

Changing Attitudes to Vehicle Safety in Australia

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Car safety – some history

- Car manufacturers since the 1930s worked to build **safer cars**.
- Ralph Nadar (1965-blamed manufacturers for ignoring safety).
- Australia made the wearing of **seat belts** for drivers and front seat passengers **compulsory** in 1970. A consumer debate broke out about “**people’s right to kill themselves**”!
- By the early 1990s there was concern that new cars in Australia were **less safe** than cars sold in the USA.
- Australian NCAP (ANCAP) began testing 1992 and published first crash test results in 1993.

Car safety advertising – then

- Safety increased in ranking as a primary advertising message
 - 8th in 1981-82
 - 5th in 1992-93 (ANCAP commenced)
 - 4th in 1993-94
- But, safety as a selling message was only used in 19.2% of advertisements in 1993-94.
- The main messages were **performance, speed, racing, power and technology.**
- Safety features promoted were **braking systems, control/handling, airbag, engineering/crashworthiness.**

Early consumer views from polling

1993

- Safety features a consideration for 20% of new car buyers but **only 3%** consider safety as the **main priority**. (FORS 1993)
- Main factors for new car buyers were **reliability** (59%), **fuel economy** (94%) and **safety features** (49%); ahead of **performance** (22%). (AAA 1993)

Attitudes to safer cars-then

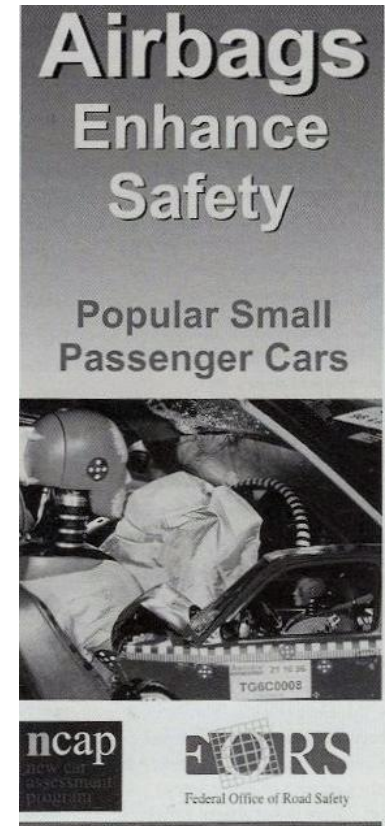
1996

- Motorists **wanted to know more** about crashworthiness.
- Only a few were aware of impact absorption features.
- Research reported majority views that;
“**Cars that crumple are ‘made of plastic’ and not as safe as older, solid cars.**”
- **Awareness** that new vehicles were crash tested to assess the risk of injury to occupants was **extremely high** (90%) although:
 - only 14% claimed to have seen brochures relating to crash tests
 - only 36% of that group had used the brochure

Introducing safety – then

1996

- AAA called on the Federal Government to have **airbags exempted from sales tax** (following precedent set earlier for seat belt exemption).
- AAA estimated a **15% reduction** in road trauma.
- This submission was unsuccessful but the Government did join with ANCAP in a cooperative project to compare crash test results of cars with and without airbags.



Attitudes to car safety features – then

1997

- Continuing misconceptions about what made a car safe.
- 2/3 of motorists mentioned **airbags** and **seat belts** as the **top safety features** however airbags were misunderstood:
 - <50% wanted one in their next car
 - 20% wanted one “a great deal”
 - **40% did not want one at all!**
- Airbag credibility had been undermined by a series of bad news stories from the USA.
- Crumple zones were only recognised as a safety feature by 13% of respondents.

Industry view – then

- From the beginning, manufacturers and importers as a group set out to **discredit ANCAP testing** despite the obvious benefits to consumers.
- This meant selling the ‘safer vehicles’ message was **not even supported by those who made the safe cars** (at least when presenting as a group through the Federal Chamber of Automotive Industries).

“The FCAI believes that ANCAP ratings do not meet these criteria and are therefore potentially misleading to consumers.”

FCAI Chief Executive 2001-2003

Industry breakthrough

- Late 2001 saw a **breakthrough in manufacturer recognition** of ANCAP tests.
- First of many **5 star** ANCAP safety ratings achieved:
 - Renault
 - Mercedes-Benz
 - Saab
 - Subaru
- Renault Laguna and Subaru Forester proudly exhibited the ANCAP logo at the Melbourne Motor Show (February 2002).
- First 5 star ANCAP rated Australian car – **2008 Ford Falcon**.

