

BUZZED DRIVING PREVENTION

Tracking Survey Report
March 2020

Findings for Internal Use Only



Tracking Survey Key Performance Indicators (KPIs)



Campaign
recognition



Likelihood to
drive while
buzzed (intent)



Recently
drove
impaired



Choose
alternative
transport OR
never drink if
planning to drive

Results Summary: Core Target of Men 21-35*

Key performance indicators are all moving in a positive direction.



Recognition of ads with the tagline “Buzzed Driving is Drunk Driving” is 79% among men 21-35, the highest level since the survey began.



Thirteen percent of men 21-35 said they would be extremely or very likely to drive home if feeling buzzed or somewhat impaired, decreasing significantly from the prior year and to the lowest level to-date.



25% of men 21-35 agree that there was a time *recently* when they probably had too much to drink before driving; this is a significant decline from the prior years and substantially lower than the benchmark level.



55% of men 21-35 said they would *always* get a ride/taxi/public transport, the highest level to-date; another 11% said they would never drink if planning to drive.

SURVEY BACKGROUND

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

This report 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.

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 communications programs. Other external factors such as increased ride-share availability likely contribute to shifts in behavioral trends.

Methodology

Method

Nationally
representative online
quantitative survey
(wave 15)

Sample (n=1200)

700 adults 21+
(General Market)
+
Augment sample of
500 males 21-35

From 2005-2018, the annual tracking survey was fielded by Lightspeed Research, Inc.

Starting in 2019, the survey is being fielded by C+R Research, Inc.

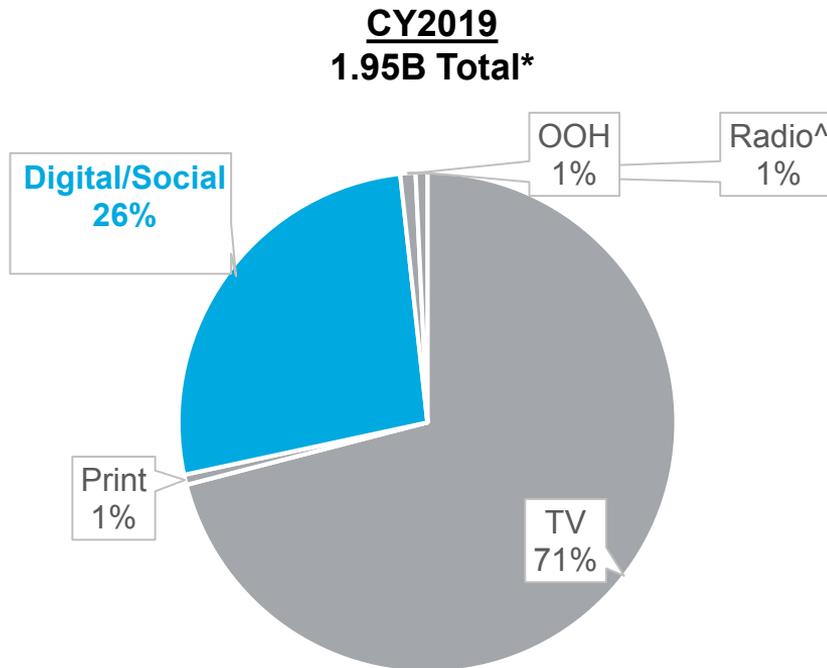
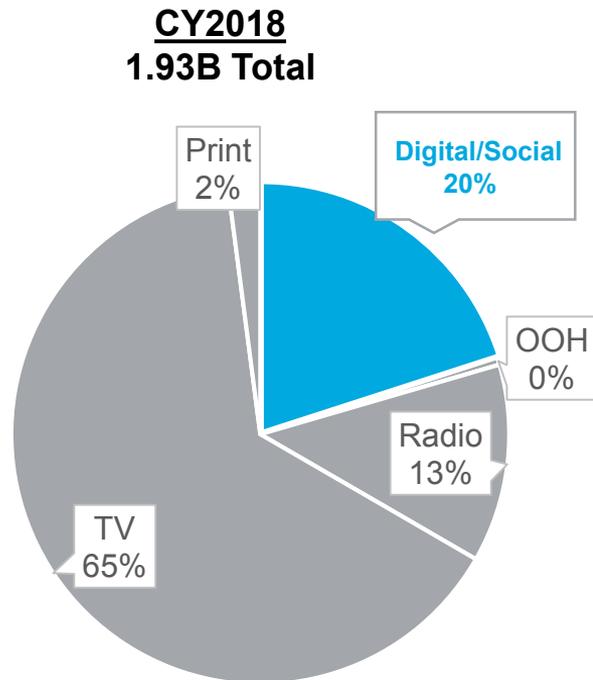
For consistency, the methodology and sampling specifications were kept in-line with the past waves, and quotas and weighting were used for key demographics to match the 2018 survey wave.

Statistical significance is noted throughout report with an asterisk (*p <= 0.05, ** p <= 0.10) as change from year prior.

DONATED MEDIA SNAPSHOT

Donated Media: Impressions Analysis

Share of digital & social impressions continues to increase – the key media priority for the campaign’s target audience.



*Data final through September 2019 for all media types
Traditional OOH impressions not available

^In 2019, radio contributed a lower portion of impressions compared to other media types. This is a trend across Ad Council campaigns – particularly as digital media opportunities increase..

Project Roadblock Detections & Media Value

Preliminary 2019 Data

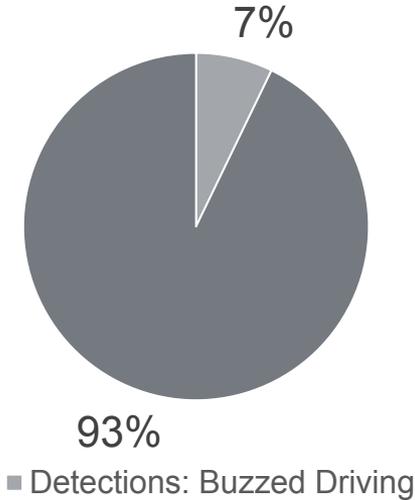
Directly prior to the survey period, the Project Roadblock runs, increasing exposure to the video assets. The 2019 Project Roadblock spurred over 65.8K Local Broadcast Detections and \$8.2M in Local Broadcast Media Value during the official Roadblock period (December 26th to December 31st 2019)

