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strategic market
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Motorcycle Safety Campaign

Campaign Monitor – Wave 5 (2013)

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TABLE OF CONTENTS

Executive summary	1
1.0 Background and objectives	4
2.0 Methodology	6
2.1 Target population and data collection	6
2.2 Sample	6
2.3 Field statistics	7
2.4 Weighting and statistical notes	8
2.5 Respondent characteristics	9
3.0 Detailed findings	10
3.1 Motorcycle type and usage	10
3.2 Sources of information	14
3.3 Advertising recall	20
3.4 Motorcyclists' attitudes and behaviours	32
3.5 Riding under the influence of alcohol or drugs	38
3.6 Attitudes to Road Safety	46

Appendix 1: Questionnaire

EXECUTIVE SUMMARY

This report details the findings of the fifth wave of tracking of TAC's motorcycle campaign, and the attitudes and behaviours of motorcycle riders. For this study 250 interviews were conducted with motorcycle riders via telephone, at 50 per week for five weeks, over February and March 2013.

Advertising

The TAC advertisement, 'The Ride', was on air between the 8th and the 21st of February, the first two weeks of the five weeks of this tracking research. **Results for the ad are largely positive**, with strong spontaneous recall and message delivery, and some evidence of it **having an impact on attitudes towards speeding**.

In particular:

- Half (50%) of respondents were able to spontaneously describe this ad – a very strong result compared to other campaigns in Wallis' ad database. **Spontaneous recall was especially strong** during the two weeks the ad was on air (57% vs 45% during the three weeks following once the ad had gone off air).
- The **message take-out** amongst those spontaneously recalling the ad was largely **on target**, with the key messages replayed being as follows:
 - Wear protective clothing (26%);
 - Slow down or don't speed (24%);
 - Don't ride irresponsibly (23%);
 - Riders of motorbikes and scooters need to be more careful (23%).
- The proportion of all respondents who were able to recognise the ad (after a description was read out) was also high, at three quarters (73%).
- Advertising diagnostic measures included in the questionnaire to aid interpretation of how riders viewed the ad suggested that it was 'attention getting', 'believable', and 'said important things'.
- There is some evidence suggesting that **'The Ride' may have had an impact on peoples' attitudes towards the risk of speeding**. Evidence is that:
 - Those who spontaneously recalled 'The Ride' were significantly more likely to consider speeding in 50 and 60 kph zones to be high risk, and
 - 'Slow down/ don't speed' was perceived to be one of the main messages of this ad.

Motorcycle Usage

As has been the case in previous Waves, the majority of respondents (68%) mostly ride a road bike while just over a quarter (27%) reported riding an off-road or trail bike. Off-road or trail bikes are more likely to be ridden by people living outside Melbourne.

Riders of on road and off road/trail bikes are **both more likely to mainly ride for recreational than commuting purposes**. Nevertheless, a substantial minority of road bike riders are more likely to ride mainly for commuting purposes (31% vs. 16% of off-road/trail bike riders).

Sources of Information

The **sources of information used by riders are largely consistent with previous Waves**, with the majority getting information from either the **Internet** (34%) **magazines** (29%) or family or friends (15%).

There are differences by age, with those aged under 40 being significantly more likely to use the Internet for information (49% vs 26% amongst those aged 40 or over). By contrast, those aged under 25 are least likely to use magazines (7%). These results suggest that content in print editions of magazines will be of limited effectiveness in reaching 18 to 25 year olds; while older riders will benefit from both magazines and Internet.

Awareness of the Spokes website has trended upwards since Wave 1 (when it was 19%), and in this Wave reached three in ten (32%). Comparable with previous waves, about four in ten who were aware of the site visit it.

Attitudes and Behaviours - Speed

One in eight (12%) of respondents reported that they had been pulled over in the past three months by police while riding their motorcycle, usually for a breath test or license check.

One in five (21%) motorcyclists claimed they never speed, a lower proportion than in Waves 3 or 4, but a similar proportion to Waves 1 and 2. The most likely to self-report speeding were those aged 26 to 39.

As has been seen in the past, **as posted speed increases so the proportion of motorcyclists who speed increases too**. Over time, with the exception of Wave 4, three-quarters (75%) of motorcyclists say they stick to the limits in a 50 k/ph zone, seven in ten (70%) in a 60 k/ph zone and only half (50%) at 100 k/ph.

As has been the case in previous Waves, the **perceived risk of having a crash if speeding is higher in 50k/ph** (43% perceived a high risk) **or 60 k/ph** (46%) zones than in 100 k/ph zones (28%).

Attitudes and Behaviours – Drink Riding

Attitudes and behaviours towards drink riding were largely similar to previous Waves.

Respondents were asked what they believed their risk of being caught drink riding was over the next week, if they were to do so. Four in ten (39%) thought they had a high risk of being caught, while three in ten (30%) believed the risk was moderate.

When asked to rate their perceived risk of having an accident if drink-riding, seven in ten (70%) believed there was a high risk and around a quarter (24%) thought there was a moderate risk.

A small proportion (3%) self-reported they had ridden a motorcycle in the past three months while near or over 0.05 BAC.

Attitudes and Behaviours – Drug Riding

The vast majority of respondents (91%) believe they would be at high risk of having an accident if they rode a motorcycle under the influence of drugs, a slightly higher result than recorded in previous waves. It is worth noting that a greater proportion believes they would be at high risk of an accident after riding on drugs versus drink-riding (70%).

Road Safety

The majority of riders interviewed (72%) believed they had responsibility for ensuring they are seen by other motorists. This view is held by riders of all types.

Attitudes towards protective clothing were largely similar in Wave 5 to previous waves. Motorcycle riders were particularly likely to agree that:

- Motorcycle clothing protects me in the event of a crash (97%);
- I would support a government rebate scheme to help purchase motorcycle clothing (86%).

1.0 BACKGROUND AND OBJECTIVES

This is the fifth wave of a continuous survey first commissioned by the Transport Accident Commission (TAC) in 2009 to track motorcycle rider attitudes and behaviours in relation to road safety issues and to measure the prompted recall of motorcycle advertising campaigns when on air.

The first two waves of the survey comprised of 50 interviews with riders per week for 35 weeks, and were conducted between September 2009 and April 2010 (Wave 1) and between September 2010 and April 2011 (Wave 2).

Waves 3, 4 and 5 of the Motorcycle Tracking Survey have been conducted in three short waves timed to coincide with motorcycle television advertising in October 2011, April 2012 and February/March 2013.

The specific objectives of the February/March 2013 Wave 5 survey were to:

- Administer the Motorcycle Tracker by telephone interview,
- Explore the characteristics of the Victorian motorcycle rider population with respect to attitudes and behaviours relating to a number of road safety issues,
- Track changes in attitudes and self-reported behaviours of Victorian motor cycle riders,
- Identify potential areas of concern within the motorcycle community,
- Provide information that assists in the development of programs that address these concerns,
- Evaluate the effectiveness of current (in this case, *The Ride*) by measuring the prompted recall of motorcycle advertising campaigns when on air.

As one of the most important objectives of this study was to evaluate the effectiveness and impact of the TAC's *The Ride* advertising campaign, two new lines of questioning were introduced into the questionnaire to enhance this evaluation. These enhancements were to:

- **Include a 'spontaneous recall' question** where respondents were asked to describe any advertising they had seen or heard recently promoting road safety. The benefit of including this question is that it enhances the ability to evaluate the effectiveness of the campaign. If a respondent is able to spontaneously recall an ad it indicates more about the likely strength of the connections in the respondents' memories than if they were only able to recognise the ad when prompted. Wallis has examined whether the views of those who spontaneously recalled the campaign varied from the rest of the population and to what extent these different views were due to the advertisement.
- **Include diagnostics questions after the ad recognition question.** Such diagnostic questions can assist in pinpointing which components of an ad are working, and which are not. This was achieved by asking those respondents who had recognised the advertisement how they rated the ad on several 10 point

scales – for example, to what extent viewers found the ad ‘different’, ‘believable’ or as ‘saying some important things’. Including these questions has provided insight into how the campaign has been perceived across different demographic groups.

In addition to providing findings from the Wave 5 study, comparisons have been made between the results from this study and previous waves of this research where appropriate.

2.0 METHODOLOGY

2.1 TARGET POPULATION AND DATA COLLECTION

Wave 5 of the TAC Motorcycle Tracking study surveyed 250 motorcycle and motor scooter riders aged 18 to 70 who had ridden in the last 12 months.

The survey was conducted via Computer Assisted Telephone Interviewing (CATI). Fifty riders were interviewed during several days per week for a period of five weeks, as follows:

- Week 1 (week commencing February 12th)
- Week 2 (w/c February 19th)
- Week 3 (w/c February 26th)
- Week 4 (w/c March 4th)
- Week 5 (w/c March 12th).

The first two weeks of interviewing in Wave 5 were timed to coincide with the airing of ‘The Ride’ campaign. The television component of the campaign was launched on Friday February 8th, and was on air until Thursday February 21st. A summary of the planned TARP spend for the television campaign can be seen in the table below:

Table 1: Campaign schedule

Date		04 Feb	11 Feb	18 Feb	25 Feb	04 Mar	11 Mar
Week of campaign (8 Feb to 21 Feb)		Week 1	Week 2	Week 3			
Metropolitan television	Network 7/9/10 (inc. SBS/CH31) - 25% digital	60	200	175			
Regional television	Vic agg	60	200	175			
	Mildura solus	60	200	175			
Week of interviewing		Week 1	Week 2	Week 3	Week 4	Week 5	

*Figures shown to quantify campaign spend are target audience rating points (TARPs)

2.2 SAMPLE

The TAC supplied sample obtained from VicRoads which consisted of registered motorcycle owners and license holders. Around 500 numbers were provided in a password encrypted file on a weekly basis. New sample was provided each week.

The sample frame was divided into 6 segments – males and females were each divided into three age groups: 18-25, 26-39 and 40+. The sample was stratified with random selection proportional to population, boosted for the younger age group.

Mobile phone usage

Respondents were asked whether they had a mobile phone and which phone they received most of their calls on. There was a significant increase in the proportion who have a mobile, with almost all (97%) owning one compared to nine in ten (92%) in Wave 4. Two thirds (66%) of respondents use their mobile phone for all or most of their private calls.

2.3 FIELD STATISTICS

Interviews were conducted across several days each week of fieldwork, and on average the questionnaire took 19 minutes to complete.

The following table shows the interviewing statistics overall and on a week by week basis. The response rate, considering interviews from the total sample, was 9%. However, many records were either unusable (incorrect details), unable to participate (did not ride a motorcycle/language difficulties) or in progress at the cessation of interviewing (no answer etc. – these may have yielded an interview should interviewing have continued past quotas). If we exclude these and look just at those who were successfully contacted and offered the opportunity to participate, the response rate was 36%.

Table 2: Field statistics

	Total	Week 1	Week 2	Week 3	Week 4	Week 5
Total sample fielded	2,665	637	629	514	475	410
Completed interview	250	50	50	50	50	50
Response rate based on usable sample with final outcome	36%	28%	38%	38%	36%	40%
Response rate based on total sample	9%	8%	8%	10%	11%	12%
Refusals	454	127	80	82	89	76
Soft refusal (Does not wish to participate in this study only)	114	26	15	33	22	18
Hard refusal (Does not wish to participate in TAC research again)	325	97	62	47	63	56
Do not call list	4	1	1	0	1	1
Refused to continue / cancelled interview	11	3	2	2	3	1
In progress	1,045	257	299	216	162	111
Busy tone / engaged	10	2	4	0	0	4
Fax / Modem	24	7	3	4	6	4
No answer	298	55	89	61	41	52
Answering machine / voice mail service	583	118	183	137	99	46
Make appointment to call back	130	75	20	14	16	5
Ineligible	343	72	65	71	71	64
Not a motorcycle rider	332	70	63	71	66	62
Language difficulties / ineligible to continue	11	2	2	0	5	2
Unusable sample	573	131	135	95	103	109
Not a residential number	44	2	13	11	7	11
Disconnected	296	90	80	53	46	27
Named person not known / wrong number	126	38	26	9	24	29
Not available / away for duration of survey	107	1	16	22	26	42

* $interviews/(interviews+refusals)$

** $interviews/fielded\ sample$

2.4 WEIGHTING AND STATISTICAL NOTES

The survey data was post-weighted so that it reflected the target population of the research (that is, Victorian motorcycle riders aged 18 to 70). The following table details the population, achieved interviews and the associated weighting factors.

Table 3: Weighting of Wave 5 in detail

Location	Gender	Age	Population		Completed interviews		Weighted proportion	Weight Factor
			#	%	#	%	%	#
Melbourne	Male	18-25 years	12,917	4%	11	4%	4%	0.83
		26-39 years	58,030	16%	50	20%	16%	0.82
		40-70 years	121,920	35%	60	24%	35%	1.44
Regional / rural Victoria	Male	18-25 years	6,605	2%	9	4%	2%	0.52
		26-39 years	24,449	7%	38	15%	7%	0.46
		40-70 years	85,730	24%	57	23%	24%	1.07
Melbourne / regional / rural Victoria	Female	18-25 years	2,337	1%	8	3%	1%	0.21
		26-39 years	12,882	4%	7	3%	4%	1.31
		40-70 years	27,338	8%	10	4%	8%	1.94
Total			352,208	100%	250	100%	100%	1.00

The following table details the weighting of Wave 5 versus previous waves of the survey.

Table 4: Weighting comparison between waves

Location	Gender	Age	Number of surveys completed (unweighted)					Survey sample (weighted)			Weight Factor				
			Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 1	Wave 2-4	Wave 5	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Melbourne	Male	18-25 years	444	129	32	16	11	19%	3%	4%	0.63	0.27	0.2	0.32	0.83
		26-39 years		387	76	55	50		17%	16%		0.54	0.52	0.56	0.82
		40-70 years	367	309	55	43	60	35%	35%	35%	1.37	1.43	1.5	1.5	1.44
Regional / rural Victoria	Male	18-25 years	352	129	18	18	9	9%	1%	2%	0.35	0.14	0.19	0.15	0.52
		26-39 years		287	59	41	38		7%	7%		0.32	0.29	0.33	0.46
		40-70 years	452	370	79	55	57	25%	25%	24%	0.8	0.86	0.75	0.85	1.07
Melbourne / regional / rural Victoria	Female	18-25 years	79	17	10	7	8	4%	1%	1%	0.74	0.35	0.11	0.12	0.21
		26-39 years		62	15	9	7		4%	4%		0.74	0.57	0.74	1.31
		40-70 years	61	55	9	10	10	8%	8%	8%	1.78	1.74	1.98	1.4	1.94
Total			1,755	1,745	353	254	250	100%	100%	100%	1.00	1.00	1.00	1.00	1.00

It is usual practice to test survey data at a confidence interval of 95%. However, given the small base size for this study, and the requirement to test subgroups, these data have been tested at 80% and 90% confidence intervals. In cases where reported results are not statistically significant, these have been noted. As the data were weighted, the base was adjusted to take these weights into account when performing significance tests (the effective base). The following table shows the confidence intervals by some key groups.