Industry view – now

2012

“The huge investment being made by manufacturers in vehicle safety technology has assisted in cutting the number of road fatalities.”

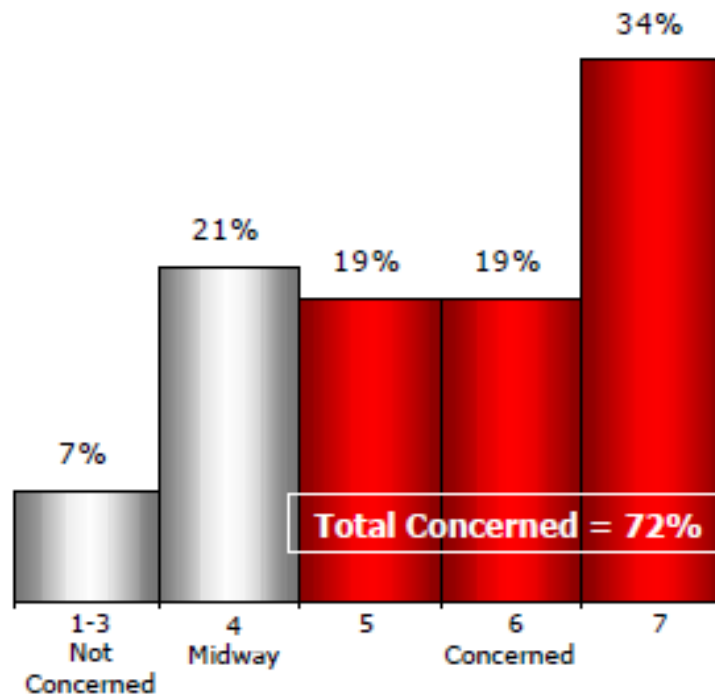
“Almost 92% of new cars sold in Australia during 2011 were rated 4 or 5 star by ANCAP.”

“FCAI is also working with ANCAP on the rollout of its safety road map.”

FCAI Chief Executive 2012

Concern about Road & Car Safety - Trends

2003 Rating of Personal Concern



1999:	6%	16%	19%	23%	35%
1995:	2%	4%	12%	23%	59%

Summary of Key Trends:

- The **mean rating of concern about road and car safety** has fallen from 6.3 in 1995 to 5.6 in 1999 and 5.5 in 2003. While the mean rating has dropped, one-third remains "extremely concerned".
- Those most concerned about safety are **women**, especially those with children.

