



13 DECEMBER 06

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INDIANA BICYCLE COALITION

Submitted by

MARKETING INFORMATICS

PRE- AND POST-TEST FINDINGS



BACKGROUND:

The Indiana Bicycle Coalition (IBC) is responsible for promoting safe and enjoyable bicycling opportunities for the residents of Indiana, as well as educating the public on the rights and responsibilities of bicyclists and motorists alike. A promotional campaign called “Share the Road” has been developed to help further educate Indiana residents on these rights and responsibilities in order to help make Indiana more “bicycle safe” for all.

Prior to requesting funding for a statewide rollout of this campaign, the IBC contracted with Marketing Informatics (Mi) to conduct a pre-post awareness test of the campaign’s impact in Vigo County, where specific campaign spots were aired on local radio stations from mid-September through mid-October 2006. Mi conducted the pre-test prior to the spots airing and then conducted the post-test following completion of the ads. In total, just over 700 telephone surveys were completed as part of this evaluation.

The specific objectives of the research were:

- 1) to determine “Share the Road” awareness levels pre and post,
- 2) to establish benchmark levels of knowledge regarding specific bicyclist/motorist rights and responsibilities, and
- 3) to aid in justifying a rollout of the “Share the Road” campaign statewide.

The Indiana Bicycle Coalition partnered with Marketing Informatics to conduct pre- and post-campaign phone surveys among both riders and non-riders of non-motorized bicycles in Vigo County to achieve the objectives as referenced above. Survey findings are to be presented in conjunction with IBC’s request to roll out the “Share the Road” campaign statewide.

METHODOLOGY:

Survey data was collected by phone under the supervision of Marketing Informatics. The sample consisted of residents of Vigo County between the ages of 25 and 54.

The pre-campaign phone survey sample size was 360; the post-campaign phone survey sample size was 359.

Both samples were comprised of approximately 25 percent “riders”, individuals who had ridden a bicycle in the past three months, and 75 percent “non-riders”, individuals who had not ridden within the past three months. There was a nearly equal gender split among males and females in both samples, and the samples were mutually exclusive.

Marketing Informatics provided the following services:

- Questionnaire design
- Data collection
- Data hygiene, analysis and interpretation
- Final report presentation

EXECUTIVE SUMMARY:

“Share the Road” awareness improved from 17 percent pre-campaign to 22 percent post-campaign; nearly all of the awareness increase was observed among the non-rider segment.

Generally speaking, the survey findings indicate that there are no significant differences between riders and non-riders of bicycles in relation to the selected behaviors that were surveyed. However, there are significant differences between the two groups in terms of how the campaign impacted them if they remembered seeing or hearing “Share the Road.”

- 1) Riders were more likely to have been influenced regarding campaign specifics or to say that they learned nothing new.
- 2) Non-riders were more likely to have remembered campaign generalities as opposed to specifics.

Survey respondents, both riders and non-riders alike, indicate a fairly high general awareness of bicycle and motorized vehicle rights and responsibilities.

The media channel with the largest increase in pre- to post- “Share the Road” ad recall is radio. Furthermore, WTHI listeners are more likely to have heard the “Share the Road” campaign than those who listen to other stations.

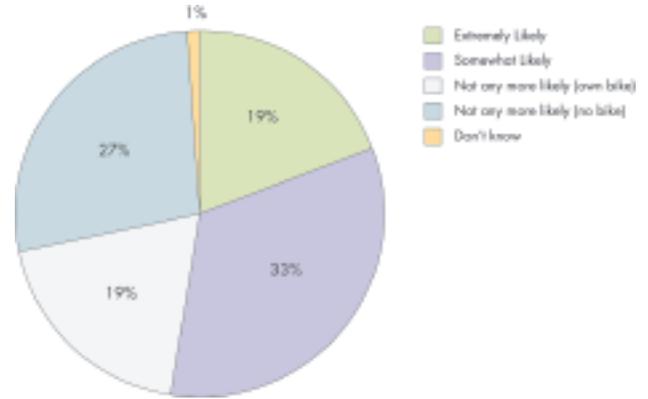
Areas most in need of further education and awareness are:

- 1) The use of helmets
- 2) The proper use of headlights/taillights when riding at night
- 3) The use of hand signals before making a turn
- 4) When bicycling, following the same rules that you would while driving any other vehicle
- 5) When driving, yielding to approaching bicyclists.

