

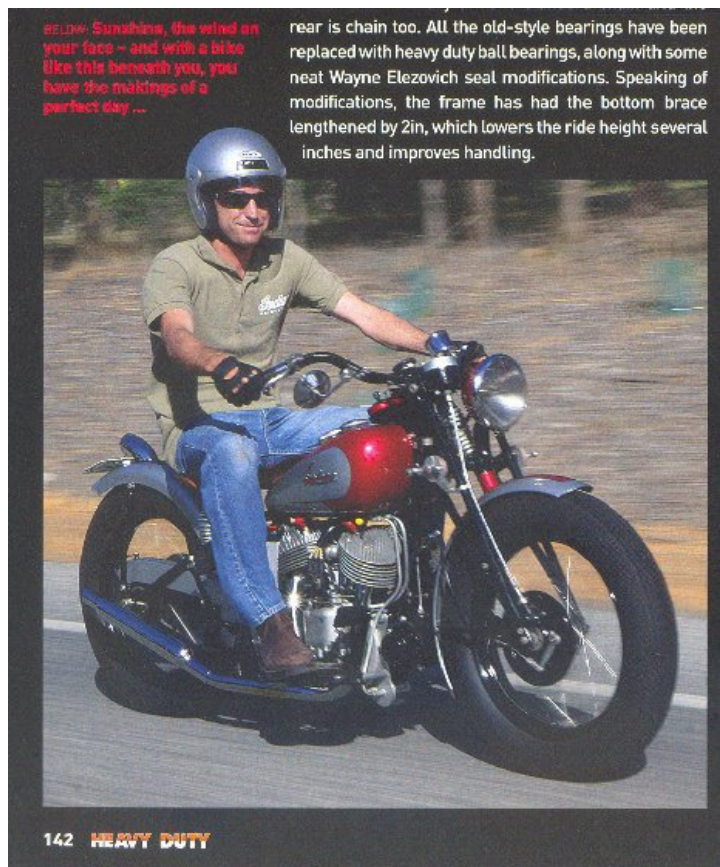


Currie

The Vital Communications Ingredient

VicRoads

Motorcycle protective clothing communications audit



Final Report

Prepared by Currie Communications – June 2009



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Executive Summary

The motorcycle protective clothing communications audit, conducted on behalf of VicRoads, has established that while there are a number of industry stakeholders communicating the motorcycle protective clothing message to riders, the approach is uncoordinated and fragmented. However, there are significant opportunities for the industry to enhance communications and, in so doing, potentially reduce injuries and save lives.

Research carried out amongst motorcyclists, retailers and media reveals that motorcyclists are a disparate group. For example, sports riders display little in common with cruiser riders and scooter riders have very few similarities in attitudes and behaviour to other motorcyclists.

"Remember, scooter riders are different. They don't see themselves as part of a community like motorcyclists are. They don't think they need any protective clothing except a helmet." Jeremy Bowdler, Scooter Magazine

Many motorcyclists do not perceive a high risk of a serious crash or injury and believe they are careful riders moving at cautious speeds. This is particularly the case for scooter riders. This is a key issue and a challenge for communications.

In conducting the audit, Currie Communications has established some primary reasons for riders not wearing protective clothing. Heat is the number one factor, followed by 'only going on short distances'. These findings are in line with the research carried out by the Transport Accident Commission (TAC).

The audit established that riders don't generally replace motorcycle protective clothing regularly, so a key opportunity to influence motorcyclists is when they first purchase.

As part of the audit, Currie conducted a literature review. This found that there are a number of magazines that publish images of riders wearing inappropriate protective clothing. This has led to a suggestion that a code of conduct should be set up for the industry, not just for magazines but for all advertising that features motorcycle riding imagery.

While some motorcyclists and stakeholders felt that the TAC advertising was too 'big brother' in its approach, the high levels of recall and mentions as effective advertising demonstrates an ongoing role for mainstream advertising.

The ideal scenario is to dovetail the mainstream advertising with targeted and tactical communications. This addresses the barriers to wearing protective clothing and focuses on new riders and scooter riders – the two primary target audiences.

There is a tremendous opportunity for VicRoads to demonstrate a leadership role in working with the industry to facilitate a more coordinated and rigorous approach to the communication of protective clothing. One of Currie's suggestions is for a protective clothing working group to be established, lead by VicRoads.

This Final Report provides a set of conclusions and recommendations to assist VicRoads in developing priority areas for future communication activity to increase the take-up of motorcycle protective clothing.



