

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.

SOUTHLAND PACK

This pack includes:

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

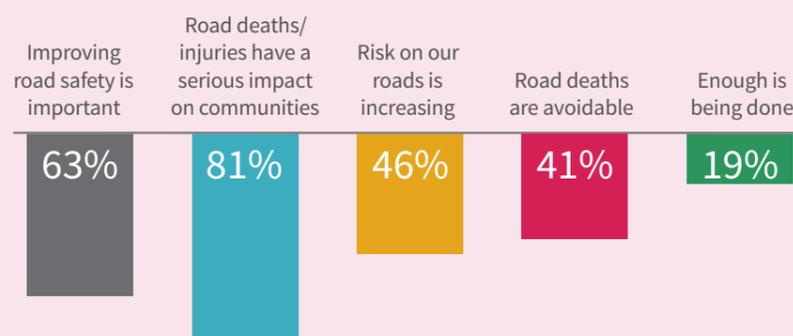
Safer choices are not always supported

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

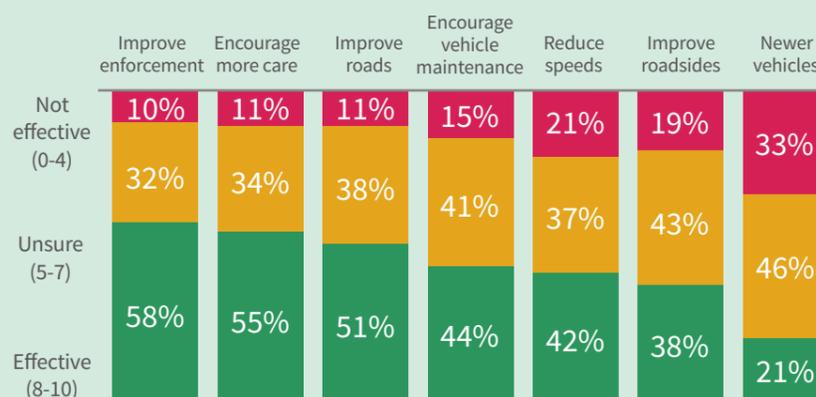
Communities care about road safety

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?

Choices

Are safer choices being made or supported?

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"

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.

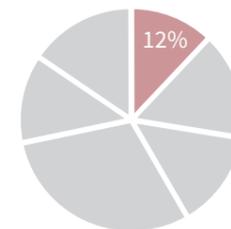
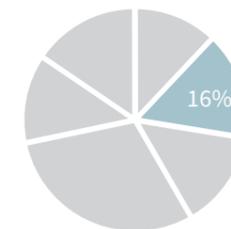
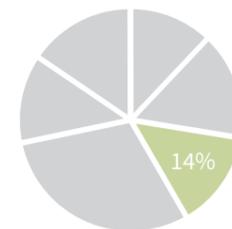
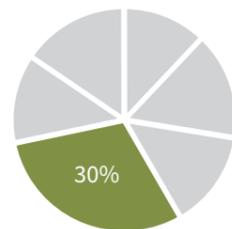
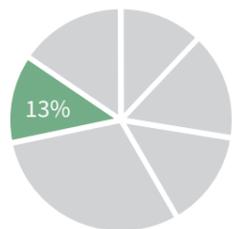
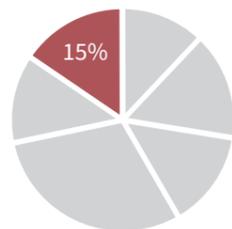
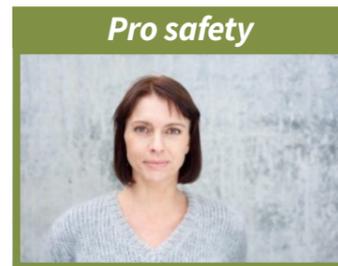
RESEARCH METHOD

