



THINK! Road Safety Campaign Evaluation

'Named Rider' Summer motorcycle campaign

August 2011

Prepared for: the Department for Transport



Table of Contents

1	Management summary and recommendations	i
1.1	Introduction and background	i
1.2	Campaign awareness	i
1.3	Campaign communications	ii
1.4	Impact on attitudes towards motorcycle road safety	iii
1.5	Perceptions and behaviour relating to motorcycle accidents	iv
	Conclusions	v
2	Introduction	vii
2.1	THINK! road safety background.....	vii
2.2	Campaign background	vii
2.2.1	Change in activity	viii
2.2.2	Current campaign activity	viii
2.3	Research objectives and method	x
2.4	Arrangement of this report	xi
3	Campaign awareness	12
3.1	Awareness of sources of advertising about motorcycle road safety	12
3.2	Proven recall.....	14
3.3	Prompted Recognition	16
3.4	Attitude towards current amount of road safety advertising	23
4	Campaign communication	26
4.1	Communication of the 'Named Rider' radio ad	26
	Messages communicated by the 'Named Rider' radio ad	29
5	Impact on attitudes towards motorcycle road safety.....	32
5.1	Driver awareness of motorcyclists while driving.....	32

6	Perceptions and behaviour relating to motorcycle accidents.....	36
6.1	Common causes of motorcycle accidents.....	36
6.2	Precautions taken to avoid accidents with motorcyclists	42
6.3	Responsibility for reducing accidents.....	43
	Appendix A: Sample Profile	45
	Appendix B: Sampling method	49
	Appendix C: Weighting procedures	50
	Appendix D: Questionnaire	52

Index of Figures

Table 2a: Campaign activity from 20 th June to 15 th July 2011	ix
Chart 3a: Whether seen/heard advertising about motorcyclist road safety in any of these ways	12
Chart 3b: Recall of advertising about motorcyclist road safety (spontaneous) ...	15
Chart 3c: Total prompted recognition of 'Named Rider' campaign (any ad)	18
Chart 3d: Recognition of Summer 2011 'Named Rider' radio ad compared with previous ads (amongst commercial radio listeners)	19
Chart 3e: Recognition of Summer 2011 'Named Rider' campaign compared with previous THINK! radio led campaigns (any ad and radio ad)	20
Chart 3f: Recognition of Summer 2011 'Named Rider' – petrol station ad	21
Chart 3g: Recognition of Summer 2011 'Named Rider' – Video on Demand ad ..	22
Chart 3h: Recognition of Summer 2011 'Named Rider' – online ad	23
Chart 3i: Agreement that there is too much advertising about road safety	23
Table 4a: Which of the following do you personally feel about the 'Named Rider' radio ad (prompted) - subgroups	26
Chart 4a: Main message understood from 'Named Rider' radio ad (spontaneous)	29
Chart 5a: Level of agreement with statements – All drivers	32
Chart 5b: Level of agreement with statements – All drivers who recognised one or more of the campaign ads	34
Chart 6a: Most common cause of motorcycle accidents (spontaneous) – All adults	36
Chart 6b: Most common cause of motorcycle accidents (spontaneous) – All drivers	38
Chart 6c: Most common cause of motorcycle accidents – Top three (prompted) – All adults	39
Chart 6d: Most common cause of motorcycle accidents – Top three (prompted) – All drivers	41

Chart 6e: Precautions taken to avoid accidents with motorcyclists (frequency).. 42

Chart 6f: Where feel responsibility for reducing accidents involving motorcyclists
lies 43

1 Management summary and recommendations

1.1 Introduction and background

- This report summarises pre and post campaign evaluation research carried out in summer 2011, to evaluate the second burst of the THINK BIKER 'Named Rider' campaign activity. The 2011 campaign was radio-led whereas the launch of the 'Named Rider' campaign in 2010 was TV-led.
- This research wave was the first post stage evaluation for a motorcycle safety campaign without TV advertising. In tracking for the summer 2011 campaign activity respondents were shown a 30 second radio ad, stills from an Video-on-Demand ad (essentially the 'Named Rider' TV execution), and stills from an online display advertising and petrol station video screens, and awareness and reactions to them measured.
- Fieldwork ran from the 15th to the 19th June 2011 for the pre-stage, and from the 15th July to the 19th July 2011 for the post-stage. Interviews were conducted in-home, using the TNS face to face omnibus survey.
- In total 2,043 pre-stage and 2,017 post-stage interviews were conducted with those aged 16+ in Great Britain.

1.2 Campaign awareness

- Three quarters of all adults (76% rising to 81% of drivers) could name a source in which they recently had seen or heard something about motorcyclist road safety, up from seven in ten at the pre-stage (71% rising to 77% of drivers). Most people thought they had seen something on a TV ad.
- One in ten mentioned seeing or hearing something about motorcyclist road safety in a source linked with the latest burst of the campaign, increasing significantly pre to post campaign (8% up to 12%) – which reflects the significant increase in the mention of radio as a source of awareness (which increased from 4-10%). Drivers were more likely to have seen or heard something in a relevant source (15% at the post stage).
- When asked to describe what they had seen most said 'motorcyclist was named/personalised/gave details of their lives' (31% of all adults, 32% of drivers). Two in ten described the campaign strapline 'THINK BIKE, THINK BIKER' (18%, rising to 17% of drivers).
- Upon prompting, around six in ten adults recognised at least one of the ads from the (radio led) Summer 2011 activity (56% of all adults, 59% of

drivers), compared with two thirds at the (TV led) launch of the campaign (66% among both all adults and drivers).

- The Summer 2011 activity performed similarly in terms of recognition to the Child Restraints activity from back in 2006 (which was a one off campaign), but less well than the Drink Drive Christmas 2010 activity (however, this was based on a more established campaign).
- A third of commercial radio listeners recognised the radio ad (34%) and a similar proportion of Video on Demand users recognised the VOD ad (32%). Eighteen percent of internet users recognised the online display ad (similar to the proportion who did so in 2010). Four in ten of all adults (40%, rising to 43% of drivers) said they recognised the petrol station screen ad.
- Only a small proportion, just under one in twenty (5% at the pre stage and 6% at the post stage for both all adults and all drivers) thought that there was 'too much advertising about road safety'.

1.3 Campaign communications

- Three new national radio adverts were developed for the 2011 campaign. In 2010, ten regional executions were used, based on a similar personalisation theme but using a different approach. Respondents were played one of the three latest radio ads in the interview and asked whether they recognised this or something similar. They were then asked about their reactions to the ad. The radio ad made a reasonable impact, with a quarter of adults agreeing that it stuck in their mind (25% of all adults and 26% of drivers).
- The second most common response in terms of impact, selected by 16% of adults (and 15% of drivers), was that the ad was confusing. However those who remembered the ad from hearing it before the interview were less likely to find it confusing than those who heard it for the first time at the interview (8% compared with 16%) which suggests the confusion dissipates on further listening. This backs up the findings of the qualitative pre-testing research, which showed that the adverts were most effective if listened to 2+ times and was the most effective creative execution for a medium weight radio campaign.
- A minority had negative responses to the ad, with one in twenty saying they found the ad irritating (6% of all adults and 7% of drivers) with ABC1s particularly likely to say this (8%). A handful found the ad shocking (2% of all adults and 1% of drivers).

- Fourteen percent of drivers agreed the ad made them think about their own driving. Eight percent said that the ad had made them drive more carefully.
- With regard to attitudes and behaviours towards motorcyclists, one in ten (11% of all adults and 12% of drivers) said the ad had made them feel more empathy towards motorcyclists. Similar proportions said the ad had made them think they should take longer to look for motorcyclists (12% of all adults and 14% of drivers) and take more notice of the people riding motorcycles (12% of all adults and 14% of drivers) with these two messages more commonly perceived among drivers.
- In terms of targeting, eight percent thought that the ad was aimed at someone like them, in particular drivers at 11%. This is not an unusual response for road safety advertising as people may see it aimed at dangerous drivers who they would not identify with.
- In terms of 'talkability', 6% thought the ad told them something new (4% of drivers), and four percent of all adults and drivers, said they would talk about the ad with others.
- The most frequently cited main message for the radio ad was to 'look out for motorcyclists', spontaneously mentioned by one in five adults (21% of both all adults and drivers). Seventeen per cent of adults picked up the message that you should 'think about the person on the bike / personalising the riders', rising to 23% among drivers. Just under one in ten thought the main message was that 'motorcyclists are human / people' (8% of all adults rising to 10% of drivers). This is encouraging as the core aim of the campaign is to personalise motorcyclists.
- Those who had remembered hearing the ad when on-air were more likely to be positive about the ad than those who heard it for the first time in the interview and were less likely to find it confusing (8% compared with 19% of non recognisers) and irritating (2% compared with 8% of non recognisers).

1.4 Impact on attitudes towards motorcycle road safety

- The majority of drivers agreed that motorcyclists are more vulnerable in every day driving situations than other drivers on the road (89%). Those more likely to agree strongly with this statement included drivers over the age of 30 (67%) and those from a white ethnic background (66%).
- Over half of drivers (54%) agreed that when they see a motorcycle, they think about the person riding it. A quarter disagreed with this (27%). Male

drivers aged between 45 and 54 and those who know someone who rides a motorcycle were more likely to agree and those who recognised any advertising used in the 'Named Rider' campaign were more likely to *strongly* agree with this.

- Half of drivers agree that they often worry about failing to notice a motorcyclist and hitting them (51%), and has remained stable since the pre-stage. Three in ten disagree with this (31%).
- Despite the majority of adults agreeing that motorcyclists are vulnerable, three in ten still agreed that 'Although I know motorcyclists are human beings too, I sometimes forget this and only see the bike' (30%) and a quarter that 'Although I know motorcyclists are human beings too, I sometimes forget to pay extra attention to look out for them while driving' (26%).

1.5 Perceptions and behaviour relating to motorcycle accidents

- When all adults were asked to spontaneously say what they thought was the most common cause of motorcycle accidents, 'speeding' (22%) emerged as the number one response, stable from the pre stage and 2010. This was actually lower among drivers than non drivers (18% compared with 30% of non-drivers).
- Other commonly perceived causes mentioned by adults were focused on issues of visibility and careless driving.
- Once presented with a range of possible causes of motorcycle accidents, half of adults (49% rising to 53% of drivers) considered a car driver pulling out in front of a motorcyclist at a junction to be amongst the top three causes of motorcycle accidents or a motorcyclist loses control because they are travelling too fast (49% again rising to 53% of drivers). This was followed by a 'car driver doesn't notice a motorcycle trying to overtake' (43% rising to 47% of drivers).
- Results show that the majority of drivers claim to always take precautions to avoid accidents with motorcyclists. Amongst these precautions the most frequently taken are 'looking out for motorcycles when driving' (91%) and 'checking for motorcyclists when changing lane on a dual carriageway' (87%). The results at the 2011 post stage showed no significant differences to those found in 2010.
- Seven in ten adults indicated that they felt car drivers and motorcyclists are equally responsible for reducing motorcycle accidents (69% and 68% of drivers). There was a significant shift in the response of young male drivers regarding responsibility for accidents. In 2010, 50% of young

males aged 17-29 believed that responsibility was equal, in 2011 this had increased to 73%.

Conclusions

The Summer 2011 burst of the THINK BIKER 'Named Rider' campaign performed relatively well in terms of recognition, however it did not seem to make the impact previous motorcyclist campaigns have seen.

It could be that the lack of a TV element to this burst of the campaign, combined with an ever increasing distance from previous (more heavyweight and TV led) THINK! motorcyclist campaign activity, and not being supported by other THINK! strands (which provided synergy benefits), have contributed to this reduced impact.

In terms of recognition, following the activity an increased number of adults could name a source in which they had seen or heard something about motorcyclists lately with one in ten adults mentioning a source used in the latest burst of the 'Named Rider' campaign – in particular radio ads. This is encouraging, given the latest burst was radio led.

It also looks like the personalisation message of this campaign continued to build - when asked to describe off the top of their mind what they had seen or heard, they were most likely to say that the 'motorcyclist was named or personalised/gave details of their lives' (31% of those aware of motorcyclist road safety advertising compared with 17% mentioning anything related to the personalisation message in 2010) rather than the pulling out at a junction which was the most common response in 2010. In a similar vein, when asked what the main message of the radio ad was, a significant proportion of all adults stated it was to 'think about the person on the bike' or that 'motorcyclists are human / people' (17% an increase from 9% after the launch phase).

Upon prompting with the ads, six in ten adults recognised at least one of the ads, a very respectable level given that the total recognition of the TV led 2010 campaign launch reached two thirds, so nearly comparable, suggesting TV might increase the points of contact with the campaign rather than increasing the reach of the campaign. Radio ad awareness held stable from the 2010 launch, with the cost per awareness point remaining the same for 2011 as in 2010 indicating the 2011 radio ad is performing well, especially given it had no TV support which could be expected to have provided a boost for the 2010 awareness levels. Petrol station and Video On Demand ads performed well amongst their respective audiences (with VOD possibly helped by being used in previous TV activity). The petrol station ad recognition was particularly good given the relative level of spend, so would be a useful avenue to explore further.

When asked to select attributes of the radio ad, the most common response cited was that it stuck in the mind, although this was followed by the belief that it was confusing – again indicating the ad is working in terms of awareness, but reflecting creative development research that indicated the advert required more than one listen to be effective. Most respondents only heard the advert once as part of the interview. It would be interesting to see if clarity and impact builds after any subsequent bursts.

In terms of campaign impact on attitudes and behaviours; the level of agreement that motorcyclists are vulnerable remains high (as prior to the campaign) so it would be difficult to shift this significantly, and relatively low numbers of drivers admitted that 'although they know motorcyclists are human beings too, they sometimes forget this and only see the bike' and that they 'sometimes forget to pay extra attention to look out for them while driving'. However, there were no significant changes seen in these attitudes following the 2011 campaign burst, not building significantly on levels recorded in 2010.

When asked to give a spontaneous response, speeding (no detail of by whom) was thought to be the most common cause of accidents involving motorcyclists, with other themes arising of visibility issues and careless driving. Once presented with a range of possible causes, 'a car driver pulling out in front of a motorcyclist at a junction' or 'a motorcyclist losing control because they are travelling too fast' were considered to be the main causes of motorcycle accidents by equal proportions of respondents (unlike 2010 where, when prompted, drivers were seen to be the main cause, indicating less blame is being levelled towards them in 2011). This reflects the finding that, this year, the majority of adults felt car drivers and motorcyclists are equally responsible for reducing motorcycle accidents, which represented an increase from 2010. This change may have been led by an increase in young males believing that responsibility is equal.

The majority of drivers (at least 8 in 10 for each measure) still claim to always take precautions to avoid accidents with motorcyclists. The results at the 2011 post stage showed no significant differences to those found in 2010, however this is unsurprising given the high starting position.

2 Introduction

2.1 THINK! road safety background

The June / July 2011 activity was planned and approved in April 2011, prior to publication of the Government's new Strategic Framework for Road Safety¹ (May 2011). This campaign was therefore devised in support of the 10 year road safety strategy that was published by the Government in 2000. However, whilst most road user groups saw reductions in casualties, motorcyclist deaths were not reducing. Motorcyclists killed during the baseline period represented 13% of all road related fatalities, in 2009 they accounted for 21%. Motorcyclists' share of vehicle traffic remained constant over the period at around 1%.

The Government's new Strategic Framework for Road Safety² (May 2011) was published after the THINK BIKER 2011 campaign was approved, but reaffirms the original policy rationale underpinning it by stating that 'road safety is a priority for the government' and that a key priority for the strategy is 'sustaining the recent reductions and making further progress in reducing road deaths and serious injuries'. The Strategic Framework also sets out priorities relating to developing the skills and attitudes of road users, one of which is 'to encourage continuous development of skills, particularly when people are at their most vulnerable – such as children when they start to make independent walking and cycling journeys, drivers and motorcyclists'.

THINK! campaign priorities are identified by the Department for Transport's publicity team in collaboration with policy officials in the Road User Safety Division. They are chosen because they account for the highest number of road casualties and it is felt that they will benefit most from coordinated national publicity.

2.2 Campaign background

The current motorcycle safety campaign, 'Named Rider', launched in March 2010 using a variety of communication activities aimed at drivers and motorcyclists. The core aim of the campaign is to get car drivers to notice motorcyclists on the road by thinking more about the person riding the motorcycle, and is supported

¹ DfT Strategic Framework for Road Safety (May 2011)

<http://assets.dft.gov.uk/publications/pgr-roadsafety-strategicframework-pdf/strategicframework.pdf>

² DfT Strategic Framework for Road Safety (May 2011)

<http://assets.dft.gov.uk/publications/pgr-roadsafety-strategicframework-pdf/strategicframework.pdf>

by the line 'THINK BIKE THINK BIKER'. At its launch in 2010, national activity included the TV/cinema ad 'Named Rider', radio ads, press, online display and search content, posters and signs at garages/service areas. Poster, radio and TV activity was also up-weighted by TfL in the London area (evaluated and reported upon separately). The second burst of this campaign took place in summer 2011, without TV, cinema, press or posters (making the campaign radio-led for the first time) and the addition of Video on Demand and petrol station screens. Details of media channels and costs can be found in table 2a.

