



RAC Report on Motoring 2009

Motorist survey – research presentation

11th May 2009



quadrangle
research for decision makers™

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Prepared for: RAC RoM Steering Group meeting

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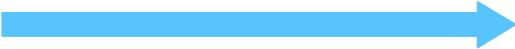
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- Motorist survey 2009
 - methodology
 - sample
- Key findings 
 - from 2009 survey
 - supplemented with data from 2007 & 2008

1. About the motorist
2. Setting the scene
3. Gauging the mood in 2009 – tracker questions
4. Safety on the road
5. Drink driving
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9. The environment & my car
10. Taxation and cost to the motorist
11. Congestion on the roads
12. Motoring and the credit crunch

Quadrangle has been commissioned to deliver the RAC Report on Motoring 2009 having conducted the research in both 2007 and 2008.

This year the RAC Report on Motoring covers a variety of topics, increasing the diversity of findings.

The RAC RoM should achieve the following three objectives:

1. continue to raise the profile of RAC with key stakeholders
2. deliver high level media coverage in broadcast and print with both a national and regional focus
3. support brand objectives

This document presents research findings to help create the RAC Report on Motoring 2009.





1. motorist survey 2009

Methodology

Sample details

A total sample of 1,109 motorists:

- 1,004 nationally representative for age, gender, socio-economic groups, all GB regions and new car buyers
- plus 65 booster sample of company car drivers – to provide sufficient numbers for analysis (total of 105)
- results post-weighted to represent company car drivers as per market size (4%)

Survey undertaken by FieldWorks:

- internet survey (hosted by Research Now)
- panel of GB motorists
- interview length – 20 minutes

Fieldwork dates

- Monday 6th April – Tuesday 14th April 2009

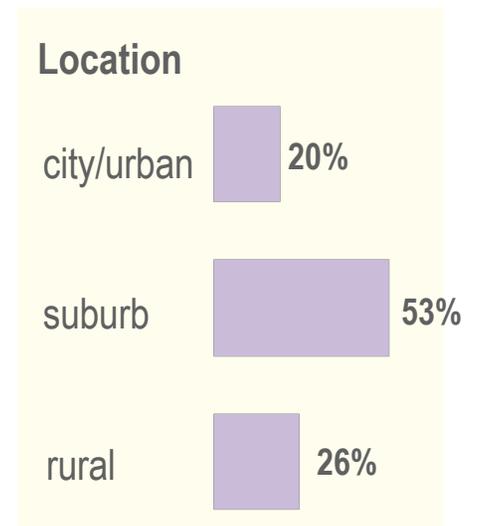
Throughout the report significant differences have been noted.

- Significantly higher 
- Significantly lower 

Note: Numbers may be rounded and may not add exactly to 100%

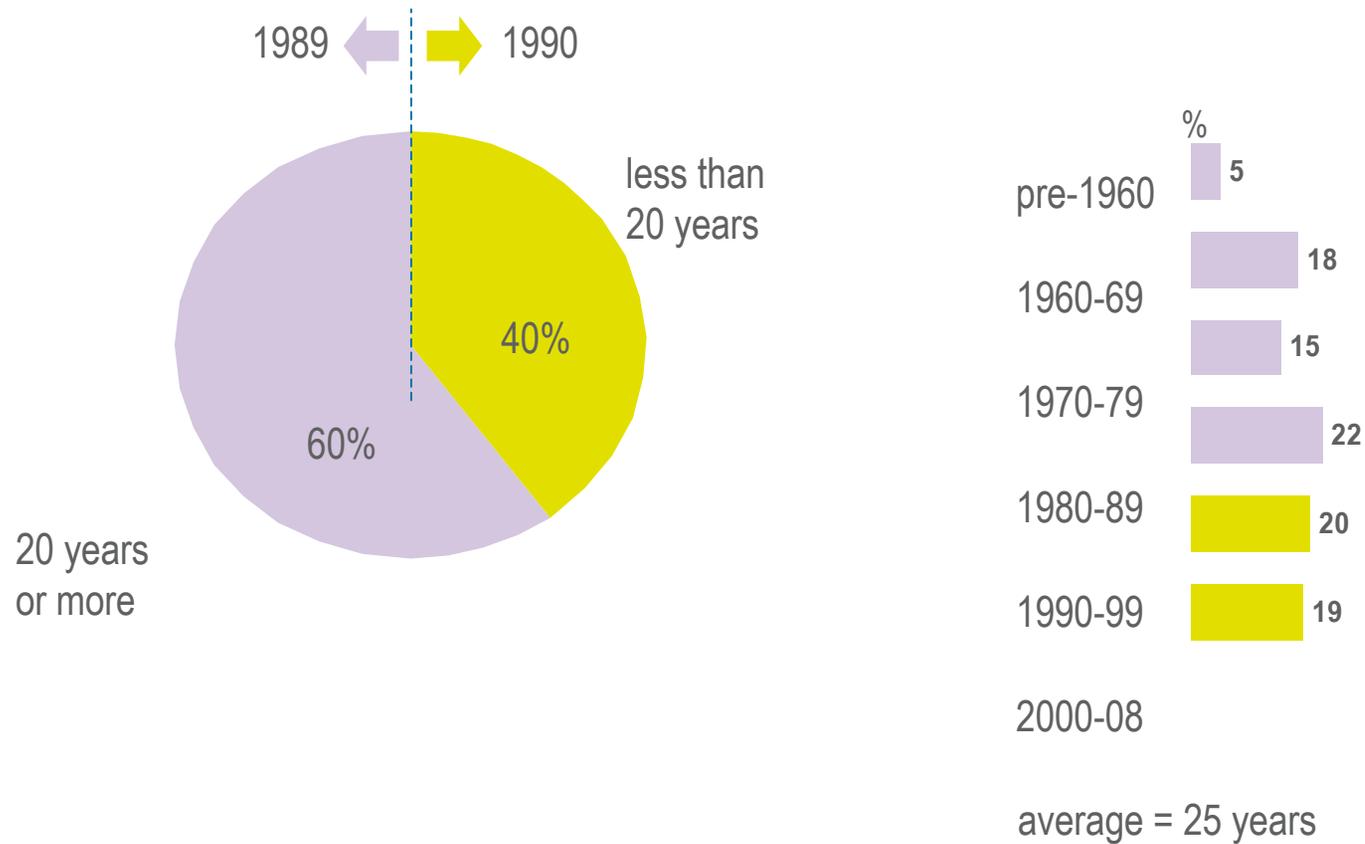
		quota set (n=1,000) %	achieved (n=1,109) %	weighted (n=1,109) %
sex:	male	49	53	53
	female	51	47	47
age:	17-24	13	11	11
	25-44	36	38	38
	45-64	31	32	32
	65+	20	19	19
socio-economic grouping:	ABC1	55	59	58
	C2DE	45	41	42