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



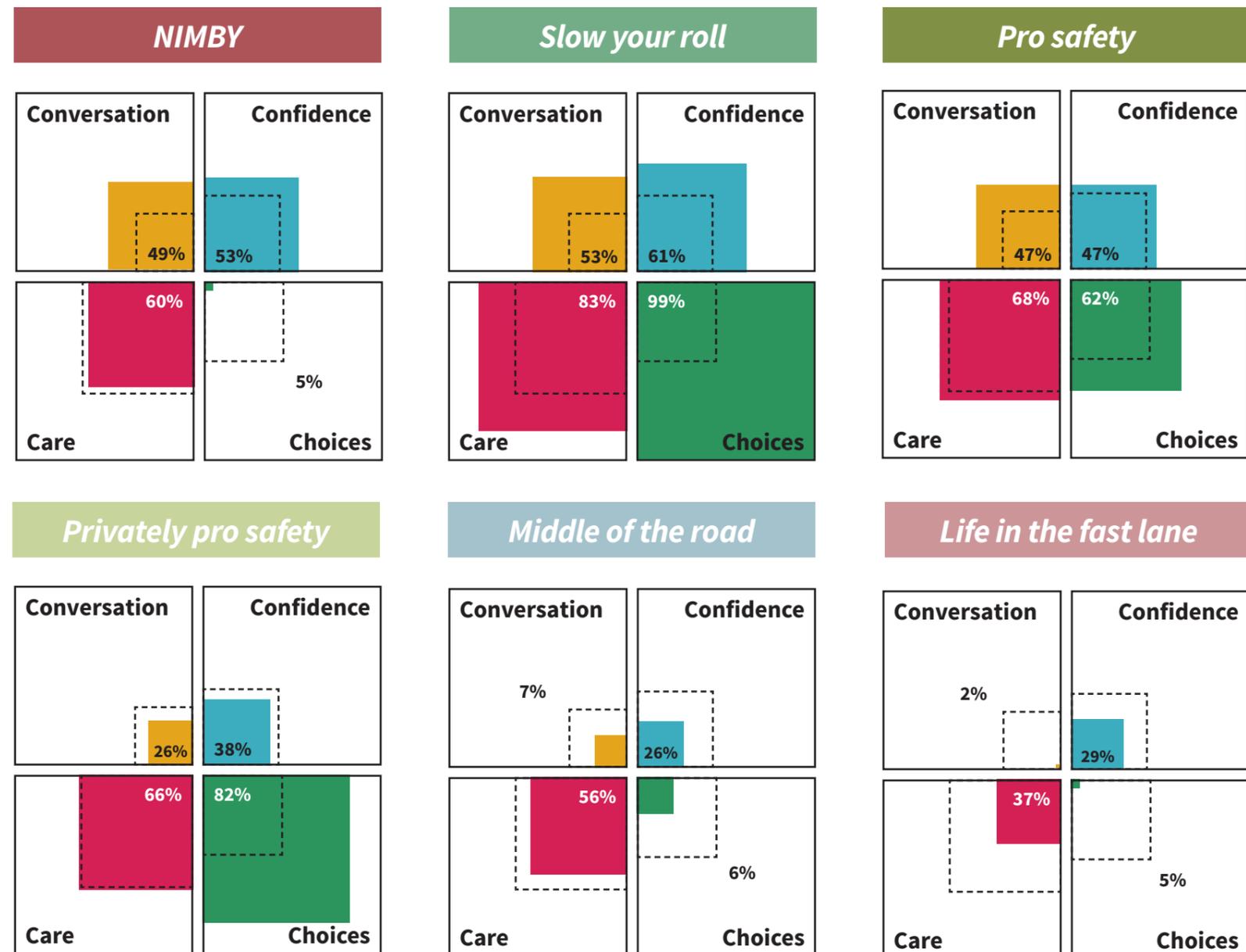
This page highlights some important differences between segments based on the following four key measures.

- 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.



Southland research summaries



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



RESEARCH METHOD

Survey of **362** Southland residents

This sample provides a +/-5% margin of error

Southland 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

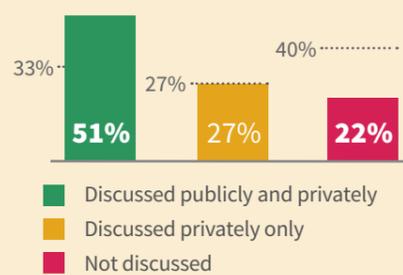
Conducted April – May 2017

Some conversations are taking place

Most people (78%) are talking about road risk/safety, with 51% doing so publicly. Most (65%) 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?

