

NSW quad bike safety improvement program 2019 midpoint evaluation 2.0

Qualitative Report



instinct and
reason

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Reference:

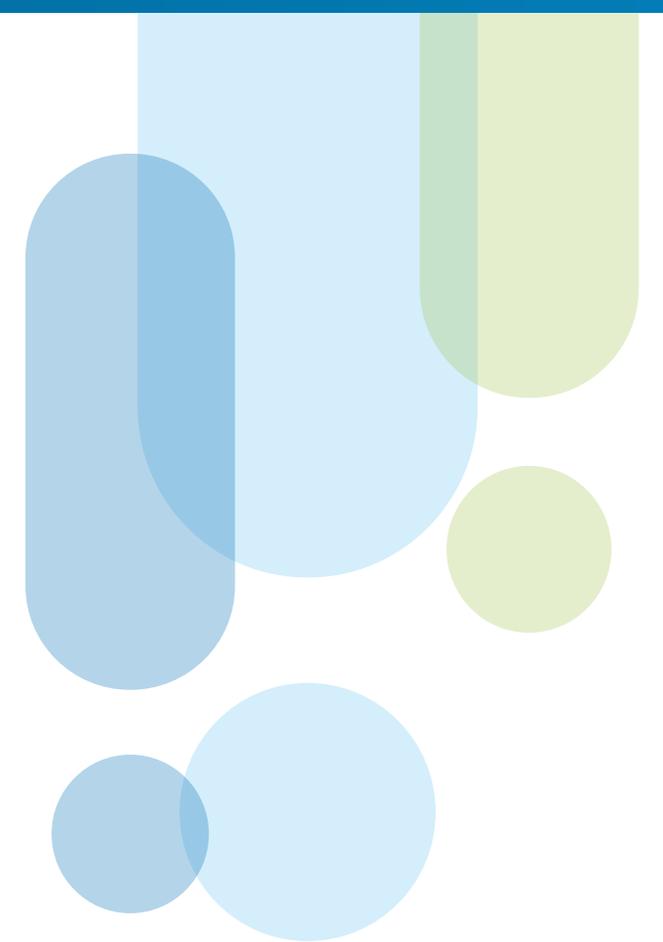
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Qualitative report contents

2019 Qualitative Quad Bike Evaluation Midpoint 2.0

1	Overview	Slide 3
2	Key findings	Slide 10
3	Detailed findings	Slide 16
3a	What hasn't changed among NSW Farmers	Slide 17
3b	What has changed among NSW Farmers	Slide 29
3c	OPDs are being mandated; and other PPE use is required	Slide 34
3d	How can we encourage seat belt wearing on SSVs?	Slide 42
3e	How can we stop children riding full sized quad bikes?	Slide 55
4	Conclusions & communications recommendations	Slide 68

1



Executive summary from the quantitative research

Summary

Increases SSV use and less QB use is occurring

Attitudes towards alternative safety options is improving, despite limited change in QB beliefs.

The awareness reach of the QBSI program across the farming sector is a success

Uptake intent for the quad bike modification program could reach 56%

SSV uptake is substantial and changing the way farm work is being handled. QBs are being used less frequently and more carefully and fewer are planning to replace them.

Attitudes towards QBs are not significantly changing, with high attachment to QBs, their own experience and mixed belief in OPD messages. Despite this, SSV purchases are up and QB are in decline as attitudes towards alternative safety options improves significantly.

There is successful reach of the QBSI program across the farming sector; 9 in 10 hear QB messages and are also aware of the program (to some degree), but only 3 in 10 have participated in the program to date.

Potential intention rises to 56% if modification of existing quad bike delivers all the initiatives tested at the optimal level, although consideration to a positive improvement for the top 3 drivers to the highest level will deliver 49% intention:

- Training provided for free with a written and visual training guide
- Knowing key safety statistics that most deaths caused by asphyxiation from a quad bike rollover are slow and painful
- Free cost of having a protection device fitted

Key take outs - Quad bike and SSV usage in NSW



SSV uptake is substantial and changing the way farm work is being handled. QBs are being used less frequently and more carefully and fewer are planning to replace them. There is a greater 'respect' for QBs in 2019.



Understanding the market: the current and changing behaviours towards use of QBs on NSW farms

Key points on Quad bike/SSV ownership and use

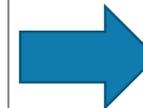
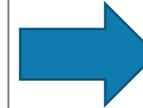
- **Increase in the ownership and use of SSVs, up 12% since 2017 and 20% since the programs inception.**
 - There has been a significant decline in the use of QBs (down 7% from almost universal use in 2017 to 87% in 2019).
 - Increase in use of SSVs across all farm activity types, particularly with maintenance work (+13%), inspecting property (+12%), carrying and moving tools (+11%), shooting & moving around the farm (+10% for both).
 - Downward trend in use of Quadbikes across most farm activities with mustering/moving animals down 8% since 2016; as is spraying weeds (down 7%).
- **Only 10% have taken QBs up in the last 10 years, falling from 21% having taken up QB use in 2016 in the last 10 years.**
 - Of those farmers with SSVs (now 43% of NSW farmers), 73% of have taken them up in the last 10 years and only 2% have been using them for more than 20 years.
- Over the course of the QBSIP's implementation, **there is a continued (and statistically significant) decline in the importance of QBs for the farm** (down from 77% in 2016 to 68% in 2019).
- Farmers agree that QBs are being used less (up from 24% in 2016 to 38% in 2019). These results are consistent across regions for Midpoint 2.0.

Accidents and near misses

- SSV presence on NSW farms has almost doubled in 3 years (from 23 to 43%) and results in a corresponding rise in one or more close calls or near misses (up from 12% to 19%).
- However the rate of QB reported accidents or close calls, despite declines in use and ownership, has trended up. Farmers in peri-urban locations report significantly less than other regions.
- More serious accidents that required medical attention has remained constant for SSVs despite a doubling of their presence in NSW and QBs serious accidents are trending down in line with reduced ownership and frequency of use
- Most safety behaviours are trending upwards, *not letting farm visitors use QBs is* (up 8% since 2017 to 72% agree).
- The belief that QBs can be dangerous is high at 91% of farmers
- The level of training provided for people working or using QBs or SSVs is also trending upward; with 51% of farmers now checking on QB experience (up 8%) and 46% limiting what they can do until they prove themselves (up 5%).
- They are also providing riding safety demonstrations (up 6%) and riding with new workers to check they can ride safely (up 6%). The unprofessional approach of having no training arrangements in place is down 8% to only 13% in 2019.
- Frequency of purchase among farmers for a new QB of SSV remains relatively constant since 2017.

Key behavioural shifts

- 1 Others wear helmets (+5%)
- 2 Keys removed (+6%)
- 3 QBs locked (+3%)
- 4 I wear a helmet (+2%)
- 5 No passengers (+7%)



Intention to buy a QB this year declined by about half in (from 15% in 2017 to 7%) and 20% are not sure if they will buy another QB (up 12% from '17). Peri-urban farmers are more likely to say they will never buy a new QB

Key take outs - Awareness & knowledge of farm safety options



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Attitudes towards QBs are not significantly changing, with high attachment to QBs, their own experience and mixed belief in OPD messages. Despite this, SSV purchases are up and QB are in decline as attitudes towards alternative safety options improves significantly.

Understanding the reasons: the current and changing behaviours, attitudes towards QBs and safety alternatives.

Key points on attitudes & perceptions

- **Attitudes towards health and safety on the farm** remain stable over the last 2 years, and largely across regions. Most agreement remains with the need for any help to keep insurance costs down.
 - Peri-urban farmers are more likely to agree that the chance of an injury on depends on both their ability and luck
- **Attitudes towards quadbike safety on the farm remain relatively stable**, but there are three shifts since 2017:
 1. Awareness that roll over and crush protection can make a QB more dangerous (+9%)
 2. Awareness that fitting roll over and crush protection will void the warranty (+7%) and
 3. QB accidents are attributed to speed and carelessness (+9%).
- Despite the increased awareness of anti OPD messages SSV purchases are up and QB are in decline.
- **Minimal change when it comes to what makes one QB safer than another.** Highest belief is with the lower centre of gravity (76% agree) and weight distribution (73% agree) as key factors. Peri-urban farmers tend to think having it well designed for carrying loads and spray tanks is a determining factor.

Key points on attitudes & perceptions

- Awareness of safety options significantly increased from 2017 for:
 - The idea of substituting a QB for a SSV (up 13% since '16),
 - Roll bar protection acts as a lifeguard (up 13%),
 - Using another vehicle when possible (up 7%)
 - The benefits of lightweight ventilated helmets (up 13%)
- Significant increase in those farmers who believe they have a strong knowledge of all the different options available (up 14%). 34% have had their opinion about SSVs changed for the better while 37% were always positive. Unfortunately 16% are more negative.
- The safety of SSVs is often stated as a key reason for having a positive change of mind on the vehicles, followed by their handling and convenience and having greater exposure.

Key attitude shifts

- 1 The idea of substituting a QB for SSVs (up 13% since '16),
- 2 Roll bar protection acts as a lifeguard (up 13%),
- 3 The benefits of lightweight ventilated helmets (up 13%)
- 4 Roll over and crush protection can make a QB more dangerous (+9%)
- 5 Fitting roll over and crush protection will void the warranty (+7%)
- 6 QB accidents are attributed to speed and carelessness (+9%).

Key take outs - Awareness & participation in the QBSIP

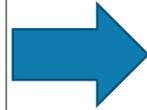


There is successful reach of the QBSI program across the farming sector; 9 in 10 hear QB messages and are also aware of the program (to some degree), but only 3 in 10 have participated in the program to date. While this isn't impacting QB attitudes significantly, there are strong indications of its impact through less use of QBs and greater SSV use.

