



## Connecting with young drivers

How can road safety professionals  
communicate successfully with young people?

September 2007

# Foreword

Connecting with young people to remind them of the risks and dangers they face on the roads; persuading young drivers and their passengers to drive and behave in a fashion likely to minimise these risks; and ultimately, playing a part in reducing crashes and casualties among this highly vulnerable group of road users.

These are among the toughest challenges faced by Britain's road safety professionals.

This study has been carried out to help them achieve these objectives. It looks at how young people view their safety on the roads, and identifies what they perceive to be the greatest dangers they face while travelling by car.

Perhaps even more usefully for road safety officers, the study tested a series of advertising concepts that could form the basis of a publicity campaign specifically targeting this age group. This report explains the thinking behind the concepts - and identifies what worked, and what didn't.

The research was carried out by a research company and the concepts produced by a communications agency. Both companies have extensive road safety experience, and in particular experience with young drivers and passengers.

By taking this approach, we think we have produced actionable research - a study that road safety professionals can use when developing campaigns and resources for use on the ground at local or regional level.

Finally, LARSOA is indebted to BSM, its commercial partner on this project, who provided full funding for the study. By doing so BSM has underlined its commitment to saving young lives - without their financial support the study would not have taken place.

**Malcolm Burns**  
**Chairperson**  
**LARSOA**

# Contents

<b>EXECUTIVE SUMMARY</b>	3
<b>INTRODUCTION</b>	5
<b>STAGES 1 &amp; 2 - KEY FINDINGS</b>	6
<b>STAGE 3 - THE FINAL CONCEPTS</b>	12
<b>CONCLUSIONS &amp; RECOMMENDATIONS</b>	26
<b>APPENDIX</b>	28

Research Agency: QRS Market Research Ltd.  
Contact: Lee Tomlin, Research Director  
Tel: +44 (0)1992 500355  
Email: lee.tomlin@qrs-research.co.uk

Concepts: Stennik  
Contact: Nick Rawlings  
Tel: +44 (0)1379 650112  
Email: nrawlings@stennik.com

Note: All images are comping images and have been used for testing purposes only,

# 1.0 Executive Summary

## Background

The research was undertaken in three stages. First, an exploratory stage of focus groups to identify attitudes and issues relevant to 17-20 year old drivers. Next, a quantitative stage to explore and quantify stage one findings and test some initial creative concepts. And finally, further focus groups to test refined and modified concepts to establish what worked, and what didn't.

The research was carried out in the period April-August 2007.

## Key issues identified

- Young drivers find the prospect of *dying less frightening than being left brain damaged* and requiring 24/7 care.
- *They are also more worried about seriously injuring or killing a passenger than hurting themselves.* That's why a majority of the concepts produced for testing focused on a passenger being seriously injured.
- Although young drivers acknowledge speed as a major contributory factor in many crashes, they also felt that inattention is often just as important. *Over half of respondents in the hall tests stated that paying more attention to the road was the main way they could reduce their personal risk of having an accident.* With the number of 'in-car gadgets' such as iPods, Sat-Nav and mobile phones on the increase - and the distraction of passengers and 'people watching' - many young people are not giving driving the level of attention it requires.
- *Risk taking is perceived as a normal part of driving* for this age group and the potential consequences are rarely considered. The level of risk appears to escalate when driving in convoy with friends and when carrying passengers. 59% said they are more likely to take a risk when driving in convoy with friends, and 26% said their mates egg them on to drive more quickly or to take a risk. This is evident in both sexes - comments suggest that it is no longer predominantly a male trait.

- There is considerable evidence indicating that the *drink drive message is failing with 17-20 year olds.* Driving the next morning while over the drink drive limit is widespread (52% admitted to this at stage 2) and does not have the same social stigma as driving straight after a drink. This issue needs further attention/investigation in the future.
- There is a *natural tendency for young drivers to look for an excuse* - a reason why a situation could not happen to them. When thinking about an accident scenario multiple factors nearly always come into play - for example road conditions or the behaviour of other drivers. With this target audience, a successful campaign must reduce the chance of the reader thinking: 'That could never happen to me', or 'That was not my fault'.

## The concepts

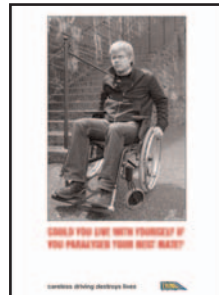
Developing road safety messages targeting the 17-20 year old age group is particularly problematic.

It's not that people in this age group don't care about the issues, but they find it difficult to imagine their own mortality. They are young and their life experiences are such that many will not have been personally affected by accidents. A successful campaign must induce a sense of responsibility for what has happened - make it impossible for them to absolve themselves of responsibility for the outcome.

These concepts that were tested are summarised in this executive summary, and examined and explained fully further on in this report. *Readers are recommended to read the fuller explanation to gain a more comprehensive understanding of the thinking behind them, and reaction to them.*



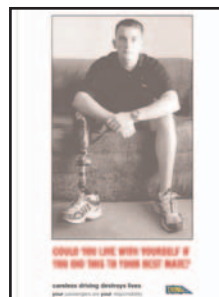
**Carefree, Careless, Cared for**  
 The idea behind this concept was well received but the execution failed to grab attention - principally because the visuals are not clear enough. The idea that young drivers are carefree and often careless was felt to be appropriate and effective.



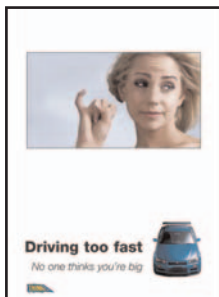
**Could you live with yourself if you paralysed your best mate?**  
 This concept did not perform well. The image was considered unremarkable and the model is too old.



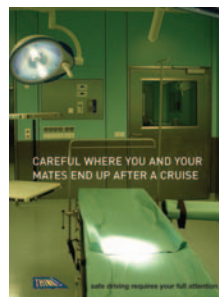
**Bet you wish you hadn't put your f\*\*\*ing foot down now?**  
 The imagery is not sufficiently thought provoking. Respondents felt that an image of someone in a wheelchair not being able to play sport or go clubbing would be more distressing and effective.



**Could you live with yourself if you did this to your best mate?**  
 This concept performed well. The image of a young man with a false leg drew respondents in because it is unusual. Asking the reader a question was also effective as it puts the reader in the driver's position.



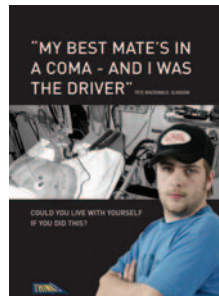
**Driving too fast - no one thinks you're big**  
 This concept did not perform well. It was felt to be too tongue in cheek to be taken seriously. Indeed, there is a danger that the concept could have the opposite effect to that desired.



**Careful where you and your mates end up after a cruise**  
 Although the concept performed reasonably well the visual was not sufficiently thought provoking. Respondents were able to imagine too many scenarios under which it was not the driver's fault that the crash occurred.



**More girls die as passengers than as drivers**  
 Many respondents were confused by this message. Some justified the headline by suggesting that more girls die as passengers simply because more young females travel as passengers than as drivers.



**My best mate's in a coma - and I was the driver**  
 This concept performed extremely well. The visual of the passenger in hospital was very emotive. However, the model used as the driver is not suitable because he was perceived as insincere. Asking the question 'Could you live with yourself?' was an effective way to make the reader think about his or her own actions.

# 2.0 Introduction

## 2.1 Background

QRS Market Research was commissioned by LARSOA and BSM to undertake exploratory research into the attitudes of young drivers (17-20 years), and to test a series of creative concepts. The aims of the research are: to provide a greater understanding of young drivers' attitudes towards driving and road safety; to provide a 'toolkit' of concepts to help road safety professionals in their work with young people; and to provide the basis for an advertising campaign targeting young people.

The following report is a detailed description of the key findings from the three stages of research that took place between April and August 2007.

## 2.2 Objectives

The main objectives of this study were:

- To establish young drivers' attitudes towards driving in general;
- To explore young drivers' perceptions towards the risks associated with driving;
- To better understand 'triggers' that may lead to changes in young drivers' behaviour;
- To ascertain their perception of risk when carrying passengers;
- To explore what media and communications might be most effective;
- To test advertising concepts developed as a result of initial findings.

## 2.3 Methodology

A multi-method approach was adopted and executed in three stages. All UK government regions were included in the research with the exception of Northern Ireland.