	quota set (n=1,000) %	achieved (n=1,109) %	weighted (n=1,109) %
London	13	11	11
South East	14	16	16
South West	9	9	9
West Midlands	9	9	9
East Midlands	7	8	8
East of England	9	7	7
Yorks/Humber	9	9	9
North East	4	4	4
North West	12	13	13
Wales	5	5	5
Scotland	9	9	9

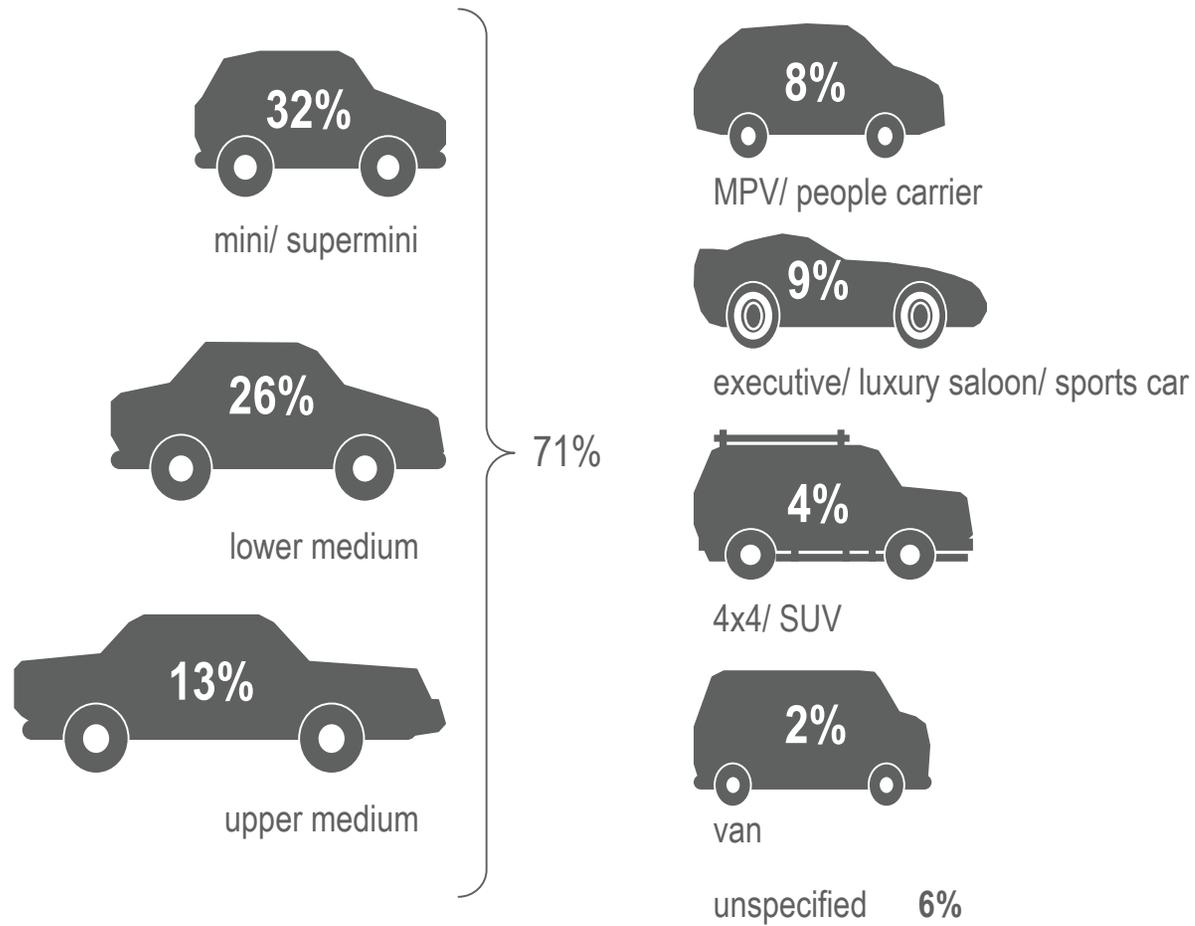


	quota set (n=1,000) %	achieved (n=1,109) %	weighted for national / market representation (n=1,109) %
Hold current driving licence	100	100	n/a
Drive car at least monthly nowadays	100	100	n/a
Car ownership			
• privately owned	88	90	94