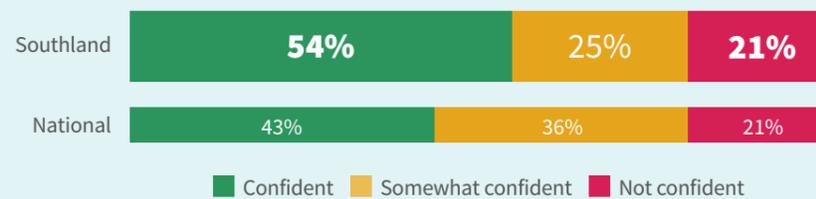
65%

of Southland 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

- Careless or reckless driving (63%)
- Drivers making mistakes (59%)
- Travelling fast (56%)

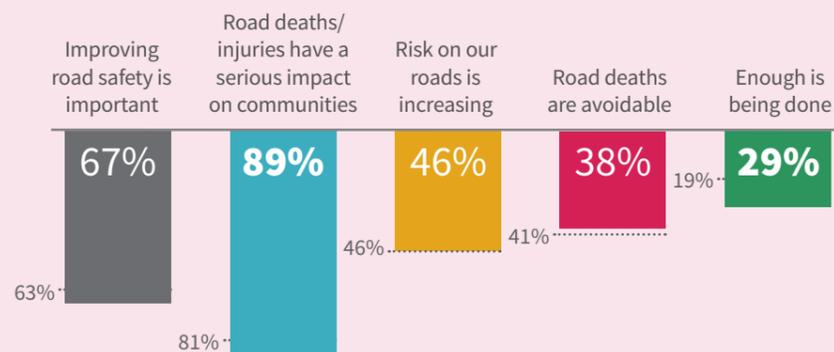
Confidence
How well are road risks and solutions understood?

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.

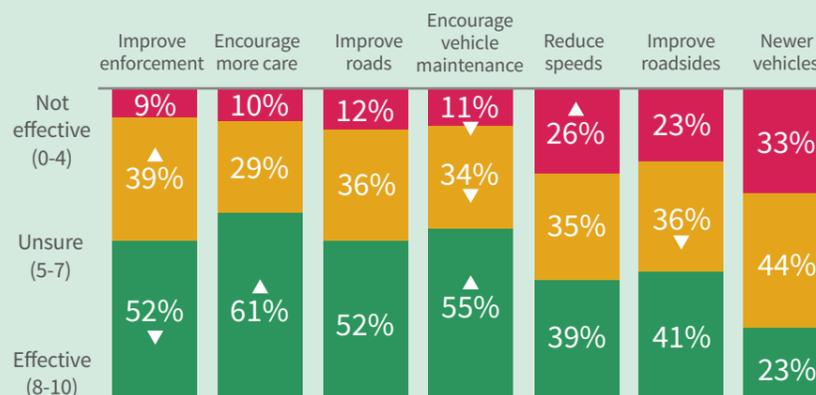
Care
Is road safety an important community issue?

Choices
Are safer choices being made or supported?

Safer choices are not always supported

26% of people do not believe speed limit reductions are 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 Southland compared to the national findings.

Conversation: Southlanders are more likely to discuss road risk, yet are less likely to publicly express support for improving safety (40% vs 48% for the national average). Southlanders are more likely to feel community conversations improve safety and that their current conversations focus on the right risks (52% vs 42% for the national average).

Confidence: Southlanders feel more confident in identifying road risks. While the risks they identify are similar to the rest of New Zealand, they are less likely to state careless driving and speed, and are more likely to state road conditions.

Choices: Southlanders are less likely to support speed limit reduction or enforcement, but are more likely to support drivers taking more care and maintaining their vehicles.