For background, the THINK! motorcycle safety campaign activity preceding 'Named Rider' was named 'How Close' which illustrated the importance of driver vigilance towards motorcyclists at junctions and was supported by the line: 'Look, look, then look again – take longer to look for bikes'.

2.2.1 Change in activity

This report focuses on the evaluation of the Summer 2011 'Named Rider' activity, the second burst of this campaign following on from the March 2010 launch.

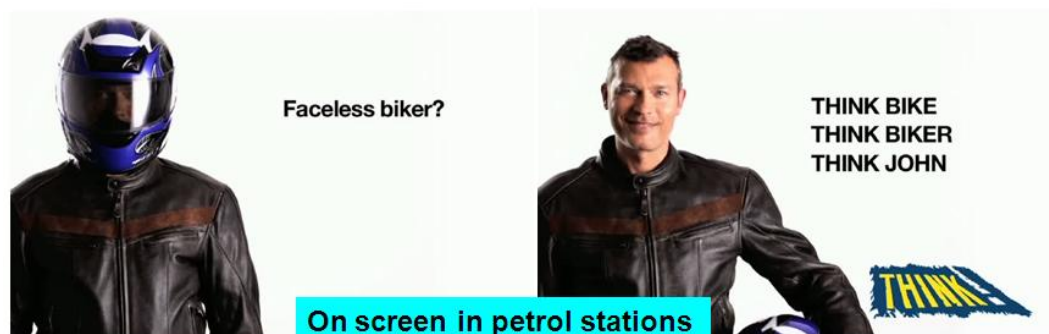
Between the two bursts of this biker campaign the Coalition government was elected (May 2010). Whilst policy strategy and budget decisions were made it was requested that all public sector campaign activity was either pared back or placed on hold until further notice.

Following the October 2010 spending review, it was decided it was important that the THINK! campaign should continue (though at a reduced level). This meant the removal of TV from the general THINK! media mix, including for the burst of the 'Named Rider' campaign evaluated in this report.

2.2.2 Current campaign activity

The Name Rider campaign was launched in March 2010 led by a TV/cinema ad, and accompanied by radio, online and poster ads.

The second burst of the campaign in Summer 2011 was led by three versions of a new 30 second radio ad (with a slightly different creative to the March 2010 radio ad – albeit the same core message) and accompanied by radio advertorial community messaging (not evaluated in this research), a Video on Demand ad (using the 'Named Rider' TV/cinema ad from March 2010), a petrol station video screen ad and online display ads, additional pay-per-click search advertising which targeted bikers (also not evaluated in this research).



The campaign ran from 20th June to 15th July 2011, including the following activity:

Table 2a: Campaign activity from 20 th June to 15 th July 2011
Activity
<i>Radio advertising</i> (upweighted around drivetime, morning and evening, targeting 'in-drive' moments)
<i>Radio community messaging</i> (not evaluated)
<i>Online activity</i> <ul style="list-style-type: none"> • <i>Video on Demand ad</i> (with one million estimated impressions) • <i>Online display advertising</i> (with 27 million estimated impressions, upweighted towards men aged 25-50) • <i>Pay-per-click Google advertising</i> targeting bikers
<i>Petrol station videos</i> (on 1,069 screens)

2.3 Research objectives and method

This report focuses on research carried out in June and July 2011 to evaluate the second burst of the 'Named Rider' campaign.

Research was conducted prior to the 2011 campaign activity (a pre stage) to establish a benchmark for the campaign following a year of absence since 2010 and the change in campaign mix. A post stage was then conducted following activity to look at awareness and impact of the campaign. The objectives of the research were as follows:

- To measure 2011 campaign awareness and its impact on driver attitudes towards motorcyclists and road safety, including where the responsibility for reducing road accidents with motorcyclists lies;
- To compare 2011 campaign out-takes and outcomes with those measured in 2010 in order to identify positive or negative shifts in relation to campaign objectives and learnings to improve future campaigns;
- To gauge driver awareness of motorcyclists while driving and to understand how motorcycles and their riders are seen from the drivers perspective;
- To determine what is perceived as the most common causes of motorcycle accidents and the precautions taken to avoid accidents with motorcyclists.

Pre-stage fieldwork ran from 15th to 19th June 2011, while post-stage fieldwork ran from 15th to 19th July 2011. Interviews were conducted using TNS-BMRB's face to face omnibus survey. Interviews were conducted in-home, using Computer Assisted Personal Interviewing (CAPI). The sample was drawn by means of Random Location sampling (see appendices for further details).

In total, 2,043 interviews were conducted at the pre-stage of research and 2,017 were conducted at the post-stage, with those aged 16+ in Great Britain at the latest wave of research. Data were weighted to be representative of the population. Only weighted data are shown in this report.

A pre and post stage evaluation were carried out around the initial launch of the 'Named Rider' campaign in February and April 2010 respectively, and details of this can be found in a separate report.

In the summer of 2009 it was decided that the definition of 'driver' should refer to those who drive a car or van/lorry only. Any reference to 'drivers' prior to July

2009 refer to car, van/lorry and motorcycle riders. Since July 2009, any reference to 'drivers' will include just car and van/lorry drivers. However as those who only ride a motorcycle are a very small proportion of the population the impact on the results will be negligible.

2.4 Arrangement of this report

Prior to this introduction was a management summary of the findings. The main body of the report provides a detailed commentary, illustrated by summary tables and charts. Appendices contain details of the sampling method, weighting, the sample profile and the questionnaires.

Data have been supplied in separate volumes.

In charts and tables '-' denotes 0 and '*' denotes a proportion of less than half of one per cent, but more than 0.

Significant differences between sub groups and between previous waves of research have been noted where applicable. Significance testing was carried out at the 99% significance level.

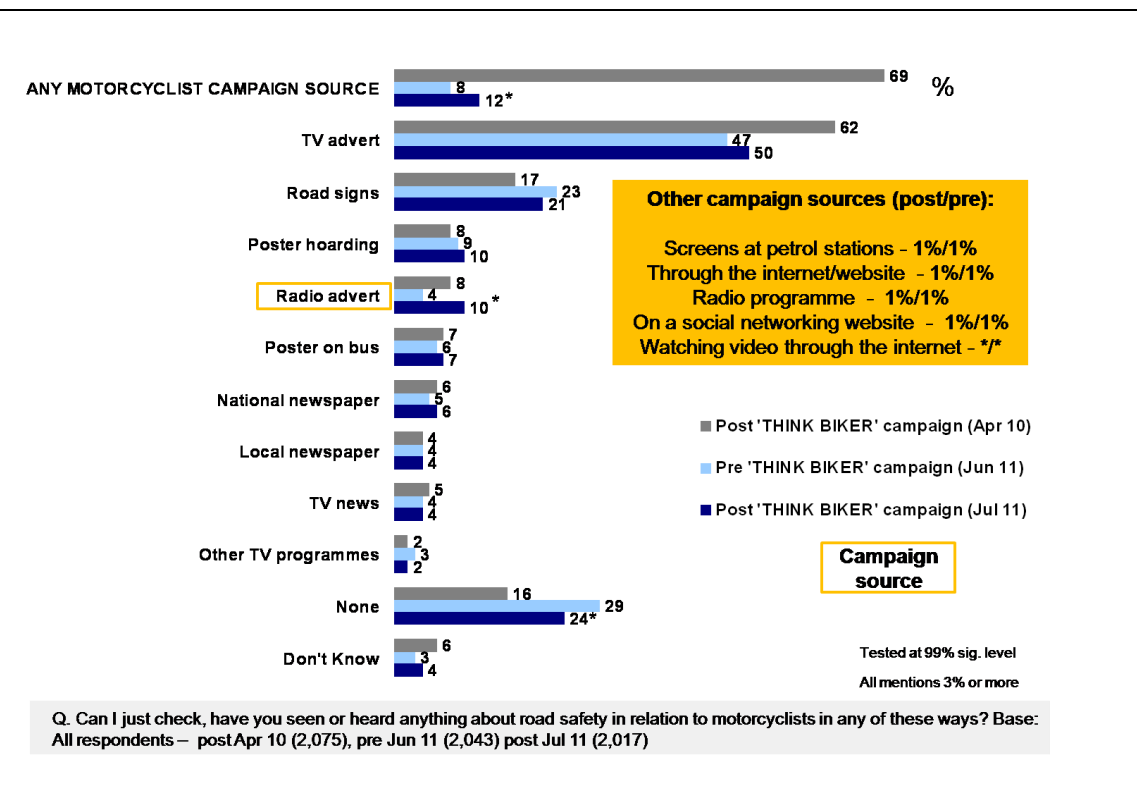
3 Campaign awareness

This section of the report looks at overall awareness of the Summer 2011 'Named Rider' campaign, starting with awareness of sources of advertising and publicity about motorcycle road safety, before moving on to spontaneous awareness of campaigns about motorcycle road safety and then going on to look at prompted recognition of the specific ads used in the Summer 2011 burst of the biker campaign.

3.1 Awareness of sources of advertising about motorcycle road safety

Starting broadly, all respondents were prompted with a list of media sources, and asked whether they recalled seeing or hearing anything about motorcyclist road safety in any of these sources recently. Media sources used at this burst of the campaign (radio ads and programmes, online display ads, on-screen ads at garages and video on demand ads) were shown together with other previously used media (eg. TV, cinema and poster) as well as sources not employed by the current biker campaign. This gives a proxy measure of which campaign media stood out as being top of mind for this specific burst of the campaign. All other campaign sources receiving mentions of 3% or more are shown, with a net of those utilised at this burst of the campaign shown at the top of the chart (definition as above).

Chart 3a: Whether seen/heard advertising about motorcyclist road safety in any of these ways



Following the Summer 2011 activity, three quarters of adults could name a source in which they had seen or heard something about motorcyclists lately (76%), up significantly from seven in ten at the pre stage (71%) – indicating awareness of the campaign. However, most of these people thought they had seen something on a TV ad (47% at the pre and 50% at the post), indicating it is not the latest burst of the 'Named Rider' which they were thinking of, and instead suggesting a memory exists of the previous TV led national biker campaigns.

Encouragingly, 12% of adults mentioned seeing or hearing something about motorcyclists in a source linked with the latest burst of the campaign, and this rises to 15% among drivers. This is significantly less than the proportion at the initial launch, (69%), however this was due to TV being part of the initial mix, with mentions of the latest campaign sources increasing significantly pre to post activity (8% at the pre stage rising to 12% at the post stage). This increase was likely to be fuelled by the significant increase in the proportion of adults recalling a radio ad following the campaign (from 4% at the pre stage up to 10% at the post stage). This is an encouraging result given the latest burst of the campaign was led by radio.

Just over two in ten adults at both the pre and post stages of the summer 2011 mentioned seeing something about motorcyclist road safety on a road sign (23% at the pre and 21% at the post stage). This may be linked to local authority signage around accident black spots or THINK! motorway signage activity, which frequently focuses on the 'THINK BIKE THINK BIKER' message.

Other campaign sources from the summer campaign (highlighted in the yellow box in chart 3a) were mentioned spontaneously in very small proportions – these included screens at petrol stations (1%), on a social networking site (1%) and on Video-on-Demand (<0.5%).

Certain subgroups were more likely to name a source relevant to the latest burst of the 'Named Rider' campaign. These were adults under the age of 55 (16% compared with 5% of those aged 55 or over), those from a white ethnic background (13% compared with 7% of those from black or minority ethnic backgrounds) and those with children in the household (16% compared with 10% of those with no children)

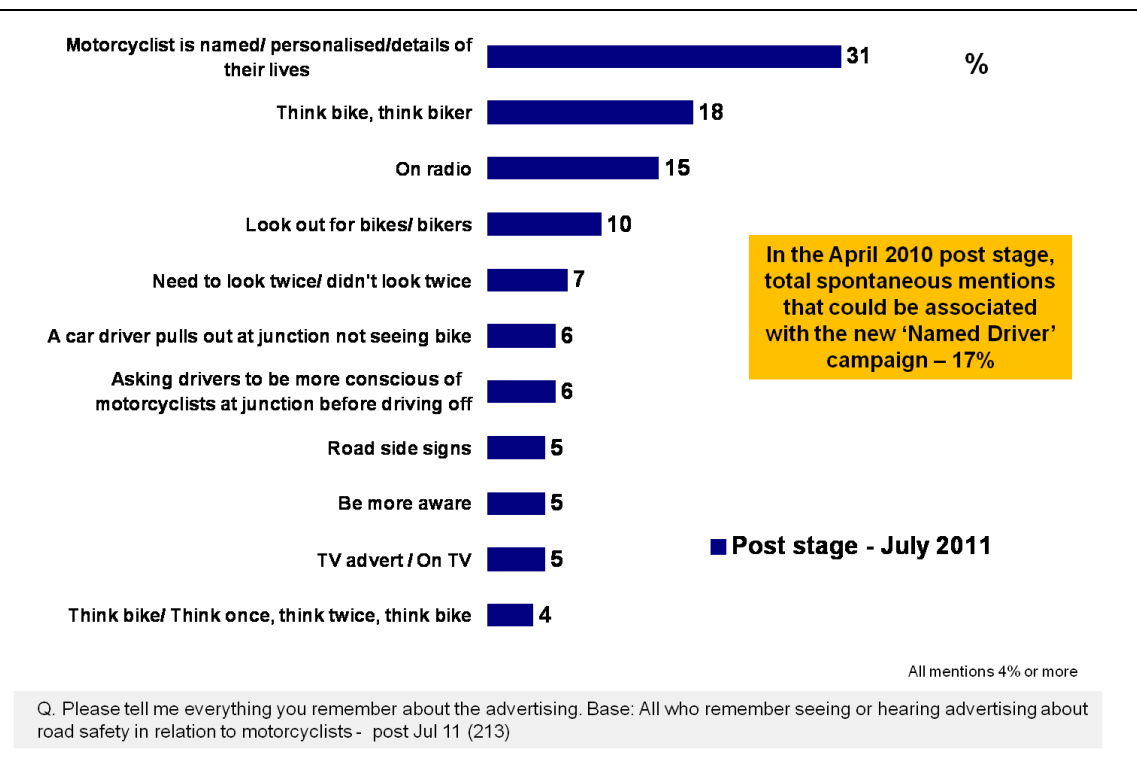
Additionally, there were some pockets of local level radio activity (prior to the 'Named Rider' Summer campaign) in a number of regions in early Summer 2011 – Yorkshire and Humber, East Anglia (Cambridge) and East Midlands (Peterborough) – however the proportions of adults mentioning that they were aware of hearing something about motorcyclists from a radio ad within each of these particular regions were no different to the national average, indicating that the earlier localised radio activity did not impact upon/overlap in terms of awareness of the national 'Named Rider' radio activity.

3.2 Proven recall

In order to measure recall and awareness of advertising relating to motorcyclist road safety, particularly the 'Named Rider' campaign ads, all adults who said that they had seen or heard some recent road safety advertising relating to motorcyclists in the relevant sources used at the latest campaign were asked to describe what they had seen or heard. Responses to this question were recorded verbatim and were later coded into categories for analysis. A large number of different descriptions were given, and only those responses given by 4% or more of adults are shown. Chart 3b summarises what adults had seen or heard about motorcyclist road safety recently, compared with the descriptions from April 2010 (the launch of the motorcyclist campaign). Below this is also displayed visually, with the size of the text representing the frequency of mentions.



**Chart 3b: Recall of advertising about motorcyclist road safety
(spontaneous)**



When asked to describe what they had seen or heard about motorcycle road safety, most respondents described something which was akin to the main message of the latest burst of the 'Named Rider' activity. Three in ten adults aware of some recent activity said the 'motorcyclist was named or personalised/gave details of their lives' (31% of adults and 32% of drivers).

In comparison with this, at the launch of the 'Named Rider' campaign in 2010 (TV led), 17% of all adults aware of motorcyclist safety related advertising and publicity gave a description which indicated that they were thinking of that campaign. Therefore, despite fewer people being able to recall seeing or hearing something at this most recent burst, those that had were more likely to describe it as being the current campaign, indicating good cut through. This is encouraging, and perhaps unsurprising, given the relatively 'quiet' public communications environment at present and the time elapsed since the previous motorbike activity.

Eighteen percent of 'aware' adults (and 17% of drivers) described a common campaign strapline 'Think Bike, Think Biker' compared with 2% post 2010 campaign. Fifteen percent simply described that they had heard something on

the radio which, although no detail was given, is encouraging as radio was the lead media of recent activity (15%).

One in ten adults mentioned the more generic campaign message of 'Look out for bikers' (10%).