• provided by company	10	9	4
• business expenses	2	1	2
			} 6%
Car purchase			
• new	33	37	35
• nearly new	} 67	19	20
• second-hand/ used		44	45

length of time driving



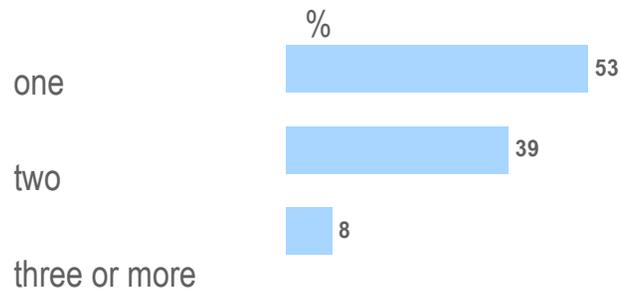
SQ9 And roughly in what year did you pass your driving test?
Base: all respondents (n=1,109)



Q5&6 What is the make and model of the car in your household that you mainly drive?
Base: all respondents (n=1,109)

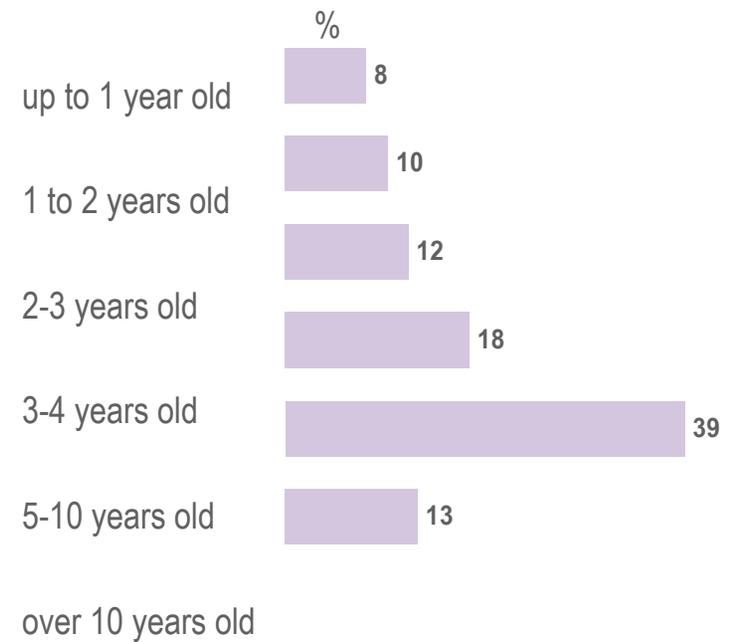
Q4 How many cars are there in your household?

Base: all respondents (n=1,109)