Significant findings

Key Findings on Selected Questions:

When asked in Q02*, 52 percent of all respondents surveyed say that they would be extremely likely or somewhat likely to ride their bike more often (or to begin bicycling) if there were roads near their home that made it more comfortable for them to ride.



In Q02b*, when asked if there was anything else that would encourage them to do so, the largest percentage, 28 percent, said that nothing would encourage them to bicycle more often or to begin bicycling. However, 26 percent cited a safe place to ride as an incentive, while another nine percent cited either a convenient location to ride or having access to a bike as an incentive to begin bicycling or to ride more often.

* These questions were asked only in the post-test.

The following are graphic representations of selected questions related to bicyclist and motorized vehicle driver rights, responsibilities and actions. Two areas where post-campaign results showed the most improvement include:

- 1) Riding on the right side with the flow of traffic (73 percent pre to 78 percent post)
- 2) Using hand signals before making a turn (44 percent pre to 52 percent post)

Q05 - Q11

When riding a bicycle, do you...	PRE-TEST	POST-TEST
...ride on the right side, with the flow of traffic?		
YES	73%	78%
NO	23%	19%
...wear a helmet?		
YES	20%	21%
NO	80%	79%
...use headlights and taillights when riding at night?		
YES	16%	15%
NO	16%	7%
DON'T RIDE AT NIGHT	67%	77%
...stop at stop signs and red lights?		
YES	90%	90%
NO	9%	8%
...use hand signals before making a turn?		
YES	44%	52%
NO	55%	44%
...ride on sidewalks when they are available?		
YES	62%	65%
NO	37%	34%
...try to follow the same rules that you would while driving any other vehicle?		
ALWAYS	63%	54%
USUALLY	27%	34%
SOMETIMES	5%	8%

Q12 - Q17

When you drive, do you...	PRE-TEST	POST-TEST
...reduce your speed approaching a bicycle?		
YES	96%	96%
NO	2%	2%
...allow three feet of passing space when passing a bicycle?		
YES	96%	97%
NO	2%	0%
...willingly share the road with bicyclists?		
YES	92%	93%
NO	5%	5%
...when preparing to make a turn, would you say that you yield to approaching bicyclists?		
ALWAYS	73%	73%
USUALLY	18%	18%
SOMETIMES	5%	5%
...generally honk at bicyclists when you approach them?		
YES	8%	6%
NO	90%	91%
...when preparing to enter or exit your car, do you look for bicyclists before you open your car door?		
YES	47%	46%
NO	52%	52%

THE FOLLOWING ARE FINDINGS WHERE THE “SHARE THE ROAD” CAMPAIGN POSITIVELY INFLUENCED BEHAVIORS:

... AMONG RIDERS

The “Share the Road” campaign has positively impacted these behaviors among those who have ridden in the past three months		
	PRE-TEST	POST-TEST
Ride with the flow of traffic	76%	80%
Wear a helmet	23%	26%
Stop at stop signs and red lights	92%	94%
Use hand signals before turning	40%	57%
When driving, generally honk at bicyclists when approaching them	11%	5%

The “Share the Road” campaign was effective in educating and increasing awareness among these behaviors of riders/drivers.

... AMONG NON-RIDERS

The “Share the Road” campaign has positively impacted these behaviors among those who have NOT ridden in the past three months		
	PRE-TEST	POST-TEST
Ride with the flow of traffic	70%	76%
Use hand signals before turning	47%	49%
When driving reduce speed when approaching bicyclists	95%	96%
Allow three feet of passing space	95%	97%
When driving are willing to share the road	90%	93%
Yield to approaching bicyclists	71%	72%
Ride on available sidewalks	67%	64%

The “Share the Road” campaign was effective in educating and increasing awareness among these behaviors of non-riders/drivers.

In general, the “Share the Road” campaign appears to have moved public opinion, although slight in some cases, in the intended manner.

THE FOLLOWING ARE FINDINGS WHERE THE “SHARE THE ROAD” CAMPAIGN DID NOT POSITIVELY IMPACT SPECIFIC BEHAVIORS:

... AMONG RIDERS

The “Share the Road” campaign did not positively impact these behaviors among respondents who have ridden in the past three months		
	PRE-TEST	POST-TEST
Use headlights/taillights when riding at night *	14%	12%
Try to follow the same rules that you would while driving any other vehicle	89%	87%
When driving, yield to approaching bicyclists	80%	77%
Ride on available sidewalks	56%	67%
* Note: The majority said they do not ride at night.		