Background and Aims

Currie Communications was engaged by VicRoads in December 2008 to conduct an audit of the current program of communications used to promote motorcycle protective clothing by VicRoads, the Transport Accident Commission (TAC), and other key stakeholders. The aim was to identify any gaps in this communications program and recommend a strategy to address them accordingly.

The project commenced on 14 January 2009 and involved five key stages:

- Stakeholder interviews;
- Literature review;
- Online survey;
- Focus groups; and
- A stakeholder workshop.

Stakeholder interviews

Twenty two (22) interviews were conducted with stakeholders (see Appendix A) to ascertain perceptions of their role in promoting protective clothing. This included any protective clothing promotional activities they carry out, their views on current communications and the potential role they could play. The interview questions are set-out in Appendix B.

Literature review

Currie conducted a review of magazines, websites, collateral and research papers with a view to highlighting where and how motorcycle protective clothing is being portrayed and promoted. The research analysis also included 'opportunities for the future' where Currie rated each item as either a low, medium or high priority for VicRoads. The key recommendations identified from the literature review are included in Appendix C.

An interim report was prepared following the stakeholder interviews and the literature review. This is included in Appendix D.

Online survey

An online survey was conducted with 200 motorcyclists in February. The survey aimed to establish the reasons for not wearing full protective clothing, impressions of the current communication to promote protective clothing, their sources of information and their behaviours in regards to events, websites, magazines and retailers. An online report is included in Appendix E.

Focus groups

Following the online survey, focus groups were held with the four key rider target groups. These included scooter riders, cruisers, sport riders and tourers. An average of seven riders attended each group.

The focus groups enabled a deeper discussion and more in-depth analysis of the reasons for not wearing full protective clothing, effective communication channels and where riders source information. In addition, participants at the focus groups were asked what key messages and communication channels they think should be used to promote protective clothing. A report of the focus group findings is included in Appendix F.



Stakeholder workshop

A workshop was conducted with industry stakeholders identified as having the greatest potential role in promoting motorcycle protective clothing. Attendees included:

- Liz de Rome – Liz de Rome & Associates - Director;
- Peter Stevens – Mark Boag, Group Accessories Manager;
- Draggin Jeans – Fiona Mackintosh, General Manager;
- Deca Training – Paul Willingham, Branch Manager and Vanna Lau, Trainer;
- TAC – Shenagh Macrae, Marketing Project Manager and Samantha Cockfield, Manager, Road Safety;
- VACC – Peter Dunphy, Manager, Motorcycle Industry Division; and
- VicRoads – Chris Brennan, Project Manager, Motorcycle Safety; and
- Barry Scott, Pedestrian and Motorcycle Safety Consultant.

The aim of the workshop was to share the research findings with stakeholders, collectively establish key target audiences for future communication and identify tools and tactics that could be developed to reach them.

Key observations and assumptions

Stakeholder interviews

The five stand-out findings from conducting the stakeholder interviews are:

- The approach to communicating the protective clothing message is uncoordinated;
- Views from non-motorcyclist and motorcyclist stakeholders vary greatly;
- Motorcyclists are not a homogeneous group and require tailored and targeted communications rather than a broadcast approach involving mass media;
- The industry lacks a credible organisation to promote motorcycle protective clothing; and
- There are numerous opportunities to improve the communication of motorcycle protective clothing and stakeholders are willing to assist.

Firstly, there are a number of stakeholders conducting activity to promote protective clothing but there isn't a coordinated industry approach. An opportunity exists for a group of stakeholders from the Victorian Motorcycle Advisory Council (VMAC) to work together on an ongoing basis to maintain the momentum following this audit. This VMAC subcommittee, which would have its own title, would also act as a credible group to promote protective clothing and galvanise stakeholders who are willing to support.

As views from motorcyclist and non-motorcyclists differ greatly, it is important that this group consists of both motorcyclist and non-motorcyclist representatives.



Although the stakeholder interviews identified that some motorcyclists and stakeholders thought that TAC advertising was too 'big brother' in its approach, it is worth noting that the research findings did not necessarily concur. Instead, the quantitative and qualitative research found that there were high levels of recall of the TAC advertising and recognition of it as effective communication. As a result, Currie sees a role for mainstream advertising **as well as** a role for tailored and targeted communications.