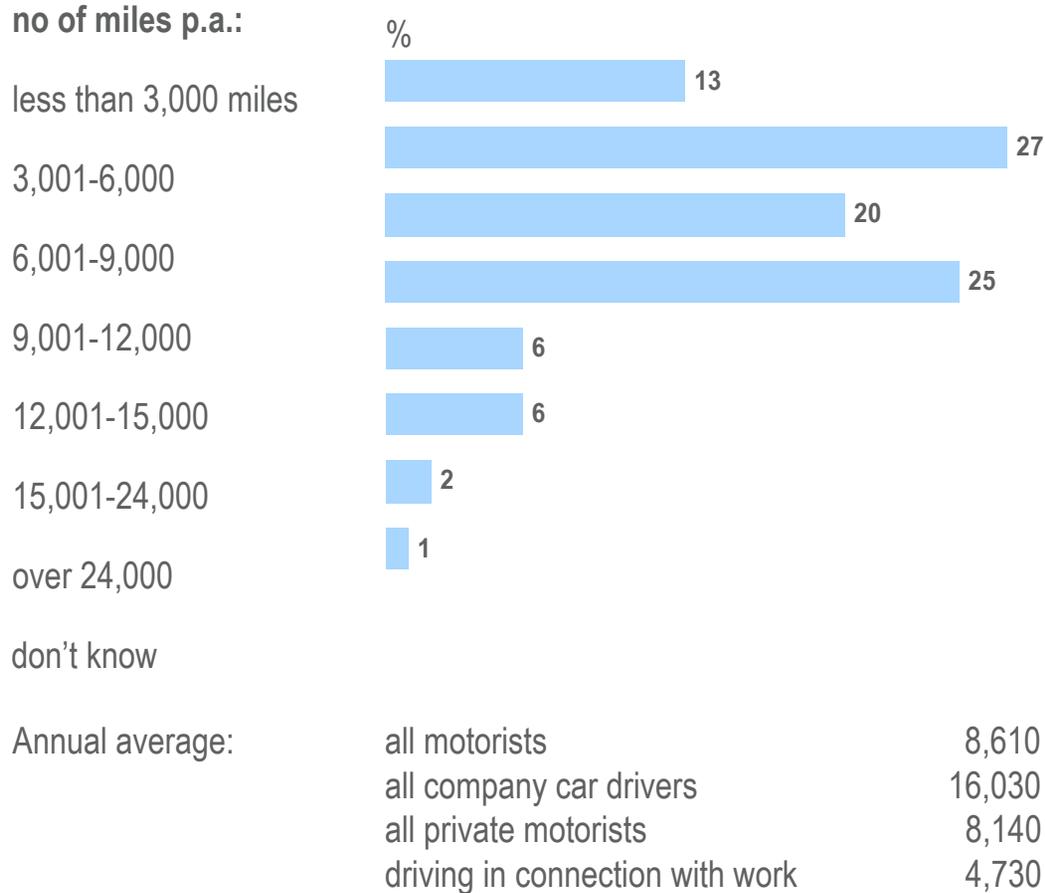


Q7 Approximately how old is this car?

Base: all respondents (n=1,109)



Average age 5.6 years old



Qa Approximately how many miles do you drive in a year, on average? Base: all respondents (n=1,109)

Qb How many of these miles, if any do you drive in connection with your, or someone else's work? Base: those who drive for work (n=465)



2. setting the scene

other modes of transport

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Walking and being a passenger in a car are the most common modes of transport in the UK outside of driving a car. Over two-thirds use the bus, train/tube or taxis but these modes are used less frequently. Compared to 2007 and 2008 there has been a significant increase in riding a bicycle and taking the bus. The increases from 2008 are mainly from motorists starting to do them 'less than once a month'.

			ever %	every day/ most days %	1-3 times a week %	less than once a week %	less than once a month %	never %
Walk/ pedestrian			93 7	39	35	13	6	
Passenger in car	2007	2008	92 8	4	32	30	26	
	50	62						
Public bus/ coach/ tram	n/a	56	69 31	4	10	19	37	
	n/a	57						
Train/ tube	25	29	67 33	4	4	13	46	
Taxis			66 34	<1	3	14	49	
Ride bicycle			35 65	2	7	8	19	
Qc	Apart from driving a car, how often do you use other modes of transport? Base: all respondents (n=1,109)				2	5	28	
Car sharing			27 73	1	5	8	13	

other modes of transport

research for decision makers™

Walking and being a passenger in a car are the most common modes of transport in the UK outside of driving a car.