Stage 1 comprised four focus groups with seven or eight young drivers in each group (a total of 31 in all four groups). Stage 2 comprised four hall tests during which 130 respondents were interviewed. Stage 3 comprised a further four focus groups with between six and eight respondents in each group (a total of 29 in all four groups).

All respondents were aged 17-20 years, had passed their driving test and owned their own car.

For more detailed information about the methodology used in this study please refer to Appendix 1.

## 3.0 Stages 1 & 2 - Key Findings

More detailed results for stages 1 and 2 are available from the project managers. A summary of the key findings from stages 1 and 2 follows.

### 3.1 Car ownership and driving

Owning a car is very emotive for young drivers. The key attributes respondents associated with car ownership are:

- Independence
- Freedom
- Convenience
- Growing up/becoming an adult
- Having status
- Personal space
- Bonding with friends
- Excitement - driving fast/recklessly can be a thrill

Respondents said that car ownership gives them the ability to 'escape'. Many young drivers are living at home and their car becomes their personal space - a place they control (e.g. they can play their music as loud as they want). Their car also becomes an important part of their social life. It's a place where they can play music and spend time bonding with their passengers (normally friends or siblings), which means it's a fun place to be.

*"It's like my bedroom" (Harlow)*

*"...like with your girls, the three of you are going out, singing along down the road" (Bexley Heath)*

For many owning a car has become an intrinsic part of their daily lives - many take car ownership for granted. The consequences of not being able to drive would be severe.

*"Mine means everything to me, because for example I wouldn't be able to do the job I'm doing if I couldn't drive, without a doubt. Again going out all the time, I would never go out ...; I've just become so lazy since I've got a car. I can't imagine not having a car now, I've had a car for so*

*long, if my car was taken away from me, I wouldn't know what to do" (Stockport)*

People in this age group gain a sense of power and authority from driving. Not only can they go where they want when they want, they are also responsible for something that has the ability to harm people, and allows them to break the law. Although there are young drivers who respond to this responsibility in a positive way, there are also those who show concerning signs of behaviour.

*"I think it's the sense of authority, you know like doing something that you're not supposed to be doing, but knowing that you're going to get away with it" (Stockport)*

There are, as we would expect, the 'thrill seekers'. This group invariably displays dangerous driving habits and enjoys the adrenalin rush of near misses, or even having a crash. This group is clearly going to be the most difficult to reach in any campaign.

*"Having a crash is exciting, it gets the adrenalin going" (Harlow)*

Young drivers often view driving as a way of proving themselves and their abilities. They believe that driving is a challenge and driving fast or taking risks is an important way to prove to themselves and their peer group that they are a good driver. Although it was more evident among males there were also females across the groups who displayed this behaviour.

*"...the reason I enjoy driving fast, it's a challenge, it's not breaking the rules, going oh, I'm breaking the rules, I enjoy the challenge of driving fast" (Stockport)*

*"I know some people can't go round corners, they can't control the car as well as I can and that gives me a buzz that I'm good at it. I don't mean to be arrogant, but I know some people can't, so it gives me a buzz that I can...."*

## Key findings - stages 1 and 2

*because my car's not a fast car, but I know I can drive it pretty much at its limit. I've had it for as long as I've ever driven, so I know my car inside out" (Stockport)*

Often this 'proving yourself' mentality goes further and becomes competitive within the peer group. This is when some young drivers are likely to take most risks.

*"It's getting one over on your mates you overtake them and they overtake you. It's a laugh - something to talk about at the end of the night" (Harlow)*

*"You've got one over on them (friends)" (Bexley Heath)*

### 3.2 What might change behaviour?

The main concerns identified by participants were:

- Killing a family member or close friend
- Causing brain damage or paralysis to a family member or close friend
- Killing themselves - the effects it may have on their family
- Having brain damage or paralysis and the effects it may have on the family i.e. 24/7 care
- Killing/maiming a child passenger - especially if it's a much younger sibling
- Killing or injuring someone who has done nothing wrong e.g. in another car
- Killing/injuring a pedestrian (particularly if its is a child)
- Getting points/losing license

The majority of respondents found it difficult to imagine their own mortality. However, the effects that brain damage or paralysis would have on either their family or the family of a passenger is particularly emotive. Having the constant reminder of a family member or friend who has survived but requires 24/7 care would produce a strong sense of guilt.

*"I know it might sound wrong, but like killing someone,*

*they're gone at the end of the day. You could see that person tomorrow if you give them brain damage. I suppose seeing that person I'd be, like, I did that to them" (Bexley Heath)*

The comparison between causing brain damage and paralysis will need to be tested further at stage 2 (as will death versus brain damage or paralysis). It would appear that, for young people, living with the thought that you had paralysed or given someone brain damage is more troublesome than killing someone. Conversely, for some the thought of being in a wheel chair is particularly poignant.

*"I know if I was paralysed I'd want to die, because you're obviously not used to it, are you?" (Stockport)*

### 3.3 What are the greatest risks?

Respondents identified lack of attention as a key contributory factor likely to result in a crash (often based on their own experiences). The following reasons were cited as likely to result in lack of attention:-

- Changing a CD
- Having people in the car and being distracted by them (talking, 'having a laugh')
- People watching - 'looking at the talent'
- Talking on a mobile phone
- Text messaging (reading a text, and in some instances writing one...)
- Drinking/eating while driving
- Reading a map
- Day dreaming

Driving on 'auto pilot' was very common across the groups and was cited as the main reason for a lot of crashes.

*"I just wasn't concentrating, I was just thinking about everything else I had to do and somebody slammed the brakes on" (Bexley Heath)*

## Key findings - stages 1 and 2

*"I lose concentration, that's why I crashed three times"  
(Stockport)*

Driving while tired was perceived as a very real risk by some respondents. This was either associated with driving home after a late night out (going to bars or clubs) or with getting up early for work.

*"Well, just driving home from the pub or whatever and you can just feel your eyes closing..." (Bexley Heath)*

Driving fast is widespread and not necessarily perceived as bad driving. Indeed, some see driving fast as socially acceptable as long as the driver is in control of the car, and if the conditions allow. It is clear that speed limits are held in little regard by young drivers.

*"I think I'm a good driver, I just speed. I always seem to do 10 miles above the speed limit" (Yate)*

*"To me, the speed limit bears not too much relation to how fast I go. It's what I consider safe, so it's like when you break that barrier of what's dangerous. Sometimes on the motorway it's 60, because it's icy or it's pissing it down and you can't see 20 yards in front of you, but sometimes you can do 100 on a motorway, 120 and it's safe because there's no-one else there" (Stockport)*

Driving aggressively was often seen as necessary part of life. This was particularly evident in Bexley Heath and Stockport.

*"I don't necessarily speed, I just rule the road when I'm on the road. I rule it - you've got to, if you don't you just get taken over, don't you?" (Bexley Heath)*

Risk taking is perceived as a normal part of driving - the consequences are rarely considered. Indeed, there was 'bravado' among some respondents about the risks they had taken and got away with. Risk taking is perceived to be

part of the process of gaining experience.

Risk taking appears to be more widespread when driving in convoy with friends. This is not exclusively a male trait - there were females in the groups who also admitted to this.

*"You're all competing, though, aren't you? You're all competing all the time, cutting in front of each other, and it does get close. It does get stupid at times, but you don't want to give up, do you? You get called a wally when you get to the place, so you're going to try and push it as much as you can" (Bexley Heath)*

Many young drivers openly admit to using a mobile phone while driving. Moreover, reading and writing text messages appears to be quite normal. Indeed, this is often perceived as safer than taking a phone call.

*"I can just text with this hand down here, I don't even have to look at my phone to text and then at the end I just have a quick glance to make sure I've not spelt anything wrong and send it" (Stockport)*

*"The police can't see you texting" (Harlow)*

It is concerning that the drink-driving message does not appear to be getting through to some young drivers. Although only a small number admitted to driving immediately after consuming more than the legal limit, considerably more admitted to driving the morning after and knowing they were still over the legal limit.

It is even more worrying that this is not perceived as particularly wrong. Indeed, if they got caught they would feel unlucky and hard done by. It appears that having a sleep - in effect starting a new day - makes it more acceptable. Indeed, those who find themselves driving the morning after when they know they are over the limit feel they have little choice but to do so as they are likely to need to get to work. This age group often live their life day to day

## Key findings - stages 1 and 2

- the consequences of today's actions for their life tomorrow are not at the forefront of their minds.

Some respondents in Harlow and Stockport admitted to driving while under the influence of drugs.

