

## 2017 RESEARCH

The 2017 Better Conversations on Road Risk research sought to understand New Zealanders' attitudes to road safety, road risk and potential safety solutions.

### OTAGO PACK

This pack includes:

- National quantitative research summary
- Qualitative research summary
- National segmentation
- Otago quantitative research summary
- Southern region (Otago & Southland) quantitative research summary
- Dunedin quantitative research summary
- Otago Towns quantitative research summary
- Rural Otago quantitative research summary
- Otago segmentation



# National research summaries



# National quantitative research summary: Identifying community conditions that lead to safe choices



## RESEARCH PURPOSE

To better understand New Zealanders' attitudes to road safety, road risk and potential safety solutions.

## RESEARCH METHOD

Nationally representative online and phone survey, April – May 2017.

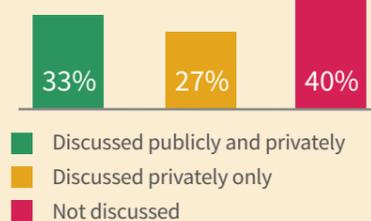
Online survey of  
**3,112**  
residents

This sample provides a +/-2% margin of error

## Some conversations are taking place

Most people (60%) are talking about road risk/safety, with 33% doing so publicly. Over half (54%) agree conversations can improve safety, but don't agree the risks currently discussed are the right ones (58%).

### Where are people discussing road safety?



### Do conversations improve safety?

**54%**  
of the nation agree or strongly agree

**Conversation**  
Are people talking about road risk?

**Confidence**  
How well are road risks and solutions understood?

## Confidence identifying road risk varies

43% of people can confidently identify a local road risk.



### Top three perceived road risks

- 1) Careless or reckless driving (72%)
- 2) Drivers making mistakes (65%)
- 3) Travelling fast (62%)

**Choices**  
Are safer choices being made or supported?

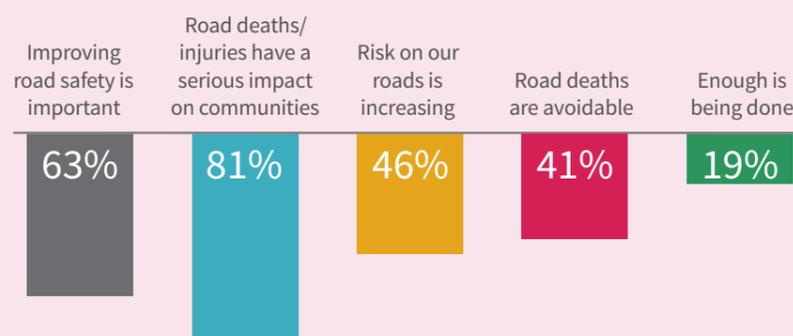
## Safer choices are not always supported

56% of people believe improving enforcement is an effective solution.

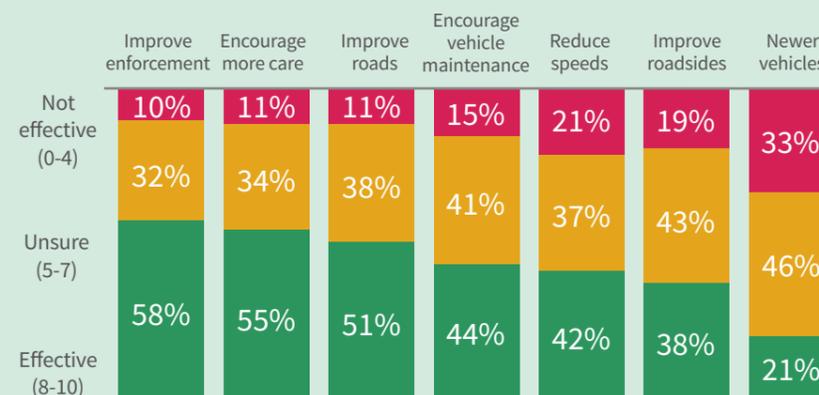
## Communities care about road safety

Relative to other community issues, improving road safety ranks fifth. 63% believe improving road safety is important.

### How many people agree or strongly agree with the following statements?



### People's belief of the effectiveness of road safety solutions



## RESEARCH FINDINGS

New Zealanders care about road safety, but many believe deaths are unavoidable. Most believe community conversations will lead to improved safety yet few agree the right road risks are being talked about. Understanding of road risk varies, leading to uncertainty about the most effective solutions.

## IMPLICATIONS

Lives can be saved when communities and individuals make safer choices.

There are two key barriers to safer choices:

- a lack of care based on the belief that road deaths are unavoidable.
- a lack of understanding of road risk and effective solutions.

Current community conversations do not support increased engagement in road safety. They:

- tend to amplify blame on others and stereotyping.
- are not trusted (i.e. media or expert driven, not local or evidence based).
- are not always visible (i.e. either not happening or not public).
- reinforce entrenched positions.

Better conversations about road risk are needed.

We need to encourage conversations that:

- increase the visibility of local community care (via story telling and public commitments).
- build evidence based understanding of risks.
- build optimism that deaths can be avoided.
- facilitate collaborative solutions.

Better conversations create a more positive environment for communities to make and support a greater number of safer choices.

# Qualitative research summary: Understanding community conditions that lead to safe choices



## RESEARCH PURPOSE

To provide an in-depth understanding of peoples' attitudes to local road risk, hazard awareness and prioritisation, and potential safety solutions.

## RESEARCH METHOD

Eight focus groups with local residents in: Invercargill, Gore, Dunedin and Ranfurly.

## KEY IMPLICATIONS

Believing road deaths are avoidable plays an important role in determining people's road safety outlook.

Better conversations about local road risk and their solutions can create greater community optimism and support for safer choices.

To do this the community impact of road trauma needs to be made visible.