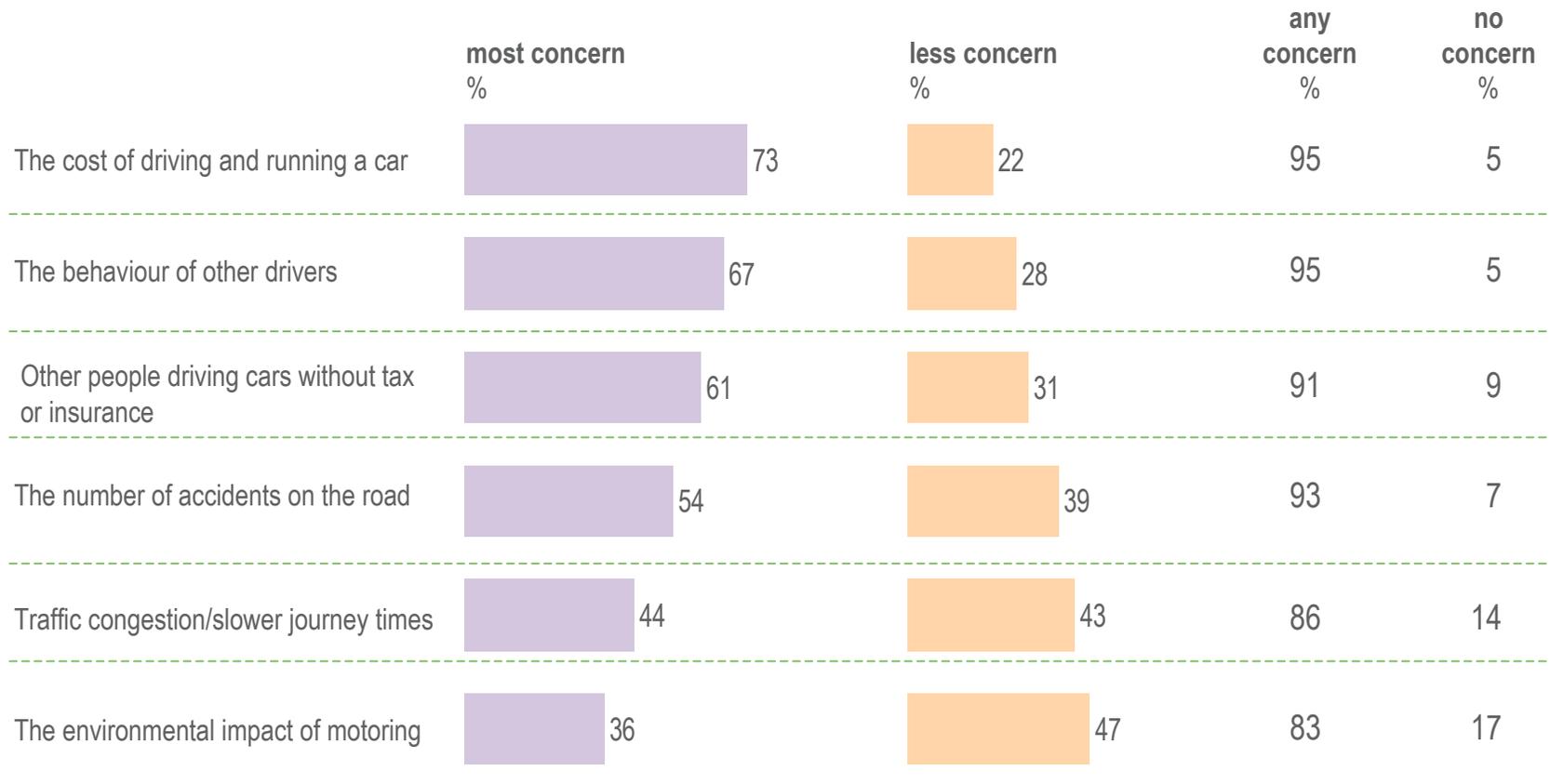
			ever %	never %	
Walk/ pedestrian			93	7	↑ 17-44 yr olds & ABC1 ↓ West Midlands ↑ City/town
Passenger in car	2007	2008	92	8	↑ 17-24 yr olds & females
Public bus/ coach/ tram	50	62	69	31	↑ ABC1 ↓ Village/rural
Train/ tube	n/a	56	67	33	↑ 17-24 yr olds, males & ABC1 & London ↑ City/town
Taxis	n/a	57	66	34	↑ 17-24 yr olds, males, ABC1 ↓ East of England ↓ Village/rural
Ride bicycle	25	29	35	65	↑ 17-44 yr olds, males, ABC1
Park & ride			35	65	↑ 25-64 yr olds
Car sharing			27	73	↑ 17-24 yr olds
Motorcycle/ scooter			8	92	↑ 17-44 yr olds & males ↑ City/town

Qc Apart from driving a car, how often do you use other modes of transport?
Base: all respondents (n=1,109)

issues that might be of concern to motorists

research for decision makers™

The cost of driving achieves the highest level of concern in 2009 amongst UK motorists. Traffic congestion and the environmental impact of motoring are of lesser concern but still garner high levels.