AAA National Survey of Motorists' Attitudes, 2003



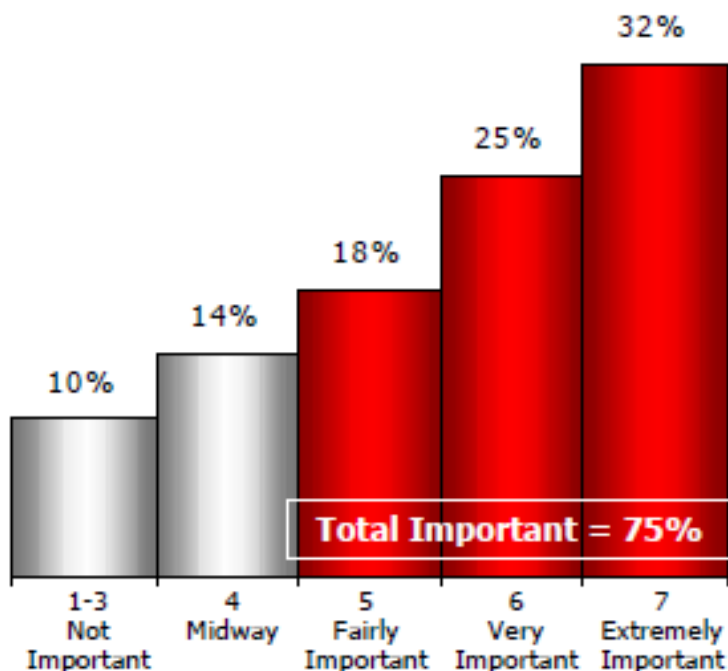
ANCAP

Crash testing for safety

Importance of Safety in Vehicle Choice 2003



Rating of Importance: Among Car Owners



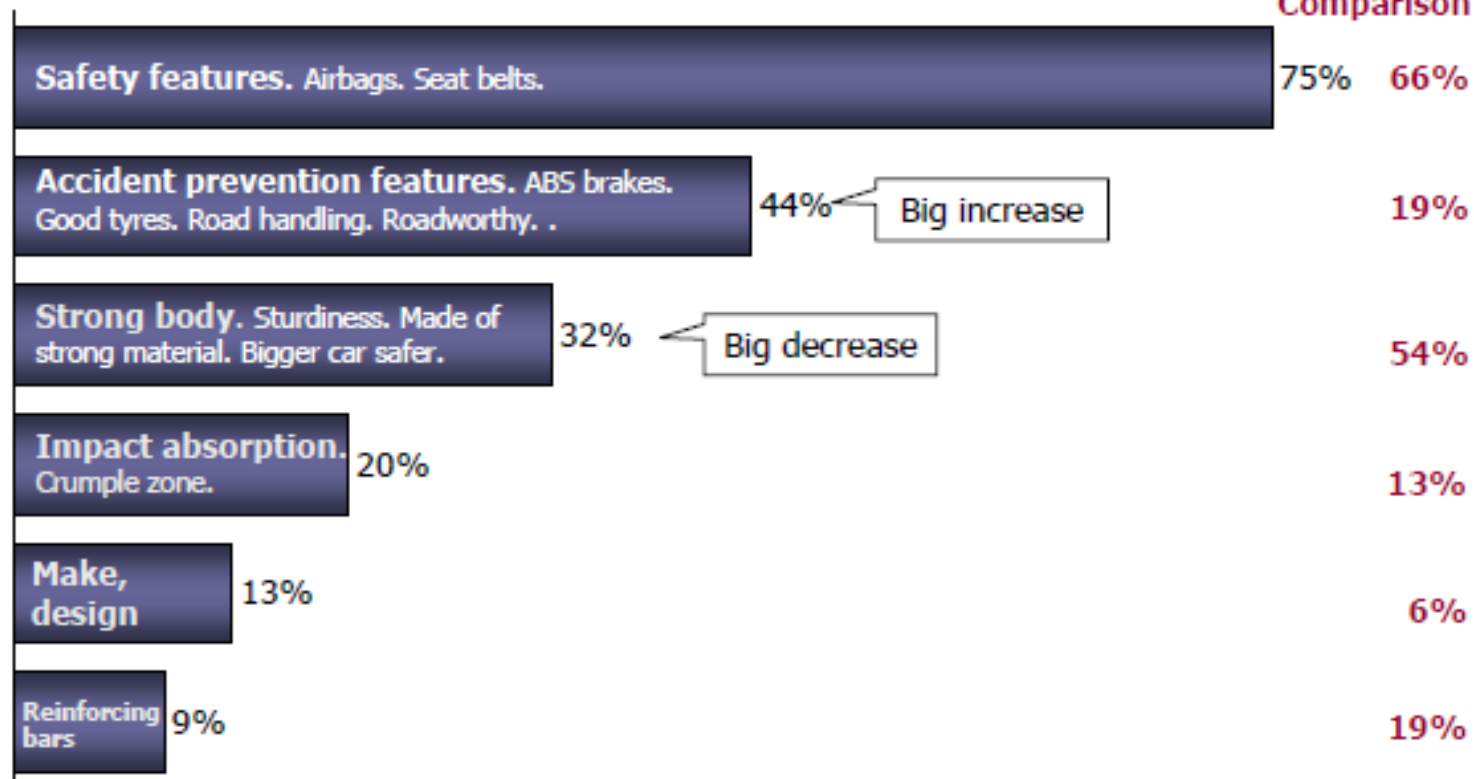
Summary of Key Results:

- 91% of motorists report that they **drive their "own" car**: 35% bought it new, and 56% second hand.
- The mean rating of **importance of safety in their choice of car** is 5.5.
- Safety is more important in vehicle choice to women, especially mothers, and those with newer cars.

Car Crashworthiness Trends 1997-2004



What helps to make a car safe in a crash? (open-ended question)