The issue needs to be personable and communities need more local, objective and trusted information to develop a shared understanding of road risk.

## Conversations taking place but are based on limited information

- People talk about road risk with family, friends and work colleagues.
- These informal conversations are seen to be unproductive (due to bias/incomplete information sources and few solutions).
- Better community conversations are needed to progress solutions, supported by good, local and objective information.

*"We talk a lot about it, but I think that is where it stops. I don't see any change. It's just one of those things"*

**Conversation**  
Are people talking about road risk?

## Knowledge of local risks varies

- Our knowledge of road risk is mixed, based on information seen as incomplete and biased (primarily safety messages, media, personal experiences/observations and conversations).
- The most concerning risks involve other drivers and rural roads (especially in combination). With most proposed solutions focusing on improving driver skills or knowledge.
- Road risks are local – the solution to a risk in one community may not be relevant in a neighbouring one.

*"I don't know if we necessarily get a balanced view as to what are the triggers or the causes"*

**Confidence**  
How well are road risks and solutions understood?

## Communities care. But are there solutions?

- Communities agree that risks are getting worse, road deaths are not acceptable and more needs to be done.
- Communities are divided on whether serious crashes are avoidable, and this has flow-on effects on the urgency, seriousness and acceptance of road risk.
- Those who believe serious crashes are avoidable are more aware of possible solutions and have had closer proximity to the consequences of road crashes.

*"I think it's probably a defeatist attitude. But not because we are that type of person"*

**Care**  
Is road safety an important community issue?

## Safer choices not always supported – fatalism plays a part

- Those who believe serious crashes are unavoidable are less likely to support safety changes that affect them personally (e.g. speed limit reduction), are more likely to blame the driver and are more likely to feel driving over the limit is safe if they are careful.
- Conversely, those who believe crashes are avoidable are more likely to consider and support a wider range of safety solutions.

*"My concern is that you can drive to the conditions on the road, but you can't drive for the idiot coming towards you"*

**Choices**  
Are safer choices being made or supported?

# How New Zealanders are different in important ways: Road risk segments



## RESEARCH PURPOSE

To better understand New Zealanders' attitudes to road safety, road risk and potential safety solutions.

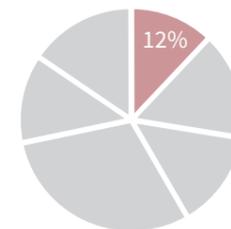
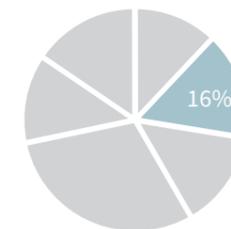
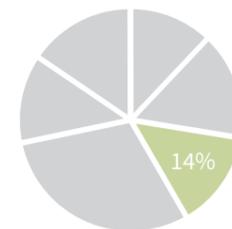
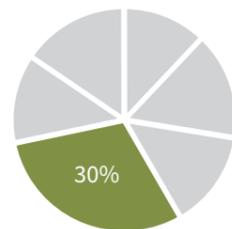
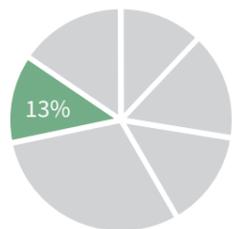
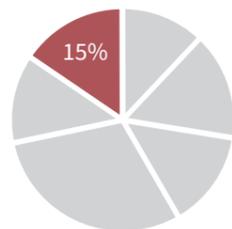
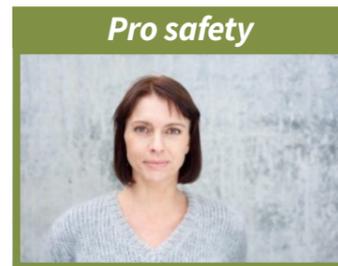
## RESEARCH METHOD

Survey of 3,112 residents (online and phone). Nationally representative sample. Data collected April – May 2017.

Online survey of  
**3,112**  
residents

## KEY FINDINGS

New Zealanders differ to the extent to which they care about improving road safety, are having conversations, can confidently identify road risks and support potential safety choices (such as reducing speed limits). This segmentation provides some insight into these differences.



- One of the most vocal voices in the community and strongly oppose speed limit reduction.
- Confident they can identify road risks and judge the best speed for the road.
- Prefer road improvements over speed limit reduction.
- More likely to agree road deaths are unavoidable.
- Less likely to believe community conversations can lead to safer outcomes.
- More likely to be NZ European, over 50 years old and live in a small town.
- Drive for their jobs on all types of roads.

- Most concerned with road safety and highly supportive of speed limit reductions.
- Agree some roads are not safe at the set speed limit.
- Most likely to believe road deaths are avoidable.
- Most likely to identify road risks and solutions with a high level of confidence.
- Strongly believe more community conversations will improve safety outcomes.
- More likely to be female, NZ European, over 50 years old and live outside the city.
- More likely to have had someone close to them who has been in a serious crash.

- Concerned about road risk and have conversations about it, but are less confident in their understanding of road risk and solution.
- They are more likely to believe community conversations will improve safety.
- Understanding there is a range of local solutions available is important to this segment.
- More likely to be female and have school aged children.
- They're more likely to use public transport and drive for their job.
- More likely to have had someone close to them who has been in a serious crash.

- Concerned about road risk and support speed limit reductions.
- Do not have public conversations about road safety.
- Have a lower confidence in their understanding of risk and solutions.
- Agree more community conversations may make the roads safer.
- More likely to be male, in their 30s, Asian and be students.
- Less likely to drive or be a passenger in a car.
- Less likely to be personally affected by a crash.

- Believe improving road safety is important but are less concerned than other segments.
- Less likely to state road deaths are avoidable.
- Less aware of road safety messages and tend to not talk about road risk.
- Less likely to agree community conversations will lead to safer outcomes.
- More likely to be under 30 and male.
- Less likely to drive and tend not to be personally affected by a crash.