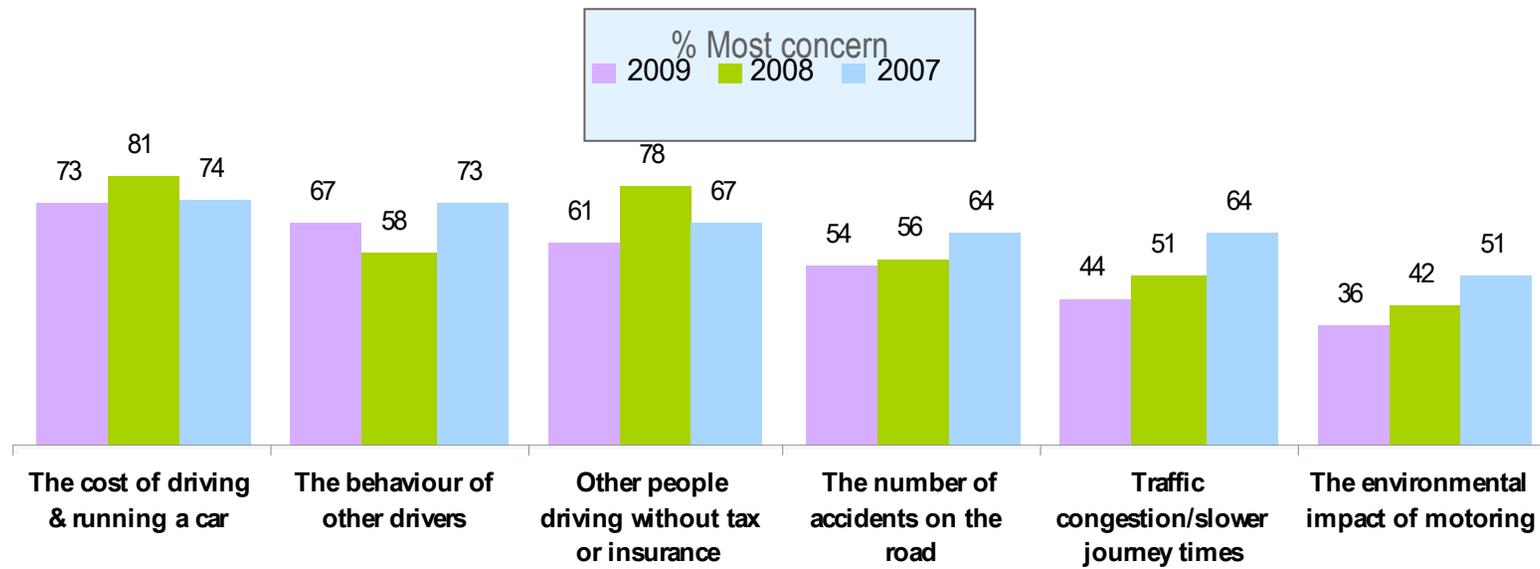


Q1 Here is a list of issues that might or might not be of concern to motorists today. Which are of more concern to you, less concern to you, and which are of no concern to you at all?
Base: all respondents (n=1,109)

issues that might be of concern to motorists

research for decision makers™

There are variations in the level of most concern from 2007 to 2009. Overall, there were higher levels of concern in 2008 than in 2007 or 2009. While levels of concern do vary they are consistently high.



C2DE= 76% ↑
 Female= 76% ↑
 <44yrs= 77% ↑

C2DE= 70% ↑
 Female= 72% ↑
 45-64 yrs= 70% ↑

Male= 63% ↑
 25yrs+ = 71% ↑

C2DE= 76% ↑
 Female =63% ↑

Male= 47% ↑
 17-24 = 50% ↑

Female = 39% ↑
 25-64yrs = 39% ↑

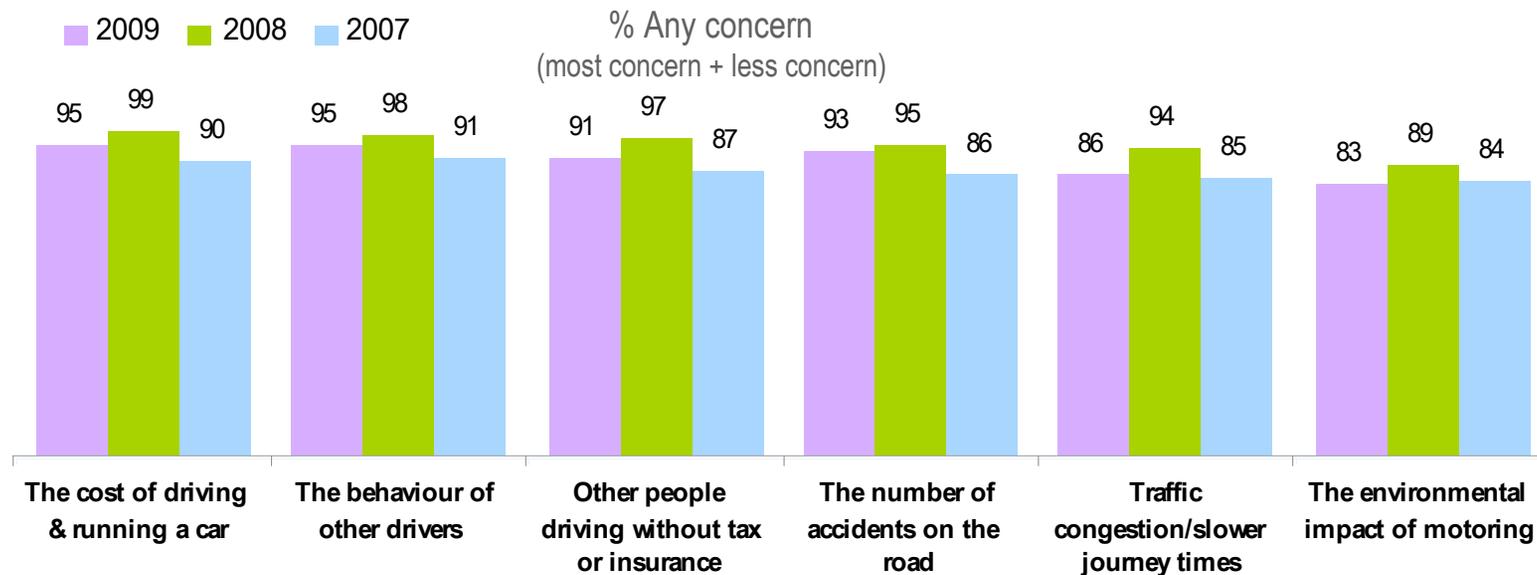
Q1 Here is a list of issues that might or might not be of concern to motorists today. Which of these are of most concern to you, less concern to you, and which are of no concern to you at all?