65.8K

Total Local
Broadcast
Detections

61.1K

Project Roadblock
Local Broadcast
Detections Only

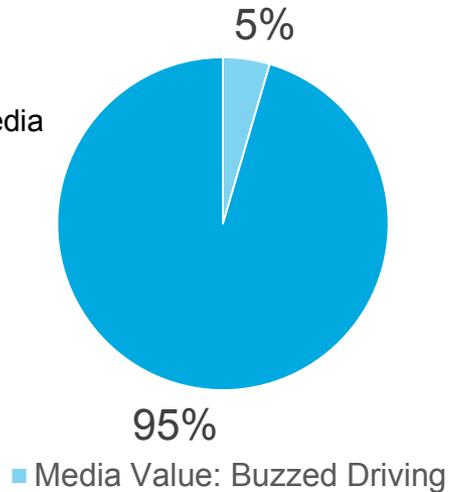


8.2M

Total Local
Broadcast Media
Value (\$)

\$7.85M

Project Roadblock
Local Broadcast
Media Value Only



AWARENESS

Awareness of the campaign remains very strong with 7 in 10 respondents (M21-35) recognizing at least one PSA – and is one of the highest levels among Ad Council campaigns.

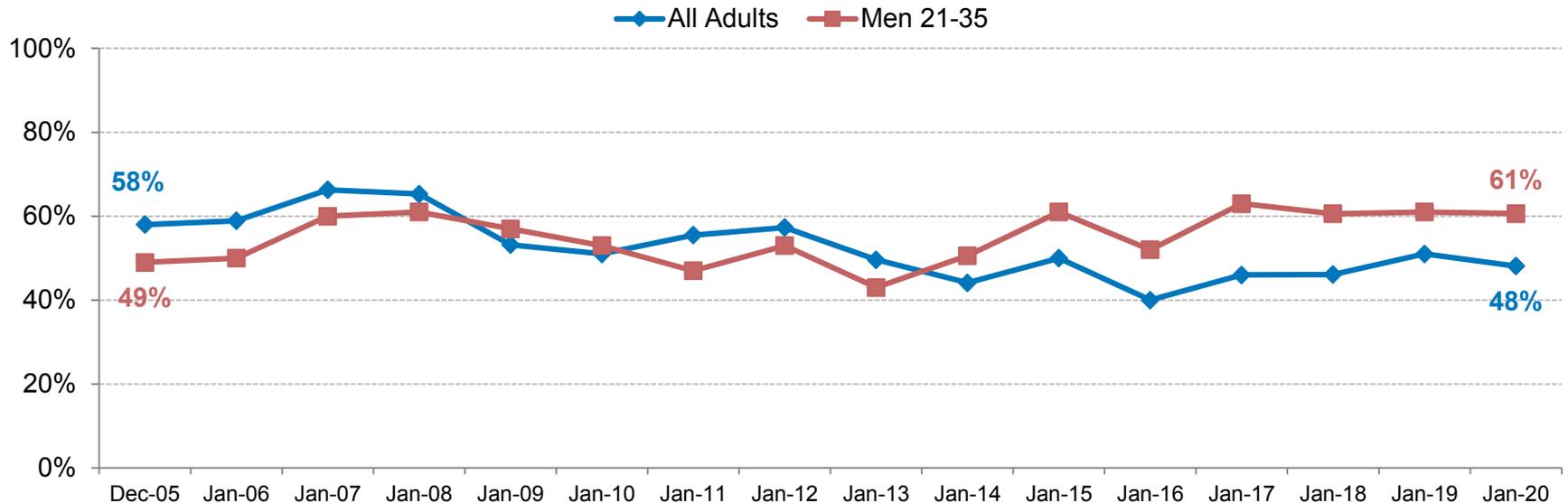
Recognition of the newest assets is still building – however, overall awareness of ads with ‘Buzzed Driving is Drunk Driving’ is at its highest level to date among our core audience.

Men 21-35 continue to report higher levels of campaign recognition than the General Market sample – indicating the media targeting and focus on digital opportunities is working to reach young men.

General awareness of drunk driving prevention messaging has plateaued in recent years.

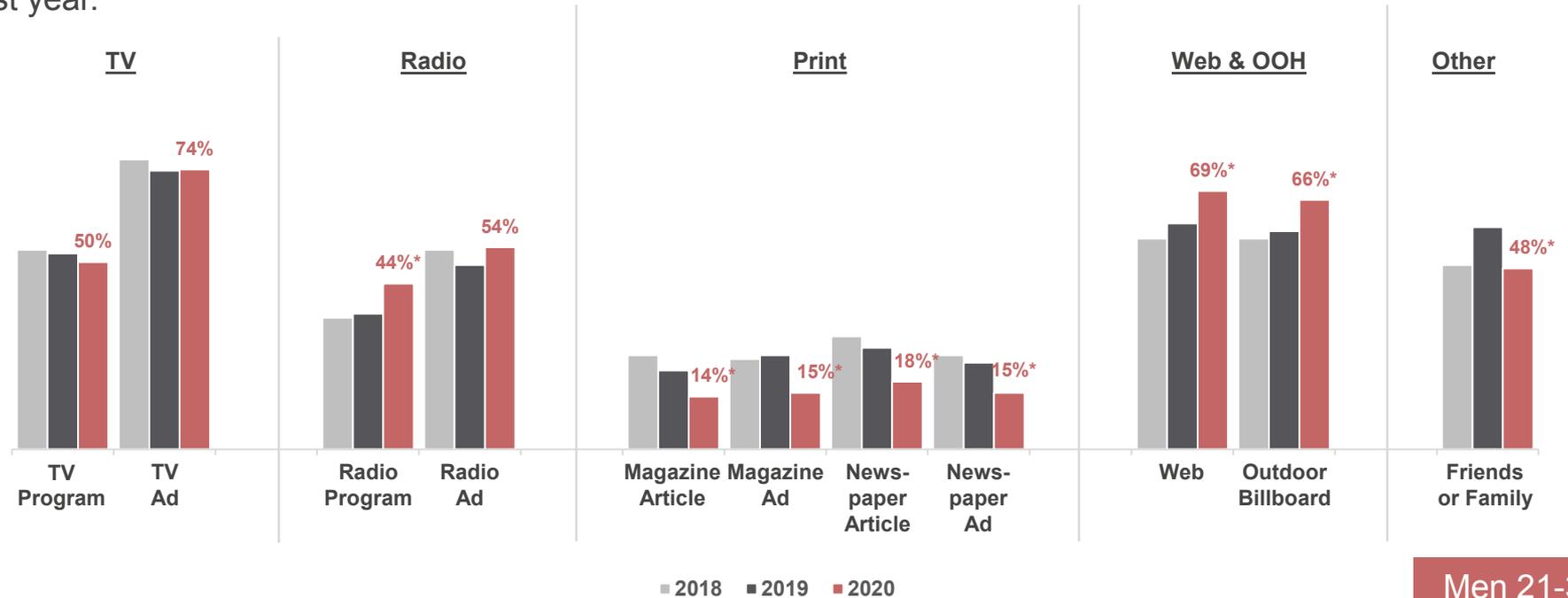
General awareness of any messages about drunk driving prevention is **61% for men 21-35**, in-line with the prior years. Over the life of the campaign, awareness has grown for the core male audience (49% -> 61%) while decreasing for **adults 21+** (58% -> 48%).