← **Understanding the marketing:** the reach and impact of marketing activities

Awareness of the QBSI program

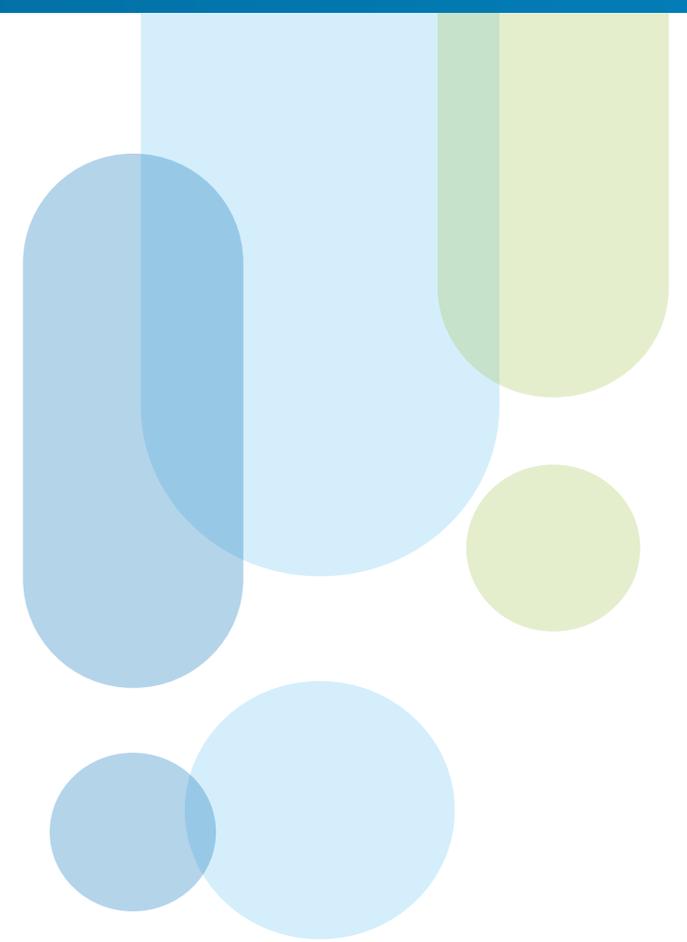
- **The advertising reach remain relatively successful, with broad reach of the QB safety promotions in all media at 87%** (although down 2 points since 2017).
- **The QBSI has achieved high levels of awareness** with only 12% saying they had no knowledge of it (88% aware). While 29% only knew some of the details, 12% were vague and 19% knew of it but didn't participate.
 - Newspapers, magazines and newsletters are the top awareness channels, although a significant rise in the use of events, field days and ag shows has occurred.
 - Nearly 3 in 4 farmers think the campaign advertising is good or very good, for its simple yet effective message.
 - Less than 1 in 10 thinking negatively of it, mainly for indifference to the message (not resonating).
- **However, only 28% of farmers in NSW indicate they have participated.** Some of them in multiple ways including 11% took the rebate for a SSV, 5% for QB OPD, 7% for the helmet and 10% for training.
 - Satisfaction in program application is fairly good at 73%, with communication the main recommendation for improvement while among those who were dissatisfied, more information is a clear need to be worked on.



What did they see

- 1 Safety/compliance info (24%)
- 2 Training/courses/conferences (21%)
- 3 Rebates (17%)
- 4 TV ads (13%)
- 5 News media ad (13%)
- 6 News article (12%)

2



Background, objectives and methodology

Background

Quad bikes are considered an important and popular piece of equipment for farmers. They are used for mustering, property inspections, weed control and maintenance work. Despite this, they pose one of the greatest threats in rural workplaces as the leading cause of fatalities. Since 2001, there have been more than 240 deaths across Australia involving quad bikes on farms. Consequently, the NSW Government introduced the Quad Bike Safety Improvement Program in 2016 to engage farmers in, and encourage use of, safe work practices that reduce Quadbike risks. The Program currently offers rebates that will give eligible farmers and their workers up to two rebates worth up to \$1000 each. There are five eligible safety solutions on offer as part of this rebate package:

- Up to \$1,000 towards the purchase of each side-by-side vehicle.
- Up to \$500 towards the purchase of each Quadbar™ Operator Protective Device (OPD) or ATV Lifeguard OPD.
- Up to \$90 towards the cost of each helmet compliant with NZS 8600:2002, AS/NZS 1698:2006 and/or UNECE22.05.
- \$500 for one drone.
- Free training places to complete Unit of Competency (UOC) AHCMOM212 - Operate Quad Bikes—a one day quad bike safety course tailored to the farming community. Eligible participants also receive a free compliant helmet.

Sept. 2019 Situation

In September 2019, a rapid follow-up survey with the farming community is needed to help provide a mid-point 2.0 assessment of awareness, attitudes and behaviours towards quad bikes and related matters following the introduction of the quad bike safety improvement program to reduce deaths and injuries on NSW farms. A key consideration of government is to minimise all 'access' impediments to make the program a seamless process.

We also acknowledge that there are new elements to **the Quad Bike Safety Improvement Program** itself that need to be tested for their ability to attract new quad bike users to the program, including the inclusion of free training with the two rebates doubled to \$1000.

Objectives

The overall aim for this research is understand and provide a mid-point 2.0 assessment on what impact there has been within the farming community since the introduction of the program which offers support to NSW farmers to undertake harm prevention activities associated with on-farm use of quad bikes through a small business quad bike safety rebate and training package.

More specifically, it is understood the objectives are to track:

- measures of awareness, attitudes and behaviours towards quad bike use and safety elements and to alternatives solutions – to be assessed against the benchmarks established in the last two studies
- awareness and knowledge of and engagement and response to the quad bike safety improvement program, its elements, associated safety messages and associated education and communication activity – again against measures established in the last two studies
- perceived effectiveness of the program, its elements, associated safety messages and associated education and communication activity
- segments where it has most impact and where it has had least impact
- (based on findings from the above objectives) potential adjustments that may be considered at this mid-point to enhance the programs impact.
- to test new initiatives that might make the program more appealing to farmers (such as the new drone element)
- to test new initiatives that will make the program more accessible to farmers (such as making the application process more seamless; enhancing access to up to \$2,000 rebate)

This evaluation aims to be both robust and comparable to the benchmark results in 2016 and 2017.

Methodology – overall



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Phase 1 – Inception and knowledge sharing

- An **inception and knowledge sharing** workshop was held in May 2019 with the communications team of the NSW Department of Finance, Services and Innovation and SafeWork NSW representatives to confirm the research design, timings, etc. The meeting also reviewed two draft choice models..

Phase 2 – Quantitative Recruitment 5 minutes

- **Phone recruitment was used to obtain the agreement from 400 farmers and family members to complete an online survey.** The recruitment screener ensured a mix of the target audience across different regional areas in NSW and provided preliminary profile data to be later combined and analysed with the online survey responses.

Phase 3 – Quantitative research (online survey) 20 minutes

- **The quantitative research is to establish robust measures/ scale of awareness, recall, attitudes and behaviour and how they may vary in impact across different segments of the target audience.** This included showing and exploring reactions to the various campaign elements. This approach maximised a mix of the target audience across different regional areas in NSW who were exposed to the campaign.

Phase 4 – Quantitative topline report

- To inform the design of the focus groups, a topline report of the survey findings will be developed, including an executive summary and initial findings supported by a detailed analysis of the survey results.

Phase 5 – Focus group discussions

- 6 focus groups will form the qualitative research that digs deeper into the ‘why’ behind the changes, the impact of program changes and potential improvements/modifications. This will enable us and SafeWork NSW to cost-effectively and in a targeted way explore more deeply any questions that arise from the survey and to understand the ‘why’.

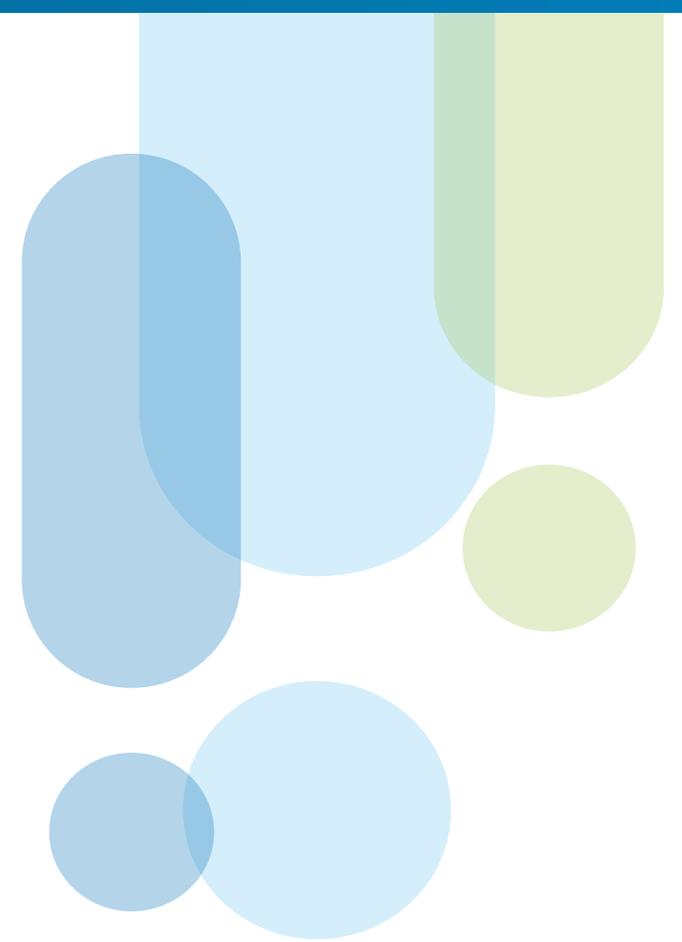
Phase 6 – Analysis and reporting

- **The final report will provide findings and recommendations from the analysis of the survey and qualitative results.** It is based on a four segment profiles from the Sheth-Frazier segmentation model and assessed according to the Rossiter-Percy communications model.

overall objective is to inform the campaign evaluation to identify what further behaviour change might be needed. In particular for SSVs/Seatbelts – what it would take for them to wear seatbelts? And for Letting kids under 16 use adult-sized quad bikes – manufacturers stipulate - do not let children under 16 from operate adult-sized quad bikes. What can we do to get farmers to stop letting kids on adult-sized bikes?

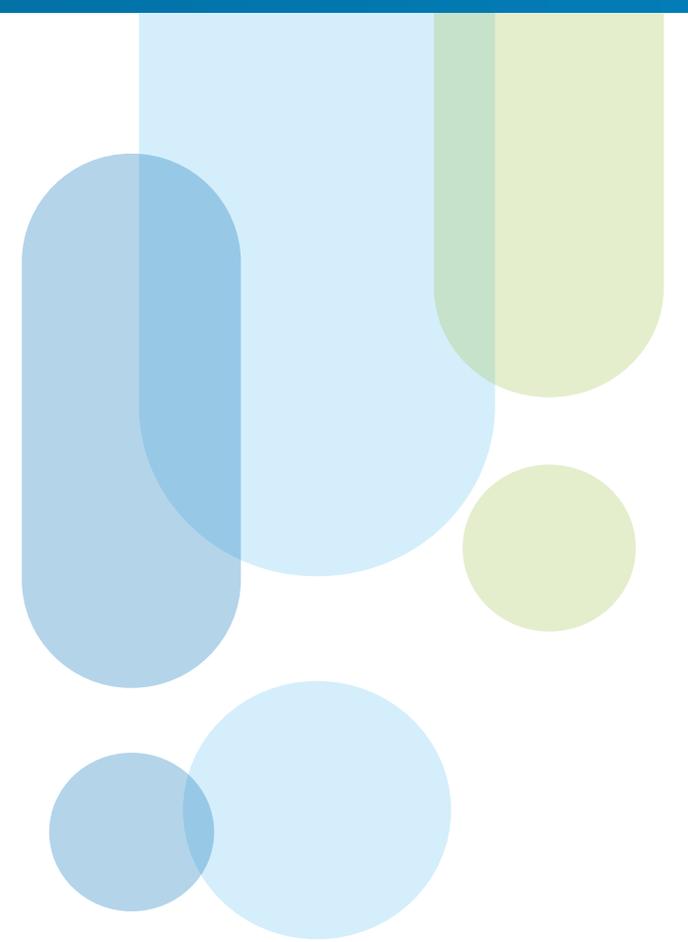


Detailed qualitative findings



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What hasn't changed?