A small proportion of adults described scenes that could be attributed to the previous THINK! motorcyclist campaign 'How Close' (last shown in April 2009) which emphasised the need for drivers to exercise greater awareness of motorcyclists while driving, although this is decreasing. The most commonly recalled elements of this campaign were a 'car driver pulling out at a junction and not seeing a bike', and 'need to look twice/didn't look twice' – both mentioned by around one in twenty adults at the post stage (6% and 7% respectively). In addition to this residual recall of the old campaign, one in twenty adults mentioned the old campaign strapline 'THINK BIKE, THINK ONCE, THINK TWICE, THINK BIKE' (4%).

3.3 Prompted Recognition

In order to accurately measure recognition of the latest burst of the campaign, respondents were played one of the new 30 second radio adverts and shown stills of the Video-on-Demand ad (the 30" TV advert 'Named Rider'), stills of the on-screen ad shown in garages and stills of the online display ads. As three similar versions of the radio ads were produced, respondents were played one version of the ad and asked if they had heard it, or something similar to it.

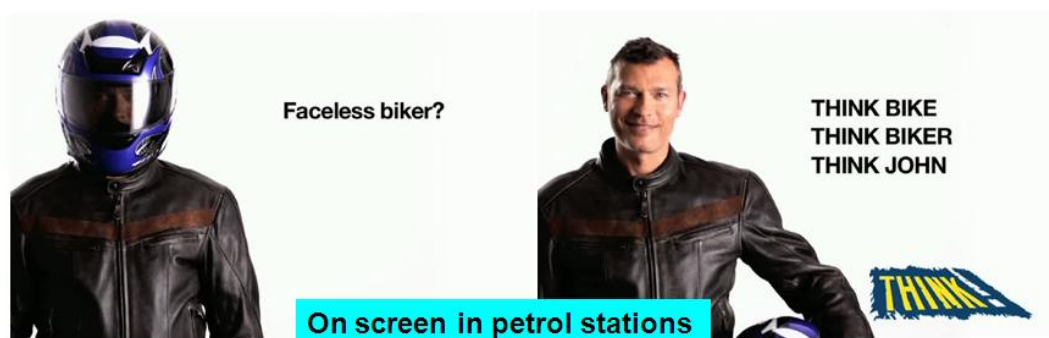
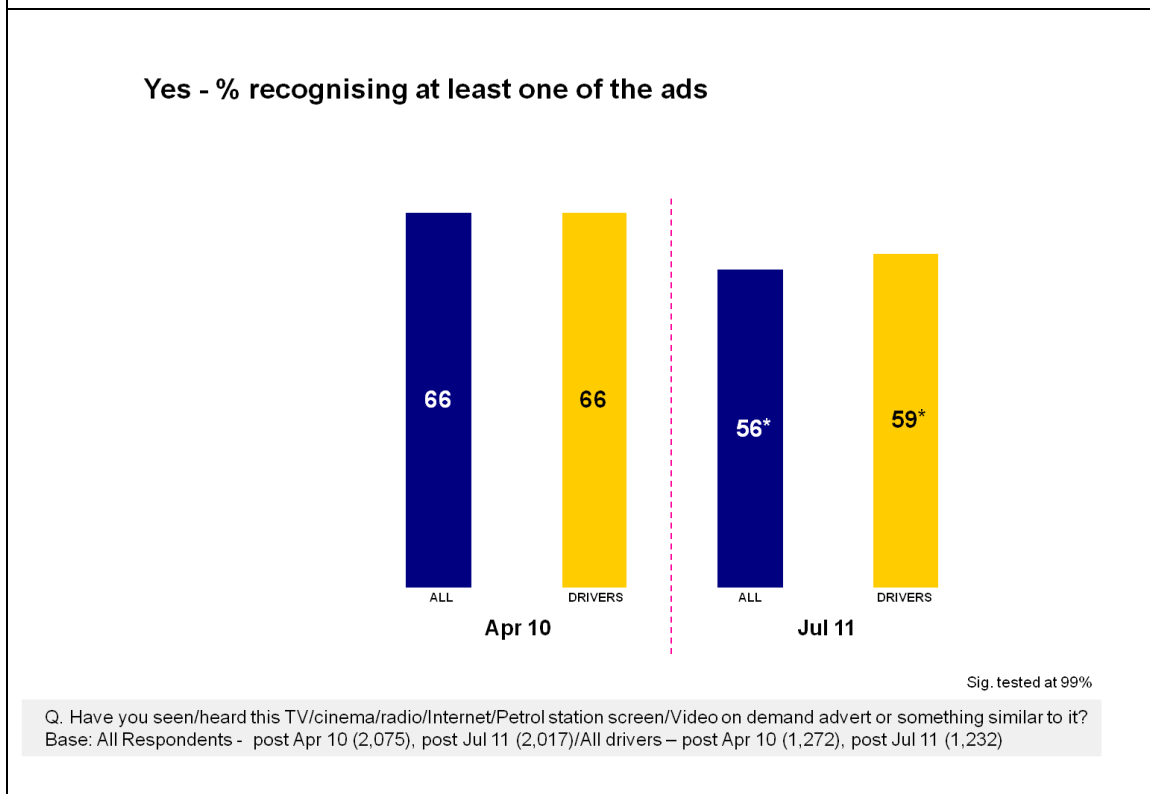


Chart 3c shows total recognition of the 'Named Rider' Summer 2011 campaign (i.e. those recognising at least one of the ads shown to them) compared with total recognition of the ads from the launch of the campaign (when it was TV led).

Chart 3c: Total prompted recognition of 'Named Rider' campaign (any ad)

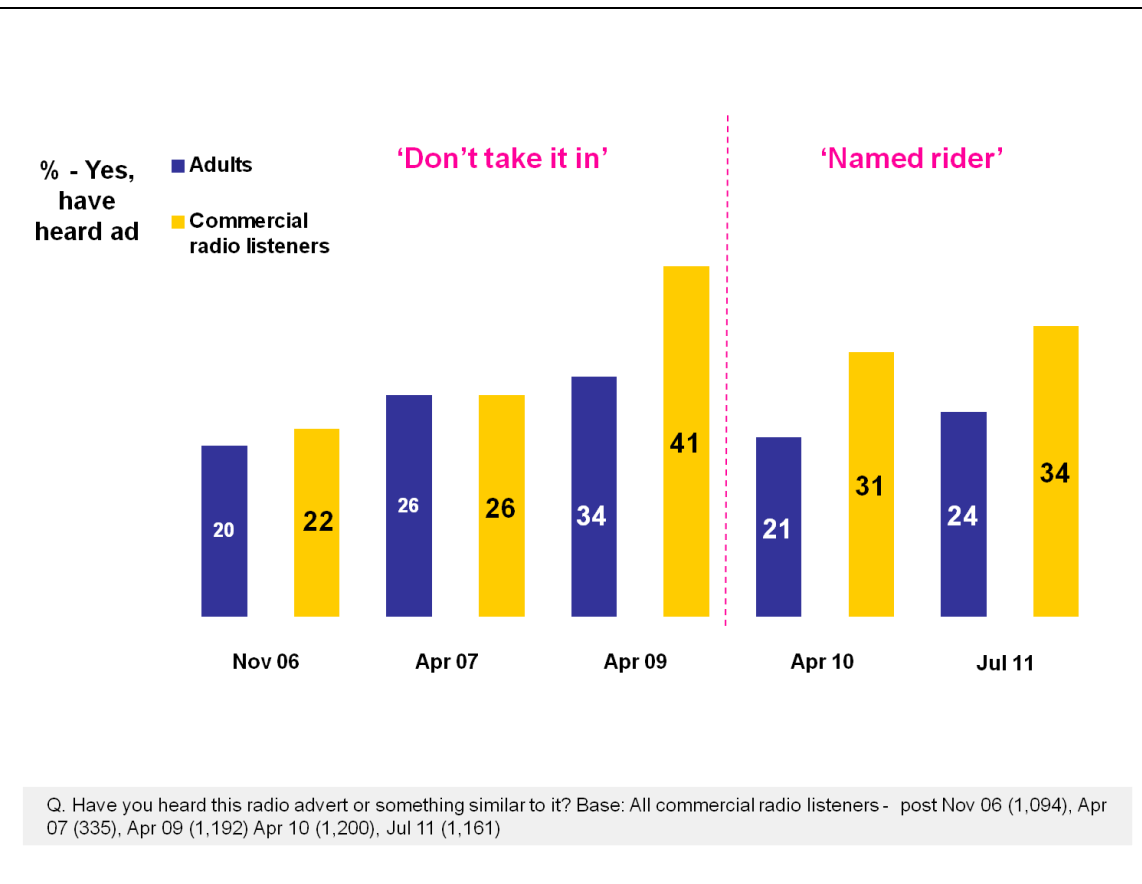


Upon prompting, six in ten adults recognised at least one of the ads from the 'Named Rider' Summer 2011 activity (56%, and 59% of all drivers). This is very respectable given that total recognition of the initial launch of the 'Named Rider' campaign in 2010, which was TV led, reached two thirds (66% of all adults and of all drivers).

The 'Named Rider' Summer 2011 campaign was more likely to be recognised by adults aged under 55 (71% compared with 41% of those aged 55 or more) and those who know someone that rides a motorcycle (63% compared with 48% of those who do not).

Chart 3d shows the recognition of the lead element of the 'Named Rider' Summer 2011 activity – the radio ad, compared with the recognition of the radio ad element from the launch of the campaign in 2010 (when it was TV led) and with recognition of the radio ad element of the previous motorcycle campaign (also TV led).

Chart 3d: Recognition of Summer 2011 'Named Rider' radio ad compared with previous ads (amongst commercial radio listeners)



Given the overall reduced spend and media mix of the Summer 2011 biker campaign, the latest radio ad element performed relatively well as the lead media. Over a third of adults who listened to commercial radio recognised the 'Named Rider' radio ad from the latest burst of the campaign (34%). Encouragingly, this was a similar proportion to those recognising the radio ad from the initial launch of the campaign (31%) when it was led by TV. The cost per recognition point scores were the same at both waves of the 'Named Rider' campaign indicating the latest radio ads are performing well especially given they have no TV support which could be expected to have provided a boost for the 2010 awareness levels.

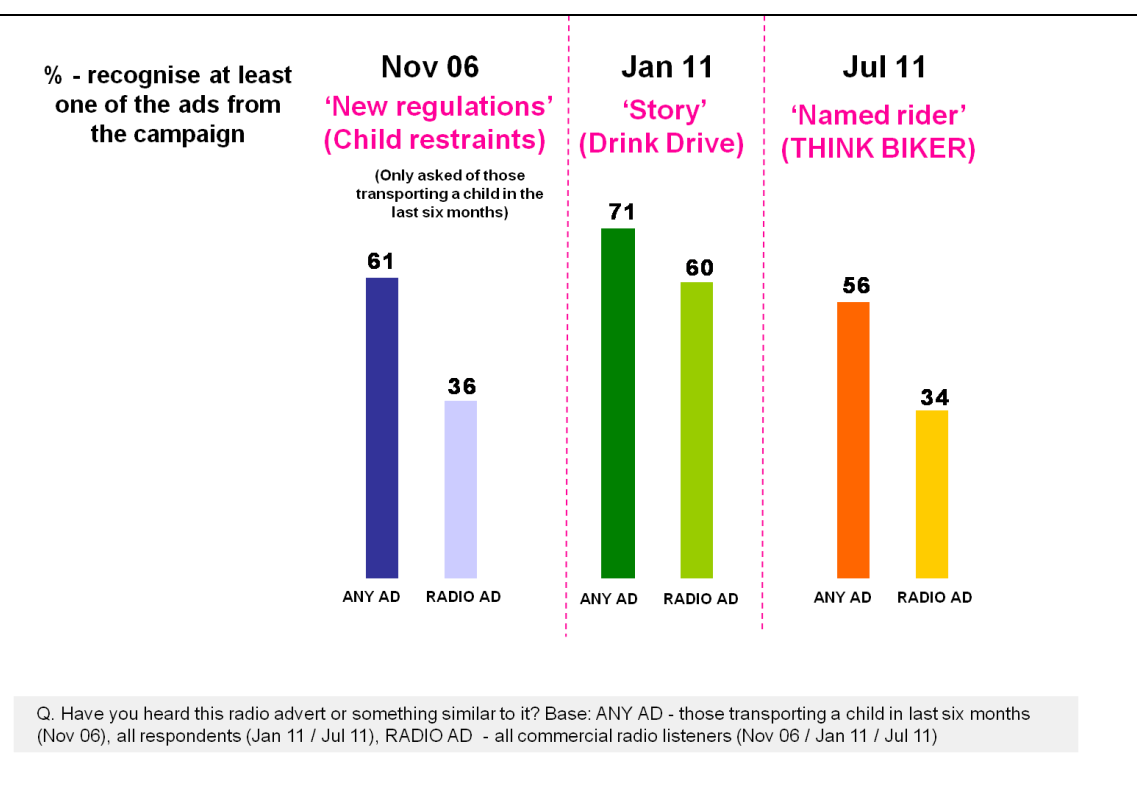
It also achieved a higher level of recognition than that seen for the radio ad element of the 'How Close' campaign, 'Don't take it in' – which was recognised by around a quarter of commercial radio listeners in its early stages (22%/26%).

As is to be expected, awareness of the radio ad was slightly lower among all adults, at around a quarter (24%).

Amongst all adults, certain subgroups were more likely to recall hearing the 'Named Rider' radio ad. These included drivers (26% compared with 19% of non-drivers), those aged under 55 (30% compared with 12%), those in Yorkshire and Humber region (31%, which, given we ask respondents to say whether they recognise 'this ad *or something similar*', may be linked with the earlier local radio activity presence in that region) and those who have a family member or friend who rides a motorcycle (28% compared with 22% of those who do not).

Charts 3e compares recognition of the Summer 2011 ads with recognition of other previous THINK! radio led campaigns.

Chart 3e: Recognition of Summer 2011 'Named Rider' campaign compared with previous THINK! radio led campaigns (any ad and radio ad)

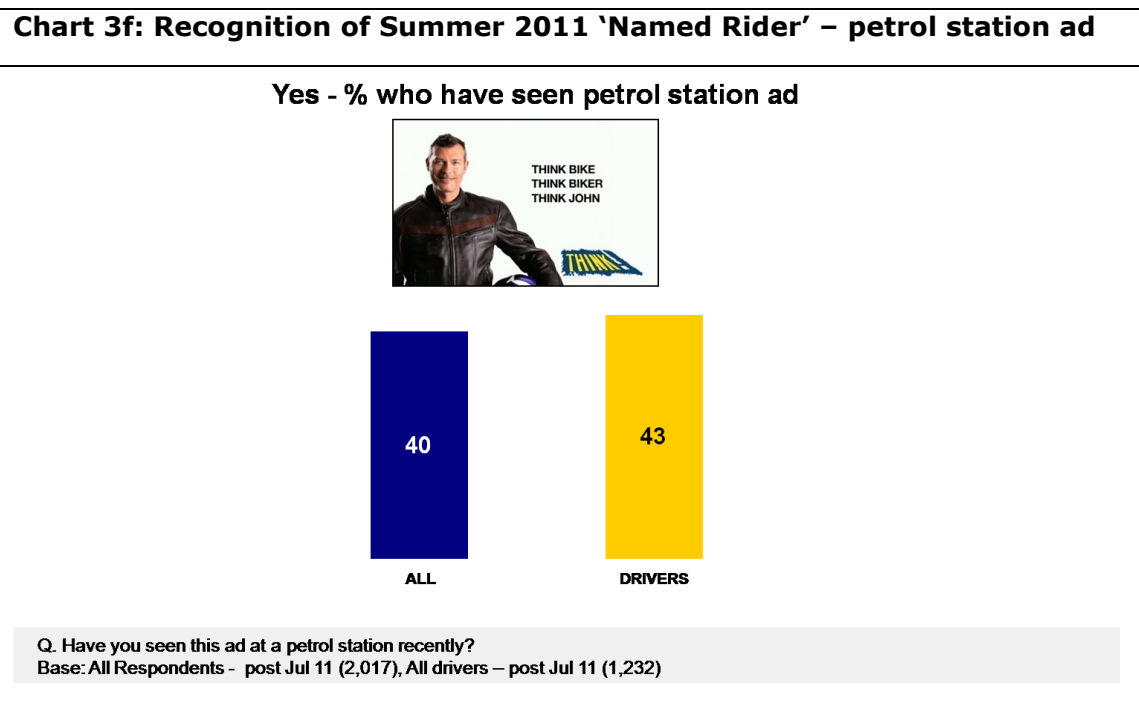


The 'Named Rider' Summer 2011 campaign performed in a similar fashion to the Child Restraints 'New Regulations' campaign from 2006 (also a new ad at that point), with around six in ten of all adults recognising at least one element of the campaign (56% and 61% respectively), and around a third of commercial radio listeners recognising the radio ad element in particular (34% and 36% respectively). Both radio ads for these campaigns were new executions.