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



Top sources of communications reported among men 21-35 include television ads, web, outdoor billboard, and radio ads.

Compared to tracking survey fielded in early 2019, there was a statistically significant increase in radio programming, web, and outdoor billboards as a source. Decreases were seen in print advertising from last year.



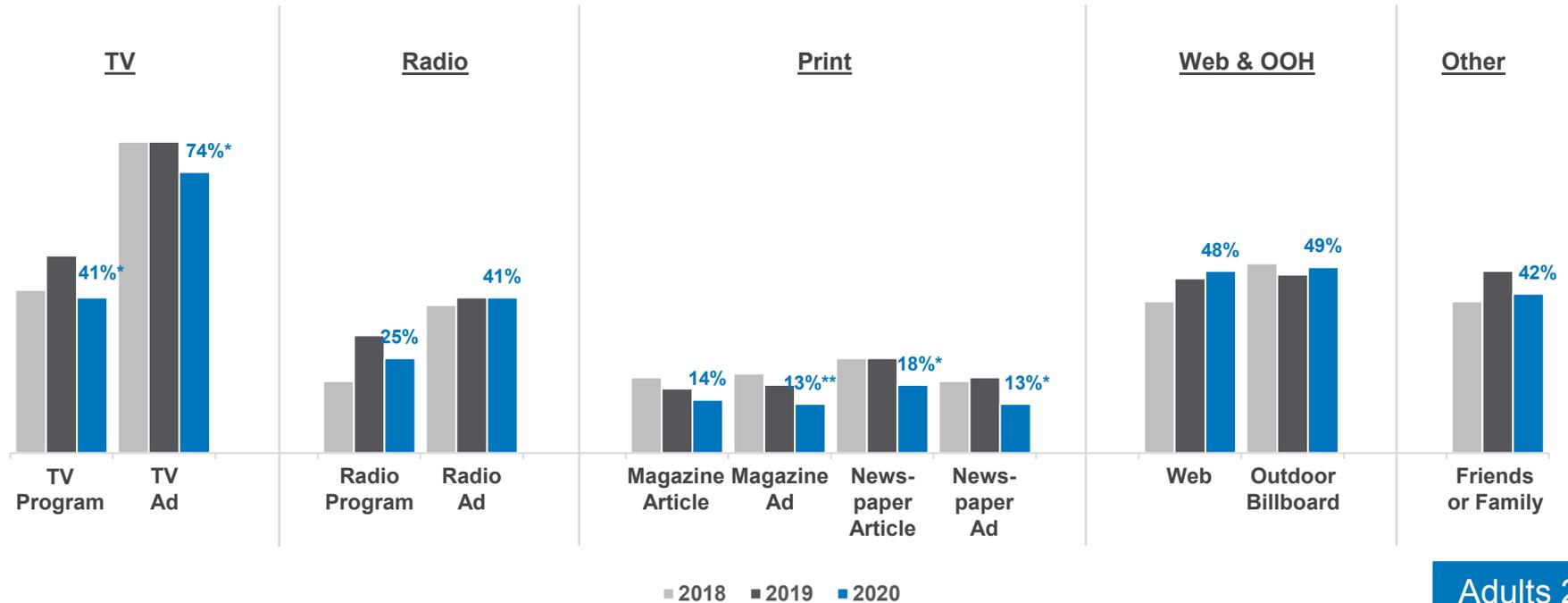
Men 21-35

Base: Say they have recently seen, heard, or read about the issue of drunk driving prevention

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Key drivers of communications reported among adults 21+ include television ads and programs, friends & family, outdoor billboards, and web.

Compared to 2019, several sources of awareness have decreased significantly (Print & TV).



Adults 21+

Base: Say they have recently seen, heard, or read about the issue of drunk driving prevention

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Campaign recognition is very strong across all media types, particularly digital banners and video (online/TV). The core target of **men 21-35** report higher recognition than **adults 21+** across all media types.

Any PSA (net)

69% | **53%**

TV/video PSA (net)

52% | **42%**

Digital PSA (net)

39% | **21%**

Radio PSA (net)

29% | **17%**

OOH PSA (net)

36% | **19%**

Over three-quarters of men 21-35 report awareness of ads with the Buzzed Driving tagline, higher than the recognition level reported for **adults 21+ (68%)**.

Recognition of video remains high due to substantial exposure through the TVB Roadblock in late December, as well as extending exposure through online platforms. Recognition of digital banners and radio assets decreased in 2020 due to removing older, now-inactive assets to accommodate newer ads; these assets have less time in market and lower recognition levels.

	Men 21-35 (%)					Adults 21+ (%)				
	2016	2017	2018	2019	2020	2016	2017	2018	2019	2020
Awareness of any ads w/tagline: “Buzzed Driving Is Drunk Driving”	66	73*	70	74	79	57	64	69	72	68**
Net Video (TV/online)	50	66*	52*	53	52	40	49*	38*	48*	42*
Net Radio	34	48*	50	38*	29*	19	27*	29	25	17*
Net OOH	32	49*	37*	37	36	18	30*	20*	19	19
Net Digital Banner	39	53*	58**	56	39*	20	31*	35	36	21*

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

See appendix for recognition by individual executions.

ATTITUDES & BEHAVIORS

Positive growth was made on key performance indicators for the male 21-35 audience.