The risk mind-sets of NSW farmers are basically unchanged

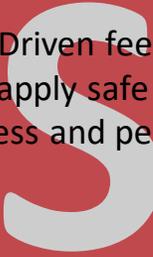
Fatalists – 28% (was 28% in 2016)

- Fatalists' main focus is getting the work done rather than being safe. Their mentality is "whatever will be, will be".
- They're not against safety measures but safety won't be a main driver.



Safety driven – 21% (27% in 2016)

- The Safety Driven feel strongly about safety and apply safe practices for both business and personal reasons.



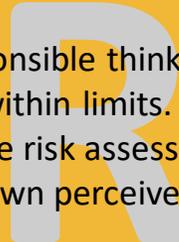
Libertines – 26% (23% in 2016)

- Libertines aren't consciously concerned about safety; they don't want government involved; they don't wear helmets; and wouldn't buy a quad bike with a roll bar.



Responsible - 25% (22% in 2016)

- The Responsible think quad bikes are safe within limits.
- They make risk assessments based on their own perceived ability.



The segmentation analysis based on attitudes to risk and their use of Quad bikes shows no significant change since the program began.

The largest segment is the '*Fatalists*' (28%). Their main focus remains on getting the work done rather than being safe. Their mind set is that "whatever will be, will be".

The '*Libertines*' (26%) are not consciously concerned about the safety of their quad bikes; they don't want government involved, they don't wear helmets and claim they will not buy a quad bike with a roll bar.

A further 25% are '*Responsible*'; this segment think quad bikes are safe within limits. They make risk assessments based on their perceived ability while be fully aware that their farm is a dangerous place. The remaining are the '*Safety driven*' (25%) who feel strongly about safety and apply safe practices for both business and personal reasons due to their recognition that the farm is a dangerous workplace and there are situation where they .

Profile of the 'Safety Driven' segment

21%

Demographics

- Uses or owns a quad bike and a articulated truck

Awareness/recall of program

- Associates Fire and Rescue NSW with NSW Quad Bike Safety Improvement program
- More likely to have seen the TV or Facebook video ad
- Heard about the Quad Bike Safety Improvement Program from newspapers, magazines or newsletters, events, field days or ag shows, television (news, announcement, program or ad or via farm or other organisations, networks or advisors
- Was inspired by the Quad Bike Safety Rebate to not let anyone u16 ride or be a passenger on a quad bike
- **Agrees:** if the rebate is applied at time of sale they will buy and use a lightweight helmet

General awareness of safety

- **Disagrees:** often pushes themselves to get the job done fast rather than taking full precaution, children will always need to use quad bikes

Attitudes/Behaviours

- Less likely to use a quad bike to carry and move an animal
- Believes a quad bike is quite important to their day to day operations on the farm
- **Agrees:** Always wear a helmet when using a quad bike; make sure that others on the farm always wear a helmet when using a quad bike; quad bikes are securely locked away when not in use; keys to quad bikes are removed when not in use; don't let farm visitors use the quad bike, making workplace safe includes children at a workplace, would use the seatbelt in a side by side
- **Disagrees:** allow passengers to be on the quad with the rider; there are times when dog/s are with them on the quad bike
- Always makes themselves, employees, adult family members, children u16 and adult visitors wear helmets when on riding a quad bike on their farm
- No one on their farm has experienced one or more close-calls/near misses with a side by side
- Children u16 on their farm are never allowed to ride adult quad bikes
- Hasn't bought but will buy/use lightweight helmets that are well ventilated/sun protection and a rigid or compression roll/crush bar (like Quadbar, flexi or Lifeguard), some have in the last year
- Ensures that themselves and employees on the farm wear a helmet when on a quad bike for more than a year
- Will offer quad bike training for others on the farm soon
- Hasn't let anyone u16 ride of be a passenger on an adult size quad bike in more than a year

Profile of the 'Responsible' segment

25%

<p>Demographics</p> <ul style="list-style-type: none"> • Have at least received a diploma 	<p>Awareness/recall of program</p> <ul style="list-style-type: none"> • Thinks the advertising is good • More likely to have seen the ad in The Land newspaper • Heard about the Quad Bike Safety Improvement Program from newspapers, magazines or newsletter (articles, announcement or ad), events, field days or ag shows, via farm or other organisations, networks and advisers or radio (talk back, news, announcement, program or ad)
<p>General awareness of safety</p> <ul style="list-style-type: none"> • Believes having roll or crush protection makes a quad bike safer • Disagrees: whether they get injured at work depends on their ability, children will always need to use quad bikes, have heard that roll over/crush protection can make quad bike more dangerous 	<p>Attitudes/Behaviours</p> <ul style="list-style-type: none"> • Less likely to use a quad bike to inspect their property • Are less likely to believe that a quad bike is highly important to their day to day operations on the farm • Agrees: they are using their quad bikes less than they used to; there are times when dog/s are with them on the quad bike, quad bikes are becoming too powerful and centre of gravity is higher, would consider having roll over/crush protection attached, roll over/crush protection should be art of package when buying a bike, want to find ways to make the quad bike safer • Disagrees: they prefer to use the quadbike rather than any other vehicle on their farm; quad bikes are securely locked away when not in use; keys to quad bikes are removed when not in use • Has fitted a rigid or compression roll/crush bar (like Quadbar, flexi or Lifeguard) more than a year ago • Hasn't let anyone u16 ride of be a passenger on an adult size quad bike in the last year

Profile of the 'Fatalists' segment

28%

Awareness/recall of program

- Less likely to have already participated in the NSW Quad Bike Safety program or received the rebate towards a helmet
- More likely to have seen the ad in The Land newspaper
- Heard about the Quad Bike Safety Improvement Program from newspapers, events, field days or ag shows, television (news, program or ad) or via farm or other organisations, networks and advisors

General awareness of safety

- Believes that having a quad bike designed to safely carry equipment and loads makes it safer than others
- **Agrees:** often push themselves to get the job done fast rather than taking full precaution, something will eventually go wrong, whether they get injured at work depends on their ability

Attitudes/Behaviours

- **Agrees:** They prefer to use the quad bike rather than any other vehicle on the farm; allow passengers to be on the quad with the rider, any help keeping insurance costs and exposure claims down is valued, would be great to have quad bikes on the market that are built for farm work, would consider having roll over/crush protection attached, roll over/crush protection should be art of package when buying a bike, children will always need to use quad bikes, want to find ways to make the quad bike safer
- **Disagrees:** Always wear a helmet when using a quad bike
- Never makes themselves, adult family members, adult visitors or children u16 visiting the farm wear a helmet when riding a quad on their farm
- Children U16 on their farm are taught to ride quad bikes gradually from a young age
- Hasn't fitted but thought about a rigid or compression roll/crush bar (like Quadbar, flexi or Lifeguard) and not letting anyone U16 ride of be a passenger on an adult size quad bike
- Hasn't thought about offering quad bike training to others on the farm or substituting the use of a quad bike for a side by side vehicle

Profile of the 'Libertines' segment

26%

<p>Demographics</p> <ul style="list-style-type: none"> • More likely to own two articulated trucks 	<p>Awareness/recall of program</p> <ul style="list-style-type: none"> • Less likely to think that the advertising is good • Heard about the Quad Bike Safety Improvement Program from newspapers, magazines or newsletter (articles, announcement or ad), events, field days or ag shows or via farm or other organisations, networks and advisers • Disagrees: if the rebate covers the purchase price or is applied at time of sale they will buy and use a lightweight helmet, if the rebate is increased up to \$600 or applied at the time of sale towards an OPD device they will buy and use a quad bike roll/crush protection device, if the rebate is increased to \$2000 towards a vehicle or applied at time of sale they would buy and use a side by side vehicle • Generally remembers something like the ads shown but can't recall anything specific
<p>General awareness of safety</p> <ul style="list-style-type: none"> • Believes nothing would make a quad bike safer • Agrees: allow passengers to be on the quad with rider, don't think their job will have a negative impact on my health, have heard that roll over/crush protection can make quad bike more dangerous 	<p>Attitudes/Behaviours</p> <ul style="list-style-type: none"> • Less likely to use a side by side to muster/move animals and providing feed • Believes a quad bike is highly important to their day to day operations on the farm • Disagrees: they are using their quad bike less than they used to; make sure others on farm always wear a helmet when using a quad bike; quad bikes are securely locked away when not in use; keys to quad bikes are removed when not in use; quad bikes usually need some modifications to be used effectively on a farm, often push themselves to get the job done fast rather than taking full precaution, something will eventually go wrong, whether they get injured at work is mostly a matter of luck, quad bikes are becoming too powerful and centre of gravity is higher, would be great to have quad bikes on the market that are built for farm work, would consider having roll over/crush protection attached, roll over/crush protection should be art of package when buying a bike, aware of obligation in WHS legislation to ensure safety of persons at work, making workplace safe includes children at a workplace, want to find ways to make the quad bike safer, would use the seatbelt in a side by side • Never makes adult family members wear a helmet when riding a quad bike on their farm • No one on their farm has experienced one or more close-calls/near misses with a quad bike • Have had one or more close calls/near misses wit ha side by side vehicle on their farm • Hasn't bought or thought about buying/using lightweight helmets that are well ventilated/sun protection or a rigid or compression roll/crush bar (like Quadbar, flexi or Lifeguard) or a side by side vehicle/any other substitute vehicle • Indicated that their negative attitude of side by side vehicles hasn't changed in the last 12 months

Broad Quadbike safety strategy needs to remain multi-pronged

The safety driven require a **reinforcing** strategy

- That encourages the purchase of safer vehicles
- The wearing of PPE
- Training of all users and proper supervision
- Promotion of rules and regulations

R

Responsibles will be drawn to initiatives that **facilitate** safety in their workplace

- So rational arguments about young people on full sized quad bikes will resonate.
- They will support laws, regulations and enforcement of sensible rules

S

Libertines need to be **confronted** that QBs are dangerous PLUS they cannot control every safety threat

- Without this they will resist the need for safer vehicles, PPE, Training and supervision
- They will continue to allow children to rides QBs and refuse to wear seat belts in SSV

L

Fatalists must be **persuaded** that quad bikes are dangerous

- Without this they will resist the need for safer vehicles, PPE, Training and supervision
- They will continue to allow children to rides QBs and refuse to wear seat belts in SSV

F

Other contextual insights

SSVs are gaining popularity

- Those who have side-by-sides are happy with them and believe they can do everything a quadbike can do and more (more space to carry equipment, animals, people etc.).