*"Cannabis is OK to drive on after it has worn off" (Harlow)*

Many young drivers own older cars and mechanical defects are seen to be a very real hazard. As most have limited income, many drive a car that they know has mechanical defects that they cannot afford to get fixed.

Above all, young drivers will often have what they perceive to be a valid excuse why they have a crash. They often cite circumstances that they believe are beyond their control such as the weather or the actions of other drivers. At stage 2, 61% of respondents agreed with the statement: 'There are nearly always other circumstances that lead to a crash other than just bad driving'.

*"I've come off the A2 at the Warmington turn-off and the sun was in my eyes and I was looking to see if I could see if anyone was coming round and I just went into the back of someone" (Bexley Heath)*

### 3.4 The most likely reasons for a serious crash

Lack of attention	45%
Driving aggressively	28%
Going too fast	22%
Exceeding the speed limit	4%
Driving too close	2%

### 3.5 The most likely reasons for a minor accident

	TOTAL (n=130)
Driving too close	60%
Lack of attention	28%
Driving aggressively	5%
Exceeding the speed limit	4%
Going too fast	3%

### 3.6 Passengers

Having passengers in the car can affect behaviour in one of two ways.

Some young drivers say they feel a greater sense of responsibility when carrying family or friends as passengers. This group invariably pay more attention and drive more slowly when carrying passengers. Conversely there are those who like to 'show off' to their passengers, or find that their attention is drawn away from driving.

*"Most people crash at our age through entertaining people in the car...you don't see very many people our age have a car accident with just themselves in the car, it's always with somebody else, because they're trying to entertain them; look, my car goes this fast. Let's put this CD on, look at my sound system, I've got this, look how fast I can go round a corner" (Yate)*

*"We've been out before and people are chatting. You're trying to listen to the conversation and you're not concentrating, and loud music as well" (Stockport)*

It is concerning that many passengers encourage the driver to drive fast and take risks. 26% of respondents at stage 2 agreed with the statement: 'Sometimes my mates egg me on to drive more quickly or to take a risk'.

## Key findings - stages 1 and 2

However, some drivers are not trusted in these circumstances and pressure is put on them to slow down. It appears that young drivers will often trust their own ability - but not that of others in their peer group.

There are also those who 'day dream' more when they are on their own in the car.

*"To be honest I'm always more careful when there's other people in the car. If I'm on my own, then usually I distract myself, like by changing the CD or song, looking at something, so I haven't got someone there next to me. So if I've got someone there next to me and they're talking to me, I can just look at the road and I don't need to take it, but my attention isn't anywhere else. But if I'm on my own, then I'm less worried about anyone, because there's no-one else in the car, so it's just me and I think I do distract myself more, when I'm on my own"* (Bexley Heath)

There were comments indicating that young drivers will often take considerable risks with their passengers by carrying people in the boot of the car, rather than doing two trips or making their friends pay for a cab.

### 3.7 Safety

Young drivers believe that addressing the problem of lack of attention is an important factor in reducing the number of accidents among their age group.

Driving too fast is also seen to be an area requiring attention - although young drivers will often not see this as the only contributing factors to an accident. There is often something that is also beyond their control such as the weather conditions or being distracted. In their view improving safety does not depend on sticking to the speed limits.

*"The emphasis shouldn't just be on speeding because speeding's not the only thing that's dangerous... Speeding and not paying attention"* (Stockport)

Respondents felt that gaining experience and learning what the car is capable of are important features of driving safely. They also felt that it's important to admit to one's own abilities.

*"I know I like to think I'm a good driver but I'm actually a crap driver because I'm not experienced enough. So there is no point getting a decent car when I'm likely to have an accident"* (Harlow)

Participants were asked:- If you wanted to reduce your personal risk of having a serious accident, which ONE of the following would you try to do?

	TOTAL (n=130)	MALE (n=63)	FEMALE (n=67)
Pay more attention	57%	51%	63%
Drive more slowly	32%	33%	30%
Drive less aggressively	7%	8%	6%
Never drive too close	5%	8%	1%

### 3.8 How can we change behaviour?

Real life experiences are most likely to trigger a change in behaviour.

Self-correction is most likely through one's own experiences or through people you know. Learning by the mistakes of someone who is unknown is likely to be less effective - particularly if it is someone they cannot relate to - for example someone of a different age, or from a different sector of society.

It is also evident that many in this age group can quickly forget negative experiences. One female respondent in the Harlow group stated that she had been in a serious accident caused by a friend driving dangerously - but now gets in her car and races her friends.

## Key findings - stages 1 and 2

Young drivers felt that a case study featuring a person they can relate to who has caused serious and permanent injury is likely to be thought provoking - for example, hearing from someone their own age who has killed or maimed a close friend.

*"Maybe if they personalise it, it would help. Like if you see stats they're not personal, but if someone put a sign up and said Tom Jones died here aged 30, you'd be like, fuck, he got run over. That would make you think oh shit, someone died and he was aged 30, it would personalise it"* (Stockport)

Respondents felt that more needs to be done to make them think about the consequences of their every day actions. For example, changing a CD and taking your eyes off the road is just normal behaviour - young drivers do not perceive there to be any real risk in doing this as it's something everyone does.

*"I think it should be like, say someone does get run over, things like reaching for your CD. Little things that you do every day, you don't think it'll cause a hazard and it does and you kill someone"* (Stockport)

Respondents felt that having to face either their own family, or that of someone they had killed, would be difficult and particularly thought provoking.

Having points on their license is unlikely to have a major effect on behaviour - unless they have accumulated sufficient to lose their license the next time they are caught.

The use of statistics received a mixed response. Although there are respondents who think the use of statistics can be powerful, others feel they have little meaning.

The 'wallpaper' effect is very evident among the 17-20 year old age group. Indeed, even real life images can suffer from over exposure.

*"I drive through Wythenshawe and every single lamp post is covered in flowers, because everyone's either drunk driving and crashed into it or a pedestrian's died through speeding. [Mod: And how does that make you feel when you see that?] It just makes you think, oh no, another one dead at that lamp post and another one at that lamp post"* (Stockport).

### 3.9 What are the most worrying outcomes of a crash?

A conjoint exercise was used at stage 2 to determine the most concerning outcomes of a crash. The results were:

- Respondents feel that ending up with severe brain damage is more worrying than dying or being left paralysed.
- Killing a friend is more worrying than them having paralysis or brain damage.
- Killing or hurting a family member is more worrying than killing or seriously injuring a friend.

### 3.10 Respondents' self classification

At stage 2 respondents were asked to classify their own driving style and behaviour. The results were:

- 78% of males consider themselves to be 'confident' or 'very confident', compared to 55% of females.
- Overall 67% of the sample classified themselves as a fast driver (9% as very fast/fast).
- Only 2% of the sample said they drive slowly.
- 69% of respondents said they were 'very' or 'quite easily irritated' by other drivers.
- 39% of the overall sample said they were distracted 'very' or 'quite easily'.
- 52% of the sample admitted to driving the next morning while probably over the drink drive limit. This issue warrants further research.
- 45% said that they exceed the speed limit regularly or quite often.
- Changing a CD or being distracted by other passengers are the top two behaviours likely to take attention away from the road.

# Detailed Results

## 4.0 Stage 3 - The Final Concepts

The findings from stages one and two were used to develop eight concepts for testing in stage 3. Concepts were shown at random in each group and discussed in their own right before respondents were asked to make comparisons.

### Concept A - 'Carefree, Careless, Cared for'

This concept was introduced for the first time at stage 3. It uses a storyboard approach to show how the pleasure and freedom associated with driving can quickly turn into a nightmare. The young couple crash, with severe disability and lifelong dependency the ultimate outcome for the male driver. The concept closes with the strap line: 'Safe driving requires your full attention'.

Overall, the concept received a mixed reception - to be successful the execution would require further development. Although the thinking behind the concept was understood and well received, the execution failed to grab respondents' attention or fire their imagination.