- Least likely to believe improving road safety is important.
- Most likely to agree road deaths are unavoidable.
- More likely to drive above the speed limit and are highly opposed to speed limit reduction.
- Do not have conversations about risks and are less likely to confidently identify road risks and solutions.
- More likely to be under 30, male and NZ European.
- More likely to live in large towns, with other young people and travel by car.
- More likely to travel on state highways and less likely to travel on rural roads.

## ENGAGING THESE GROUPS

### NIMBY vs Slow your roll

NIMBY and Slow your roll are likely to be the more vocal and engaged segments in the community.

- Constructive conversations (where both agree) are more likely to be around the idea that:
- Travel speed should match road risk
  - Improving roads is an effective solution

- Divisive conversation (where segments disagree) are more likely to be around the idea that:
- Speed reduction is an effective solution
  - Improving enforcement improves safety

### Pro safety & Privately pro safety

Pro safety's and Privately pro safety's positive attitude towards road safety would benefit from a greater understanding of road risks and solutions, in order to increase their confidence in conversations and to encourage more of them to agree that road deaths can be avoidable.

### Middle of the road

This segment may benefit from greater understanding of road risks and solutions – it may help them shift them from being largely neutral to more engaged, confident and supportive of safer choices.

### Life in the fast lane

This segment is unlikely to engage in conversations on road safety, but their thoughts are echoed through NIMBYs. We could engage this group by linking messages to the lasting impact deaths have on communities.

# How New Zealanders are different in important ways: Road risk segments



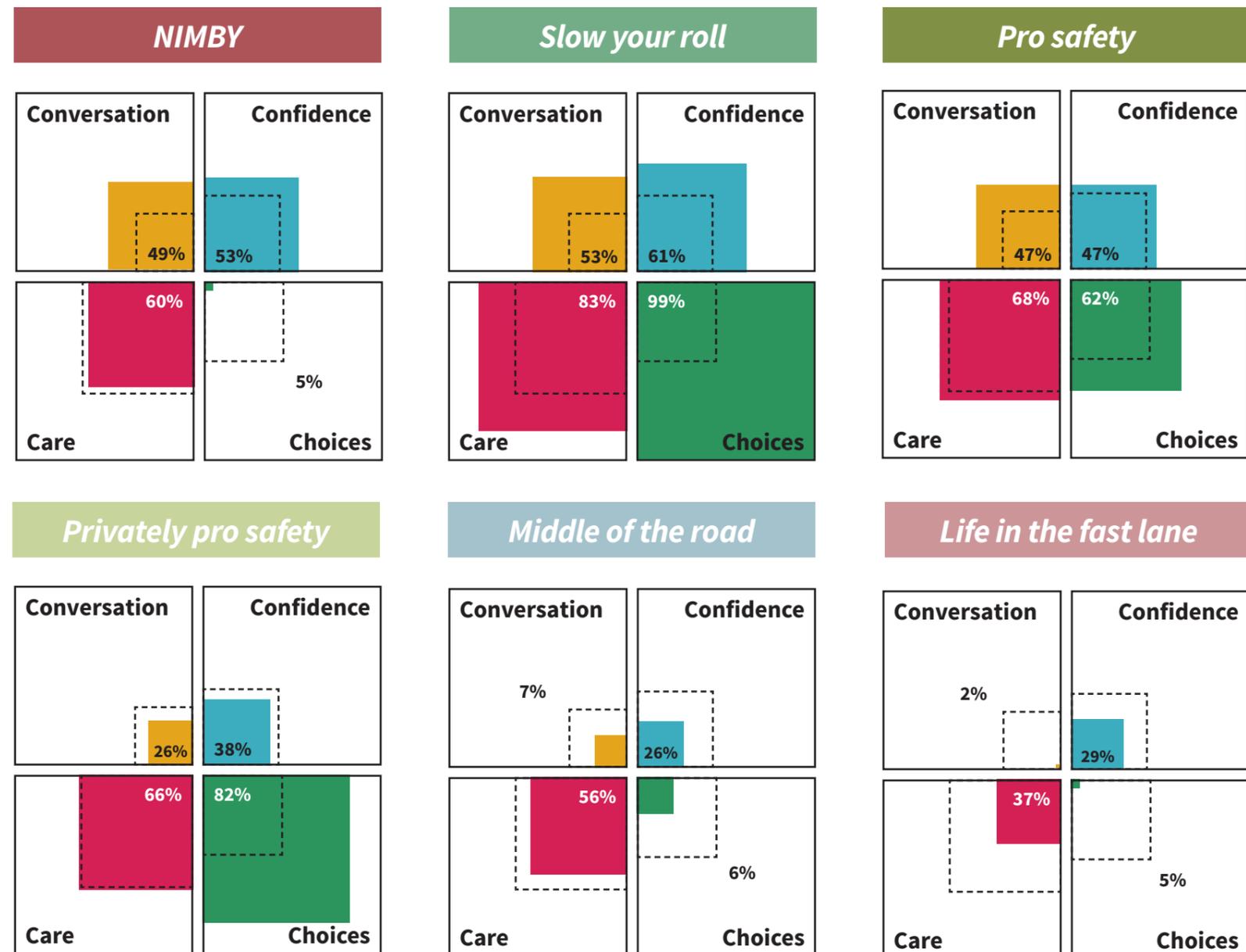
This page highlights some important differences between segments based on the following four key measures.

- The extent to which a person has had a **public conversation** about road safety or road risk in the last three months. This could be through social media, by commenting on a news story, or talking about safety at work or in public places.
- The level of **confidence** a person has in identifying a local road risk
- The safety **choices** they support (in this case their support for reducing speed limits)
- Levels of **care** (% who give 8, 9 or 10 on a 10 point importance scale)

## How to interpret the boxes

The coloured boxes show the segment score. The dotted line shows the national average for each of the four measures. This is to help you compare.

