alcohol less frequently and less copiously than higher-risk segments and are much less likely to get home by impaired transport. They are motivated by impacts on their own life and by legal consequences; as such, they resonate more with enforcement elements than most other segments. They skew Hispanic and under 40 years old.

CD

Cautious Drinkers

BEER DRINKERS
43% drink beer at least weekly; most likely to set a limit on drinks and stick to it

DESIGNATED DRINKERS
More likely to say they will only use a designated driver if absolutely necessary and that it's hard to have a good time as a designated driver

SOCIAL DRINKERS
Three in four say they prefer to drink with others; nearly half (47%) drink to spend time with friends and family

CULTURAL SKEW
27% are Hispanic

HAPPY-GO-LUCKY
62% are optimists (highest); skew more carefree

SAFE RIDER
Over-index for using rideshare and taxis to get home after drinking (49%); few say they usually use impaired transport after drinking out of the home (11%, second-lowest)

Friend Group "Parents"

Segment Size **26%**

Consumption	**Lowest (tied)** | 39% drink 3+ times per week
Risky Behaviors	**Lowest (tied)** | 5% 3+ risk qualifiers
DUI History	**Lowest** | 4% have DUI history
Likelihood to Drink and Drive	**Lowest** | 13% at least somewhat likely to drive within 2 hours of drinking
Motivating Consequences	More concerned with **physical consequences** (76%)
Ad Receptivity	**MOST receptive (tied)** 33% "Extremely Effective" Mean Score*
Age	**Skews 21 to 29 years old** 35% 21-29, 29% 30-39, 36% 40-54
Gender	**Over-index female** 53% male | 46% female

Additional Takeaways
• Skews lower income, 21 to 29 years old, female
• Less educated group
• Feels that it is better to be safe than sorry when it comes to driving after drinking
• More worried about how impaired driving affects others than themselves
• Most considerate of others when making decisions

FGP

More risk-averse and focuses on others. This segment skews 21 to 29 years old and female. They drink less and typically drink at home. They feel responsible for others and sometimes "parent" their friends. They over-index on all ad elements and especially norming-based messaging.

FGP

Friend Group "Parents"

OTHERS-ORIENTED

76% (highest) are most concerned with impacts on others' lives; they are also most likely to consider others when making decisions

YOUNGER FEMALE SKEW

46% are female; 35% are in their 20s 39% are in their 30s

HOMEBODIES

Seven in 10 most commonly drink at home; one in six prefer to drink at the home of a friend or family member

DRIVE LATER

Most likely to take away the keys to prevent a friend from drinking and driving

SOCIAL DRINKERS

Three-fourths prefer to drink with others; 64% drink to spend time with friends and family

Segment Risk and Opportunity

Segments vary by risk and opportunity narrative.
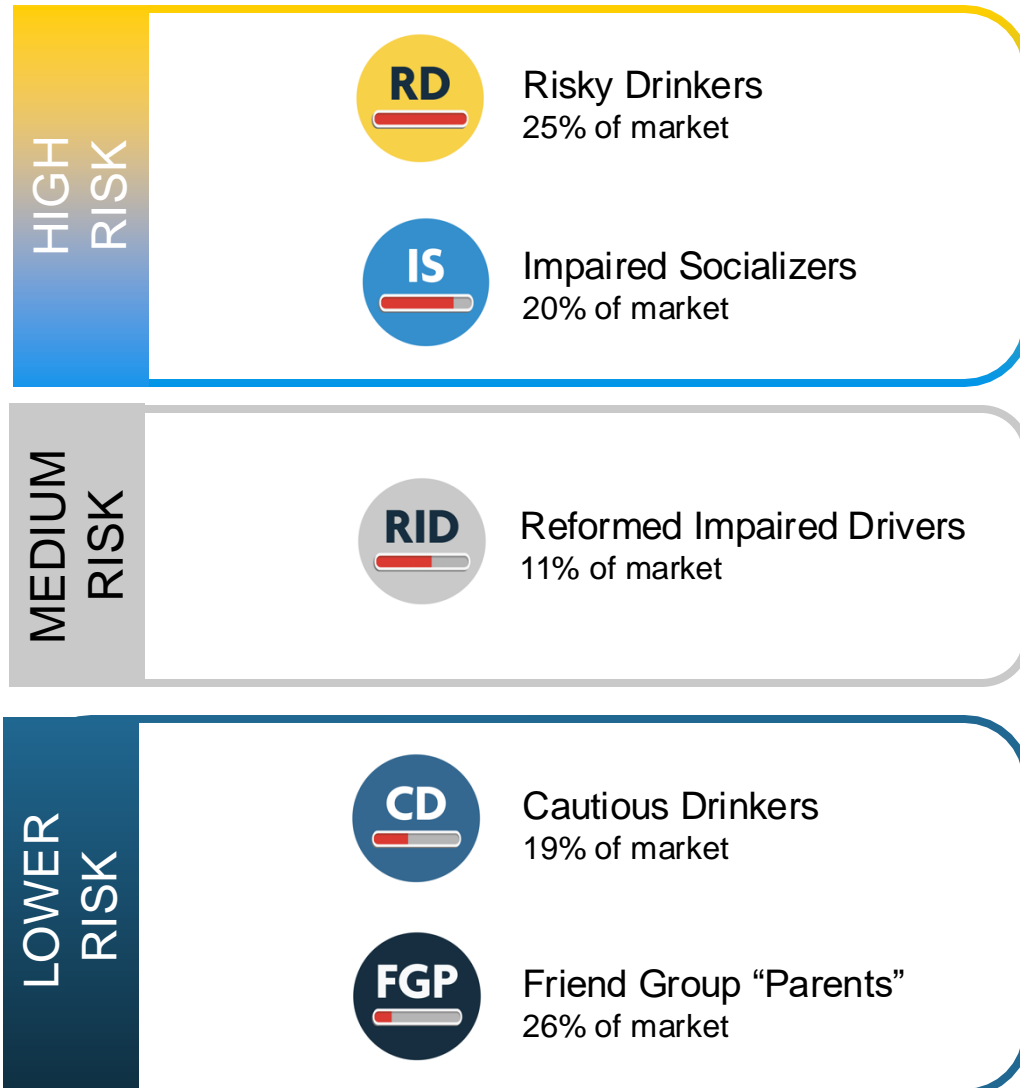
Opportunity Narratives

Risky Drinkers: Impaired driving leads to **costly legal consequences,** which will **decrease quality of life** and **endanger career prospects**.

Impaired Socializers: **Don't make a mistake you can't take back.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

Reformed Impaired Drivers: **Don't make the same mistake twice.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

Cautious Drinkers: **Better safe than sorry**. Impaired driving could land you in jail—**or worse**.

Friend Group "Parents": **Your friends are counting on you.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

Risky Drinkers

25% of market | 55% of riskiest drivers*

Opportunity Narrative: Impaired driving leads to **costly legal consequences,** which will **decrease quality of life** and **endanger career prospects**.

The CONSEQUENCES	The AD ELEMENTS	Ad Sightings
Motivated by **enforcement** and **social** consequences. • Motivated more by **impact on self** than on others • Heavily under-index for saying that a friend or family member being in a crash would change their opinions about drinking and driving • Concerned about **legal consequences** Less guilt-prone than other segments. • Motivated by a combination embarrassment, anxiousness, fear, anger and frustration	Resistant to all ad elements, but resonate with **enforcement messaging** more so than the other high-risk segment. • Overall, fatal crashes, impact on loved ones and presence of law enforcement are the **most effective ad elements** • However, they resonate more with field **sobriety tests** and **slogans** than the other high-risk segment	**Social media** **Television** **Radio**
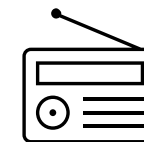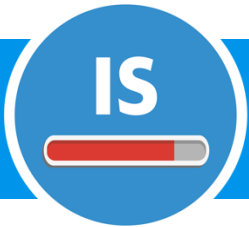
Impaired Socializers

20% of market | 36% of riskiest drivers*

> **Opportunity Narrative: Don't make a mistake you can't take back.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

The CONSEQUENCES	The AD ELEMENTS
Motivated primarily by **physical consequences**, though some enforcement consequences also resonate.	Resistant to all ad elements, but resonate with **norming messaging** more so than the other high-risk segment.

The CONSEQUENCES

Motivated primarily by **physical consequences**, though some enforcement consequences also resonate.