SSVs are being considered

- Some people said they'd consider an SSV next time they were looking at a new quadbike, but price was still an issue with people citing a figure of around \$24,000 to get one equivalent to a decent quadbike. The incentive was seen as generous but not enough to trigger an immediate purchase

Do as I say not as I do

- SSV owners were not likely to use the seatbelt because it was a nuisance and impeded their work. They knew they should, however. They did acknowledge a need for any passenger to wear a seat belt though because "if they're not hanging on they could fly out")

Response to training is split

- Some who had received training said it was good and they (and their sons) had learnt something new
- Others talked about it as a waste of time and money and referred to the EPA-related training that was conducted by people who were clueless and inexperienced, and it was really just a way to pay for a certificate. They thought quad training would be the same. [testimonials should be distributed]

Prioritising the on-going strategy

Government subsidies for safer vehicles (SSVs), PPE, training and potentially some new areas :

- (1) How best to supervise QB users
- (2) Communications (including PLB and EPIRBS) and
- (3) Technological control of speed and use
- (4) Use of drones as alternatives to QBs for some tasks

Promote subsidies on safety initiatives (SSVs, helmets and training)

The subsidies turn the program into a partnership (people defend it)

Work to raise awareness that the QB is the source of greatest threat

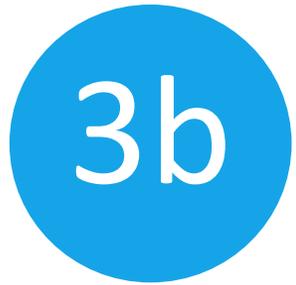
Data driven statistics
To set the scene –
Farmers are now more open to the messages

Work to persuade farmers that not all threats posed by QBs can be managed based on skill and experience

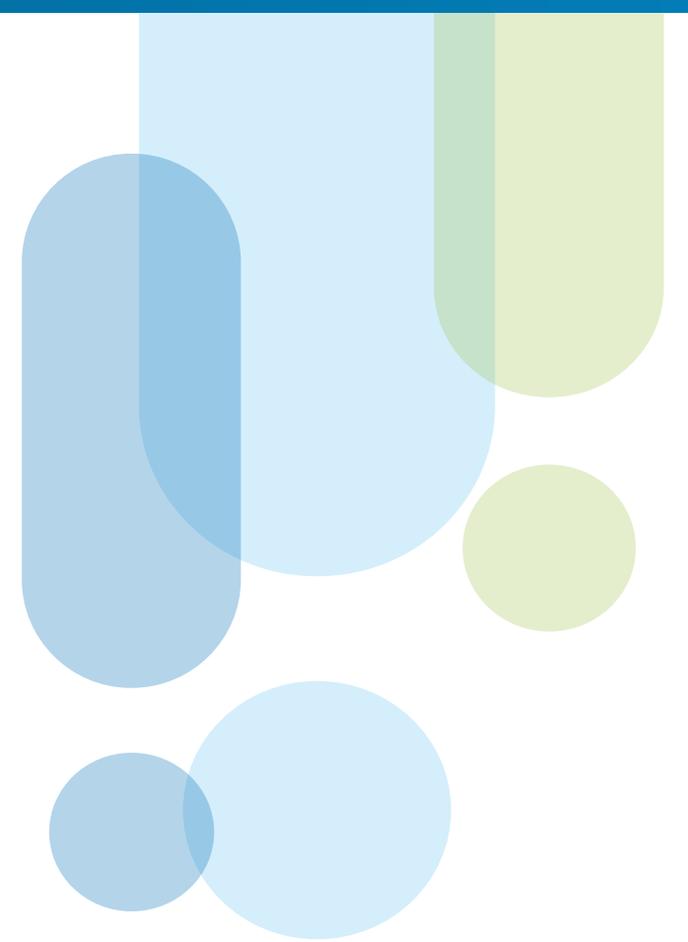
Communications around smashed vehicles (leave the rider story to the imagination)

Consider communications:

- Who is driving the QBSIP?
- How big is the problem?
- What do I do about it?
- Focus on the broken quadbikes (force them to realise bad things can happen)
- Focus on the skills needed to survive (force them to question their ability)
- Leverage key influencers (partners & children)



What has changed?



What has changed?



NSW farmers all have stories of themselves and other farmers doing stupid things including taking kids on the bike. Many wanted that stopped. There is an even split on whether a child should be allowed anywhere near the quadbike



Overall there has been a change of attitude and greater awareness of the dangers of quad bikes. There were fewer arguments that it was just the young, stupid, hobby farmers having accidents

SR Ensuring quadbike use is safe is on the rise. It's reflected in changed quadbike on-farm use, training, interviewing staff before allowing use. More realised they could 'lose the farm' by not providing helmets, training, roll bars etc They've started paying more attention to the issue



Many farmers have purchased SSV for multiple reasons with safety being one of the key ones



One SSV owner reckoned he was getting 20% more productivity from using an SSV. When mentioned to other farmers they said they'd like to see his reckoning. Productivity was seen as a huge issue.

Quadbike importance and use are both dramatically down

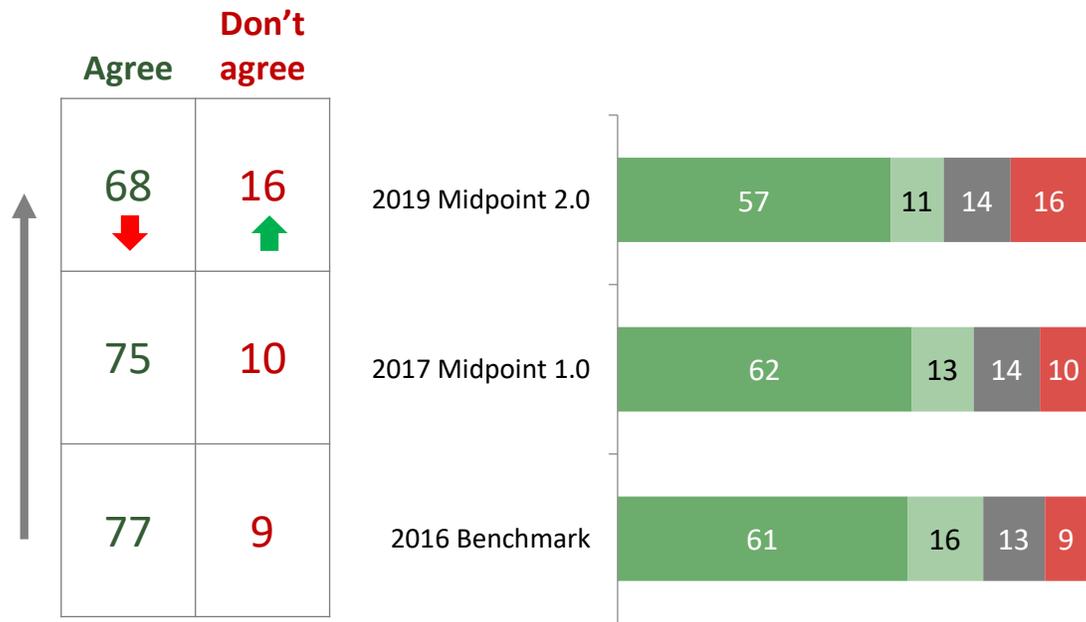


instinct and reason

While the importance of Quadbikes to NSW farm use has changed

Importance of QBs to the farm

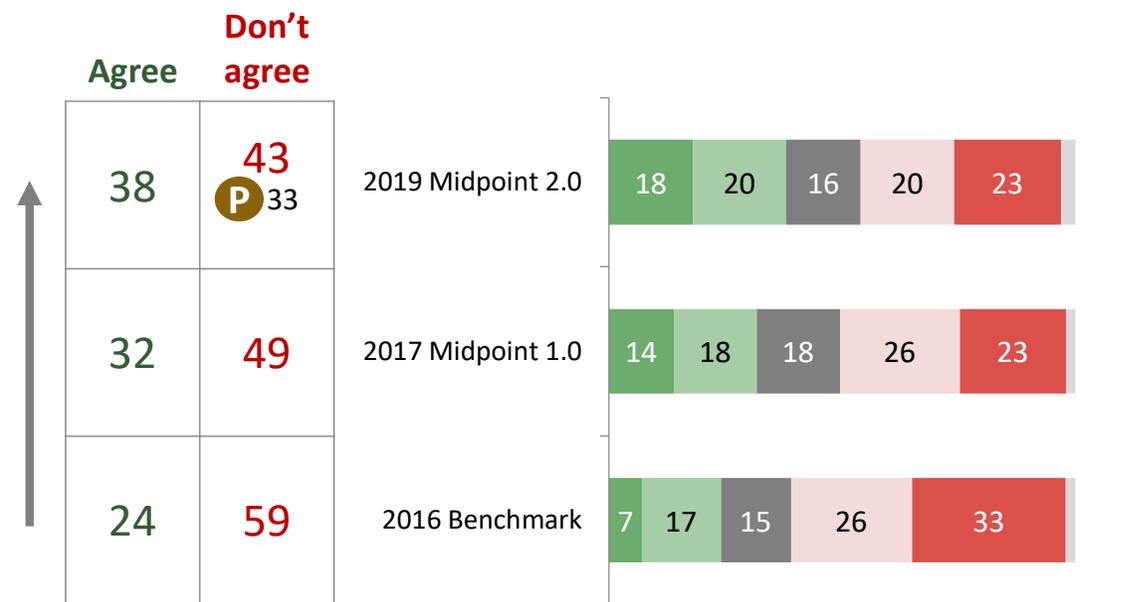
%



NETT Very High NETT Quite NETT Neutral NETT Low Don't know

Are Quad Bikes being used less

%



Strongly agree Agree Neither Disagree Strongly disagree Don't know

QA4. Please indicate the importance of a quad bike for the farm?

QA6. How strongly do you agree or disagree you are using quad bikes less now?

Base: Total sample 2019 Sept n=439, 2017 n=413; 2016 n=446

Significance Testing

If significantly more or less than 2017 (95% confidence)

If significantly more or less than the norm (95% confidence):

P Peri-urban
R Regional/ Rural
M Remote

Most NSW farmers believe that something has changed (1)



instinct and reason

NSW farmers now believe

Greater respect for QBs: that they can be dangerous (although most still want to attribute that to poor quality riders and being used inappropriately)

Salience of QBs: definitely being used less through more judicious tasking and buying SSVs which is a new trend.

Safety is more important: There is a general focus on being safer and more responsible and most farmers agreed safety behaviours are trending upwards ...including riding safety demonstration, riding with new workers to make sure they have skills, locking away keys, making QBs inaccessible to risky users etc

Training is more acceptable particularly for young people and young workers

Drivers of change were greater awareness of QB threat, seeing many users especially corporates buying SSVs, rising concern that it's a workplace issue making farm owners vulnerable, leadership being shown by corporate farmers.

Barriers Few were aware that the Farmers Federation was involved in driving change, many thought inappropriate rolls bars were to be mandatory (again misinformation is rife and likely deliberately being fed to farmers through retail networks from manufacturers.

NSW farmers are divided on

Salience of QBs: while most NSW farmers thought QBs were being used less through more judicious tasking and buying SSVs some thought that 43% having a SSV was *"on the high side of reality"*. And that their presence on NSW farms has almost doubled in 3 years was also rejected by some who just didn't see that many around. [Sales data might be needed to prove that NSW farmers are flocking to SSVs and normalizing this as a mainstream farming plant strategy].

Many still see SSV for older farmers and not for themselves.

Decline on QB use: Some were unsure whether QB use had declined simply that more people has SSVs *"it's horses for courses"* rather than QB use being down.