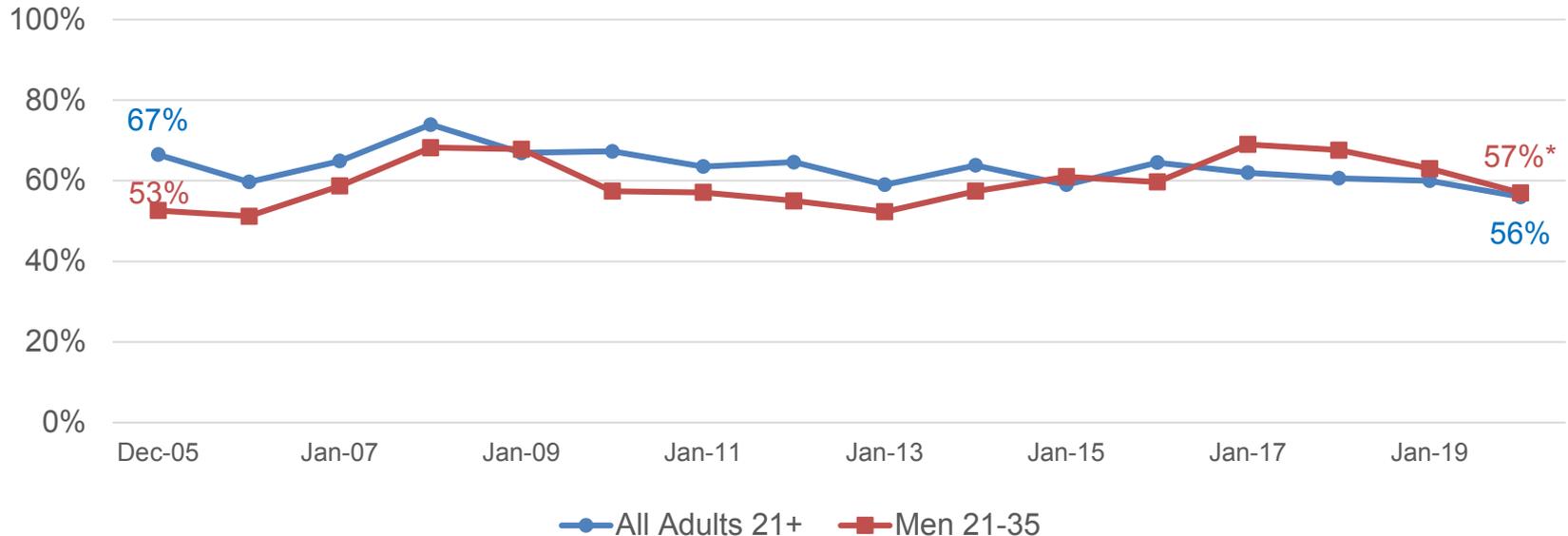
Significantly fewer respondents indicated they would be very or extremely likely to drive if buzzed.

55% of men 21-35 reported they would choose alternative transportation if driving buzzed – **the highest level to-date.**

This measure was flat for adults 21+ -- and slightly lower compared to men 21-35 at 50% - however, there is a higher percentage of adults 21+ who say they will never drink if planning to drive.

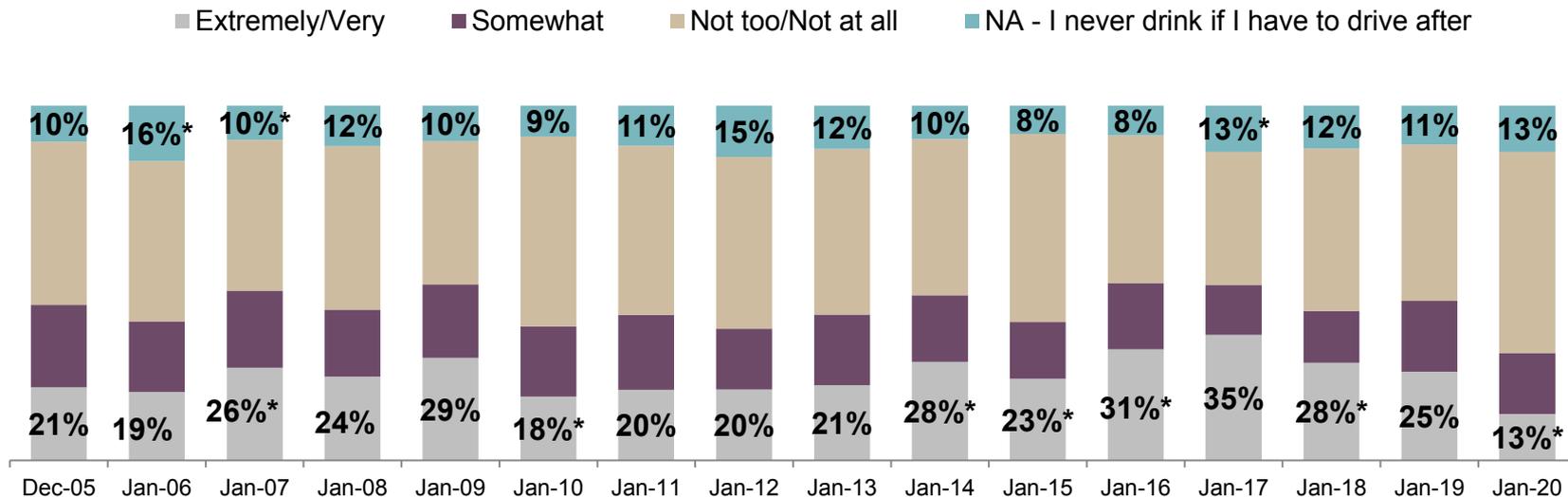
Levels of concern about drunk driving prevention in the community have fluctuated over time; in 2019, **56% of adults 21+** said they were extremely/very concerned, similar to **men 21-35 (57%,** a significant drop from last year).

% Extremely/ Very Concerned about Drunk Driving Prevention



Among men 21-35, 13% said they would be extremely or very likely to drive home if feeling buzzed or somewhat impaired, reaching a new low level. **13% reported never drinking** if needing to drive, similar to last year.

Males age 21-27 (14%) and those age 28-35 (15%) were equally likely to say they would be extremely or very likely.