As an example of how to interpret this information, if the yellow box is larger than the dotted line, that segment is more likely to be having public conversations about road risk than the average person.



# Otago research summaries



# Otago quantitative research summary: Identifying community conditions that lead to safe choices



## RESEARCH METHOD

Survey of  
**433**  
Otago residents

### Otago sample:

Collected as part of the national 2017 Better Conversations on Road Risk survey

### National sample:

3,112 respondents  
Providing a +/-2% margin of error

Representative by region, age and gender

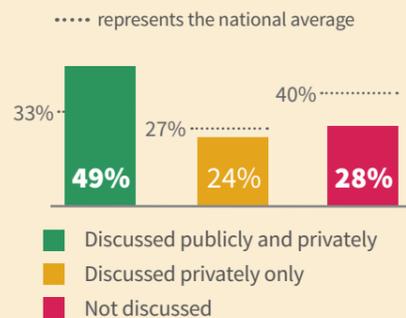
Collected online and by phone

Conducted April – May 2017

## Some conversations are taking place

Most people (72%) are talking about road risk/safety, with 49% doing so publicly. Most (60%) agree conversations can improve safety.

### Where are people discussing road safety?



**Bold numbers** are shown when the result is significantly different from the national average.

### Do conversations improve safety?

**60%**

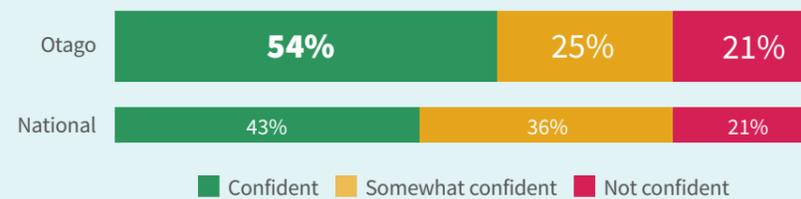
of Otago agree or strongly agree  
54% Nationally

**Conversation**  
Are people talking about road risk?

**Confidence**  
How well are road risks and solutions understood?

## Confidence identifying road risk varies

54% of people can confidently identify a local road risk.



**Bold numbers** are shown when the result is significantly different from the national average.

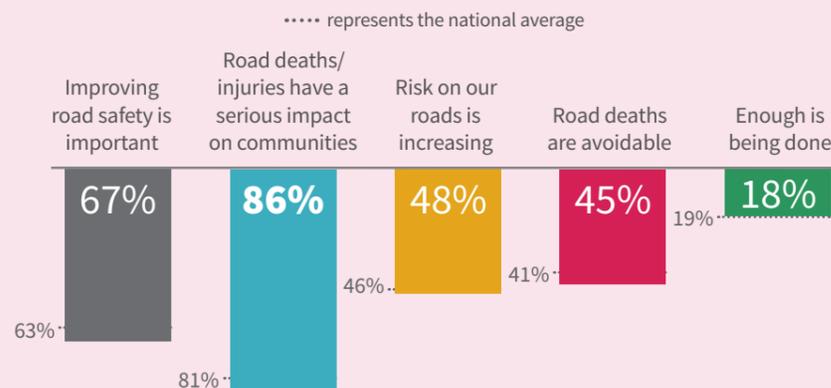
### Top three perceived road risks

- 1) Careless or reckless driving (67%)
- 2) Drivers making mistakes (60%)
- 3) Travelling fast (60%)

## Communities care about road safety

Improving road safety ranks fifth relative to other community issues. 67% believe improving road safety is important.

### How many people agree or strongly agree with the following statements?



**Bold numbers** are shown when the result is significantly different from the national average.

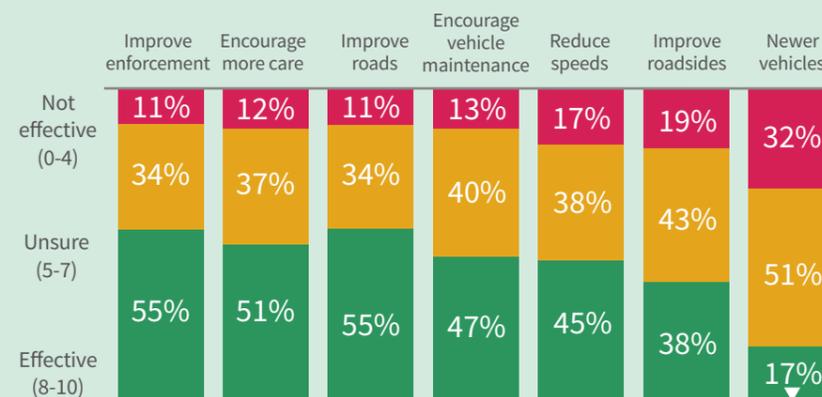
**Care**  
Is road safety an important community issue?

**Choices**  
Are safer choices being made or supported?

## Safer choices are not always supported

17% of people think encouraging newer vehicles is an effective solution.

### People's belief of the effectiveness of road safety solutions



▲ ▼ are shown when the result is significantly higher/lower from the national average. Numbers are rounded to the nearest whole number.

## REGIONAL INSIGHTS

The key differences in Otago compared to the national findings.

**Conversation:** People from Otago are more likely to discuss road risk, and are more likely to do so publicly. They are more likely to feel community conversations improve safety and that current conversations focus on the right risks.

**Confidence:** People from Otago are more confident in identifying road risks. They are more likely to think roads contribute to crashes, compared to the national average, and less likely to think careless driving and speed contribute.

**Choices:** People from Otago have similar views of the effectiveness of safety solutions compared to the rest of New Zealand. They are less likely to think encouraging newer vehicles is an effective solution.