Other key observations from the stakeholder audit include the inability to advertise a scooter training course because all riders obtain a motorbike licence. The training provider that mentioned this issue confirmed that scooter riders don't believe that literature and some elements of training applies to them. By having a specific scooter training course, riders would pay more attention to the protective clothing messages and be more likely to act on them.

Stakeholders were forthcoming with ideas and suggestions for improving the communications of protective clothing. Additional points raised were:

- 'Scooter' magazine has conducted research into friction on a variety of protective clothing in the past. They maintain relationships with testing laboratories in order to disseminate information for readers and offer advice on the best products. VicRoads should seek further information from the Editor, Jeremy Bowdler, with an opportunity to forge mutually beneficial relationships, especially in light of negative images within this particular magazine;
- Approach the Federal Government with a view to removing the GST on all protective clothing;
- Improving relations with the TAC and access to their motorcycle research, especially forthcoming data into what riders were wearing when they crashed and data from the University of NSW's helmet protection survey;
- VicRoads spokespeople should visit each major retailer in conjunction with the TAC, talk to sales personnel and provide data as well as literature;
- Build relations with Draggin Jeans as it sets a high European standard for testing their protective clothing and is striving to be a leader in their field;
- Be alert to interstate opportunities. Although Victoria is leading the charge in motorcycle safety, other states may have implemented effective programs to encourage protective clothing;
- Superbike School has a database of 30,000 riders who have inquired or completed a course. Superbike School communicates with them twice annually by mail and emails monthly. This is a good communications channel to target; and
- Insurance companies are a good target for a communications campaign. Make them aware of available data and ensure the companies are more aware of motorcyclists and scooter riders.



Literature Review

A review of motorcycling magazines found that many demonstrate full protective clothing in all their images. The exceptions were 'Scooter' and 'Heavy Duty' magazines. It is worth noting that most images of riders not wearing protective clothing appear in advertisements for motorbikes, scooters or accessories such as glasses.

According to Jeremy Bowdler, editor of 'Scooter' magazine:

"When we have control of imagery in our magazine, we ensure protective clothing is used. Unfortunately, some material is submitted on a casual basis or for specific advertisements which we cannot control."

Editors for motorcycle or scooter magazines are positive about illustrating protective clothing, but revenue from advertising is vital to their business. Consequently, a 'blind eye' is taken with some imagery in order to maintain revenue. To overcome this, VicRoads needs to target the manufacturers themselves.

Manufacturer brochures and sales catalogues generally illustrate full motorcycle protective clothing. On close inspection, point of sale material from Vespa, Triumph, Suzuki and Honda all had contained images of motorcyclists wearing protective clothing.



Most websites, including industry websites, are content driven and have a limited number of images, especially of riders.

Quantitative and Qualitative Research

The findings from both the online survey and the focus groups demonstrate that scooter riders differ from other categories of riders. They are also the least likely to wear full protective clothing as demonstrated by these comments from scooter riders.

"I think wearing protective clothing makes me look stupid." - Alex

"If I plan to do 100km/hour on a highway I will wear it, but low-risk in the city."
- Douglas

"I don't wear protective clothing as I need to look good for work." - Alex

"Convenience is key for scooter riders, and protective clothing is inconvenient." - Athan

Scooter riders do not perceive they're at high risk of having an accident, they think the clothing is inappropriate for them and that it is an inconvenience to wear it. For female



scooter riders in particular, there was a consensus that the clothing didn't fit women well and wasn't stylish or sleek.

For scooter riders, it's not just about communicating the need for protective clothing. In the words of one scooter rider:

"The messages of protective clothing are definitely out there, but more trendy products need to be introduced to encourage use as people are lazy and will take risks whenever they can." - Stuart

One of the problems in communicating with scooter riders is that they are a broad audience and they don't fit into a 'community' in the same way that cruiser, tourer and sport riders do. This makes communicating with them much more challenging.

Scooter riders are quite different to other categories because they are the least likely to belong to a club, attend events, read motorcycling magazines or visit motorcycling websites. However, they are the most likely category to source scooter information from the internet.

Another issue mentioned by both stakeholders and motorcyclists is the lack of separate statistics for scooter rider injuries and fatalities. For this reason, consideration should be given to splitting the data so a compelling case can be made to scooter riders. At present, when they see statistics on motorcyclists they don't think it applies to them.

For other groups of motorcyclists, the main influencers for wearing/always wearing protective gear were:

- Being personally involved in a serious crash, involving injury;
- Having a close friend or partner involved in a serious crash, involving injury;
- The influence of a close family member (parents for young riders, spouses for older riders) or becoming a parent themselves; and
- Training organisations, for new riders.

