



BUZZED DRIVING PREVENTION Tracking Survey Report

MARCH 2018

Findings for Internal Use Only



Tracking Survey Key Performance Indicators (KPIs)



Campaign
recognition



Likelihood to
drive while
buzzed



Choose alternative
transport OR never
drink if planning to
drive



Recently drove
impaired



KPI Results Summary: Core Target of Men 21-35



Recognition of “Buzzed Driving is Drunk Driving” advertising is high among men 21-35, driven by strong television and OOH recognition.



3 in 10 (28%) men 21-35 said they would be extremely or very likely to drive home if feeling buzzed or somewhat impaired, decreasing from last year’s record high but still significantly higher than the 2005 benchmark (21%).



63% of men 21-35 said they would *always* get a ride/taxi/public transport or never drink if planning to drive, significantly higher than last year and the 2005 benchmark.



41% of men 21-35 agree that there was a time *recently* when they probably had too much to drink before driving; this level increased in 2016 & 2017 and is stable in 2018.

Tracking Survey: Research Objectives

This tracking survey is designed to measure:

- Awareness of the issue and campaign advertising
- Self-reported attitudes and behaviors related to buzzed driving

Because the survey's attitudes and behaviors are self-reported, these findings should be interpreted with care.

The trends reported in this survey correlate with the Ad Council campaign's activities, but the findings do not isolate the response to this campaign apart from other national and local initiatives, including law enforcement initiatives and other drunk driving communications programs.

This report primarily focuses on the core campaign audience of males 21-35, but findings for General Market adults 21+ are also reported. Findings cannot be generalized to the national population.

DONATED MEDIA



Project Roadblock Snapshot

December 26 – 31, 2017

\$8.4 donated media

Compared to \$9.4 million in 2016

66.4K detections

68.9k in 2016

209 DMAs

Reaching all but one market



**LOCAL TV PUTS THE BRAKES
ON DRUNK DRIVING.**

Donated Media Highlights

January – December 2017

\$50M donated media

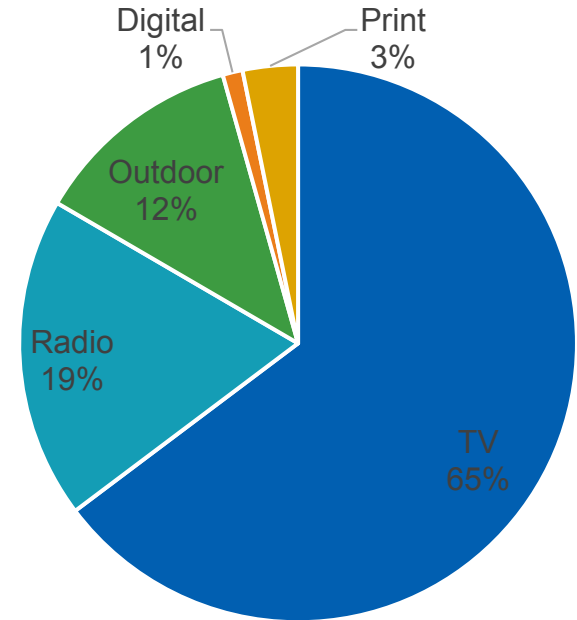
Down from \$78M in 2016

1.3M detections

Down from 1.7M in 2016

Strong support in TV

Propelled by successful Project Roadblock

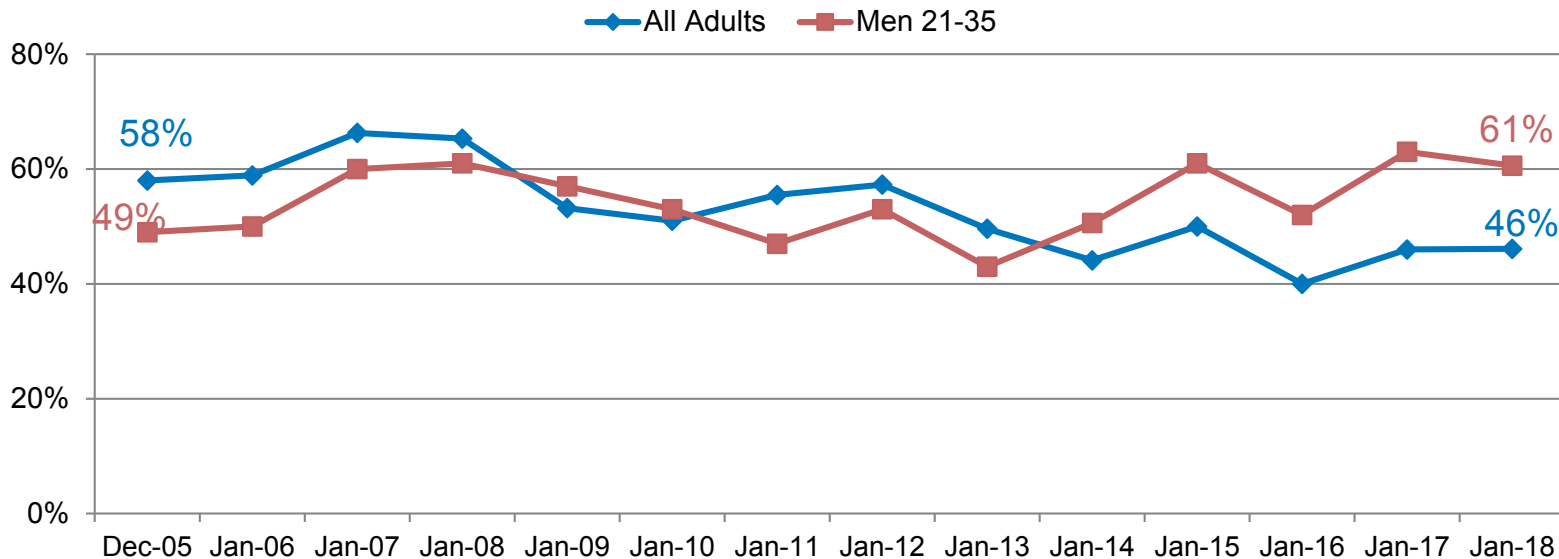


AWARENESS



General awareness of any messages about drunk driving prevention is **61% for men 21-35**, in-line with the prior year. Awareness has grown for the male segment while decreasing for adults 21+ over time.