Table 5: Confidence intervals

Confidence intervals for some key groups of interest		Total	Gender		Age			Location			Spont. Recall	
			Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Saw 'The Ride'	Did not see 'The Ride'
	Base	250	225	25	28	95	127	135	90	25	118	132
	Effective base	214	200	18	23	85	122	122	75	20	103	111
Confidence interval	Survey estimate	± %	± %	± %	± %	± %	± %	± %	± %	± %	± %	± %
90%	10%	3.4	3.5	11.6	10.3	5.4	4.5	4.5	5.7	11.0	4.9	4.7
	50%	5.6	5.8	19.4	17.2	8.9	7.5	7.5	9.5	18.4	8.1	7.8
80%	10%	2.6	2.7	9.1	8.0	4.2	3.5	3.5	4.4	8.6	3.8	3.6
	50%	4.4	4.5	15.1	13.3	6.9	5.8	5.8	7.4	14.3	6.3	6.1

2.5 RESPONDENT CHARACTERISTICS

The following table presents respondent characteristics overall and by week of interview. Note that “Melbourne Metro” refers to all of greater Melbourne, while “Other Urban” refers to regional centres and “Regional Balance” refers to rural Victoria.

Table 6: Respondent characteristics by week of interviewing

	Total	Age			Gender	
		18-25	26-39	40+	Male	Female
	%	%	%	%	%	%
	250	28	95	127	225	25
Type of licence						
Learner	1	3	-	1	1	-
Probationary	4	24	9	-	4	6
Full	95	73	91	99	95	94
Location						
Melbourne Metro	61	66	71	57	62	51
Other Urban	30	7	6	11	8	19
Regional Balance	9	28	23	33	30	30
Type of bike						
Road Bike	68	60	66	69	70	54
Off-road or trail bike	27	34	29	25	27	26
Scooter	6	6	4	6	4	21
Don't know	0	-	1	-	<1	-
Distance travelled in past year						
0-1,999km	34	34	37	33	32	48
2,000-4,999km	21	8	19	23	22	15
5,000-9,999km	19	28	20	17	20	9
10,000-19,999km	18	18	10	21	20	-
20,000+km	6	13	11	3	5	10
Don't know	3	-	4	4	1	19

3.0 DETAILED FINDINGS

This section of the report details the findings of Wave 5 of the TAC's Motorcycle tracking study. The findings are presented under the following headings:

- Motorcycle type and usage;
- Sources of motorcycle information;
- Advertising recall;
- Motorcyclists' attitudes and behaviours; including self-reported attitudes to riding under the influence of alcohol or drugs; and their Attitude toward road safety.

3.1 MOTORCYCLE TYPE AND USAGE

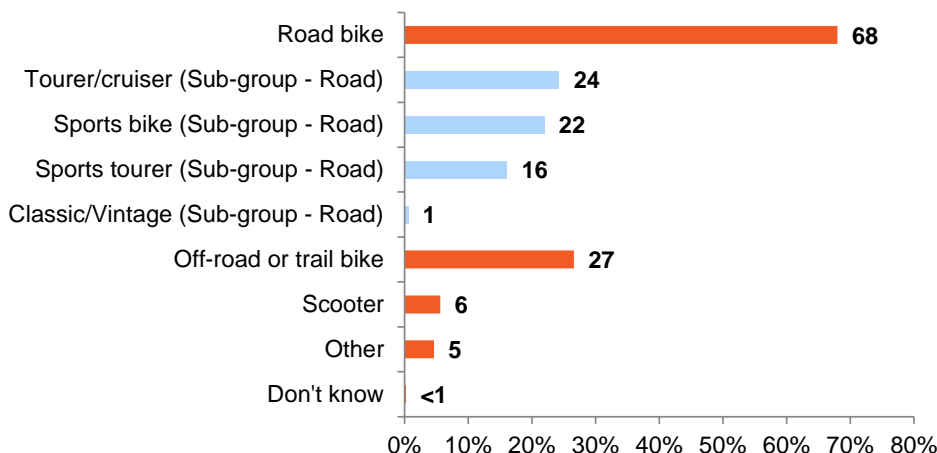
Respondents were asked which type of motorcycle they mostly ride; a road bike, off-road/trail bike or scooter. Those who reported they mostly rode a road bike were asked which type of road bike they mainly ride; a touring or cruiser bike, a sports tourer, a sports bike or a classic/vintage bike. The results of these two questions have been combined and are presented in Chart 1.

The majority of respondents (68%) mostly ride a road bike (of whom 24% rides a touring or cruiser bike, 22% rides a sports bike and 16% rides a sports tourer). Very few (1%) reported riding a vintage or classic bike.

Just over a quarter (27%) of respondents reported riding an off-road or trail bike. There is a clear difference based on where people live. Those living in Melbourne are significantly more likely to ride a road bike than those living in 'Other Urban' locations (75% vs 62%). The reverse is true for off road or trail bikes – these bikes are significantly more likely to be ridden by those living in 'Other Urban' locations than in Melbourne (31% vs 19%). While not statistically significant due to the small sample size (n=25), those in 'Regional Balance' locations were also more likely to mostly ride off road or trail bikes (62%).

Around one in twenty (6%) respondents mostly ride a scooter—a decline from one in ten (9%) at Wave 4. Although the base size is too small to produce a significant result, indicatively it appears that females are more likely than males to ride a scooter, with one in five (21%) females mostly riding a scooter.

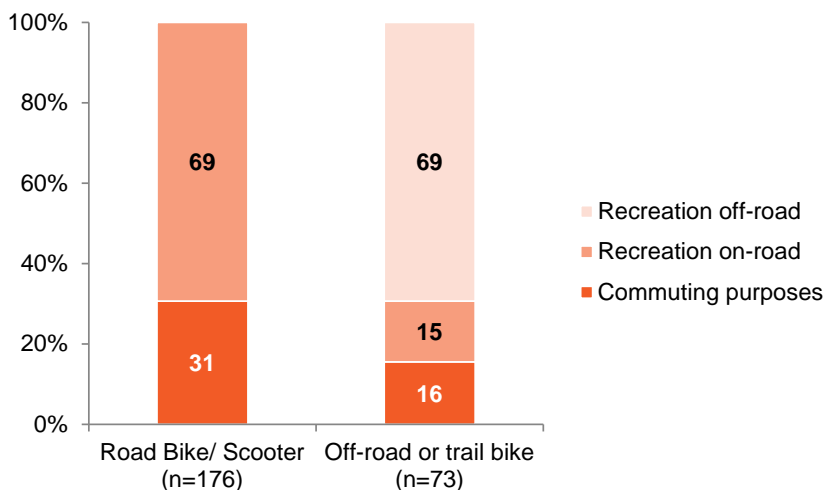
Chart 1: Type of bike mostly ridden



Q7 - What type of motorcycle do you mostly ride? (All respondents, n=250)
 Q8 - What type of road bike do you mainly ride? (All who ride a road bike, n=333)

Chart 2 shows the main riding purpose by type of bike ridden. As can be seen, seven in ten (69%) of **road bike riders** ride mostly for recreation, while three in ten (31%) ride mostly for commuting purposes. Those who mostly ride **off-road motorcycles** predominately engage in recreational riding off-road (69%), with one in six (15%) riding mostly recreationally on-road and a further one in six (16%) mostly riding for commuting purposes.

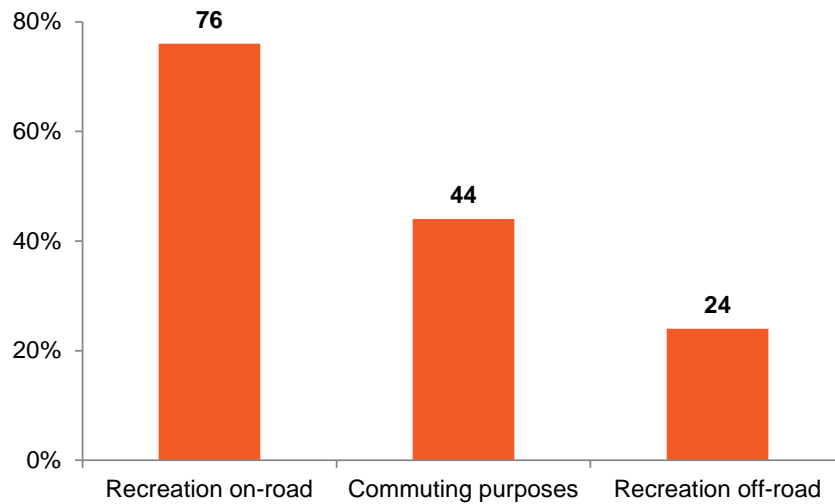
Chart 2: Type of bike by purpose



Q7 - What type of motorcycle do you mostly ride?
 Q9 - Thinking about your riding over the last 12 months, what percentage of the time do you ride in the following categories?

Overall as Chart 3 indicated over the page, just over three-quarters (76%) of respondents rides on-road recreationally, while just over four in ten (44%) commutes at least occasionally. A quarter (24%) rides off-road.

Chart 3: Total participation in each type of riding

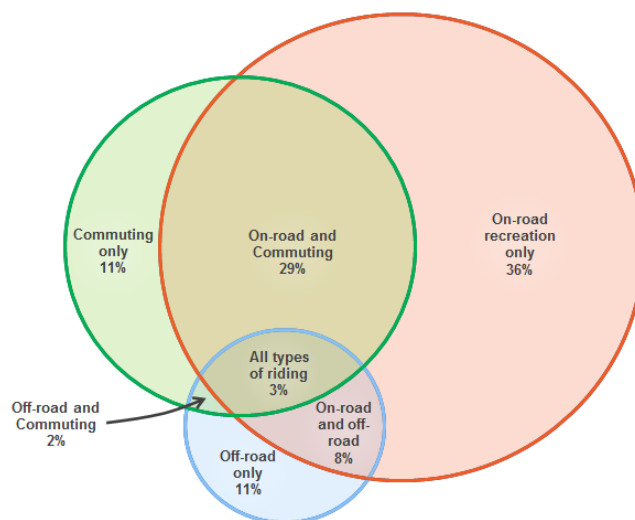


Q9 - Thinking about your riding over the last 12 months, what percentage of the time do you ride in the following categories? (All respondents, n=250, some participants engage in more than one type of riding)

The Venn diagram in Chart 4 shows the various degrees to which riders engage in multiple riding activities. The majority of respondents ride recreationally on road, with around a third (36%) of riders only ride their motorcycles on the road recreationally; while three in ten (29%) ride on the road recreationally as well as commute.

Riders who solely commute are less common; with only one in ten (11%) saying they only ride their bikes when commuting. One in twelve (8%) riders ride both off-road and on road recreationally, while one in ten (11%) ride only off-road. A small proportion (2%) rides off-road and commutes. One in thirty (3%) riders participates in all types of riding.

Chart 4: Types of riding



Q9 - Thinking about your riding over the last 12 months, what percentage of the time do you ride in the following categories?(All respondents, n=250)

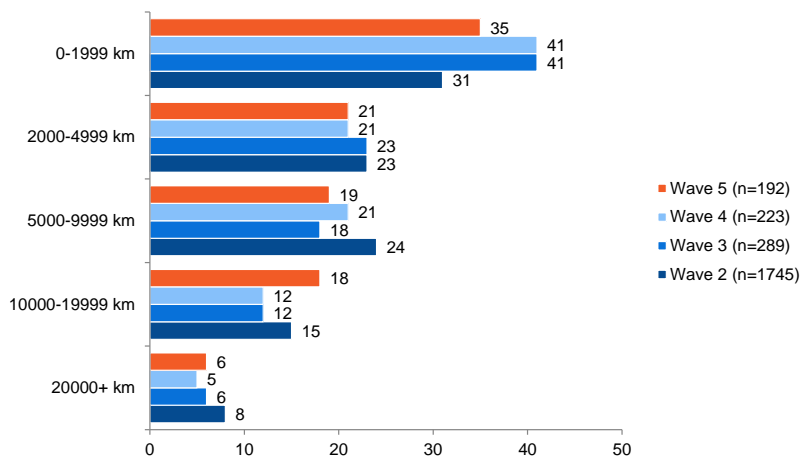
Distance travelled

Respondents were asked to estimate the total distance they had ridden on the road in the past year as well as the previous two weeks. Chart 5 details the distance travelled over the past year, with comparisons to previous Waves.

The average distance travelled was 5,450kms; greater than the average of 4,660kms recorded at Wave 4 but on par with Wave 3 (5,898kms) and less than Wave 2 (6,892kms). Despite the average distance travelled, a sizable proportion (35%) of respondents travelled less than 2000kms over the course of the year.

As might be expected, the average distance travelled in the past year is significantly greater for those who commute (6,872 kms) or travel on-road (5,270 kms) than amongst those who travel off-road (2,560 kms).

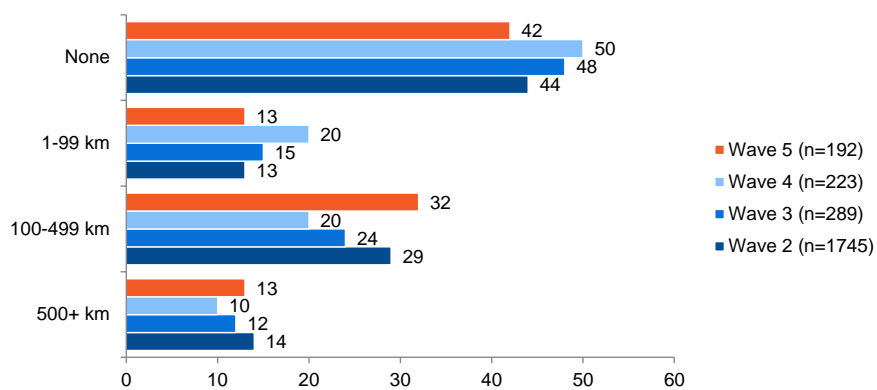
Chart 5: Distance travelled in the past year



Q10 - In the last year, how many kilometres have you ridden on road?
 (Base: All who have ridden on-road)

Four in ten respondents (41%) had not ridden at all in the past two weeks while the remainder (59%) had done so. Those who commute are more likely to have ridden in the past two weeks (73%) than those who ride on road (58%) or off-road (47%).

Chart 6: Distance travelled in the past two weeks



Q11 - In the last two weeks, how many kilometres have you ridden on road?
 (Base: All who have ridden on-road)

3.2 SOURCES OF INFORMATION

Respondents were asked a series of questions about where they get information regarding motorcycling in general, as well as specific questions relating to the SPOKES website.

General sources of information

The sources of information used by riders are largely consistent with previous Waves. The majority of riders use either the Internet (34%) or magazines (29%).

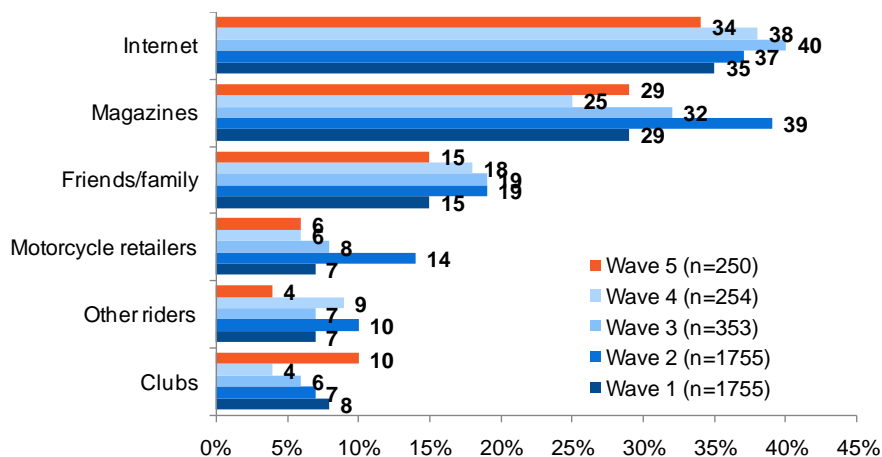
- The Internet was more likely to be used by younger riders (49% of those aged between 18 and 39 versus 26% of those aged over 40 years).
- Despite small base sizes, the results indicatively point to low use of magazines amongst 18 to 25 year olds (7%) compared with older riders (31%).
- Riders over the age of 40 were almost as likely to source information from the Internet (26%) as magazines (31%).