- Motivated more by **impact on others** than on self
- Most concerned about **disappointing others** of all segments.
- More concerned about **getting caught** than breaking the law

Guilt is the most common emotional outcome of impaired driving consequences.

The AD ELEMENTS

Resistant to all ad elements, but resonate with **norming messaging** more so than the other high-risk segment.

- Overall, fatal crashes, impact on loved ones and a person getting in a crash are the ad elements most rated **extremely effective**
- Presence of law enforcement is the most effective **enforcement element**
- However, they under-index more than any other segment for slogans, field sobriety tests and facts and statistics about drinking and driving

Ad Sightings
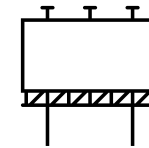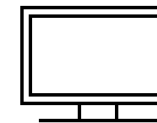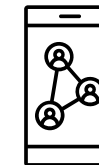
- Ads on billboards, buses or bus shelters
- Television
- Social media

Reformed Impaired Drivers

11% of market | 3% of riskiest drivers*

> **Opportunity Narrative: Don't make the same mistake twice.** Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

The CONSEQUENCES	The AD ELEMENTS
Despite their DUI history, they're most afraid of **hurting themselves and others** in a crash.	Receptive to a broad range of ad elements, with **norming messaging** being most effective.
• Least likely to say their most feared outcome is having a DUI on record—probably since this is already a **present reality** for most	• A fatal crash is by **far the most effective** element, with 81% saying it is very or extremely effective—more than any other segment
• Due to this experience, they most commonly say **legal consequences are more likely than physical ones**	• Presence of law enforcement and a person in jail are the most effective **enforcement** elements
• <u>However</u>, they are more **motivated by physical consequences**, perhaps due to their greater focus on others than on themselves	• <u>However</u>, sobriety tests and slogans are proportionally less effective than other elements
Guilt is the most common emotional outcome, but they over-index for sadness and shame.	

Ad Sightings
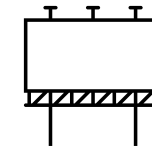
Ads on billboards, buses or bus shelters
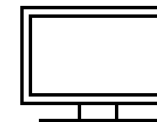
Television
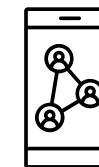
Social media

Cautious Drinkers

19% of market | 3% of riskiest drivers*

Opportunity Narrative: Better safe than sorry. Impaired driving could land you in jail—**or worse**.

The CONSEQUENCES	The AD ELEMENTS
Primarily motivated by **enforcement consequences**.	Receptive to a broad range of ad elements with **several distinct skews**.

The CONSEQUENCES

Primarily motivated by **enforcement consequences**.

- More concerned with **impact on self** than on others and with **legal consequences**, which two-thirds say are more likely than physical consequences
- However, in contrast to high-risk segments, they are much more concerned with breaking the law than with getting caught

Less likely to cite guilt as the emotional outcome of drinking and driving consequences.

- Over-index for regret, fear, shame and embarrassment

The AD ELEMENTS

Receptive to a broad range of ad elements with **several distinct skews**.

- While a fatal crash and impact on loved ones are overall most effective, they are **proportionally less effective** compared to other medium- to low-risk segments
- However, pullovers, facts and statistics, sobriety tests and slogans are **much more effective** compared to medium- to high-risk segments
- Like others, presence of law enforcement, a person in jail and an arrest are the overall most effective **enforcement** elements

Ad Sightings
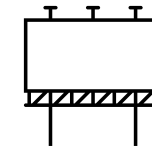
Ads on billboards, buses or bus shelters
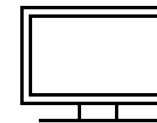
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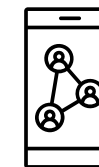
Social media

Friend Group "Parents"

26% of market | 2% of riskiest drivers*

Opportunity Narrative: Your friends are counting on you. Impaired driving could lead to a physical consequence that you—or someone else—might not walk away from.

The CONSEQUENCES

Primarily motivated by **norming consequences**.

- More concerned with **physical consequences** and the **impact on others** than any other segment

- <u>However</u>, like other segments, most think legal consequences are **more likely**, though to a lesser extent than other segments

- Almost all say they are more concerned about breaking the law than getting caught

They strongly skew **feeling guilty for doing the wrong thing**, and this is reflected in the emotional outcomes of drinking and driving, with most citing **guilt, regret or sadness**.

The AD ELEMENTS

Over-index on receptivity to all ad elements with particularly strong skew for **norming elements.**

- A fatal crash and impact on loved ones are the **most effective elements**

- **Law enforcement encounters also resonate**, with law enforcement presence, a person in jail, an arrest and a pullover all considered very or extremely effective by around three-fifths of the segment

Ad Sightings
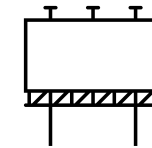
Ads on billboards, buses or bus shelters
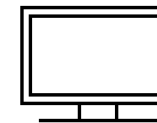
Television
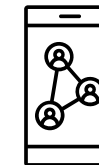
Social media

Appendix:

Hypotheses and Additional Detailed Slides

Hypotheses

H1	H2	H3	H4	H5
Unique segments will form around drinking habits—frequency of consumption, quantity of consumption, self-imposed limits, type of alcohol consumed, reasons for consumption and social preference.	Segments will differ by DUI history and propensity for risky driving behaviors.	Segments will show different levels of risk tolerance (and engagement with risky behaviors from screening).	Segments will have different concerns related to consequences (both in terms of perceived level of threat or concern as well as specific outcomes).	Motorcycle riders will not be a single segment; they will, however, be over-represented within at least one segment.

H6	H7	H8	H9	
Younger people (21 to 27 years old) will over-index in at least one segment and possibly account for most of that segment. They will show distinct attitudes and behaviors related to drinking.	Not all segments will be equally concerned about impaired driving, and some will be more receptive to messaging. Segments will differ both in their initial perceptions of risk and in the degree to which their perceptions of impaired driving's risk increase following the survey.	Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.	Segments will differ by peer attitudes toward drinking and driving. Some segments will indicate that their peer groups are more accepting of drinking and driving, whereas others will be strongly against it.	

H1 Unique segments will form around drinking habits—frequency of consumption, quantity of consumption, self-imposed limits, type of alcohol consumed, reasons for consumption and social preference.

✓ **The data supports this hypothesis.**

- **Segments show distinctions in their drinking behaviors and preferences.**
- **The riskiest segments consume more alcohol, more frequently.**
  - More than half of Risky Drinkers (56%) and Reformed Impaired Drivers (53%) drink three or more times per week.
  - Nearly half of Impaired Socializers (46%) and Reformed Impaired Drivers (46%) do not set limits on how much they drink.
- **Segments show unique preferences in where they consume alcohol and reasons why they drink.**
  - Some groups skew more likely to drink socially or to celebrate an occasion. Riskier groups show a slight skew to be more likely to drink to get drunk.

Unique segments will form around drinking habits—frequency of consumption, quantity of consumption, self-imposed limits, type of alcohol consumed, reasons for consumption and social preference.

	Drinking Frequency *Three or More Times Per Week*	**Top Drinking Location** *At My House*	**Self-imposed Limits** *No Set Limit*	**Maximum # Drinks** *Mean*
Risky Drinkers	56%	52%	30%	8.2
Impaired Socializers	41%	58%	46%	7.5
Reformed Impaired Drivers	53%	72%	46%	8.3
Cautious Drinkers	39%	65%	27%	7.3
Friend Group "Parents"	39%	71%	34%	7.3
	Total 45%	Total 63%	Total 35%	

Please see notes for bases and question texts.

H1 Unique segments will form around drinking habits—frequency of consumption, quantity of consumption, self-imposed limits, type of alcohol consumed, reasons for consumption and social preference.

	Drinking Reason *Social Setting*	*Drinking Reason* *To Celebrate an Event*	*Drinking Reason* *To Get Drunk*
Risky Drinkers	40%	39%	28%
Impaired Socializers	69%	58%	27%
Reformed Impaired Drivers	59%	53%	27%
Cautious Drinkers	47%	43%	21%
Friend Group "Parents"	64%	58%	23%
	Total 55%	Total 50%	Total 25%

Please see notes for bases and question texts.

H1

Unique segments will form around drinking habits—frequency of consumption, quantity of consumption, self-imposed limits, type of alcohol consumed, reasons for consumption and social preference.