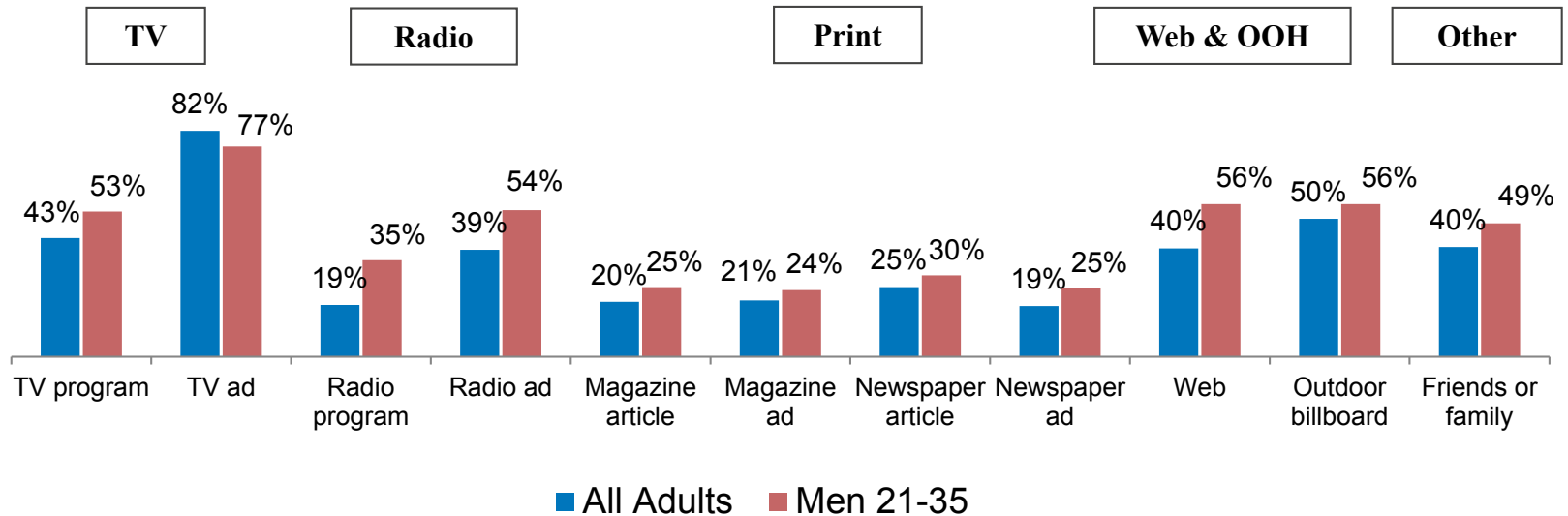
% Who Say They Have Recently Seen/Heard Any Drunk Driving Prevention Messages





Key drivers of communications include television ads, outdoor billboards, web, radio ads, and friends & family.

Compared to 2017, sources of awareness remained stable with the exception of magazine ads, which decreased for the male 21-35 sample.





Campaign recognition is very strong across all media types, particularly TV and digital. The core target of **men 21-35** have significantly higher recognition than **adults 18+** across all media types.

Any PSA (net)

58% | **78%**

TV PSA (net)

38% | **52%**

Digital PSA (net)

35% | **58%**

Radio PSA (net)

29% | **50%**

OOH PSA (net)

20% | **37%**



Seven in ten men 21-35 report awareness of ads with the Buzzed Driving tagline, matching the recognition level for **adults 21+**.

TV and OOH ad recognition decreased for both audiences; this is partially explained by removing the dated “Neon Signs” and “Breathalyzer” assets in the survey to accommodate the newer “Probably Okay” assets. Recognition of TV remains very high, however, due to substantial exposure through the TVB Roadblock in late December.

	<u>All Adults</u>				<u>Men 21-35</u>			
% responding	2015	2016	2017	2018	2015	2016	2017	2018
Awareness of any ads w/tagline: “Buzzed Driving Is Drunk Driving”*	54	57	64	69	63	66	73	70
Net TV PSA	39	40	49	38	50	50	66	52
Net Radio PSA	21	19	27	29	37	34	48	50
Net OOH PSA	16	18	30^	20	31	32	49^	37
Net Banner PSA	20	20	31	35	39	39	53	58

See appendix for recognition by individual executions.
^2017 OOH net score includes print ad.