Decline in QB importance: this idea was rejected by a substantial proportion of NSW farmers. For many, the QB represents a potent workhorse, that they are very familiar with struggle to see how so many people are being injured by it. *"It's a darn sight less dangerous than a horse ... is that what they want us to go back to?"*

NSW farmers don't believe

Quad bike accidents or close calls has trended up: While some agreed most didn't that this was true. It caused participants to question many aspects surrounding the push for a shift away from quad bikes including:

- Why was the government pushing for this?
- What were the real numbers? How many are killed and injured?
- How critical is the QB safety issue (compared to other safety problems on farm)
- Who was being injured? (old or young, experienced or inexperienced; rural dweller or visitor; taking risk or using carefully?)

Key barriers to believing:

- Believe they need quad bikes
- Believe in some form of conspiracy to deprive them of Quadbikes
- Believe that they should not have rules imposed on them
- Believe that workers will reject requirements for PPE, training and supervision
- Believe that safety is a personal choice.

Most NSW farmers believe that something has changed (2)



instinct and reason

NSW farmers now believe

QBs accidents trending down in line with

reduced use: Most thought this made sense and reflected the rising respect for the QB as a danger to its users

Serious accidents that required medical attention remaining constant despite more SSV:

This also made sense to most NSW farmers because they said it was the older farmers buying them (and there are plenty of older farmers) and with the bigger tray they can be more useful to carry a lot of gear, good when you have kids as well – in many situations SSV are really useful

Having / doing no training is down: Virtually everyone agreed with this. The idea of doing nothing about quad bike safety is no longer a NSW farmer norm. Most would resist this as an idea.

Increase in use of SSV is up across all farm activities: this makes sense to most people because there are more of them so they are being used more. Most agree there are some tasks they are much better suited to than Quadbikes. SSVs particularly valuable for two person tasks.

NSW farmers are more likely to have a portfolio of **vehicles that they use. Quadbikes are used more judiciously because they can be dangerous.**

NSW farmers are divided on

Downward trend in uses such as mustering/moving animals and spraying weeds. Some resisted this fact on the basis that this is core to why they would use a quad bike and just couldn't envisage mustering or spraying on an SSV. [Potentially showing SSVs being used in this way would give some NSW farmers some new ideas]

Awareness of QBSIP at 61%: was generally supported by those aware of the program and not by those unaware

Downward trend in new QB purchases was widely disputed and put down to the impact of the drought across NSW. Many farmers claimed the numbers would bounce back when the rain came again. This was a temporary aberration.

Many but not all will accept a OPD is it comes with the bike as standard ... those that don't like it will cut it off ... others will modify it using it as a valuable storage anchor point and others will just use it as intended

NSW farmers don't believe

Don't believe:

- That SSVs are *"as handy as Quadbikes"*
- Not as maneuverable
- Not as able to get into rough country
- *"For older people"*
- *"Basically it's a golf buggy"*

Insights that could be leveraged for communication activity (1)



Some NSW farmers are reluctant to report quad bike injuries

- Some NSW farmers recognise that QBs are business plant are that any injury on one opens them up to SafeWork scrutiny (even for their own children)
- Some farmers reported they have misled doctors about quadbike injuries. *“Instead, we said the child fell out of a tree”*. As a result, injury figures for quad bikes are probably under-stated. These farmers hold the view that their land their rules
- Some suggested that SSV accidents were NOT being recorded or recorded as quad accidents

You’re on four wheels and that allows you to look around

- “in a way a QB is like being on a horse ... you can meander along checking the fences and looking at your animals [and what they don’t say is watch where they are going]”
- In contrast on a two-wheeler everyone acknowledges you have to watch where you are going

Almost every QB danger claim is disputed

- Confirmation bias is strong here. Farmers only pay attention to information that confirms their position that quadbikes are safe unless you are inexperienced, stupid or inept (and they aren’t)
- They dispute everything that challenges this position. Making broad based advertising ineffective for those with this view

Roll bars not only wont work, they are positively dangerous

- This comes from a belief that the OPD will be a roll cage that will not allow a rider to escape
- This is clearly misinformation and needs to be stopped
- *“Unless you are wearing a seat belt a roll cage will kill you and you would never wear a seat belt on a quad”*

How does the OPD as proposed actually work

- NSW farmers are looking for details as to how the OPD protects them. Under what circumstances will it and wont it? How and where was it tested? Can they see the results?
- While there is some skepticism, many NSW farmers are genuinely interested in how the OPD will operate [many we believe would answer the call to be part of a trial of the new OPD to see if improvements were possible and potentially to adapt it for various country types and farm uses]

Insights that could be leveraged for communication activity (2)



instinct and reason

Ways quad bikes are used are frightening

- Some NSW farmers reported innovative and very dangerous ways of using quad bikes. *“well three of us go shooting on the quad – one riding, one spotting and one shooting ... I guess it’s a recipe for disaster but it’s a hell of a lot of fun”*

Quad bikes are modified making them more dangerous

- The first thought for many with the OPD was how could it be used as an adjunct to the needs of farm work. NSW farmers will look to make use of this extra solid component in many ways. [Communications about what is safe to do with the OPD and what isn’t will get the attention of farmers]

Quad bikes are repaired

- There are many quad bike incidents (potentially thousands in NSW every year) and many result in a quad bike being repaired. [There may be interesting stories coming from the smashed quadbike that might better communicate the many and varied ways quadbikes cause injury – focus on the bike and less on the person and the emotional barriers are removed]

Safety training is done for unusual situations

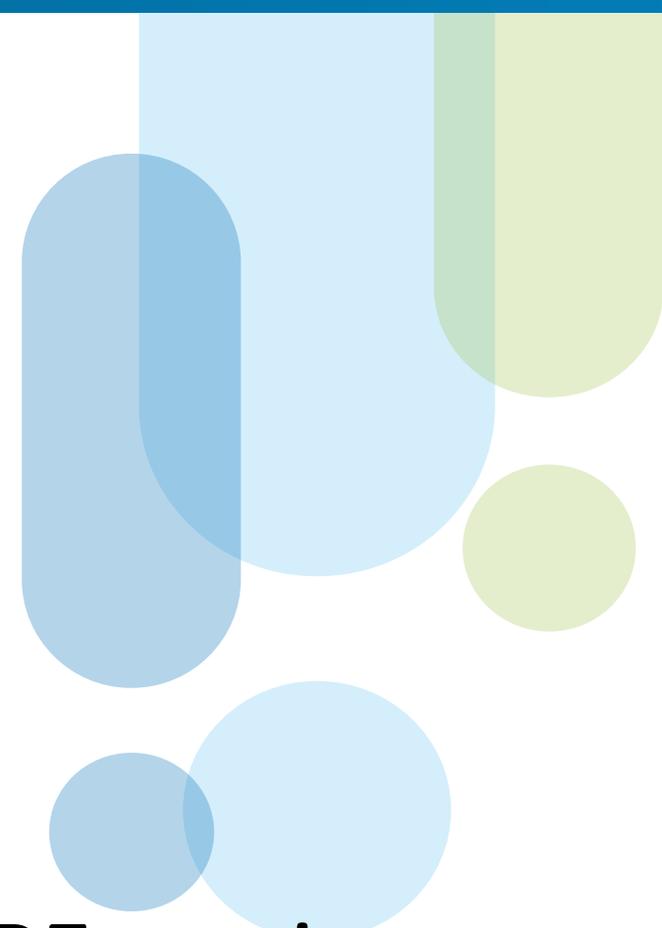
- Communications have typically focused on the accident which invariably raises questions about the authenticity of the communication. They don’t believe the story is true and see these communications as propaganda. *One participant working in a highly dangerous field spoke about safety training for being upside down in water. It’s harder than you think to get out. Some blokes try 10 times and they still can’t release the seat belt.* [Communications could focus on difficult situations where the quadbike has pinned the rider and ask the question or provide solutions]

The coroner is driving the issue

- NSW farmers tend to believe it’s the *‘government’* that are pushing the Quadbike issue for reasons most farmers can’t articulate [again this seems to be deliberate misinformation via retailers].
- Referencing the coroner as a key player shifts the conversation significantly to a genuine desire to know why. Pointing out the Farmers Federation involvement based on this being the most important safety issue on farms cements desire for more knowledge [followed by chain saws which resonates]



OPDs are being mandated; and other PPE use is required



OPDs are being mandated



Few are aware

- The qualitative work revealed that few NSW farmers were aware of the Mandated OPD October decision
- Those aware were convinced that roll bars were being mandated
- Those aware were convinced this was a government driven initiative

Massive lack of awareness of the truth about OPDs

Some important questions that need to be answered

- The sources of the push for change needs to be communicated
- The Coroner as a driver of change was well accepted (believable and trusted)

Coroner's motivations are trusted

The actual mandated OPD is much more acceptable to farmers

- The actual OPD proposed needs to be actively communicated. A PR action here is very important
- Misinformation is rife

Show the OPD

There are still some important questions on farmers minds

- What actually kills people (and badly injures them)?
- How will the OPD actually help me ... in what situations does it help? ...what situations wont it help?
- Show me the physics of the roll over and how it helps

Show me the physics

What kinds of messages resonated for the OPD?



The following messages resonated with NSW farmers. The combination of the messages below made a significant difference to acceptance of the mandated OPD. Interestingly a significant number said well if it comes with the bike so be it. It seems a reasonable proportion will accept the change as being something for the better. The messages below will cement support for the change. Low hanging branches is the main reason people thought they would need to use a quadbike (even SSV converts mentioned this) and this was also the reason given for not getting a roll bar fitted on a quad.

- Level 6
- Level 5
- Level 4
- Level 3
- Level 2
- Base level

The mandated OPD is the single bar; it will come with the new QB (no need to install)

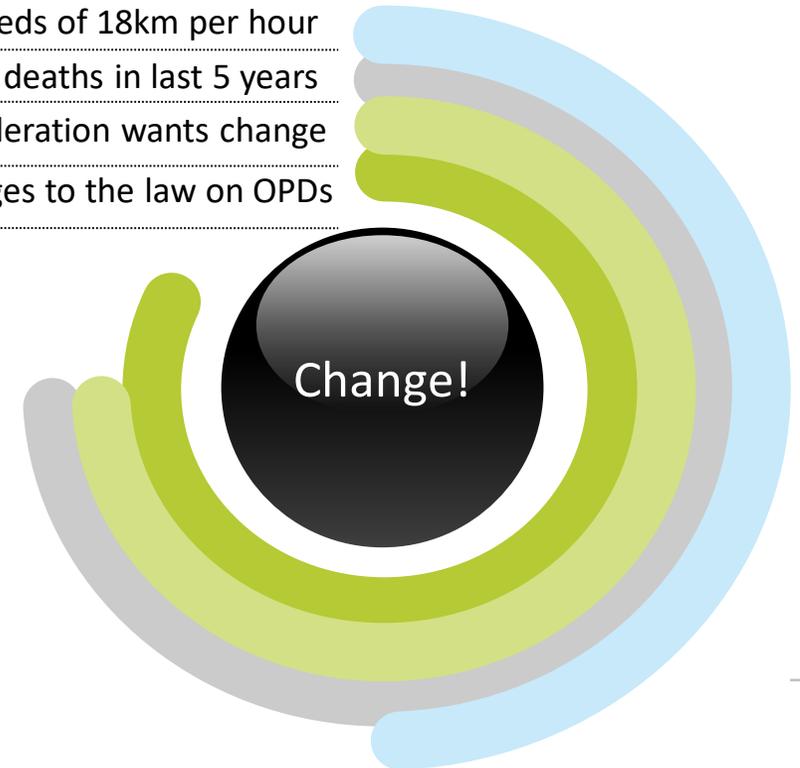
It's the average everyday farmer who is injured