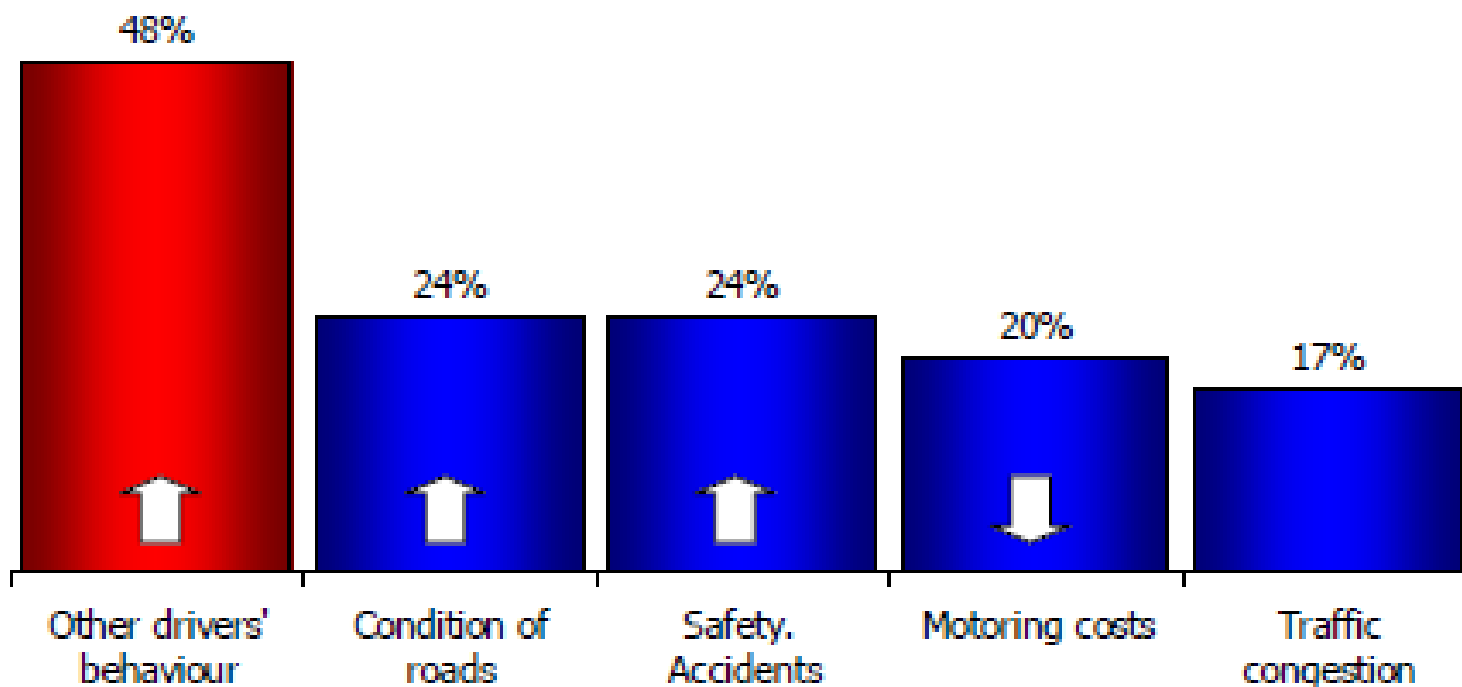
AAA Safer Roads National Survey, 2004



ANCAP

Crash testing for safety

Motorists' Main Unprompted Issues in 2005



2003:	37%	16%	18%	26%	14%
2000:	28%	22%	16%	54%	12%

AAA National Survey of Motorists' Attitudes, 2005



ANCAP
Crash testing for safety

Consumers in the showroom

2006

- General Motors Holden introduced a new model **Barina**.
- The new model scored only **2 stars** compared to **4 stars** for the previous model.
- **Sales dropped** from **18%** of the market segment to **8%**.
- This issue was not limited to Australia – Euro NCAP's test results were similar.