Care: Southlanders are more likely to acknowledge the impact of road trauma on communities, but are also more likely to believe enough is being done to reduce risk. They are more likely to think roads are safe for local drivers (58% vs 43% for the national average), but many agree some roads are not safe at current limits (43% vs 37% for the 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

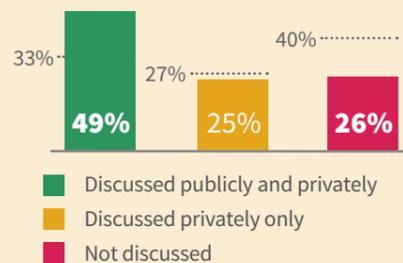
Conducted April – May 2017

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?

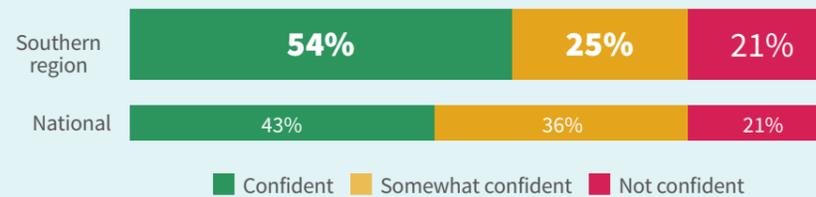
62%

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%)

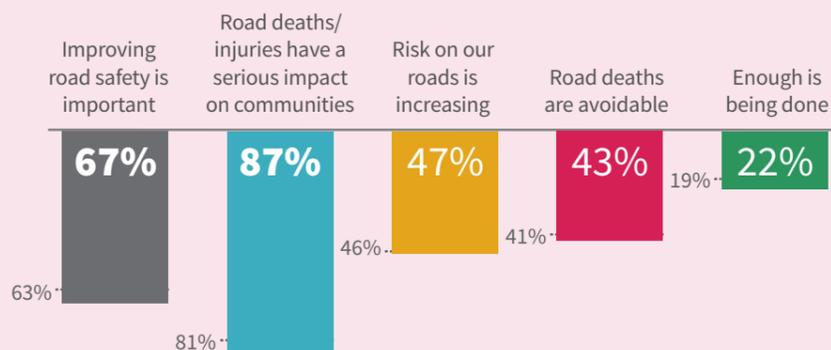
Confidence
How well are road risks and solutions understood?

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.

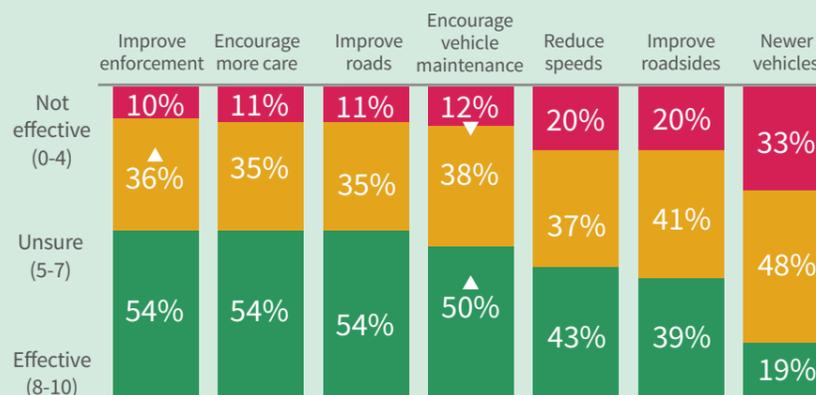
Care
Is road safety an important community issue?

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.

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



RESEARCH METHOD

Survey of **150** Invercargill residents

Invercargill 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

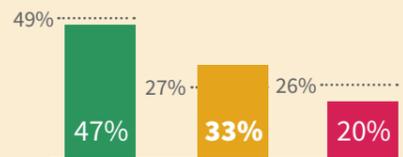
Conducted April – May 2017

Some conversations are taking place

Most people (80%) are talking about road risk/safety, with 47% doing so publicly. Most (67%) 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?

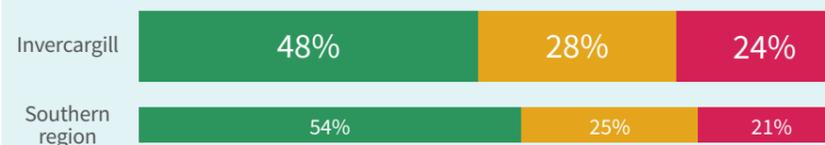
67%

of Invercargill agree or strongly agree
62% Southern region

Conversation
Are people talking about road risk?