Most accidents are farmers who die in late afternoon at speeds of 18km per hour

Define the size of the issue: 140 deaths in last 5 years

QB injuries/fatalities are main cause of on-farm accidents. Farmers Federation wants change

Coroner is so concerned they have agitated for changes to the law on OPDs



More PPE use is required



The slowly developing training requirement

- Will probably continue with training being provided
- It is in this environment that messages about PPE should be heard
- New helmets should be promoted
- The benefits of wearing them explained

Training culture is slowly emerging, this opportunity for PPE education should be used

Prima facie NSW farmers don't want to wear the helmet

- It's too hot; It's too uncomfortable
- It's not the social norm (usually this is unsaid but is definitely a key factor). Wearing a helmet is not the social image farmers want to project. An Acubra does.
- Helmets were still not popular but more open to wearing them when heard about the helmets that were light weight and ventilated. A number of people said they would investigate this following discussion

Farmers and farm workers hate wearing helmets

They will make the children wear helmets and attempt to make their workers wear them

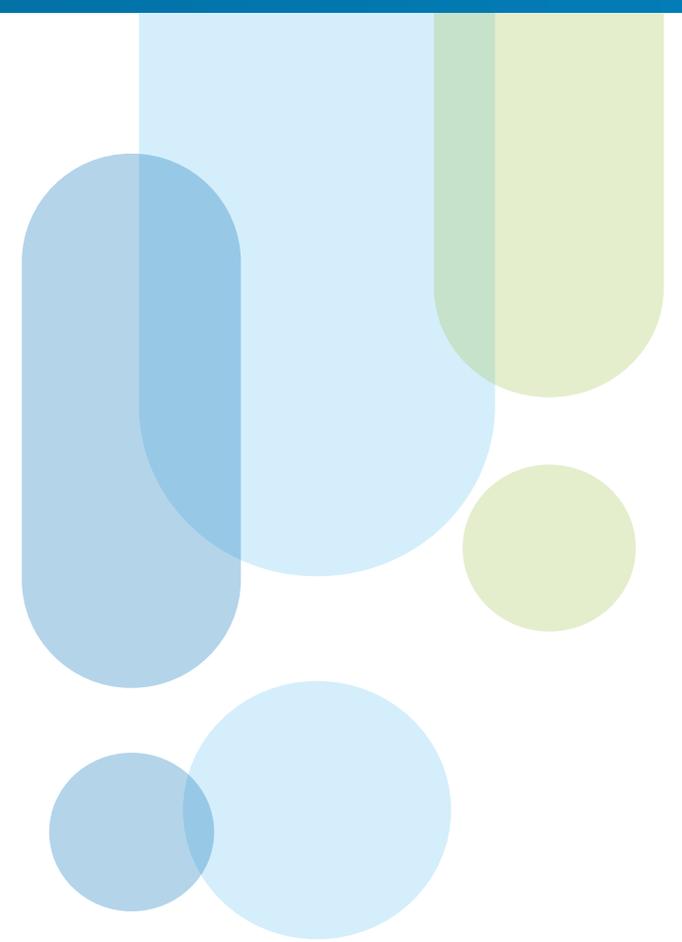
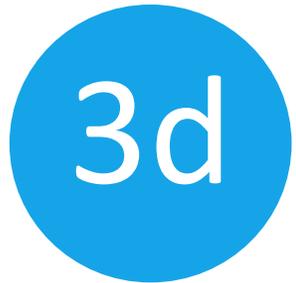
- Interestingly they have absolutely no issue with making their children wear the helmet and will make reasonable efforts to get the workers to wear them.

Farmers are poor role models

Corporate farmers are leading the way

- Most NSW farmers were aware that corporate farms insisted on wearing PPE and that workers there did what they were required because it was a dismissible offence
- Some farmers said it would be easier for them if the wearing of helmets was enforced.

Farmers would accept enforcement measures put in place



How can we encourage seat belt wearing on SSVs?

Wearing seat belts in SSVs



Most know you need to wear seat belts for full safety benefit

- This is one issue that doesn't require a lot of knowledge transfer.
- All users and potential SSV users understand that wearing the seat belt is essential in a rollover
- This is why, if a child is in the vehicle, they will insist on the child wearing the seat belt

Be a better role model

Yet many don't

- The reason given is that they are in and out of the SSV so frequently the seat belt gets forgotten after awhile
- The habit of fixing the seat belt needs to be established
- They make children wear the seat belts (acknowledging the need) yet don't wear them themselves.

Bad habits are accepted

Many are also modifying their SSV

- By removing the doors and netting that is designed to keep them in.
- All things add danger to the SSV
- More information about the impacts of this behaviour are needed

Adverse impacts of modifications need to be promoted

Most simply accept there is no chance they will wear a seat belt

- "It just won't happen"..."It's as simple as that"
- Yet they would be much more likely to buckle up on the road because many have experienced a fine. The enforcement strategy works on public roads and should be considered for the on-farm environment

This will be a challenge to change existing attitudes

What kinds of messages will get seat belts used in SSV?



The wearing of seat belts will be challenging. Obviously making the case for the consequences of not wearing seat belts in SSVs is crucial but also is recognising that a new habit needs to be formed and then attitudes will follow. Given the hardened attitudes, enforcement should be considered. Either SafeWork prosecutions of farmers who fail to insist on seat belt wearing when it leads to a workplace injury, or police on-farm issuing penalties. Change is unlikely without an enforcement element.

Level 6

Make it a habit

Level 5

The excuse of getting in & out doesn't wash – examples of couriers, taxi drivers etc. – they swear seat belts

Level 4

Communications that reflect the powerful impact of role modeled behaviour (kids copy you)

Level 3

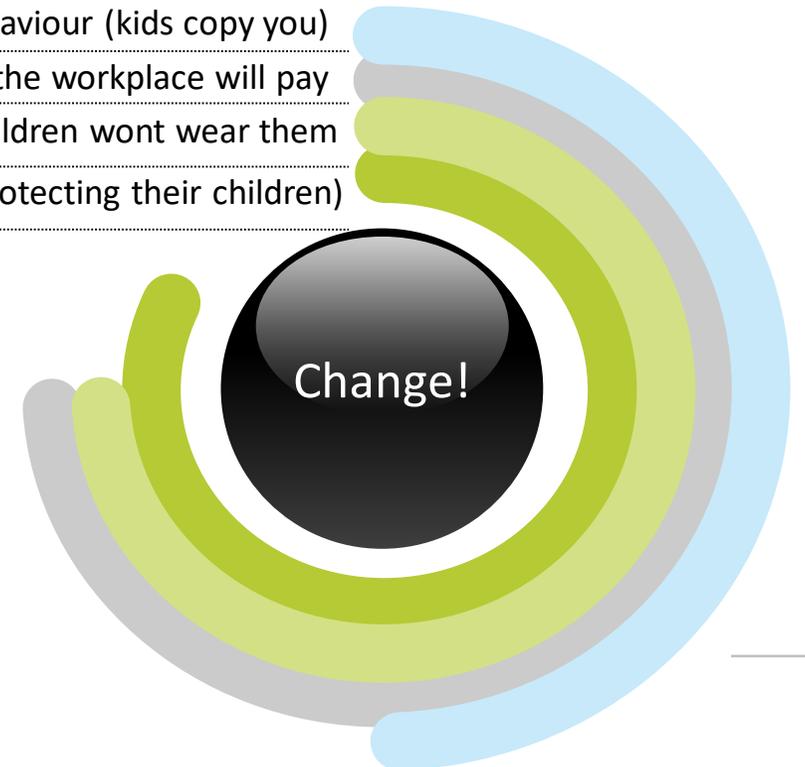
If a worker gets injured not wearing a seat belt the workplace will pay

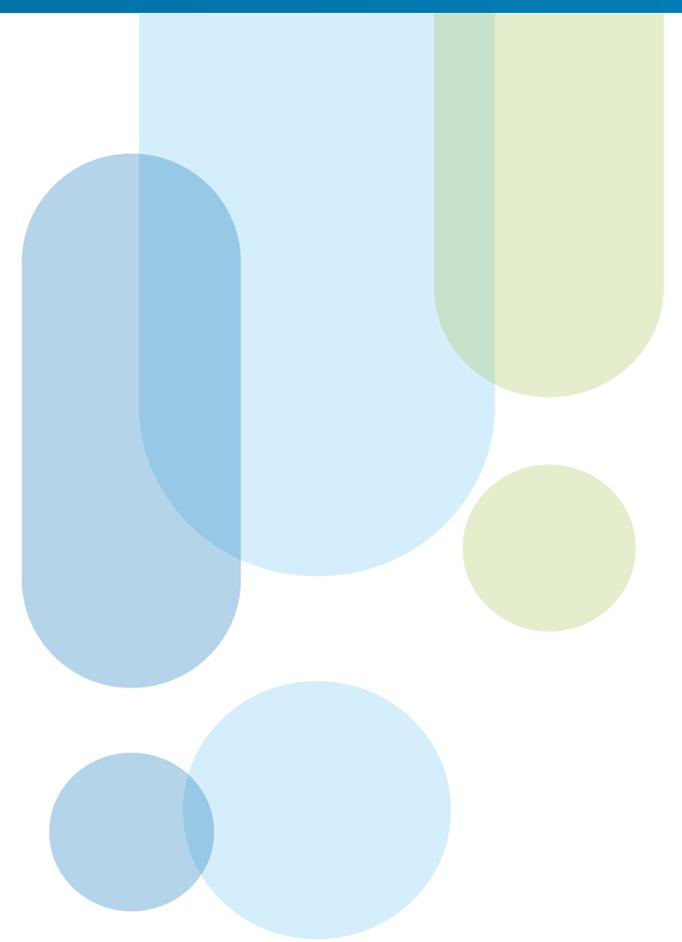
Level 2

Wearing seat belts is a habit – you need to **be a good role** model or your children wont wear them

Base level

Appeal to emotional need of belonging (about proper care, concern, protecting their children)





How can we stop children riding full sized quad bikes?

Farmers see many reasons for children to use quadbikes

Almost a rite of passage

- Many participants recalled starting on quadbikes at a very early stage (5 and 6 years of age)
- They recalled the use of quadbikes fondly
- It was when they started contributing to the running of the farm
- Its use made them feel valuable on the farm

Rite of passage

Quadbikes are fun and it will be hard to keep children away from them

- Quadbikes are recreational vehicles that provide speed, a thrill as well as being incredibly useful
- Most participants reject the idea of giving the keys to the quadbike on a child's 16th birthday
- They insist their children need training, supervised and a gradual development of skills (probably starting at 14)

Quadbikes are fun – they are a magnet

Provides children with a sense of independence and responsibility

- Without access to quadbikes children will be limited in what they can do on farm
- It is seen as having a cost as young people use quadbikes to contribute

Quadbikes let children participate in the life of the farm

The right training and supervision means they're OK

- Most believe that with the right supervision and training children are OK on quadbikes.
- It is something that parents want to give/experience with their children – the development of skills and expertise

I can make it safe for them

What kinds of messages will keep children off full sized quad bikes?