ANCAP
Rated ★★☆☆☆



ANCAP
Rated ★★☆☆☆

Real recognition & results

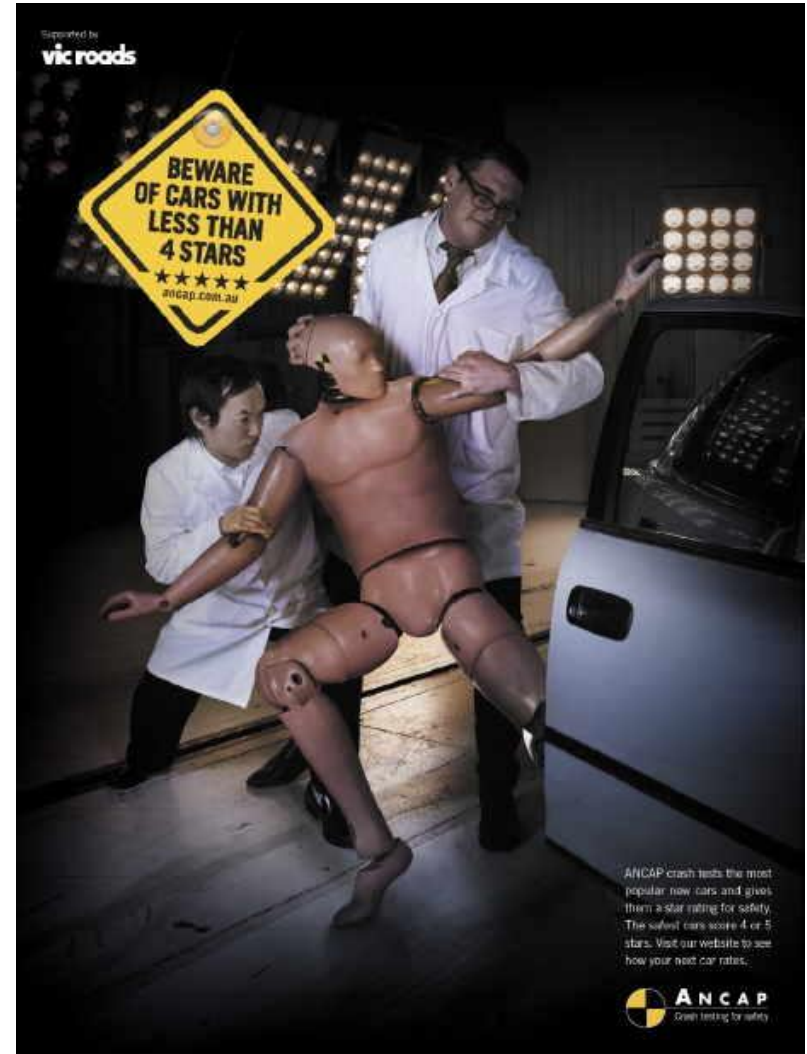
GM Holden chairman and managing director revealed that he was "concerned" by the bad publicity surrounding the GM Daewoo-sourced Barina's NCAP performance.

He said the Australian results – which confirmed a Euro NCAP rating conducted in February – had come as a "surprise" to his technical staff and that Holden engineers were now working with Australian NCAP to examine discrepancies between the public test and the company's own (confidential) internal results.

Nevertheless, he conceded that the poor crash-test publicity the Barina attracted last month when the Australian NCAP results were released had negatively impacted on sales.

ANCAP labeling & awareness

- ANCAP encouraged voluntary labeling at dealers
 - Subaru promoted 5 star fleet (2008)
 - Stakeholders assisted dealers to display labels in WA and SA (2008-present)
- **Awareness of “BEWARE OF CARS UNDER FOUR STARS” rose from 8% (August 2011) to 38% (December 2011) - (SA).**



Ford Australia



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Safety

5-Star ANCAP

5-Star ANCAP Occupant Safety Rating



The entire Subaru range achieves the maximum 5-Star occupant safety rating

BENEFIT TO YOU

>> Australian tested every Subaru achieves maximum 5 star rating



◀ REPLAY /



brilliant silver metallic* (9744)