These results suggest that content in print editions of magazines will be of limited use in communicating to 18 to 25 year olds, while older riders will benefit from information across both media.

Word of mouth is also a significant source of information with one in six (15%) asking friends and family about motorcycling issues. While the base size is too small to produce a statistically significant result, females (29%) appear to be more likely to speak with friends and family about motorcycling than males (13%). Other word of mouth sources of information included motorcycle clubs (10%), retailers (6%) and other riders (4%).

A difference between Wave 4 and the present Wave is that the proportion who reported *other riders* as a source of information declined (from 9% to 4%) while those that reported *motorcycle clubs* as a source increased (from 4% to 10%).

Chart 7: Sources of information on motorcycling generally

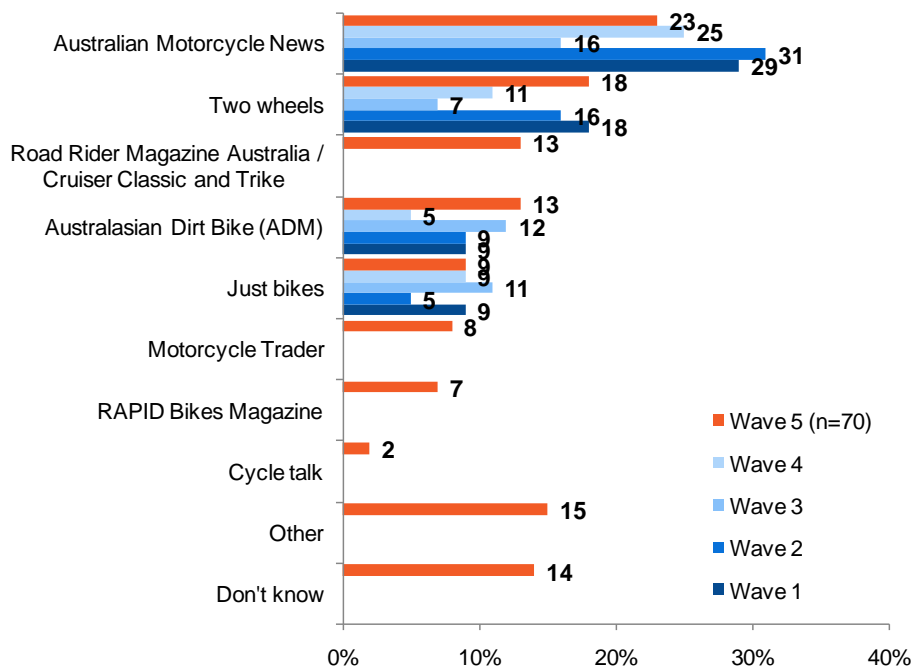


Q12 - Where do you get information about motorcycling in general? (Base: All respondents)
 (Multiple Response / Other category excluded)

Respondents who cited magazines as a source of information were asked which magazines they bought. The most popular magazine is Australian Motorcycle News, purchased by a quarter (23%) of respondents. Two Wheels is also popular, with one in five (18%) purchasing it. Given the small base size, it is not possible to conduct an analysis of the readership characteristics of each magazine.

It is worth noting however that these magazines do have an online presence, and that some people, particularly younger riders, may read the online editions of these magazines. Moving forward with this tracking study it may be advisable to test the most popular magazines for both print and online – depending on media placement strategies.

Chart 8: Which magazines were bought by motorcycle riders



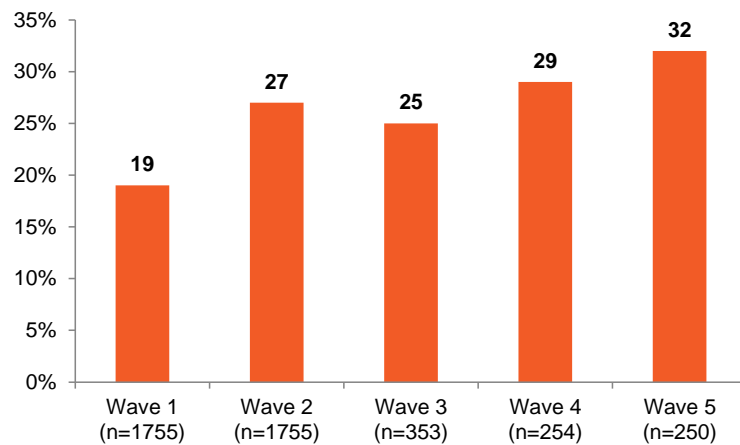
Q13 - Which magazines do you buy?
 (Base: Base: All who get information about motorcycling from magazines)
 (Multiple response / only top mentions included for Waves 1 to 4)

The Spokes website

The Spokes website aims to provide riders with safety information relating to riding motorcycles. Awareness of the site has been tracked since Wave 1, and since then awareness has been trending upwards, ranging from one in twenty (19%) at Wave 1 to a third (32%) in the current measure.

- Awareness was highest amongst respondents aged 26 to 39 (44%) and lowest amongst those who ride off-road (27%).

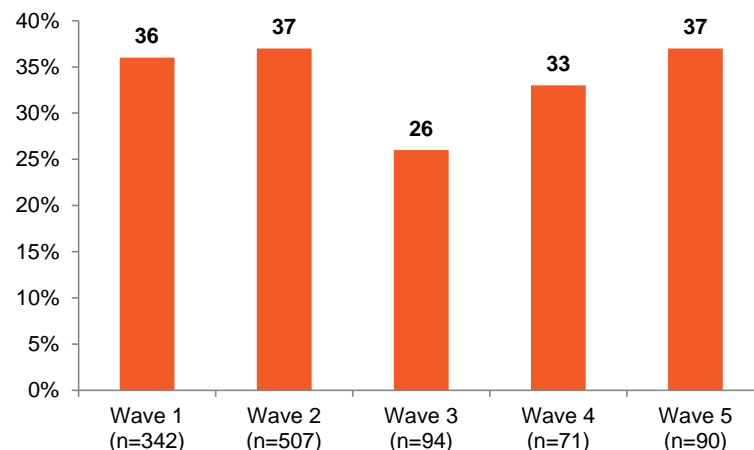
Chart 9: Awareness of the “Spokes” website



Q14 - Are you aware of the SPOKES website? (All respondents)

Respondents who were aware of the “Spokes” website were asked whether they visit the site, with just under four in ten (37%) stating they had. This result is comparable with most previous waves, and is higher than Wave 3 (26%). Although the base size is small, the results indicatively suggest that females (60%) who are aware of the site are more likely to visit it than males (33%).

Chart 10: Visited “Spokes” website



Q15 - Do you visit the SPOKES website? (Base: Aware of Spokes)

Table 7: Awareness of “Spokes” by key demographics

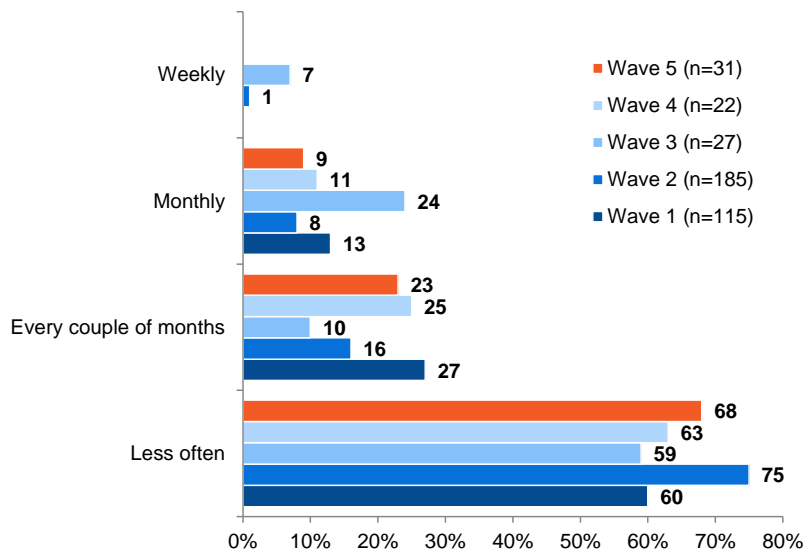
Q14 - Are you aware of the SPOKES website?	Total	Gender		Age			Location			Type of rider		
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%	%	%
Base: All respondents	250	225	25	28	95	127	135	90	25	129	202	68
Aware of Spokes	35	35	41	36	44	32	36	38	23	35	38	27

Table 8: Visited “Spokes” by key demographics

Q15 - Do you visit the SPOKES website?	Total	Gender		Age			Location			Type of rider		
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%	%	%
Base: All aware of the SPOKES website	90	79	11	9	39	42	49	35	6	49	79	17
Visited Spokes	37	33	60	19	37	39	36	38	41	43	37	21

Amongst those who visit the website, the majority (68%) visit less than once every two months. Around a quarter (23%) visit every couple of months and one in ten (9%) visit on a monthly basis. These results are in line with previous Waves.

Chart 11: Frequency of visiting the Spokes website

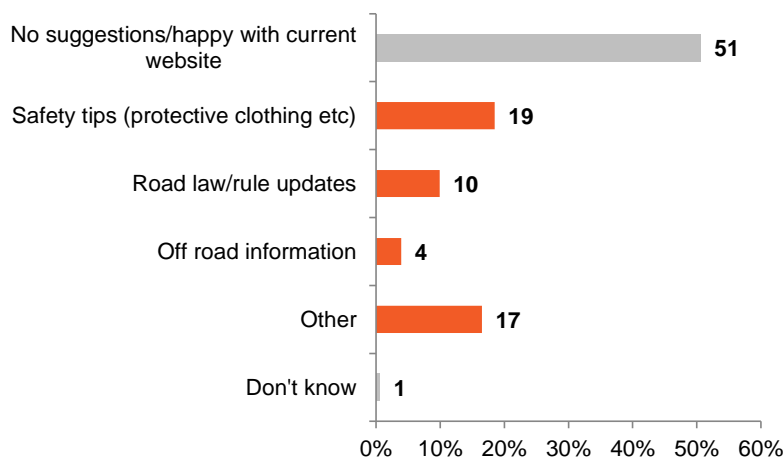


Q16 - About how often would you visit the SPOKES website? (Base: visited Spokes site)

The majority (77%) of those who had visited “Spokes” believed that the content was useful to them, a similar result to Wave 4 (76%). The base size is very small, and therefore there are no statistically significant differences between groups.

Around half of visitors (51%) were happy with the site as it is. Those who had any suggestions to make would like to see additional safety tips (19%), road rule updates (10%) or off-road specific information. One in six respondents (17%) made a variety of alternative comments. These included listings of local events, information relating to Motocross or other recreational riding and reviews of motorbikes.

Chart 12: What visitors to Spokes would like to see on the website

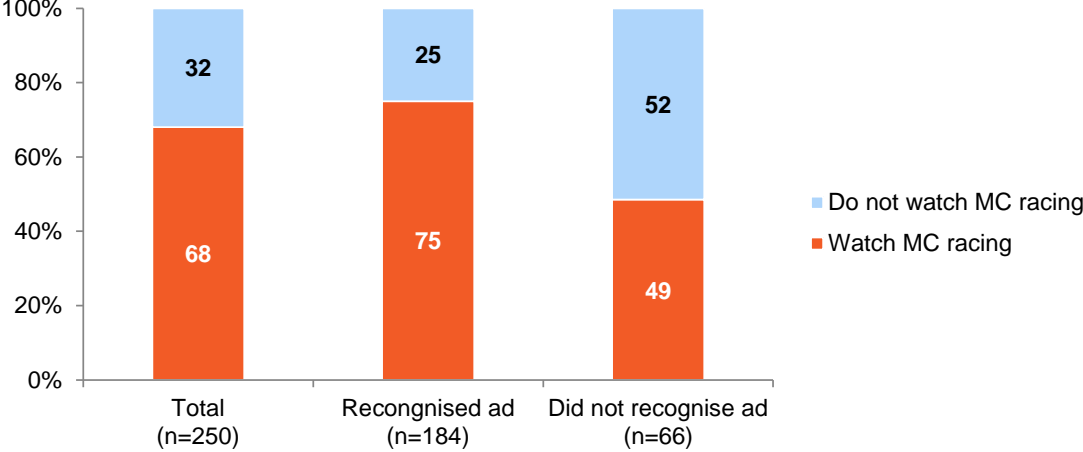


Q18 - What would you like to see on the SPOKES website? (Base: visited Spokes website, n=31)

Watching racing on TV

Respondents were asked whether they watched motorcycle racing on TV. Overall, seven in ten (68%) did. Those who recognised “The Ride” (75%) were more likely to watch motorcycle racing than those who did not recognise it (49%).

Chart 13: Watching motorcycle racing on television



Q19 - Do you watch motorcycle racing on TV?
(Base: All respondents)

3.3 ADVERTISING RECALL

In previous Waves only prompted recall was tested, that is respondents were read a description of the ad and asked whether they recalled having seen it. This Wave included a spontaneous recall measure.

Respondents were asked whether they had seen any road safety advertising on TV, billboards, in a newspaper, on the internet or in the mail. Overall nine in ten (89%) recalled seeing some road safety advertising. Those who did recall seeing something were asked to describe up to three ads they had seen, where they had seen it and what they thought the ad was trying to say. Following this, respondents were read a description of the current TAC Motorcycle Safety ad “The Ride”.

They were then asked whether they recalled seeing the ad described, and if so, how frequently they believed they had seen it and what they thought it was trying to say.

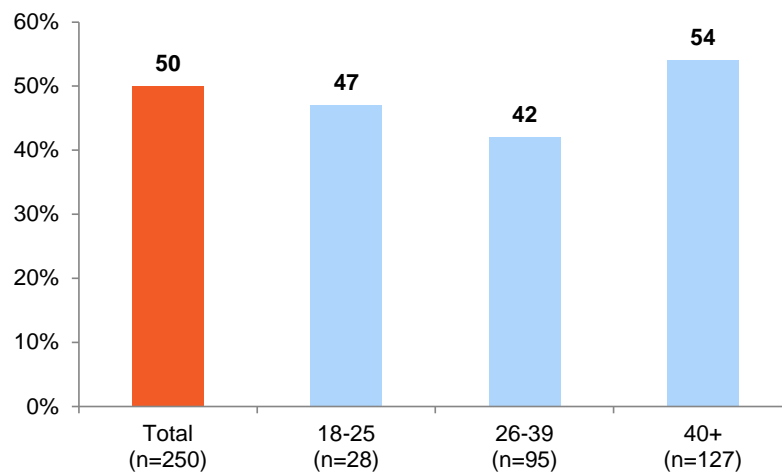
Spontaneous recall

Overall, half (50%) of respondents recalled “The Ride” spontaneously. This is a very strong result, with spontaneous recall usually being much lower than prompted recall.

Wallis has an ad database containing results for hundreds of ads from various industries including telecommunications, banking and finance, retail and insurance. Never has Wallis tested an ad with such high spontaneous recall. However, it should be kept in mind that the sample for this survey was motorcycle riders and hence they were likely to be more predisposed to recalling ‘The Ride’ than had they been members of the general population (who provided the sample for most of the other studies in Wallis’ database). Nevertheless, this is an excellent result.