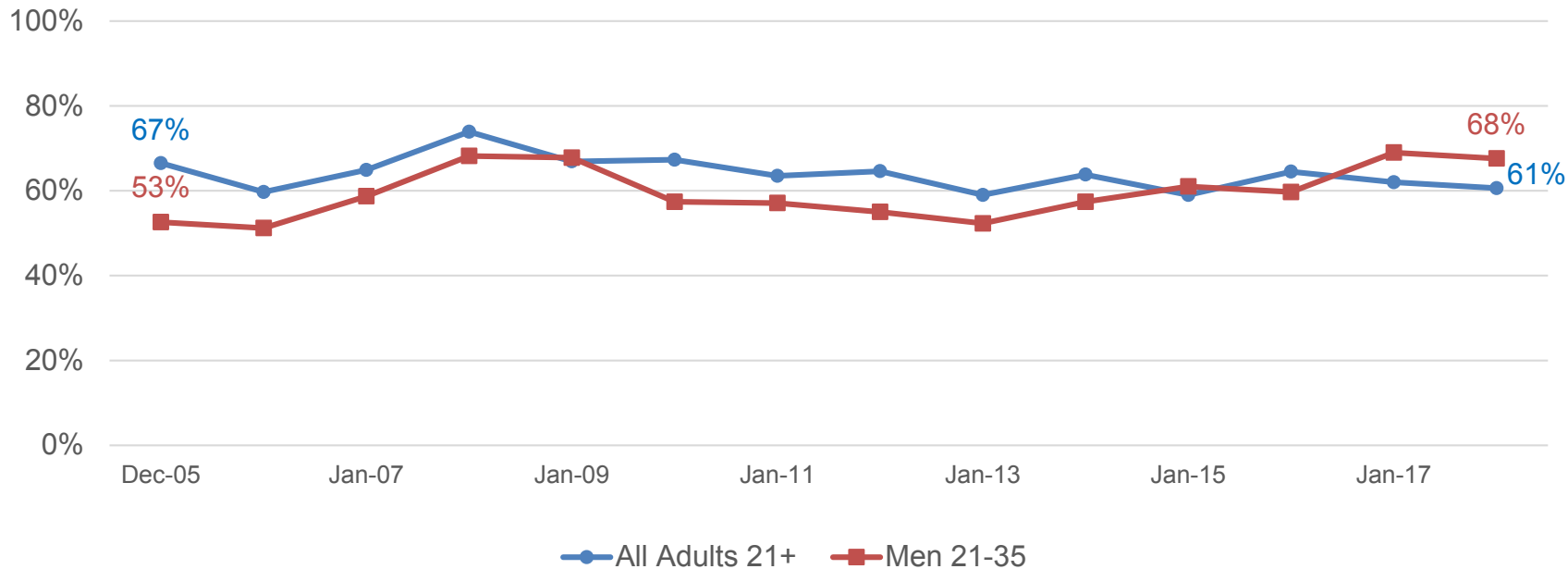
ATTITUDES



Among **men age 21-35**, concern levels about drunk driving were in-line with 2017 (68%) but higher than 2010-2016.

Concern levels among the general public have fluctuated slightly over time; in 2018, **61% of adults 21+** were extremely/very concerned, stable from the prior year.

% Extremely/ Very Concerned about Drunk Driving Prevention



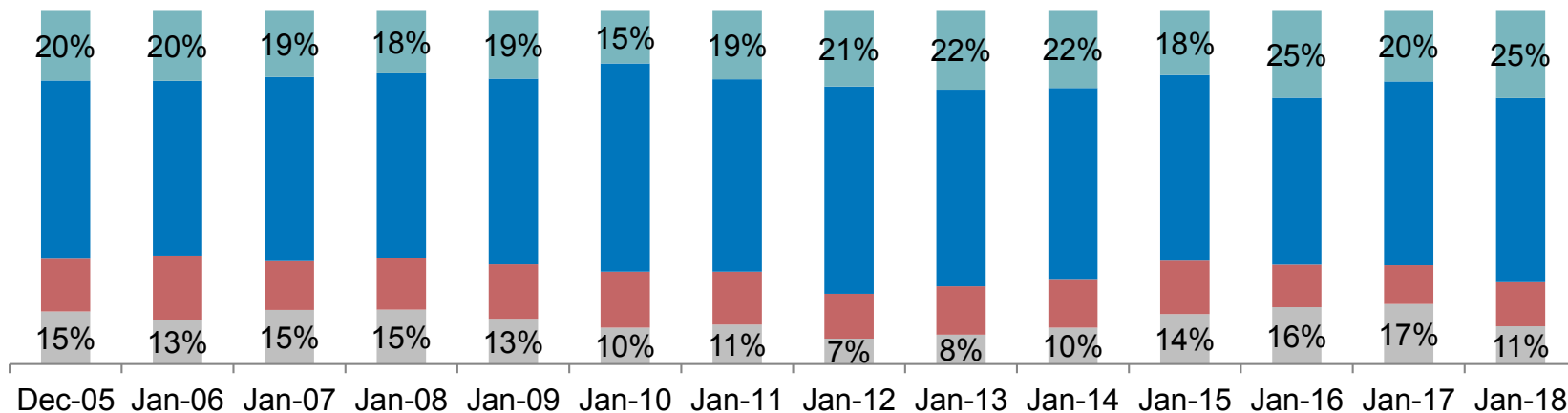


Among **adults 21+**, **one-quarter (25%)** said they would not drink if they knew they needed to drive afterwards.

The percentage who said they would be **extremely/very likely to drive while buzzed (11%)** is significantly lower than the benchmark and the two prior years.