**Care:** People from Otago are more likely to acknowledge the impact of road trauma on communities and think road safety is an urgent issue (53% vs 47% for national average). They are more likely to think roads are safe for local drivers (49% vs 43% for national average), and that some roads are not safe at the current speed limits (44% vs 37% for national average). They are more likely to think their roads are unsafe for overseas visitors (34% vs 24% for national average).

# Southern region (Otago & Southland) quantitative research summary: Identifying community conditions that lead to safe choices



## RESEARCH METHOD

Survey of **795**

Southern region residents

### Southern sample:

Collected as part of the national 2017 Better Conversations on Road Risk survey

### National sample:

3,112 respondents  
Providing a +/-2% margin of error

Representative by region, age and gender

Collected online and by phone

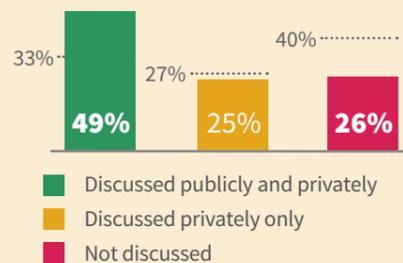
Conducted April – May 2017

## Some conversations are taking place

Most people (74%) are talking about road risk/safety, with 49% doing so publicly. Most (62%) agree conversations can improve safety.

### Where are people discussing road safety?

..... represents the national average



**Bold numbers** are shown when the result is significantly different from the national average.

### Do conversations improve safety?

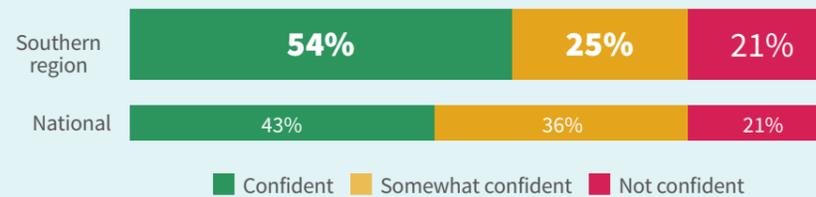
**62%**

of Southern region agree or strongly agree  
54% Nationally

**Conversation**  
Are people talking about road risk?

## Confidence identifying road risk varies

54% of people can confidently identify a local road risk.



**Bold numbers** are shown when the result is significantly different from the national average.

### Top three perceived road risks

- 1) Careless or reckless driving (66%)
- 2) Drivers making mistakes (60%)
- 3) Travelling fast (58%)

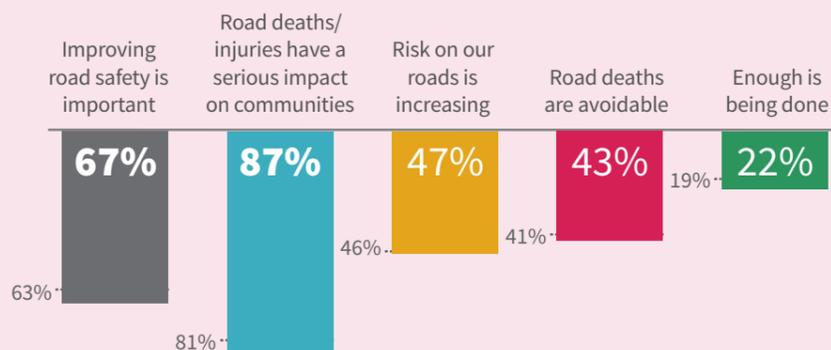
**Confidence**  
How well are road risks and solutions understood?

## Communities care about road safety

Improving road safety ranks fifth relative to other community issues. 67% believe improving road safety is important.

### How many people agree or strongly agree with the following statements?

..... represents the national average



**Bold numbers** are shown when the result is significantly different from the national average.

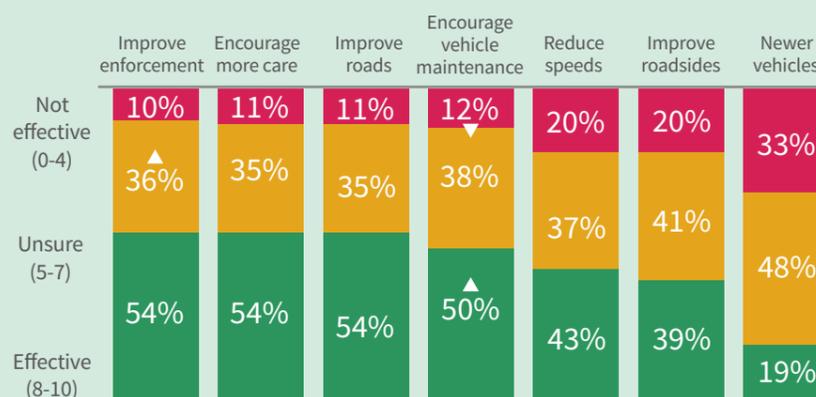
**Care**  
Is road safety an important community issue?

**Choices**  
Are safer choices being made or supported?

## Safer choices are not always supported

50% of people believe encouraging vehicle maintenance is an effective solution.

### People's belief of the effectiveness of road safety solutions



▲ ▼ are shown when the result is significantly higher/lower from the national average. Numbers are rounded to the nearest whole number.

## REGIONAL INSIGHTS

The key differences in the Southern region (Otago and Southland) compared to the national findings.

**Conversation:** People from the Southern region are more likely to discuss road risk in public. They are more likely to feel that community conversations improve safety and more likely to feel that their current conversations focus on the right risks.

**Confidence:** People from the Southern region are more likely to confidently identify risks. They are more likely to think roads contribute to crashes, and less likely to think careless driving and speed do.

**Choices:** People from the Southern region are in line with the rest of New Zealand in their view of the effectiveness of safety solutions, although they are more likely to think encouraging vehicle maintenance is an effective solution.

