

'Safer Speeds Enforcement' campaign  
An independent review by TNS New Zealand  
March 2015



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# 1

## Background & approach



# TNS has undertaken independent research to understand audience reception to the recent 'Safer Speeds Enforcement' campaign

Three key components to answering the question of how the recent NZ Police & ACC 'Safer Speeds Enforcement' campaign impacted the audience ...

## Gauge unprompted awareness of recent road safety campaigns

- What did NZ road users think NZ Police's priorities were for road safety over the summer period?
- How many recalled road safety communications campaign activity?
- From what channels?
- For which campaigns?
- What messages did they take away?
- How does this vary by demographic segment?

## Gauge current attitudes and behaviours towards driving

- Did road users feel safer on the roads over summer, and if so, why?
- What (positive) driving behaviours did NZ road users adopt over the summer period?
- Specifically relating to speed, what are NZ road users perceptions of speeding? What constitutes speeding in different environments?
- At what point do NZ road users feel they should be ticketed for speed in different environments?
- How does this vary by demographic segment?

## Gauge the specific impact of the 'Safer Speeds Enforcement' campaign

- What is the level of recognition for the 'Safer Speeds Enforcement' campaign?
- What media channels were driving this?
- How motivating / engaging was the campaign?
- What key messages did it communicate?
- How clear or confusing did NZ road users find the campaign?
- How does the campaign perform on other typical advertising diagnostics?
- What media coverage about the campaign were people aware of?
- How does this vary by demographic segment?

# Audience responses were measured via an online survey of SmileCity™ members in late February 2015

## Summary of the research approach

<b>Methodology</b>	A single-source online survey of panellists from SmileCity™, NZ's largest research panel with over 245,000 active panel members
<b>Survey length</b>	Survey of 15 minutes in duration
<b>Survey timing</b>	Survey conducted 20th-25th February 2015 (campaign ended on 31 January 2015)
<b>Target sample</b>	New Zealander road users – private vehicle users, commercial vehicle users, motorcyclists and bicyclists – aged 18 years or older (herein referred to as 'New Zealand road users aged 18 plus' or 'road users')
<b>Sample size</b>	N = 501
<b>Weighting</b>	Data was post-weighted by age, gender, ethnicity and region to reflect the underlying population according to Census 2013 data that is publicly available by Statistics New Zealand
<b>Margin of error</b>	Maximum margin of error at 95% confidence is +/- 4.4%
<b>Further information</b>	For more information about TNS New Zealand and the SmileCity™ panel, please refer to the Appendix of this report

# The questionnaire was structured as follows:

## Overview of the questionnaire structure

### Screenener

- **Purpose:** To ensure we are surveying the identified target sample and capture necessary data for weighting purposes before “screening out” those that don’t qualify
- **Key questions:** Age; gender; region; ethnicity; type of road user

### Spontaneous awareness of road safety campaigns

- **Purpose:** To capture true unprompted awareness of the 'Safer Speeds Enforcement' campaign and other road safety initiatives before asking respondents more specific road safety questions. At this stage respondents are not aware that the survey will focus on safer speeds initiatives specifically
- **Key questions:** Spontaneous awareness; channel driving awareness; content recalled (open-ended); message out-take (open-ended); whether people changed their behaviour as a result of what they saw; how they changed their behaviour (open-ended); what NZ road users though NZ Police’s focus was over the summer (open-ended)

### Attitudes and behaviours towards using NZ roads

- **Purpose:** To measure people’s beliefs, attitudes and behaviours about how they drive and also to understand their definition of speeding and at what point they feel they should be ticketed
- **Key questions:** What speeding means to NZ road users (open-ended); at what speed constitutes speeding on the open road, motorway or urban environments; at what speed tickets should be issued in those same environments; perceptions of how safely people drove over Dec/Jan; specific changes in behaviour made over Dec/Jan; attitudes towards road policing

### Prompted evaluation of the 'Safer Speeds Enforcement' campaign

- **Purpose:** To measure recognition of the specific NZ Police & ACC creative assets that formed the campaign and understand its motivational impact
- **Key questions:** Prompted recognition of advertising from each channel (billboards, radio, social media); message out-take for each channel; AdEval™ questions<sup>(1)</sup>; campaign diagnostics; degree of confusing around the campaign; recall of media coverage about the campaign; content recalled from media coverage

### Demographics

- **Purpose:** To capture any other useful profiling variables that might provide insight into the results and / or identify priority groups for targeting
- **Key questions:** Media usage; household compositions; household income

# 2

## Key findings & insights



# Key findings & insights

1

As a result of the 'Safer Speeds Enforcement', 'Mistakes' and 'Numbers' campaigns, and the 'Safer Speeds Enforcement' campaign in particular, New Zealanders were clear that one of NZ Police's key priorities for the summer was getting people to drive to safer speeds

2

There is a good level of support for enforcing the speed limit when drivers are going at speeds of up to 110km/h on the open road and up to 60km/h in towns and cities – 71% and 79% of people respectively believe such speeds should be ticketed

3

Overall, the 'Safer Speeds Enforcement' campaign has performed well at achieving its comms objectives and there is evidence that it has positively impacted driver behaviour in the short-term – the challenge ahead is to entrench these behaviours as habits over the longer term

4

The campaign appears to have positively impacted driving behaviour in the short-term – over 75% of those motivated by the campaign adopted some type of positive driving behaviour over December & January, compared to 62% of all NZ road users

5

Very few New Zealand road users claimed to find the campaign confusing and in fact, of the nine diagnostics on which the campaign was evaluated, it performed best on 'easy to understand' and 'the campaign is clear'

6

Thirty percent of road users recalled news media coverage of the 'Safer Speeds Enforcement' campaign. The coverage generated off-strategy out-takes for just over half of those who recalled it, with the most common off-strategy out-take being the phrase "zero tolerance"



# 3

## Current attitudes to road policing

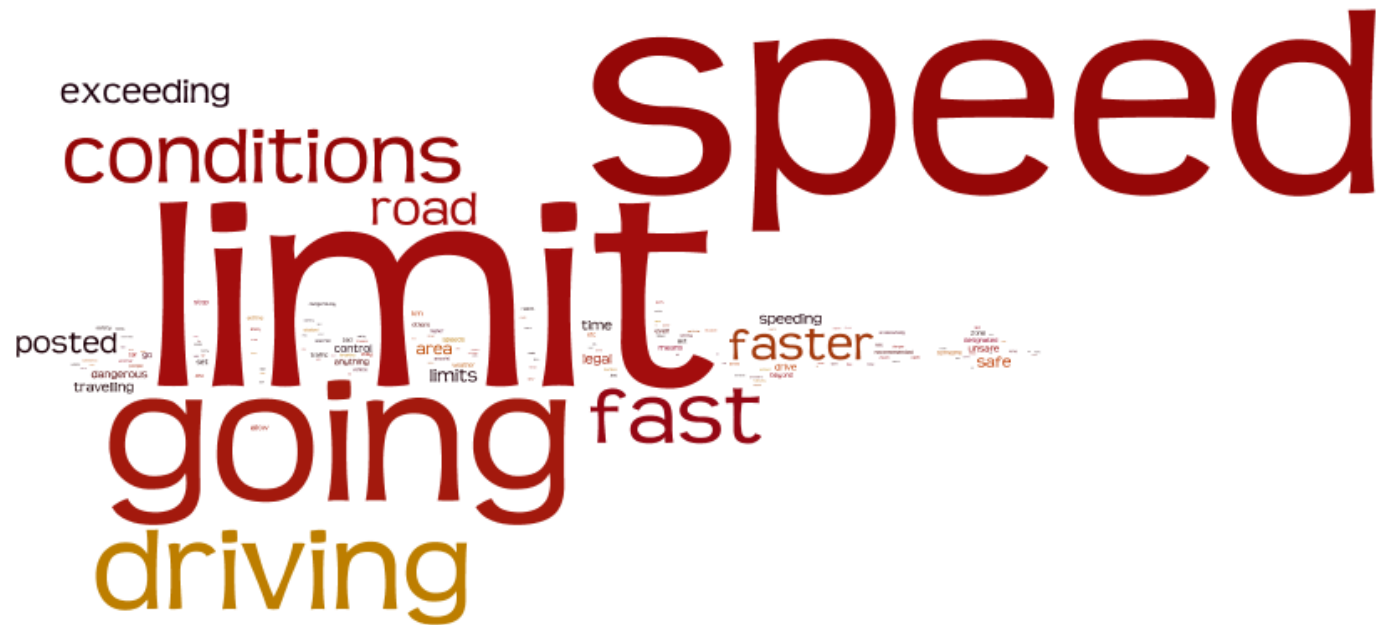


# Current attitudes to road policing – key findings

- When asked to tell us in their own words what “speeding” means to them, the key defining factor for most New Zealand road users is that ‘speeding’ relates to exceeding the speed limit
- There is a good level of support for enforcing the speed limit when drivers are going at speeds of up to 110km/h on the open road and up to 60km/h in towns and cities – 71% and 79% of people respectively believe such speeds should be ticketed. There is majority support for enforcing the speed limit on motorways also, but at slightly lower levels (62%)
  - When speeds up to 4km/h over the limit are viewed as speeding, support for enforcement by issuing a ticket is less strong – for instance, 19% see speeds of 101 to 104km/h as speeding on the open road but only 10% see that such speeds should be ticketed
- Furthermore, support for road policing is strong with the net majority of New Zealand road users believing that road policing makes a positive difference
- It is encouraging to see that road users claimed to have changed their driving behaviour for the Dec/Jan period with 62% specifically claiming to have made a positive change – most typically, to keep an eye on their speed more. The challenge ahead is to establish these seasonal behaviours as year long habits
- Similar proportions of people felt they drove more safely and less safely over the Dec/Jan period – those who felt they had driven less safely claimed to feel more frustrated over the period, but frustrated people were also more likely to adopt a number of positive driving changes suggesting that the frustration experienced to some extent resulted from the process of changing habits

The key defining factor in terms of what 'speeding' is relates to exceeding the speed limit

## What does 'speeding' mean to New Zealanders? (open-ended response)



*"Going **faster than is safe**  
for the situation and or  
conditions"*

*"Any speed **over the speed limit** on show"*

*"15 over the 100 limit, 60 in a 50 zone"*

*"Driving over the speed limit  
set - or **to the conditions**  
at the time"*

"Going **above 5 km over**  
the posted speed limit"

## Key themes

Over the speed limit / threshold	62%
Just going too fast	27%
Driving too fast for conditions	17%

Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "This next section is about your attitudes and behaviours towards driving or riding safely on the road. Firstly, what does 'speeding' mean to you?"