Confidence identifying road risk varies

48% of people can confidently identify a local road risk.



- Confident
- Somewhat confident
- Not confident

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

Top three perceived road risks

- Careless or reckless driving (63%)
- Travelling fast (56%)
- Drivers making mistakes (55%)

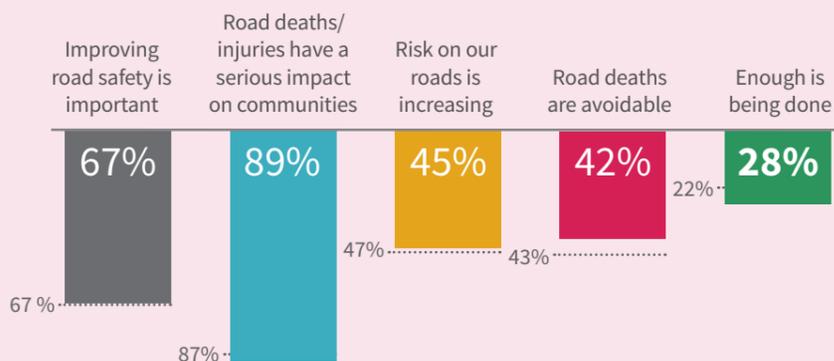
Confidence
How well are road risks and solutions understood?

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 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?

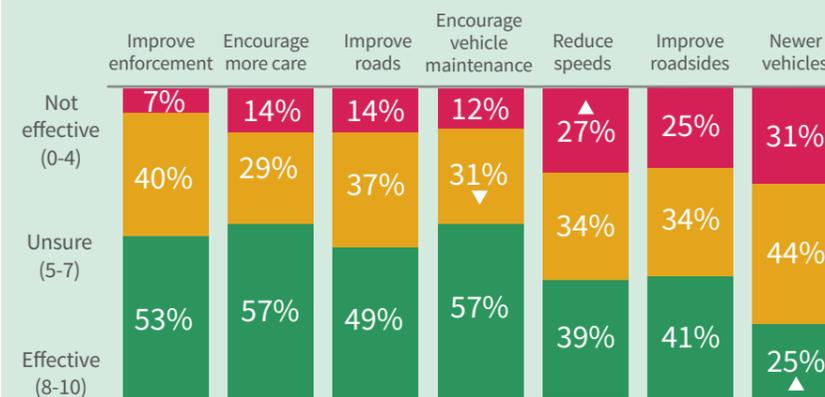
Choices

Are safer choices being made or supported?

Safer choices are not always supported

27% of people do not believe speed limit reductions are 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 Invercargill compared to the Southern region.

Conversation: People from Invercargill are more likely to discuss road risk in private. They are less likely to show their support publicly for improving road safety (36% vs 28% for Southern region).

Confidence: People from Invercargill identify similar road risks to the rest of the Southern region.

Choices: People from Invercargill are mostly in line with the rest of the Southern region in their view of the effectiveness of safety solutions. They are more likely to think encouraging new vehicles is an effective solution and that reducing travel speeds is an effective solution. They are more likely to oppose speed limit reduction (47% vs 32% for Southern region).

Care: People from Invercargill place a similar level of importance on road safety as the rest of the Southern region. They are more likely to think enough is being done and that roads are safe for both themselves (69% vs 56% for Southern region) and overseas visitors (26% vs 18% for Southern region).

Southland towns (small and large) quantitative research summary: Identifying community conditions that lead to safe choices



RESEARCH METHOD

Survey of
91
Southland town residents

Southland towns sample:

Southland 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

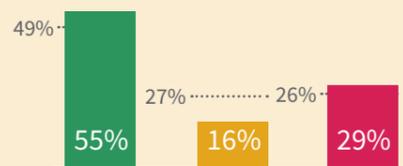
Conducted April – May 2017

Some conversations are taking place

Most people (71%) are talking about road risk/safety, with 55% doing so publicly. Over half (56%) 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?