**Care:** People from the Southern region are more likely to think improving road safety is important, and are more likely to recognise the impact road trauma has on communities.

# Dunedin quantitative research summary: Identifying community conditions that lead to safe choices



## RESEARCH METHOD

Survey of  
**149**  
Dunedin residents

### Dunedin sample:

Collected as part of the national 2017 Better Conversations on Road Risk survey

### National sample:

3,112 respondents  
Providing a +/-2% margin of error

Representative by region, age and gender

Collected online and by phone

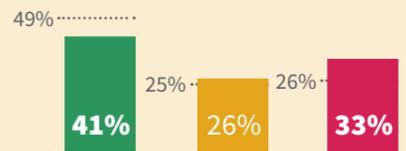
Conducted April – May 2017

## Some conversations are taking place

Most people (67%) are talking about road risk/safety, with 41% doing so publicly. Over half (61%) agree conversations can improve safety.

### Where are people discussing road safety?

..... represents the Southern region's average



■ Discussed publicly and privately  
■ Discussed privately only  
■ Not discussed

**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Do conversations improve safety?

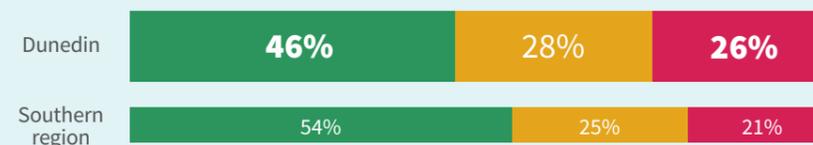
**61%**

of Dunedin agree or strongly agree  
62% Southern region

**Conversation**  
Are people talking about road risk?

## Confidence identifying road risk varies

46% can confidently identify a local road risk.



■ Confident ■ Somewhat confident ■ Not confident

**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Top three perceived road risks

- 1) The road conditions, design or quality (57%)
- 2) Drivers making mistakes (57%)
- 3) Careless or reckless driving (53%)

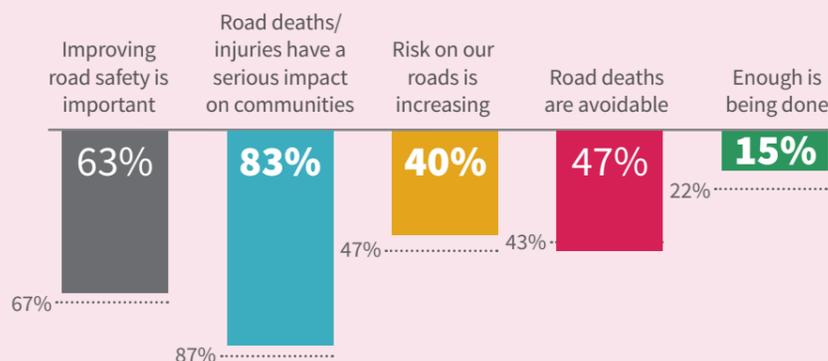
**Confidence**  
How well are road risks and solutions understood?

## Communities care about road safety

Improving road safety ranks seventh relative to other community issues. 63% believe improving road safety is important.

### How many people agree or strongly agree with the following statements?

..... represents the Southern region's average



**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Care

Is road safety an important community issue?

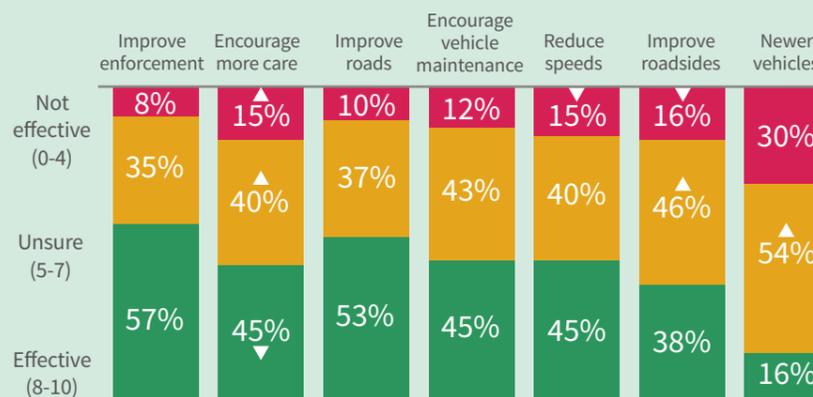
### Choices

Are safer choices being made or supported?

## Safer choices are not always supported

45% of people think encouraging drivers to take more care is an effective solution.

### People's belief of the effectiveness of road safety solutions



▲ ▼ are shown when the result is significantly higher/lower from the Southern region's average. Numbers are rounded to the nearest whole number.

## REGIONAL INSIGHTS

The key differences in Dunedin compared to the Southern region.

**Conversation:** People from Dunedin are less likely to discuss road risk and less likely to think current conversations focus on the right risks.

**Confidence:** People from Dunedin are less confident in identifying road risks. They are more likely to think careless driving contributes to crashes, and less likely to think roads do.

**Choices:** People from Dunedin have similar views of the effectiveness of safety solutions compared to the rest of New Zealand. They are less likely to think encouraging drivers to take more care is an effective solution. They are less likely to prefer investment in roads over speed reduction (49% vs 59% for Southern region).

**Care:** People from Dunedin are less likely (compared to the Southern region) to acknowledge the impact of road trauma on communities. They are less likely to think their roads are safe for local drivers (46% vs 52% for Southern region). They are less likely to think road risk is increasing, and are less likely to think enough is being done.

# Otago towns (small & large) quantitative research summary: Identifying community conditions that lead to safe choices



## RESEARCH METHOD

Survey of **153** Otago town residents

### Otago towns sample:

Otago towns (small and large) is a town with a population under 50,000.

Collected as part of the national 2017 Better Conversations on Road Risk survey.