	Blackout Drinking *Sometimes/Frequently (NET)*	**Regret Decisions When Drinking** *Sometimes/Frequently (NET)*	**Unable to Stop Drinking** *Sometimes/Frequently (NET)*
Risky Drinkers	34%	51%	40%
Impaired Socializers	17%	34%	23%
Reformed Impaired Drivers	21%	47%	26%
Cautious Drinkers	16%	27%	15%
Friend Group "Parents"	13%	25%	14%
	Total 21%	Total 36%	Total 23%

Please see notes for bases and question texts.

H1

Unique segments will form around drinking habits—frequency of consumption, quantity of consumption, self-imposed limits, type of alcohol consumed, reasons for consumption and social preference.

	Family Member Expressed Concern about Drinking Yes (NET)	*Injury Resulting From Drinking* Yes (NET)	*Drink More Heavily When by Oneself* Very/Extremely Likely (NET)
Risky Drinkers	44%	27%	34%
Impaired Socializers	26%	10%	17%
Reformed Impaired Drivers	46%	23%	24%
Cautious Drinkers	18%	8%	21%
Friend Group "Parents"	19%	6%	19%
	Total 29%	Total 14%	Total 23%

Please see notes for bases and question texts.

H2 Segments will differ by DUI history and propensity for risky driving behaviors.

✓ **The data supports this hypothesis.**

- **Segments' risk tolerance is a key contributor in their makeup, which is quantifiable through their risk engagement.**
  - Risky Drinkers and Impaired Socializers are much more likely to drive within two hours of drinking and use impaired transport after a drinking session.
- **About one in four (27%) have a DUI history, but this is concentrated in the riskiest groups.**
  - All respondents in the Reformed Impaired Driver group have a DUI history. Risky Drinkers (44%) over-index on having a DUI history.

H2 Segments will differ by DUI history and propensity for risky driving behaviors.
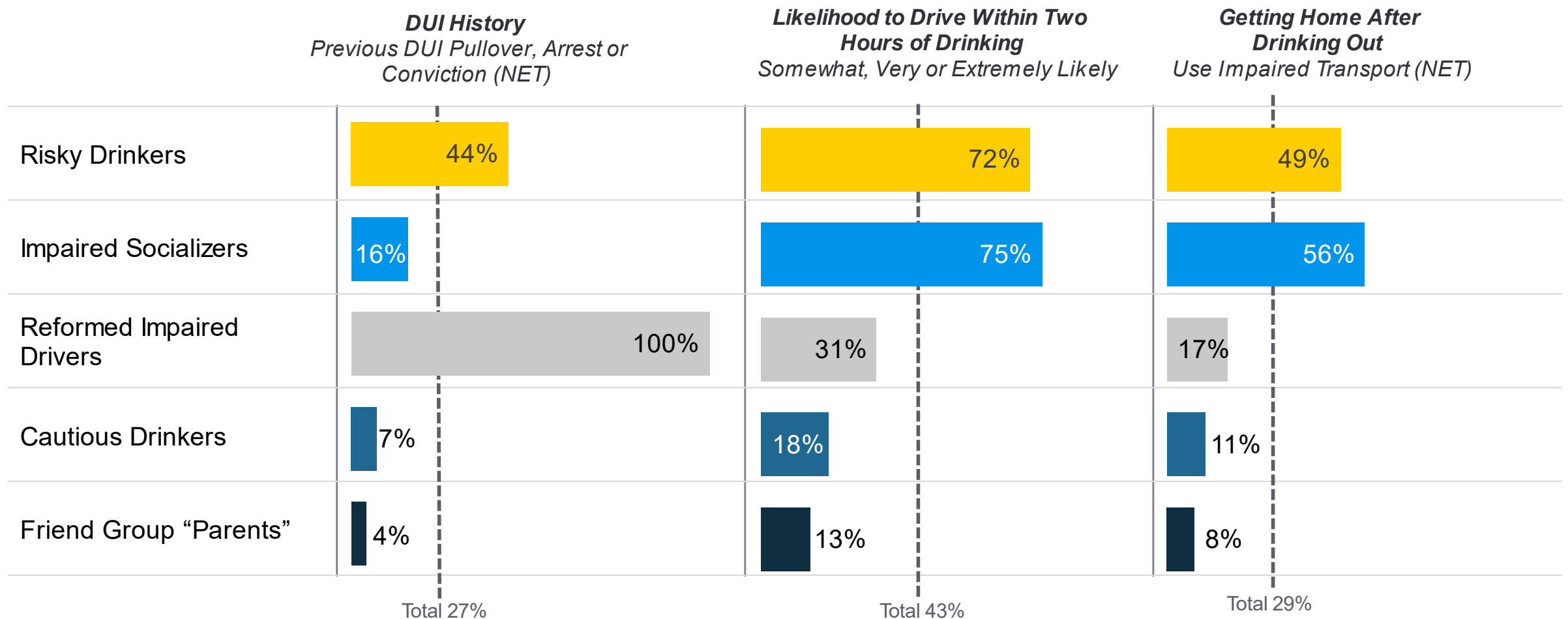
	DUI History Previous DUI Pullover, Arrest or Conviction (NET)	Likelihood to Drive Within Two Hours of Drinking Somewhat, Very or Extremely Likely	Getting Home After Drinking Out Use Impaired Transport (NET)
Risky Drinkers	44%	72%	49%
Impaired Socializers	16%	75%	56%
Reformed Impaired Drivers	100%	31%	17%
Cautious Drinkers	7%	18%	11%
Friend Group "Parents"	4%	13%	8%
	Total 27%	Total 43%	Total 29%

p 67

Please see notes for bases and question texts.

H2 Segments will differ by DUI history and propensity for risky driving behaviors.

	Coffee Sobers Me Up Enough to Drive *Top Three Box (NET)*	**If No One Gets Hurt, Driving After a Few Drinks is OK** *Somewhat, Very or Extremely Likely*
Risky Drinkers	53%	60%
Impaired Socializers	19%	38%
Reformed Impaired Drivers	11%	14%
Cautious Drinkers	24%	18%
Friend Group "Parents	12%	8%
	Total 26%	Total 29%

Please see notes for bases and question texts.
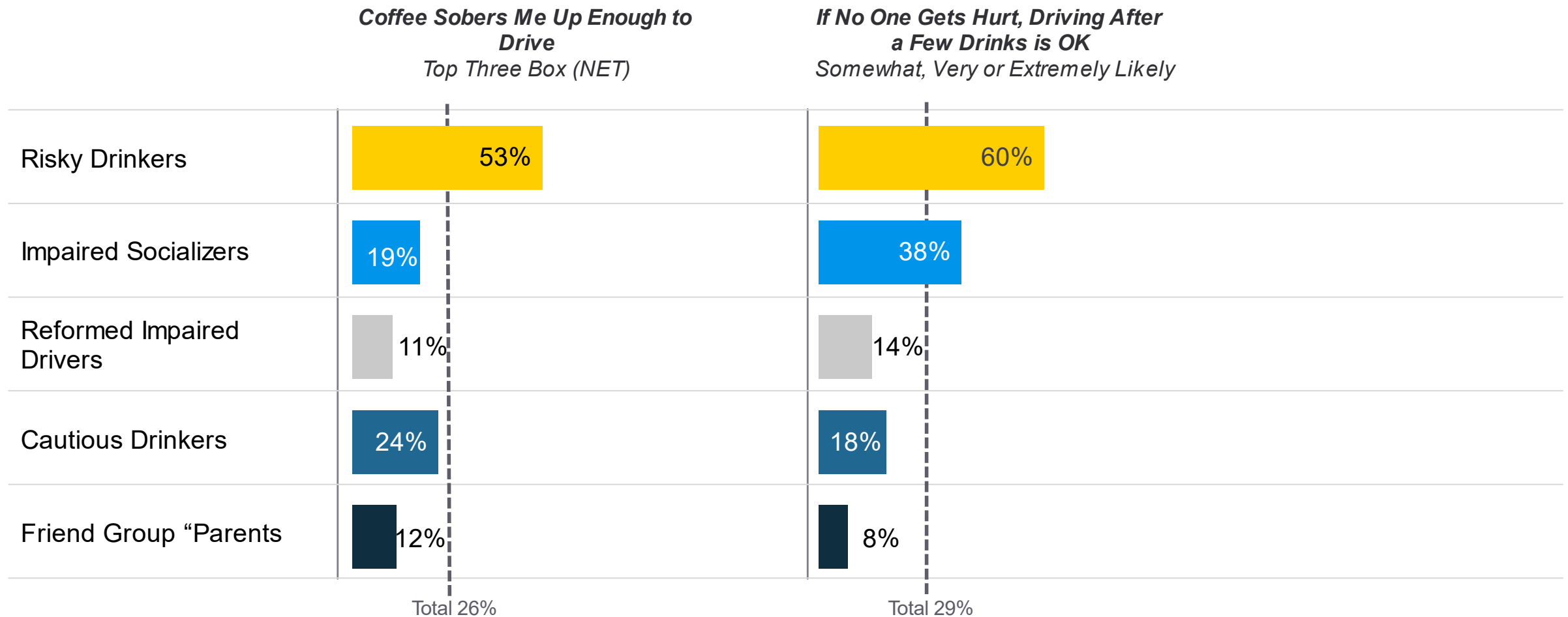
✓ **The data supports this hypothesis.**