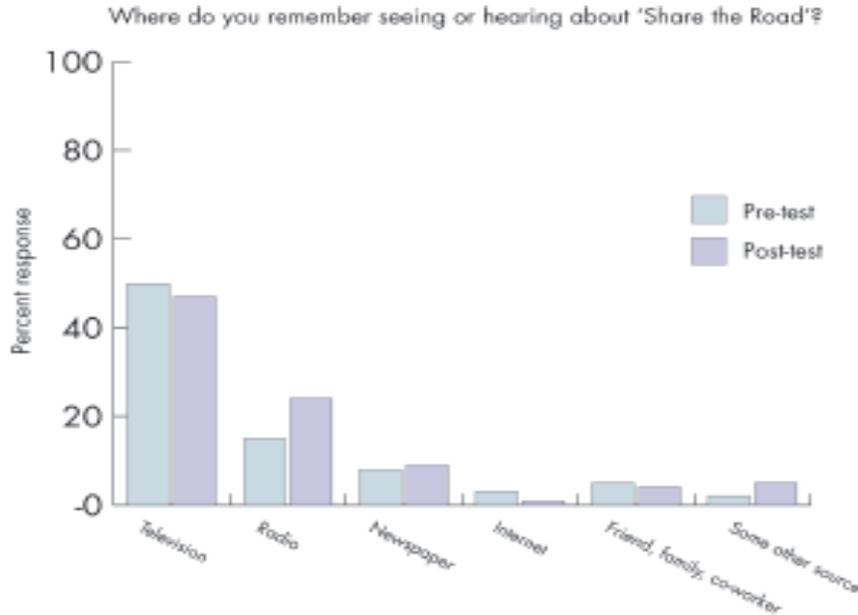
The “Share the Road” campaign was not as effective in educating and increasing awareness among these behaviors of riders/drivers.

... AMONG NON-RIDERS

The “Share the Road” campaign did not positively impact these behaviors among those who have NOT ridden in the past three months		
	PRE-TEST	POST-TEST
Use headlights/taillights when riding at night *	20%	16%
Try to follow the same rules that you would while driving any other vehicle	90%	87%
* Note: The majority said they do not ride at night.		

The “Share the Road” campaign was not as effective in educating and increasing awareness among these behaviors of non-riders/drivers.

The majority of those who say they remember seeing or hearing something about “Share the Road” cite television and radio as their sources. However, of significance, radio campaign awareness increased from 15 percent in the pre-test to 24 percent in the post-test.



Importantly, the results of Q20 suggest that residents of Vigo County remembered the “Share the Road” campaign, as indicated by an increase in general campaign awareness from 55 to 64 percent. However, the content and message of the campaign needs to be maintained for a sustained period of time in order to generate greater memory of specific campaign details.

Which of the following statements best reflects what you remember about the 'Share the Road' campaign?						
	Pre-Test			Post-Test		
	Riders	Non-Riders	OVERALL	Riders	Non-Riders	OVERALL
Remember the campaign in general, but not any specifics	65%	51%	55%	39%	72%	64%
Learned about bicyclist and motorist rights and responsibilities	0%	16%	12%	17%	12%	13%
Already knew about bicyclist and motorist rights and responsibilities, so didn't learn anything new	35%	33%	33%	44%	16%	23%

Among those stations tested, the station with the highest listenership among respondents is WTHI (HI-99 or 99.9 FM), followed by WWVR (The River or 105.5) and WMGI (100.7 FM).

Please indicate whether or not you listen to any of the following radio stations:	PRE-TEST	POST-TEST
WMGI (100.7 FM)		
YES	38%	39%
NO	62%	61%
WTHI (HI-99 or 99.9 FM)		
YES	54%	60%
NO	46%	39%
WWVR (The River or 105.5)		
YES	45%	45%
NO	55%	54%

Radio Listenership				
DAY PART	PRE-TEST		POST-TEST	
	Riders	Non-Riders	Riders	Non-riders
6 - 10 am	86%	77%	73%	71%
10 am - 2 pm	38%	42%	33%	46%
2 - 6 pm	71%	62%	57%	62%
6 pm - Midnight	36%	26%	35%	25%
Midnight - 6 am	12%	8%	9%	7%