The NSW farming community dislike change for the sake of change. And so, at the present moment, probably around half of the NSW farming community is opposed to this measure. They can't see that the case has been made for an arbitrary 16 years and under ban and that it is being applied universally.

Level 6

Even the manufacturers agree quadbikes can't be ridden by children

Level 5

Offer solutions – i.e. use of smaller quadbikes, 2-wheelers

Level 4

Show how children struggle to control quadbikes (provide proof points)

Level 3

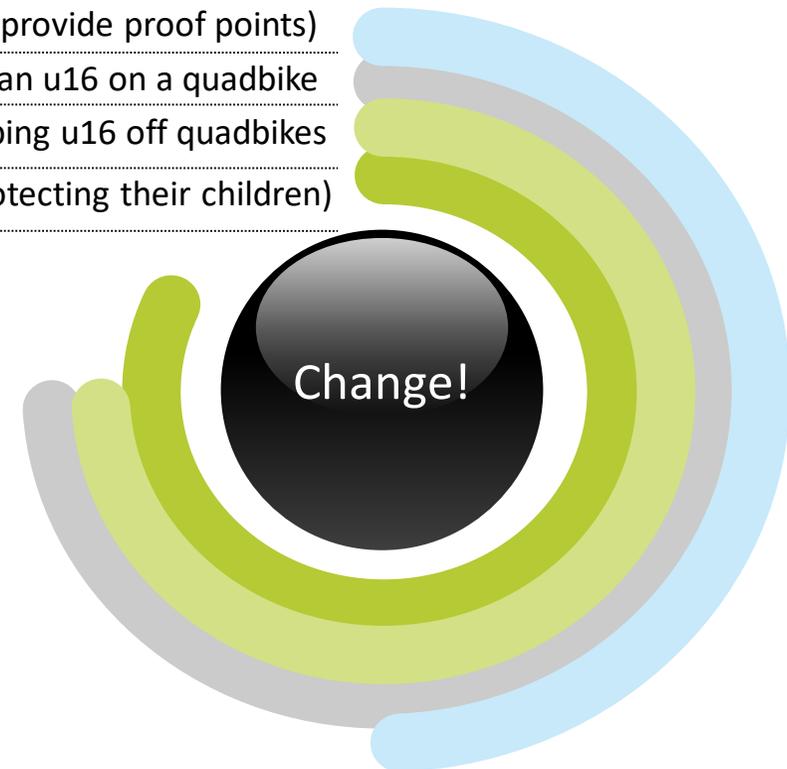
Caring parents would never let an u16 on a quadbike

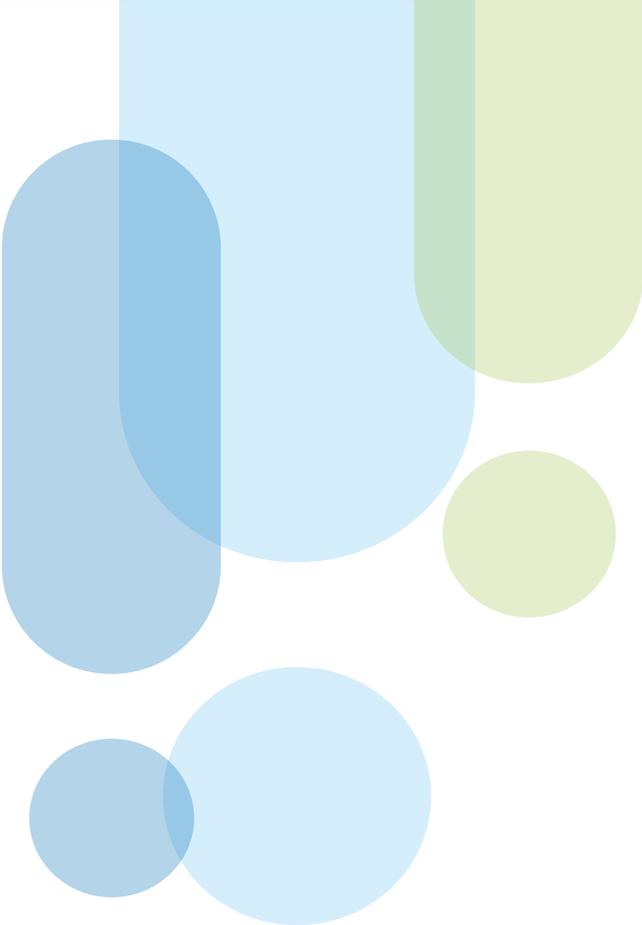
Level 2

Tell farmers the social norm has shifted. Most farmers support keeping u16 off quadbikes

Base level

Appeal to emotional need of belonging (about proper care, concern, protecting their children)

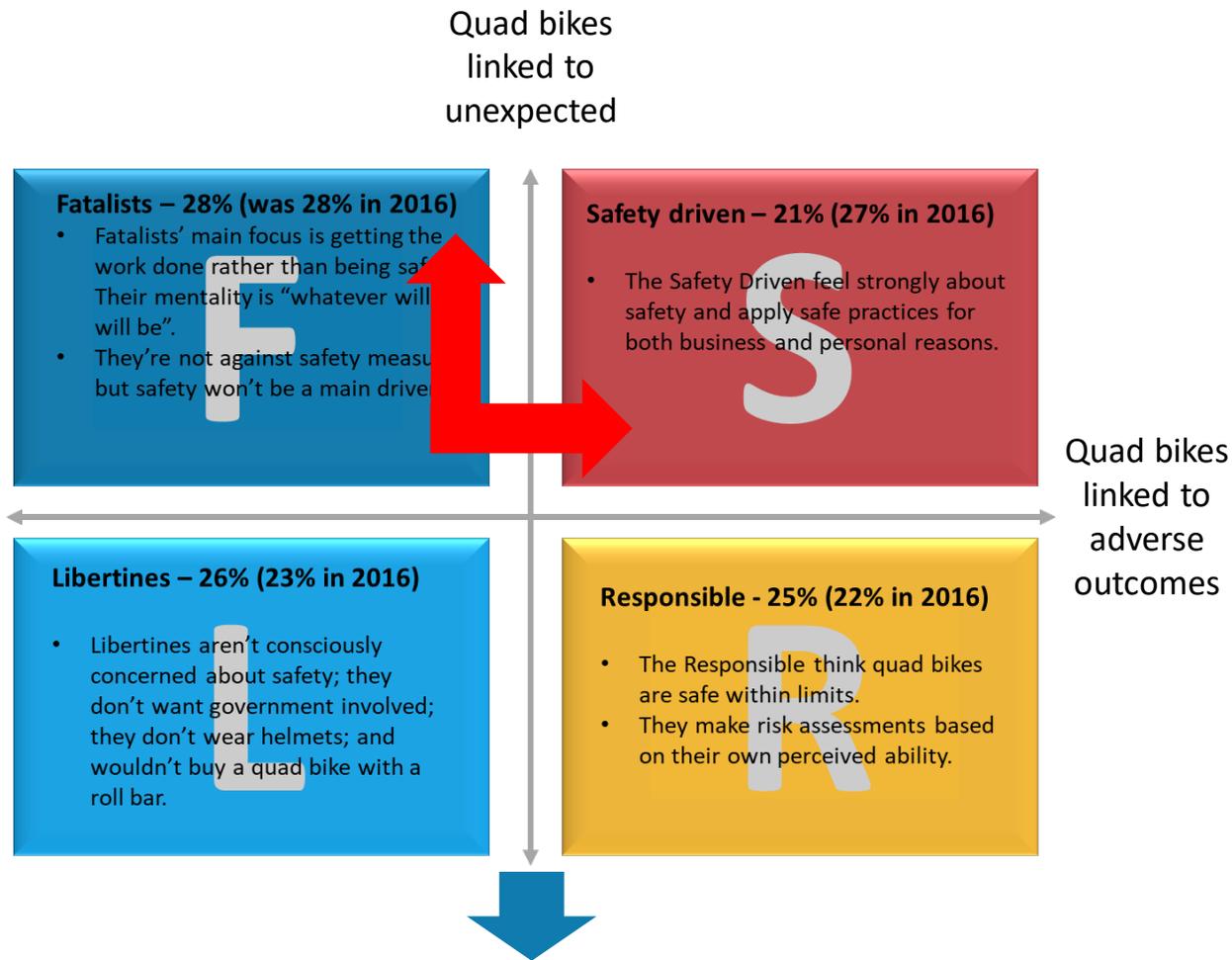




4

Conclusions and communications recommendations

Broad strategic direction



In broad terms the future Quad Bike Safety Improvement program communications need to shift NSW farmers towards a view that Quadbikes are connected to adverse outcomes (both fatalities and injuries) AND that their personal skill and experience may not be enough to avert the risk. This strategy will have the effect of shifting farmers into the safety driven space.

This strategy is especially pertinent for Libertines who underestimate the risks of quadbikes and overestimate their ability to handle adverse situations involving quadbikes.

But this strategy is right for the entire NSW farming community since quadbikes are so firmly entrenched in farming activities.

These principles should also be used to underpin messages about:

- (1) wearing seat belts when in a SSV,
- (2) avoiding children using full sized quadbikes and
- (3) the wearing of helmets
- (4) taking up training opportunities
- (5) purchase of SSVs over quadbikes
- (6) The use of drones to check fencing and stock etc.

Some are not convinced by any argument to replace QBs with an SSV. They see themselves as intelligent and safe riders and any suggestion that they’d do something stupid is offensive. They know there are risks and believe they take appropriate action to mitigate these.

Some key insights on communications



instinct and reason

One big barrier

- *"If I worried about all the risks a farmer faces I wouldn't get out of bed in the morning".*
- So there is a tendency to bury/ignore/not attend to the risks associated with quadbikes.

Who are the influencers?

- Partners and adult children were identified as the being the people who might influence them to change their habits. Doing it to keep your children/grandchildren safe when on the farm with you was another reason
- They considered messages about being a good parent and a good farmer and not letting the kids on the bikes important

Responsibility

- The other big issue was responsibility for other people on the farm Compulsory training for 16-year old's was seen as a good idea, as was training conducted by other farmers on their farm

Don't be a prat

- Good farmers look after their land, their produce, their workers, their families and themselves.
- They look for smarter ways to do things and smarter on the farm means safer. And it's a win-win when the safer option is also the cleverest and the most productive. [look to prove productivity of SSVs]

What kinds of messages connect quadbikes to adverse outcomes?



instinct and reason

The direct communications used to date that show real and adverse quadbike outcomes have been ignored by Libertines and Fatalists. They won't accept information that challenges their view that quadbikes are safe if ridden by sensible riders. All current attempts to show the connection to adverse outcomes are scrutinised and rejected as government communications that are designed to undermine farming activity. They don't believe them.

- Level 6
- Level 5
- Level 4
- Level 3
- Level 2
- Base level

13% exp QB accident requiring medical attention, 32% no medical and 50% no accident – dial this up

Identify skills required to survive (leave reader with question: Can I do that?)