- **The riskiest segments engage with more high-risk behaviors, whereas less risky segments tend to engage in fewer.**
  - Risky Drinkers (29%) and Reformed Impaired Drivers (35%) engage in three or more risky behaviors at the highest levels, both being considerably higher than the lowest-risk groups.
    - Impaired Socializers, though showing lower risk engagement than Reformed Impaired Drivers, are nonetheless considered a higher-risk segment because they are more likely to drive after drinking and use impaired transport.
  - Binge drinking (defined as a session of 1.5 drinks/hour) is the lowest barrier risk behavior segments are screened on, and this is how most of both low-risk groups qualify.

H3 Segments will show different levels of risk tolerance (and engagement with risky behaviors from screening).

Share of Segment With Three or More Risk Qualifiers

Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
35%	15%	29%	5%	5%

Please see notes for bases and question texts.

H3 Segments will show different levels of risk tolerance (and engagement with risky behaviors from screening).

	Binge Drinking % Drinking 1.5 Drinks/Hour	Enforcement History LE Pullover for Reckless/Drunk Driving	Crash Involvement Last 12 Months
Risky Drinkers	52%	31%	21%
Impaired Socializers	50%	11%	11%
Reformed Impaired Drivers	46%	100%	8%
Cautious Drinkers	63%	5%	7%
Friend Group "Parents"	62%	6%	9%
	Total 56%	Total 23%	Total 12%

Please see notes for bases and question texts.

H3 Segments will show different levels of risk tolerance (and engagement with risky behaviors from screening).

	Risk Attitudes *Three or More Risky Attitudes*	Planned Return Method *No Plan for Sober Ride*	Actual Return Method *Used Impaired Transport*
Risky Drinkers	75%	10%	27%
Impaired Socializers	59%	14%	28%
Reformed Impaired Drivers	41%	4%	5%
Cautious Drinkers	57%	3%	11%
Friend Group "Parents"	44%	5%	10%
	Total 57%	Total 8%	Total 17%

Please see notes for bases and question texts.

H4 Segments will have different concerns related to consequences (both in terms of perceived level of threat or concern as well as specific outcomes).

✓ **The data supports this hypothesis.**

- **Segments differ in what consequences they consider most concerning.**
    - Lower-risk groups over-index on being motivated by not wanting to do anything illegal.
    - Risky Drinkers and Cautious Drinkers over-index on being concerned about legal consequences.
        - They also fall well below the mean when it comes to being motivated by not wanting to hurt or kill someone in a crash.

H4

Segments will have different concerns related to consequences (both in terms of perceived level of threat or concern as well as specific outcomes).

	More Concerned About Legal Consequences *Somewhat/Much More Concerned (NET)*	More Concerned About Impact on My Life *Somewhat/Much More Concerned (NET)*	More Concerned about Doing Something Illegal *I Don't Want to Do Something Illegal*
Risky Drinkers	60%	59%	46%
Impaired Socializers	33%	32%	45%
Reformed Impaired Drivers	32%	30%	72%
Cautious Drinkers	54%	56%	84%
Friend Group "Parents"	23%	24%	94%
	Total 41%	Total 41%	Total 68%

Please see notes for bases and question texts.

H4 Segments will have different concerns related to consequences (both in terms of perceived level of threat or concern as well as specific outcomes).

	Losing My License Top Three Mention	*Spending Money on Court Costs or a Lawyer* Top Three Mention	*Getting Fined* Top Three Mention
Risky Drinkers	33%	19%	20%
Impaired Socializers	15%	8%	1%
Reformed Impaired Drivers	22%	7%	2%
Cautious Drinkers	26%	9%	6%
Friend Group "Parents"	12%	4%	1%
	Total 22%	Total 10%	Total 7%

Please see notes for bases and question texts.

Legal Consequences

Physical Consequences

Impact on Others

More Concerned with Impact on Others, Legal Consequences

More Concerned with Impact on Others, Physical Consequences

RID — Reformed Impaired Drivers

IS — **Impaired Socializers**

FGP — Friend Group "Parents"

More Concerned with Impact on Self, Legal Consequences

More Concerned with Impact on Self, Physical Consequences

RD — **Risky Drinkers**

CD — Cautious Drinkers

Impact on Self

All segments agree that legal consequences are more likely

Please see notes for bases and question texts.

Hurting Oneself or Others Share of Most Feared Outcomes

Guilt as Emotional Outcome

Guilt-Motivated,
Less Harm-Focused

Guilt-Motivated,
Harm-Focused

RID — Reformed Impaired Drivers

IS — Impaired Socializers

FGP — Friend Group "Parents"

Less Guilt-Motivated,
Less Harm-Focused

Less Guilt-Motivated,
Harm-Focused

RD — Risky Drinkers

CD — Cautious Drinkers

Please see notes for bases and question texts.
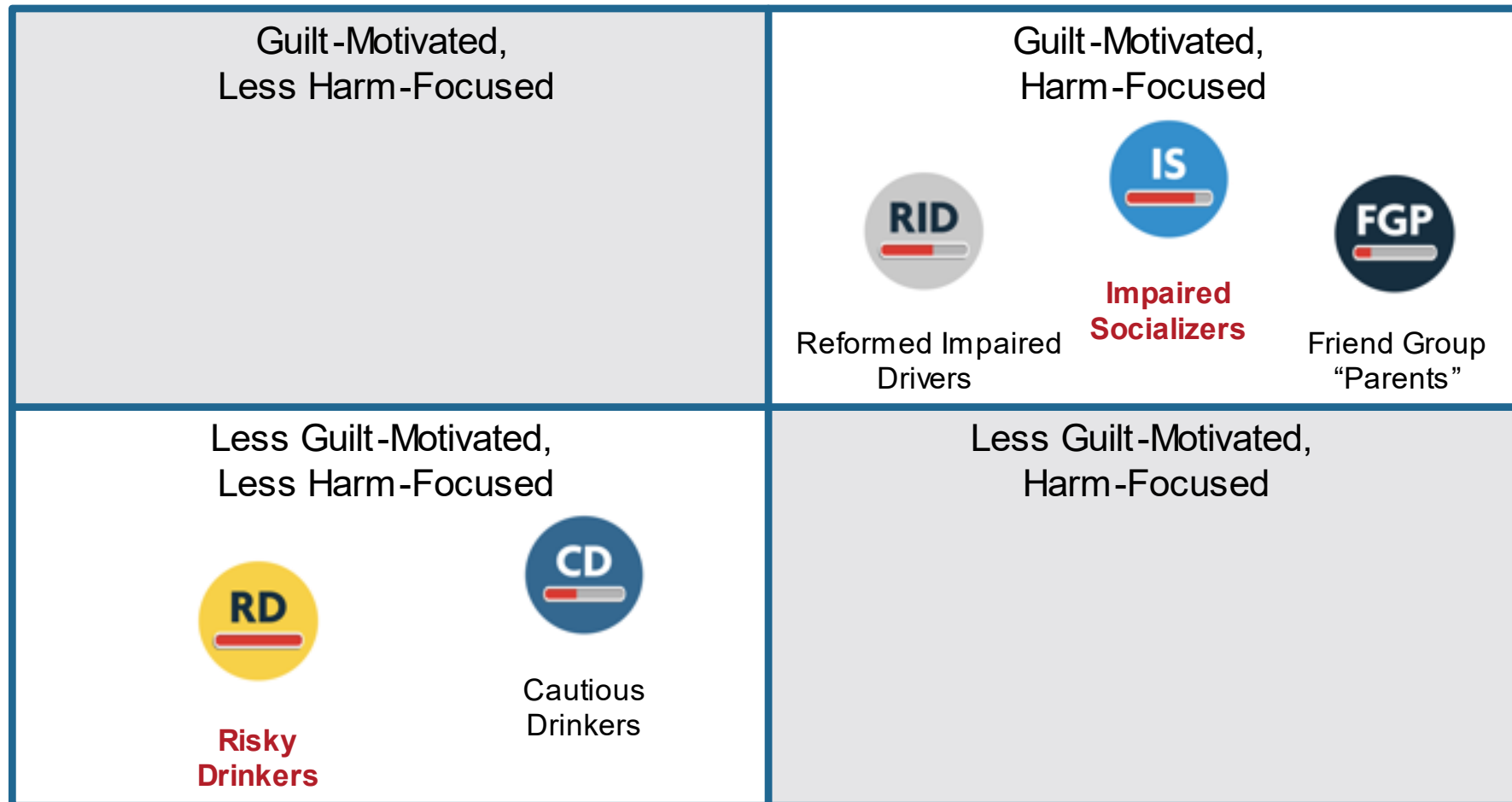
H5 Motorcycle riders will not be a single segment; they will, however, be over-represented within at least one segment.