All Adults Age 21+

■ Extremely/Very ■ Somewhat ■ Not too/Not at all ■ NA - I never drink if I have to drive after

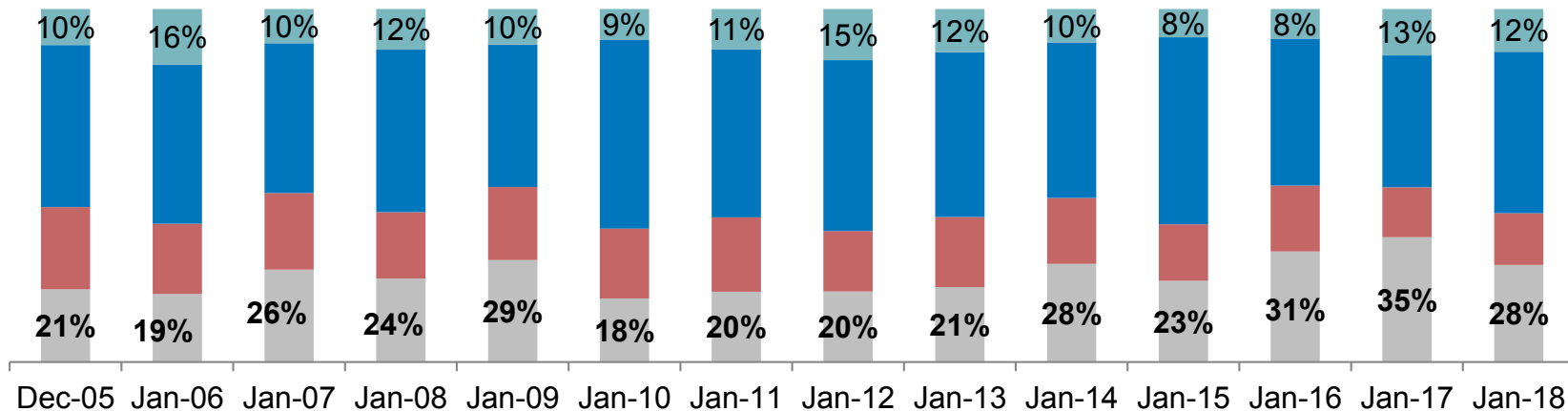




Among **men 21-35**, less than 3 in 10 (28%) said they would be extremely or very likely to drive home if feeling buzzed or somewhat impaired, lower than in 2017 (35%) but not the 2005 benchmark (21%). **12% reported never drinking** if needing to drive, on par with last year.

Men 21-35

■ Extremely/Very ■ Somewhat ■ Not too/Not at all ■ NA - I never drink if I have to drive after

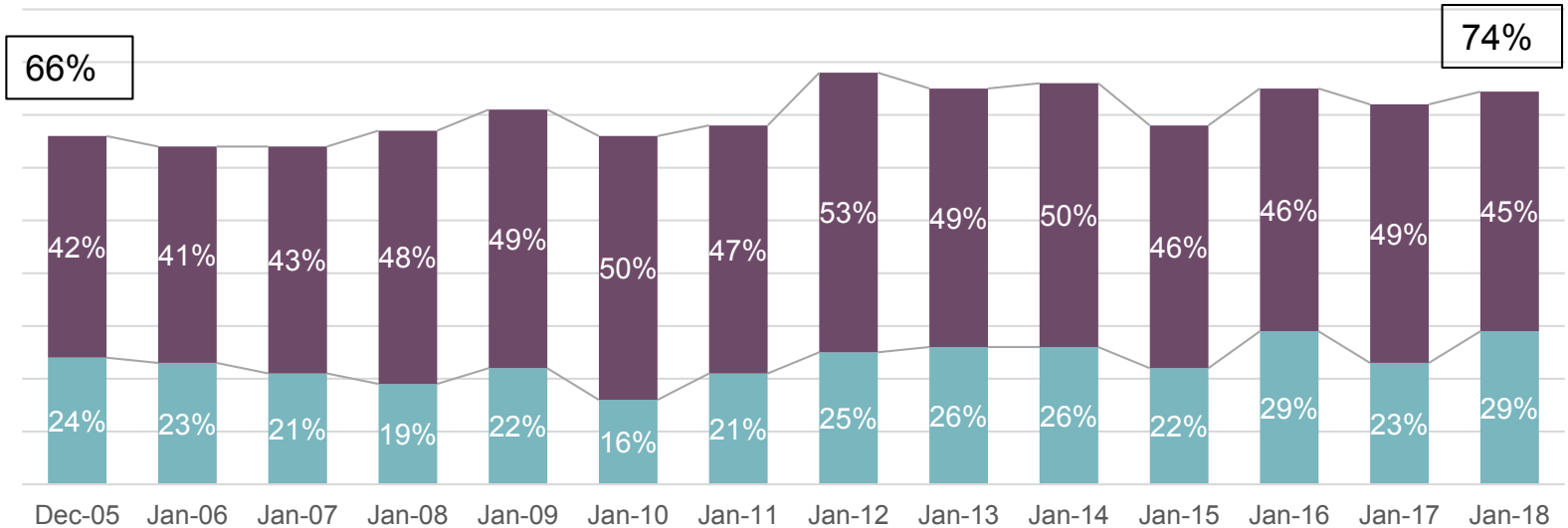




Among adults age 21+, 74% said they would **always get a ride/taxi/public transport** or **never drink if planning to drive**, on par with the last year. More respondents said they would never drink if planning to drive compared to last year.

All Adults Age 21+

- I'll always get a ride from a friend, get a taxi, or use public transportation
- NA - I never drink if I need to drive after