Spontaneous recall was high across all groups, although it was highest amongst riders over the age of 40 (54%) and respondents living in rural Victoria (58%).

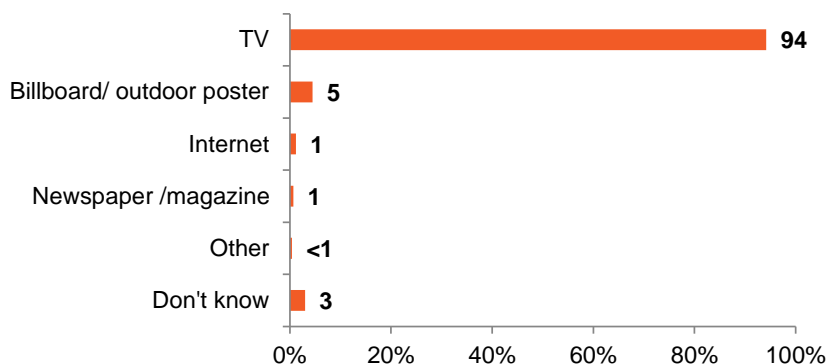
Chart 14: Spontaneous recall of “The Ride” amongst all respondents



AD1/AD2/AD3 - Spontaneous recall of ‘The Ride’ (Base: All respondents, n=250)

The vast majority (94%) of those who recalled the ad reported that they had seen it on television. This was true of all groups. One in twenty (5%) recalled seeing outdoor advertising and a small proportion (1%) reported seeing the ad on the Internet or in a newspaper.

Chart 15: Medium on which “The Ride” was seen by those who recalled it spontaneously



Where did you see that ad? (Base: All who spontaneously recalled “The Ride”, n=118)

Spontaneous message take-out

Respondent were asked what they thought the ad was trying to tell them. There were four messages that respondents predominately took out from the ad, these were:

- Wear protective clothing (26%);
- Slow down or don't speed (24%);
- Don't ride irresponsibly (23%);
- Riders of motorbikes and scooters need to be more careful than car drivers (23%).

This message takeout concurs by and large with the key campaign messages, although lane splitting was only specifically mentioned by a very small proportion (1%) of respondents.

Table 9: Spontaneous recall message take out

AD1/AD2/AD3 - Message of spontaneous recall of 'The Ride'	Total	Age			Location			Type of rider		
		18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%
Base: All who recalled 'The Ride'	118	11	39	68	60	47	11	55	99	32
Wear protective clothing	26	49	21	25	24	29	24	33	25	28
Slow down/don't speed	24	14	33	22	26	24	6	15	25	16
Don't ride like an idiot / be responsible	24	26	17	26	23	26	18	27	24	17
You need to be more careful when riding a motorcycle or scooter	23	33	22	23	20	30	15	21	20	32
Be more aware/alert of other road users	18		23	18	21	9	38	13	16	18
Be careful when overtaking	8		10	8	6	11	10	11	9	11
Car drivers looking out for motorcyclists	5		12	3	5	2	21	1	3	12
Chances of serious injury are much higher when riding a motorcycle/scooter	4		8	4	4	6		7	4	3
Stop lane splitting	1			2	2				1	
Don't know	8	11	5	9	9	6	12	8	10	6
Total responses	141	133	149	139	139	143	143	135	138	142

Green = significantly higher (to 80%) compared to at least one other group within the sub-group
 Bold green = significantly higher (to 90%) compared to at least one other group within the sub-group

As can be seen in Table 9, respondents aged between 26 and 39 years were the most likely to say the ads were saying to slow down (33%) or that it was saying that car drivers should look out for motorcyclists (12%).

Respondents who ride on-road for recreation (25%) were slightly more likely than others to take out a message relating to slowing down.

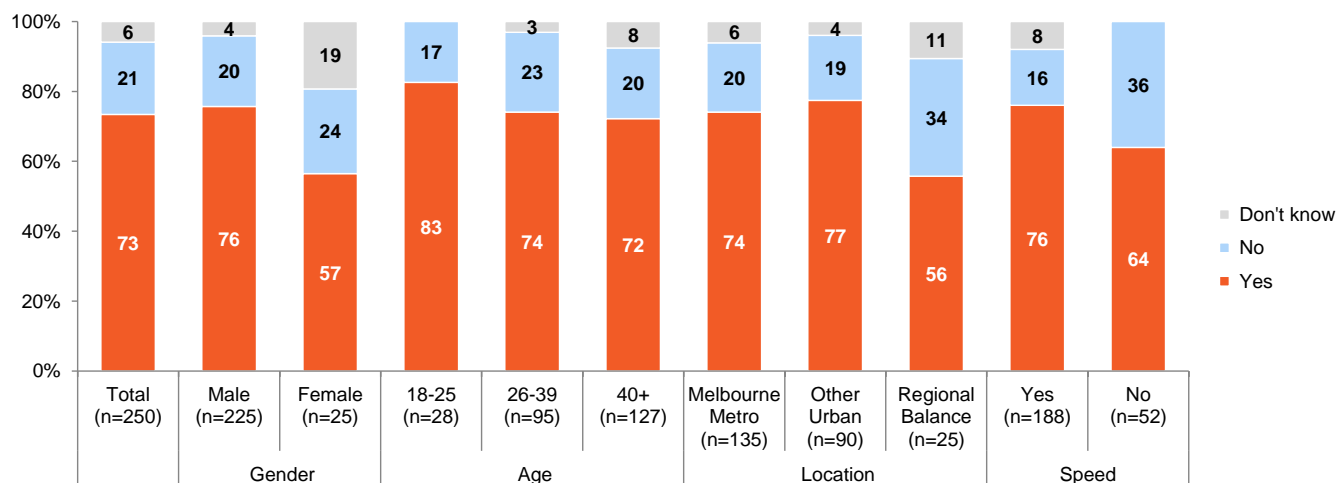
Prompted advertising recall

All respondents were read a brief description of the ad and asked whether they recalled seeing this ad. The description was as follows:

“In this commercial, we see a variety of different motorcycle riders in different traffic situations. The commercial ends with a crash scene”

Three-quarters (73%) recalled seeing the ad described. Awareness was consistent amongst most groups, and where there were apparent differences, these were not significant due to the small base size. Indicatively, the results suggest that awareness was high amongst those aged under 25 (83%) and lower amongst females (57%) and those living in ‘Regional Balance’ locations (56%).

Chart 16: Prompted recall of “The Ride” by gender, age and location



Q20 – I am now going to ask you some questions about a specific road safety commercial. In this commercial, we see a variety of different motorcycle riders in different traffic situations. The commercial ends with a crash scene. Can you remember seeing, hearing or reading about this commercial? (Base: All respondents, n=250)

Compared with prompted recall of the “Motorcycle Reconstruction” ad in Wave 4 (89%), recall of “The Ride” was significantly lower at seven in ten (73%). It is also worth noting that in Wave 4, lower recall was not observed amongst females or those living in ‘Regional Balance’ locations. However, as the base sizes are small in both measures, these results are not particularly reliable.

The Wave 4 study did not include spontaneous recall, which was high for “The Ride”, with half (50%) mentioning it without prompting. When prompted and spontaneous recall are combined, nearly nine in ten (86%) recalled “The Ride”. However, we would assume that had a similar measure been taken for “Motorcycle Reconstruction”, recall would have been higher than for “The Ride”.

While we do not have figures to assist in the analysis of the reason for the difference in levels of prompted recall for the two campaigns, possible causes, aside from the efficacy of the ads themselves, are:

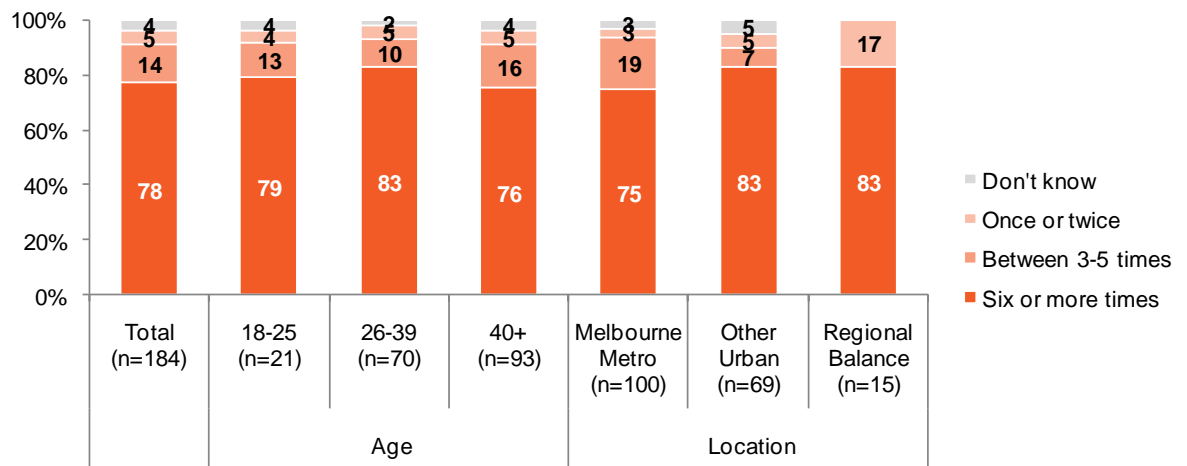
- A difference in media placement strategy – i.e. spend / placement;
- “The Ride” is an older campaign, compared to “Motorcycle Reconstruction” which was new and generated some dialogue in the media;
- Differing levels of below the line promotion of the campaigns; or
- Methodological differences relating to the effectiveness of the ad descriptions in prompting respondents to recall the campaigns.

Nonetheless, both campaigns had very high prompted recall amongst the target market, and in both cases message take out was broadly in line with the stated aims of the advertisements. There is no doubt that both campaigns were successful at reaching their target audience and communicating effectively.

How many times the ad was seen

Not only was recall of the ad very high, three-quarters (74%) of those who had seen the ad reported seeing it six or more times. Frequency of seeing the ad was similar for respondents of all characteristics. Chart 17 below shows that the frequency with which respondents reported seeing the ad increased throughout the course of the study, with nine in ten reporting having seen the ad six or more times by the fifth week of interviewing. This is interesting as the campaign was off air for the final three weeks of interviewing.

Chart 17: How many times the ad was seen



Q21 – *About how many times would you say you have seen, heard or read about this commercial?*
(Base: All who recalled ad with prompting, n=184)

Message take out – prompted recall

Respondents who recalled the ad when prompted had considerably different message take out to those who recalled the ad spontaneously. One of the key message take outs from those who mentioned the ad spontaneously related to wearing protective clothing (26%), however when the ad was recalled through prompting only one in fourteen (7%) mentioned protective clothing. Even bearing in mind that when prompted, respondents were only asked for the single main message, and respondents who recalled the ad spontaneously were able to mention multiple messages, this is still a significant reduction in mentions.

Those who recalled the ad with prompting tended to mention more generic messages, such as:

- Don't ride irresponsibly (38%);
- Slow down, don't speed (19%); and,
- Be more alert (17%).

Despite this, the message take out does appear to reflect the shift in message between 2012 and 2013 campaigns. Compared to Wave 4 and the testing of "Motorcycle Reconstruction" there was a significant reduction in mentions of "slow down, don't speed" (58% in Wave 4 vs 19% in Wave 5). There was also a corresponding increase in mentions of "don't ride irresponsibly" (3% in Wave 4 vs 38% in Wave 5).

Table 10: Prompted recall message take out

Q22 - What do you think was the main message of this commercial? (Single response)	Total	Age			Location			Type of rider		
		18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
	%	%	%	%	%	%	%	%	%	%
Base: All who recalled ad with prompting	184	21	70	93	100	69	15	95	156	48
Don't ride like an idiot / be responsible	38	37	33	40	39	40	23	45	40	31
Slow down / don't speed	19	21	22	18	19	18	28	14	19	27
Be more aware/alert	17	23	11	18	13	21	33	11	16	15
Wear protective clothing	7	17	7	6	11	1		10	6	6
You need to be more careful when riding a motorcycle or scooter	7	2	8	7	7	9		7	7	9
Riding a motorcycle/scooter is dangerous	4		8	3	4	6		4	3	4
Ride to the conditions	3		3	4	2	4	8	3	4	2
Chances of serious injury are much higher when riding a motorcycle/scooter	3		3	3	3	1	8	4	2	3
Other	1		4		1	2			1	3
Don't know	1		3		2			2	1	
Total responses	100	100	100	100	100	100	100	100	100	100

Diagnosics

In order to assess whether the ad resonated with riders, and prompted discussion with others, respondents were asked whether:

- They talked about the ad with family and friends
- The ad is for people like yourself

This is the same diagnostic approach that has been used in previous waves.

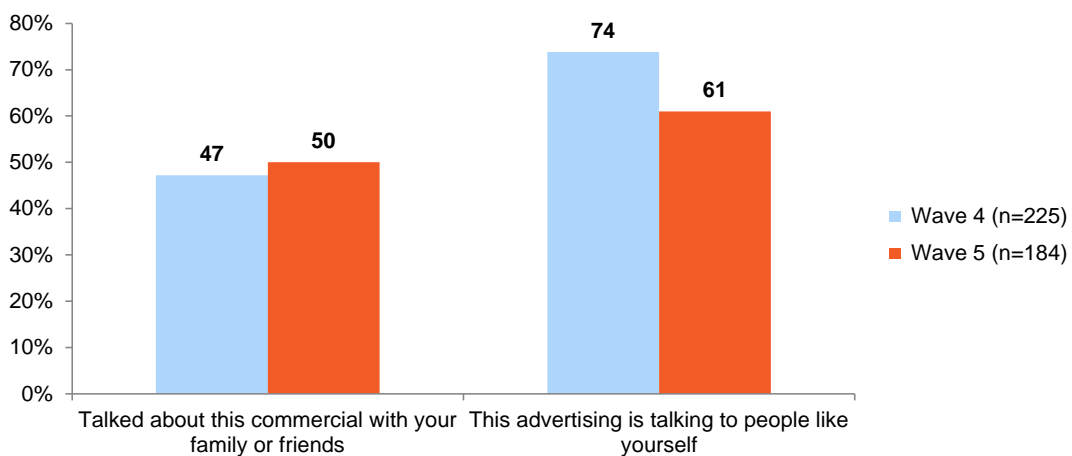
Half (50%) of those who had seen the ad report discussing it with friends and family, a similar result to that recorded in Wave 4 (47%). It is worth noting that:

- Those who recalled the campaign spontaneously (59%) were more likely to have discussed the ad with friends and family than those who had only recalled the campaign on prompting (41%).
- Although the result was not significant this wave, a greater proportion of females (70%) discussed the ad with friends and family than did males (48%). This echoes the significant finding in Wave 4 (72% of females vs 44% of males).

When asked whether the ad was talking to people like themselves, six in ten (61%) believed it was, down from three quarters (74%) in Wave 4. The difference in results could reflect the extent riders relate to the different main messages of the Wave 4 (speed) and Wave 5 campaigns (unsafe riding practices and protective clothing). It could suggest that while the majority of riders speed at least some of the time (the key message in Wave 4); it may be the case that a smaller proportion believe they ride in an unsafe manner or do not wear adequately protective clothing (the key message in Wave 5).

The group who identified most strongly with the campaign was 26 to 39 year olds (72%).