✓ **The data supports this hypothesis.**

- **Motorcyclists are most highly concentrated in our riskiest group, but are represented in each of the other segments.**
  - Motorcyclists over-index in the Risky Drinkers segment (24%).
    - This accounts for 40% of all motorcycle riders in the high-risk population.
  - Other alternative licenses also over-index in the Risky Drinkers segment.

Motorcycle riders will not be a single segment; they will, however, be over-represented within at least one segment.

	Motorcycle License	*Boat License*	*Commercial Motor Vehicle License*	*Moped or Motor-driven Cycles*
Risky Drinkers	24%	11%	8%	8%
Impaired Socializers	8%	5%	4%	2%
Reformed Impaired Drivers	13%	7%	3%	3%
Cautious Drinkers	15%	6%	3%	4%
Friend Group "Parents"	12%	6%	5%	3%
	Total 15%	Total 7%	Total 5%	Total 4%

Please see notes for bases and question texts.
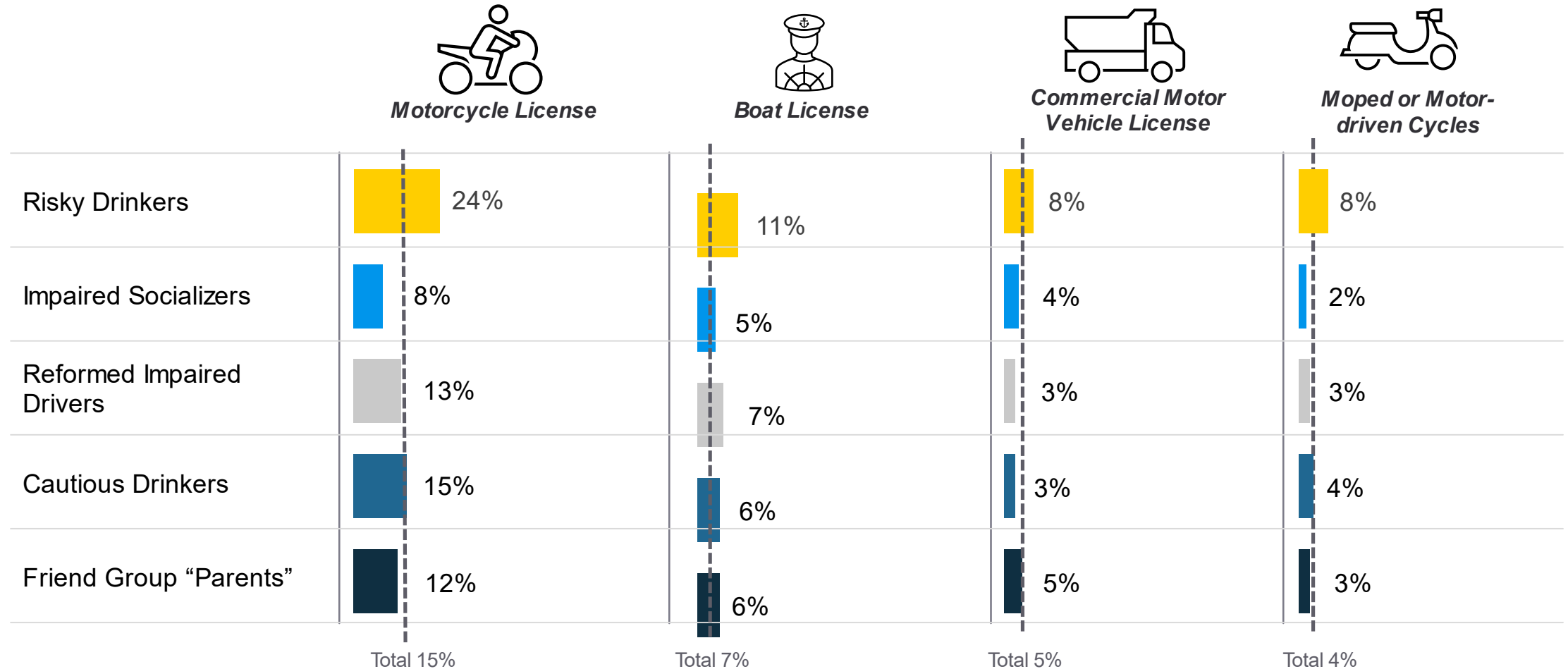
H6 Younger people (21 to 27 years old) will over-index in at least one segment and possibly account for most of that segment. They will show distinct attitudes and behaviors related to drinking.

✓ # The data **supports** this hypothesis.

- **Younger people over-indexes in multiple segments, but younger men and women concentrate differently.**
  - Younger men are most concentrated in the riskiest segment whereas younger women concentrate in the least risky segment.
    - Approximately 34% of younger male respondents segment into Risky Drinkers, compared to 25% of younger women.
    - Meanwhile, 40% of younger female respondents segment into Friend Group "Parents," compared with only 27% of younger male respondents.
  - Cautious Drinkers also over-index for younger people, at 22% (male and female combined).
  - Meanwhile, only 2% of younger people segment into Reformed Impaired Drivers, making up 5% of that segment.

H6

Younger people (21 to 27 years old) will over-index in at least one segment and possibly account for most of that segment. They will show distinct attitudes and behaviors related to drinking.

	Gen Z Ages 21-27	Millennials Ages 28-43	Gen X Ages 44-54
Risky Drinkers	27% 34% male* 25% female	54%	19%
Impaired Socializers	15%	55%	31%
Reformed Impaired Drivers	5%	48%	47%
Cautious Drinkers	26%	52%	22%
Friend Group "Parents"	28%	45%	27%
	Total 23%	Total 51%	Total 27%
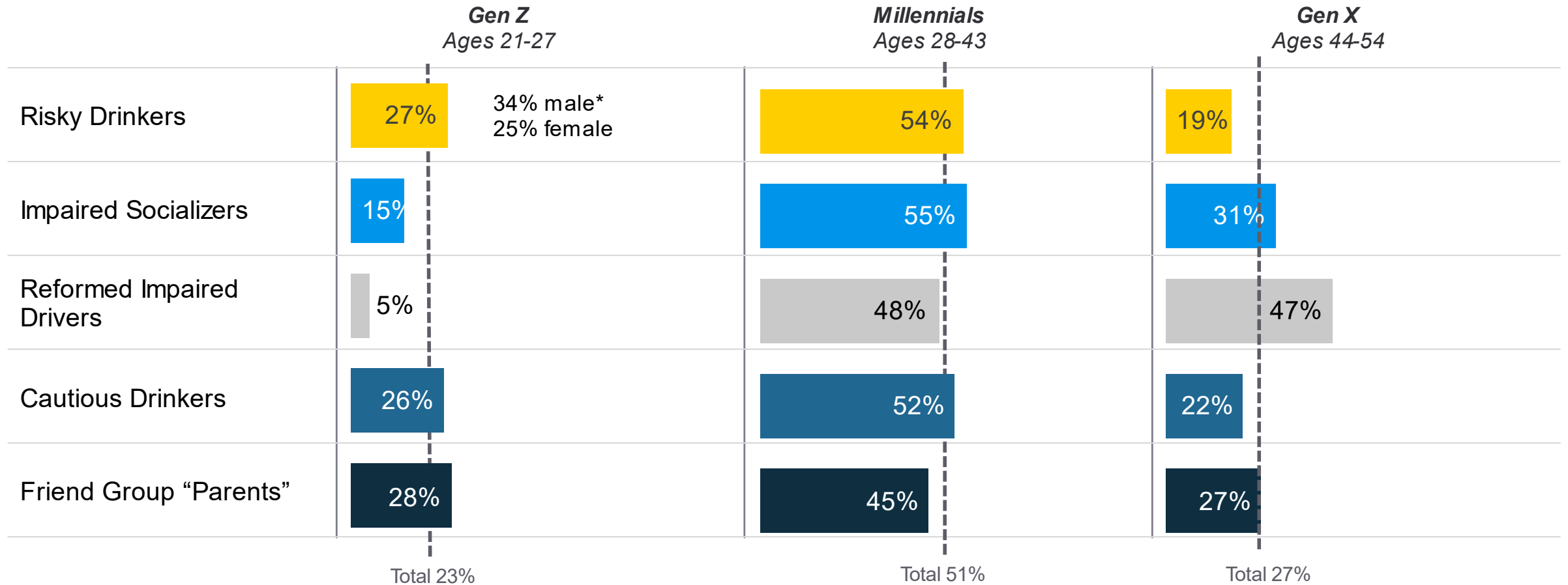
*That is, 34% of young male respondents classify as Risky Drinkers, not that young male respondents make up 34% of Risky Drinkers.