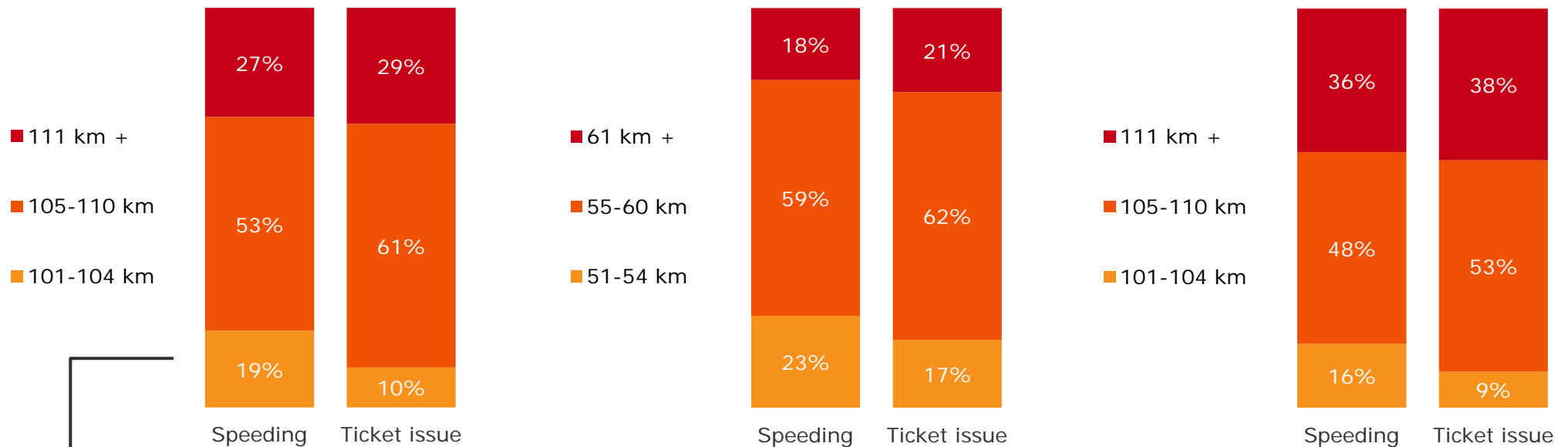
It is encouraging to see that over 70% of people think that speeds of 101 to 110 km/h on the open road should be “ticketable”, increasing to 79% for towns and cities

## Perceptions of speeding and when tickets should be issued (threshold groups km/hour)

### Open road

### Towns / cities

### Motorway

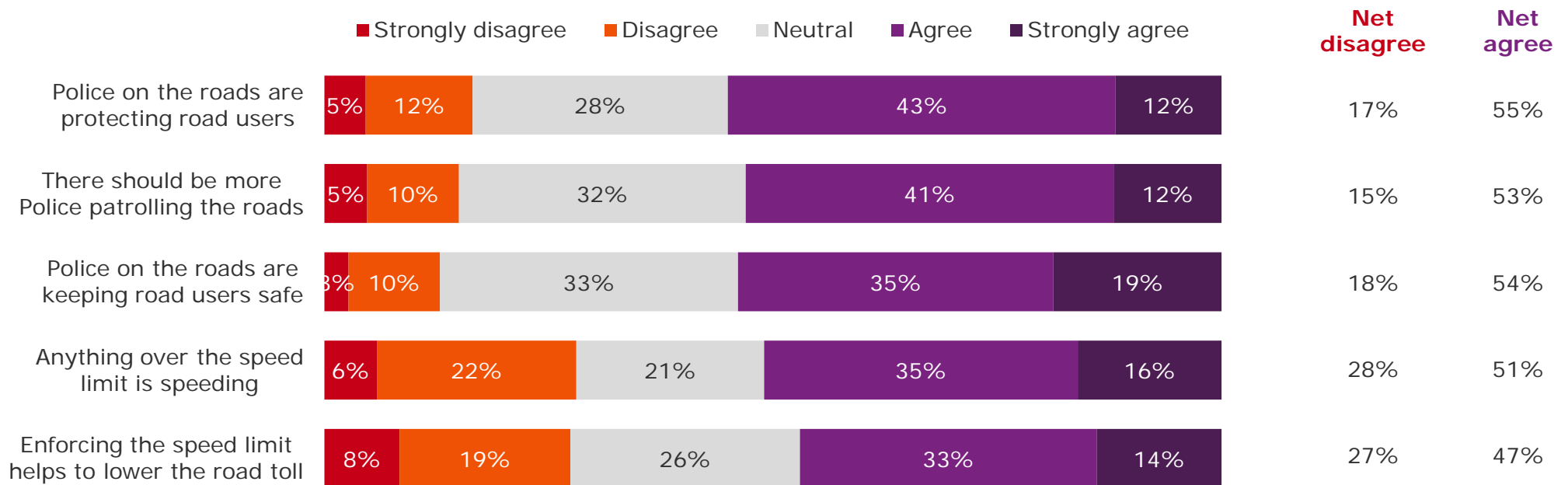


Whilst 19% of NZ road users see speeds of 101-104 km/h to constitute speeding on the open road, only 10% think that range should be “ticketable”

Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording for each environment: Speeding, “What speed would you consider to be speeding? I.e. driving/riding at what speed?”; Ticket issue, “And at what speed do you think people should receive a speeding ticket?”

# Support for road policing is strong with the net majority of New Zealand road users believing that road policing makes a positive difference

## Attitudes towards road policing (%)

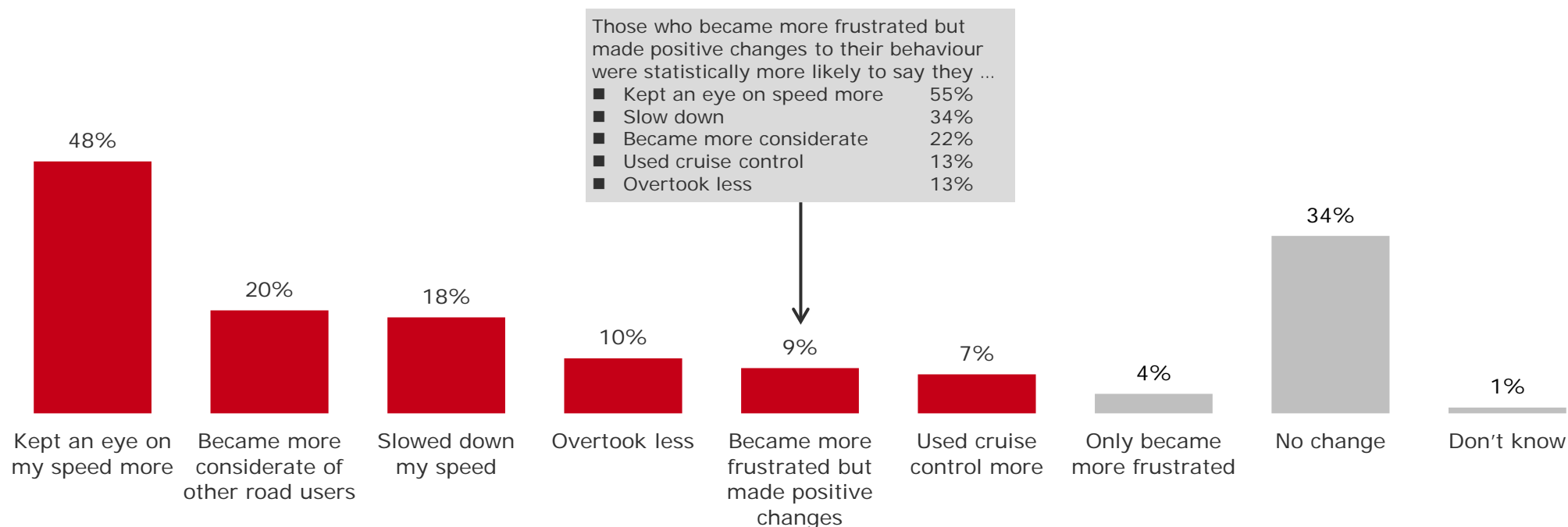


Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "Now we would like your opinion on some statements about road safety. Please indicate whether you agree or disagree with each statement below."

It is positive to see that road users claimed to have changed their driving behaviour for the Dec/Jan period – the key is to establish these seasonal behaviours as year long habits

## How road users claim to have changed their driving behaviour for the Dec-14/Jan-15 period (multiple response, %)

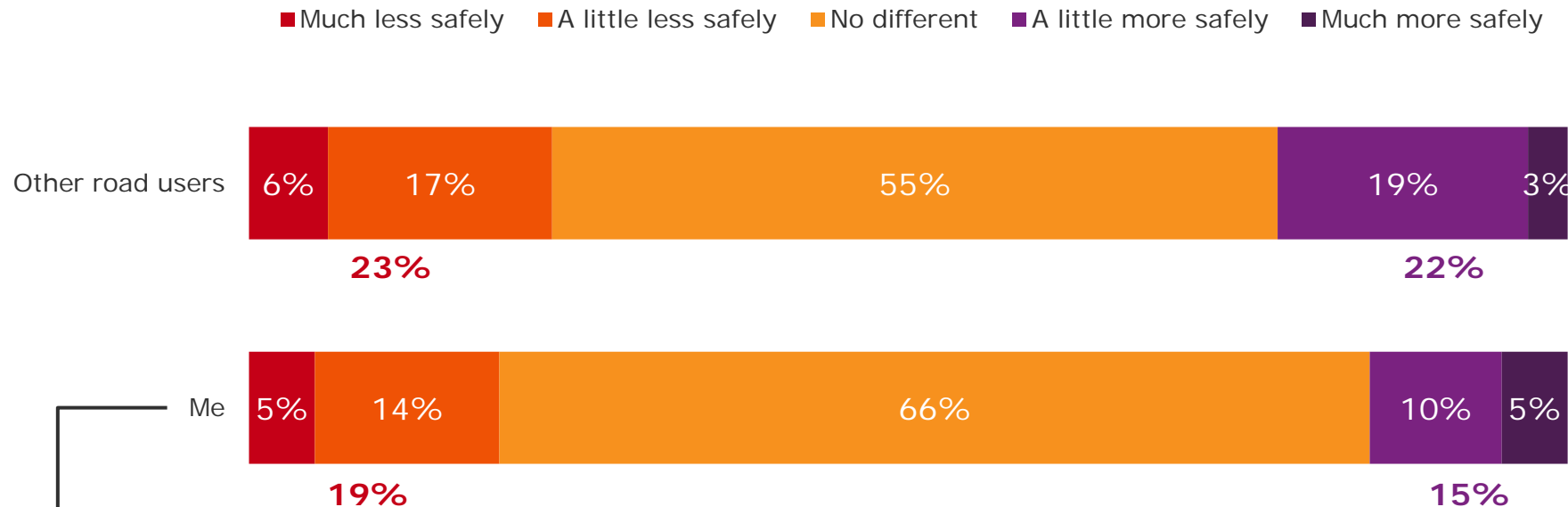
**62%** Of road users claimed to have changed their driving behaviour positively over the Dec/Jan period



Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "And how would you say your own driving changed, if at all, over the recent December / January period?"

# Similar proportions of people felt they drove more safely and less safely over the Dec/Jan period

## Perceptions of how people were driving over December/January (%)

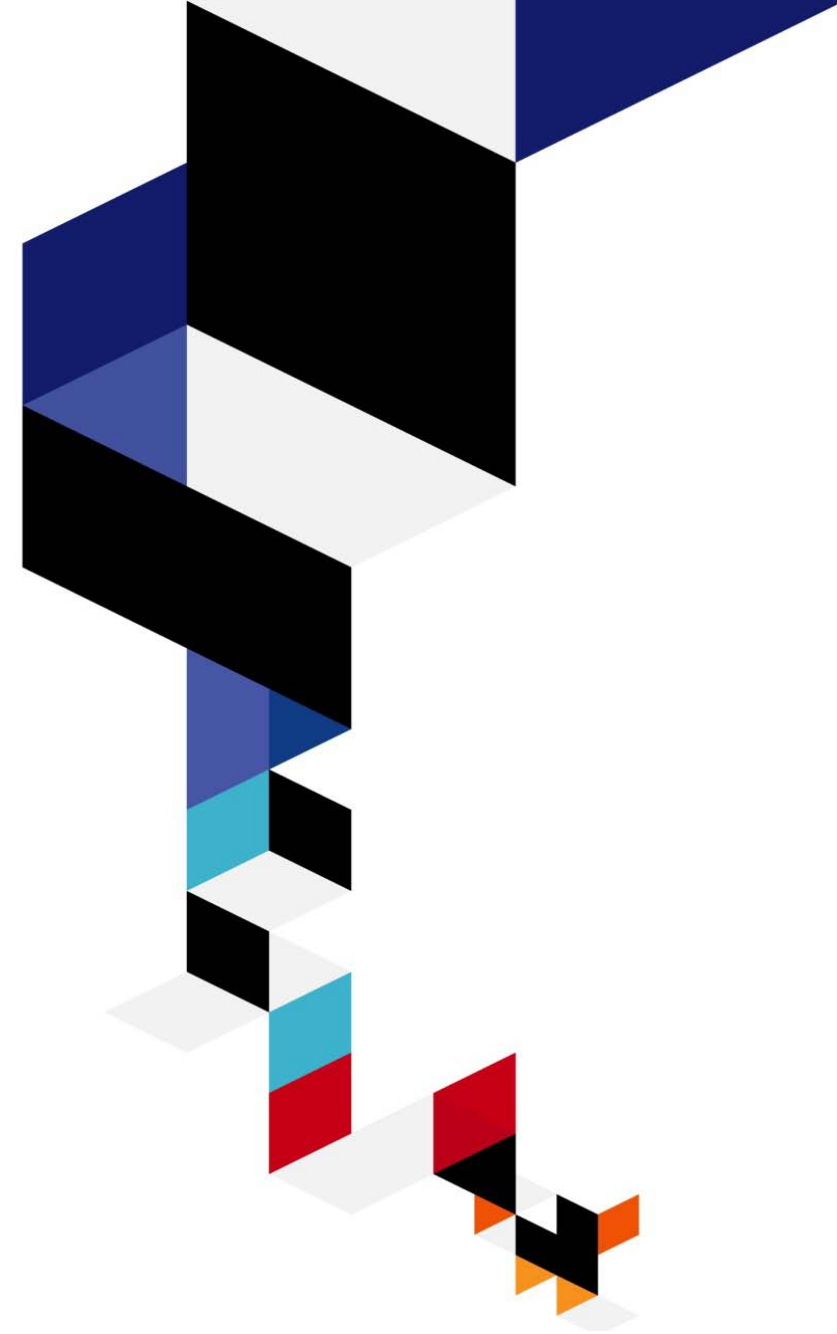


Those who perceive they drove **less safely** were more likely say they became to be frustrated (31% versus 3% for those who drove safely) while those that day they drove **more safely** were more likely to say they kept an eye on their speed (62% versus 42%)

Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "Thinking about your own personal experience driving or riding on roads over the recent December / January period. Compared to other times you drive or ride would you say you felt...", "And how would you say other road users were driving or riding compared to other times? Would you say they were driving or riding..."

# 4

## Awareness of road safety campaign activity





# Awareness of road safety campaign activity – key findings

- New Zealand road users have a good understanding of what NZ Police's main focus was over the 2014/2015 summer period with two thirds spontaneously recalling some form of road safety messaging
- Recall of such messaging was predominantly through television, TV news and billboards and half of all messages recalled focused on 'speed'
- Just over a third of those recalling road safety communications felt the campaign impacted their driving with again the focus on reducing speed - those spontaneously recalling the 'Safer Speeds Enforcement' campaign were even more impacted with 44% of those recalling campaigns claiming to have adjusted their driving as a result
- Respondents were then shown / played specific creative examples from the 'Safer Speeds Enforcement' campaign including the images that appeared on billboards and social media as well as the radio ad – 44% of road users recognition any of these assets when prompted, broken down as:
  - Billboards – recognised by 34%
  - Radio – recognised by 16%
  - Social media – recognised by 8%
- The messaging of the campaign is mostly on-strategy and the radio ad is driving higher take-out of the specific “zero tolerance” phrase

New Zealand road users have a good understanding of what NZ Police's main focus was over the 2014/2015 summer period

**New Zealanders' perceptions of what the New Zealand Police were focused on over the summer period (open-ended response)**



Key messages	
Speed	64%
Alcohol	35%
"Zero tolerance"	3%

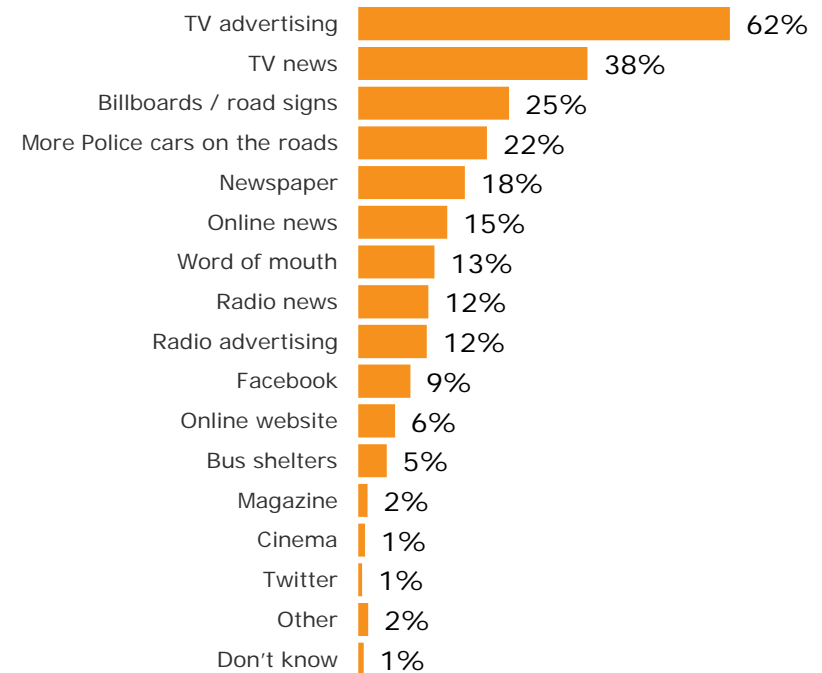
Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "And thinking about the New Zealand Police specifically. Please list below what you think they were doing or focusing on over the summer period"

# For the two thirds of road users that can recall road safety campaigns, TV and billboards are the main channels driving awareness

## Unprompted awareness of any recent road safety campaigns (%)



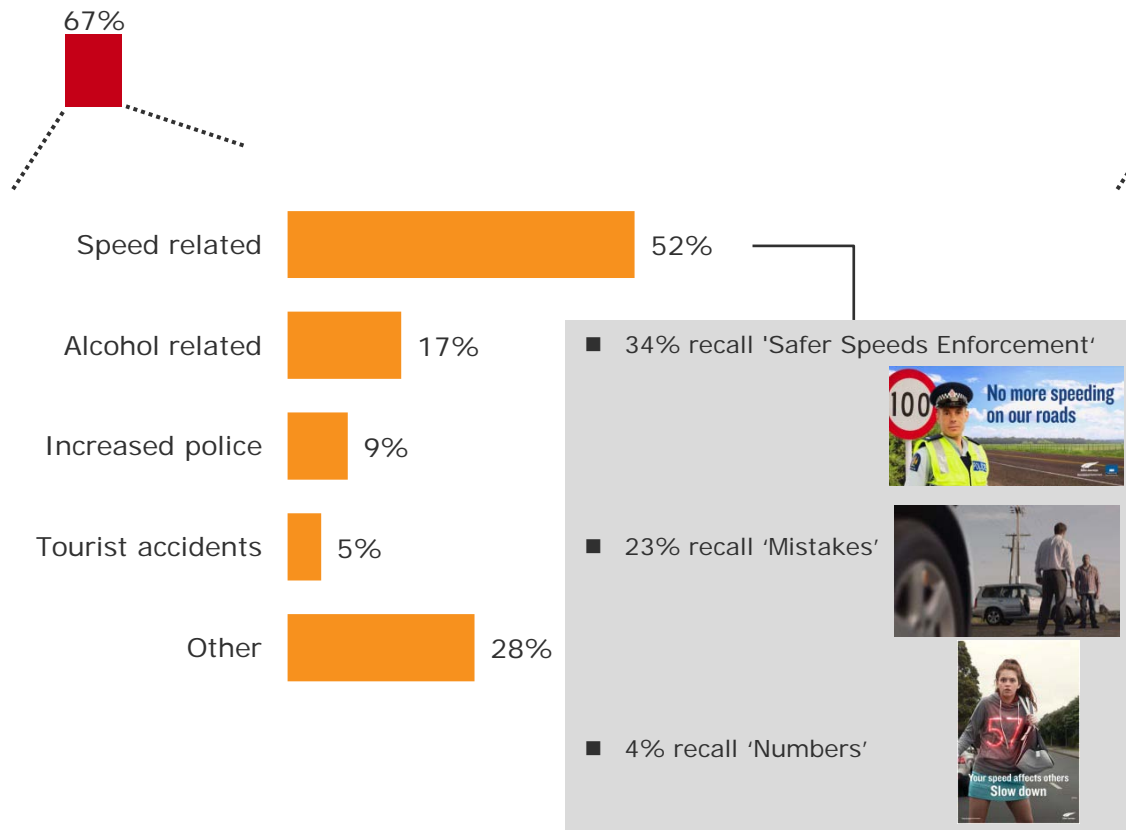
## Media channels driving unprompted awareness of road safety campaigns (aware, %)



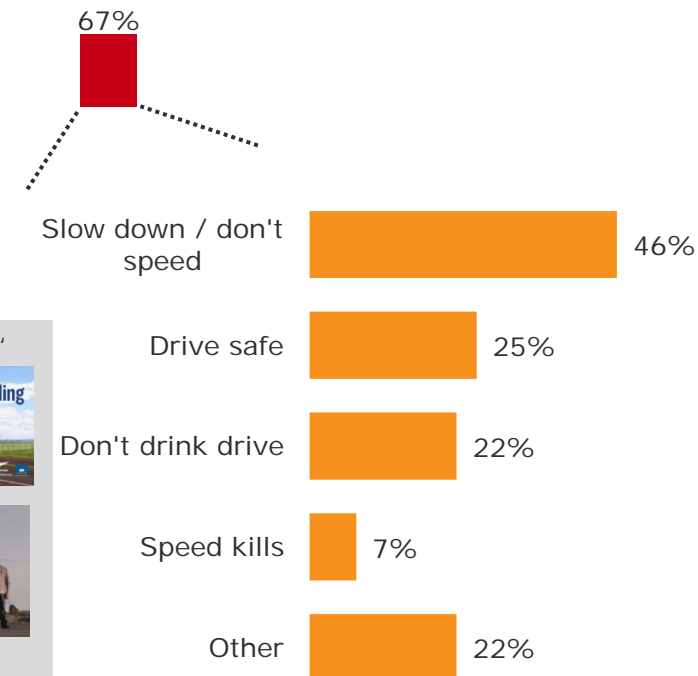
Base: New Zealand road users aged 18 plus. Sample size n = 501. Base: New Zealand road users aged 18 plus that spontaneously recall any road safety campaigns. Sample size: n = 332. Question wording "We would like you to take your time and think about any road safety activities, advertising or publicity you have seen or heard about over the past few months since December. This may include things you've seen on the TV, online, newspaper or magazine articles, billboards, radio, something you've heard in the news or talked about with friends, through public events or seeing Police out and about."

# Those aware are mostly recalling speed-related campaigns and associated messages

## Campaign seen (Spontaneous mention, %)



## Key message (Spontaneous mention, %)

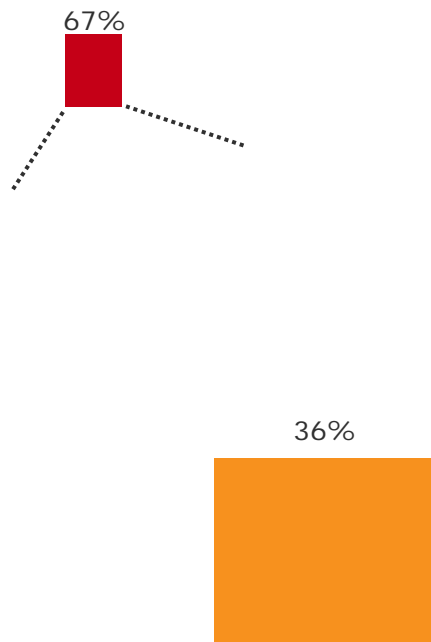


Base: New Zealand road users aged 18 plus that spontaneously recall any road safety campaigns. Sample size: n = 332. Question wording: Campaign seen, "Thinking about the road safety activities, advertising or publicity that you can recall, please describe each activity, ad or publicity you've heard in as much detail as possible using the boxes below. Please use one box per ad."; Key message, "Question wording "And what do you think the key message of the road safety activity, ad or publicity was?"