Chart 18: Attitudes towards “The Ride”



Q23 - Have you talked about this commercial with your family or friends? / Q24 - Do you think this advertising is talking to people like yourself? (Base: All who recalled the ad with prompting, n=184)

Respondents were asked why they either believe the ad speaks to people like themselves or why it doesn't. The following chart provides a thematic breakdown of the reasons why respondents identified with the "The Ride". Predominately respondents feel that it communicates to all riders (40%) and raises awareness of what could happen when riding a motorbike (24%). Reasons for NOT identifying with the ad were that respondents felt they were already safe and law abiding riders or that the ad was aimed at young or less experienced riders (51% and 18% respectively of those who did *not* identify with it).

Chart 19: Why riders identify with "The Ride"

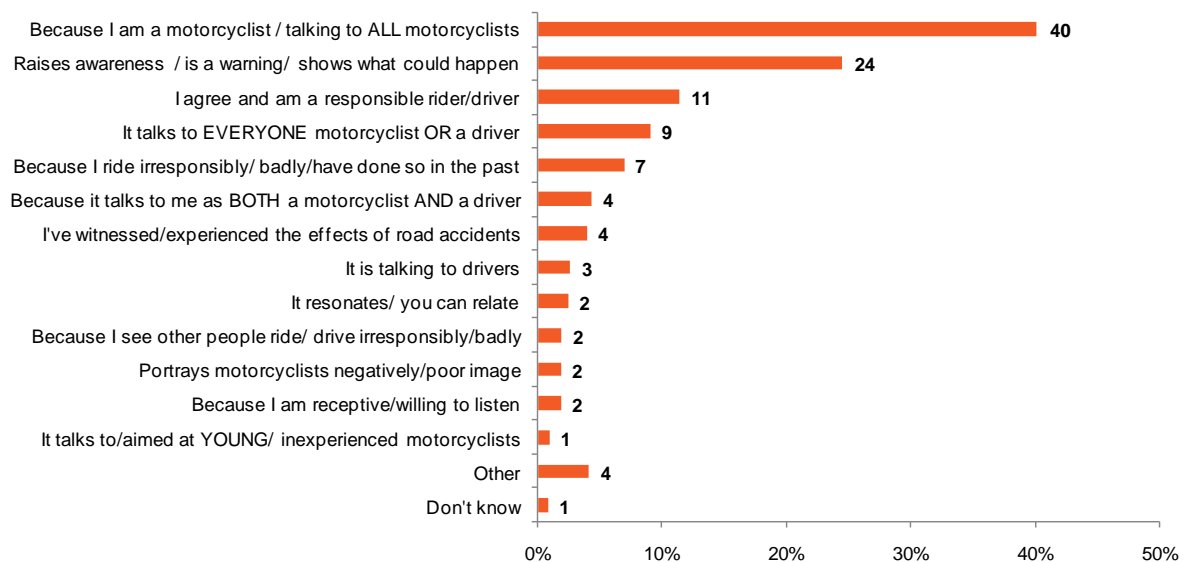
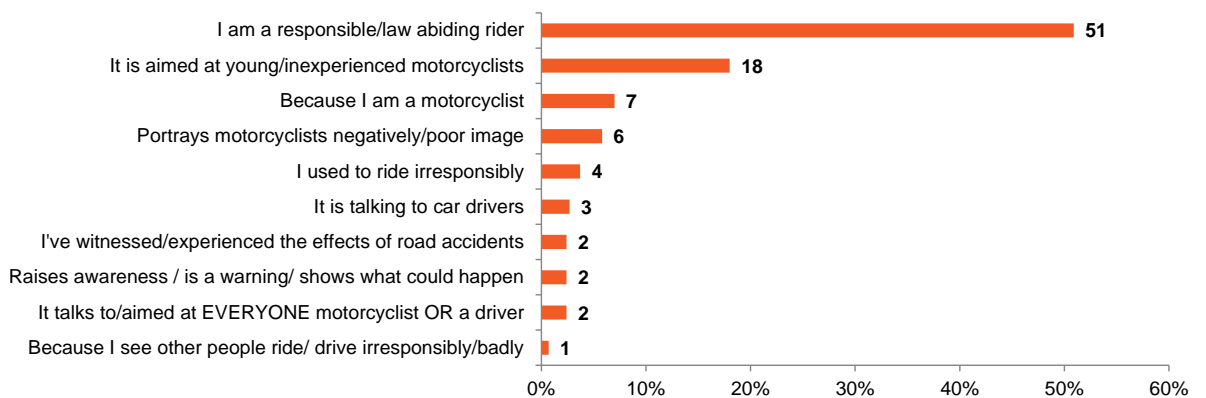


Chart 20: Why riders do not identify with "The Ride"



Q25 - Why do you say that? (Base: All who remember the commercial and identify with the ad, n=116)

This wave a series of diagnostic questions were asked of respondents to assess the effectiveness of the ad on various dimensions on a 0 to 10 point scale. These determined the extent to which respondents thought the ad:

- Was attention grabbing;
- Said some important things;
- Was different from other public safety ads;
- Said something that is believable;
- Made them feel more positive about the organisation sponsoring the ad; and,
- Made them feel more likely find out more about this issue.

Table 11 indicates the ad was particularly effective in terms of being ‘attention grabbing’, ‘on being believable’ and on ‘saying important things’.

The fact that this ad is perceived as ‘attention getting’ indicates a key reason why spontaneous recall was a very high (50%).

The fact that the ad is perceived as ‘saying important things’ and ‘being believable’ are most likely important factors for the evidence presented elsewhere in this report that this ad has had an impact on attitudes. Analysis of the Wallis ad database suggests that typically ads that perform well on these two diagnostics have success in shifting peoples’ attitudes.

Table 11: Advertising diagnostics

Q25b - Diagnostic - How would you rate the ad out of 10?	Total	Age			Type of rider		
		18-25	26-39	40+	Commuter	On-Road	Off-road
	%	%	%	%	%	%	%
Base: All who remember the commercial	184	21	70	93	95	156	48
Attention grabbing	8.2	8.3	7.8	8.3	8.0	8.1	8.4
Saying some important things	7.7	8.2	7.0	8.0	7.5	7.5	8.2
Different from other ads	6.8	6.2	6.0	7.2	6.5	6.7	7.0
Saying something that is believable	8.1	9.1	7.4	8.3	8.0	7.9	8.8
Making you feel more positive about the organisation sponsoring the ad	6.4	7.4	5.7	6.6	5.8	6.1	7.1
Making you feel more likely find out more about this issue	4.8	5.9	4.3	4.9	4.5	4.6	5.5

Green = significantly higher (to 80%) compared to at least one other group within the sub-group
Bold green = significantly higher (to 90%) compared to at least one other group within the sub-group

The following diagrams on the next page indicate that on the whole the diagnostics were strongest amongst those aged 18-25 and those aged over 40, and those who ride ‘off road’. Typically we find that diagnostic scores are highest amongst the youngest age group, probably because they are more impressionable. It is interesting that the diagnostic scores are high amongst those aged over 40. It is possible that with experience, awareness of the need to be careful when motorcycle riding increases, and consequently, those aged over 40 are more receptive to ‘The Ride’s’ messages.

Chart 21: Advertising diagnostics by age

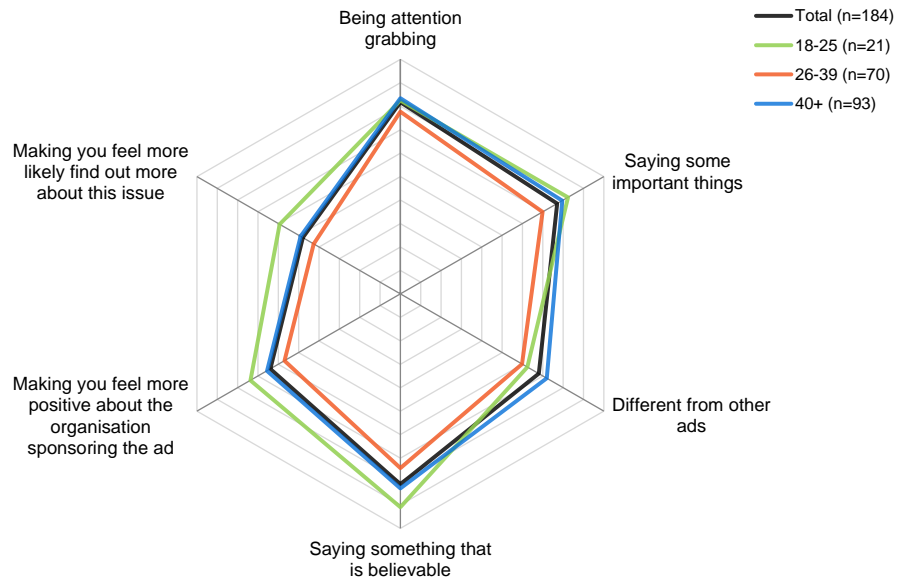
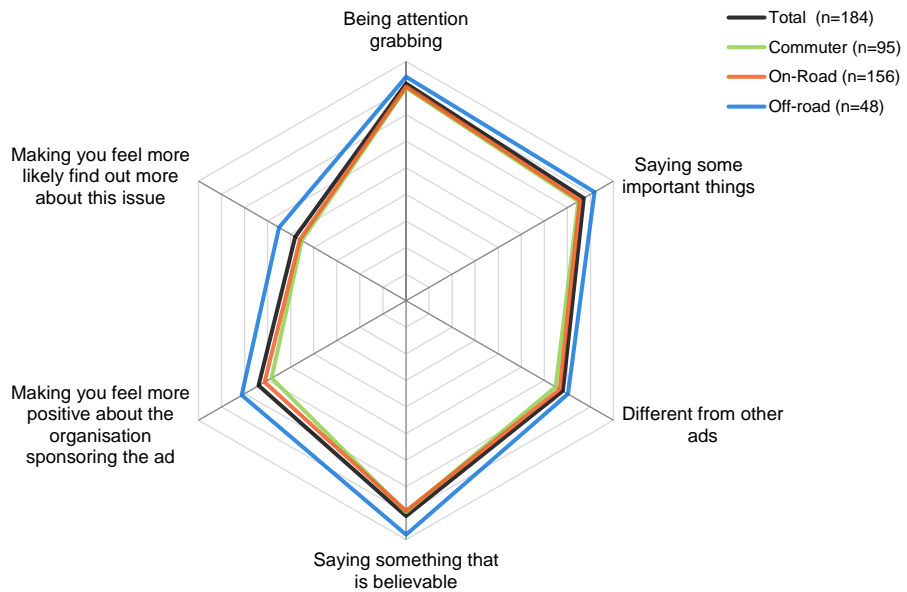


Chart 22: Advertising diagnostics by type of riding

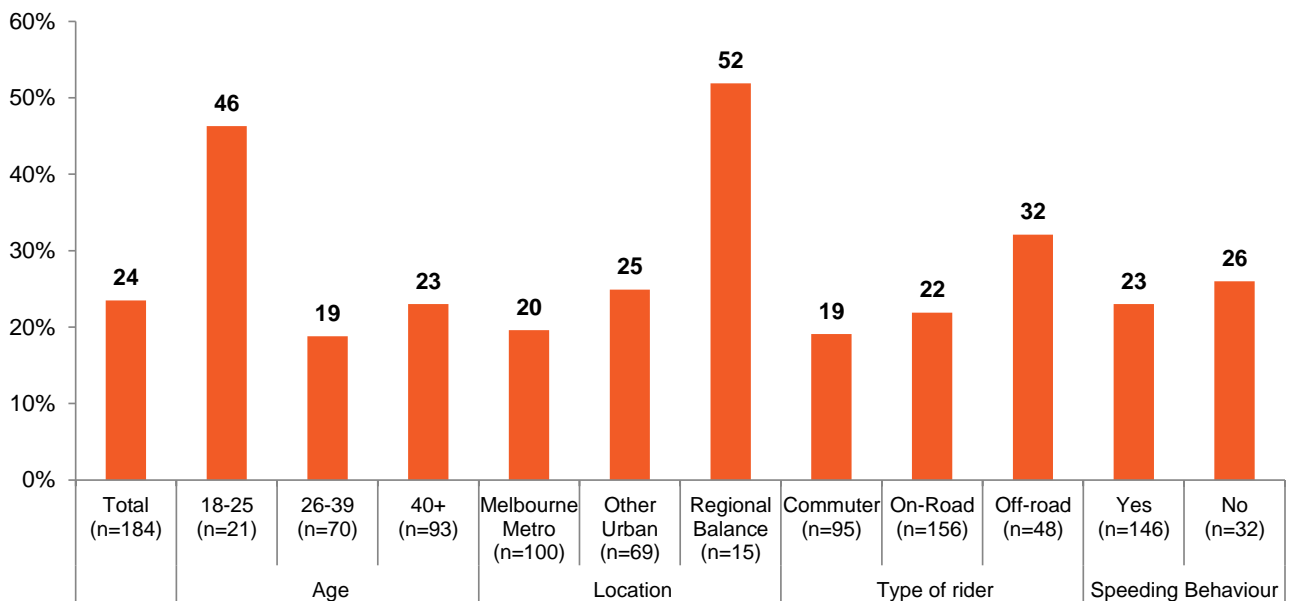


Behaviour change

A key measure of the effectiveness of the ad is whether riders modify their behaviour as a result of seeing an ad. Overall a quarter (24%) of those who recalled the ad reported that they had changed their behaviour. This was the same result as recorded for the “Motorcycle Reconstruction” ad in Wave 4 (24%).

- Those who ride off road (32%) were slightly more likely than other types of riders to report a change in behaviour.
- Indicatively, it appears that young riders, aged 18-25 (46%) and riders who live in ‘Regional Balance’ locations (52%) were the most likely to change their behaviour as a result of seeing the ad.

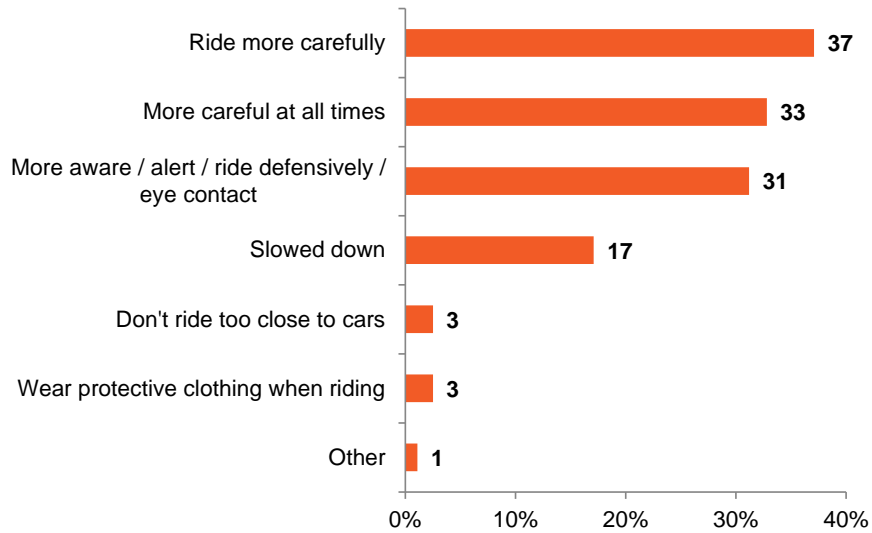
Chart 23: Changed behaviour as a result of seeing the ad



Q26 - As a result of seeing, hearing or reading about this advertising, have you changed your behaviour in any way? (Base: All who recalled ad with prompting, n=184)

Those who changed their behaviour were most likely to; “ride more carefully” (37%), “be more careful at ALL times” (33%), and be “more alert, ride defensively and make eye contact” (31%). One in six (17%) reported that they had slowed down. A small proportion said they “do not ride too close to cars” (3%) or “wear (more) protective clothing” (3%).