*"I'd just flick past it (in a magazine) because there's nothing that would grab you" (Female, N. London)*

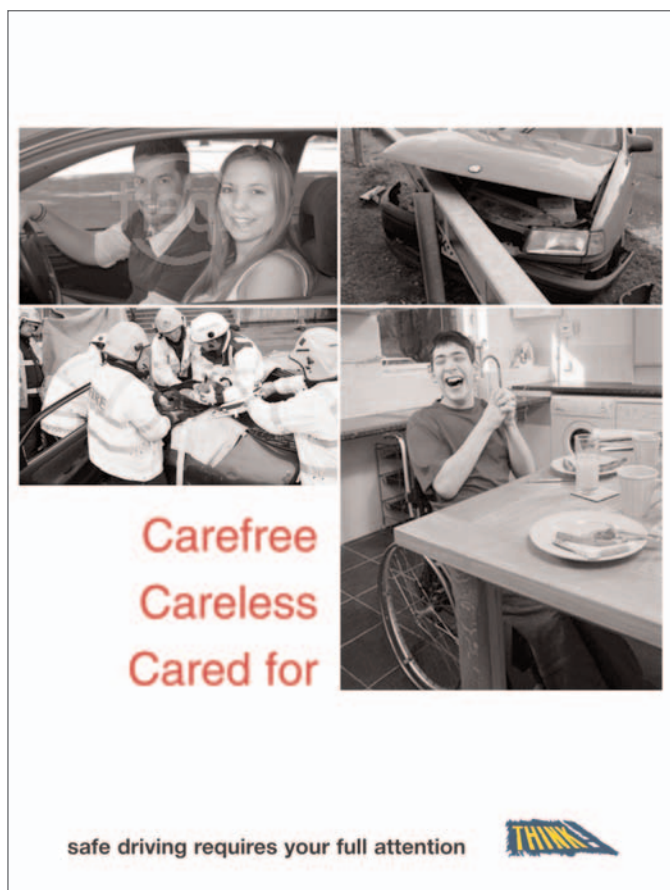
There were a number of positive comments about the storyboard approach. Respondents suggested featuring a real person before the accident, and a post accident picture showing how the crash had ruined their life. Respondents also suggested that the approach should go one step further and show people doing the sorts of things young people do, such as playing sport.

There was some initial confusion regarding the photos used and what they were meant to be portraying. The images do not depict the tragic events that unfold in a sufficiently strong manner.

*"I think the idea's good, so if you had like a real person that was maybe, that had been in a wheelchair or had brain damage or whatever and you had a picture of him before and then a picture of him after, so you could see the change in the person" (Male, Glasgow)*

Furthermore, the disabled person shown is deemed to be 'too happy' and as such the image fails to have the desired effect. In addition the language used was sometimes perceived as 'soft' and therefore invoked positive rather than negative feelings and emotions.

*"Cared for is quite a nice ending isn't it really? I'd like to be cared for" (Female, Leicester)*



## Detailed results - concepts

*“Cared for, it can seem quite positive, though as well, when it's supposed to be giving a negative message” (Female, N. London)*

*“The fact that he's laughing as well, I don't think that gets the point across at all. It feels like he's happy for it, which you wouldn't be would you?” (Male, Leicester)*

*“But he's having a good time, isn't he?” (Male, Glasgow)*

Respondents found the idea that young drivers are carefree and often careless particularly appropriate. It has the potential to be a relevant message to use - many could see these traits in themselves.

*“Young people are generally more carefree though because they haven't really got any responsibilities” (Male, Cwmbran)*

The concept raised questions about what happened to the passenger. She could have walked away without injury and therefore there was a happy outcome for her. What's more, respondents' feelings of guilt and sadness were diminished because the driver was the one that was hurt and it may well have been his own fault.

The 'safe driving requires your full attention' strap line was not perceived as being hard hitting enough. It was not sufficiently thought provoking and perceived to be 'too main stream'. It does not strike a chord with young drivers - they perceive it to be stating the obvious. However, if the concept had stronger visuals it is likely that the overall impact would improve.

*“Safe driving requires your full attention - it's a bit wishy washy....it's not something you've not heard or seen before” (Female, Leicester)*

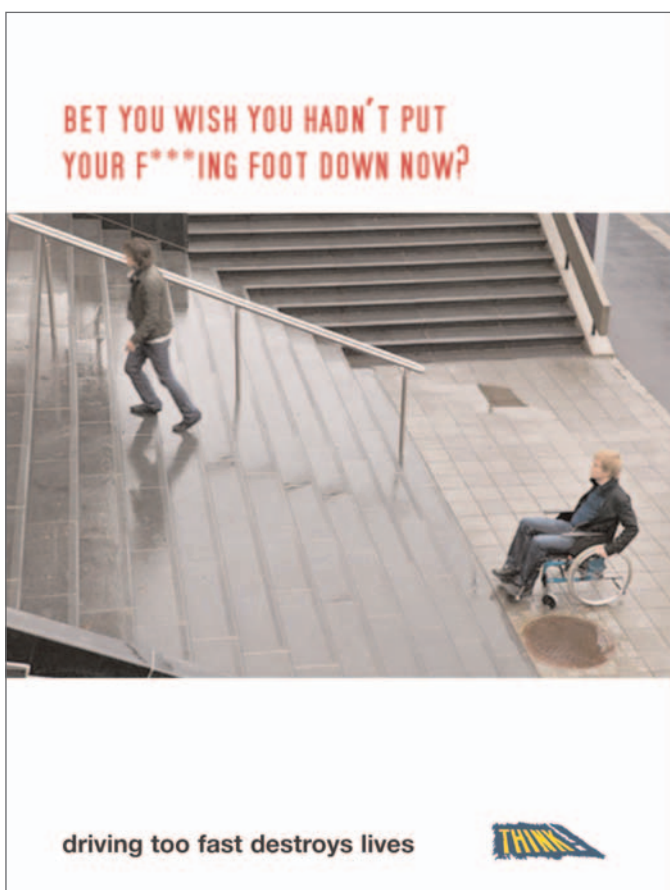
*“It's just a standard thing that you would expect to see on those types of adverts” (Female, Cwmbran)*

*“One bit says safe driving requires your full attention, but I don't think that sort of picture gets that message across, so that message, that doesn't work” (Male, N. London)*

### Concept B - 'Bet you wish you hadn't put your f\*\*\*ing foot down now?'

This concept attempts to use the kind of language that many young people would identify with. The image shows a young man in a wheelchair at the foot of a flight of stairs - he is unable to get up the stairs. It uses the strap line 'driving too fast destroys lives'.

This concept was tested at stages 2 and 3, though the image was changed for stage 3. At stage 2 its key strengths were 'being believable' and 'being relevant to young drivers'.



The imagery used in the concept does not strike a strong chord with young drivers, and the potential outcome of driving too fast needs a more relevant context. Respondents

felt that not being able to play sport or go clubbing is more distressing than not being able to walk up a flight of stairs.

*"I'd find that more as a comedy value as in the guy is trying to get up the stairs and he can't" (Male, Cwmbran)*

*"I'd change the picture, based at young lads, which it seems to be again, because its lads, I'd change the picture. Something like your mates playing football and then in the background you've got someone sat on the side in a wheelchair or something that's more related to young lads" (Male, Leicester)*

*"The image like isn't strong enough for the line that goes with it. They could put a far worse picture with the quote at the top and it would make more of a difference" (Female, Cwmbran)*

Some respondents felt that the message lacks the initial impact required to draw young people in.

*"I think it's too complicated, it doesn't get the message across straightaway" (Male, Glasgow)*

Thoughts about the words used were mixed. Whereas some young drivers felt they could relate to the words others said they felt that the advert was trying too hard to engage with them.