Mercedes-Benz

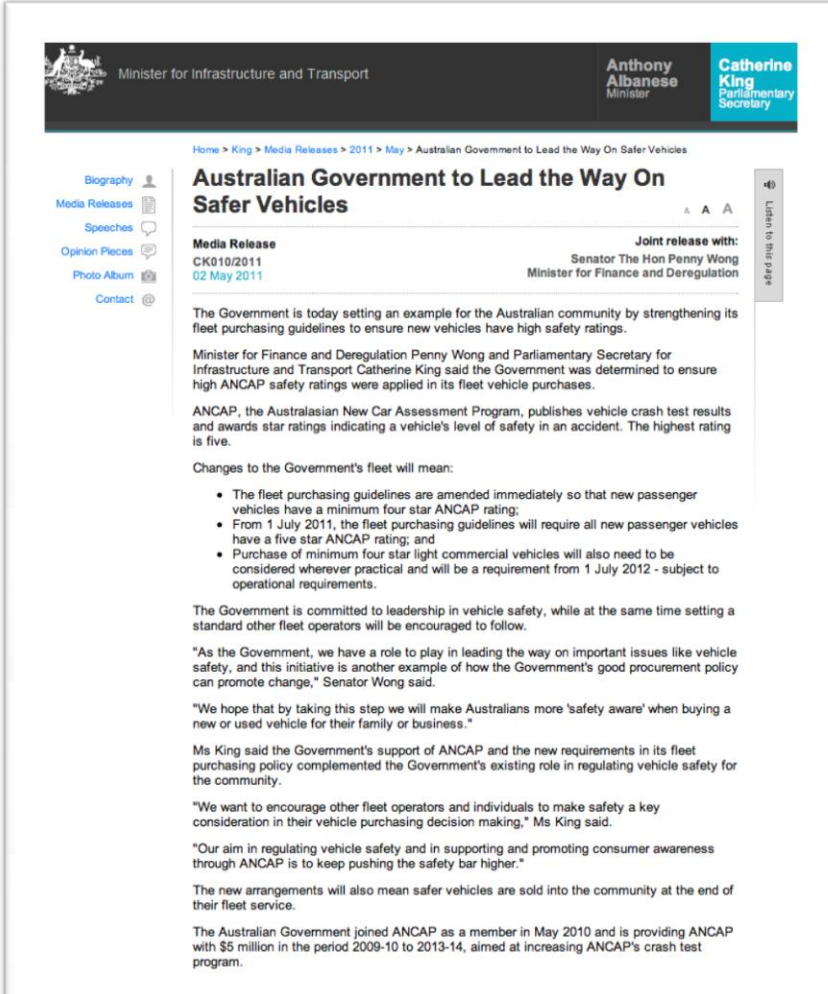


Mercedes-Benz



2011

- Commonwealth Government introduces mandatory requirement for **5 star passenger vehicles** in its fleet and **4 star requirement for light commercial** vehicles announced to take effect from 1 July 2012.
- **92%** of passenger vehicles sold in Australia are rated 4 stars or higher.
- 62% of these have been awarded the **maximum 5 star rating**.



Minister for Infrastructure and Transport

Anthony Albanese
Minister

Catherine King
Parliamentary Secretary

Home > King > Media Releases > 2011 > May > Australian Government to Lead the Way On Safer Vehicles

Australian Government to Lead the Way On Safer Vehicles

Media Release
CK010/2011
02 May 2011

Joint release with:
Senator The Hon Penny Wong
Minister for Finance and Deregulation

The Government is today setting an example for the Australian community by strengthening its fleet purchasing guidelines to ensure new vehicles have high safety ratings.

Minister for Finance and Deregulation Penny Wong and Parliamentary Secretary for Infrastructure and Transport Catherine King said the Government was determined to ensure high ANCAP safety ratings were applied in its fleet vehicle purchases.

ANCAP, the Australasian New Car Assessment Program, publishes vehicle crash test results and awards star ratings indicating a vehicle's level of safety in an accident. The highest rating is five.

Changes to the Government's fleet will mean:

- The fleet purchasing guidelines are amended immediately so that new passenger vehicles have a minimum four star ANCAP rating;
- From 1 July 2011, the fleet purchasing guidelines will require all new passenger vehicles have a five star ANCAP rating; and
- Purchase of minimum four star light commercial vehicles will also need to be considered wherever practical and will be a requirement from 1 July 2012 - subject to operational requirements.

The Government is committed to leadership in vehicle safety, while at the same time setting a standard other fleet operators will be encouraged to follow.

"As the Government, we have a role to play in leading the way on important issues like vehicle safety, and this initiative is another example of how the Government's good procurement policy can promote change," Senator Wong said.

"We hope that by taking this step we will make Australians more 'safety aware' when buying a new or used vehicle for their family or business."

Ms King said the Government's support of ANCAP and the new requirements in its fleet purchasing policy complemented the Government's existing role in regulating vehicle safety for the community.

"We want to encourage other fleet operators and individuals to make safety a key consideration in their vehicle purchasing decision making," Ms King said.

"Our aim in regulating vehicle safety and in supporting and promoting consumer awareness through ANCAP is to keep pushing the safety bar higher."