A third of people spontaneously recalling road safety campaigns say they changed their driving behaviour as a result

### % with spontaneous recall that changed their behaviour

## How behaviour changed ...



*"Being extra cautious about speed, realizing just **5 kms can make a difference** to stopping"*

*"I was very aware on the roads, particularly when travelling long distances. I was careful with overtaking and **keeping my speed at 90-100**"*



*"Plan my journey well so I **don't need to rush...**"*

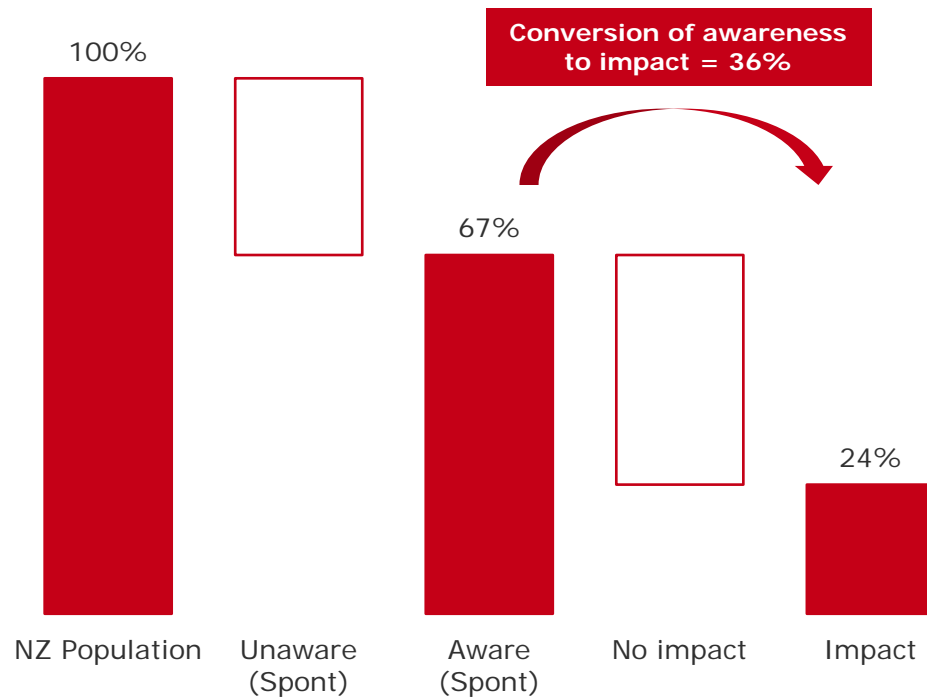
*"Drove 90-100 instead of 100-104 or 100-110"*

*"The slow down billboards always keep me **mindful of my speed** when I drive, if I pass one I always check how fast I'm going"*

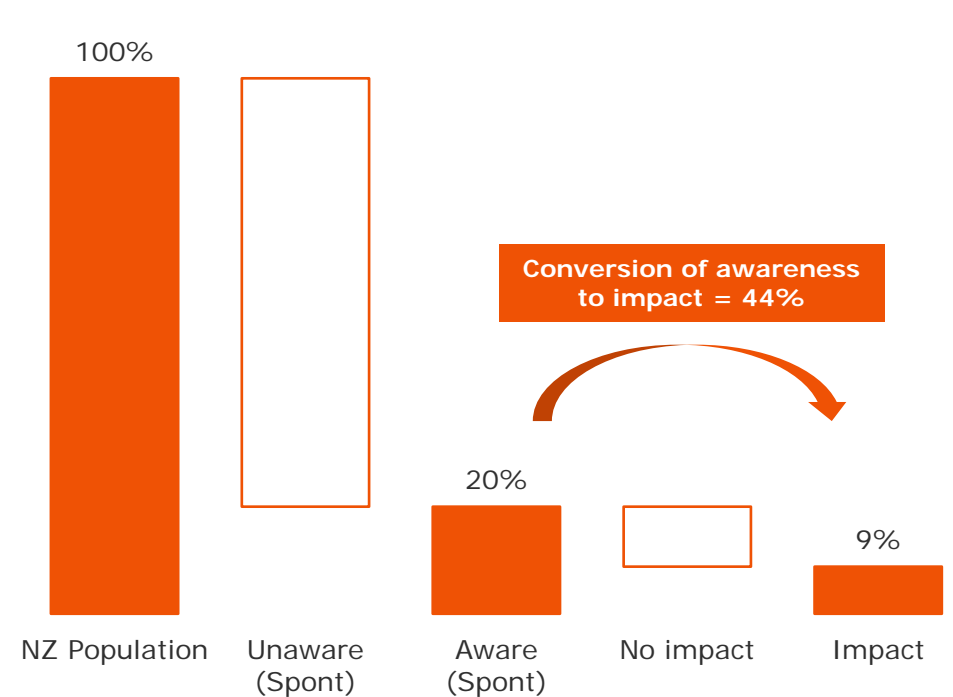
Base: New Zealand road users aged 18 plus that spontaneously recall any road safety campaigns. Sample size: n = 332. Question wording: "Did you change your driving or riding behaviour as a result?"

Compared to all road safety campaigns, the 'Safer Speeds Enforcement' was more likely to initiate a change in driving / riding behaviour (44% of those aware)

### Overall impact of all and any road safety campaigns



### Overall impact of the 'Safer Speeds Enforcement' campaign



Base: New Zealand road users aged 18 plus. Sample size n = 501.



Respondents were prompted separately with the following images along with audio of the radio ad

### Billboard prompts

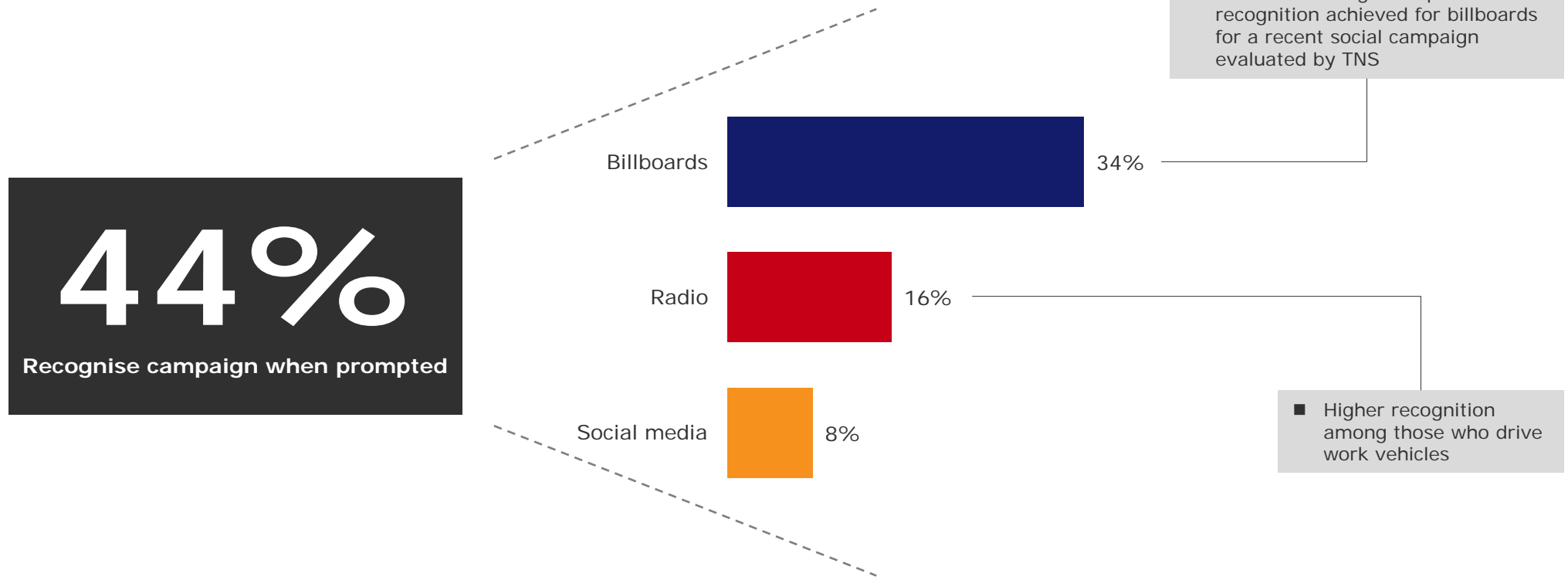


### Social media prompt



At 44%, overall prompted recognition of the 'Safer Speeds Enforcement' campaign is good for a campaign driven predominantly by the billboards

### Prompted recognition of key campaign media (%)

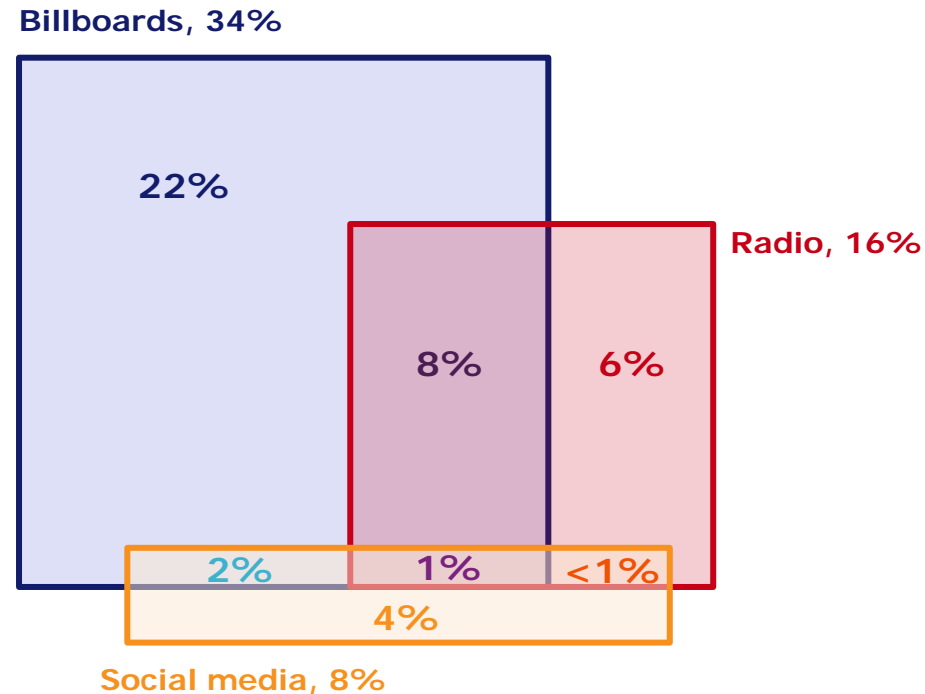


Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "We are now going to show you some road safety advertising that you may have seen recently. Have you seen these billboards over the past few months?", "Have you heard this radio ad over the past few months?", "Have you seen any of the following social media posts over the past few months?". Media examples displayed in random order to minimise order effects.