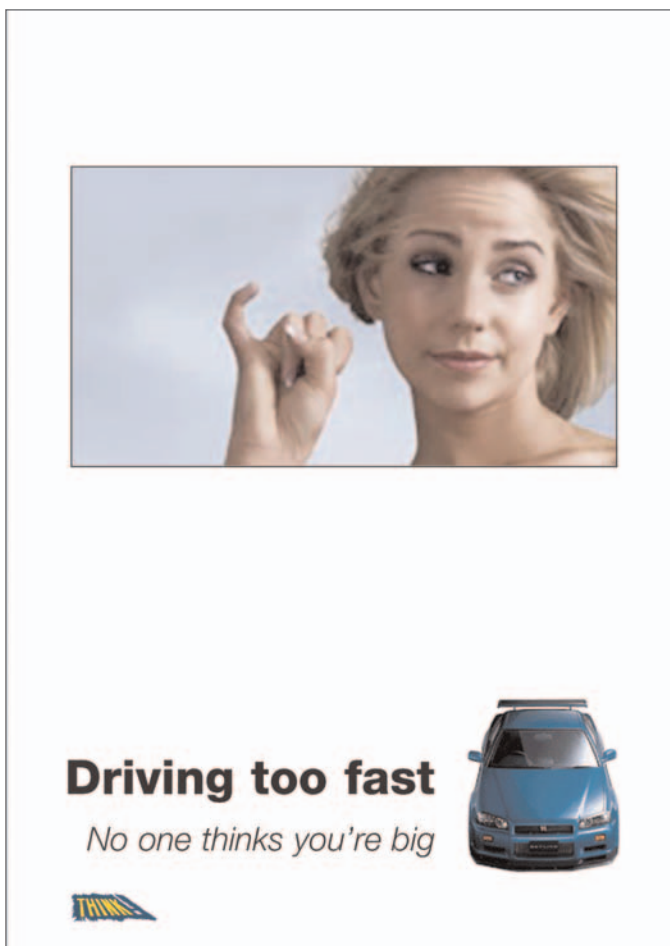
*"It's like if you're out with your friends, I think it's like the way that young drivers speak when they're in the car" (Female, Cwmbran)*

*"I think the swear word is needed to sort of make it seem like it's shouting at you more and it's like you're frustrated with yourself. It's supposed to make like the boy is frustrated that he can't walk up the stairs and that word just sort of makes it more, as if it's more personal to him. It's how you're going to feel, you're going to feel frustrated if you can't do things, because you put your foot down" (Male, N. London)*

The line 'driving too fast destroys lives' had little impact when used with this concept. However, in its own right it does have potential to be thought provoking.

### Concept C - 'Driving too fast. No one thinks you're big'

This concept, which was introduced for the first time at stage 3, is based on a campaign running in Australia at the time the research was carried out. It is an attempt to belittle the actions of 'boy racers' who drive too quickly. Some respondents commented that if someone did the little finger sign to them they would actually want to prove themselves by driving faster.



Overall, this concept did not perform well. Young drivers consider road safety to be a serious subject and expect campaigns on the subject to be serious.

That's not to say that humour cannot be used successfully but the 'tongue in cheek' approach used in this concept was deemed to be neither thought provoking nor appropriate. Respondents felt that in this instance the use of humour had been taken too far.

Furthermore, it was felt that a campaign like this could be open to ridicule by some young drivers and could therefore possibly have the opposite effect to that desired.

*"You'd just laugh at that; you don't actually think what it's telling you" (Male, Glasgow)*

*"I think it's a bit cheesy" (Male, Glasgow)*

*"I don't get what its trying to tell me" (Male, Leicester)*

*"You can be light hearted but not like that. For 17-19 year olds it's not the best age to be putting sexual innuendoes into adverts" (Male, N. London)*

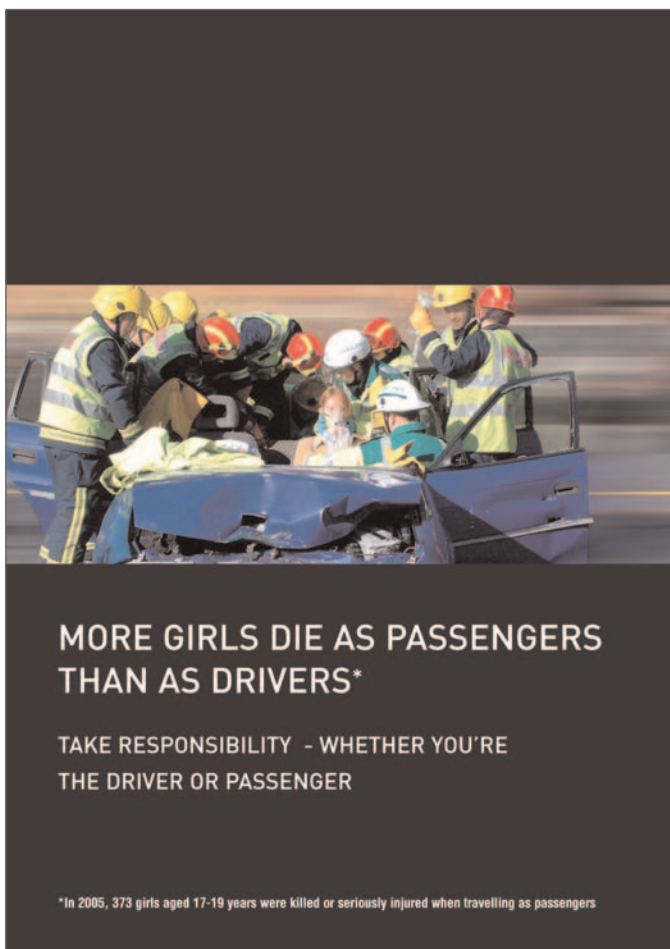
*"I think people would view that as taking the piss, like saying to someone if they're driving too fast, they're not big or something. They'll sort of take it the wrong way and they'll use it as a sort of, I don't know, they could sort of use it as a tease. It would become a joke. I don't think it's powerful at all" (Female, N. London)*

The approach was also seen to be aimed solely at male drivers - which could limit the campaign's reach and potential.

*"I think that's a bit sexist" (Female, Leicester)*

### Concept D - 'More girls die as passengers than as drivers'

A version of this concept was also tested at stage 2, when its key strengths were that it was 'believable' and 'relevant for young drivers'. It was modified for further testing in stage 3. The concept is an attempt to spell out to females the danger they can be in when travelling in a car driven by another young person. It also tries to remind young drivers - particularly males - of the responsibility they have for their passengers. The image shows a female passenger being cut out of a crashed vehicle, and uses the strap line 'take responsibility - whether you're the driver or passenger'.



This concept confused some respondents. They were unsure what it was saying to them, what the message was.

*"I don't know what girls are doing as passengers that make them die more" (Female, Leicester)*

*"I'm confused, like what I should think, what's it asking me and what's it telling me?" (Female, Glasgow)*

The research indicates that stating a fact often leads to the reader looking for an excuse or reason why the message is not relevant to them. In this instance many respondents felt that the message was not relevant for them because they rarely travel as a passenger.

Some respondents also commented that there could be a very valid reason for the statistic - maybe more young females travel as passengers than as drivers? Others felt that the message was being aimed at young males with girlfriends, but felt that safe driving issues are relevant for both sexes.

*"I don't really go in the car with other drivers so it wouldn't really affect me" (Female, Leicester)*

*"I think it is aimed at girls, telling them don't get in a motor as a passenger" (Male, Glasgow)*

*"I think it's just basically aimed at young lads that have got girlfriends in the car, I think" (Female, Leicester)*

*"I don't understand, is it like boyfriends driving and they crash or is it just more girls that crash?" (Female, Cwmbran)*

*"Have they made one saying about the boys statistics or don't they care about the boys being in the front and getting killed?" (Male, Cwmbran)*

## Detailed results - concepts

Although the image used in the concept was considered high impact, it could benefit from further development. Some felt that the scene appeared staged and there were comments that overall there is too much going on. The concept lacks a clear 'hook' to draw the reader further in - and as a result there's a danger that it could be skipped over.

*"There's too much going on, I don't understand exactly what's happening" (Female, N. London)*

*"I think it's quite a good campaign but I think you need a better picture" (Male, Glasgow)*

For many the scenario is too far from reality and therefore the concept is not particularly guilt inducing.

*"You never really think it will happen to you though, like if you read that, you never really think 'oh that could be a passenger in my car'" (Female, Cwmbran)*

The use of the statistic worked for some but not for others. Some felt that statistics like the one used here could be effective. However, there were others who felt such statistics have little relevance because they cannot relate them to their lives. If a statistic is to be read and absorbed, it will need to be very attention grabbing and 'in your face'.

*"It's too small to grab your attention" (Male, Cwmbran)*

*"I wouldn't take the time to stand and read the small print" (Female, Cwmbran)*

Statistics must also be as up to date as possible; two years can seem a long time to young people.