### National sample:

3,112 respondents  
Providing a +/-2% margin of error

Representative by region, age and gender

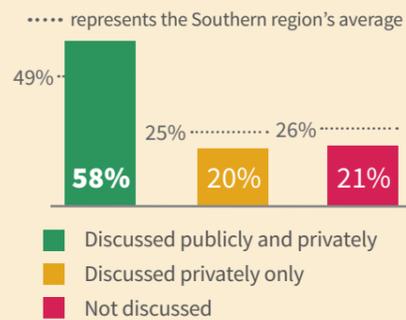
Collected online and by phone

Conducted April – May 2017

## Some conversations are taking place

Most people (78%) are talking about road risk/safety, with 58% doing so publicly. Over half (54%) agree conversations can improve safety.

### Where are people discussing road safety?



**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Do conversations improve safety?

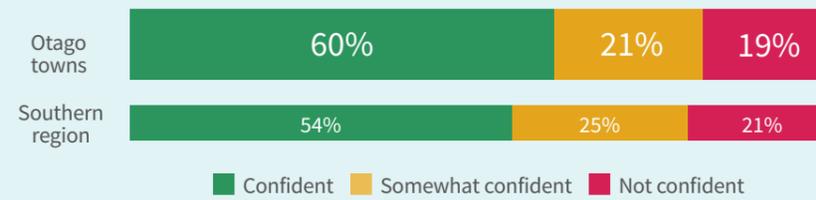
**54%**

of Otago towns agree or strongly agree  
62% Southern region

**Conversation**  
Are people talking about road risk?

## Confidence identifying road risk varies

60% can confidently identify a local road risk.



Legend: Confident (Green), Somewhat confident (Yellow), Not confident (Red)

These results aren't significantly different from the Southern region's average.

### Top three perceived road risks

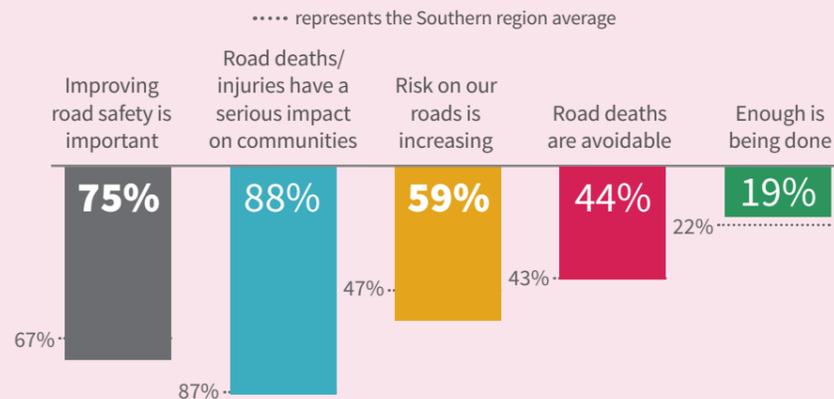
- 1) Travelling fast (63%)
- 2) Careless or reckless driving (61%)
- 3) Drivers making mistakes (59%)

**Confidence**  
How well are road risks and solutions understood?

## Communities care about road safety

Improving road safety ranks first relative to other community issues. 75% believe improving road safety is important.

### How many people agree or strongly agree with the following statements?



**Bold numbers** are shown when the result is significantly different from the Southern region's average.

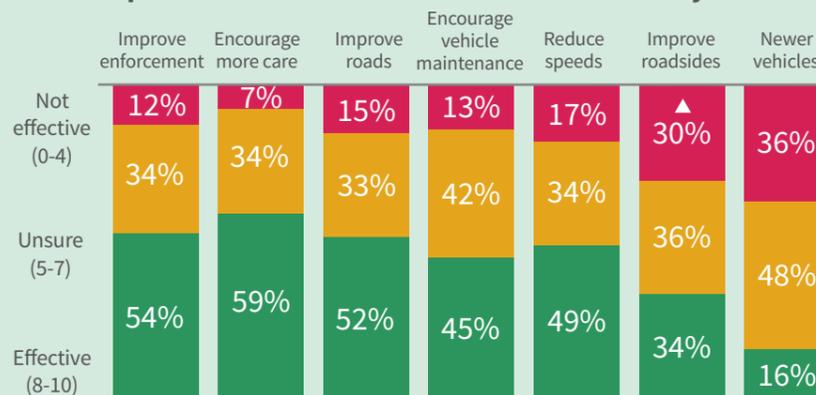
**Care**  
Is road safety an important community issue?

**Choices**  
Are safer choices being made or supported?

## Safer choices are not always supported

30% of people do not believe improving roadsides is an effective solution.

### People's belief of the effectiveness of road safety solutions



▲ ▼ are shown when the result is significantly higher/lower from the Southern region's average. Numbers are rounded to the nearest whole number.

## REGIONAL INSIGHTS

The key differences in Otago towns (small and large) compared to the Southern region.

**Conversation:** People from Otago towns are more likely to discuss road risk in public. They are more likely to think current conversations focus on the right risks. They are less likely to think that community conversations improve safety.

**Confidence:** People from Otago towns identify similar road risks as the rest of the Southern region.

**Choices:** People from Otago towns have similar views of the effectiveness of safety solutions compared to the rest of New Zealand. They are more likely to think improving roadsides is an ineffective solution.

**Care:** People from Otago towns are more likely to think improving road safety is important. They rank it as the most important issue in their community and think road risk is increasing.

# Rural Otago quantitative research summary: Identifying community conditions that lead to safe choices



## RESEARCH METHOD

Survey of  
**131**  
rural Otago residents

### Rural Otago sample:

Rural Otago is a rural area or small community.

Collected as part of the national 2017 Better Conversations on Road Risk survey.