Base: all respondents (n=1,109), (Report 3 2008 n=1,040), (2007 n = 2,029)

issues that might be of concern to motorists

research for decision makers™

There is variation in levels of any concern from 2007 to 2009. Overall, there were higher levels of concern in 2008 than in 2007 or 2009. While levels of concern do vary they are consistently high.



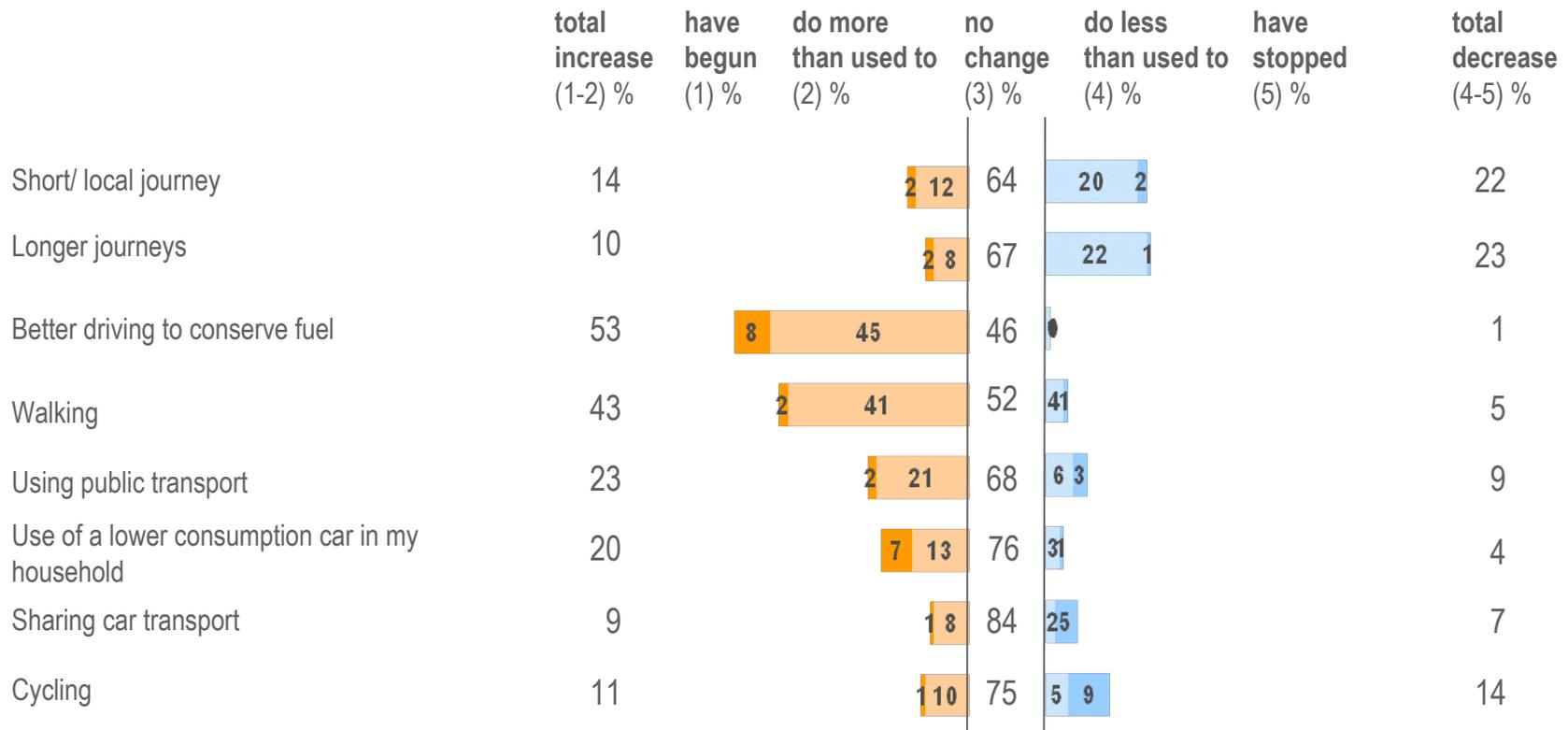
Q1 Here is a list of issues that might or might not be of concern to motorists today. Which of these are of most concern to you, less concern to you, and which are of no concern to you at all?