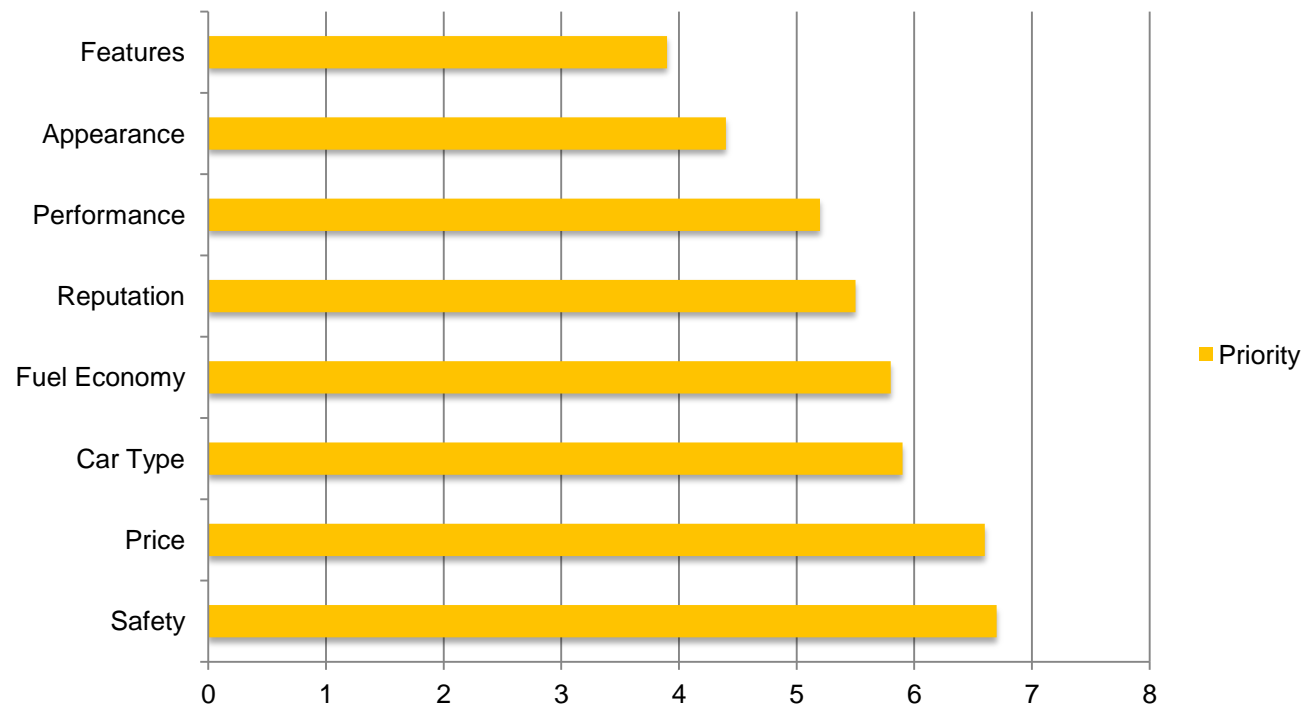
The new arrangements will also mean safer vehicles are sold into the community at the end of their fleet service.

The Australian Government joined ANCAP as a member in May 2010 and is providing ANCAP with \$5 million in the period 2009-10 to 2013-14, aimed at increasing ANCAP's crash test program.

Attitudes to car safety – now

2012

- Consumers ranking **safety** as **equal first priority** (with price).