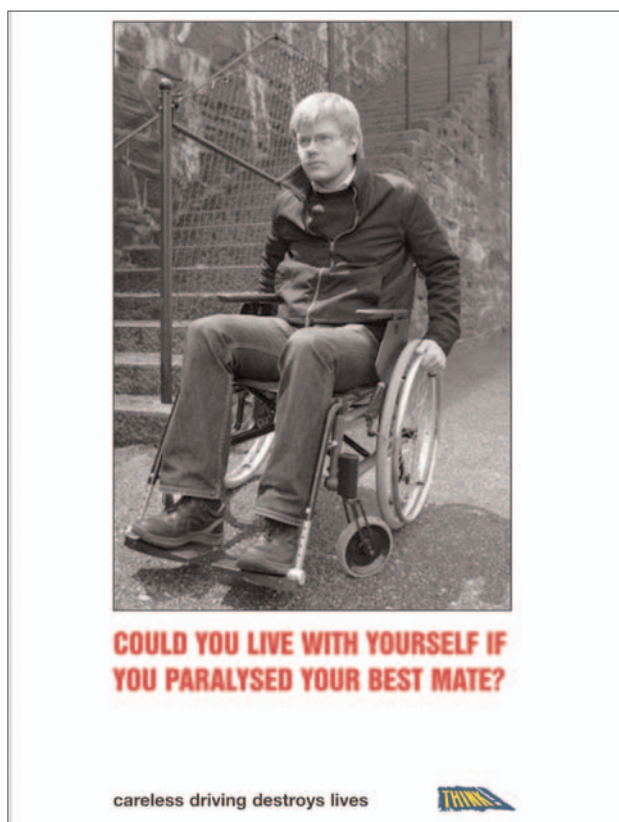
*"It's an old stat as well, 2005. I mean that could have declined or it could have increased, you don't know" (Male, Leicester)*

Respondents also questioned whether passengers could really take responsibility for avoiding a crash. It is questionable whether this concept could be used successfully as part of a campaign that uses peer pressure to communicate the message.

*"How can the passenger take responsibility?" (Male, Glasgow)*

### Concept E - "Could you live with yourself if you paralysed your best mate?"

This simple concept features a picture of a young man in a wheelchair, coupled with the strap line 'careless driving destroys lives'. It attempts to face the driver with the nightmare scenario of crippling their best mate who is a passenger while they are driving.



The visual used is not strong enough to grab attention or engender a sense of guilt - a picture of a male in a wheelchair is not perceived to be an uncommon sight. The visual needs greater impact.

Respondents suggested using 'before and after' images of the person. There were also comments from some respondents that they could not relate to the model used in the concept (because he looks too old) - and therefore they did not connect with him.

*"I just don't think it (the picture) is striking enough, like a guy in a wheelchair, there's nothing that grabs you"*  
(Female, Cwmbran)

*"The guy looks 40"* (Male, Glasgow)

Simply using an image of a person in a wheelchair is not enough for some young people - the outcome was not bad enough. They indicated that showing how life had changed - for example no longer being able to play sport, or having brain damage and requiring 24/7 care - is likely to provoke more powerful feelings of guilt. A more appropriate image or images would make this concept much more powerful and thought provoking. The image used does not communicate that the victim's life has been destroyed.

*"I think they could play more on the paralysed, like some people who can't eat by themselves and things like that. I think that would be more effective than just showing someone in a wheelchair"* (Female, Leicester)

*"There's a big difference to put them in a coma or physically do so much damage to someone that their life is completely shattered. I mean obviously his life's going to change, because he's paralysed - but he's still got a life"*  
(Male, N. London)

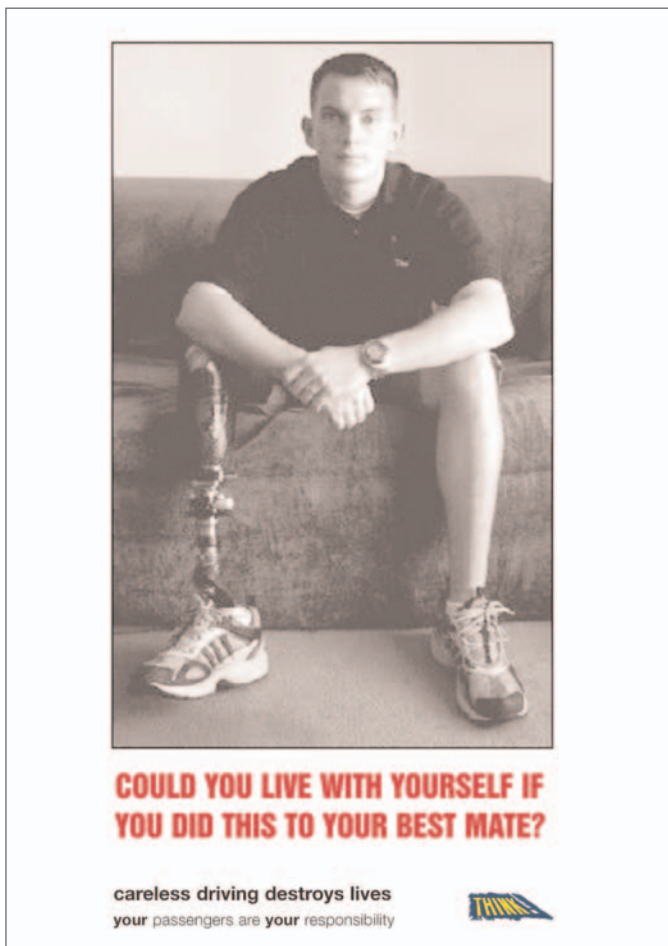
Asking the reader a question is powerful - it made many respondents think about their actions as they looked at the concept.

*"That (the head line) makes you stop and think. It's exactly what someone would say"* (Male, Glasgow)

The final strap line - 'careless driving saves lives' - was not perceived as powerful enough, although this could be due to the weak visual.

### Concept F - “Could you live with yourself if you did this to your best mate?”

This concept was tested at stages 2 and 3, and is based on a similar proposition to Concept E. Rather than a wheelchair, this time the image is of a young man who has lost a leg. Again the concept asks the question 'could you live with yourself' to a driver who has injured a best friend. It uses a double strap line - 'careless driving destroys lives' and 'your passengers are your responsibility'.



This concept performed well at stages 2 and 3. At stage 2 it performed well on all measurement attributes including 'thought provoking', 'hard hitting' and 'making people think long term'.

The image used also performed well. Respondents related well to the person in the picture - he is of a similar age to them and came across as 'normal'. The visual has initial impact and drew respondents in to focus on the advert further - they were interested to find out what it was about.

*“That's more striking because it's unusual as well, because its not like often you see people with a mechanical leg, but you see a lot of people in wheelchairs” (Male, Cwmbran)*

Some respondents felt that with subtle changes to the image, the concept could have even greater impact.

*“I wouldn't put the fake leg on. I know it sounds horrid but I think it would be more shocking to see him without it” (Male, Glasgow)*

*“There is something about it that's not quite there. He doesn't look very sad or depressed” (Female, N. London)*

The headline and visual work well together and respondents could not help but put themselves in the position of the driver who had caused the accident.

*“You realise you have to be more careful when you've got mates in the car” (Male, Leicester)*

*“It just shows you what you could actually do. Not to yourself - it's to the people that you've got in your car as well” (Female, Leicester)*

A key strength of the concept is that young drivers can imagine and relate to what might have happened. The concept gives no details of what actually happened, but does not allow the reader to make excuses for the driver.

## Detailed results - concepts

*“Its like when you first pass your test you like get your mates in the car 'look how fast I'm driving', you seem to show off a bit more and then that (pointing at concept) hits you. That you're putting yourself and your mates at risk” (Male, Leicester)*

Because of the strength of the visual the 'careless driving destroys lives' strap line has greater relevance. And the line 'your passengers are your responsibility' is perceived as having particular impact - though with some respondents this was not the case.