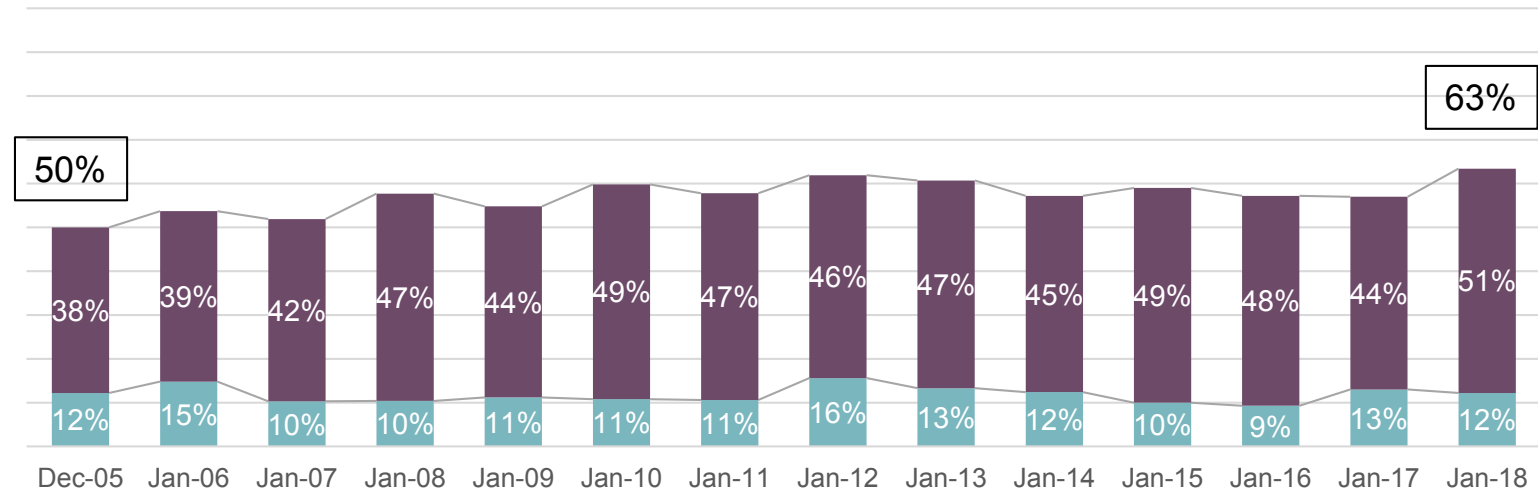




Among men 21-35, 63% said they would **always get a ride/taxi/public transport** or **never drink if planning to drive**; this is significantly higher than in 2017 (57%). The **51% who report they would seek alternative transport** is the highest number since the survey began.

Men 21-35

- I'll always get a ride from a friend, get a taxi, or use public transportation
- NA - I never drink if I need to drive after



*Statistical significance 90% confidence level

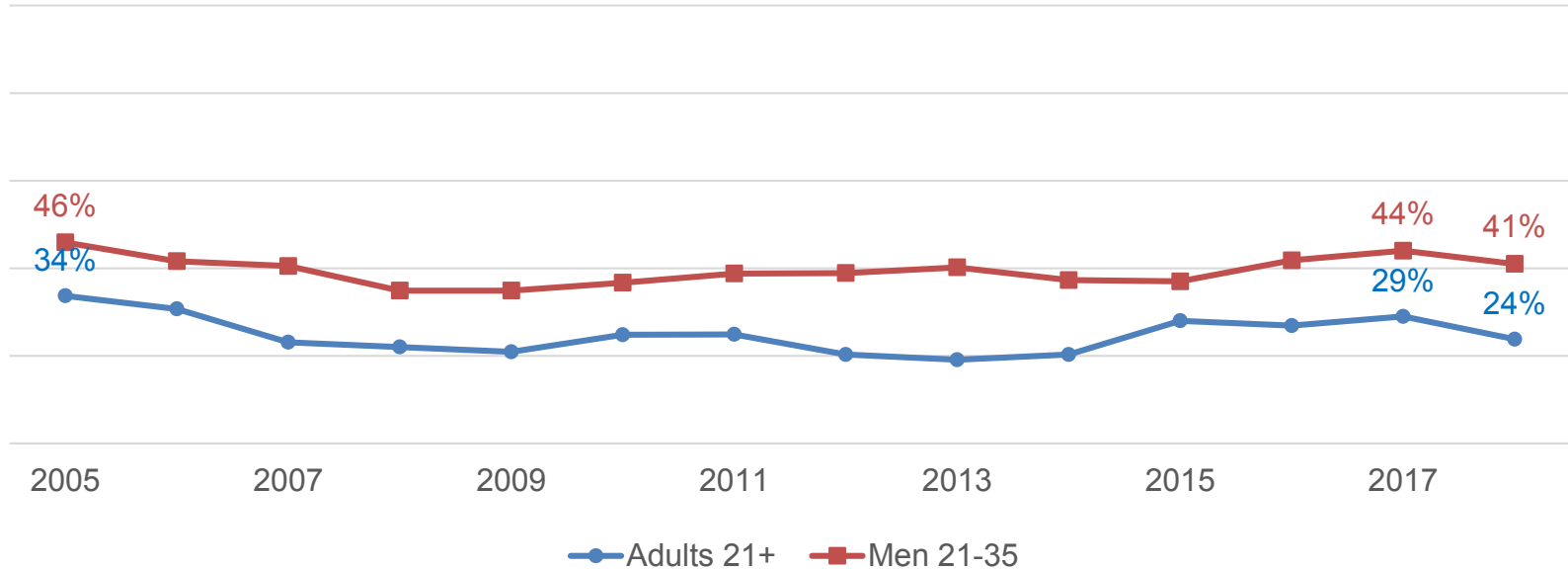
BEHAVIORS



About **4 in 10 men 21-35 (41%)** agree that “there was a time recently when I probably had too much to drink before getting behind the wheel.” This percentage is stable from 2017.