Please see notes for bases and question texts.

H7 Not all segments will be equally concerned about impaired driving, and some will be more receptive to messaging. Segments will differ both in their initial perceptions of risk and in the degree to which their perceptions of impaired driving's risk increase following the survey.

✓ # The data **supports** this hypothesis.

- **The riskiest segments have a lower perception of the risks of drinking and driving.**
  - o Risky Drinkers and Impaired Socializers fall below the mean on their perception of the severity of impaired driving consequences.

- **Pre-post scores show differentiation in moveability.**
  - o Risky Drinkers are relatively immovable (+.04 shift), but other segments show greater susceptibility to messaging.
  - o Reformed Impaired Drivers (+.34), likely due to their experience, are the most receptive and movable through messaging.

H7

Not all segments will be equally concerned about impaired driving, and some will be more receptive to messaging. Segments will differ both in their initial perceptions of risk and in the degree to which their perceptions of impaired driving's risk increase following the survey.

	Severity Pre-Test Mean Score	Severity Post-Test Mean Score	Pre/Post Test Mean Change
Risky Drinkers	7.4	7.5	0.03
Impaired Socializers	7.9	8.2	0.34
Reformed Impaired Drivers	8.8	9.0	0.27
Cautious Drinkers	8.1	8.2	0.1
Friend Group "Parents"	8.7	8.9	0.17
	Total 8.1	Total 8.3	Total 0.18

Please see notes for bases and question texts.
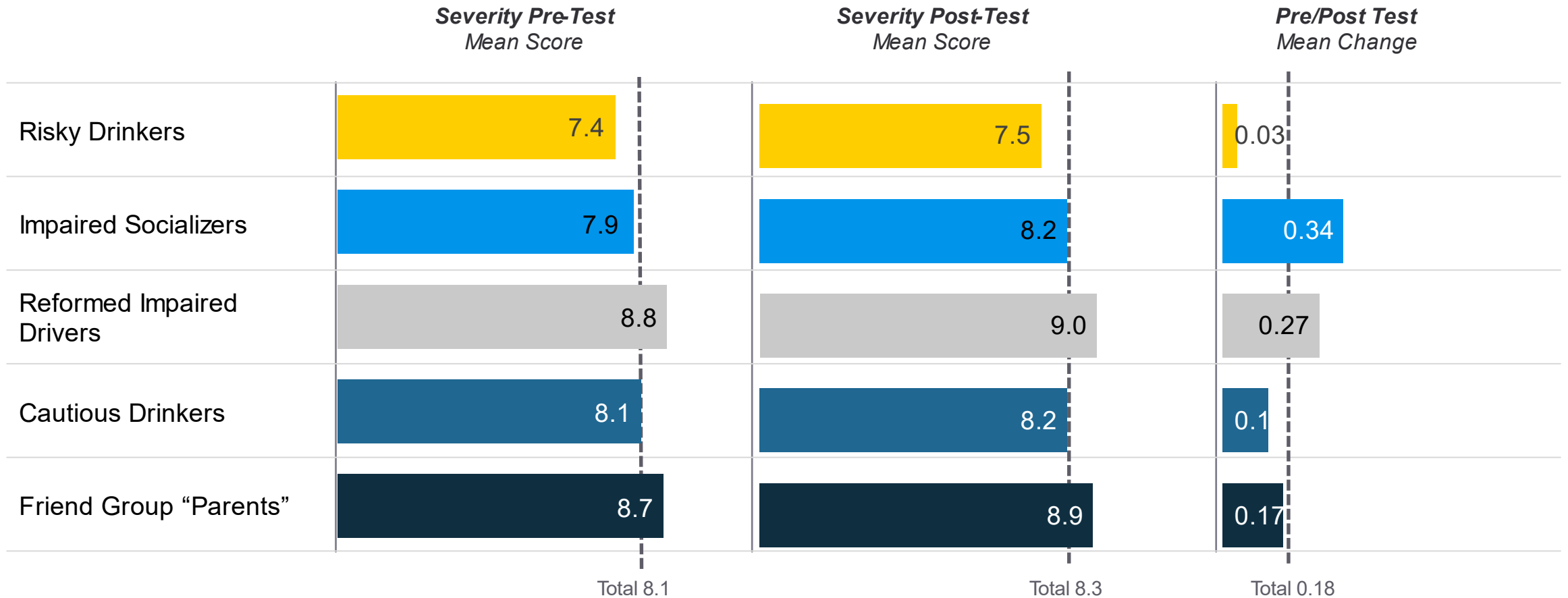
H8 Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.

✓ **The data supports this hypothesis.**

- **Segments' perceptions of the relative effectiveness of different advertising elements parallels their perceptions of risk motivators .**
    - o Risky Drinkers, who are less compelled by the risk of harming others, are also less moved by advertising elements that depict impact on loved ones (50% Very/Extremely Effective).

        - o This parallels their perception that a loved one being in a crash would be less likely to change their behavior compared to other segments (46% Very/Extremely Likely).

    - o Friend Group "Parents," who are most concerned about not harming others, are most compelled and influenced by advertising imagery that depicts impact on loved ones (76% Very/Extremely Effective).

        - o This is consistent with their belief that a loved one being in a crash would change their opinion on drinking and driving (70% Very/Extremely Likely).

H8

Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.

	Loved One Being in a Crash *Top Two Likely to Change Behavior (NET)*	**Advertising About Presence of Law Enforcement** *Top Two Likely to Change Behavior (NET)*	**Advertising About Dangers of Drinking and Driving** *Top Two Likely to Change Behavior (NET)*
Risky Drinkers	46%	31%	25%
Impaired Socializers	65%	28%	15%
Reformed Impaired Drivers	70%	35%	29%
Cautious Drinkers	59%	39%	36%
Friend Group "Parents"	70%	39%	37%
	Total 61%	Total 34%	Total 29%

Please see notes for bases and question texts.