While billboard recognition in isolation is most likely, there is a large overlap in recognition of both billboards and radio ad

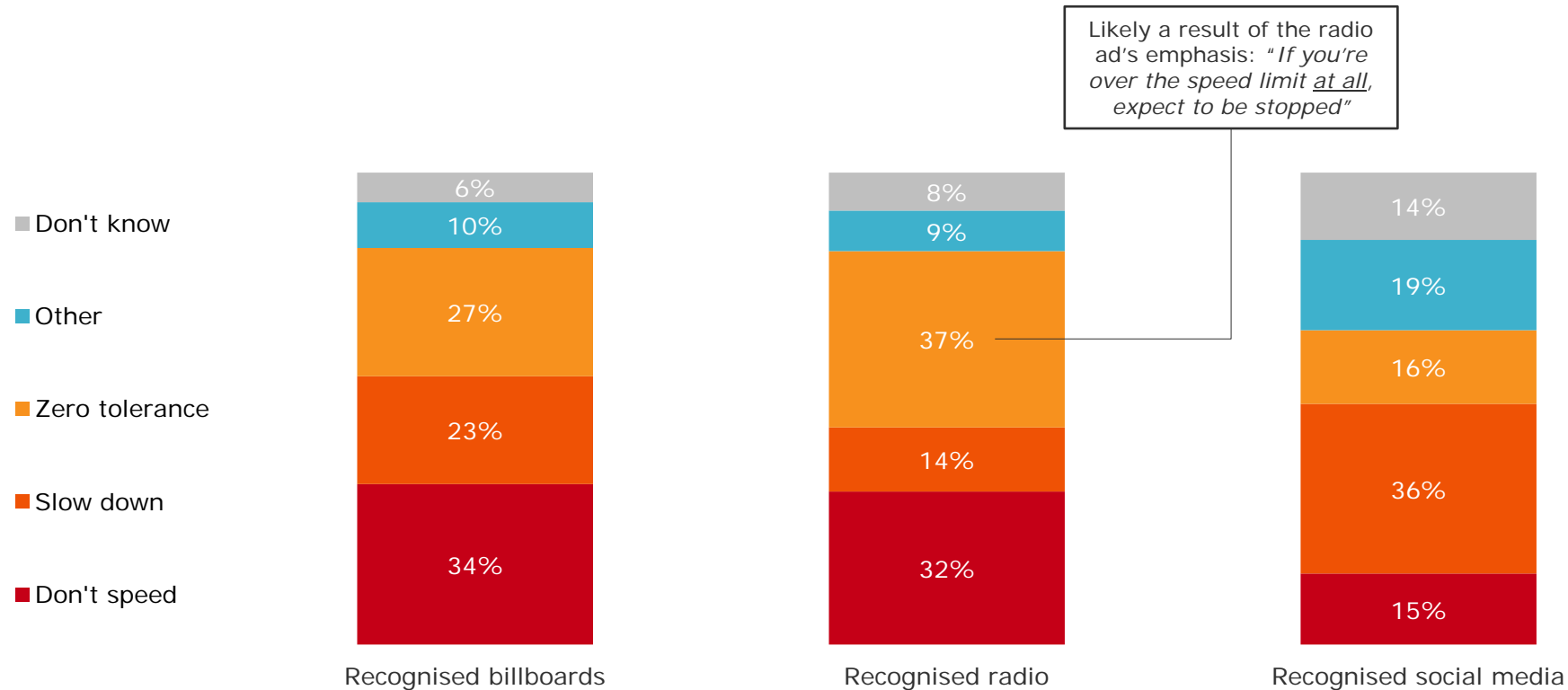
### Overlap in prompted recognition of key campaign media



Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "We are now going to show you some road safety advertising that you may have seen recently. Have you seen these billboards over the past few months?", "Have you heard this radio ad over the past few months?", "Have you seen any of the following social media posts over the past few months?". Media examples displayed in random order to minimise order effects.

The messaging of the campaign is mostly on-strategy and the radio ad is driving higher take-out of the “zero tolerance” phrase

Spontaneous main message taken from each media source (%)



Base: New Zealand road users aged 18 plus, by media channel recognised. Sample size: Billboards, n = 174; Radio, n = 80; Social media, n = 42. Question wording: For each media channel recognised, "What do you think the ad was trying to tell you?"

5

## Campaign creative impact



TNS Brand & Communications  
'Safer Speeds Enforcement' campaign

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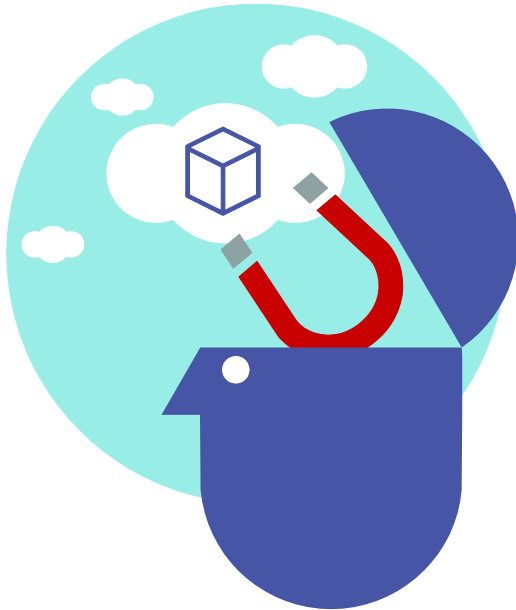
# Campaign creative impact – key findings

- We tested campaign performance using AdEval™ which produces two measures of impact: motivation and affective memory potential. AdEval™ is TNS' proprietary communication testing and tracking solution that is used to evaluate advertising performance (both for pre-testing and campaign tracking) for a broad range of clients around the world
- For the 'Safer Speeds Enforcement' campaign, a high proportion of road users are 'motivated' by it – but a similar proportion are not impacted by it and can thus be described as having a polarising AdEval™ profile
  - In TNS' experience, it is not uncommon to observe such a profile for social campaigns aimed to positively change engrained social and cultural behaviours – similar profiles have been observed for advertising aimed at: getting people to moderate their alcohol consumption, seeking help for mental health, getting people to stop smoking
  - For such topics, people often feel the campaign doesn't apply to them, but this does not mean that it is not possible to achieve a 'motivating' profile shape
- Recall of the billboards and social media is more strongly correlated with being motivated by the campaign, with radio appearing to have the weakest impact of the three channels. In addition, there is a correlation between motivation and the number of channels from which people recognise the campaign suggesting that a mixed media strategy has added value
- Of all diagnostics on which the campaign was evaluated, it performs best on being easy to understand whilst the biggest gap between those that are motivated or not is on belief in the campaign – only 10% indicated they found the campaign confusing as a result of perceived ambiguity around the speed enforcement threshold
- A third of road users claim to have seen media coverage of the campaign, which for half has lead to the take-out of off-strategy messages, as far as the intent of the 'Safer Speeds Enforcement' campaign is concerned

We tested campaign performance using AdEval™ which produces two measures of impact: motivation and affective memory potential

### Short-term: 'motivation'

Drive immediate appeal towards the brand; measured using six single response questions



### Long-term: 'affective memory potential'

Update brand memories and create long term effects that change attitudes and behaviours; measured using three single response questions



AdEval™ is TNS' proprietary communication testing and tracking solution



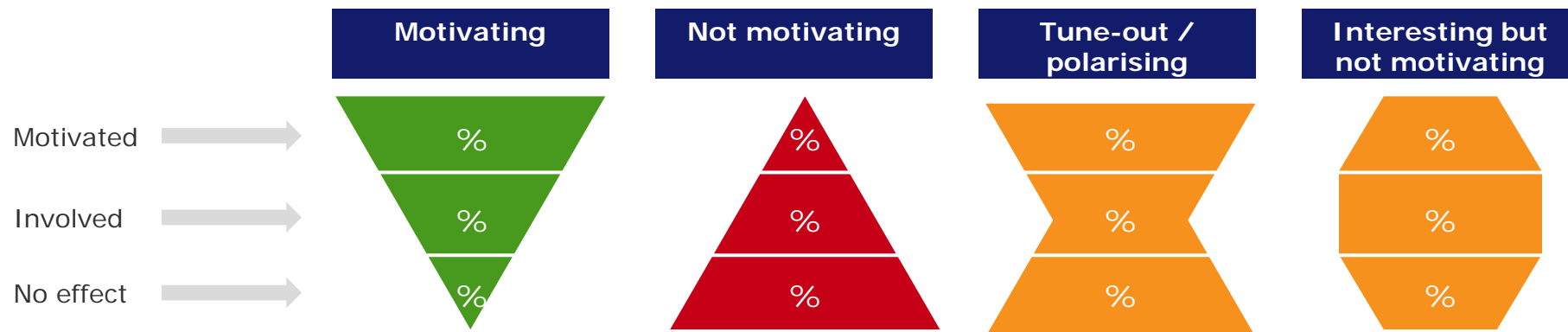
TNS Brand & Communications  
'Safer Speeds Enforcement' campaign

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The key output from the motivation questions is the AdEval™ motivational profile; the shape of which tells us how a campaign / execution is working



Typical AdEval™ motivational profile shapes



% = Proportion of audience that fall into this segment

**Motivating campaigns are ones that people ...**

- Are happy to see again
- Would pay attention to if they came across it
- See as worthwhile to pay attention to
- Increase interest with the subject matter
- Generate positive 'talkability'
- Improve opinions about the subject matter

AdEval™ is TNS' proprietary communication testing and tracking solution

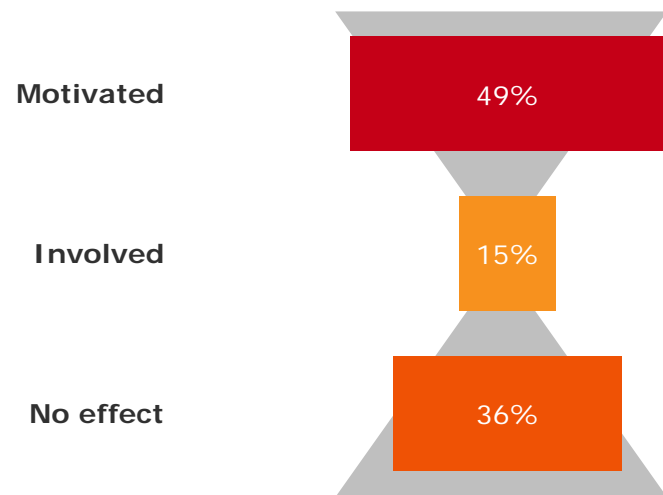


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'Safer Speeds Enforcement' campaign