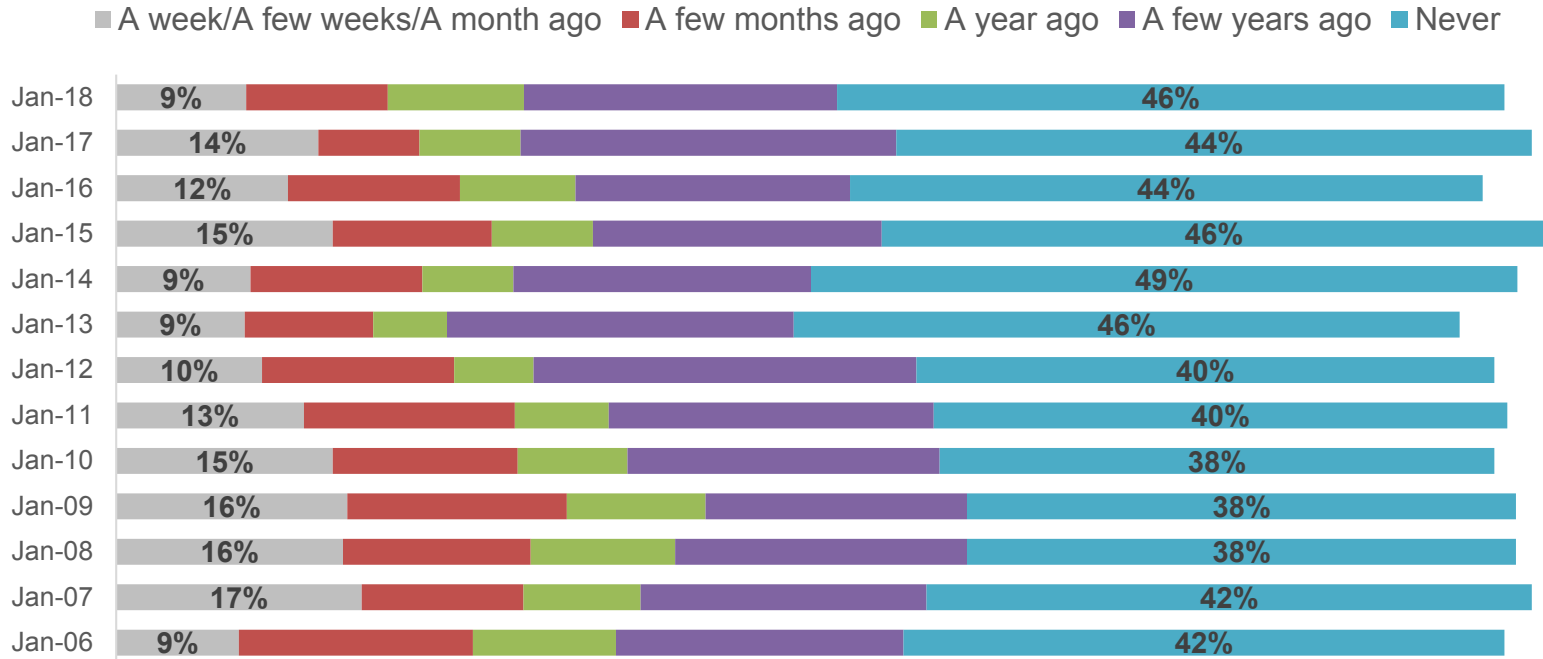
About **one-quarter of adults 21+** agree they have done this, lower than 2017 and the benchmark level.

% “Strongly/Somewhat Agree”



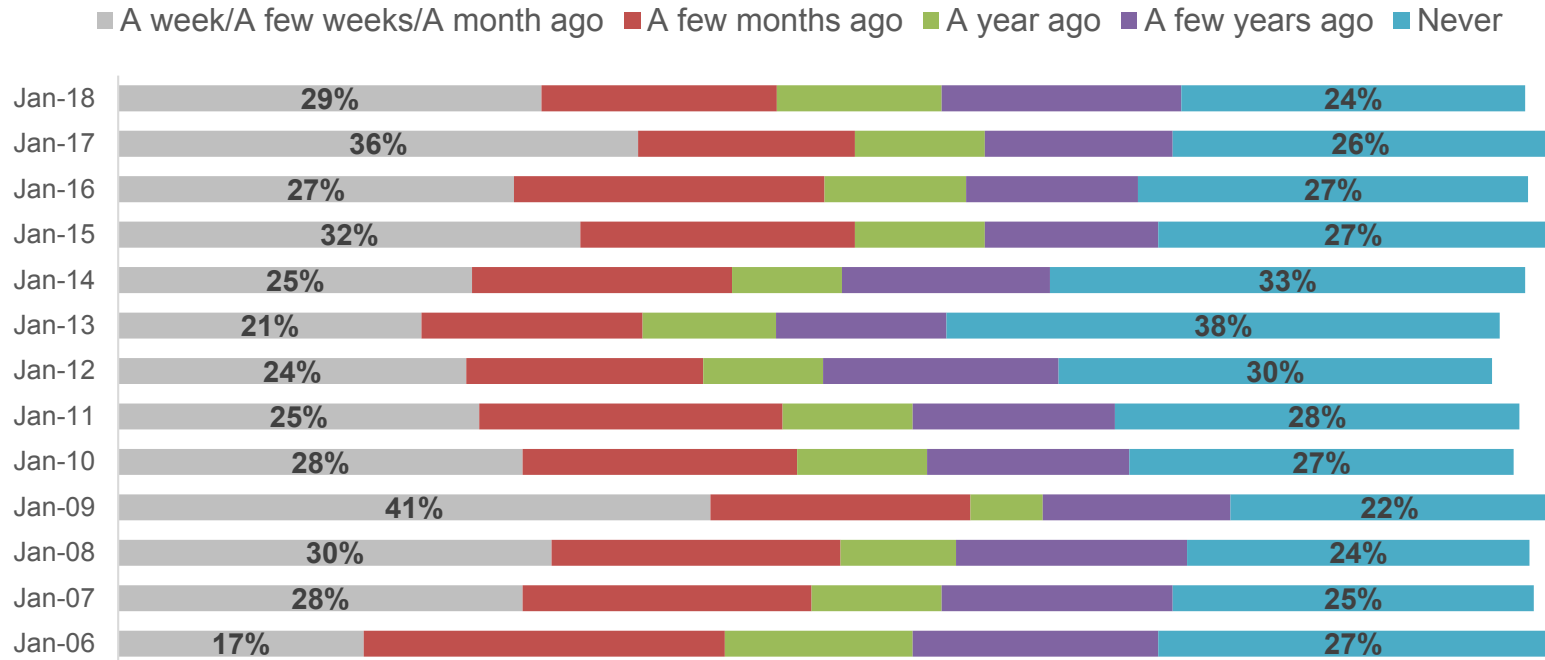


In January 2018, **9% of all respondents age 21+** reported that they had refrained from driving after drinking despite originally planning to drive within the past month. Similar to the 2017 finding, **more than 4 in 10 (46%)** respondents said they had never been in this situation.