H8 Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.
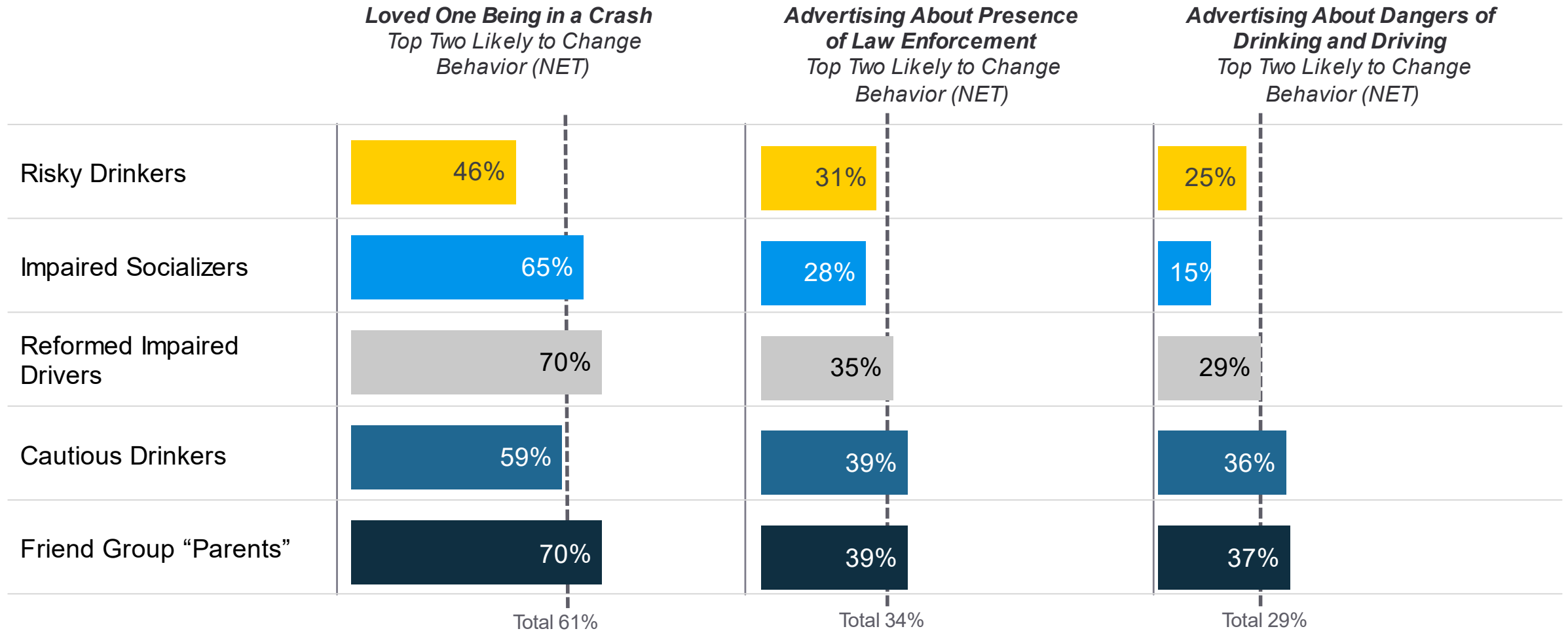
	"Drive Sober or Get Pulled Over" Slogan Very/Extremely Effective (NET)	*"Buzzed Driving is Drunk Driving" Slogan* Very/Extremely Effective (NET)	*Impact on Loved Ones* Very/Extremely Effective (NET)
Risky Drinkers	35%	36%	50%
Impaired Socializers	22%	22%	62%
Reformed Impaired Drivers	41%	41%	69%
Cautious Drinkers	51%	46%	67%
Friend Group "Parents"	49%	47%	76%
	Total 40%	Total 39%	Total 64%

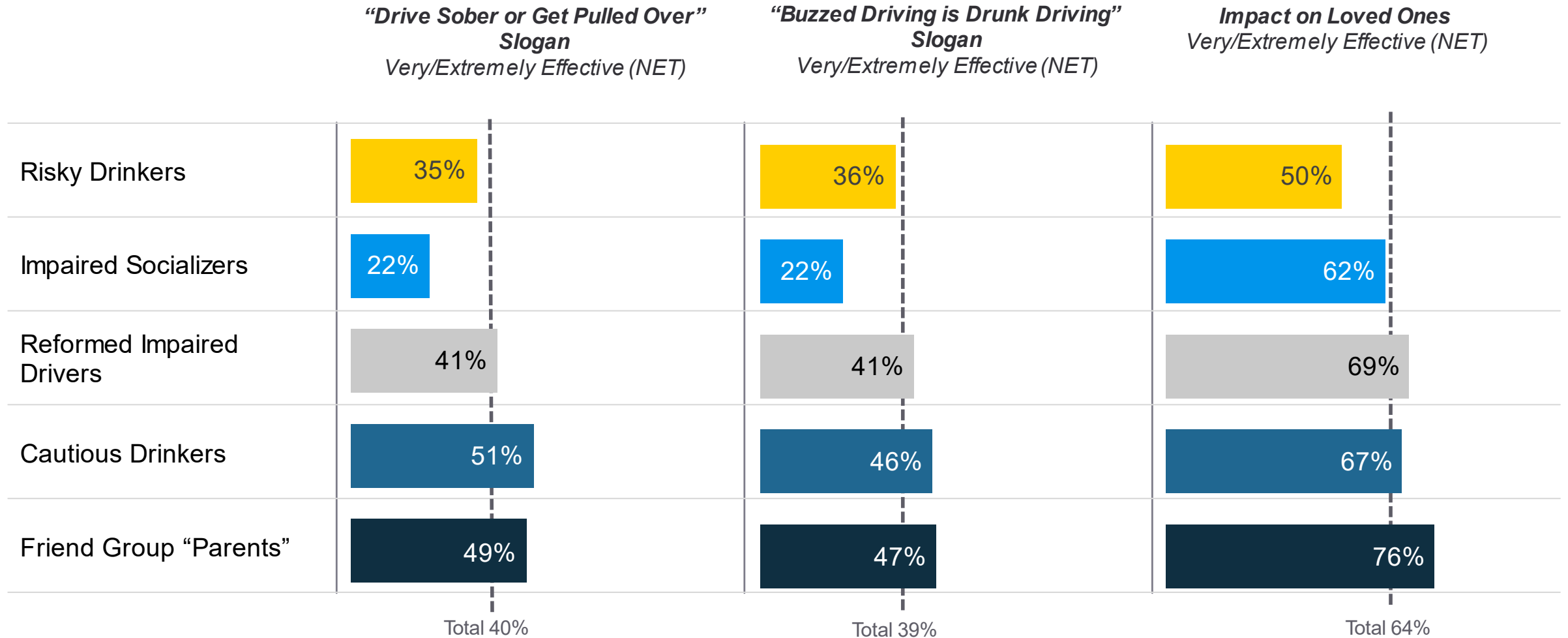Please see notes for bases and question texts.

H8

Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
A fatality because of a crash	68%	50% ①	66% ①	81% ①	67% ①	80% ①
Impact on loved ones	64%	50% ②	62% ②	69% ②	67% ②	76% ②
A person getting in a crash	55%	36%	46%	62% ③	62% ③	71% ③
Presence of law enforcement	55%	46% ③	47% ③	61%	60%	62%
A person in jail	53%	45%	40%	61%	59%	61%
A person getting arrested	52%	45%	41%	58%	59%	59%
A pullover over by law enforcement	46%	40%	31%	49%	54%	58%
Facts about drinking and driving	42%	36%	24%	43%	49%	55%
A person getting tested for sobriety	41%	38%	26%	40%	51%	49%
"Drive sober or get pulled over" slogan	40%	35%	22%	41%	51%	49%
"Buzzed driving is drunk driving" slogan	39%	36%	22%	41%	46%	47%

*Shading indicates over-index of 10%+

Question text and base in notes.

Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
They are believable	82%	71% ❶	84% ❶	91% ❶	82% ❶	90% ❶
They are memorable	67%	57% ❷	58%	76%	72% ❷	75% ❷
They make me think differently about driving under the influence of alcohol	65%	51%	59% ❷	77% ❸	72% ❷	75% ❷
They show situations I can relate to	62%	56% ❸	59% ❷	80% ❷	63%	63%
They get lost in other advertising	34%	42%	43%	25%	27%	27%
They make light of a serious situation	31%	44%	22%	23%	36%	25%
They are just trying to scare me	27%	41%	30%	20%	26%	16%
They are too unrealistic to be taken seriously	19%	32%	17%	14%	18%	11%
They show too much blood or gore	15%	32%	9%	7%	13%	7%