It did not fare as well as the Drink Drive radio-led campaign from January 2011, which was recognised by around seven in ten adults (71%). The recognition of that campaign was strongly driven by the performance of the 'Story' radio ad - which was recognised by around twice as many adults as the BIKER radio ad

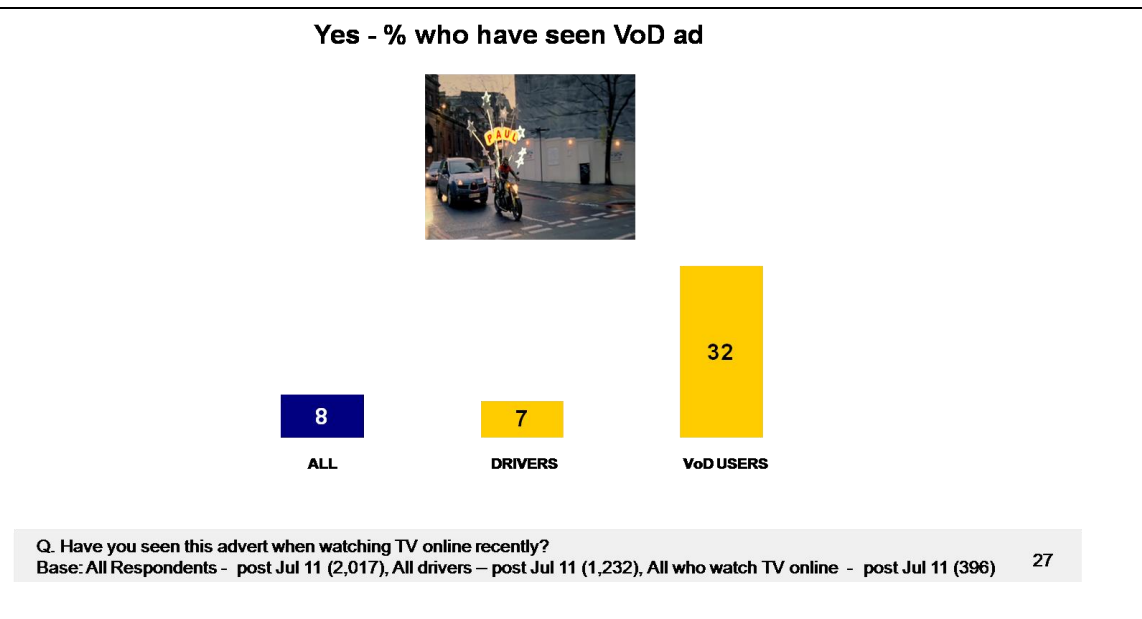
(60%). However, the Drink Drive radio ad was a repeat of a previous execution used in earlier bursts of the well established Personal Consequences campaign – therefore, this will go some way to explaining the relatively stronger performance of that ad (and thus that campaign burst).

The 'Named Rider' Summer 2011 burst of activity was led by radio and supported by other ads including ads on petrol station screens, Video-on-Demand trailers and more general online display (also used at the launch of the campaign). Recognition of these other support ads are shown in Chart 3f, with varying bases.



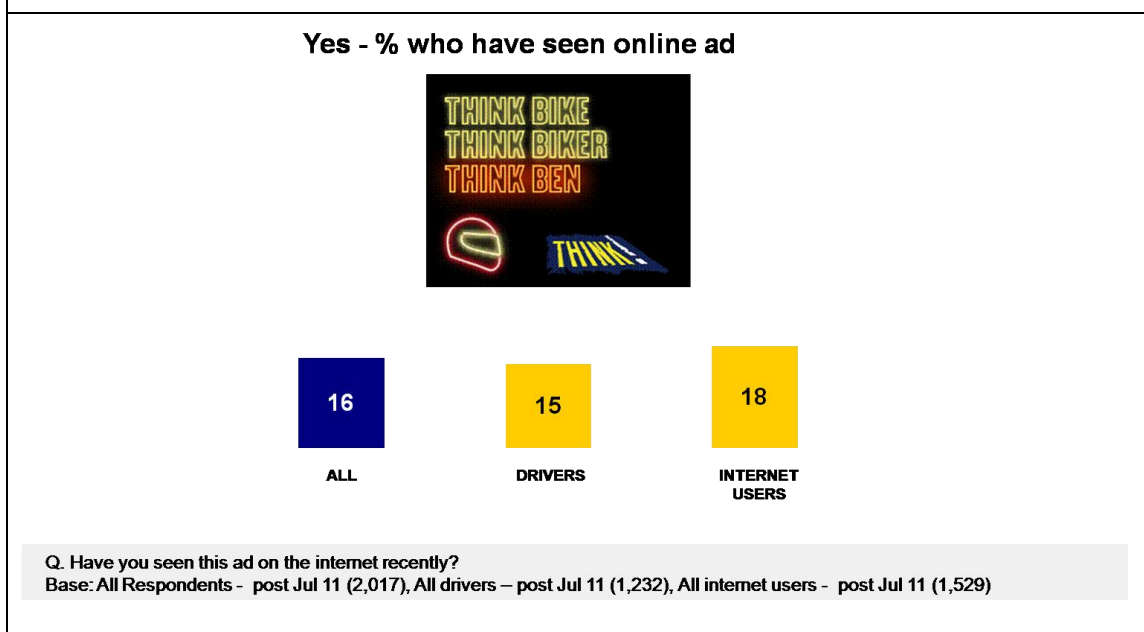
Four in ten of all adults (40%) recognised the petrol station ad shown for the first time at the 'Named Rider' Summer 2011 activity, which increased to 43% amongst drivers. This gained the highest recognition of the different campaign element, which was very positive given the relatively low spend for this element of the campaign. Among all adults those who were more likely to recognise this ad were men (43% compared with 37% of women) and those with family members or friends who are bikers (45% compared with 38% who do not).

Chart 3g: Recognition of Summer 2011 'Named Rider' – Video on Demand ad



A respectable proportion of one in three of those who actually use 'Video-on-Demand' services recognised the 'Named Rider' ad shown in this media (32%), possibly helped by the previous TV activity using the same creative. As for the petrol screen ads, this is the first time that these ads have been evaluated (in this particular media).

Chart 3h: Recognition of Summer 2011 'Named Rider' – online ad

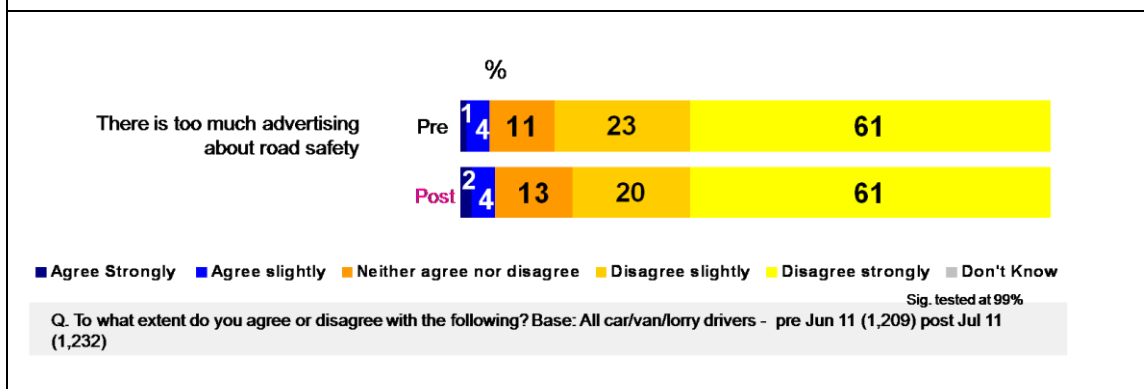


Sixteen percent of all adults (15% of drivers) recognised the screen grabs of the online display ads.

3.4 Attitude towards current amount of road safety advertising

In the THINK! Annual survey respondents are asked year on year about their attitudes towards the level of road safety advertising, to assess wear out and reactions to road safety activity in general. As the 'Named Rider' campaign had not been on screens for over a year (and given the short hiatus in activity experienced in 2010), it was interesting to ask their thoughts on the level of road safety advertising at this point in time.

Chart 3i: Agreement that there is too much advertising about road safety



Both prior to, and following, the 'Named Rider' Summer 2011 activity, just under one in twenty drivers agreed overall that there is 'too much advertising about road safety' (5% at the pre stage and 6% at the post stage).

Encouragingly, this is lower than those agreeing with this statement in the latest THINK annual survey in February this year (8%) and than in the years prior to 2010 (11%-14%), however it must be noted that the surrounding attitudinal measures asked at the same time as this attitude were slightly different in the Annual Survey compared with the 'Named Rider' survey.

Among all adults women were more likely than men to disagree with this statement (85% of women compared with 77% of men). Subgroups more likely to agree were: those aged between 16 and 24 (14% compare with 6% of those of other ages) and those from a non-white ethnic background (16% compared with 5% of those from white backgrounds).

Campaign awareness: **conclusions**

Following the Summer 2011 activity, an increased number of respondents could name a source in which they had seen or heard something about motorcyclists lately (from 8% before the campaign to 12% after), indicating awareness of the campaign. The most mentioned source being a radio ad (10%).

When asked to describe what they had seen or heard in the relevant campaign media, respondents were most likely to describe something which related to the main message of the latest burst of the THINK BIKER activity – that the 'motorcyclist was named or personalised/gave details of their lives' (31%). When compared with 2010 responses, these results indicate that the 'Named Rider' message is achieving cut through; there are fewer mentions relating to the previous 'How Close' campaign.

Upon prompting, 59% of drivers recognised at least one of the ads, a very respectable level given that the total recognition of the TV led 2010 campaign reached 66%. Radio ad awareness held strong from the 2010 campaign (34% of commercial radio listeners in 2011 compared with 31% in 2010) with cost per recognition being comparable despite not having the TV element which could have provided a boost to radio awareness previously. Petrol station and VOD ads performed well among the potentially exposed groups at 43% of drivers and 32% of those who watch TV online respectively (VOD possibly helped by previous TV activity). The petrol station ad recognition is particularly good given the reach relative to the spend, so may be a useful avenue to explore further.

Fewer respondents than seen before thought that there is too much advertising about road safety.

4 Campaign communication

This section looks at the main messages and feelings taken out from the motorcyclist road safety campaign, both spontaneous and prompted.

4.1 Communication of the 'Named Rider' radio ad

After being played the latest 'Named Rider' radio ad, all respondents were shown a series of communication statements, and asked which they felt reflected their feelings about the ad. In the past, communication statements have normally been asked only about TV ads as they were previously the lead creative for motorcycle safety campaigns with heaviest spend attached.

Table 4a shows agreement with these statements for all adults and broken down by key subgroups, including those who said they had previously heard the radio ad or something similar (recognisers), and those who had not previously heard the radio ad (non-recognisers). There were no significant differences by respondent gender.

Table 4a: Which of the following do you personally feel about the 'Named Rider' radio ad (prompted) - subgroups

	Total (2,017) %	All drivers (1,232) %	All non- drivers (785) %	Ages 17-29 (383) %	Ages 30+ (1,602) %	ABC1 (873) %	C2DE (1,144) %	Recog nisers of radio ad (448) %	Non- recognis ers of radio ad (1,569) %
It sticks in my mind	25	26	25	30	24	23	28	44	20
I found it confusing	16	15	18	15	17	18	14	8	19
This ad made me think I should take longer to look for motorcyclists	12	14	9	16	11	14	10	17	11
The ad has prompted me to take more notice of the people riding motorcycles	12	14	9	13	12	14	11	17	11
The ad has made me feel more empathy towards motorcyclists	11	12	9	13	11	13	10	20	9
It made me think	10	14	3	7	11	10	10	16	9

about my own driving									
It is aimed at people like me	8	11	1	7	8	9	7	12	7
It made ME drive more carefully	7	8	4	7	7	6	8	8	6
It told me something new	6	4	12	9	5	5	8	6	7
I found it irritating	6	7	6	5	7	8	5	2	8
It is the sort of ad I would talk about with other people	4	4	5	8	4	4	5	8	4
I found it shocking	2	1	3	2	2	1	2	1	2
None	10	10	9	8	10	10	9	6	11
Don't Know	7	5	11	5	7	5	9	2	8

The shading indicates significant differences seen between adjacent subgroups.

One quarter of adults (25% and 26% of drivers) stated that the ad would stick in their minds; a key measure of cut through. This is a similar level of cut through achieved on the latest wave of the Drink Drive radio ad ('Story', 23%) although, as would be expected, is lower than the level found for the 'Named Rider' TV ad in 2010 (40%). Those recognising the radio ad were more likely to say the ad would stick in their minds than those who did not recognise the ad (44% compared with 20%).

The second most common response, selected by 16% of adults and 15% of drivers, was that the ad was confusing. Those who recognised the radio ad before the interview were less likely to say this (8% compared with 19% of those who didn't recognise the ad) which suggests that the confusion comes on first listening but decreases with familiarity, which was also highlighted in the qualitative creative development research. As a comparison, only two per cent of adults found the Drink Drive 'Story' radio ad confusing.

A smaller proportion said they found the ad irritating (6% of adults and 7% of drivers) with ABC1s more likely to say this than C2DEs (8% compared with 5%), and recognisers were less likely to say this (2% compared with 8% of non-recognisers). Very few adults found the ad shocking (2%), as would be expected given the ad was not designed to shock. Non-drivers were more likely to say this than drivers (3% compared with 1%)

Considering more general driving attitudes and behaviours; one in ten adults (10%) agreed the ad made them think about their own driving with higher agreement amongst those aged 30 or more (11% compared with 7% of those aged 17-29) and those recognising the ad (16% compared with 9% of non-recognisers). Seven percent of adults said that the ad had made them drive more

carefully. Drivers were more likely to agree with both these statements (14% for both).

With regard to attitudes and behaviours towards motorcyclists; one in ten (11%) said the ad had made them feel more empathy towards motorcyclists whilst similar proportions said the ad had made them think they should take longer to look for motorcyclists (12%) and take more notice of the people riding motorcycles (12%). Understandably, drivers were more likely than non-drivers to agree with the latter two statements (14% compared with 9% for both statements), as were recognisers (17% compared with 11 % of non-recognisers, for both statements).

In April 2010, respondents were asked a similar set of communication statements in regards to the TV ad. In general, viewers of the TV ad in 2010 were much more likely to say each of these statements than those who listened to the radio ad in 2011. A quarter in 2010 said that the TV ad had made them feel more empathy towards motorcyclists (24%), compared with 11% saying that the radio ad had done so in 2011. The TV ad also performed better in terms of causing people to think they should take longer to look for motorcyclists and to take more notice of people riding motorcycles.

In terms of targeting, 11% of drivers, the ad's target, said they felt the ad was aimed at someone like them, compared with 1% of non-drivers and 8% of all adults. This is a measure that tends to be relatively low in road safety advertising as people do not identify themselves with dangerous drivers and this figure is not surprising in this context. Those recognising the ad were more likely to say the ad was aimed at them (12% compared with 7% of non-recognisers), as were white respondents (8% compared with 4% of respondents from a non-white ethnic background).

Around one in twenty said the ad told them something new (6%), although non-drivers were more likely to agree to this (12% compared with 4% of drivers) as were C2DEs (8% compared with 5%) and those from a non-white ethnic background (15% compared with 5% of white respondents).

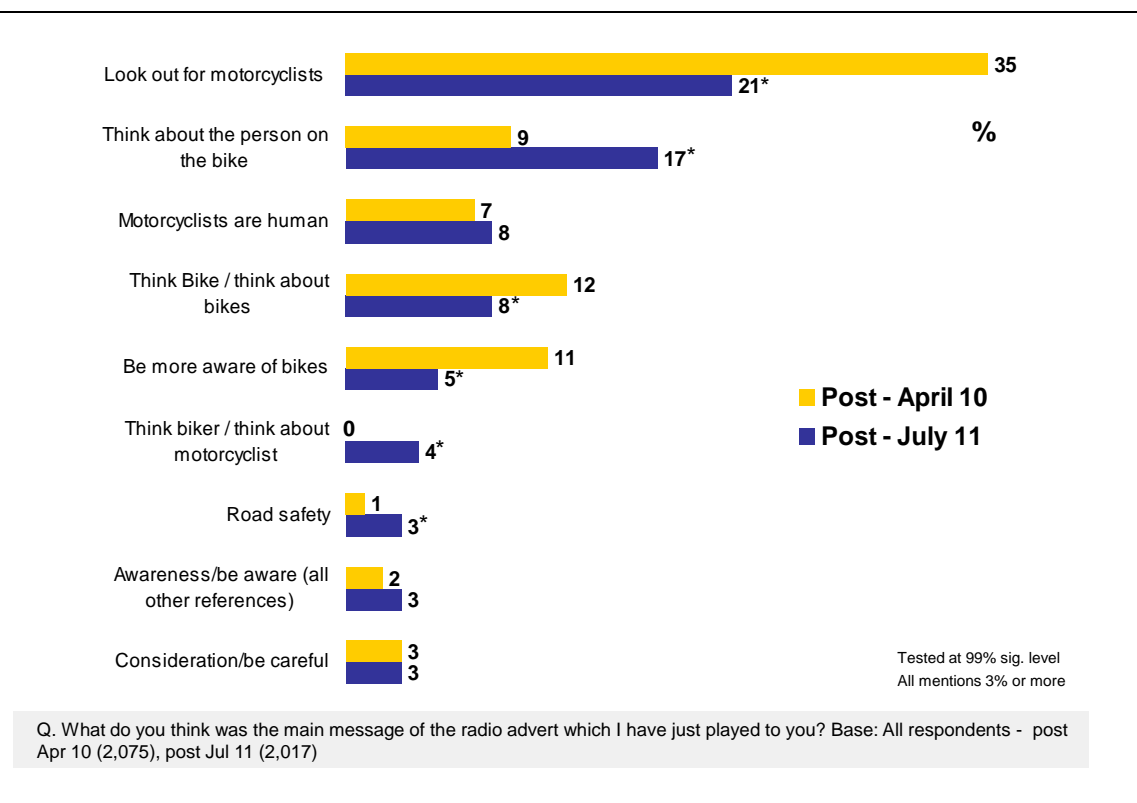
Linked with engagement is whether the ad is likely to be discussed with other people. Around one in twenty adults said they would talk about it with others (4%) with recognisers and those aged 17-29 years being more likely to do so (both 8%).