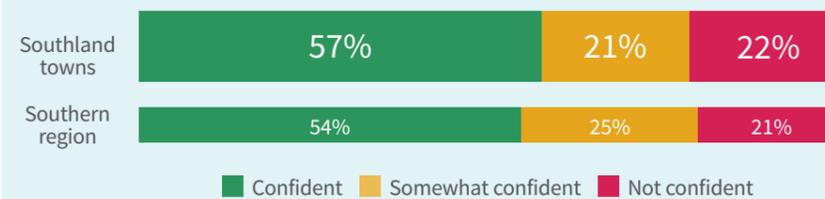
56%

of Southland towns agree or strongly agree
62% Southern region

Conversation
Are people talking about road risk?

Confidence identifying road risk varies

57% of people 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

- Careless or reckless driving (61%)
- Drivers making mistakes (58%)
- Travelling fast (48%)

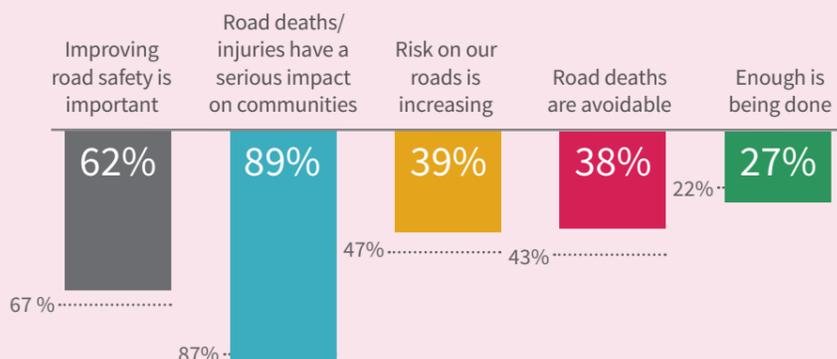
Confidence
How well are road risks and solutions understood?

Communities care about road safety

Improving road safety ranks sixth relative to other community issues. 62% believe improving road safety is important.

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

..... represents the Southland average



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

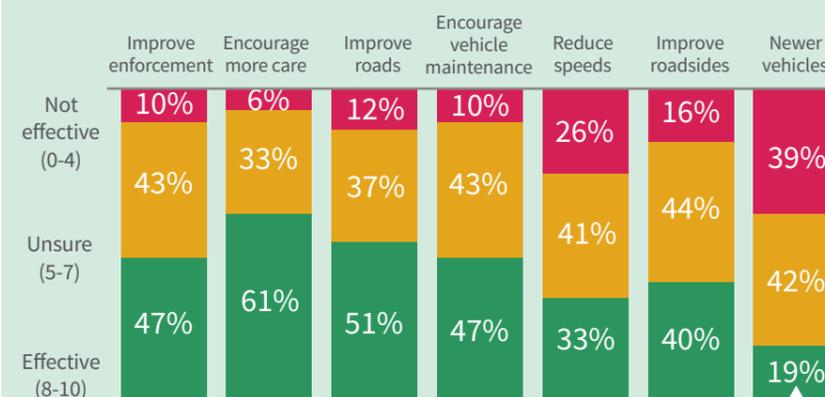
Care
Is road safety an important community issue?

Choices
Are safer choices being made or supported?

Safer choices are not always supported

26% of people do not believe speed limit reductions are 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 Southland towns (small and large) compared to the Southern region.

Conversation: People from Southland towns are in line with the rest of the Southern region when it comes to conversations about road risk. They are more likely to not show their support publicly for improving road safety (41% vs 28% for Southern region).

Confidence: People from Southland towns identify similar road risks to the rest of the Southern region, although they are less likely to think speed contributes to crashes.

Choices: People from Southland towns are in line with the rest of the Southern region in their view of the effectiveness of safety solutions.

Care: People from Southland towns place a similar level of importance on road safety as the rest of the Southern region.

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



RESEARCH METHOD

Survey of **121** rural Southland residents

Rural Southland sample:

Rural Southland 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

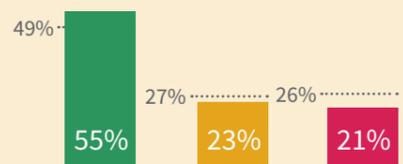
Conducted April – May 2017

Some conversations are taking place

Most people (78%) are talking about road risk/safety, with 55% doing so publicly. Most (67%) 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?