*Shading indicates over-index of 5%+
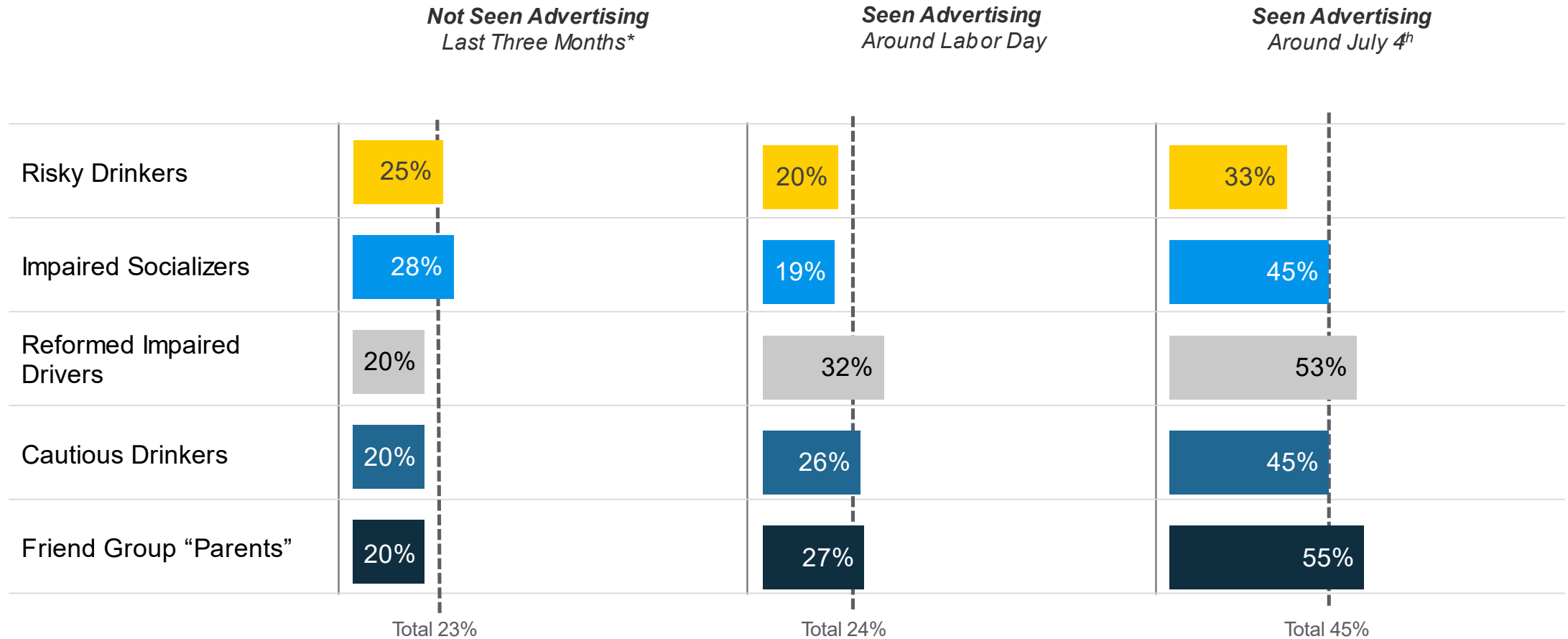
| Question text and base in notes.

H8

Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.

	Not Seen Advertising Last Three Months*	Seen Advertising Around Labor Day	Seen Advertising Around July 4th
Risky Drinkers	25%	20%	33%
Impaired Socializers	28%	19%	45%
Reformed Impaired Drivers	20%	32%	53%
Cautious Drinkers	20%	26%	45%
Friend Group "Parents"	20%	27%	55%
	Total 23%	Total 24%	Total 45%

Question text and base in notes.

H8

Segments will resonate with unique combinations of elements in advertising. Similarly, differences may arise in what segments say would change their opinions about drinking and driving.

	TOTAL	Risky Drinkers	Impaired Socializers	Reformed Impaired Drivers	Cautious Drinkers	Friend Group "Parents"
You can seriously hurt or kill someone else when drinking and driving	**70%**	55% ❶	68% ❶	76% ❶	72% ②	82% ❶
You can seriously hurt or kill yourself when drinking and driving	**67%**	52% ②	60% ②	74% ②	76% ❶	78% ②
A DUI or DWI can ruin your life (lose your job, lose a scholarship, etc.)	**62%**	51% ③	53%	69%	68% ③	71% ③
Law enforcement is cracking down around holidays or special events	**60%**	47%	56% ③	70% ③	67%	67%
A DUI or DWI can affect your whole family	**60%**	50%	49%	64%	68% ③	69%
Law enforcement is cracking down all the time	**52%**	44%	34%	59%	66% ③	60%

*Shading indicates over-index of 7%+

| Question text and base in notes.

H9 Segments will differ by peer attitudes toward drinking and driving. Some segments will indicate that their peer groups are more accepting of drinking and driving, whereas others will be strongly against it.
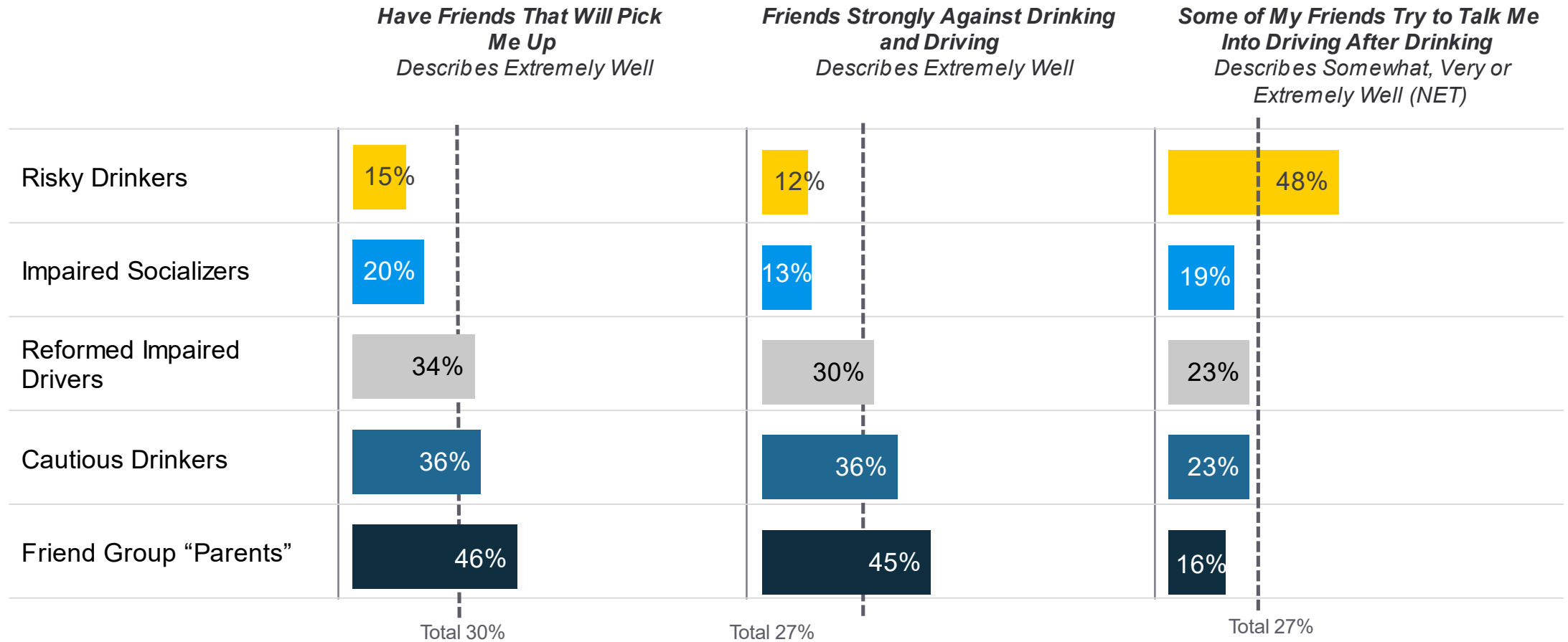
✓ **The data supports this hypothesis.**

- **Segments exemplify the idea that "you are who you surround yourself with." Riskier segments have riskier friends.**

  o Risky Drinkers are considerably more likely to have friends that are at least somewhat likely to try to talk them into drinking and driving behaviors (48%), but also believe their friends are less likely to pick them up or be strongly opposed to drinking and driving.

  o While Impaired Socializers under-index on having friends who try to talk them into impaired driving, they are also less likely then lower-risk segments to have friends who would pick them up or be strongly opposed to drinking and driving.

  o Conversely, Friend Group "Parents" over-index on having friends who will pick them up and be strongly against impaired driving. They believe their friends would not pressure them into a situation where they would drink and drive.

H9 Segments will differ by peer attitudes toward drinking and driving. Some segments will indicate that their peer groups are more accepting of drinking and driving, whereas others will be strongly against it.

	Have Friends That Will Pick Me Up *Describes Extremely Well*	Friends Strongly Against Drinking and Driving *Describes Extremely Well*	Some of My Friends Try to Talk Me Into Driving After Drinking *Describes Somewhat, Very or Extremely Well (NET)*
Risky Drinkers	15%	12%	48%
Impaired Socializers	20%	13%	19%
Reformed Impaired Drivers	34%	30%	23%
Cautious Drinkers	36%	36%	23%
Friend Group "Parents"	46%	45%	16%
	Total 30%	Total 27%	Total 27%

Please see notes for bases and question texts.

Thank You