### National sample:

3,112 respondents  
Providing a +/-2% margin of error

Representative by region, age and gender

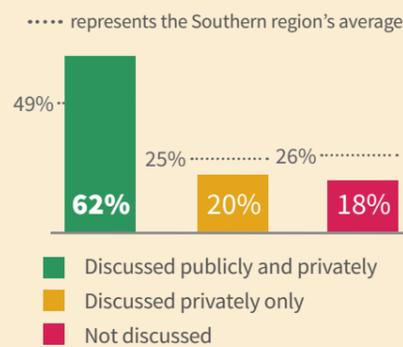
Collected online and by phone

Conducted April – May 2017

## Some conversations are taking place

Most people (82%) are talking about road risk/safety, with 62% doing so publicly. Over half (65%) agree conversations can improve safety.

### Where are people discussing road safety?



**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Do conversations improve safety?

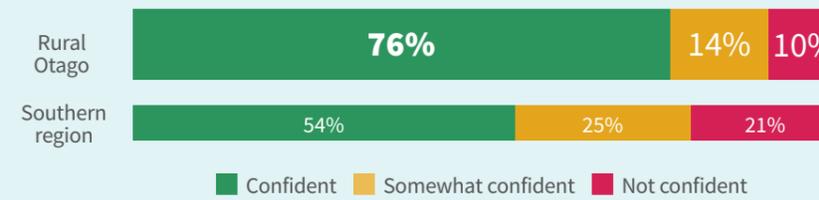
**65%**  
of rural Otago agree or strongly agree

62% Southern region

**Conversation**  
Are people talking about road risk?

## Confidence identifying road risk varies

76% can confidently identify a local road risk.



Legend: Confident (Green), Somewhat confident (Yellow), Not confident (Red)

**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Top three perceived road risks

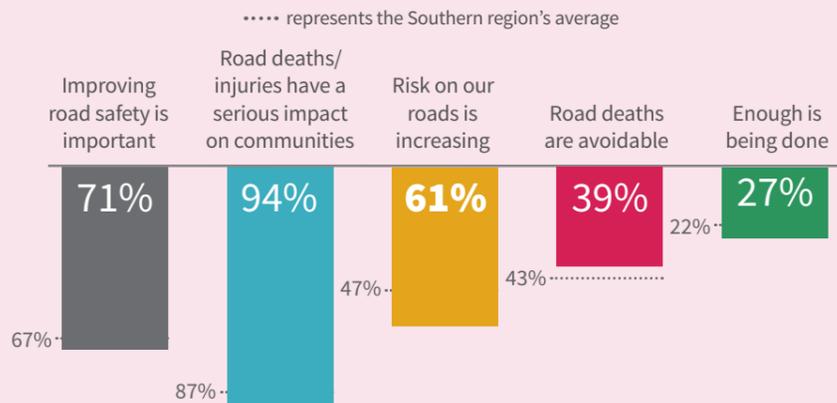
- 1) The road conditions, designs or quality (57%)
- 2) Travelling fast (57%)
- 3) Careless or reckless driving (57%)

**Confidence**  
How well are road risks and solutions understood?

## Communities care about road safety

Improving road safety ranks third relative to other community issues. 71% believe improving road safety is important.

### How many people agree or strongly agree with the following statements?



**Bold numbers** are shown when the result is significantly different from the Southern region's average.

### Care

Is road safety an important community issue?

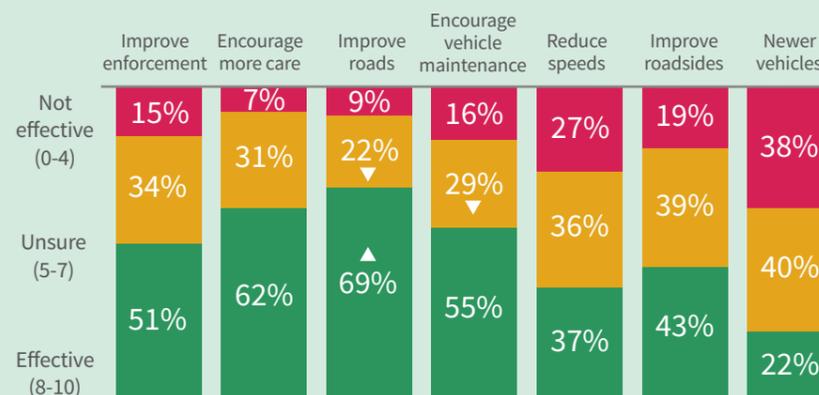
### Choices

Are safer choices being made or supported?

## Safer choices are not always supported

Only 22% of people believe encouraging drivers to choose newer or safer vehicles is an effective solution.

### People's belief of the effectiveness of road safety solutions



▲ ▼ are shown when the result is significantly higher/lower from the Southern region's average. Numbers are rounded to the nearest whole number.

## REGIONAL INSIGHTS

The key differences in Rural Otago compared to the Southern region.

**Conversation:** People from rural Otago are more likely to discuss road risk in public and are more likely to think current conversations focus on the right risks. They are more likely to show their support publicly for improving road safety (56% vs 45% for Southern region).

**Confidence:** People from rural Otago are much more confident in the risks they identify. They are more likely to think roads contribute to crashes, and less likely to think careless driving and speeding do.

**Choices:** People from rural Otago have similar views of the effectiveness of safety solution compared to the rest of New Zealand. They are more likely to think improving roads is an effective solution.

**Care:** People from rural Otago place a similar level of importance on road safety to the rest of the Southern region, although rank it higher in importance relative to other community issues. They are more likely to think that road risk is increasing, that roads are unsafe for overseas visitors (44% vs 33% for Southern region) and that safe speeds are hard to determine (49% vs 39% for Southern region).

# Otago segmentation: Segments for the region compared to the national segments



People from Otago are more likely to be in the *NIMBY* and *Pro safety* segments. They are less likely to be the *Life in the fast lane* and *Privately pro safety* segments.