Chart 24: How behaviour changed as a result of seeing the ad



Q27 – In what ways did you change your behaviour? (Base: All who changed their behaviour as a result of seeing the ad, n=45)

Multiple responses allowed

3.4 MOTORCYCLISTS' ATTITUDES AND BEHAVIOURS

Motorcyclists were asked a number of questions relating to their riding attitudes, behaviour and experiences **as motorcyclists**. These were mostly used for analytical purposes, however they have been reported over time and are outlined here under the following sub-headings

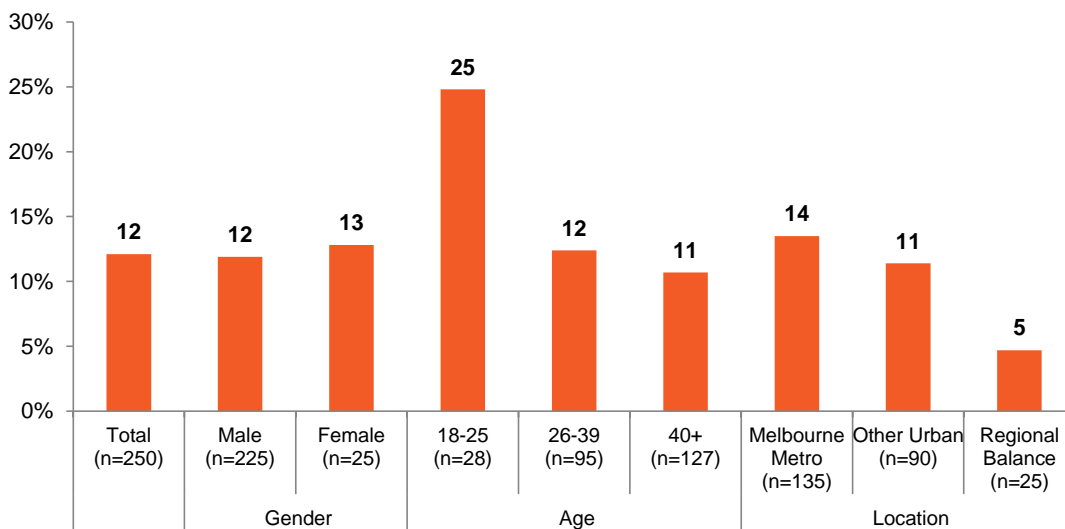
- Motorcyclists' riding experiences
- Speeding and other riding behaviours
- Riding under the influence of alcohol or drugs
- Attitudes to road safety

Motorcyclists' experiences

A section of the questionnaire deals with encounters with law enforcement, specifically respondents are asked whether they have been pulled over by police while riding in the past three months, how frequently this had occurred and the reason for being pulled over.

Overall **one in eight (12%) respondents reported that they had been pulled over** on their motorcycle in the past three months. This is similar to previous results (Wave 4 – 8%, Wave 3 – 7% and Wave 1 – 11%). There were no characteristics of respondents that indicated an increased likelihood of being pulled over, although indicatively 18-25 years were more likely to have been pulled over (this result was not significant). There were some differences over the course of interviewing. As interviewing progressed, respondents were decreasingly likely to report being pulled over.

Chart 25: Pulled over by police in past three months

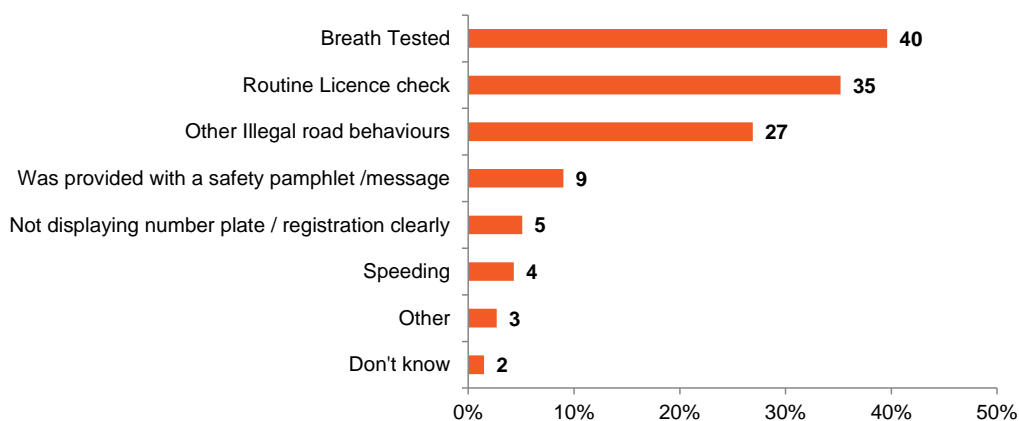


Q28 - Have you been pulled over by police for any reason while riding your motorcycle in the last three months? (Base: All respondents, n=250)

When asked how frequently they were pulled over, seven in ten (70%) of those who had been pulled over said just once, one in six (17%) were pulled over twice and one in seven (14%) were pulled over three or more times.

The reasons for being pulled over are shown in Chart 26. The most common reason is to be breath-tested (40%), while a similar proportion were pulled over for a licence check (36%). Around a quarter (27%) were pulled over for other illegal riding behaviours, and one in ten (9%) was provided with a safety message. Other reasons included number plate/registration issues (5%) and speeding (4%).

Chart 26: Reason for being pulled over



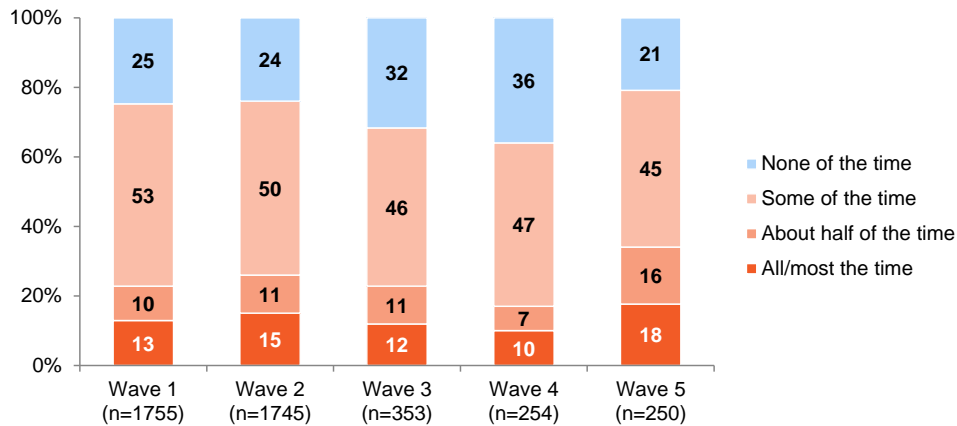
Q30 - Why were you pulled over? (Base: All who have been pulled over, n=30)

Speeding and other behaviours

Generally all the measures made show more similarity to Wave 3 than to Wave 4 – which displayed greatly improved behaviour and attitudes. The consistency with which Wave 5 results agree with all other waves except Wave 4 leads us to question the results last time.

Self-reported speeding behaviour has returned to levels recorded in Wave 2 with over one in six motorcyclists (18%) claiming that they speed most or all of the time. One in five (21%) motorcyclists claimed never to speed.

Chart 27: How often speed limit is exceeded by Wave

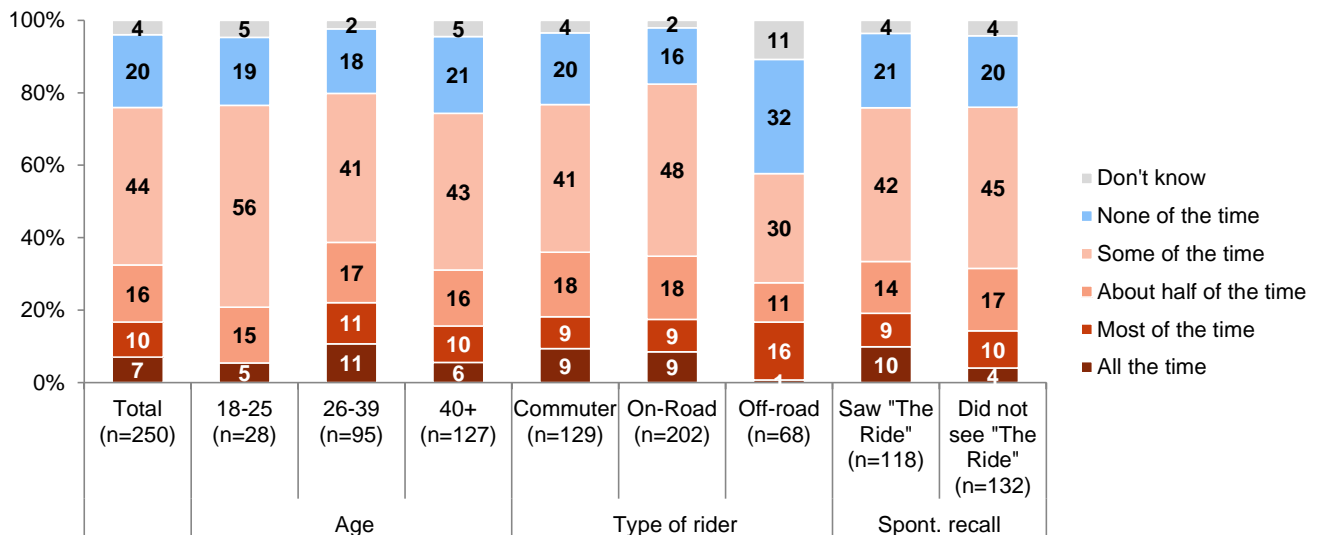


Q31 - When riding on the road, how often would you exceed the speed limit, even if only by a few kilometres per hour? (Base: All respondents)

The following chart shows that the group most likely to self-report speeding are motorcyclists aged 26-39, amongst whom one in five (22%) self-report speeding most, or all, of the time. On the other hand, a slightly higher proportion (21%) said that they never exceeded the speed limit.

Interestingly, those who spontaneously recalled the ad were more likely to speed 'all the time' (10% vs 4% amongst non-recallers).

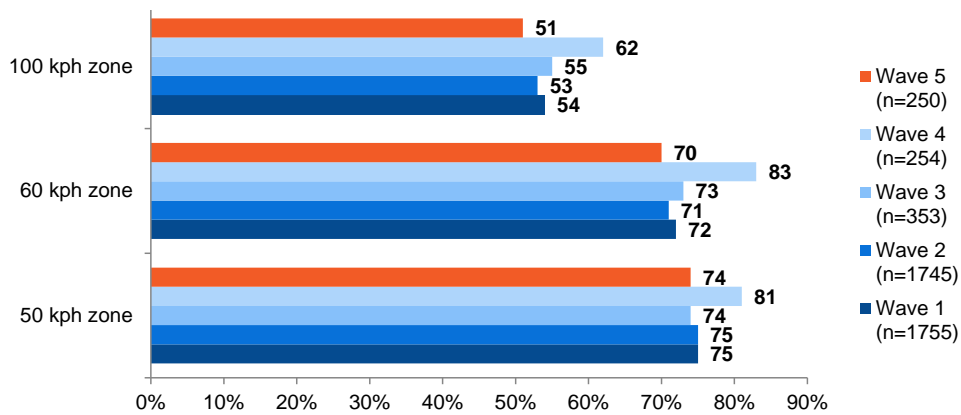
Chart 28: How often speed limit is exceeded



Q31 - When riding on the road, how often would you exceed the speed limit, even if only by a few kilometres per hour? (Base: All respondents, n=250)

As has been seen in the past, as the speed limit increases, so the proportion of motorcyclists who self-report speeding increases too. Over time, with the exception of Wave 4, three-quarters of motorcyclists say they stick to the limits in a 50 kph zone, seven in ten in a 60 kph zone and only half at 100 kph. Speed limits are more likely to be adhered to by motorcyclists who live outside Melbourne.

Chart 29: Drive at or below the limit

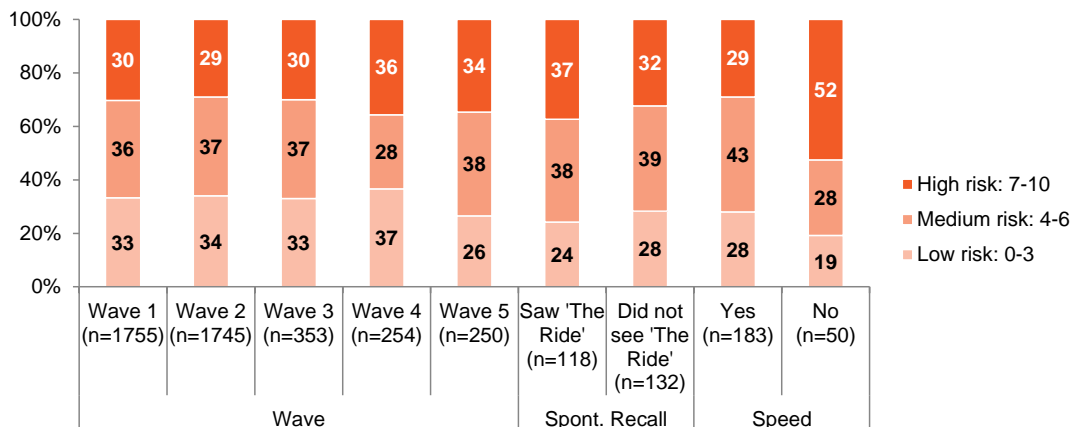


Q32– What speed do you normally ride at one the road in a 50/60/100 kph zone? (Base: All respondents, n=250)

It has long been held that speeding behaviour can be tempered by the threat of being caught. A minority of motorcyclists (33%) agree with the statement that they will ride over the speed limit if they are sure they won't get caught, suggesting that this threat alone is not a deterrent to speeding, given the proportion of riders who admit to speeding.

The following chart shows that there has been a shift in the proportion of riders who consider their risk of being caught if speeding in the next week to be very low. Those who never speed (52%) are more likely to believe there is a high risk than those who speed at least some of the time (29%).

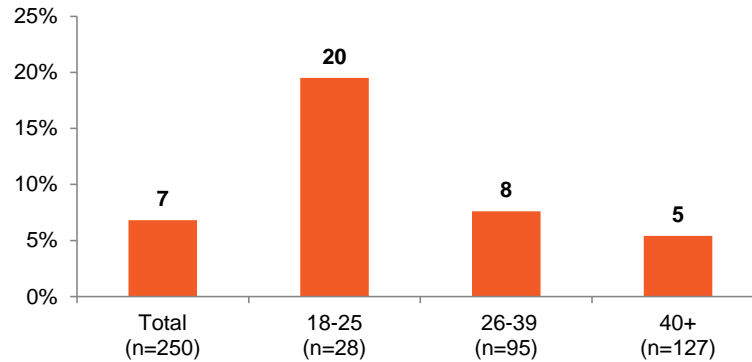
Chart 30: Risk of being caught speeding



Q34 – If you were to speed while riding in the next week, how certain are you that you would be caught? (Base: All respondents, n=250)

When riders were asked if they had been caught speeding in the last two years, only 7% said that they had, demonstrating that the risks of being caught are, in fact, very low. While the number of motorcyclists interviewed was too small to draw a definitive conclusion, the likelihood of being caught appears much higher for motorcyclists aged between 18 and 25.