Messages communicated by the 'Named Rider' radio ad

After being played the 'Named Rider' radio ad, respondents were asked to describe what they thought the main message of the ad was. Verbatim responses were then coded, and those given by 3% or more of respondents are shown in Chart 4b. The responses given to this question for the March 2010 ad have been included for comparative purposes, but it should be noted that the creatives for the two radio ads were slightly different (although the main message of biker personalisation was the same). The same data is shown visually in a word cloud below, with the size of the text representing frequency of mention.



Chart 4a: Main message understood from 'Named Rider' radio ad (spontaneous)



The most frequently cited main message for the radio ad was simply to 'look out for motorcyclists', mentioned by one in five respondents (21% for all adults and drivers), but respondents were less likely to say this than they were in 2010.

Seventeen per cent of adults (and 23% of drivers) picked up on the more detailed personalisation message saying that you should 'think about the person on the bike', double the proportion who cited this in response to the campaign launch March 2010. Just under one in ten thought the main message was that 'motorcyclists are human / people' (8% of adults and 10% of drivers). Again, this is encouraging as personalisation of motorcyclists is a core campaign message.

The message 'Think Bike/ think about bikes' was mentioned by 8%, slightly less than in 2010, while 4% mentioned 'Think Biker/ think about motorcyclist' (a variation of the campaign strapline). Five percent of adults thought the main message was to generally 'be more aware of motorbikes' (half the proportion mentioning this in March 2010).

One in ten adults said they did not know what the main message of the ads was, or could not describe it (11%), less than the 15% who said this in 2010.

Whilst those aged 17-29 and C2DEs were more likely to give the message 'look out for motorcyclists' in 2010, this pattern was not maintained in 2011.

In 2011, ABC1s were more likely than C2DEs to give more specific responses about personalising motorcyclists, with 20% citing that the main message was to 'think about the person on the bike' and 9% mentioning 'motorcyclists are human / people' (compared with 13% and 5% of C2DEs respectively), as were white respondents when compared with those from a black or minority ethnic background. These differences are all in line with what was seen in 2010. Those with children in the household were more likely than those without to say the main message was 'think about the person on the bike' (22% compared with 15%).

Respondents from black or minority ethnic groups were more likely to mention non-specific road safety messages in relation to the radio ad, with 9% describing the main message it to be 'consideration/ be careful' and 7% saying it had a generic message of 'road safety' (compared with 3% and 2% of white respondents respectively). Non-drivers were also more likely to cite 'consideration/ be careful' as the main message than drivers (6% compared with 2%).

Campaign communication: conclusions

The most frequently cited main message for the radio ad was to 'look out for motorcyclists' (21%), with a significant proportion picking up on the core campaign personalisation message, saying that you should 'think about the person on the bike' (increased to 17% from 9% in 2010) and some that 'motorcyclists are human / people' (8%).

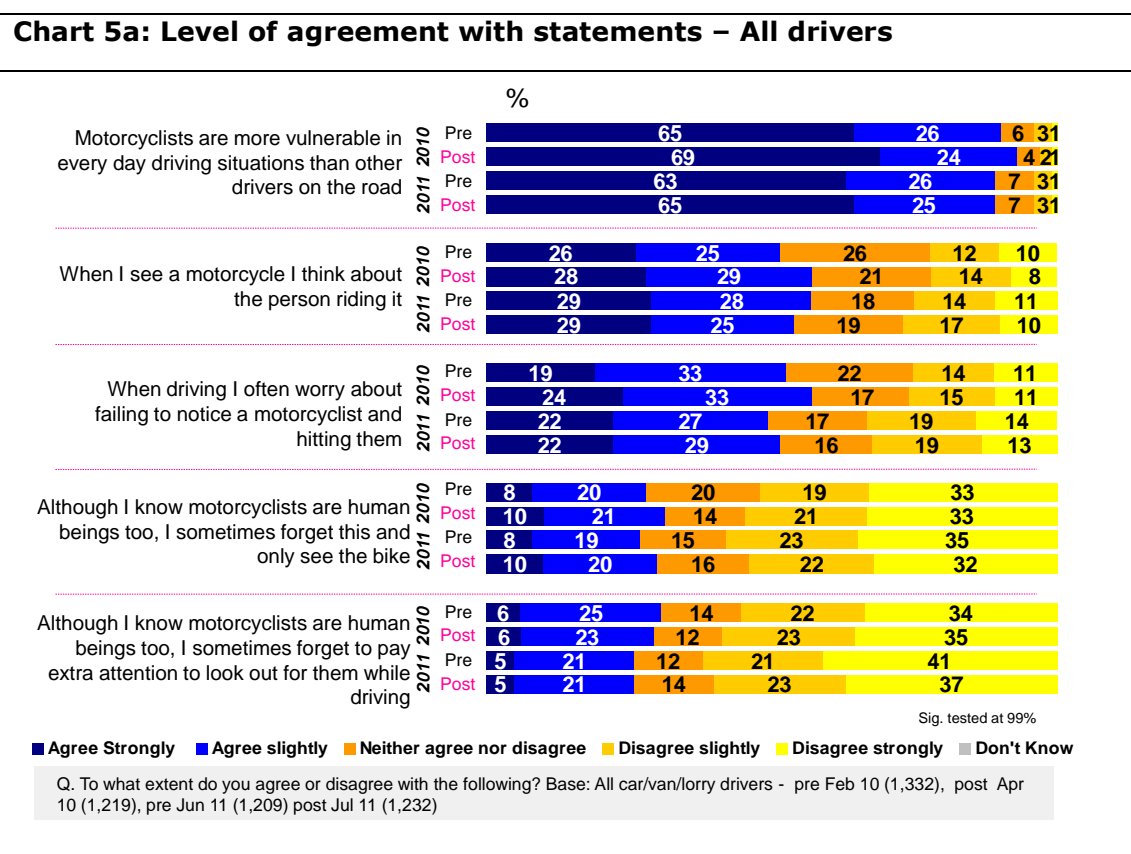
The most common response cited about the radio ad was that it stuck in peoples' mind (25%), although this was followed by the belief that the ad was confusing (16%), indicating awareness, but perhaps a lack of engagement. However responses from those who recognised the radio ad were generally more positive and less likely to find it confusing than those who did not suggesting that the repeated exposure helped in comprehension and engagement. This confirmed the findings of the pre-campaign qualitative research.

5 Impact on attitudes towards motorcycle road safety

This section looks at attitudes towards motorcyclist road safety and presents a more detailed examination of road usage behaviour including level of agreement with a series of statements aimed at gauging the general level of driver awareness of motorcyclists while driving and how this has changed, if at all, since the launch of the 'Named Rider' motorcycle campaign.

5.1 Driver awareness of motorcyclists while driving

All drivers were asked their level of agreement with a series of statements regarding their awareness of motorcyclists while driving. Each statement was crafted to specifically address the theme of the THINK motorcyclist campaign, namely that drivers need to look out for motorcyclists and remember the person riding the bike, so were asked for the first time at the 2010 pre stage.



At both the pre and post stages in 2011, there was overwhelming agreement amongst drivers with the statement that motorcyclists are more vulnerable in every day driving situations than other drivers on the road (almost 90% agreement at both stages), with two thirds of drivers strongly agreeing (65% at the post stage). Although there was a slight increase in strong agreement between the pre and post stage in 2010, in the 2011 pre stage there was a slight

fall in overall agreement. At the 2011 post stage this level of agreement returned to the level seen in 2010.

Drivers over the age of 30 were more likely to agree strongly with this statement (67%) than drivers aged 17 to 29 (47%). A similar pattern was identified at the pre stage, and in 2010. There was no growth in the proportion of drivers aged 17-29 who agreed strongly with this statement. Drivers from a white ethnic background were more likely to agree strongly that motorcyclists are more vulnerable in every day driving situations than other drivers on the road (66% compared to 41% of those from a non-white ethnic background). This difference had previously been evident at the 2010 pre stage, although there was no longer any difference between to these groups the 2010 post or 2011 pre stage.

Over half of drivers (54% at the post stage) also agreed that when they see a motorcycle they think about the person riding it. This level increased pre to post campaign in 2010, and then remained consistent in 2011. One in three of these drivers (29%) agreed strongly. Male drivers aged between 45 and 54 were more likely to strongly agree with this statement (41%) than men or women of other age groups as were those who know someone who rides a motorcycle (36% compared with 26% of those who know no one who rides a motorcycle). Drivers from lower social grades were more likely to agree with this statement than those from higher social grades (59% of C2DEs compared with 51% of ABC1s) although they were no more likely to strongly agree.

At the 2011 campaign post stage, half of all drivers agreed that when driving, they often worry about failing to notice a motorcyclist and hitting them (51%). In 2010, those most likely to agree with this statement were drivers from a non-white ethnic background, but there was no longer any significant difference by ethnic background in 2011.

A third of drivers (30%) agreed that although they know motorcyclists are human beings too, they sometimes forget this and only see the bike. Drivers from social grade ABC1 were significantly more likely to disagree with this (57% compared with 50% of those from social grades C2DE).

At the 2011 pre stage, drivers who felt that the responsibility for reducing road accidents with motorcyclists lies primarily with the motorcyclists themselves were more likely to agree that they sometimes forget that motorcyclists are human beings too (36% compared to with 20% of those who felt the responsibility for reducing road accidents with motorcyclists lies primarily with drivers themselves). However, at the post stage this difference was no longer apparent

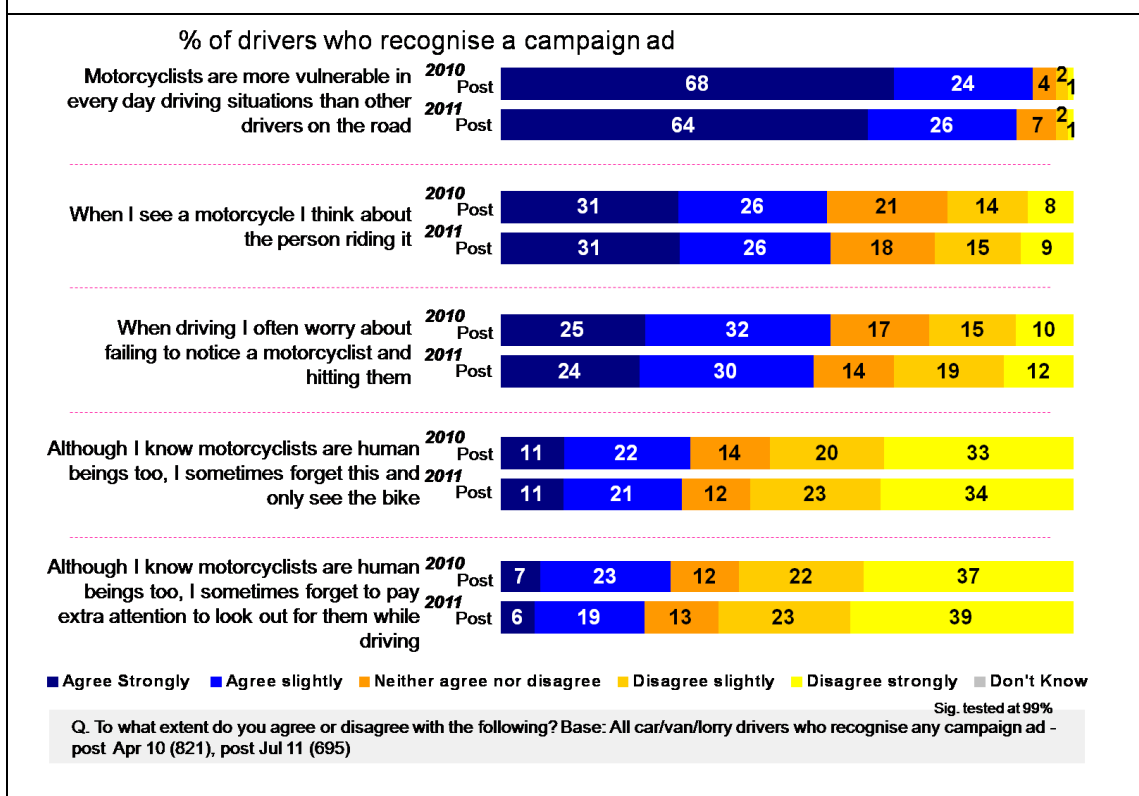
In 2010, drivers from a non-white ethnic background were more likely to agree that they 'sometimes forget to see the rider and only see the bike' (compared

with drivers from a white ethnic background), but, again, there was no difference in agreement between these groups in 2011.

In 2011, a quarter of drivers admitted that 'although they know motorcyclists are human beings too, they sometimes forget to pay extra attention to look out for them while driving' (26%), consistent with the pre-stage and 2010 levels. There were no sub groups which were more likely than average to agree with this statement.

Agreement was higher for some statements among those who had previously seen one or more of the campaign ads, indicating that repeated exposure could increase effectiveness, although it could also reflect those who are more aware of motorcyclists noticing advertising with this subject matter.

Chart 5b: Level of agreement with statements – All drivers who recognised one or more of the campaign ads



Those who recognised any of the advertising about road safety relating to motorcyclists used in the 'Named Rider' campaign from before being shown it in the interview were significantly more likely to agree strongly that when they see a motorcycle they think about the person riding it (31%) compared to those who did not recognise any of the advertising (26%).

Those who recognised a campaign ad were also more likely to agree that when driving they often worry about failing to notice a motorcyclist and hitting them

(55% compared with 47% of non-recognisers), although they were no more likely to strongly agree with this.

Impact on attitudes toward motorcyclist road safety: conclusions

There is still a tension apparent in attitudes towards motorcyclist road safety. The level of agreement that motorcyclists are vulnerable remains high (90%), while relatively low numbers of drivers still admit that 'although they know motorcyclists are human beings too they sometimes forget this and only see the bike' (30%) and that they 'sometimes forget to pay extra attention to look out for them while driving' (26%) so they may not be relating the dangerous behaviour to their own driving.

There were no significant changes seen in these attitudes following the 2011 campaign burst although those that recognised the campaign ads from prior to the interview were more likely to agree that they think about the person riding the motorcycle and that they worry about hitting them, which may either reflect the effectiveness of the campaign or that people with a heightened awareness of motorcyclist safety are more likely to notice advertising on the subject.

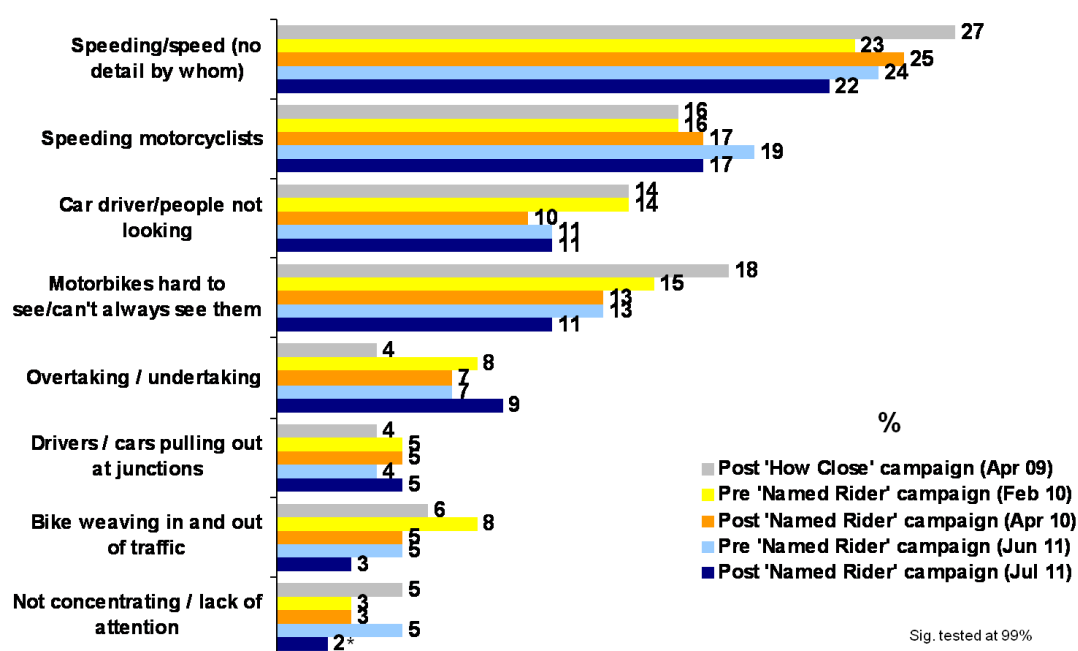
6 Perceptions and behaviour relating to motorcycle accidents

This section examines driver behaviour with regards to motorcyclists by exploring the most common perceived causes of motorcycle accidents (using spontaneous and prompted measures), the precautions taken to avoid motorcycle accidents and by looking at where the responsibility for reducing accidents with motorcyclists is believed to lie.