The key reason for not wearing protective clothing is heat. The secondary reason is 'going on short distances', followed by 'takes too much time/too much work'. Despite leg injuries being the most common form of injury, protective pants were the least likely item to be worn.

"I don't wear a jacket in hot weather or for short-trips. I love the sense of freedom." - cruiser rider

This research was consistent with the TAC's research. As a result, the TAC is developing new advertisements targeting riders in the heat, riding short distances and the expense of protective clothing.

With the TAC addressing specific barriers to protective clothing, VicRoads in conjunction with other stakeholders, can demonstrate a leadership role in addressing additional communication issues and opportunities.

"We need a star rating for protective clothing that is national and universal." - tourer rider



"I am all for a star-rating system for protective clothing as I want to know how safe one pair of pants is over another. That will also encourage manufacturers to raise their standards." – sport rider

A star rating system was mentioned a few times in the focus groups and when this eventuates it will be a huge step forward for motorcycle protective clothing.

Another key finding was that motorcyclists purchase clothing in stages. For example, a helmet, jacket, gloves and boots are bought first, then pants and additional gear for weather conditions, or when budget allows.

"I have slowly built up more protective clothing over the years as I can afford it."
– cruiser rider

It does not appear that protective clothing is updated frequently by riders, so encouraging the purchase of **full** protective clothing during that **first** sale is crucial.

In developing future communications, the source of information also plays an important role in ensuring protective clothing messages have cut-through with riders. In the online survey, more than half (57%) the respondents reported that suppliers/retailers are their primary source of information on protective clothing. The focus group participants concurred, particularly for first-time riders without motorcyclist friends or family members for guidance. When asked who is able to provide expert advice, suppliers/retailers topped the list at 41 per cent.

When selecting a spokesperson, it should be kept in mind that riders in the three motorcycle focus groups (non-scooter) all felt that celebrities didn't hold much weight and they would pay more attention to fellow riders. Comments included:

- *"A rider who is going through rehabilitation after an accident."* – tourer rider
- *"Other real riders are vital in campaigns as they speak from experience."* – tourer rider
- *"Other riders are the best judge."* – cruiser rider
- *"I associate with other riders best."* – sport rider

And in terms of communications channels, it is worth noting that the use of the internet as a source of information and advice appears to be increasing, particularly among younger riders. Websites, forums and chat sites are accessed to obtain a broad range of information about motorcycle issues, including protective clothing.

"Did internet search before going to retailer to purchase." – sports rider
"I think some viral campaigns have been excellent e.g. Bluetooth and popcorn popping, and this type of thing could be done with protective clothing. Using U-Tube or the Motorcycle Australia website forums or for viral campaigns are a good idea." – sports rider

Stakeholder workshop

Following an analysis of the research findings, 11 key stakeholders were selected to attend the workshop. One stakeholder, Monza Imports, was unable to attend.

The workshop attendees were all knowledgeable in their own area, were keen to find out how they could assist in promoting motorcycle protective clothing and worked well



together as a team. It would be opportune to harness this experience and enthusiasm in the form of a motorcycle protective clothing working group in the future.

Specific feedback from stakeholders at the workshop includes:

- Draggin Jeans provides their protective clothing to HART to illustrate to learners;
- Peter Stevens does staff product training every Friday morning weekly;
- DECA demonstrates the benefits of protective clothing and pricing ranges in its courses;
- Mark Boag from Peter Stevens stated that the larger retailers and small, family retailers are helpful in providing information about protective clothing, whereas those mid-sized retailers and car dealers selling scooters are often more ignorant;
- NSW researcher Liz de Rome stated that many manufacturers provide promotional material to assist sales that is not scientifically or independently tested or proven as beneficial in the prevention of injury. Some crash performance testing has proved that there is no relationship between cost and performance of protective clothing;
- Liz de Rome provided the following New Zealand website for interest: www.rideforever.co.nz
- Peter Dunphy stressed the need for a protective clothing code of conduct through the FCAI as well as a code of conduct for advertising.

It was also agreed that separate statistics for scooter riders and motorcyclists would be beneficial as both groups are different. Separate training materials were also mentioned.

Raising awareness of the more extensive range of hot weather protective clothing is a priority as many riders are not aware of what is available.