Chart 31: Caught speeding in the past two years

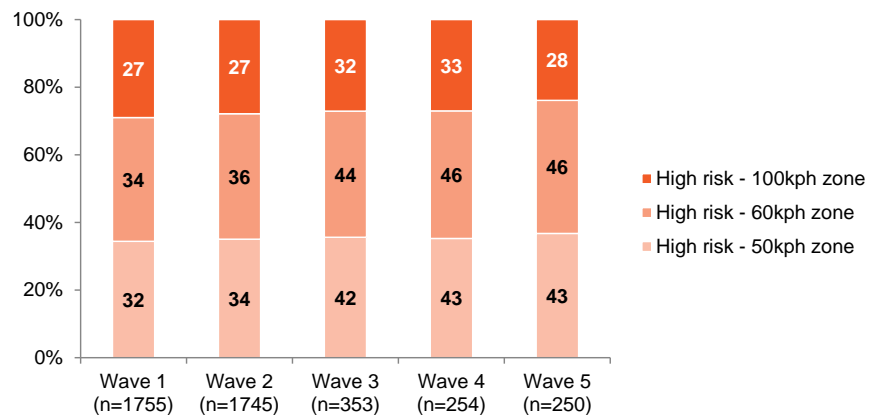


Q36 - Have you been caught speeding on your motorcycle in the last 2 years?
 (Base: All respondents)

Riders were also asked to assess their risks of having an accident if they were to speed by up to 10km over the limit in 50 kph, 60 kph and 100 kph zones.

The following chart shows that the perceived risk is higher in 50 and 60kph zones than in 100 kph zones.

Chart 32: High Risk of an Accident



Q35a/b/c—Using a scale of 0 to 10 where 0 means that the risk is very low and 10 means the risk is very high, how do you rate the risk of having an accident if you were to speed in the next week by up to 10 kms over the limit in a (50/60/100 kph) speed zone? (Base: All respondents, n=250)

Those who spontaneously recalled ‘The Ride’ were significantly more likely than ‘non-recallers’ to consider their risk of accident to be high if they were to speed in 50 and 60 kph zones. Along with the fact that ‘slow down/ don’t speed’ was perceived to be one of the main messages of this ad (see Table 1), this provides some evidence that

‘The Ride’ was successful in shaping peoples’ attitudes towards the danger of speeding.

Table 12: High risk of being caught speeding by key characteristics

Q35a/b/c - Speeding by up to 10k's over the limit in X speed zone - Risk rating	Total	Gender		Age			Location			Spont. Recall	
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Saw 'The Ride'	Did not see 'The Ride'
Base: All respondents	250	225	25	28	95	127	135	90	25	118	132
50kph zone	43	41	54	32	38	46	43	44	39	27	35
60kph zone	46	44	57	32	42	48	43	52	40	54	37
100kph zone	28	26	45	27	27	29	26	33	23	30	25

Green = significantly higher (to 80%) compared to at least one other group within the sub-group

***Bold green** = significantly higher (to 90%) compared to at least one other group within the sub-group*

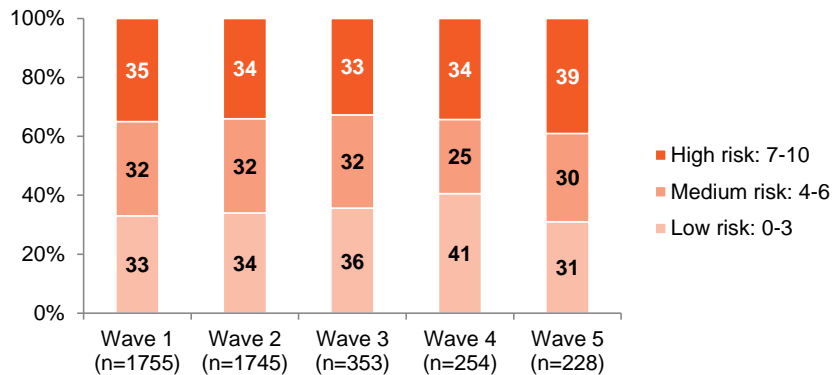
3.5 RIDING UNDER THE INFLUENCE OF ALCOHOL OR DRUGS

A major cause of injury on the roads is driving or riding while under the influence of alcohol or drugs. The questionnaire covered riders' perceptions of the risks of drink or drug riding, both of being caught by police and of having an accident. It also covered riders experience and behaviour in relation to being breath or drug tested and riding while over 0.05 BAC.

Respondents were first asked what they believed their risk of being caught **drink** riding was over the next week, if they were to do so. Four in ten (39%) thought they had a high risk of being caught, while three in ten (30%) believed the risk was moderate. A further three in ten (31%) believed the risk to be low, significantly lower than that recorded in Wave 4.

- Respondents who recognised the ad (42%) were more likely to believe they would have a high risk of being caught for drink-riding than those who didn't (30%).

Chart 33: Perceived risk of being caught by police while drink riding



Q38 – Using a scale of 0 to 10 where '0' means that you think there is no chance at all of something like that happening, and '10' means that you think it is certain that it will happen... If you were to drink-ride in the next week, how certain are you that the police would detect you?
 (Base: All respondents – excluding don't know)

Table 13: Perceived risk of being caught by police while drink riding by key demographics

Q38 - If you were to drink-ride in the next week, how certain are you that the police would detect you? - Risk rating	Total	Gender		Age			Location			Type of rider		
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%	%	%
Base: All respondents	250	225	25	28	95	127	135	90	25	129	202	68
Low risk: 0-3	29	27	39	30	33	27	30	27	29	31	30	30
Medium risk: 4-6	27	26	31	33	26	27	25	28	35	24	26	32
High risk: 7-10	36	37	26	38	29	38	36	36	30	33	35	36

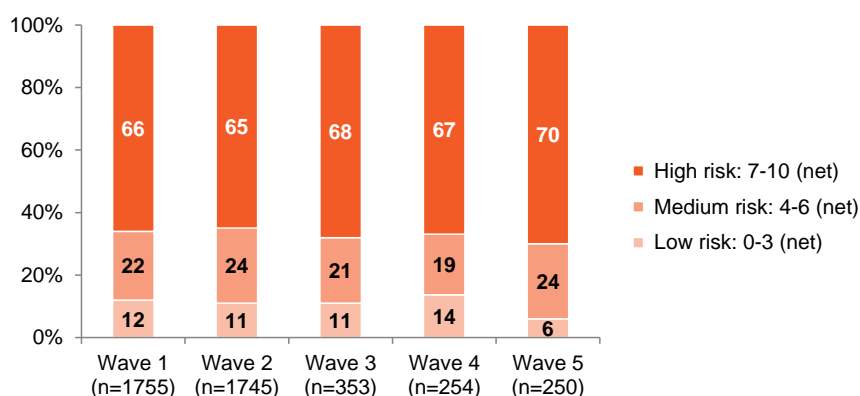
Table 14: Perceived risk of having an accident while drink riding by key demographics

Q39 - Having an accident if you ride even a short distance when you think you are marginally over the .05 blood alcohol limit - Risk rating	Total	Gender		Age			Location			Type of rider		
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%	%	%
Base: All respondents	250	225	25	28	95	127	135	90	25	129	202	68
Low risk: 0-3	6	6	5	5	4	7	5	7	11	5	6	5
Medium risk: 4-6	23	22	31	13	21	24	22	24	24	27	24	18
High risk: 7-10	68	69	60	77	71	66	69	68	64	64	66	76

When asked to rate their perceived risk of having an accident if drink-riding, seven in ten (70%) believe there was a high risk and around a quarter (24%) thought there was a moderate risk, as illustrated in Chart 34. These results are similar to the previous waves. One in twenty (6%) thought the risk would be low, a significant reduction since Wave 4 (14%).

- Respondents who did not recognise the ad (12%) were more likely to feel that they were at low risk of having an accident compared to those who had seen the ad (4%).

Chart 34: Perceived risk of having an accident while drink riding



Q39 – Using a scale of 0 to 10 where ‘0’ means that you think the risk is very low and ‘10’ means you think the risk is very high. How do you rate the risk of having an accident if you ride even a short distance when you think you are marginally over the .05 blood alcohol limit? (Base: All respondents)

As well as asking respondents to assess their risk, they were also asked how frequently they had seen police enforcing drink-riding while they were riding their motorcycle in the past three months. Chart 35 shows the proportion who saw police at least once for each wave of tracking, while Table 15 over the page provides a more detailed breakdown of the results.

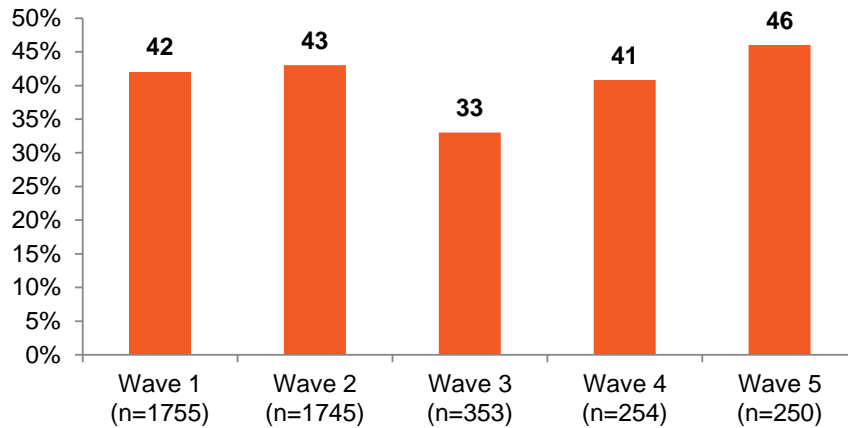
Nearly half (46%) of those surveyed reported having seen police at least once, a similar result to Wave 4. Those who had seen police breath testing tended to see them multiple times, with one in seven (14%) saying they had seen them once versus three in ten (32%) seeing them two or more times.

It is worth noting that half (50%) of respondents interviewed in week 1 reported seeing police enforcing drink riding “two or more times”, significantly higher than all other weeks (which ranged from 24% to 30%).

Table 15: Seen police enforcing drink riding at least once while riding in the past three months by key demographics

Q40 - How many times have you seen police doing drink drive/ride enforcement while riding in the last 3 months?	Total	Gender		Age			Location			Type of rider		
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%	%	%
Base: All respondents	250	225	25	28	95	127	135	90	25	129	202	68
Never	53	51	63	46	57	52	50	56	63	48	52	62
Once	14	15	9	20	6	17	14	16	5	17	16	8
Two or more times	32	32	29	34	36	30	35	25	33	35	31	26
Don't know/can't remember	2	2	-	-	2	2	2	2	-	-	1	3

Chart 35: Seen police enforcing drink riding at least once while riding in the past three months

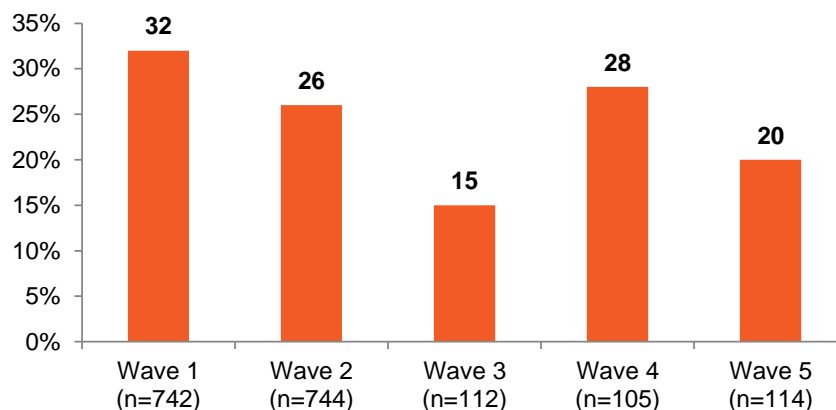


Q40 - How many times have you seen police doing drink drive/ride enforcement while riding in the last 3 months? (Base: All respondents)

Where respondents had seen police enforcing drink riding, they were also asked whether they had been breath tested. One in five (20%) had been tested - of these, one in six (16%) reported they had been tested once, and one in twenty (5%) were breath tested two or more times. Considering the overall rider population, this result translates into one in ten (9%) being tested in the previous three months.

Although the result appears lower than Wave 4, it is not a significant difference. This is also a measure that shows considerable variation across Waves, including those with much larger sample sizes. The results are likely to be dependent on the time on year the measure is taken and the level of police activity at that time.

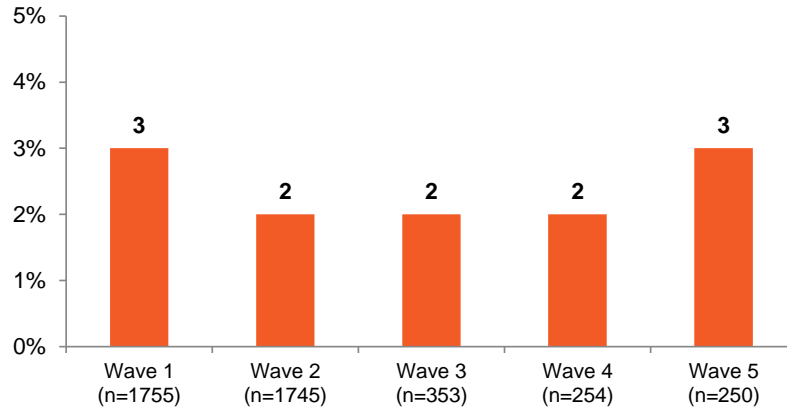
Chart 36: Breath tested in the past three months



Q41 - How many times have you been breath tested in the last 3 months while riding a motorcycle? (Base: All seen police drink drive/ride enforcement in the last 3 months)

Respondents were asked whether they had ridden a motorcycle in the past three months while near or over 0.05 BAC. A very small proportion (3%) indicated that they had done so. This is a similar result to all previous waves.

Chart 37: Ridden a motorcycle near or over 0.05 BAC in the past three months



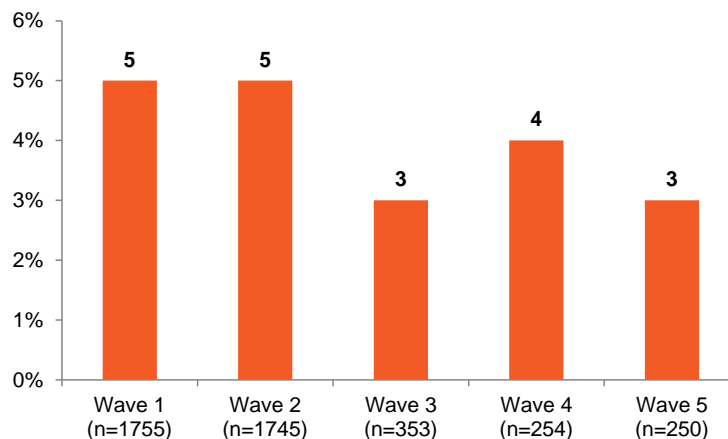
Q42 - Have you ridden a motorcycle over the last 3 months when you were near or think you may have been over .05? (Base: All respondents)

In addition to questions relating to drink-riding, respondents were asked a series of questions relating to their attitudes and behaviour concerning **drug riding**. These questions covered drug taking behaviour, both in general and while riding, perceived risk of having an accident while riding under the influence of drugs and attitudes towards enforcement priorities.