6.1 Common causes of motorcycle accidents

Respondents were asked about what they thought was the most common cause of motorcycle accidents, both spontaneously and then prompted using a list. Chart 6a below looks at the spontaneous responses for all respondents for the Summer 2011 activity, compared with the launch of the campaign in 2010, and the last evaluation of the previous motorcycle campaign evaluation 'How Close' conducted in April 2009. Chart 6b shows the results for drivers only.

Chart 6a: Most common cause of motorcycle accidents (spontaneous) – All adults



Q. What would you say is the most common cause of motorcycle accidents? Base: All Respondents – 'How Close' post, Apr 09 (1,994), 'Named Rider' pre Feb 10 (2,165), post Apr 10 (2,075), pre Jun 11 (2,043) post Jul 11 (2,017)

When respondents were asked what they thought was the most common cause of motorcycle accidents, three key themes emerged: speed, visibility and reckless or careless driving. Consistent with the pre-stage and with the results found before

and after the 2010 campaign execution, the general mention of 'speeding (no detail of by whom)' (22%) was the primary response given by respondents to this question. Those who were more likely than average to mention speeding as the most common cause of accidents included those over the age of 55 (27% compared with 20% of under 55s) and. Interestingly, those who had not seen motorcycles advertising in any of the media sources used in the 'Named Rider' campaign were more likely to mention speeding (23% compared with 16% of those who have seen motorcycles advertising in any of the media sources used in the campaign).

Those who did not recognise any ads from the 'Named Rider' campaign were also more likely to mention speeding (27% compared with 19% of those who recognised an ad). Recognisers of the ads were more likely to say that the most common cause of motorcycle accidents is car drivers/ people not looking (14% compared with 8% of those who did not recognise the ads).

Those who thought that the responsibility of reducing accidents mainly lies with the motorcyclist were more likely to mention both speeding (25% compared with 16% who thought the responsibility was mainly car drivers) and speeding motorcyclists in particular, given by 26% of this group compared with 8% of those who thought responsibility lies with car drivers, suggesting a certain degree of blame towards motorcyclists from this group. Speeding motorcyclists was the second most frequently mentioned answer, by 17% of all adults.

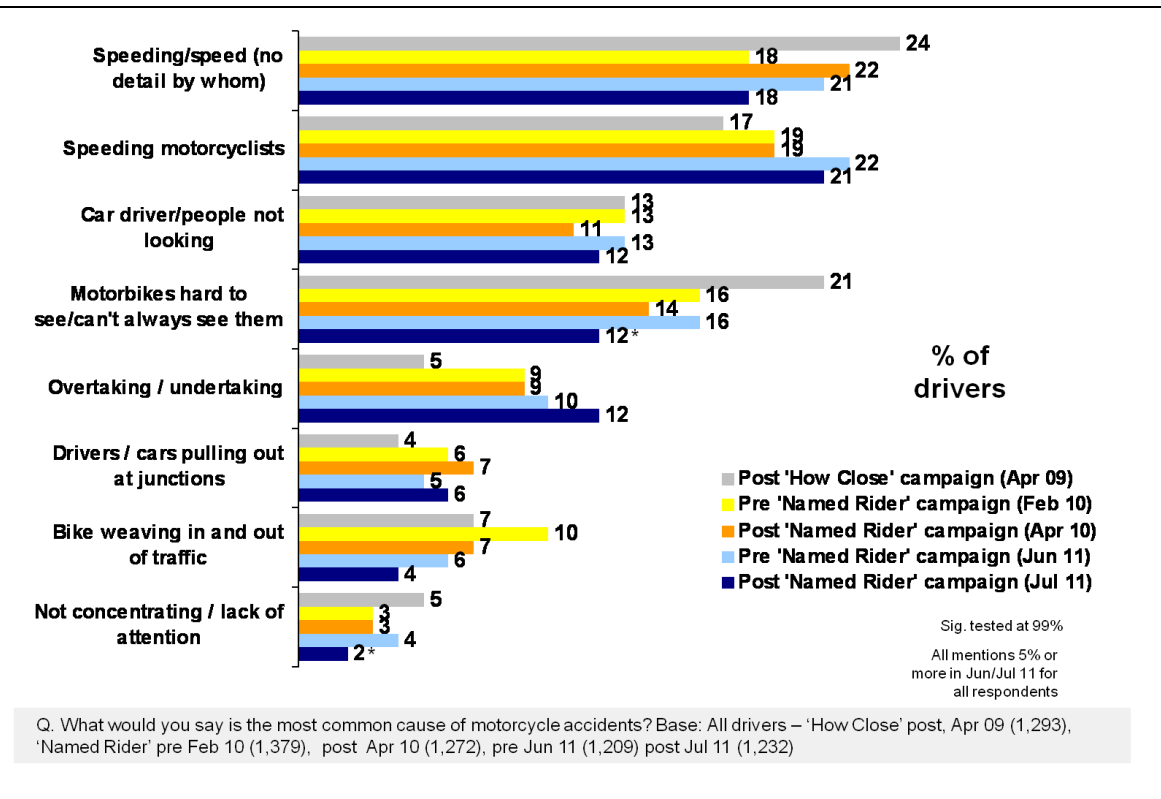
Other respondent groups more likely to mention speeding motorcyclists were those from social grades ABC1 (19% compared with 14% of C2DEs) and those over the age of 45 (21% compared with 12% of those under 45).

The next most common causes of motorcycle accidents included 'car driver/people not looking' (11%) and 'motorbike hard to see/can't always see them' (11%), both of which were more frequently mentioned by adults who thought that the onus on reducing accidents with motorcyclists should mostly be on car drivers. This theme of visibility touches upon the main message of previous motorcycle road safety advertising, namely the need for car drivers to pay extra attention to look for bikes. Although mentions of motorbikes being hard to see have gradually fallen from 2009 (18%) to 11% in July 2011, this is not surprising as the latest campaign does not emphasise this point as directly as previous campaigns did. Despite this, it is notable that respondents who recalled seeing an ad in the most recent campaign were more likely to mention 'car driver/ people not looking' (14%) compared to those who had not seen the advertising (8%).

Other perceived causes recorded at the latest wave included several along the theme of reckless or careless driving. One in ten adults mentioned 'overtaking/undertaking' (9%) and just under one in twenty mentioned bikes weaving in and

out of traffic or a lack of attention (3%). A handful mentioned a lack of attention as being a cause (2%, the lowest level seen yet).

Chart 6b: Most common cause of motorcycle accidents (spontaneous) – All drivers



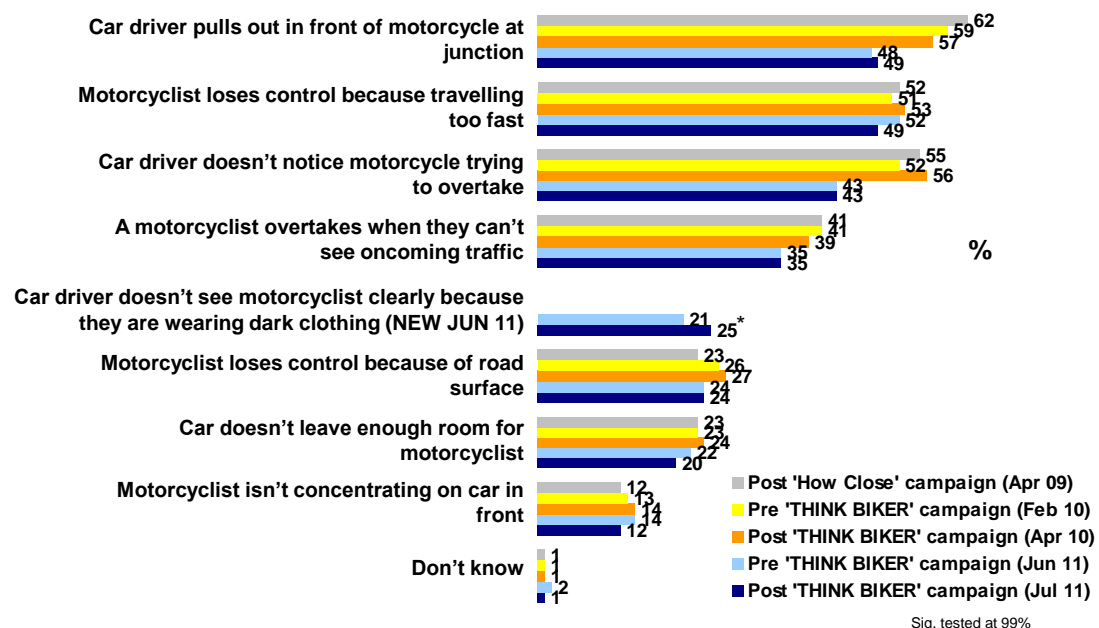
As to be expected, there were a number of significant differences between drivers and non drivers in their views of the most common causes of motorbike accidents. Most notably, drivers were significantly more likely to mention 'speeding motorcyclist' (21% compared with 9% of non- drivers), 'motorbikes are hard to see' (12% compared with 8%), 'overtaking/ undertaking' (12% compared with 4%) and 'drivers pulling out at junctions' (6% compared with 2% of non drivers). With the exception of speeding motorcyclists, these findings suggest that drivers display a greater awareness than non drivers of how the behaviour of car/van drivers can lead to an accident involving a motorcyclist. Non-drivers were more likely to give the less specific response of 'speeding' (30% compared with 18% of drivers).

The proportion of drivers thinking that the most common cause is that motorbikes are hard to see fell between the pre stage (June 2011) and the post stage (July 2011), from 16% to 12%. The proportion thinking that the main cause of accidents is a lack of attention also fell (from 4% to 2%).

Respondents were then asked from a prompted list, which three things they considered to be the most common cause of motorcycle accidents. Chart 6c below

looks at the responses for Summer 2011 activity, compared with the responses recorded at the initial launch of the campaign in 2010 and those recorded at the previous motorcycles campaign evaluation in April 2009. Chart 6d shows the responses for drivers only. It should be noted that the statement 'a car driver doesn't see a motorcyclist clearly because they are wearing dark clothing' was added as a response option at the pre stage in June 2011, and respondents were still only able to select three reasons. As a result of this, the results between 2010 and 2011 are not directly comparable.

Chart 6c: Most common cause of motorcycle accidents – Top three (prompted) – All adults



Q. Which three of the following statements would you say are the most common causes of motorcycle accidents? Base: All Respondents – 'How Close' post, Apr 09 (1,994), 'Named Rider' pre Feb 10 (2,165), post Apr 10 (2,075), pre Jun 11 (2,043) post Jul 11 (2,017)

Overall the top four causes of motorcycle accidents have remained unchanged since February 2010, prior to the launch of the 'Named Rider' campaign. Amongst these top four responses two key themes have emerged: driver awareness and reckless motorcyclist behaviour. Consistent with the findings from 2009 and 2010, a 'car driver pulling out in front of a motorcyclist at a junction' was one of the two most common responses, with half of adults choosing this at the latest wave (49%, stable from the 2011 pre stage). This is a key visual from the previous 'How Close' campaign. Junctions were mentioned as a cause by only a small number of respondents when asked spontaneously, likely reflecting that this cause is not top of mind, but that when prompted they remember this, probably in reference to the previous 'How Close' advertising. Those who were more likely to choose this as the most common cause of motorcycle accidents included: men (55% compared with 44% of women), those aged 30-44 (52%),

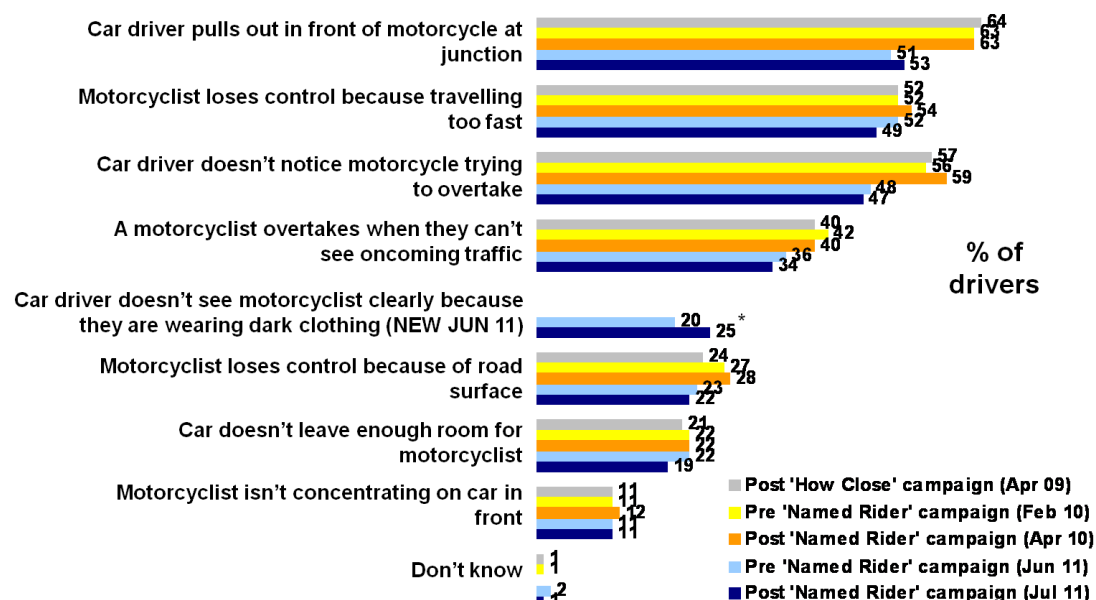
those from higher social grades (52% of ABC1s compared with 46% of C2DEs), those who had seen motorcycle advertising in any media source used in the 'Named Rider' campaign (63% compared with 47% of those who had not seen advertising in these media sources) and those who recognised any of the 'Named Rider' campaign ads (55% compared with 43% of those who had not seen advertising). Those from a non-white ethnic background were less likely to choose this as a common cause of accidents (29% compared with 52% of those from a white ethnic background).

The other most common response was a 'motorcyclist loses control because they are travelling too fast', with 49% of adults choosing this option (again, stable from the pre stage). Those groups more likely to think this were women (52% compared with 46% of men), those aged over 45, those from non white ethnic backgrounds (62% compared with 47% of those from a white ethnic background) and those who believe that the responsibility for reducing motorcycle accidents lies with motorcyclists.

The third most common response to this question was a 'car driver doesn't notice a motorcycle trying to overtake', with 43% of adults selecting this (stable from the pre stage). Those who were more likely than the average to choose this option included those in social grades ABC1 (46% compared with 40% of C2DEs), those from a white ethnic background (45% compared with 32% of those from a non white ethnic background), and those who have a friend or family member that rides a motorcycle (50% compared with 41% of those who know no motorcyclists). Those who had seen motorcycles advertising in the any of the campaign media sources and those who recognised 'Named Rider' ad were also more likely to select this statement. This was followed in fourth place by 'a motorcyclist overtakes when they can't see oncoming traffic', as chosen by 35% of adults.

A quarter of adults answered that the most common cause is that a 'car driver doesn't see a motorcyclist clearly because they are wearing dark clothing' – a new cause added in 2011. This was the only cause to see a shift between the 2011 pre stage and post stage (from 21% in June 2011). There were no notable differences among sub groups in likelihood of thinking this is the most common cause of accidents.