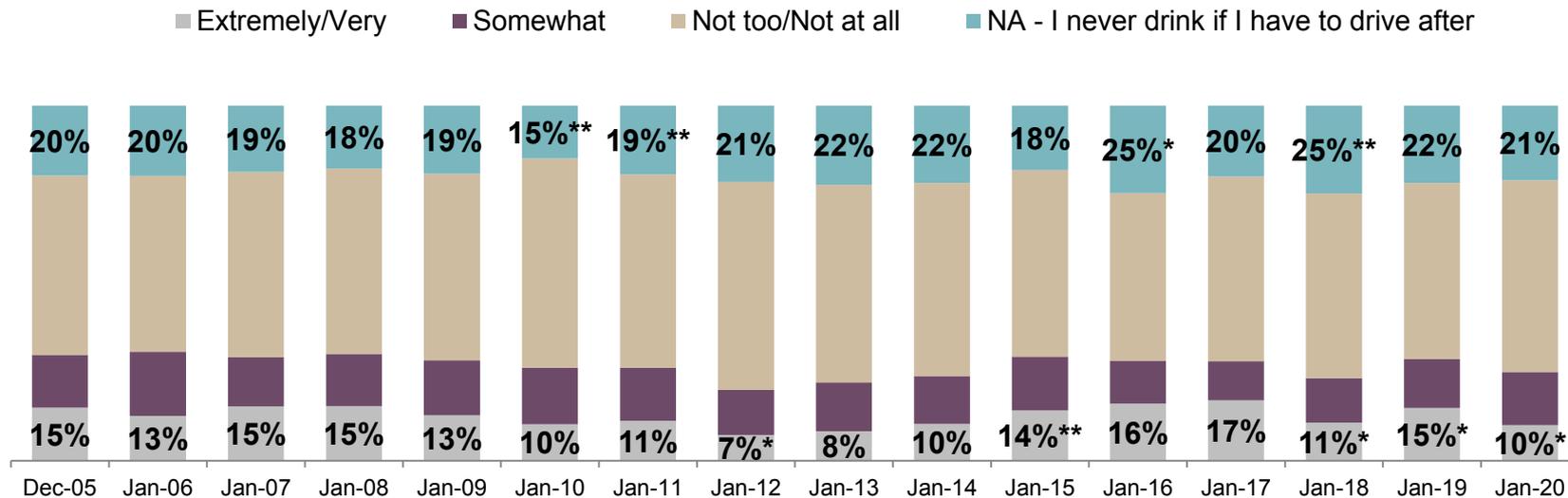


Men 21-35

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Among adults 21+, the percentage who said they would be **extremely/very likely to drive while buzzed** is 10% in 2020, a significant drop from the year prior.

About two in 10 (21%) said they would not drink if they knew they needed to drive afterwards.

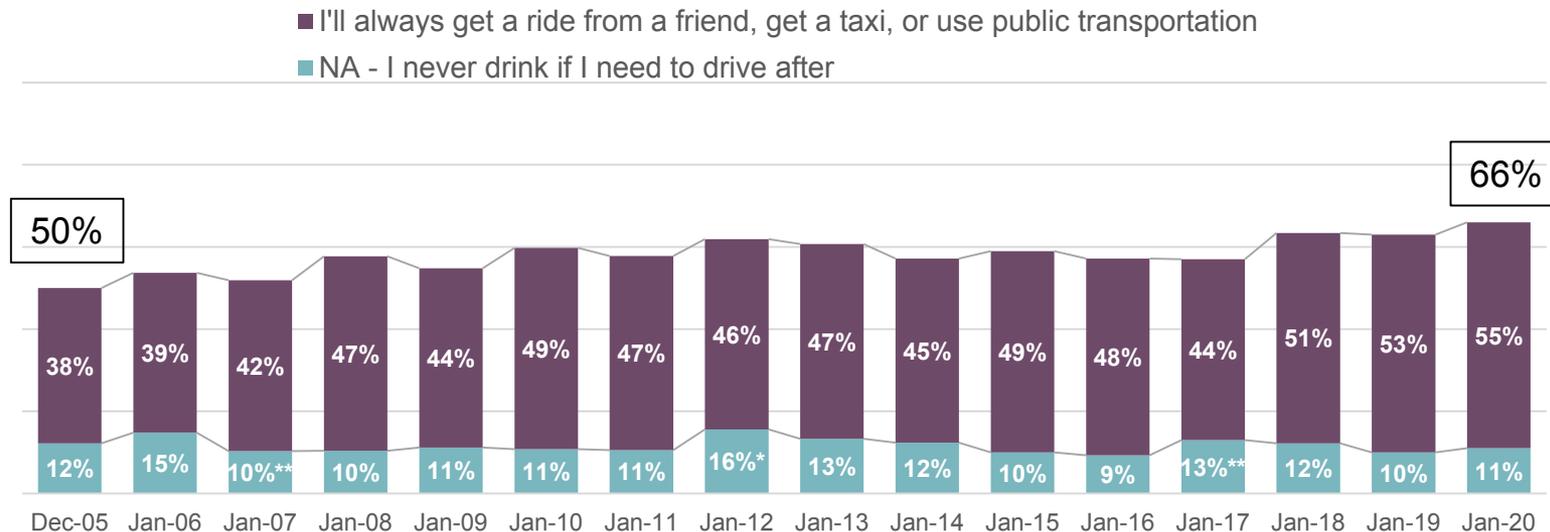


Adults 21+

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Among men 21-35, **66%** said they would **always get a ride/taxi/public transport** or **never drink if planning to drive**; this is up from previous years.

The **55% who report they would seek alternative transport** is an increase from previous years, and the highest number since the survey began. Males age 21-27 (57%) and those age 28-35 (55%) were equally likely to say they will take alternative transport.