VicRoads Chris Brennan provided an insight to the 5 star rating system for protective clothing. This system is currently being developed and is likely to be trialled in the months ahead.

A key function of the workshop was to discuss and prioritise key target audiences. This was followed by a brainstorming session to identify new tools and tactics to promote motorcycle protective clothing among the key target audiences. However, due to time constraints, only learner riders and scooter riders were discussed in depth.

The following section contains the tools and tactics identified during the workshop. Each has been given a rating based on the level of support and interest of stakeholders, and likely positive impact. The rating is:

3 = high;
2 = moderate; and
1 = low.

An indicative cost has also been provided. Please note these tactics have not been fully costed, nor subjected to a full feasibility assessment.



In addition, Currie suggests that retailers could consider a financial incentive for learner motorcyclists to purchase all their motorcycle protective clothing at once, thereby capitalising on the 'first sale' opportunity.



Action Plan and recommendations

Audience	Tactic	Next Steps/Responsibility	Priority Level	Feasibility/Cost/Timing
1. Stakeholders				
1.1	A Code of Conduct to be introduced, possibly in conjunction with VACC and FCAI that would govern how images of motorcyclists and scooter riders are portrayed in imagery. This would include websites, magazines, adverts etc.	VicRoads to hold discussions with VACC and FCAI about developing a Code of Conduct.	High	A commitment to make it happen will be key here. Resources in terms of personnel and time will need to be allocated. Meetings would need to be set up with key magazines and advertisers to discuss the introduction of the code. Estimate 12 months to complete. Rating: 3 Cost: \$10k
1.2	Establish a Motorcycle Protective Clothing Stakeholder working group to develop the ideas generated as a result of the audit. This will enable a coordinated approach to future communications.	Canvass opinions of those that attended the workshop.	High	Again, a commitment to make it happen will be key. Suggest the working group is established post final report. Meetings to take place four times a year to discuss priorities/actions. Rating: 3 Cost: \$8k
1.3	Separate scooter crash statistics to enable scooter riders to understand their level of risk.	VicRoads to discuss with TAC.	Medium	If VicRoads can identify this data it can be fed into other areas and collateral. Rating: 3 Cost: To be determined
1.4	Star rating system. All stakeholders and motorcyclists agreed this was a great opportunity for the industry.	VicRoads is progressing with this system.	High	As this is a separate project it won't be assessed in this document.



Audience	Tactic	Next Steps/Responsibility	Priority Level	Feasibility/Cost/Timing
2. All learner riders				
2.1	Add more questions on protective clothing to the theory test and/or create an online protective clothing theory test for learners and novices.	Discuss internally whether changes to the test could be implemented cost-effectively. If not, a test on protective clothing could be added to the VicRoads website under learner riders.	High	As VicRoads is responsible for the testing, this should be relatively easy to implement. To keep costs to a minimum we recommend including with other updates eg. new road rules. Rating: 3 Cost: To be determined
2.2	Add more information on protective clothing to the <i>Victorian Rider</i> handbook. This could be in the form of a quiz or a checklist.	Discuss internally proposed changes to the handbook.	High	In conjunction with the above tactic, the <i>Victorian Rider</i> handbook would be changed to reflect the questions on protective clothing. Again the update to the handbook would be done with other changes eg. new road rules. Rating: 3 Cost: To be determined
2.3	More point of sale material provided at retail outlets. Collateral could include TAC quiz, checklist, leaflets, CDs or DVDs.	A meeting with retailers to be organised to discuss what materials could be most beneficial.	High	This is potentially a huge project and VicRoads may need to consider outsourcing if resources aren't available internally. Rating: 1 Cost: \$50K plus
2.4	Online warning messages with the risks involved in buying second-hand gear displayed on websites such as 'Spokes', Motorcycle Accessories Supermarket etc.	VicRoads to discuss with 'owners' of the websites.	Medium	A relatively small project with potentially less impact than others. Rating: 1 Cost: To be determined
2.5	Distribute brochures/quiz with the TAC 'ridesmart' DVD.	VicRoads to cost activity.	Medium	The tactics identified under training providers may have a greater impact and cost less to implement. Rating: 2 Cost: \$15k