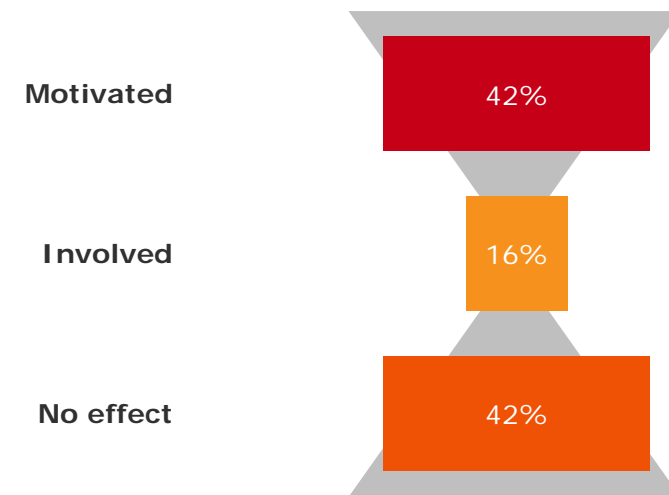
© TNS Prepared March 2015

# The safer speeds campaign was reasonably effective in short term motivating impact

## Short-term impact: Motivational profile for road users that recognise the campaign



## Short-term impact: Motivational profile for all road users, regardless of awareness

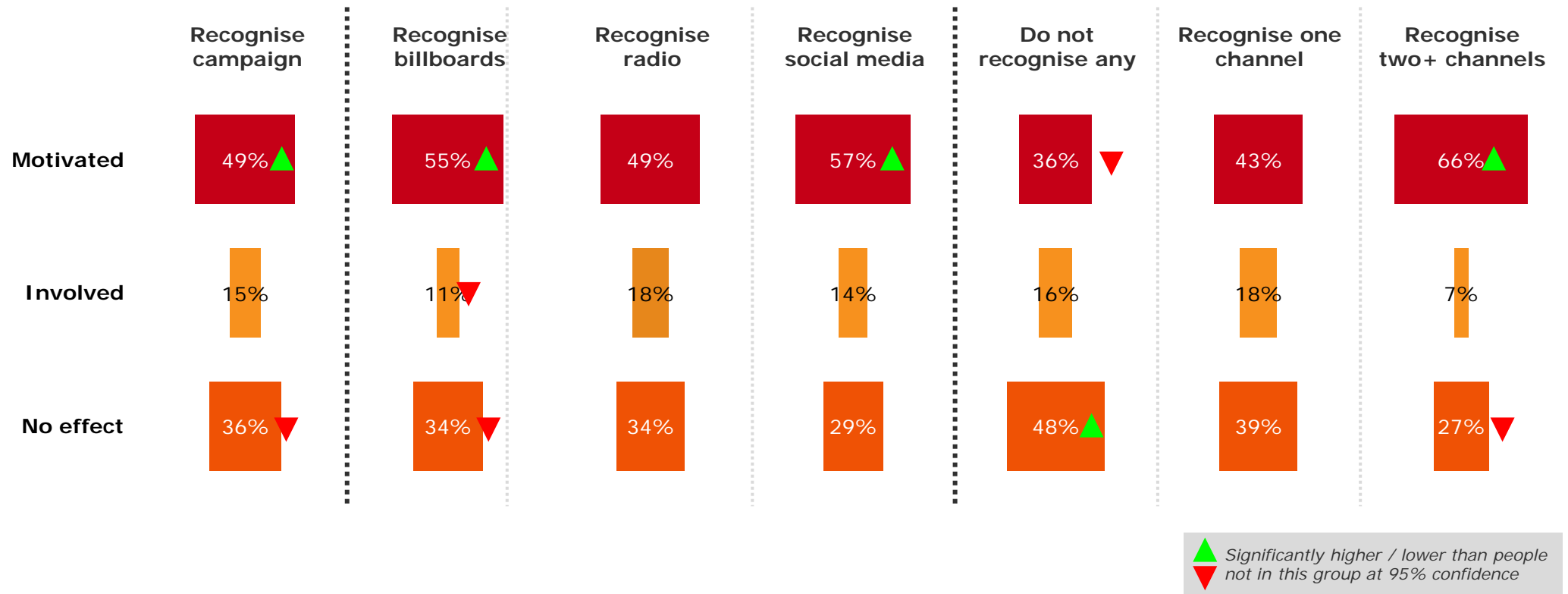


Social ad benchmarks	Anti-drinking (post-test)	Anti-smoking (post-test)	Mental health (pre-test)	Mental health (pre-test)	Home safety (post-test)	Comments
Motivated	37%	39%	53%	52%	45%	Tune-out profiles can be observed for social campaigns addressing social 'problems', whereby large proportions for the 'no effect' segment reflect people thinking the ad/campaign doesn't apply to them. This does not mean however that it is not possible to achieve a 'motivating' profile shape.
Involved	18%	18%	7%	8%	39%	
No Effect	39%	37%	39%	40%	16%	
Profile shape	Tune-out	Tune-out	Tune-out	Tune-out	Motivating	

Base: New Zealand road users aged 18 plus that recognise the 'Safer Speeds Enforcement' campaign when prompted. Sample size: n = 227. Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording is proprietary to TNS.

# Billboards and social media are most motivating, as is using a combination of channels

## Short term impact by campaign awareness



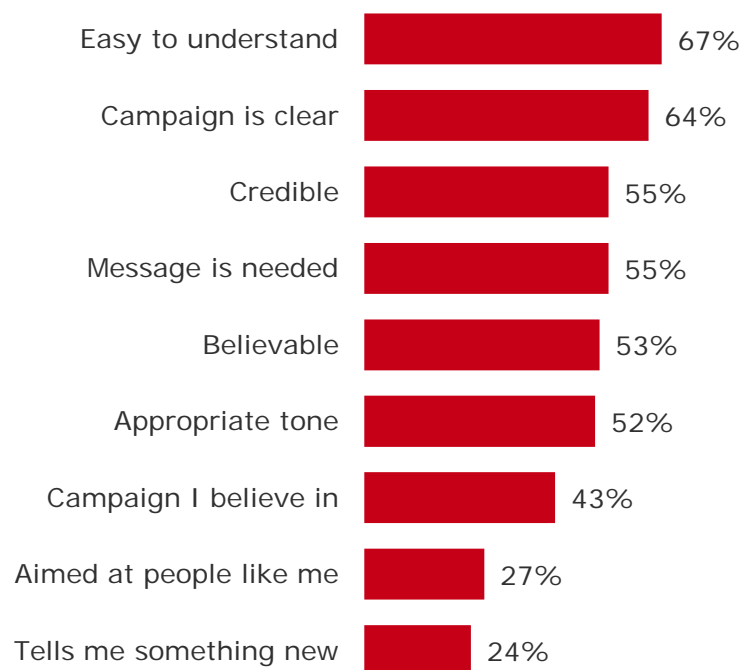
Base: New Zealand road users aged 18 plus, by channel recognition. Sample size: Campaign, n = 277; Billboards, n = 174; Radio, n = 80; Social media, n = 42; Do not recognise, n = 274; Recognise one, n = 165; Recognise two+, n = 62. Question wording is proprietary to TNS.



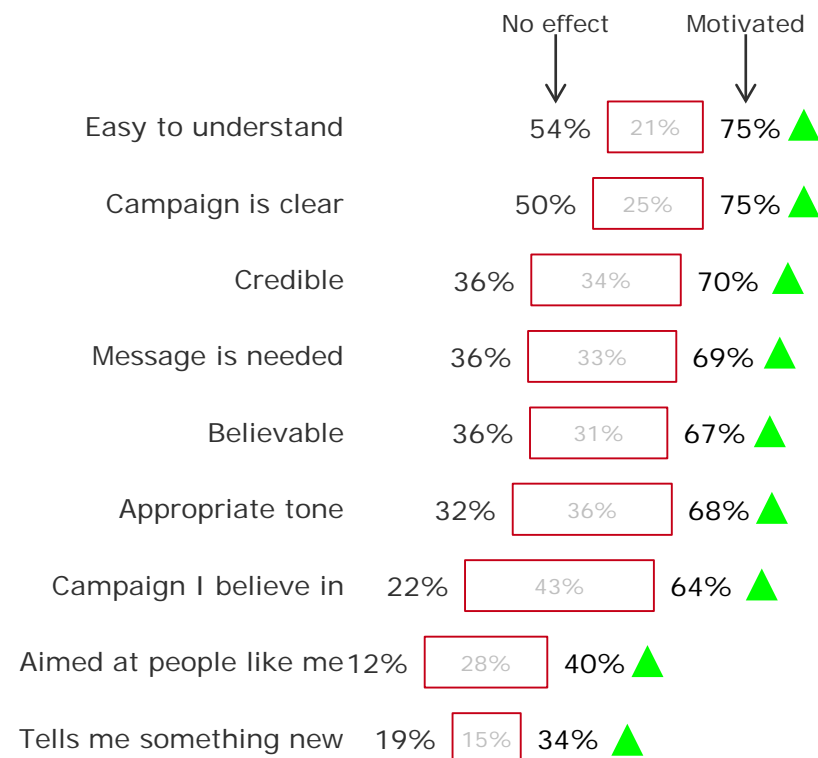
Of all diagnostics, the campaign performs best on being easy to understand whilst the biggest gap between those that are motivated or not is on belief in the campaign

## Campaign diagnostics (%)

% of road users that thought the campaign was ...



## Gap analysis on campaign diagnostics – motivated vs. no effect



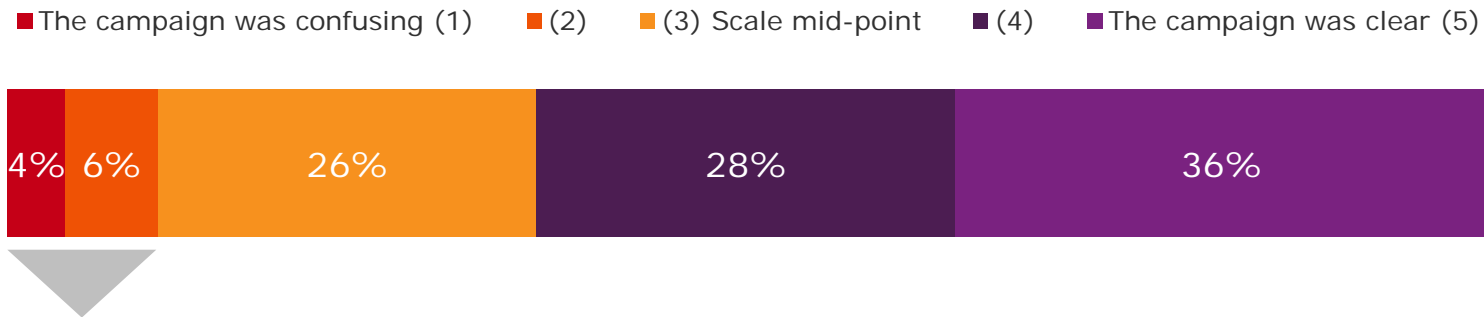
▲ Significantly higher / lower than the 'no effect' group at 95% confidence

Base: New Zealand road users aged 18 plus. Sample size: n = 501. Base: New Zealand road users aged 18 plus, by motivation. Sample size: Motivated, n = 207; No effect; n = 197. Question wording: "Please look at the scale on this page. Here are two opposite ways in which someone could describe this road safety campaign. I'd like you to tell me which number on the scale best describes what you personally feel about this campaign. You can use any number from 1 to 5."

# Very few NZ road users claimed to find the campaign confusing, which mostly related to doubt around the speed enforcement threshold

## Campaign confusion

Confusion is statistically higher among those living in Christchurch and among those who drive a large work vehicle



### Why?

"Well on the campaign the message was **zero tolerance** for speeding but when the cops were interviewed they said it has been the same **4km/hr speeding limit**... make your mind up and let people know"

"I wasn't sure if there was a **4km tolerance on speeding or not**. As I heard one ad was zero tolerance and another was 4km"

"Once they say **no tolerance** and a week later they say allowance of **4kph over is ok**"

"The **speed you will be ticketed and then the limit**. Was not enforced the way they said. They were just out to make money not save lives look at the road toll"

"This has been in the media already as **people were confused and the police did not advertise themselves clearly**, I think this campaign was a WASTE of money and could have been done more effectively"

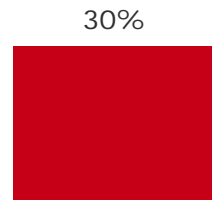
"The **ambiguity of the wording** of the message"

Base: New Zealand road users aged 18 plus. Sample size: n = 501. Question wording: "Please look at the scale on this page. Here are two opposite ways in which someone could describe this road safety campaign. I'd like you to tell me which number on the scale best describes what you personally feel about this campaign. You can use any number from 1 to 5."

Those aware of media coverage about the campaign largely took away off-strategy messages, as far as the intentions of the campaign are concerned

## Recall of news media coverage about the 'Safer Speeds Enforcement' campaign among all road users

Those motivated by the campaign, are less likely to recall off-strategy messages (41%)



### Among those that recall media coverage ...

<b>Off-strategy messages</b>	<b>55%</b>
■ Zero tolerance	22%
■ Confusing	11%
■ Failure	9%
■ Other negative	13%
<b>Neutral</b>	<b>32%</b>
<b>On-strategy messages</b>	<b>13%</b>
■ Slow down	5%
■ Speed kills	3%
■ Increased police	3%
■ Other positive	2%

Base: New Zealand road users aged 18 plus. Sample size: n = 501. Base: New Zealand road users aged 18 plus that recall media coverage. Sample size: n = 149. Question wording "Do you recall seeing, hearing or reading anything specifically about this campaign in the news or media?", "And what do you recall seeing or hearing?"