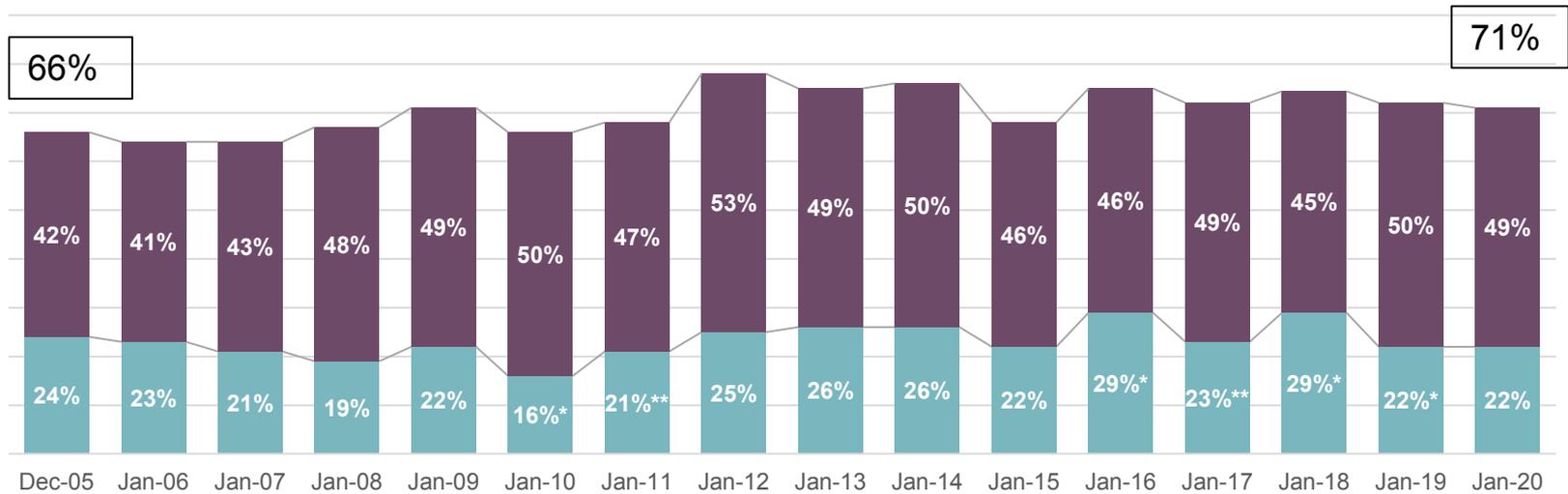


Men 21-35

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Among adults age 21+, **71%** said they would **always** get a ride/taxi/public transport (**49%**) or **never drink if planning to drive (22%)**, on par with the last year.

- 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

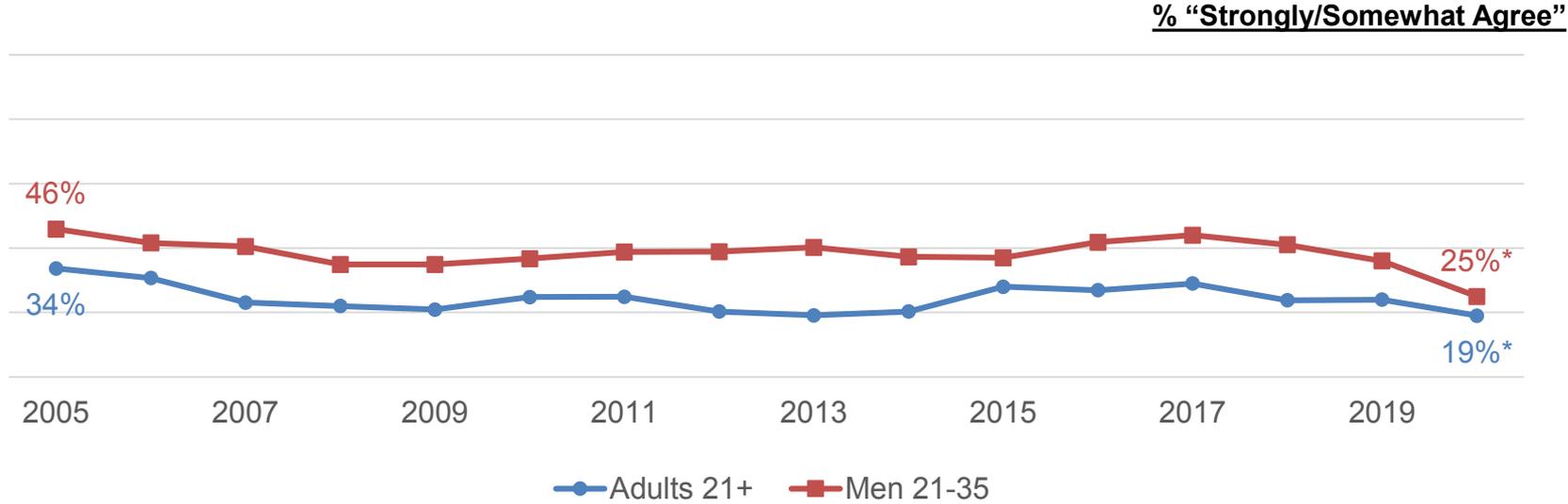


Adults 21+

Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

One-fourth of men age 21-35 (25%) agree that “there was a time recently when I probably had too much to drink before getting behind the wheel.” The trend is moving in a positive direction, with a significant decline from the prior years and the benchmark. Males age 21-27 (22%) were less likely to agree than those age 28-35 (27%).

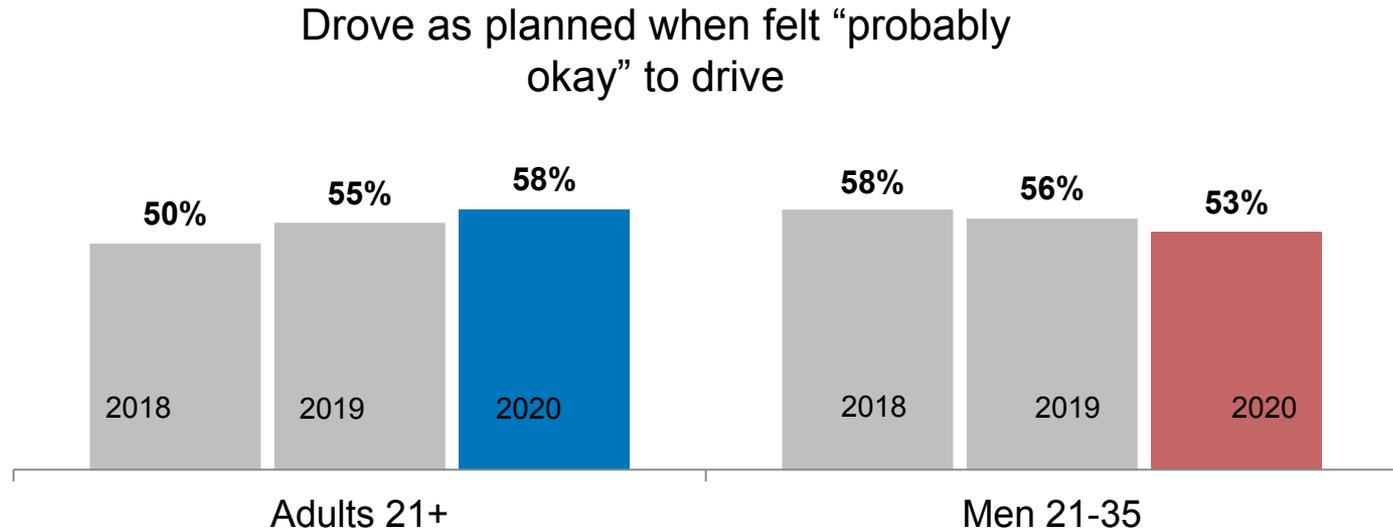
About **two in ten of adults 21+** agree they have done this, significantly lower than 2019 and the benchmark level.