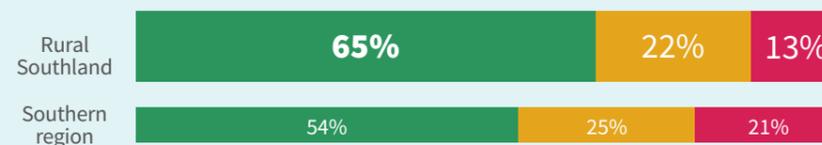
67%

of rural Southland agree or strongly agree
62% Southern region

Conversation
Are people talking about road risk?

Confidence identifying road risk varies

65% of people 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) Drivers making mistakes (70%)
- 2) The road conditions, design or quality (67%)
- 3) Careless or reckless driving (64%)

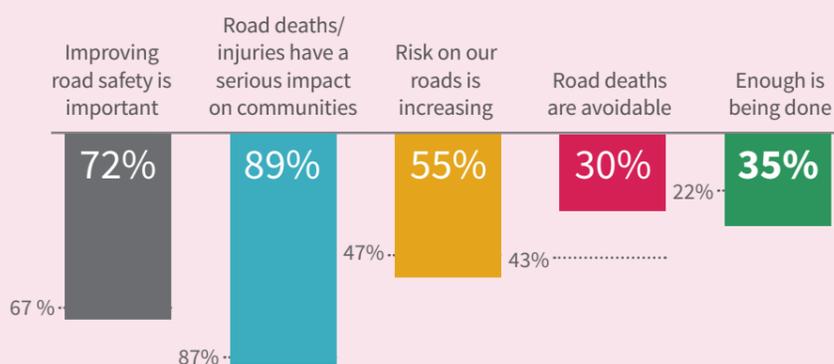
Confidence
How well are road risks and solutions understood?

Communities care about road safety

Improving road safety ranks first relative to other community issues. 72% believe improving road safety is important.

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

..... represents the Southland 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?

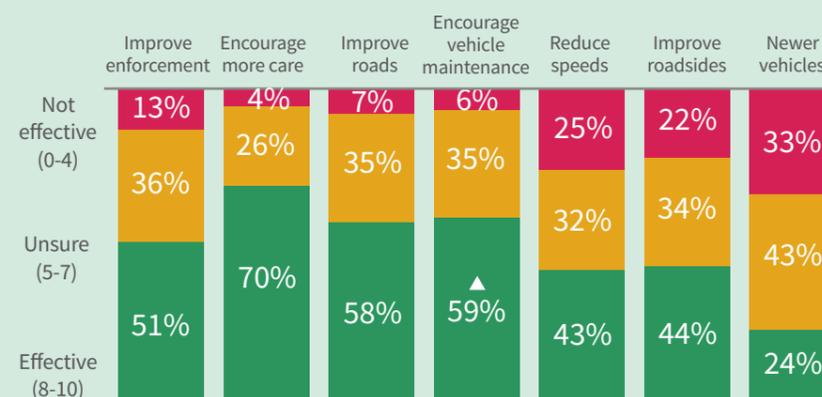
Choices

Are safer choices being made or supported?

Safer choices are not always supported

59% 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 Southern region's average. Numbers are rounded to the nearest whole number.

REGIONAL INSIGHTS

The key differences in rural Southland compared to the Southern region.

Conversation: People from rural Southland are in line with the rest of the Southern region when it comes to conversations about road risk, but are more likely to think current conversations focus on the right risks.

Confidence: People from rural Southland are more confident in identifying risks. They identify similar road risks as the rest of the Southern region. However, they are more likely to think roads and roadsides (38% vs 22% for Southern region) contribute to crashes.

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

Care: In rural Southland road safety ranks as the most important community issue. They are more likely to think enough is being done to reduce road risk. They are also more likely to think roads are unsafe for overseas visitors (44% vs 33% for Southern region).

Southland Segmentation: Segments for the region compared to the national segments



People of Southland are more likely to be in the *NIMBY* segment and less likely to be in the *Middle of the road* segment.