# 6

## Campaign impact on attitudes & behaviours



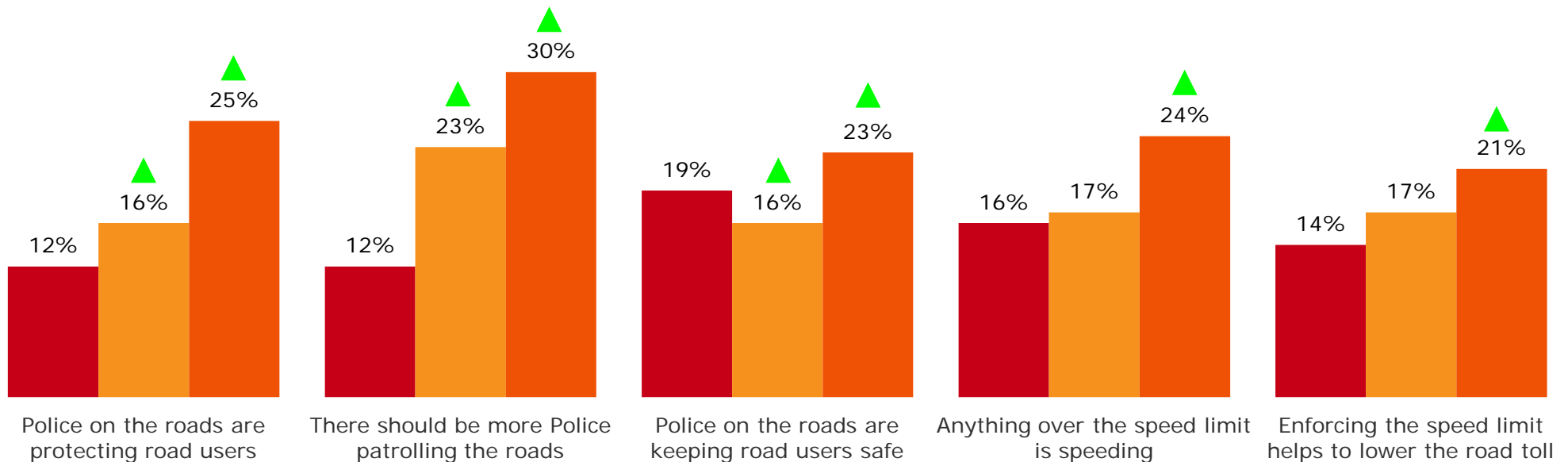
# Campaign impact on attitudes & behaviours – key findings

- There is a correlation between being motivated by the campaign and agreeing that 'anything over the speed limit is speeding' – as well as other attitudes towards Police enforcement of road safety
- Those recalling and motivated by the campaign are also more likely to have made positive changes to their driving behaviour over the December / January period
  - In particular, 'keeping an eye on my speed', 'slowing down my speed', 'becoming more considerate of other road users' and 'overtaking less' are the actions more likely taken amongst those recalling and being motivated by the campaign
- Perceptions of other road users' behaviour is also more likely to be more favourable amongst those recalling and being motivated by the 'Safer Speeds Enforcement' campaign
- However, perceptions of what speeds should be classed as speeding across a range of road types are no different amongst those who recall the campaign or are motivated by it than all New Zealand road users
- Further, the proportion of New Zealand road users who perceive speeding to be any speed within 4km/h of the speed limit is consistent across all groups

Positively, there is a correlation between being motivated by the campaign and agreeing that 'anything over the speed limit is speeding'

### Levels of strong agreement with attitudes towards road policing (% that "strongly agree")

- All road users
- Recognise the campaign
- Recognise and motivated by the campaign



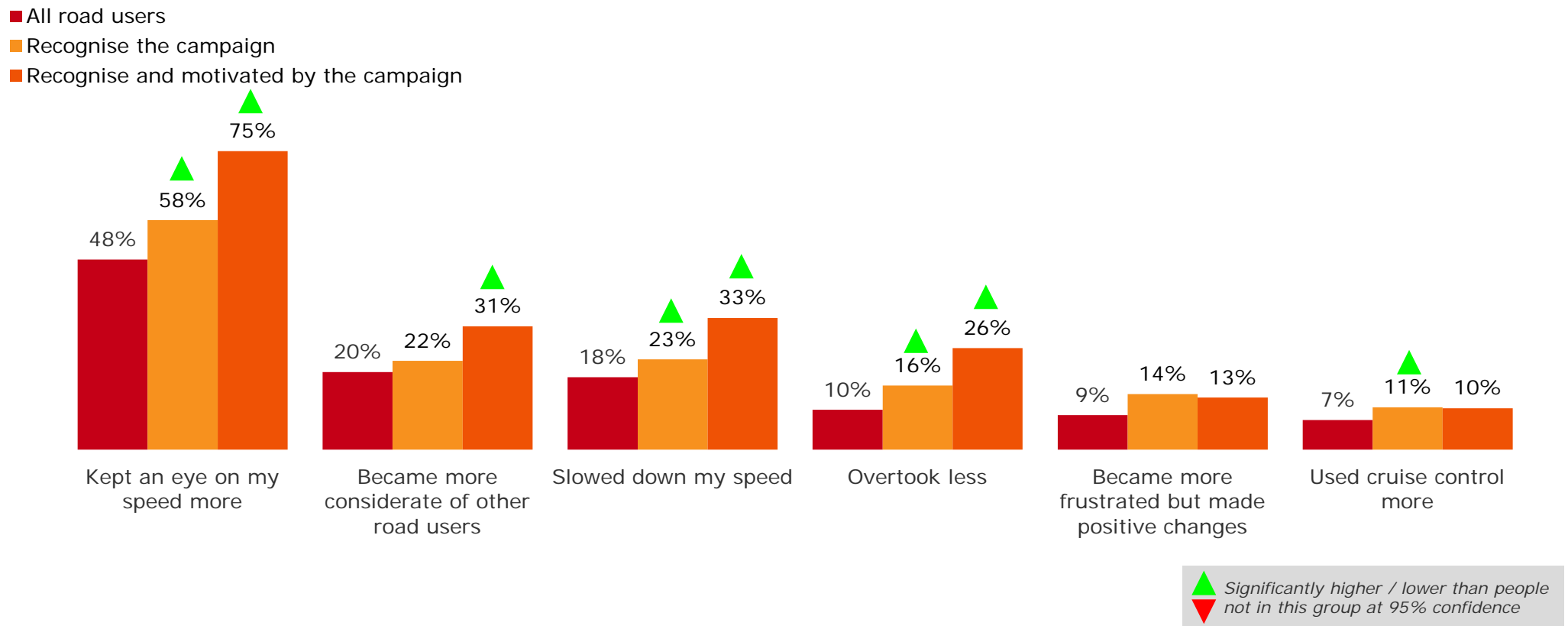
Whilst awareness is correlated with more favourable attitudes towards road policing, only those motivated by the campaign were more likely to agree that 'anything over the speed limit is speeding' and 'enforcing the speed limit helps to lower the road toll'

▲ Significantly higher / lower than people not in this group at 95% confidence

Base: New Zealand road users aged 18 plus, by campaign recognition and motivation. Sample size: All road users, n = 501; Recognise, n = 227; Recognise and motivated, n = 114. Question wording: "And now we would like your opinion on some statements about road safety. Please indicate whether you agree or disagree with each statement below."

Furthermore, motivated people are more likely to claim they have made positive changes to their driving behaviour for the Dec / Jan period...

### How road users claim to have changed their driving behaviour for the Dec-14/Jan-15 period (multiple response, %)



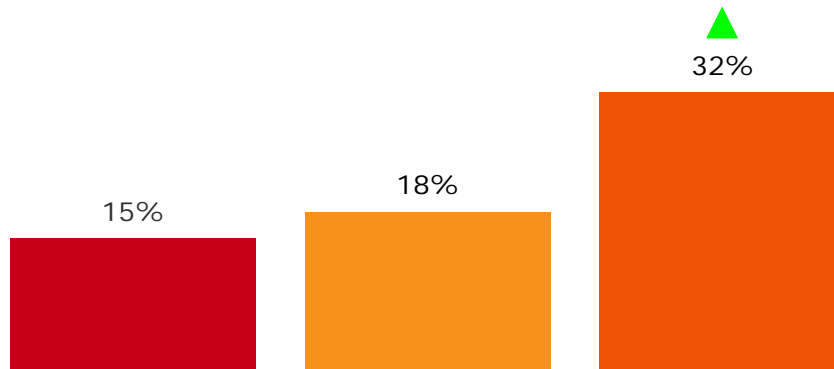
Base: New Zealand road users aged 18 plus, by campaign impact. Sample size: All road users, n = 501; Recognise the campaign, n = 227; Recognise and motivated, n = 114. Question wording: "And how would you say your own driving changed, if at all, over the recent December / January period?"

... And they are also more likely to feel that they and others were driving more safely over the Dec/Jan period

## Perceptions of how people were driving over Dec/Jan (% more / much more safely)

### My own driving

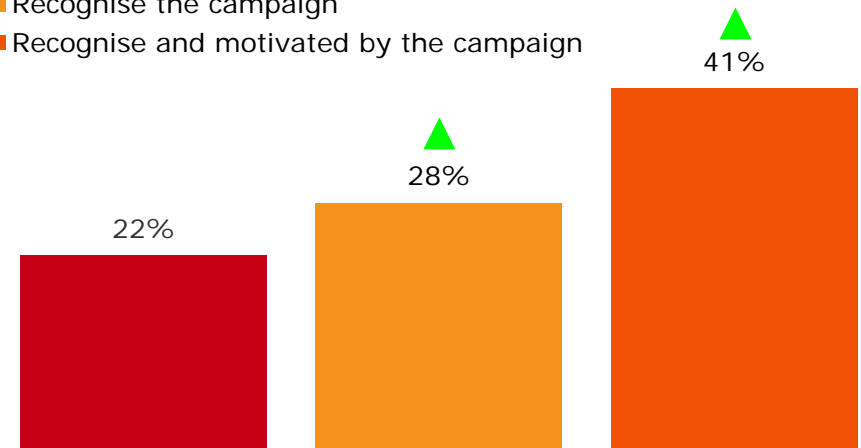
- All road users
- Recognise the campaign
- Recognise and motivated by the campaign



## Perceptions of how people were driving over Dec/Jan (% more / much more safely)

### Other peoples' driving

- All road users
- Recognise the campaign
- Recognise and motivated by the campaign



▲ Significantly higher / lower than people not in this group at 95% confidence

Base: New Zealand road users aged 18 plus, by campaign recognition and motivation. Sample size: All road users, n = 501; Recognise, n = 227; Recognise and motivated, n = 114. Question wording: "Thinking about your own personal experience driving or riding on roads over the recent December / January period. Compared to other times you drive or ride would you say you felt...", "And how would you say other road users were driving or riding compared to other times? Would you say they were driving or riding...", "And how would you say your own driving changed, if at all, over the recent December / January period?"

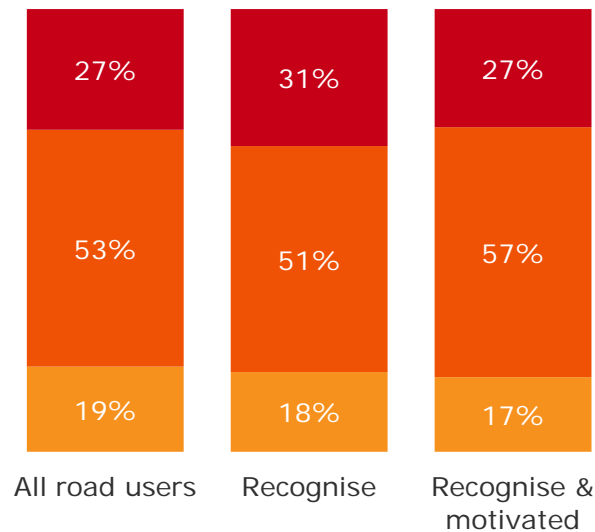


Whilst what is seen to be speeding is consistent across all, regardless of campaign impact ...