Audience	Tactic	Next Steps/Responsibility	Priority Level	Feasibility/Cost/Timing
3. Scooter riders				
3.1	Adverts placed in arts/café arenas such as Federation Square, St Kilda and Albert Park. Consider advertising at Moonlight Cinemas.	Hold discussions with TAC about ways VicRoads and other stakeholders can assist in reaching Scooter riders. (TAC)	Medium	We recommend that ideas 3.2 – 3.5 are taken over by TAC.
3.2	Target university student unions with point of sale material.	TAC	Medium	
3.3	Create mainstream advertisements to media, especially female print publications.	TAC	High	
3.4	Ambush marketing, as per the current TAC approach.	TAC	Medium	
3.5	Online messages on scooter sales sites as a reminder to budget for protective clothing.	TAC	High	



Audience	Tactic	Next Steps/Responsibility	Priority Level	Feasibility/Cost/Timing
4. Training Providers				
<i>"My bike trainer was good with advice. The last thing he said to me was 'jacket, pants and gloves' and I have remembered that." – Tourer rider</i>				
4.1	Brochures promoting the appropriate protective clothing distributed with training course registration details. This would ensure learners know what clothing is recommended for motorcyclists.	VicRoads to arrange a meeting with all training providers to discuss materials and information it can provide. VicRoads to produce and distribute materials to training providers.	High	This would require buy-in from training providers but VicRoads would provide the collateral. Rating: 2 Cost: \$15k
4.2	Provide training organisations with statistical data on exposure, risk and injury to pass on to trainees.	VicRoads to liaise with Liz de Rome to develop appropriate information.	High	A relatively easy tactic to implement. Rating: 3 Cost: To be determined
4.3	Provide training organisations with a copy of Liz de Rome's <i>Good Gear Guide</i> . (Due for final approval in June 2009)	VicRoads to liaise with Liz de Rome regarding the purchase of a number of the guides.	High	VicRoads could buy copies of the guide in bulk that would then be discounted to training providers. Rating: 3 Cost: \$10k
4.4	Forge partnerships with protective clothing manufacturers to demonstrate benefits during training courses.	While some training providers already do this eg. HART, VicRoads could initiate this as standard practice. VicRoads to talk to all training providers.	High	The working group could implement this tactic across all training providers. Rating: 2 Cost: To be determined
4.5	Create a protective clothing checklist for training organisations to provide to new riders.	A simple but potentially effective tactic that VicRoads could implement cost effectively and quickly. VicRoads to discuss with all training providers.	High	Easy to implement and could be very effective. Rating: 3 Cost: \$2k
4.6	Create a list of approved protective clothing suppliers. However, caution around VicRoads endorsing protective clothing suppliers.		Medium	Due to potential legal issues this may not be so straightforward.



Audience	Tactic	Next Steps/Responsibility	Priority Level	Feasibility/Cost/Timing
5. Retailers and salespeople <i>"Shop owners have influence on your purchasing, as do those who have been directly involved in an accident. VicRoads should skill up the retailers and include visuals and statistics at this level. There is a myth that "you" will never have an accident and this should be overcome in key messages."</i> - scooter rider				
5.1	Create a retailer code of conduct for promoting and selling protective clothing.	To be discussed with key stakeholders.	High	Currie suggests this forms part of the overall code of conduct developed by the working group. Rating: 3 Cost: To be determined
5.2	Section added to all retailers' websites where the TAC <i>SkinCare</i> brochure and <i>Good Gear Guide</i> could be located. Additionally the quiz could be offered to retailers.	VicRoads to approach retailers with the suggestion and offer of collateral.	Medium	This would require retailers to elevate the importance of clothing for safety. Rating: 2 Cost: To be determined
5.3	Provide a copy of Liz de Rome's <i>Good Gear Guide</i> to all retailers.	VicRoads to liaise with Liz de Rome regarding the purchase of a number of the guides.	High	As per training providers
5.4	Create protective clothing specialist, through VACC, to train salespeople state-wide.	Retailers may feel their territory is being eroded however it would be worth exploring.	Medium	As some retailers already have presentations by clothing suppliers they may not see the need for this. Rating: 1 Cost: To be determined



Audience	Tactic	Next Steps/Responsibility	Priority Level	Feasibility/Cost/Timing
6. Melbourne City Council/Melbourne Businesses				
6.1	Target Melbourne City Council and larger Melbourne businesses to provide facilities to store protective clothing.	Consider possibility of VACC and FCAI taking up this initiative.	Low	This is a long-term initiative that would involve consultation with building developers. Rating: 1 Cost: To be determined



Appendices

A – List of stakeholders

B – Stakeholder questionnaire

C – Literature review

D – Interim report

E – Online survey analysis

F – Focus group key outcomes