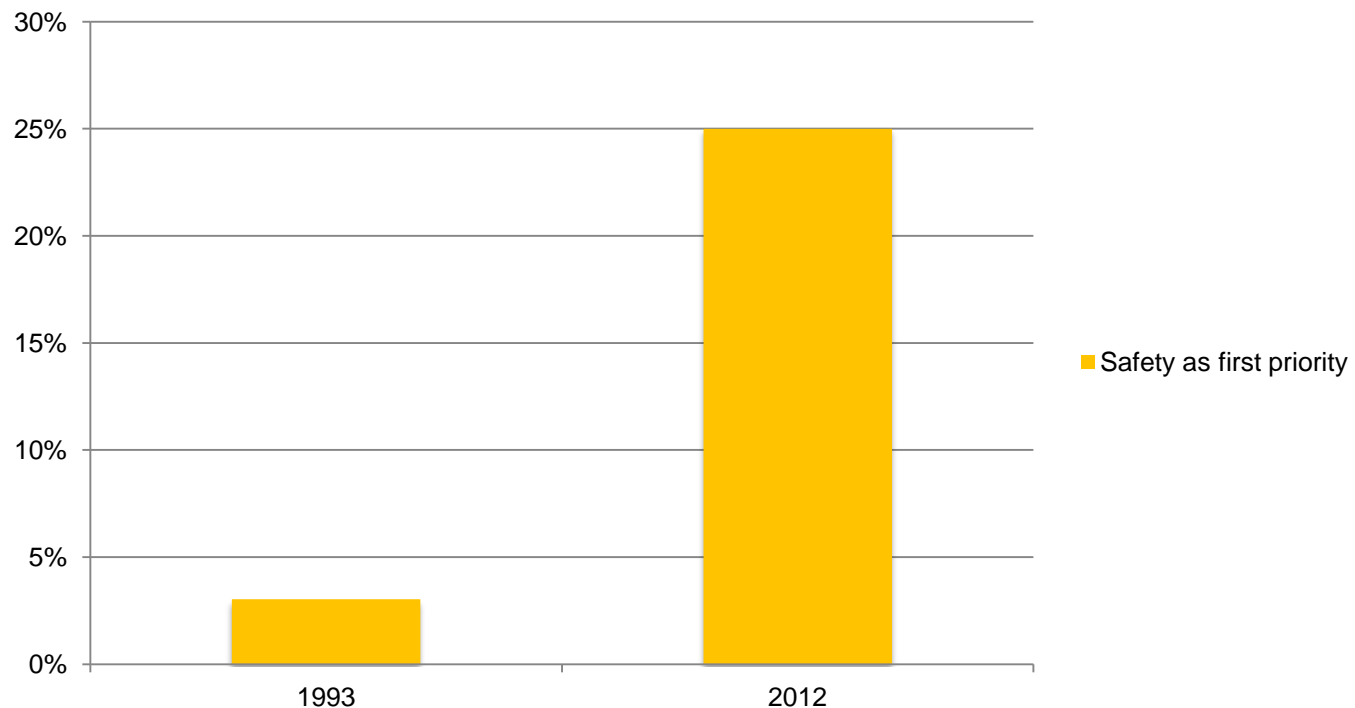


Intuitive Solutions Brand Tracking Research, 2012

Attitudes to car safety – now

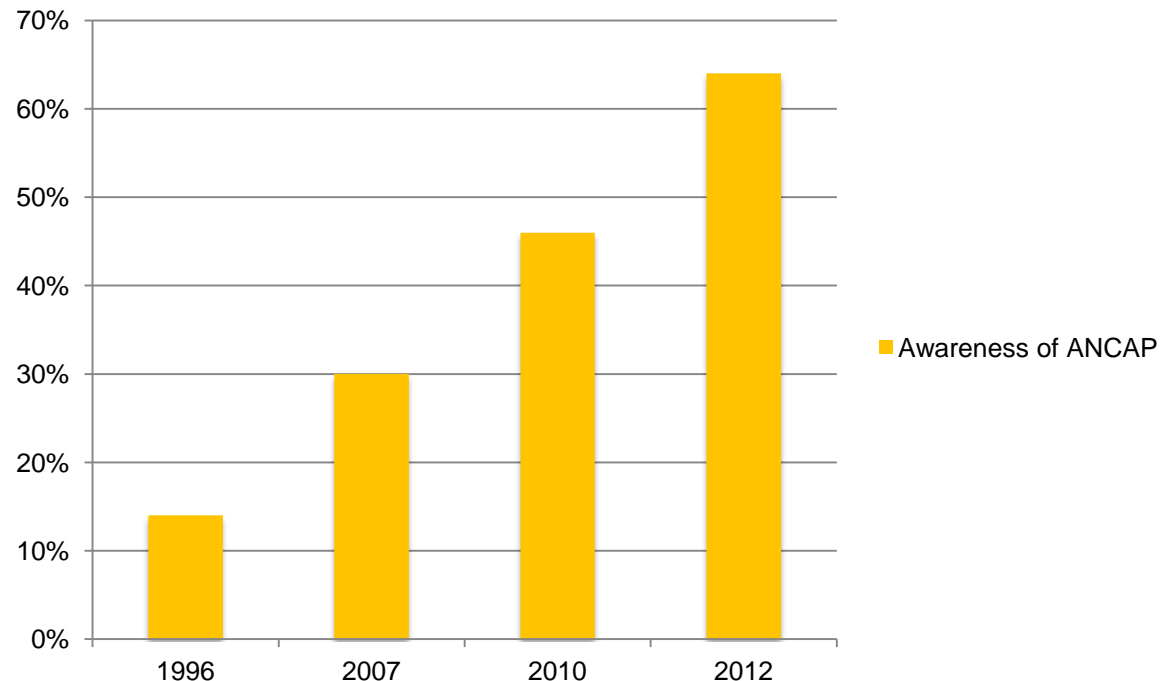
2012

- 1 in 4 consumers ranking safety as their **first priority**.
(cf 1 in 5 as a consideration and 1 in 33 as a main priority in 1993)



Recognition of ANCAP – now 2012

- Awareness of ANCAP has risen to **64%** of new car buyers – a significant improvement on the 2010 result of 46% and 30% in 2007.



Today



- **Increased visibility of ANCAP logo** in print and TV advertising by manufacturers.
- Consumer openness to receive safety information via manufacturer websites and dealerships.
- Lack of concern for safety by some **commercial customers** – not willing to pay more for additional safety features or a safer vehicle.



Lessons learned for ANCAP

- Credibility and consistency and is essential for ANCAP messages.
- Consumers were ***‘turned off’*** airbags, following bad international press.
- Consumers were ***‘turned off’*** manufacturers who downgraded safety specifications.
- Consumers want ***positive messages*** of car safety performance to **reinforce** their purchasing decision.
- Fleet purchasing decisions ***will*** deliver rapid new car safety improvements by manufacturers.



1994



1995



2007



2012

Safer Drivers in Safer Cars on Safer Roads.

ancap.com.au