## Perception of speeding by campaign impact (threshold groups km/hour)

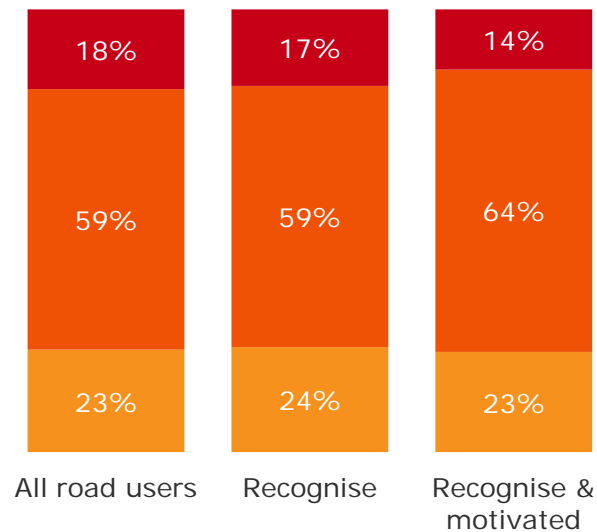
### Open road

- 111 km +
- 105-110 km
- 101-104 km



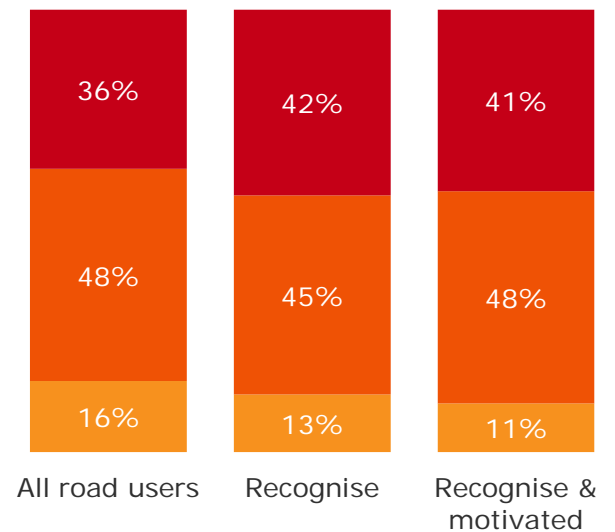
### Towns / cities

- 61 km +
- 55-60 km
- 51-54 km



### Motorway

- 110 km +
- 105-109 km
- 101-104 km



▲ Significantly higher / lower than people not in this group at 95% confidence

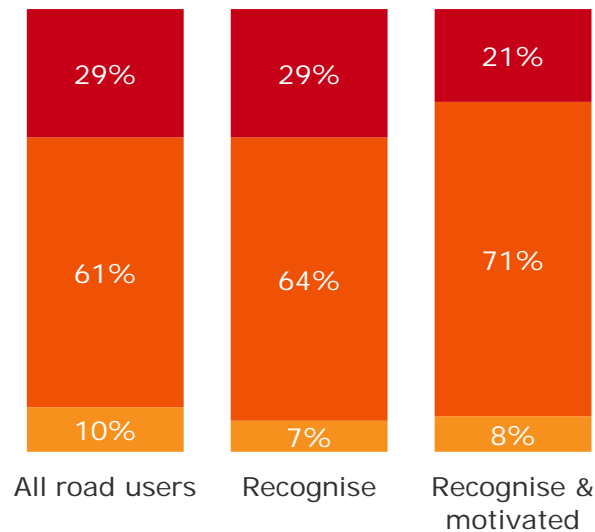
Base: New Zealand road users aged 18 plus by campaign recognition. Sample size: Recognise, n = 227; Do not recognise, n = 274. Question wording for each environment: Speeding, "What speed would you consider to be speeding? I.e. driving/riding at what speed?"; Ticket issue, "And at what speed do you think people should receive a speeding ticket?"

... there are encouraging signs in that acceptance of enforcement of levels up to 110km/h on the open road is high (79%) among those motivated by the campaign

## Perception of when ticket should be issued by campaign impact (threshold groups km/hour)

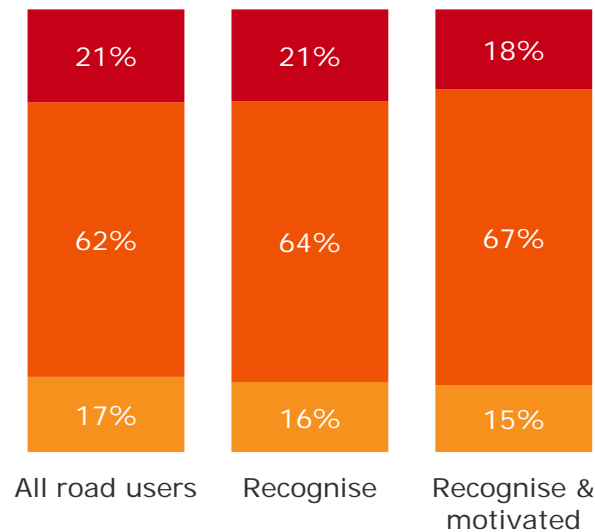
### Open road

- 111 km +
- 105-110 km
- 101-104 km



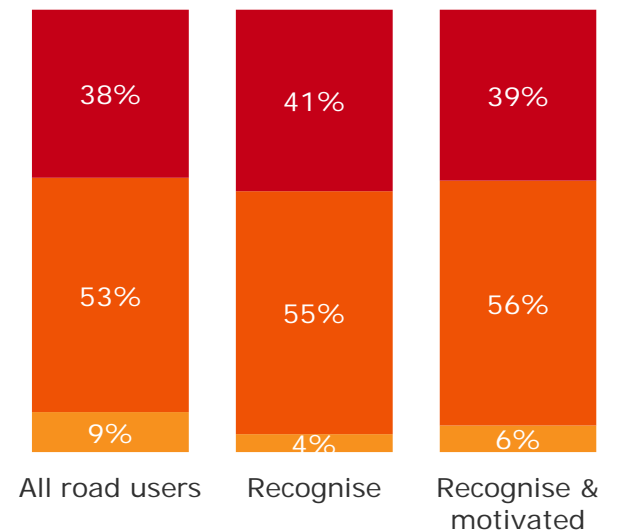
### Towns / cities

- 61 km +
- 55-60 km
- 51-54 km



### Motorway

- 111 km +
- 105-110 km
- 101-104 km



▲ Significantly higher / lower than people not in this group at 95% confidence

Base: New Zealand road users aged 18 plus by campaign recognition. Sample size: Recognise, n = 227; Do not recognise, n = 274. Question wording for each environment: Speeding, "What speed would you consider to be speeding? I.e. driving/riding at what speed?"; Ticket issue, "And at what speed do you think people should receive a speeding ticket?"

# 7

## Appendix



# 7.1

About TNS



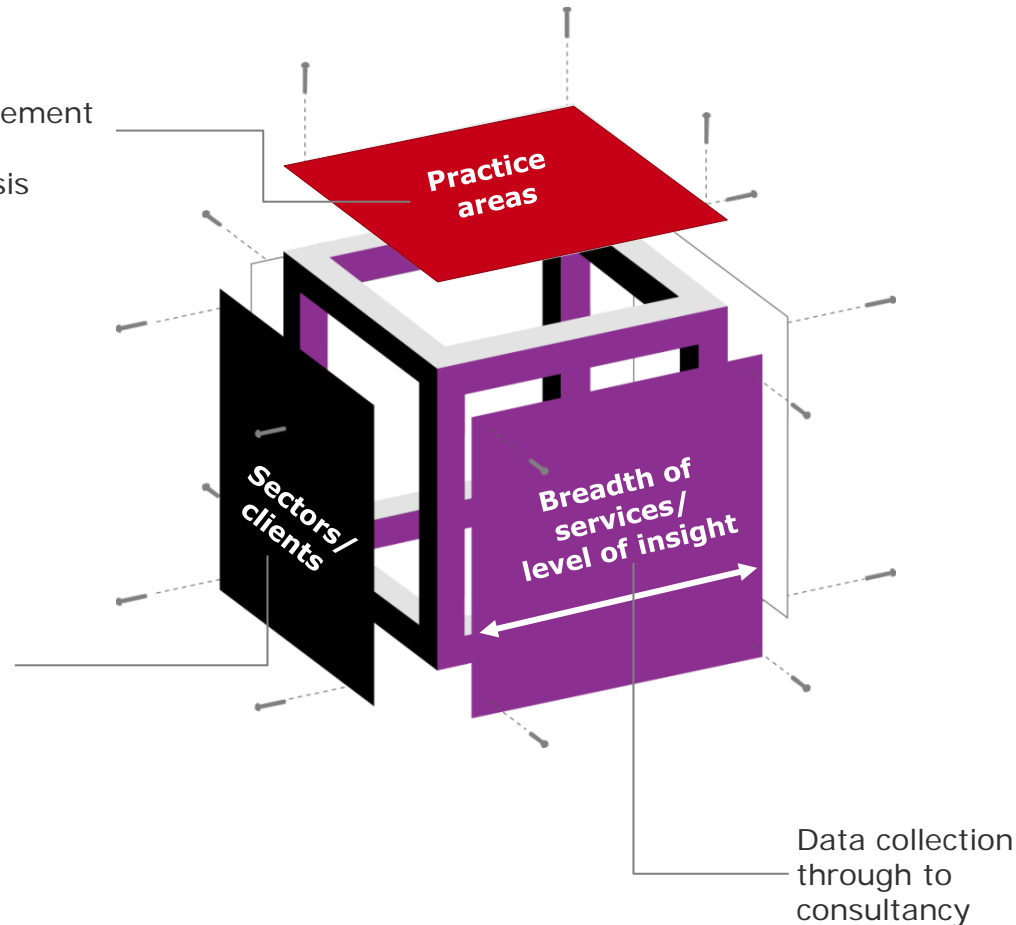
TNS Brand & Communications  
'Safer Speeds Enforcement' campaign

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TNS is a global custom market research firm that is part of the WPP network; here in New Zealand we operate a full service agency that has extensive capability and experience across a wide range of services

- Brand
- Comms
- IPD
- Stakeholder management
- Retail/shopper
- Market entry analysis
- Social
- Qualitative

- Retail
- FMCG
- Technology
- Media
- Primary
- Finance
- Government/ social
- Utilities
- Travel and tourism



- Qualified, smart, experienced people
- Part of a global network
- Best practice IP and tools
- Best practice process
- Guided by industry standards set by Research Association New Zealand and ESOMAR

# 7.2

About SmileCity™



TNS Brand & Communications  
'Safer Speeds Enforcement' campaign

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# About SmileCity™

- SmileCity™ is one of the largest market research panels in New Zealand, with over 430,000 registered members and an active panel of over 245,000 members. More than 2,000 online studies have been successfully completed via SmileCity™ including large trackers and low incidence projects.
- SmileCity™ has developed and continues to maintain an 'actively managed' panel which adheres to a strict "research only" policy governed by industry bodies such as ESOMAR, AMRO and MRSNZ. The minimum criteria for an active panel member includes being recruited from a documented source and having completed a double opt in registration.
- To ensure coverage of hard-to-reach groups on the internet the panel has been recruited from a wide range of offline and online media sources, and is continuously refreshed. Approximately half (51%) of the panel has been recruited from offline media including national television, magazine and radio advertising. The remaining half (49%) has been recruited from a wide range of online sources such as website banner ads.
- Panellists on SmileCity™ receive guaranteed reward points for each survey they participate in commensurate with the average length of the particular survey. In addition, a lower number of points are awarded to all respondents who screen out a survey due not fitting criteria or quota full. Points can be converted into rewards (cash or gift vouchers) or panellists can elect to make charitable donations with their points. SmileCity™ is careful not to over-incentivise, as this has been shown to attract 'professional respondents'.
- Response rate is measured by looking at the number of people who start the survey from those that have been invited (not including non-delivered emails). SmileCity™ has an overall start rate of 30% on an aggregated level. However this can be as high as 50%-70% dependent on factors such as length and the type of survey.
- A representative New Zealand sample can be achieved by careful selection of panel members to invite to the survey and by applying quotas at the interviewing stage. The size of the SmileCity™ panel in terms of over 245,000 active members allows for nationally representative sample to be drawn for large and detailed sample sizes.
- For more information about SmileCity™, please direct enquiries to TNS New Zealand.