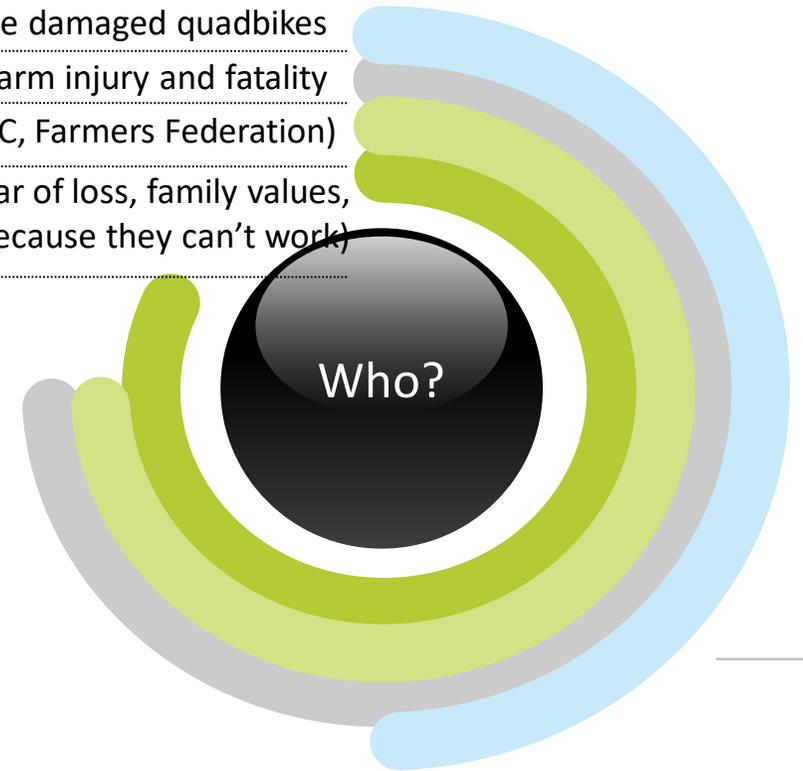
Take focus off the rider and show the damaged quadbikes

Clearly position QBs as the number 1 cause of on farm injury and fatality

Identify the agencies driving change (Coroner, ACCC, Farmers Federation)

Communication tone: expresses the emotive need of belonging (caring, safe, fear of loss, family values, loss of farm because they can't work)

Your turn will come

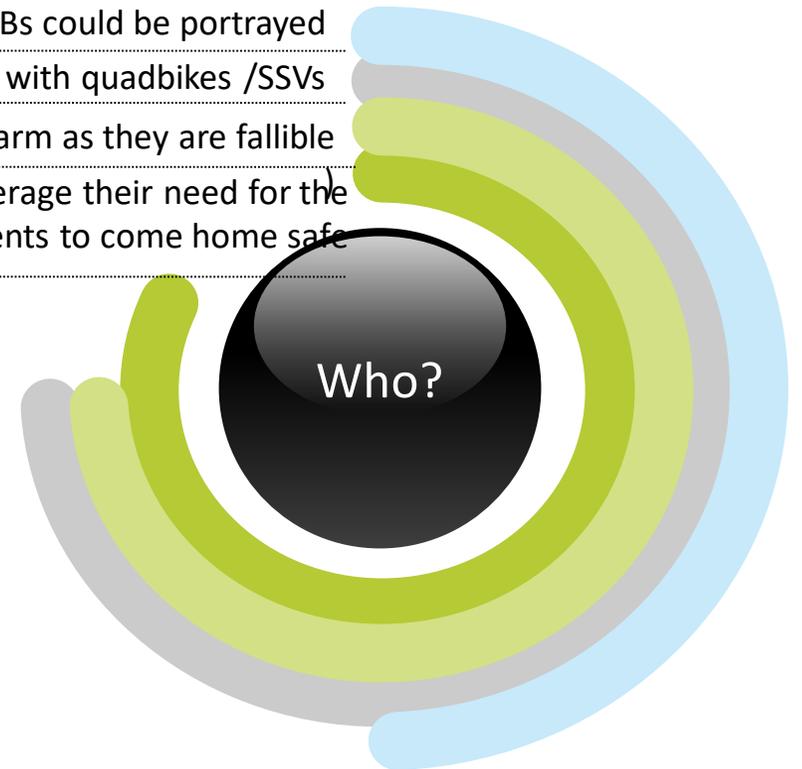


What messages make farmers question their infallibility?

NSW farmers are currently quite sensitive about their image. Normally they see themselves as independent, resilient and able to look after themselves with help needed from no-one. But the drought is changing that with footage of farmers seeing their animals starve (carcasses on the ground during drought). "Any farmer doing that is an idiot since there are good prices at the markets." They linked riding quadbikes up slopes etc as being plain stupid too.

- Level 6** They will attend to messages about being a good parent/good farmer & not letting kids on QBs is sensible
- Level 5** Identify skills required to survive (leave reader with question: Can I do that?)
- Level 4** Farmers were being portrayed (by the media) as pretty dumb. Dumb behaviour on QBs could be portrayed
- Level 3** Or promote what smart farmers are doing with quadbikes /SSVs
- Level 2** Be more safety conscious to keep your children/grandchildren safe when on the farm as they are fallible
- Base level** Partners and adult children are key influencers for changing their behaviour. Leverage their need for the parents to come home safe

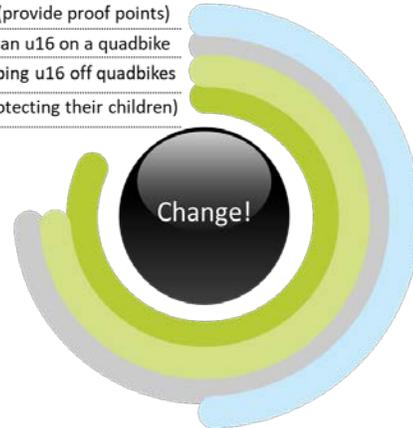
"Overall: Don't be a prat. Good farmers look after their land, their produce, their workers, their families and themselves. They look for smarter ways to do things and smarter on the farm means safer. And it's a win-win when the safer option is also the cleverest and the most productive"



Specific communications recommendations

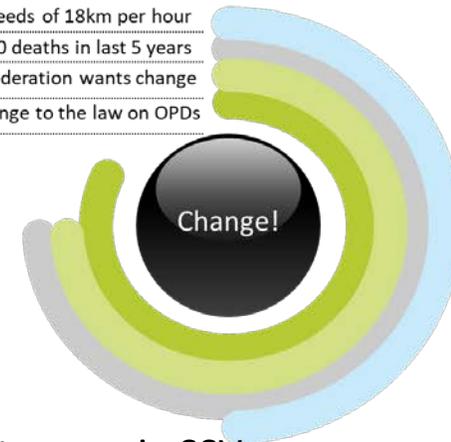
What messages will keep children off full sized quad bikes?

- Level 6 Even the manufacturers agree quadbikes can't be ridden by children
- Level 5 Offer solutions – i.e. use of smaller quadbikes
- Level 4 Show how children struggle to control quadbikes (provide proof points)
- Level 3 Caring parents would never let an u16 on a quadbike
- Level 2 Tell farmers the social norm has shifted. Most farmers support keeping u16 off quadbikes
- Base level Appeal to emotional need of belonging (about proper care, concern, protecting their children)



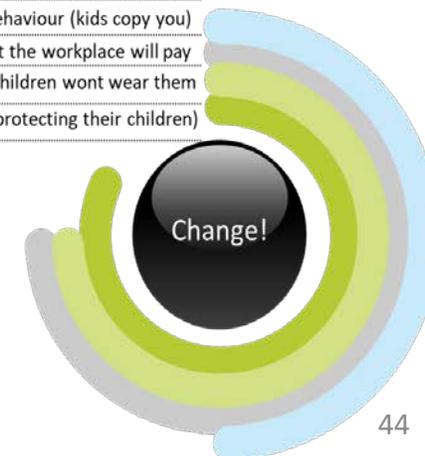
What kinds of messages resonated around OPDs

- Level 6 The mandated OPD is the single bar; it will come with the new QB (no need to install)
- Level 5 It's the average everyday farmer who is injured
- Level 4 Most accidents are farmers who die in late afternoon at speeds of 18km per hour
- Level 3 Define the size of the issue: 140 deaths in last 5 years
- Level 2 QB injuries/fatalities are main cause of on-farm accidents. Farmers Federation wants change
- Base level Coroner is so concerned they have agitated for change to the law on OPDs



What kinds of messages will get seatbelts worn in SSVs

- Level 6 Make it a habit
- Level 5 The excuse of getting in & out doesn't wash – examples of couriers, taxi drivers etc – they swear seat belts
- Level 4 Communications that reflect the powerful impact of role modeled behaviour (kids copy you)
- Level 3 If a worker gets injured not wearing a seat belt the workplace will pay
- Level 2 Wearing seat belts is a habit – you need to be a good role model or your children wont wear them
- Base level Appeal to emotional need of belonging (about proper care, concern, protecting their children)



Key take outs – communications that will engage NSW farmers

“ Imagine there was a Government program which supported you modifying a quad bike with an overhead protection device (OPD). This scenario describes what the Program offers you. Based on this, please tell us what you would likely do...? **Would you be encouraged to Modify an existing quad bike or to do nothing different.** Read the program information carefully and make a realistic and honest choice....

Current offer

This is the level of intention with a minimal offering in terms of features and experiences

1. Cost between \$600 to \$1400 to install an operator protection device (roll bar/crush protection) with a subsidy of \$600
2. Must be modified with Rigid Roll Bar to qualify
3. Book in at a commercial outfitter & drop off/pick up a week later
4. \$1400 for the cost of having protection device fitted
5. Fitted in 51-100km away from home
6. No training provided
7. Pay full price of OPD and fitting and then claim back subsidy
8. Free lightweight and ventilated helmet included worth \$120
9. No statistics on risk given to you

No, I wouldn't
70%

Yes, I would modify my existing quad bike
30%

Intention at enhanced scenario 49%

(with a positive improvement for the top 3 drivers to the highest level)



Intention at optimised scenario 56%

Setting best level for all attributes

Potential intention rises to 56% if modification of existing quad bike delivers all the initiatives tested at the optimal level

Key communication and service elements that will encourage uptake

for **modifying an existing quad bike with an OPD**



Arranging the modification, training and payment
Pay the full price and then claim back the subsidy
(base case)

27%



Training provided for free in program
Written & Visual training Guide
(+6.4% to intention)

23%



Knowing the following statistic on risk
Most deaths caused by asphyxiation from a quad bike rollover are slow and painful / by head and brain injury, fractures and traumatic asphyxiation
(+5.6% to intention)

20%



Cost of having protection device fitted
Free
(+6.5% to intention)

13%



Helmet protection provided
Free lightweight and ventilated helmet included worth \$120
(base case)

9%



Convenience of location and having protection device fitted
Have protection device fitted less than 30km away from home
(+3.7% to intention)

7%



How roll bar is fitted and training provided
Book in with a program paid installer drop in and pick up same day and do training same day and do training same day
(+0.2% to intention)

0%



Payment
Pay the price minus the subsidy at the time of fitting
(+0.05% to intention)

0%



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