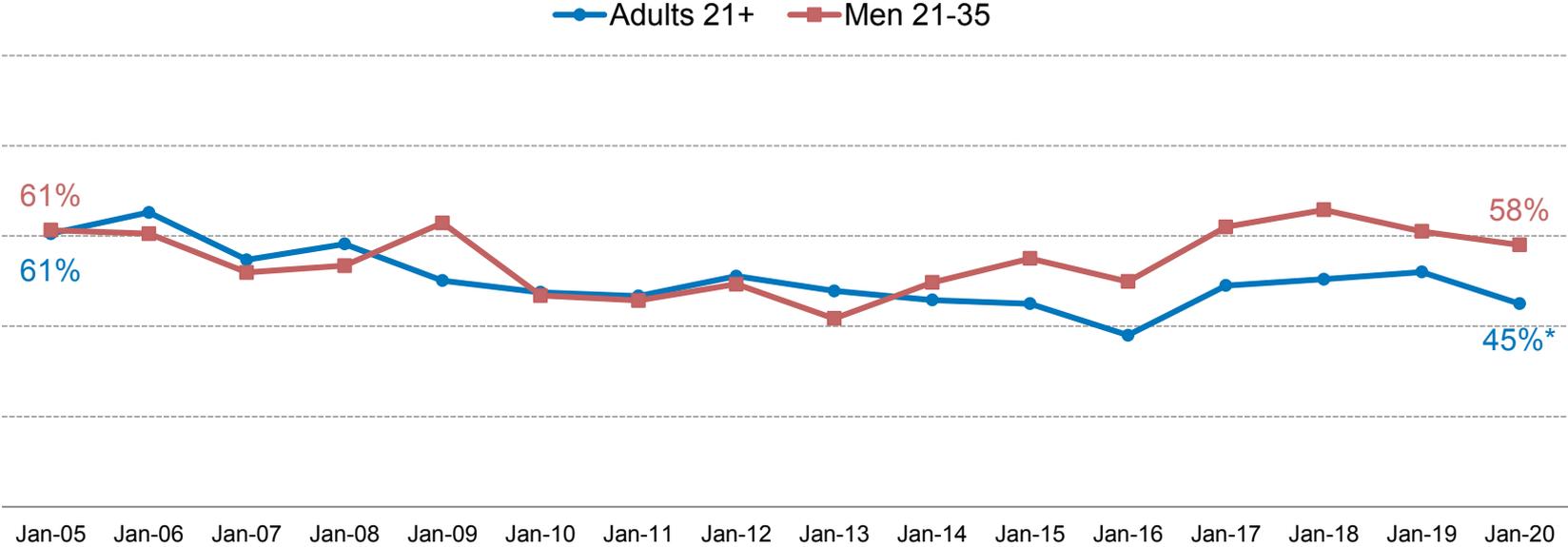
Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Among those who said they had been in a situation where they were probably okay to safely drive but not sure, **58% of respondents age 21+** and **53% of male respondents age 21-35** reported that the last time this happened they chose to drive. These are directional shifts due to the small base size.

Compared to last year, slightly fewer respondents reported being in this situation.



In 2020, **nearly 6 in 10 men 21-35 (58%)** said they have recently had a discussion with friends or family, a drop from 2019 and 2018. Discussions about the risks of drinking and driving among adults 21+ have recently decreased.



Statistically significant as change from year prior (*p <= 0.05, ** p <= 0.10)

Summary

Summary & Implications

Campaign awareness continues to be very high for a PSA campaign, particularly for the core target of men 21-35. Having a dedicated media agency and partners with strong targeting capabilities is working to effectively reach young men.

We continue to see progress on the key performance indicators. There was a significant drop in likelihood to drive buzzed as well as the highest level to date for men 21-35 who report always taking alternative transportation instead of driving buzzed.

The gap is narrowing between young men 21-35 and all adults 21+ on key measures due to significant progress among the male audience. Men 21-35 are still more likely to indicate they have recently driven after having too much to drink, however, compared to adults 21+. Given the recent progress and continued need to reach this audience indicated by this survey and NHTSA data, young men will remain the target audience for the PSA campaign.

We will review the survey questionnaire in advance of the 2021 survey to ensure we are using the right language for the new campaign – which more directly focuses on actions that people take to convince themselves they are okay to drive.

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 Wave 15: January 8-23, 2019 Wave 16: January 6-23, 2020									
Who?	Respondents age 21+; All must drive frequently & must drink alcohol at least occasionally Quotas set for keep demos for consistency															
	<u>Wave 1</u>	<u>Wave 2</u>	<u>Wave 3</u>	<u>Wave 4</u>	<u>Wave 5</u>	<u>Wave 6</u>	<u>Wave 7</u>	<u>Wave 8</u>	<u>Wave 9</u>	<u>Wave 10</u>	<u>Wave 11</u>	<u>Wave 12</u>	<u>Wave 13</u>	<u>Wave 14</u>	<u>Wave 15</u>	<u>Wave 16</u>
	521 Adults 21+	506 Adults 21+	516 Adults 21+	515 Adults 21+	512 Adults 21+	731 Adults 21+	713 Adults 21+	800 Adults 21+	512 Adults 21+	503 Adults 21+	520 Adults 21+	504 Adults 21+	702 Adults 21+	775 Adults 21+	700 Adults 21+	709 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	612 Men 21-35	618 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?	2019-2020: Online survey fielded by C+R Research, Inc. 2005-2018: Online survey fielded by Lightspeed Research, Inc.															