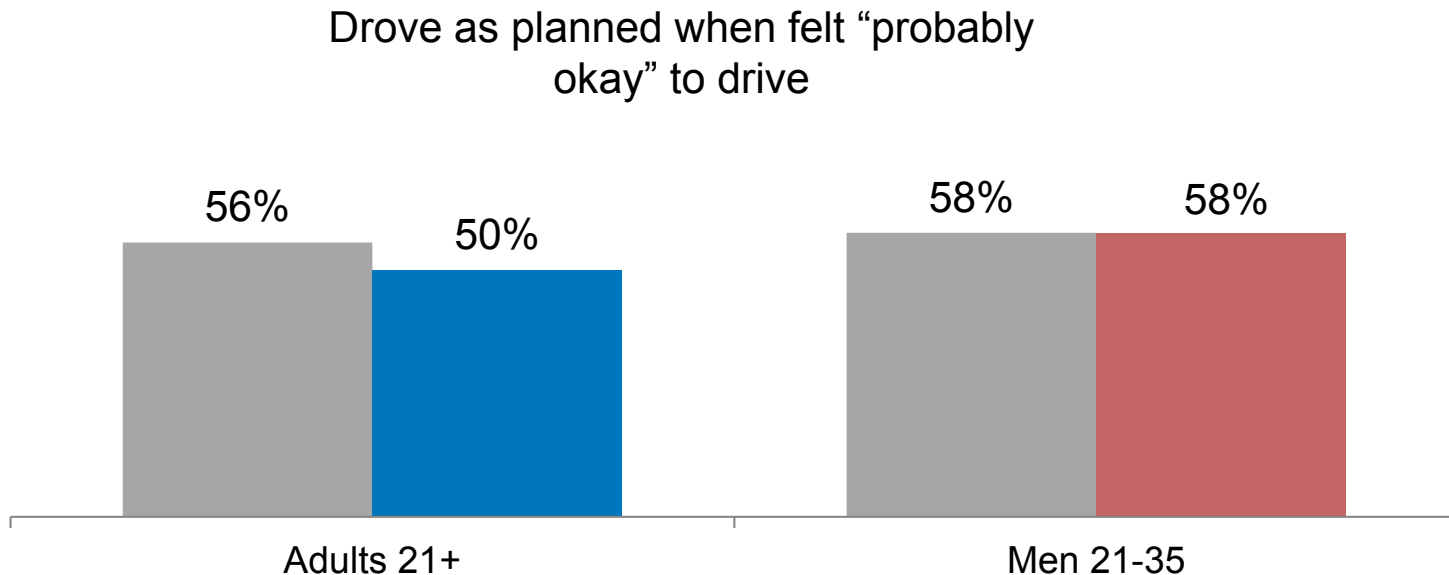


In January 2018, **29%** of male respondents age 21-35 reported that the last time they had refrained from driving after drinking despite originally planning to drive was within the past month.





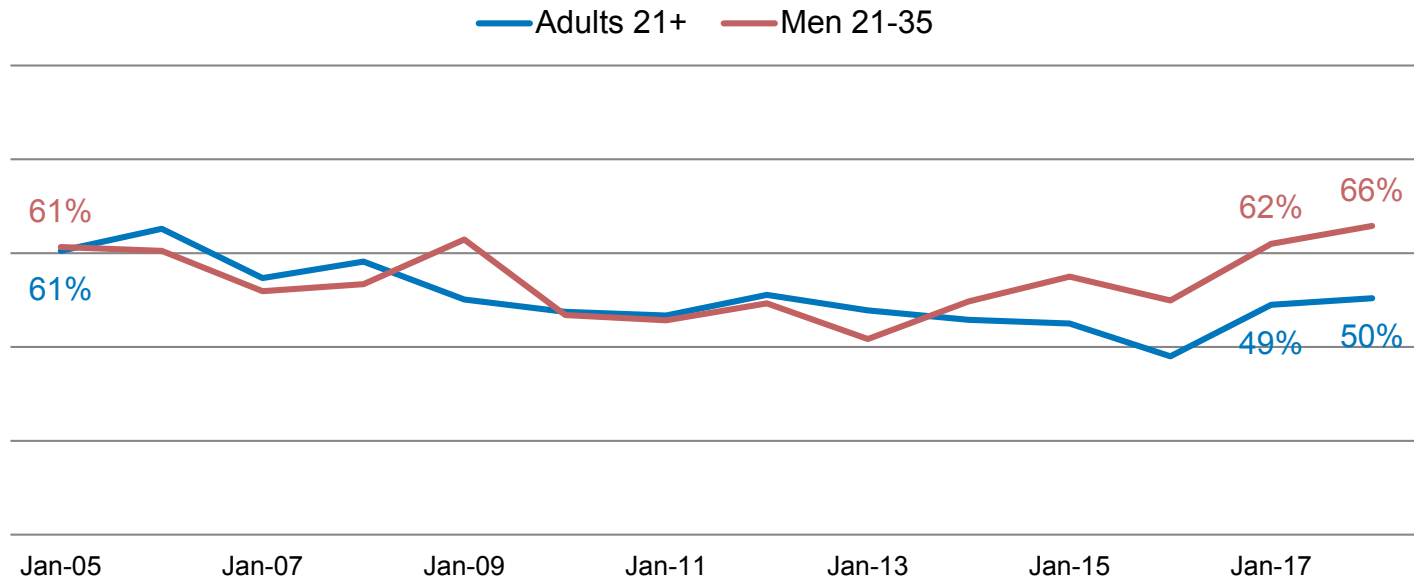
In January 2018, among those who had been in a situation in the past year where they felt they were probably okay to safely drive but not sure, **50% of all respondents age 21+** and **58% of male respondents age 21-35** reported that the last time this happened they chose to drive.