Chart 6d: Most common cause of motorcycle accidents – Top three (prompted) – All drivers



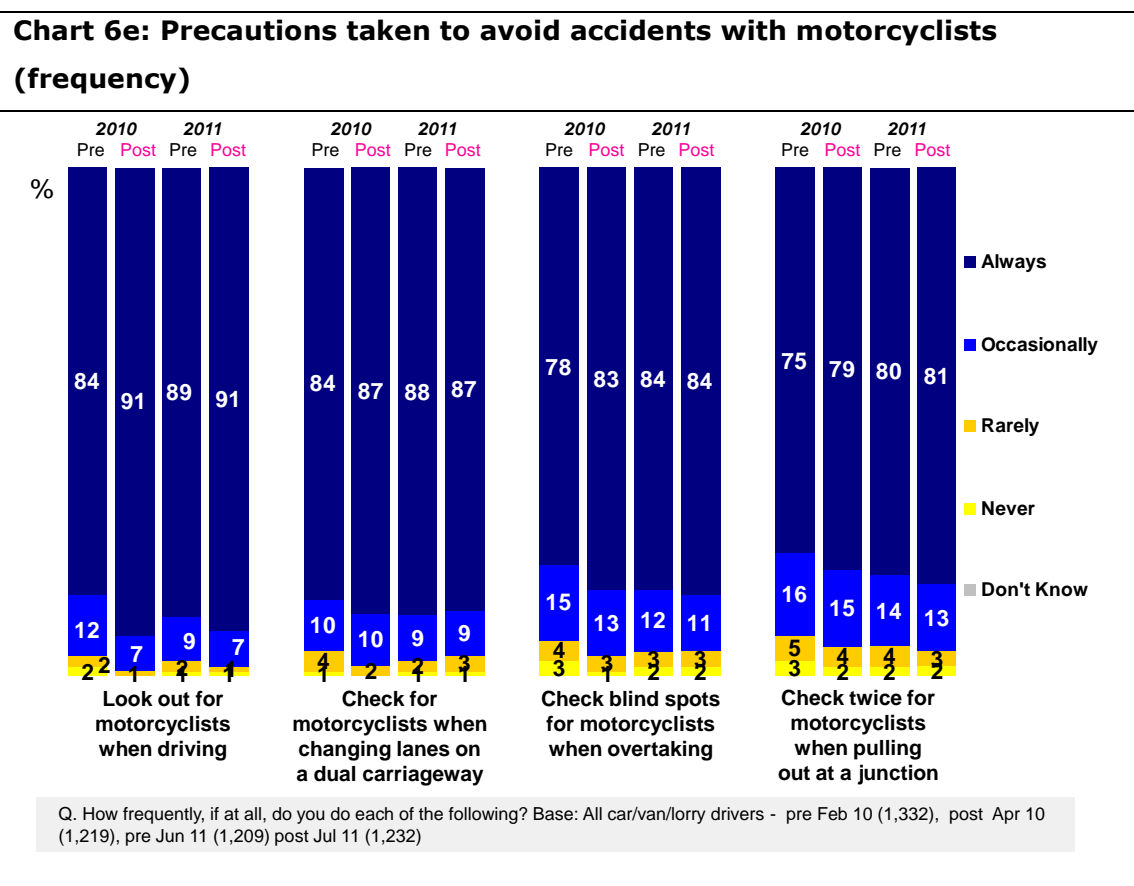
Q. Which three of the following statements would you say are the most common causes of motorcycle accidents? Base: All drivers – 'How Close' post, Apr 09 (1,293), 'Named Rider' pre Feb 10 (1,379), post Apr 10 (1,272), pre Jun 11 (1,209) post Jul 11 (1,232)

Drivers were more likely than non drivers to state that the most common cause of motorcycle accidents is a car driving pulling out in front of a motorcycle at a junction (53% compared with 42% of non drivers), a car driver not noticing a motorcycle trying to overtake them (47% compared with 27%). Non drivers were more likely to think that a motorcyclist losing control because of the road surface (27% compared with 22% of drivers) was a common cause.

As for all adults, the only shift in proportion was for 'car driver doesn't see a motorcyclist clearly because they are wearing dark clothing', with 25% of drivers thinking this a main cause at the post stage compared with 20% at the pre stage.

6.2 Precautions taken to avoid accidents with motorcyclists

The following chart shows the frequency with which drivers take various precautions to avoid having an accident with a motorcyclist. This question was first asked at the 2010 pre stage.



Of the driving behaviours shown, drivers say they most frequently 'look out for motorcycles when driving'. At the 2011 post stage, nine in ten (91%) said that they *always* take this precaution. This is consistent with the post stage in 2010, maintaining the significant increase following the initial campaign launch. Amongst sub-groups, those aged between 16 and 24 were least likely to do this (77% claimed to always do this). Those who had seen motorcycles advertising in a campaign source were more likely to claim to do this (95% always did this, compared with 90% who had not seen motorcycles advertising).

Nearly nine in ten drivers (87%) claim they *always* 'check for motorcyclists when changing lanes on a dual carriageway', with mentions of this remaining stable from 2010 (prior to the introduction of the campaign). Those who had seen motorcycles advertising in a campaign source were again more likely to claim to do this (89% always did this, compared with 83% who had not seen motorcycles advertising).

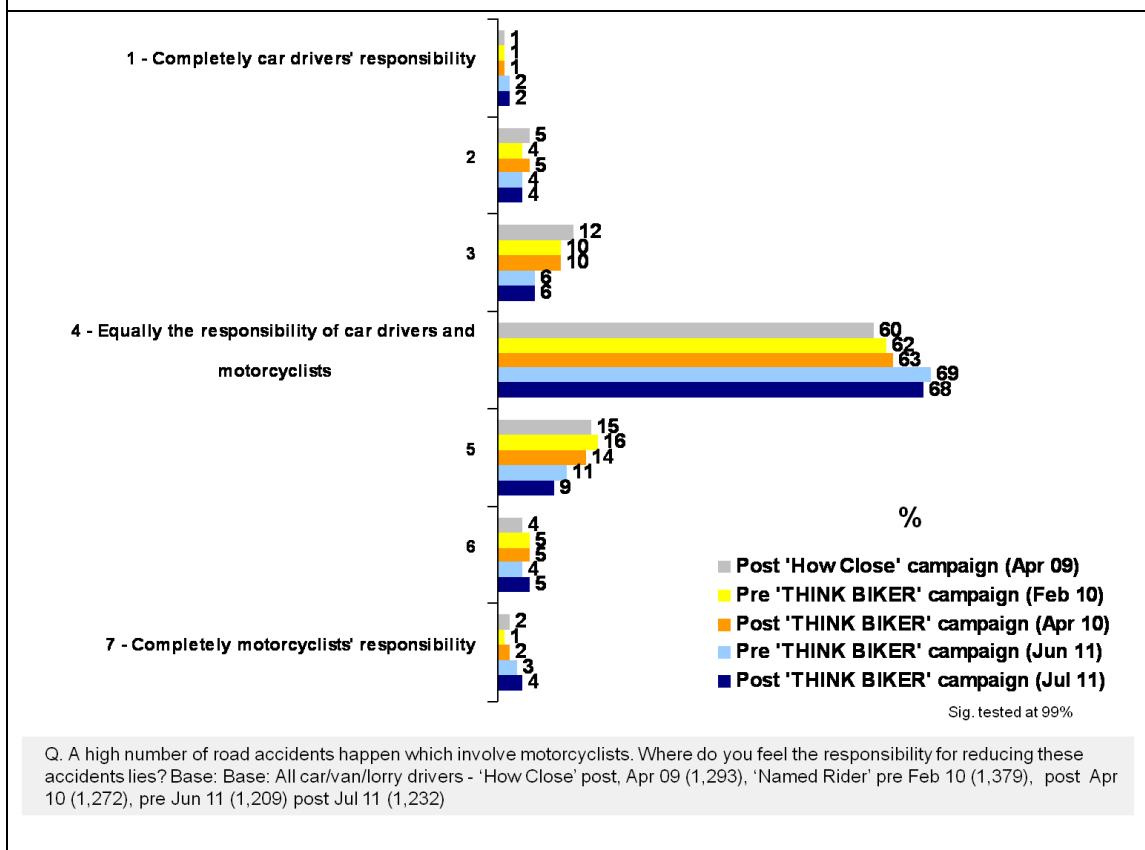
Over eight in ten drivers (84%) claim to *always* 'check blind spots for motorcyclists when overtaking'. In 2010, the proportion claiming to always do this increased significantly from pre to post, and this increase remained stable in 2011. Those who recognise an ad from the campaign were more likely to say that they always take this precaution (87% compared with 81%).

Eight in ten drivers (81%) *always* 'check twice for motorcyclists when pulling out at junctions' (on a par with the levels seen 2010). Again, those aged 16 to 24 were least likely to say that they always do this. Those who think that the responsibility for reducing accidents involving motorcyclists (Section 6.3) lies mostly with the car driver were more likely to say that they always check for motorcyclists (86%), than those who believe responsibility lies with the motorcyclist (76%).

6.3 Responsibility for reducing accidents

Respondents were asked to give an answer on a scale of 1-7 indicating where they place the onus of responsibility for reducing accidents involving motorcyclists. Chart 6d below shows the responses given by car/ van/ lorry drivers.

Chart 6f: Where feel responsibility for reducing accidents involving motorcyclists lies



Both before and after the 2011 campaign, seven in ten drivers indicated that they felt the responsibility for reducing accidents with motorcyclists lies equally with car drivers and with motorcyclists. This was a significant increase from 2010.

This change may have been led by an increase in young males aged 17 to 29 believing that responsibility is equal (73% compared with 50% in 2010). At the 2010 post stage, young males (a target group of THINK! road safety campaigns) were less likely than adults generally to indicate that responsibility lies equally with car drivers and motorcyclists, being more likely to think that the responsibility lies with motorcyclists themselves. In 2011, this difference was no longer apparent.

Among adults generally, those who recognised an ad used in the motorcycles campaign at the post stage were more likely to say that responsibility is equal (72%) compared with those who had not seen an ad (66%), while those who did not recognise a campaign ad were more likely to say that it is the motorcyclist's responsibility (20% answering 5 to 7, compared with 15% who recognised an ad).

In April 2009, as well as 2010, women were more likely than men to think that car drivers and motorcyclists are equally responsible while men were more likely than women to place the responsibility on car drivers. In 2011, both at the pre and post stage, there was no longer any difference between the responses given by men and women.

Impact on driver behaviour with regards to motorcyclists: conclusions

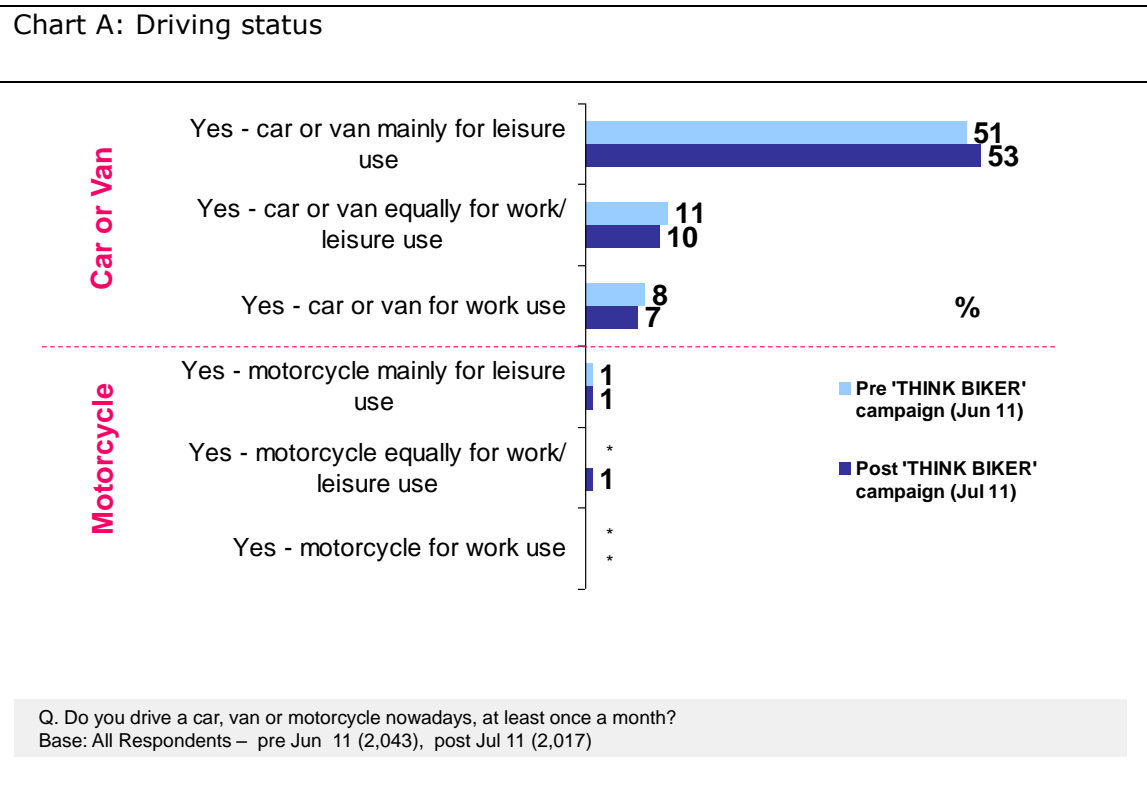
When respondents were asked to give a spontaneous answer, speeding was thought to be the most common cause of accidents involving motorcyclists (39%), with other themes arising of visibility issues and careless driving. Once presented with a range of possible causes, a car driver pulling out in front of a motorcyclist at a junction or a motorcyclist losing control because they are travelling too fast (both 49%) were considered to be amongst the top three causes of motorcycle accidents.

The majority of drivers claim to always take precautions to avoid accidents with motorcyclists (from 8 to 9 in 10 for a range of precautions). The results at the 2011 post stage showed no significant differences to those found in 2010, unsurprising given the high starting position.

The majority of respondents indicated that they felt car drivers and motorcyclists are equally responsible for reducing motorcycle accidents – with the proportion doing so increased significantly between the 2010 post stage and 2011 pre stage.

Appendix A: Sample Profile

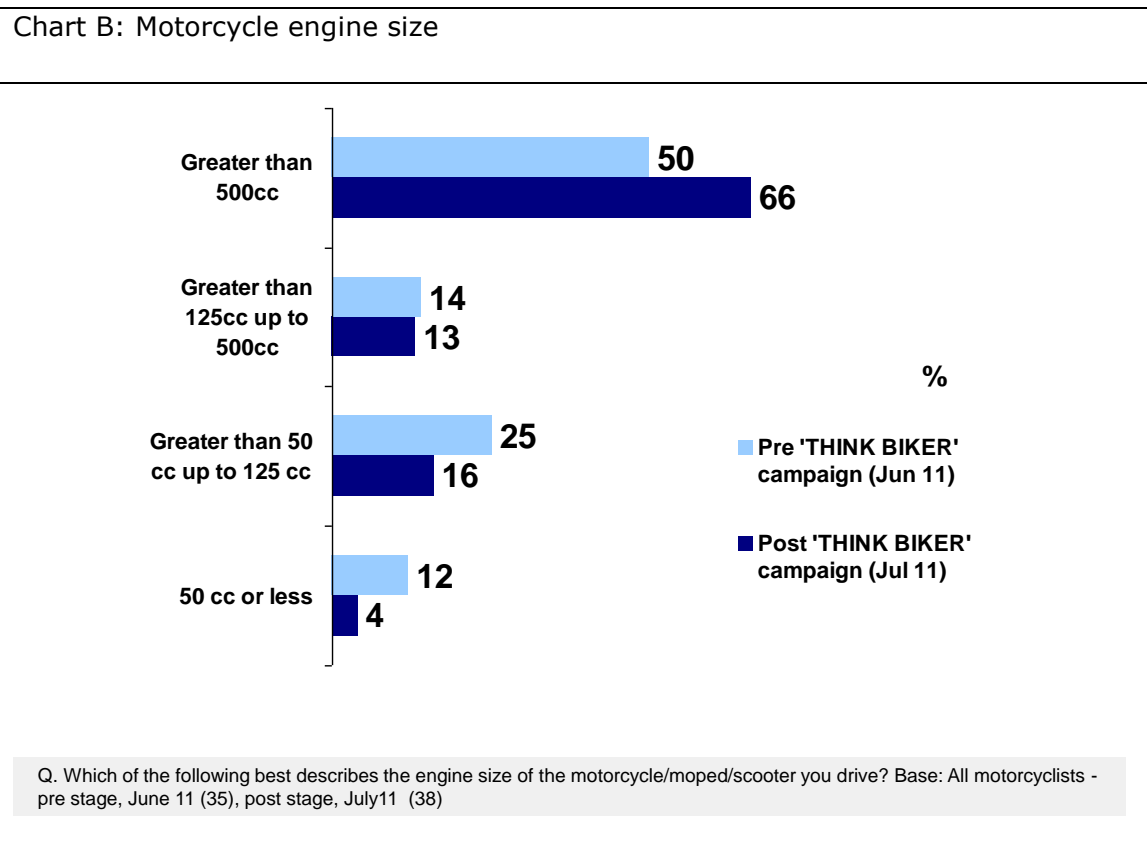
Chart A shows the proportion of respondents who drove a car/van or motorcycle at least once a month and whether this was for leisure or business purposes.



Around half (53% at the post stage) drove a car or van mainly for leisure use, while 10% drove a car or van equally for work and leisure use and 7% drove a car or van mainly for work.