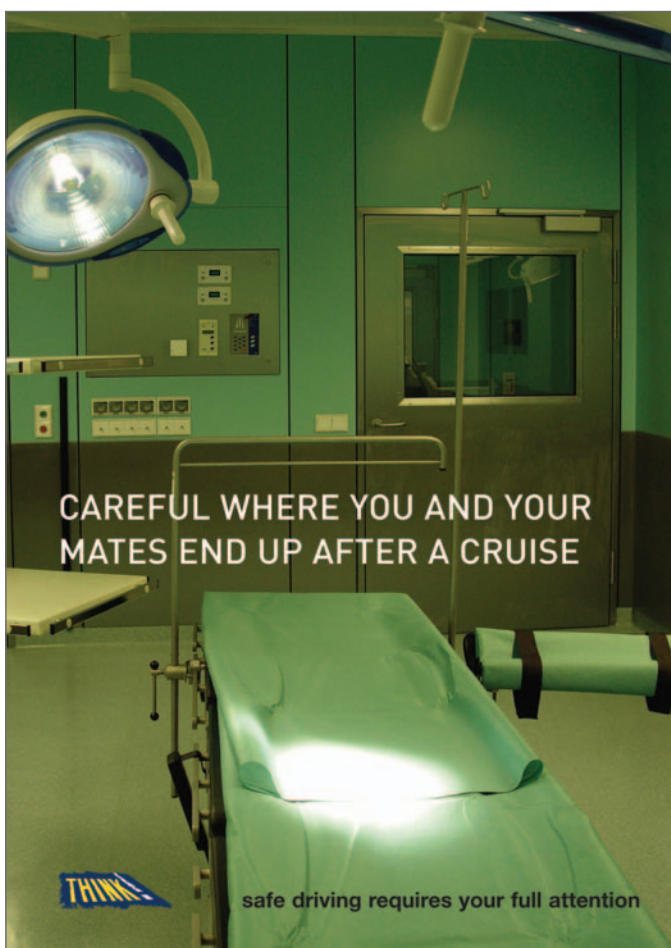
*“Seeing that, 'your passengers are your responsibility' saying to you about the fines for seatbelts and that, it's your passengers' responsibility for wearing a seatbelt if they are over 15 years of age” (Male, Glasgow)*

*“That is the main thing, 'your passengers are your responsibility', I think it should be bigger” (Female, N. London)*

*“They could say 'your mate, your car, your responsibility' I think that would work well” (Male, N. London)*

### Concept G - “Careful where you and your mates end up after a cruise”

The concept features a photo of a hospital bed and language likely to be used by young people. It was tested at stages 2 and 3. Its key strengths at stage 2 were that it was 'believable' and 'relevant to young drivers'. It uses the strap line 'safe driving requires your full attention'.



Overall, the concept performed reasonably well. The idea is seen to be relevant to young drivers but the photo did not perform well with all respondents - many were unclear what it was trying to depict. In addition, the concept does not show a strong or clear enough outcome - and therefore fails to induce feelings of guilt.

*“I think it's a good idea but I wouldn't stop and look at that picture” (Male, Glasgow)*

*“It looks like a dentist” (Male, Cwmbran)*

Suggestions include changing the visual to:

- A morgue
- A young person in a coma (e.g. visual used in concept H)
- A young driver or relatives next to the passenger lying seriously injured in hospital

The language used was widely debated among the groups. Whereas some thought it relevant for young drivers, others felt that the word 'cruise' is not widely used and should be changed. The term can also have other meanings - e.g. booze cruise - and appears more likely to be used by young people in some areas of the UK than in others.

*“No one uses the term cruise do they?” (Male, Leicester)*

*“I like the fact that its got the term mates because that makes you as a driver seem more responsible” (Female, Leicester)*

The strap line 'safe driving requires your full attention' lacks impact. Respondents felt it stated the obvious and did not grab their attention.

*“It is just obvious” (Female, Cwmbran)*

*“It is true but I just think the way they've worded it doesn't really grab you” (Female, Leicester)*

The layout - using the image full page with the words laid over - worked well. Young drivers were drawn in to look for the full meaning of the advert.

### Concept H - “My best mate's in a coma - and I was the driver”

This concept uses a picture of a young driver in the foreground, and an image of a casualty in intensive care in the background. The headline appears as a quote from the driver, who is named - and lives close to where the focus group was taking place. It also asks the reader a question - 'could you live with yourself if you did this?'

The concept was tested at stages 2 and 3. Its key strengths at stage 2 were that it was 'believable', 'relevant to young drivers', 'hard hitting' and 'thought provoking'.

This concept performed very well. The use of a question led to respondents putting themselves in the place of the driver, and subsequently to feelings of guilt. The fact that the concept appeared to be a true-life case study was also positive. Learning from the real life mistakes of others could be an effective approach - especially if the scenario is so realistic that it could actually happen to anyone.

*“I like the fact that it's a quote, you can relate to it and I really like the 'could you live with yourself if you did this?' because you question yourself” (Female, Leicester)*

*“It's a quote as well, it makes it more real” (Female, Glasgow)*

*“You can relate to it and you would actually know that's what would happen to your mate and actually would you be able to live with it and you think about that probably before you drive, if you've got mates in the car” (Male, Leicester)*

However, the importance of using the right model is very evident. There were comments across the groups that the model did not look very sincere and respondents found him difficult to relate to.

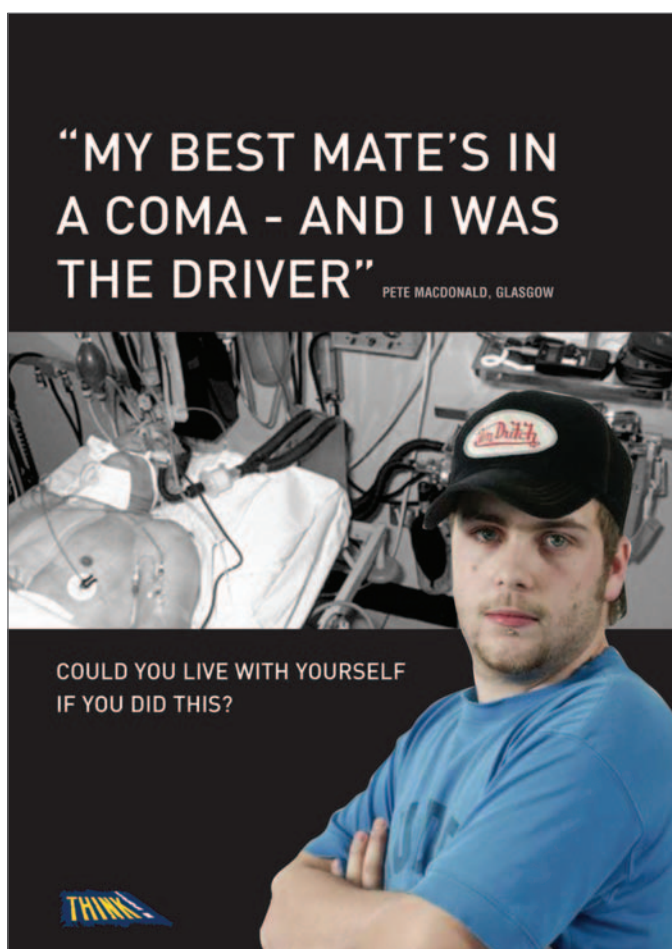
*“He looks like he's quite proud of himself” (Female, N. London)*

*“He's like someone on Jeremy Kyle” (Female, Cwmbran)*

*“He looks like he's going to crack a smile in a minute” (Male, Leicester)*

The hospital scene was felt to be particularly thought provoking and 'chilling'.

*“I like the colours, black and white, it's morbid isn't it? It's thoughtful and reflective” (Male, N. London)*



## Detailed results - concepts

*“I think the picture in the background is really good. Its like what someone would look like in hospital, its not fake looking...” (Female, Leicester)*

Including a 'local' element provides greater credibility - respondents could relate to it more. What is perceived as local is very subjective and based on one's own experiences but respondents felt that it should be at a county level.

*“It does work and it's our home town...I think it's more effective because it says Glasgow” (Male, Glasgow)*

It may be worth considering an additional line to make it clear that the situation was caused by the driver taking an unnecessary risk, or not paying attention.

### Concept Ranking

After seeing and discussing the concepts separately, each group was asked to rank them in order of effectiveness. Concepts H and F performed consistently well, and concepts that asked a question had the greatest impact.

	Glasgow	Cwmbran	N. London	Leicester
1st	H	H	F	F
2nd	E	F	B	H
3rd	F	A	G	B
4th	G	G	H	D
5th	D	D	D	A
6th	B	B	E	G
7th	A	E	A	E
8th	C	C	C	C

Key to concepts:-

- A - Carefree, Careless, Cared for
- B - Bet you wish you hadn't put your f\*\*\*king foot down now?
- C - Driving too fast - no one thinks you're big
- D - More girls die as passengers than as drivers
- E - Could you live with yourself if you paralysed your best mate?
- F - Could you live with yourself if you did this to your best mate?
- G - Careful where you and your mates end up after a cruise
- H - My best mate's in a coma - and I was the driver

### Media

Respondents were asked what media they felt the campaign should use to gain maximum exposure to young people - but taking into account that TV was unlikely to be an option due to budgetary constraints. They suggested the following:

- Pub/club toilets
- McDonalds drive through/car parks where young people 'hang out'
- Cinema
- Buses
- Radio
- Bill boards
- Local paper
- Social networking websites such as MySpace or Face Book

### Other road safety campaigns

Respondents were asked to name other road safety campaigns that they could recall. They identified the following:

#### Pizza (seatbelt)

The 'pizza' seatbelt advert was mentioned across the groups. Its strength was that it used a scene that most young people can relate to, and that the crash and outcome (the passenger was in fact wearing a seatbelt) came as a surprise.