Base : Those who had been in situation in past 12 months



In 2018, **two-thirds (66%) of men 21-35** said they have recently had a discussion with friends or family, similar to 2017. Discussions about the risks of drinking and driving among adults 21+ have decreased over time but are steady from 2017.



Summary

In summary...

Overall recognition of the campaign is very strong and remains a top performer among Ad Council PSA campaigns; Men 21-35, the core media target are significantly more likely than General Market to see the campaign in all mediums

Early progress made in regards to choosing alternative transportation options has been maintained year-to-year, and increased significantly this year for men 21-35.

The level of young men 21-35 and adults 21+ who say they would be likely to drive after drinking has decreased from the high recorded in 2017. In 2018, multiple measures moved in a positive direction from the prior year.

We haven't yet seen movement on men saying they refrained from driving when feeling "probably okay" to drive, but this campaign has only been in-market for one year.

Appendix

Survey Methodology

What?	“Buzzed Driving Is Drunk Driving” Campaign Tracking Survey													
When?	Benchmark: December 15-21, 2005 Wave 2: January 8-16, 2006 Wave 3: January 5-13, 2007 Wave 4: January 4-16, 2008 Wave 5: January 7-15, 2009 Wave 6: January 5-15, 2010 Wave 8: January 6-18, 2012							Wave 9: January 9-18, 2013 Wave 10: January 14-23, 2014 Wave 11: January 2-18, 2015 Wave 12: January 6-February 1, 2016 Wave 13: January 13 – March 1, 2017 Wave 14: January 8 – 24, 2018						
Who?	Respondents age 21+ All must drive frequently All must drink alcohol at least occasionally													
	Wave 1 521 Adults 21+	Wave 2 506 Adults 21+	Wave 3 516 Adults 21+	Wave 4 515 Adults 21+	Wave 5 512 Adults 21+	Wave 6 731 Adults 21+	Wave 7 713 Adults 21+	Wave 8 800 Adults 21+	Wave 9 512 Adults 21+	Wave 10 503 Adults 21+	Wave 11 520 Adults 21+	Wave 12 504 Adults 21+	Wave 13 702 Adults 21+	Wave 14 775 Adults 21+
	344 Men 21-35	332 Men 21-35	351 Men 21-35	393 Men 21-35	367 Men 21-35	455 Men 21-35	508 Men 21-35	614 Men 21-35	595 Men 21-35	587 Men 21-35	632 Men 21-35	593 Men 21-35	628 Men 21-35	638 Men 21-35
						400 Women 21-40	777 Women 21-40							
	The findings reported for men 21-35 include men from the GM sample of adults plus an augment sample of this population.													
Where?	National sample													
How?	Online survey fielded by Lightspeed Research. Respondents are members of Lightspeed Research’s large national opt-in panel, which has access to more than 2 million U.S. households. An array of quotas and data weighting procedures were employed to ensure that results were as demographically representative as possible. Please note that data weighting procedures for the general market adult sample have been adjusted slightly to ensure demographic consistency across waves, and as a consequence 2005-2011 results listed in past Ad Council reports in some cases may have been adjusted by 1-2 percentage points.													

Note: Oversamples of women age 21-40 were included in the 2010-2011 survey; the oversample of women was eliminated in the 2012 survey. This report includes reporting for Adults 21+ and Men 21-35 only. A sampling issue in 2018 resulted in the survey opening back in field in early March (3/3-3/4) for 75 additional completes of males 21-35 (incorporated in both main sample and augment)



Ad Recognition (Aided)

		All Adults (%)				Men Age 21-35 (%)			
% responding		2015 A	2016 B	2017 C	2018 D	2015 A	2016 B	2017 C	2018 D
TV	Backroads	NA	NA	21	16	NA	NA	38 D	28
	Fresh Air	NA	NA	17	18	NA	NA	31	30
	Life's Doors	NA	12	21 B	21 B	NA	25	36 B	34
	Viral Consequences	NA	10	22 B	20 B	NA	25	38 BD	29
RADIO	Expensive Night	8	8	15 AB	20 AB	21	21	30 AB	35 AB
	GPS	9	12	17 A	18 A	20	24	33 AB	35 AB
	Attention Men	NA	10	17 B	13	NA	22	33 B	26
	The Probablys	NA	NA	NA	12	NA	NA	NA	38
	One More	NA	NA	NA	13	NA	NA	NA	27
PRINT/OOH	Probably	NA	NA	NA	20	NA	NA	NA	38
WEB BANNERS	Probably	NA	NA	NA	20	NA	NA	NA	39
	Neon Signs	16	15	27 AB	30 AB	29	31	45 AB	50 AB

Note: Project Roadblock banners, Breathalyzer & Neon Signs print/OOH, and Drive Around & Online Dating radio were removed from the survey in 2018 to accommodate newer "Probably" assets.