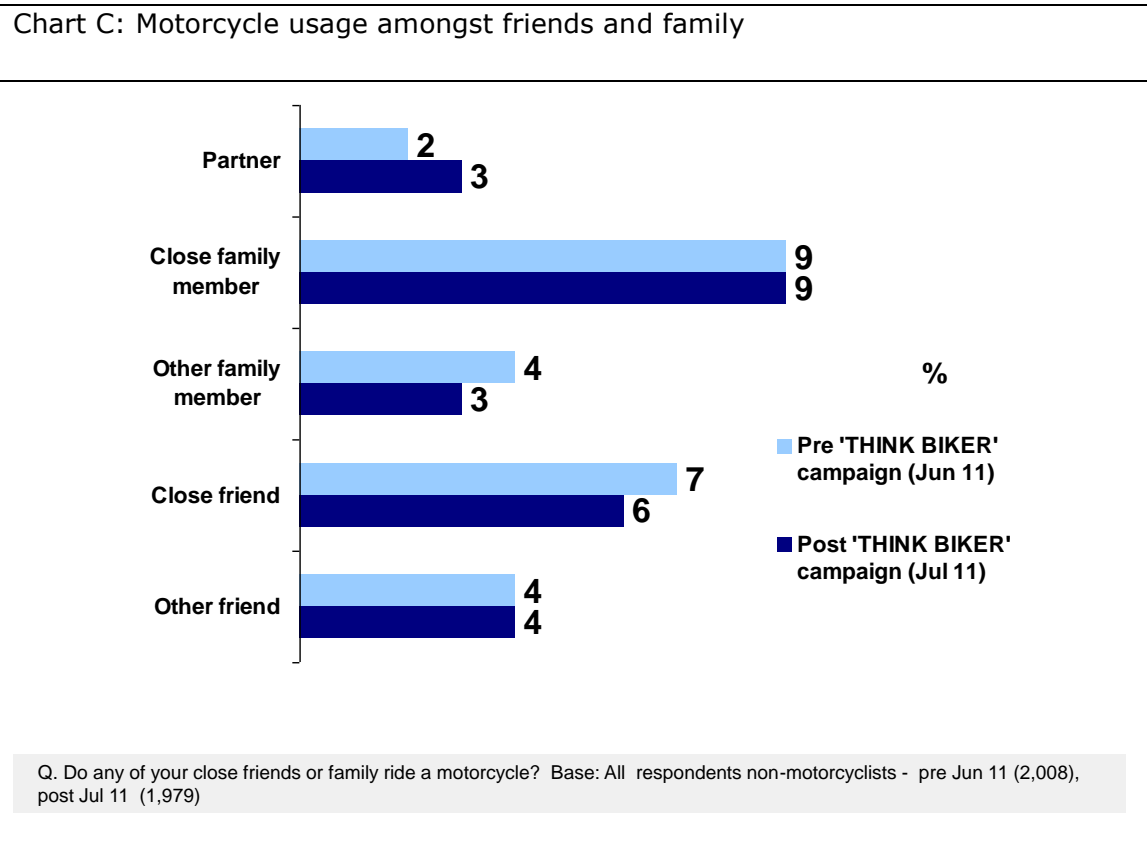
Men were more likely than women to drive a car or van (70% of men compared with 59% of women at the post stage), as were those aged 30 and over (71% compared with 45% 17-29s), those in the higher social grades (77% of ABC1s, compared with 49% of C2DEs) and those from a white ethnic background (67% of those from a white ethnic background, compared with 44% of those from a non-white ethnic background).

Chart B shows type of motorcycle by size.



The greatest proportion of motorcyclists reported an engine size of more than 500cc (66% at the post stage). These proportions are based on a small base size (38 respondents at the post stage).

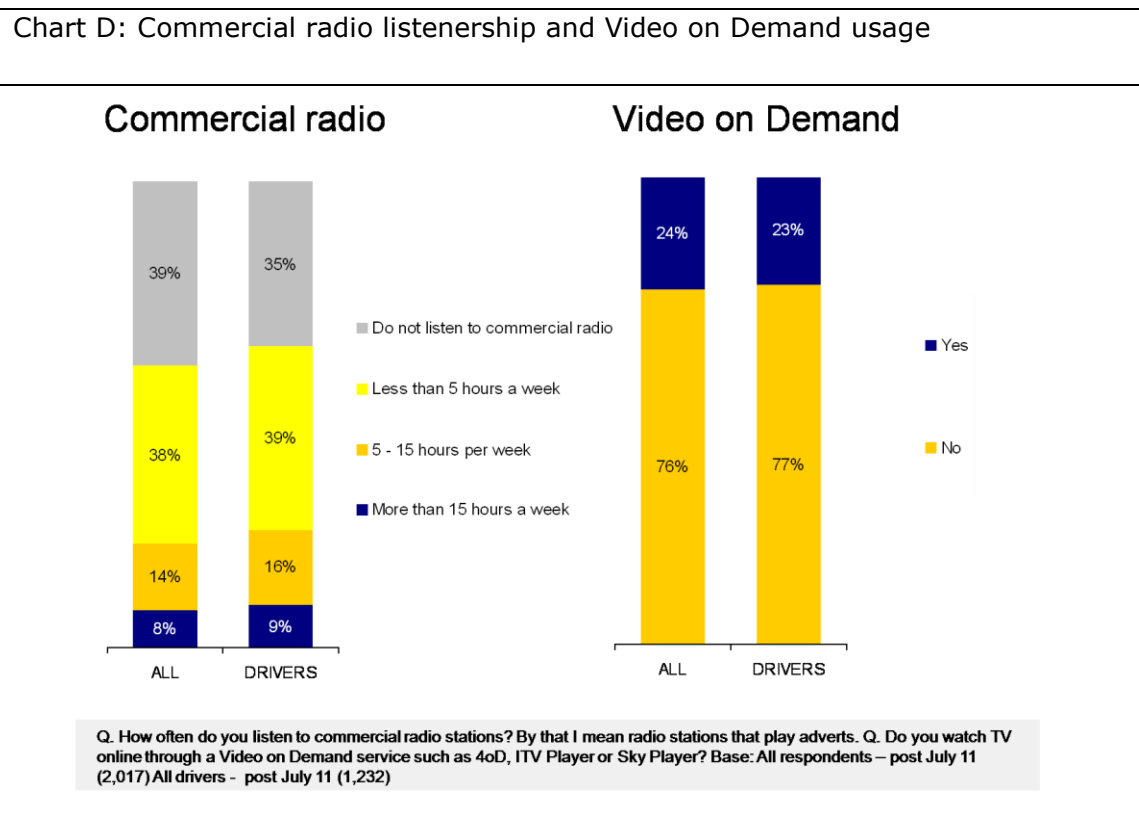
Chart C shows the proportion of non-motorcyclists who know someone who rides a motorcycle.



A quarter of non-motorcyclists had a family or friend who rides a motorcycle (24% at the post stage). This was a close family member or friend for 17% of non-motorcyclists.

Younger respondents, aged between 17 and 29, were more likely to know someone who rides a motorcycle (30% compared with 22% of those aged 30 or over [at the post stage]). These younger respondents were particularly more likely to have a close friend who rides a motorcycle (10% compared with 5%).

Chart D shows the level of commercial radio listenership and use of Video on Demand.



Four in ten (39%) respondents did not listen to commercial radio stations. Four in ten (38%) were defined as light listeners (less than 5 hours per week), 14% were medium listeners (5 to 15 hours) and a further one in ten (8%) were heavy commercial radio listeners (more than 15 hours per week).

Drivers were less likely than respondents generally to not listen to commercial radio at all (35%).

Men were more likely than women to listen to commercial radio (64% of men compared with 57% of women). The age group least likely to listen to commercial radio were those aged 55 and above (46%).

A quarter of respondents (24%) watched television online through a Video on Demand service. Drivers were no more or less likely than adults generally to watch Video on Demand. Men were more likely to watch TV online than women (27% compared with 20%), as were younger respondents (44% of those aged under 30 compared with just 17% of those aged 30 and over) and those from higher social grades (29% of ABC1s compared with 17% of C2DEs).

Appendix B: Sampling method

The TNS CAPI Omnibus employs a random location methodology, using sampling points which are sub samples of those determined in a sampling system developed by TNS for its internal use.

The aim of random location sampling is to eliminate the more unsatisfactory features of quota sampling without incurring the cost and other penalties involved in conducting surveys according to strict probability methods.

One of the principal advantages of probability techniques of sampling is that selection of respondents is taken from the hands of interviewers. In conventional quota sampling, on the other hand, interviewers are given quotas to fill, usually from within specified administrative areas. When, for example, an interviewer is asked to complete a quota of AB respondents, she will tend to go to a part of the district where she knows such individuals to be available. AB individuals living in mixed social class areas will have little chance of inclusion. This and similar defects lead to biases which are concealed by superficial agreements between sample profiles and accepted standard statistics.

The principal distinguishing characteristic of random location sampling, as operated by TNS-BMRB, is that interviewers are given very little choice in the selection of respondents. Sample points are defined using 2001 Census small area statistics and the Postal Address File (PAF). These are areas of similar population sizes formed by the combination of wards, with the constraint that each point must be contained within a single Government Office Region (GOR). In addition, geographic systems were employed to minimise the drive time required to cover each area as optimally as possible.

Quotas are set in terms of characteristics which are known to have a bearing on individuals' probabilities of being at home and so available for interview, by sex (male, female housewife, female non-housewife); within female housewife, presence of children and working status, and within men, working status, to ensure a balanced sample of adults within effective contacted addresses. Interviewers are instructed to leave 3 doors between each successful interview.

Appendix C: Weighting procedures

The data are weighted to ensure that demographic profiles match those for all adults in Great Britain aged 15 or over. A rim weighting technique is used in which target profiles are set for eight separate demographic variables. The computer system then allocates a weight to each individual such that the overall composition of the sample is balanced in terms of the targets set.

The actual weights applied thus vary slightly between surveys; precise figures for specific cases are available from TNS-BMRB if required.

Target Weights Applied

Sex 1

	%
Men	48.64
Women without children	32.58
Women with children	18.78

Sex 2

	%
Men working full time	24.49
Men not working full time	24.15
Women working at all	24.42
Women not working at all	26.94

Age within Sex

	Men	Women
	%	%
15-24	7.78	7.37
25-34	7.92	7.88
35-44	8.97	9.13
45-54	8.1	8.31
55-64	7.13	7.42
65+	8.74	11.25

Social Grade within Sex

	Men	Women
	%	%
AB	13.62	13.07
C1	13.51	15.69
C2	11.22	9.81
D	7.16	7.92
E	3.13	4.87

Standard Region

	%
Scotland	8.69
North West	10.75
North	5.22
Yorks/Humber	8.72
East Midlands	7.5
East Anglia	3.97
South East	19.59
Greater London	12.66
South West	8.86
Wales	5.06
West Midlands	8.98

(Source of profile data: BMRB Target Group Index, 2010 and NRS, 2010)

Appendix D: Questionnaire

	Question:
Q1	<p>Do you drive a car, van or motorcycle nowadays, at least once a month?</p> <p>1 Yes, a car or van mainly for leisure/personal use 2 Yes, a motorcycle mainly for leisure/personal use 3 Yes, a car or van for work/business use 4 Yes, a motorcycle for work/business use 5 Yes, a car or van equally for work/leisure use 6 Yes, a motorcycle equally for work/leisure use 7 No, don't drive nowadays 8 Don't know</p>
Q3	<p>Which of the following best describes the engine size of the motorcycle/moped/scooter you drive? <i>If you drive more than one motorcycle / moped / scooter, please select the engine size of the one you ride most often</i></p> <p>(SINGLE CODE)</p> <p>Engine size 50cc or less Engine size greater than 50cc up to 125cc Engine size greater than 125cc up to 500cc Engine size greater than 500cc Don't Know</p>
Q3a	<p>Do any of your close friends or family ride a motorcycle?</p> <p>(MULTI CODE)</p> <p>1 Partner 2 Close family member 3 Other family member 4 Close friend 5 Other friend 6 No friends or family ride a motorcycle 7 Don't Know</p>
Q4	<p>How frequently, if at all, do you do each of the following...</p> <p>STATEMENTS - DO NOT ROTATE</p> <p>Always Occasionally Rarely Never Don't know</p> <p>Look out for motorcyclists when driving (KPI)</p> <p>Check twice for motorcyclists when pulling out at a junction</p>

	<p>Check blind spots for motorcyclists when overtaking</p> <p>Check for motorcyclists when changing lanes on a dual carriageway</p>
Q5	<p>What would you say is the most common cause of motorcycle accidents?</p> <p>PROBE: What else? PROBE FULLY</p> <p>OPEN ENDED – FULLY RECORD VERBATIM</p> <p>Don't know</p>
Q6	<p>Which three of the following statements would you say are the most common causes of motorcycle accidents?</p> <p>MULTICODE – SELECT THREE RESPONSES RANDOMISE</p> <p>A motorcyclist overtakes when they can't see oncoming traffic A car driver pulls out in front of a motorcycle at a junction A motorcyclist loses control because they are travelling too fast A car driver doesn't notice a motorcycle trying to overtake them A motorcyclist loses control because of the road surface A car driver doesn't leave enough room for the motorcycle on the road A motorcyclist isn't concentrating on the car in front of them A car driver doesn't see the motorcyclist clearly because the rider is wearing dark colours Don't Know None of these</p>
Q7	<p>A high number of road accidents happen which involve motorcyclists. Where do you feel responsibility for reducing these accidents lies?</p> <p>Please give your answer on a scale of 1 to 7, where 1 means it is completely the responsibility of car drivers, 7 means it is completely the responsibility of motorcyclists, and 4 means it is the responsibility of both car drivers and motorcyclists equally.</p> <p>1 - It is completely the responsibility of car drivers to reduce accidents involving motorcycles 2 – 3 – 4 – It is equally the responsibility of car drivers and motorcyclists to reduce accidents involving motorcycles 5 – 6 – 7 – It is completely the responsibility of motorcyclists to reduce accidents involving motorcycles</p> <p>Don't know</p>

<p>Q9</p>	<p>Can I just check, have you seen or heard anything about road safety in relation to motorcyclists in any of these ways?</p> <p>01: National newspaper 02: Local newspaper 03: TV advert 04: TV plays\soaps 05: TV news 06: Other TV programmes 07: Radio advert 08: Radio programme 09: Magazine 10: Cinema 11: Poster on bus 12: Poster hoarding 13: Indoor poster 14: Signs at garages/service areas 15: Road signs 16: Through the internet/a website 17: Leaflet\booklet picked up 23: Screens at petrol stations 24: On a social networking website, for example Facebook, Twitter 25: Watching video through the internet, for example 4oD, ITV Player, Sky Player Other (specify) (None of these) (Don't know)</p>
<p>Q10</p>	<p>You said you remember seeing or hearing advertising about road safety in relation to motorcyclists recently. Please tell me everything that you remember about the advertising.</p> <p>OPEN ENDED – FULLY RECORD VERBATIM INTERVIEWER PROMPT: What else? PROBE FULLY</p> <p>Don't know</p>
<p>Q12</p>	<p>To what extent do you agree or disagree with each of the following statements?</p> <p>Agree strongly Agree slightly Neither agree nor disagree Disagree slightly Disagree strongly Don't know</p> <p>IF NECESSARY SAY: How much do you agree or disagree with this statement?</p> <p>Motorcyclists are more vulnerable in every day driving situations than other drivers on the road.</p> <p>When driving, I often worry about failing to notice a motorcyclist and hitting them.</p>

	<p>When I see a motorcycle I think about the person riding it.</p> <p>Although I know motorcyclists are human beings too, I sometimes forget this and only see the bike.</p> <p>Although I know motorcyclists are human beings too, I sometimes forget to pay extra attention to look out for them while driving.</p>
Q17	<p>Have you heard this radio advert or something similar to it?</p> <p>Yes No Don't Know</p>
Q18	<p>What do you think was the main message of the radio advert which I have just played to you?</p> <p>PROBE: What else? PROBE FULLY</p> <p>OPEN ENDED – FULLY RECORD VERBATIM</p> <p>Don't know</p>
Q16a	<p>Here are some things that other people have said about the ad that I have just shown to you. Which of these do YOU personally feel about the advert? Please mention all that you agree with.</p> <p>It told me something new It made me think about my own driving It is aimed at people like me I found it confusing I found it irritating It made ME drive more carefully It sticks in my mind It is the sort of ad I would talk about with other people This ad made me think I should take longer to look for motorcyclists I found it shocking The ad has prompted me to take more notice of the people riding motorcycles The ad has made me feel more empathy towards motorcyclists It is important to have road safety adverts Don't Know None of these</p>
Q20	<p>SHOW ONLINE AD Have you seen this ad on the internet recently?</p> <p>Yes No Don't know</p>

Q20a	SHOW PETROL STATIONS SCREEN AD Have you seen this ad or something similar to it at a petrol station recently? Yes No Don't know
Q20b	Do you watch TV online through a Video on Demand service such as 4oD, ITV Player or Sky Player? Yes No Don't Know
Q20c	SCREEN GRAB Have you seen this advert when watching TV online recently? Yes No Don't Know
Q21	How often do you listen to commercial radio stations? By that I mean radio stations that play adverts. Do not listen to commercial radio Less than 5 hours a week 5-15 hours a week More than 15 hours a week Don't know