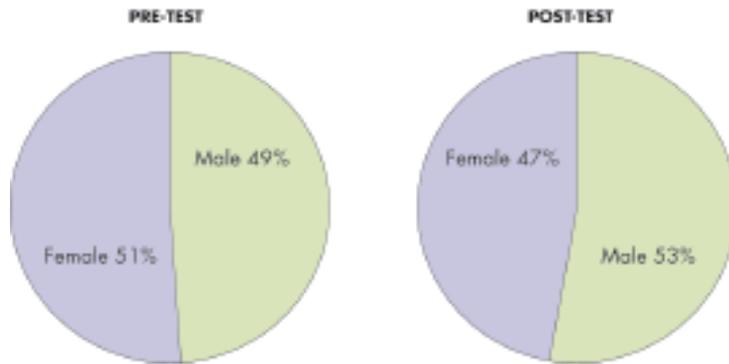
The most popular time of day for all respondents to listen to the radio is from 6 - 10 a.m.

Demographically, nearly two-thirds of individuals surveyed have no children currently living in their household, and, as mentioned earlier, the two samples were split nearly equally across gender.

PRESENCE OF CHILDREN

How many children under the age of 18 currently live in your household?	PRE-TEST	POST-TEST
None	62%	63%
One	13%	18%
Two	12%	12%
Three	8%	5%
Four or more	4%	3%

GENDER OF RESPONDENTS (BY OBSERVATION)



CONCLUSIONS:

- 1) There appears to be broad-based awareness and familiarity with many of the rights and responsibilities of bicyclists and drivers.
- 2) Generally speaking, riders and non-riders alike share similar levels of awareness regarding these rights and responsibilities.
- 3) The public is more likely to ride more often, or to begin bicycling, if there are roads near their home that make it more comfortable to ride; other incentives to increasing ridership include safe riding locations, convenient riding locations and access to a bike.
- 4) “Share the Road” campaign awareness appears to have been positively influenced as a result of the radio spots aired from mid-September to mid-October.
- 5) In terms of ad content recall, riders are more likely to have been influenced by campaign specifics, while non-riders are more likely to have been influenced by campaign generalities.

RECOMMENDATIONS:

- 1) Based on the increase in campaign awareness pre to post, we recommend a statewide rollout of the campaign *over a sustained period of time*. We anticipate that doing so would positively impact not only general awareness, but also specifics linked to bicyclist/motorist rights and responsibilities.
- 2) Utilize survey results to influence legislators and funders regarding the need for improved bicycle roadways and pathways as a means of encouraging more riding. If you haven’t already done so, consider tying increased ridership into the Governor’s call-to-action for a more physically fit Indiana.
- 3) In those locations where appropriate roadways and pathways currently exist, consider working with qualified providers to establish rental facilities so as to encourage ridership among those who don’t own a bike but who would otherwise enjoy riding.
- 4) Ensure that the content of the advertising focuses on current deficiencies regarding desired behaviors, i.e. the wearing of helmets, the use of headlights/taillights while riding at night and the use of proper hand signals when readying to make a turn.

APPENDIX

AMONG SPECIFIC GROUPS, THE FOLLOWING OBSERVATIONS MAY BE MADE:

Households with children are more likely:

- 1) to have ridden a bike within the last three months
- 2) to bike more often or begin bicycling if there were roads near their home that made it more convenient and comfortable for them to ride
- 3) to wear a helmet
- 4) to yield to approaching cyclists when driving a motor vehicle
- 5) to have seen or heard "Share the Road"

Households with higher incomes are more likely:

- 1) to bike more often or begin bicycling if there were roads near their home that made it more convenient and comfortable for them to ride
- 2) to feel that cyclists have the same rights as motorists
- 3) to ride with the flow of traffic
- 4) to wear a helmet
- 5) to have seen or heard of "Share the Road"
- 6) to have seen or heard "Share the Road" on the radio
- 7) to listen to the radio between 6:00 and 10:00 a.m.

Households with lower incomes are more likely:

- 1) to listen to the radio between 6:00 p.m. and 12:00 midnight
- 2) to listen to WTHI
- 3) to have seen or heard "Share the Road" on television
- 4) to use hand signals on a bicycle before making a turn
- 5) to ride on sidewalks

Males are more likely:

- 1) to report that they already knew about bicyclist and motorist rights and responsibilities, so they really didn't learn anything new from "Share the Road"
- 2) to listen to WWVR
- 3) to listen to the radio from 6:00 to 10:00 a.m.

Females are more likely:

- 1) to report that they remember the campaign in general, but not any specifics about it
- 2) to have never ridden a bicycle