When asked whether they had taken illegal drugs in the past six months, only a small proportion (3%) stated they had. Those reported using illegal drugs were mostly aged 26-39 years (6%), with a small proportion (2%) aged over 40 years and none aged younger than 26.

Those who had used illegal drugs (n=8) were asked whether they had ridden under the influence of them in the past six months, none reported doing so.

Chart 38: Taken illegal drugs in the past six months



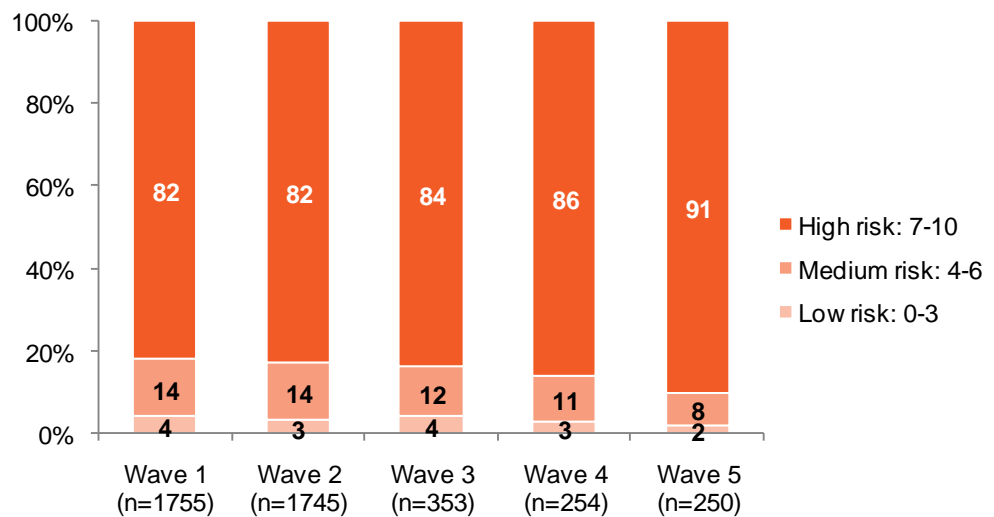
Q43 - Have you used any illegal drugs in the last six months? (Base: All respondents)

All respondents were asked to estimate what they believed the level of risk of having an accident would be if they rode a motorbike while under the influence of illegal drugs. The results are shown in Chart 39.

The vast majority (91%) believes they would be at high risk, a slightly higher result than recorded in previous waves. It is worth noting that a greater proportion believes they would be at high risk of an accident after riding on drugs versus drink-riding (70%). One in twelve (7%) believes they would be at medium risk of having an accident and very few (2%) that the risk would be low.

- Respondents who recalled “The Ride” spontaneously (94%) were more likely than those who didn’t (87%) to believe they would be at high risk.

Chart 39: Risk of having an accident if riding under after taking illegal drugs



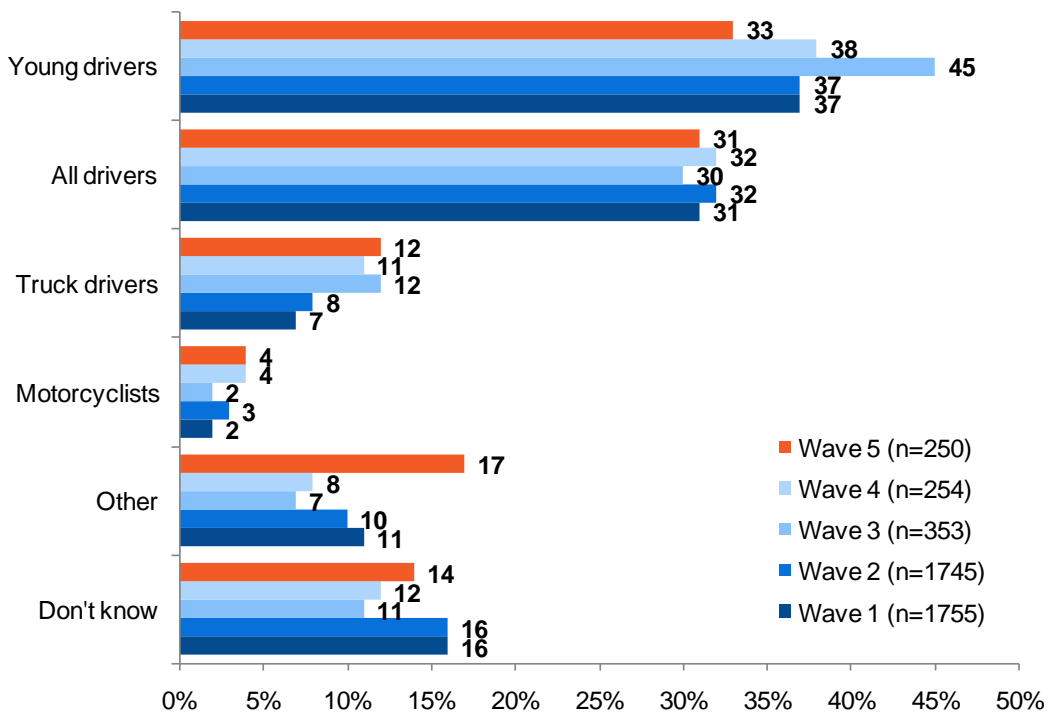
Q46 - Having an accident if you ride after using illegal drugs - Risk rating

Table 16: Risk of having an accident if riding after taking illegal drugs by key demographics

Q46 - Having an accident if you ride after using illegal drugs - Risk rating	Total	Gender		Age			Location			Type of rider		
		Male	Female	18-25	26-39	40+	Melbourne Metro	Other Urban	Regional Balance	Commuter	On-Road	Off-road
		%	%	%	%	%	%	%	%	%	%	%
Base: All respondents	250	225	25	28	95	127	135	90	25	129	202	68
Low risk: 0-3	2	2	-	-	1	2	2	2	-	2	2	2
Medium risk: 4-6	7	8	1	12	10	6	9	5	2	8	8	4
High risk: 7-10	84	82	93	88	87	82	84	85	76	80	83	93

Where respondents had a specific belief that the police target a group of drivers, they tend to believe they target young drivers (33%), although a similar proportion believes they target all drivers (31%). A sizable minority (12%) believes that truck drivers are the main targets, while only around one in twenty (4%) said they thought the police target motorcycle riders specifically.

Chart 40: Perceptions of drivers targeted by police for illegal drug use



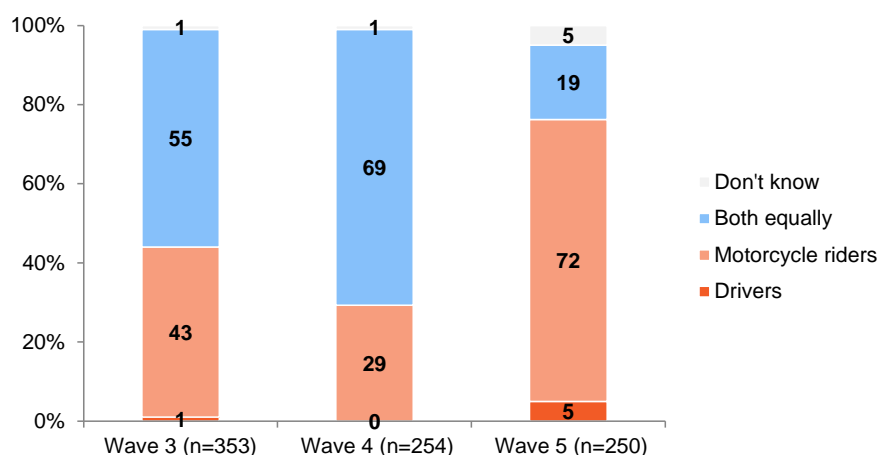
Q45 - Which drivers do you believe the police are targeting for illegal drugs?
 (Base: All respondents)

3.6 ATTITUDES TO ROAD SAFETY

At the end of the survey, motorcyclists were asked a number of questions relating to road safety and rider behaviour. Some of these relate directly to messages in TAC advertising – for example the dual responsibility of both motorists and riders for safety on the roads, as well as the need for riders to take responsibility for minimising the severity of crashes they may have by wearing appropriate clothing.

Last year’s campaign “Put yourself in their shoes” had a positive impact on the proportion of riders who believed that both drivers and riders are equally responsible for ensuring that motorcycle riders are seen – with two thirds believing that the responsibility is shared. This year, there has been a dramatic change, with over seven in ten (72%) riders now saying it is their responsibility. This view is held across riders of all types and particularly by those who recall the ads either spontaneously or on prompting (74%)

Chart 41: Responsibility for ensuring motorcyclists are seen



Q48. Who is responsible for ensuring that motorcycle riders are seen? (Base: All respondents)

A change in the sense of responsibility has not translated into perceptions of the way that riders feel they are viewed by drivers, with two thirds of riders continuing to say that drivers feel negatively towards them (66%).

Table 17: How motorcyclists feel car drivers perceive them

Q49 - Generally speaking, do you think car drivers feel positively or negatively toward motorcyclists?	Total	Age			Spont. Recall	
		18-25	26-39	40+	Yes	No/DK
	%	%	%	%	%	%
Base: All respondents	250	28	95	127	118	132
Positively	14	0	14	16	11	18
Negatively	66	75	73	62	68	64
Neither positive or negative	15	22	11	15	15	14
Don't know	5	3	2	7	7	4
Total responses	100	100	100	100	100	100

Green = significantly higher (to 80%) compared to at least one other group within the sub-group

Bold green = significantly higher (to 90%) compared to at least one other group within the sub-group

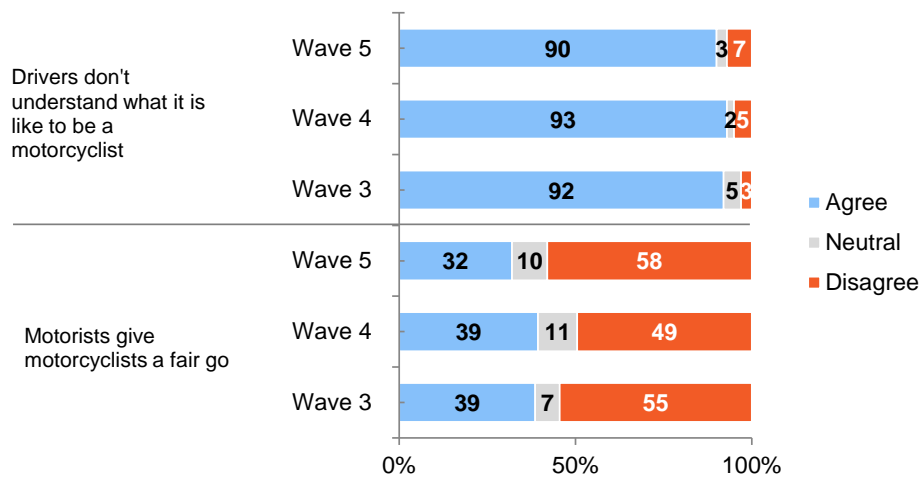
The TAC advertising campaign may have aided the perception that motorists' hold a **negative** image of riders—riders who had seen the ads were half as likely to consider their image to be positive amongst motorists as those who could not recall the advertising.

The reasons that motorcyclists gave for drivers holding negative views can be summarised as:

- Drivers themselves do not look for bikes and pull out in front of them (16%);
- “Motorcyclists split lanes” (16%);
- “Bikers split lanes” (16%); and,
- “Bikers have a poor reputation” (15%).

Riders were asked the extent to which they agreed or disagreed with some statements relating to driver/rider relations. As can be seen in Chart 42, the vast majority of riders do not think that motorists have any idea what it is like to be a motorcyclist (90%) and this view has remained stable. At the same time, the minority (32%) believes that motorists give riders a fair go and this is down significantly by 7 points since last wave.

Chart 42: Motorist and rider perceptions of each other



Q47 Can you tell me whether you agree strongly, partly neither agree or disagree or disagree strongly with the following statements? (Base: All respondents, n=250)

The role of protective clothing

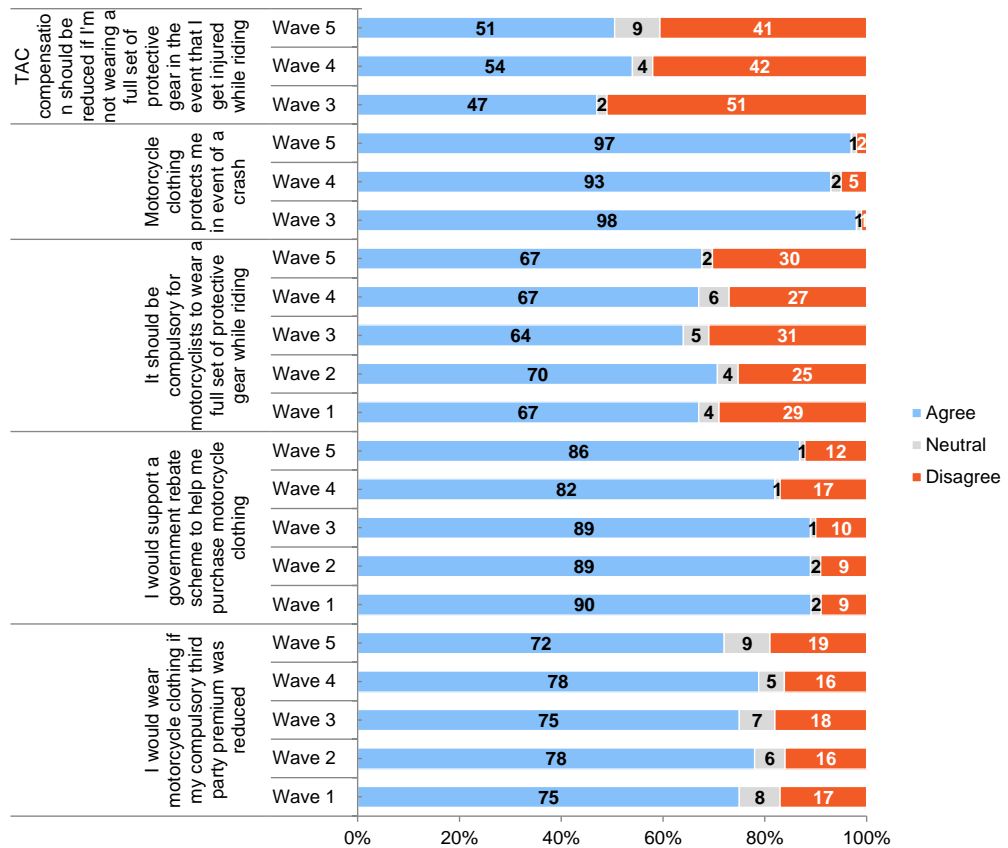
Attitudes towards protective clothing were largely similar in Wave 5 to previous waves. Motorcycle riders were particularly likely to agree that:

- Motorcycle clothing protects me in the event of a crash (97%);
- I would support a government rebate scheme to help purchase motorcycle clothing (86%).

While still in the majority, the proportion agreeing was not as high with regards to the following:

- I would wear motorcycle clothing if my compulsory third party premium was reduced (72%);
- It should be compulsory for motorcyclists to wear a full set of protective gear while riding (67%); and,
- TAC compensation should be reduced if not wearing a full set of protective gear (51%).

Chart 43: Attitudes towards protective motorcycle clothing



Q47 Can you tell me whether you agree strongly, partly neither agree or disagree or disagree strongly with the following statements? (Base: All respondents, n=250)