Notes: 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). In 2019, for the general market sample (adults 21+), compared to the prior year, there is a significant difference in the percentage of low-income age 55+ that could not be addressed through weighting.

Ad Recognition (Aided)

		Men Age 21-35 (%)					Adults 21+ (%)				
% responding		2016	2017	2018	2019	2020	2016	2017	2018	2019	2020
		A	B	C	D	E	A	B	C	D	E
TV/VIDEO	Holiday Party	X	X	X	18	20	X	X	X	13	16
	Emojis	X	X	X	30	33	X	X	X	19	24
	Selfies	X	X	X	28	25	X	X	X	19	22
	Dating App	X	X	X	28	27	X	X	X	20	20
	Backroads	X	38 CD	28	27	X	X	21	16	25 C	X
	Fresh Air	X	31	30	29	X	X	17	18	21	X
	Viral Consequences	25	38 ACD	29	27	X	10	22 A	20 A	23 A	X
	Playoffs	X	X	X	X	16	X	X	X	X	13
	Legend	X	X	X	X	17	X	X	X	X	16
	BBQ	X	X	X	X	14	X	X	X	X	9
Over the Top	X	X	X	X	17	X	X	X	X	10	
RADIO	The Probablys	X	X	28	26	X	X	X	12	16	X
	One More	X	X	27	29	X	X	X	13	20 C	X
	Play by Play	X	X	X	X	15	X	X	X	X	10
	Love Fest	X	X	X	X	22	X	X	X	X	13
PRINT/OOH	Probably	X	X	38	37	36	X	X	20	19	19
WEB BANNERS	Emojis	X	X	X	21	17	X	X	X	14	12
	Probably	X	X	39	34	31	X	X	20	18	16
	Neon Signs	31	45 A	50 AD	42 A	X	15	27 A	30 A	26 A	X

- Assets removed from survey in 2020: Backroads/Fresh Air/Viral Consequences (TV), The Probablys/One More (Radio), Neon Signs (Web)
- Split samples were used for select TV and radio to limit survey length. 'X' means ad was not included in that survey wave.
- A/B/C/D indicates that the number in that column is statistically significant increase compared to the number in the column indicated (95% confidence level).

PSAs in the Survey

TV/ Online Video

Digital

Legend



Dating App



Holiday Party



Probably Okay



Emojis



Over the Top Affection



Selfies

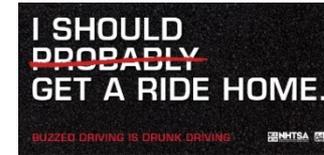


Playoffs



Outdoor

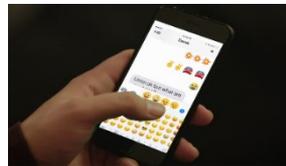
Probably Okay



BBQ



Emojis



Radio

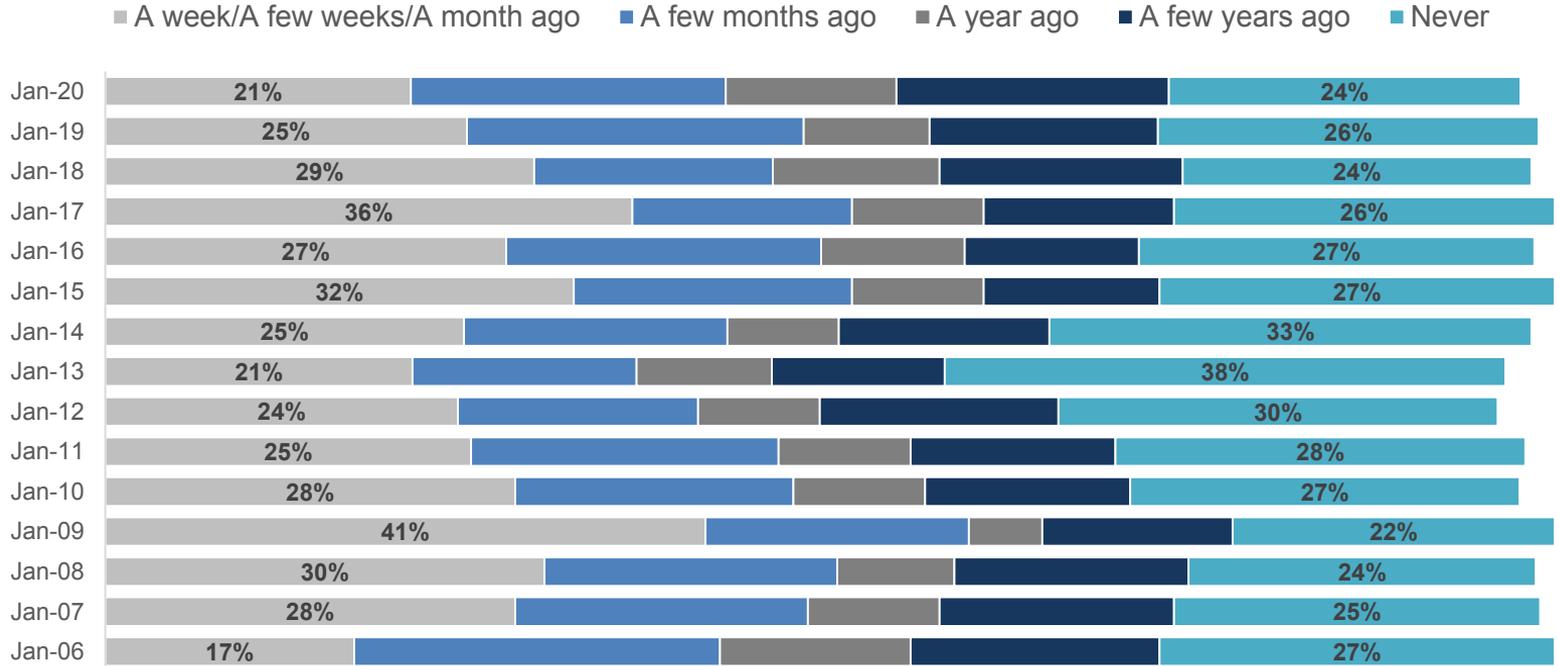
Play-by-Play



Love Fest



In January 2020, **21%** of male respondents age 21-35 reported that they had refrained from driving after drinking despite originally planning to drive within the past month.



In January 2020, **10%** of all respondents age 21+ reported that they had refrained from driving after drinking despite originally planning to drive within the past month.