#### Young woman run over in a pub (drink drive)

This drink drive advert had recently run on TV when the groups took place. Its strength was its hard-hitting visual depiction of someone being run over, and the fact that she is run over in an unusual setting (a pub).

*"You don't expect it" (Female, N. London)*

*"It's like you're watching a story, whistling at some woman and then it just happens" (Female, N. London)*

#### "If you hit me at 30"

This advert was widely remembered across the groups. Its main strength was that hitting a child is cited as possibly the worst scenario for a driver.

*"No one would want to hit a child would they?" (Female, Leicester)*

### Possible changes to the law

Respondents were asked how they felt that possible changes to the law that have been discussed in the media would affect young drivers.

They were particularly unhappy about any change in the law that would forbid them from carrying passengers at night. They felt that such a law would be unworkable, would be

## Detailed results

widely broken, and could have other more negative outcomes including:-

- Encouraging people to drink drive as they could not get a lift
- Putting more people in danger by having to walk home or take an unlicensed taxi.

There was more support for raising the minimum driving age to 18 years, but some respondents questioned whether raising the age by just one year would improve safety. They felt that attitudes and behaviours of 18 year olds are only marginally different to those among 17 year olds. Some felt that to make any real difference the age would have to be raised by at least a couple of years, if not more. It was also suggested that newly qualified drivers should go through a yearlong probation period before receiving a full license.

There was widespread support for a zero drink drive limit. However, it was also felt that this could lead to problems with driving the 'morning after' as many people would need to drive but may still have a trace of alcohol in their body.

# 5.0 Conclusions & Recommendations

- A number of the concepts tested could, with modification, form the basis for a successful campaign aimed at young drivers.
- Respondents felt that any campaign should target both sexes. They felt that in general the concepts they were shown at stage 3 were aimed more at males than females - but they felt that road safety issues and messages are equally relevant for both sexes.
- Visuals play a vital role in engaging this age group. 17-20 year olds are initially more drawn to images than text - it is important that the image provokes an immediate reaction.
- People in the 17-20 year old age group have been exposed to numerous road safety campaigns. To stand the greatest chance of success, a future campaign should lead to a young driver thinking about their own behaviour - even if only for a split second.
- People in this age group are clearly drawn to strong visuals more than text - it is vitally important that the imagery used 'hits a nerve'. Any information given must be short and must not leave the reader feeling that the scenario could 'not happen to me'.
- Although young drivers see speed as a major factor in many crashes, they see lack of attention and carelessness as placing them at greatest risk. Changing a CD, iPods, mobiles phones, passengers and 'people watching' - everyday actions that respondents recognised could lead to an accident.
- Final strap lines have little impact if the visual fails to 'hit a nerve'.
- Respondents felt that the phrase 'careless driving' covers a wide range of possible crash scenarios including speeding and inattention.
- By contrast, they identified 'safe driving' with speed. They also felt that it sounds too authoritative - something a parent or a driving instructor might say. The final strap line must be blunt and relevant if it is to be successful.
- Asking a question in a headline and/or strap line was successful. There was a tendency for the reader to place him or herself in the position of the driver, and therefore experience feelings of guilt about what had happened.
- Young drivers find the prospect of dying less worrying than being left in a vegetative state and having to be looked after 24/7 by their parents.
- They also said that living with the guilt of killing or seriously injuring a friend would be worse than being killed themselves.
- In the concept '*Carefree, Careless, Cared for*' the driver is left brain damaged - but the reader does not know what happened to the passenger. Respondents - who put themselves in the position of the driver - were therefore less likely to feel a sense of guilt.
- Conversely, in '*Best mate in a coma*' the passenger is seriously injured while the driver is unharmed. This is a much more likely to induce a sense of guilt and responsibility.
- It is crucial that a concept does not leave the reader feeling that the scenario could never happen to them. '*Could you live with yourself?*' worked particularly well because respondents did not feel the need to work out what happened and then make excuses for the driver. They are literally put into the driver's shoes and cannot escape feelings of guilt and responsibility.

## Conclusions

- *'Careful where you and your mates end up after a cruise'* does this less well because it allows the reader to make too many assumptions and sympathise with the driver. As the reader is not sure what the outcome was, nor what caused the accident, the scenario could have been caused by a variety of circumstances - including something beyond the driver's control.
- Providing the reader with the correct amount of information is a delicate balance. Too much information can reduce impact - the reader does not feel compelled to work out the message and they are unlikely to use their imagination to best effect. In the case of the concept *'More girls die as passengers than as drivers'* many were unsure what the message was and what emotions they should be feeling.
- Case studies can be used to great effect but it is important that readers can relate to the scenario and the people involved. The model used in *'Best mate in a coma'* does not come across as sufficiently sincere to be taken seriously. In the concept *'Putting your foot down'* the view of someone in a wheel chair looking up a flight of stairs is not deemed to be shocking enough. It is clear that any model used must be someone that young people can relate to. This means they have to be of a similar age to the target group, they must look sincere about what has happened, and dress in a way that will not alienate the majority of young people.
- *'Could you live with yourself?'* worked better with the 'false leg' than the wheelchair. It is a more unusual image and respondents identified more with the model in that concept - he is younger and wearing the right kind of clothes.
- Although young people may generally respond well to humorous campaigns, there is a danger that they can be ridiculed and not have the desired effect. *'No one thinks you're big'* was perceived as being too 'tongue in cheek' and as such could have the opposite effect to that desired. It may inspire some young drivers to feel the need to prove themselves.

# Appendix 1 - Methodology

A multi-method approach was adopted and executed in three stages. All UK government regions were included in the research with the exception of Northern Ireland.

## Stage 1

A qualitative methodology was adopted. Four focus groups took place during April 2007, with 7-8 young drivers in each group. Locations were selected to ensure a mix of urban and semi-urban young drivers were included in the research. The locations were; Yate (near Bristol), Stockport (Greater Manchester), Harlow (Essex), and Bexley Heath (Kent).

One recruiter was used in each location and respondents were free-found and received an incentive of £25. All groups were moderated by Lee Tomlin, Research Director of QRS. The sampling criterion were as follows:

- Aged 17-20 years;
- Mix of males and females in each group;
- All to have passed the driving test and own their own car;
- Mix of working people and students in each group;
- All to be social class B/C1/C2/D;
- No respondents to have attended a focus group in the past six months, and never on the subject of motoring.

The composition of the four groups was:

Group	Location	Males	Females
1	Yate	3	4
2	Stockport	4	4
3	Harlow	4	4
4	Bexley Heath	4	4

## Stage 2

A quantitative methodology was adopted. Young drivers were invited to attend a hall test venue where a structured questionnaire was administered by QRS interviewers.

Four hall test days took place in Sheffield (Yorkshire), Sutton Coldfield (West Midlands), Whitley Bay (Tyne & Wear), and Gosport (Hampshire), between 16-23 June 2007. At two of the locations (Sheffield and Sutton Coldfield) a senior QRS executive attended to talk to a selection of respondents in more depth about the draft creative concepts. A final sample size of

130 was achieved. The sampling error on a sample size of 130 is +/-8.6% (95% confidence level).

All respondents were aged 17-20 years, had passed their driving test and owned their own car, and received £15 in cash for attending.

## Respondents' profile

63 Males

67 Females

56 17-18 year olds

74 19-20 year olds

## Stage 3

A qualitative methodology was adopted. Four focus groups took place during August 2007, with 6-8 respondents in each group. Locations were selected to ensure a mix of urban and semi-urban young drivers were included in the research. The locations for the focus groups were; Winchmore Hill (North London), Glasgow (Scotland), Leicester (East Midlands), and Cwmbran (Wales).

One recruiter was used in each location and respondents were free found and received an incentive of £25. All groups were moderated by Lee Tomlin, Research Director of QRS. The sampling criterion was the same as for stage 1.

This research was conducted under the Code of Conduct of the

The composition of the four groups was:

Group	Location	Males	Females
1	N. London	3	4
2	Glasgow	4	4
3	Leicester	4	4
4	Cwmbran	3	3

Market Research Society and in compliance with ISO20252:2006. Please note that the results of qualitative research cannot be projected to the overall population due to sample selection, interviewing methods and sample size. Copies of questionnaires and discussion guides are available from the project managers.