Base: all respondents (n=1,109), (Report 3 2008 n=1,040), (2007 n = 2,029)

changing driving behaviour

research for decision makers™

On the whole, motorists have largely not changed their behaviour over the past 12 months. The largest changes are a greater proportion of motorists driving better to conserve fuel and walking. Consumers have also decreased the number of journeys they take in the past 12 months with one in five reducing short and long journeys. In 2008 a greater proportion decreased the number of local journeys they took but this has leveled off in 2009.



Q2 Thinking about the past 12 months, in what ways has your driving behaviour changed?
Base: all respondents (n=1,109)

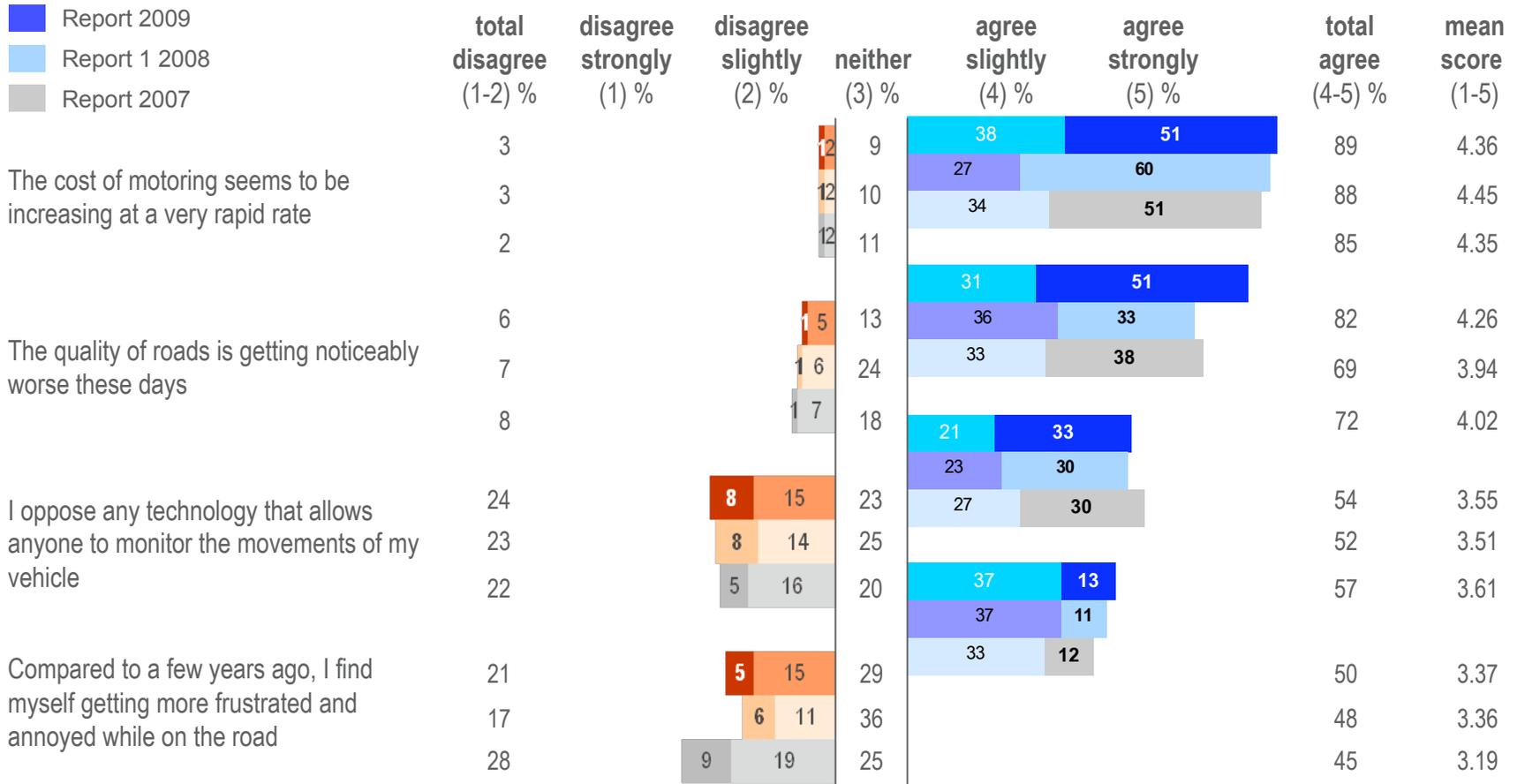


3. gauging the mood in 2009 – tracker questions

views on motoring – general

research for decision makers™

Agreement that the cost of motoring is increasing remains high. There is a increase in the proportion feeling the quality of roads is getting worse.



Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

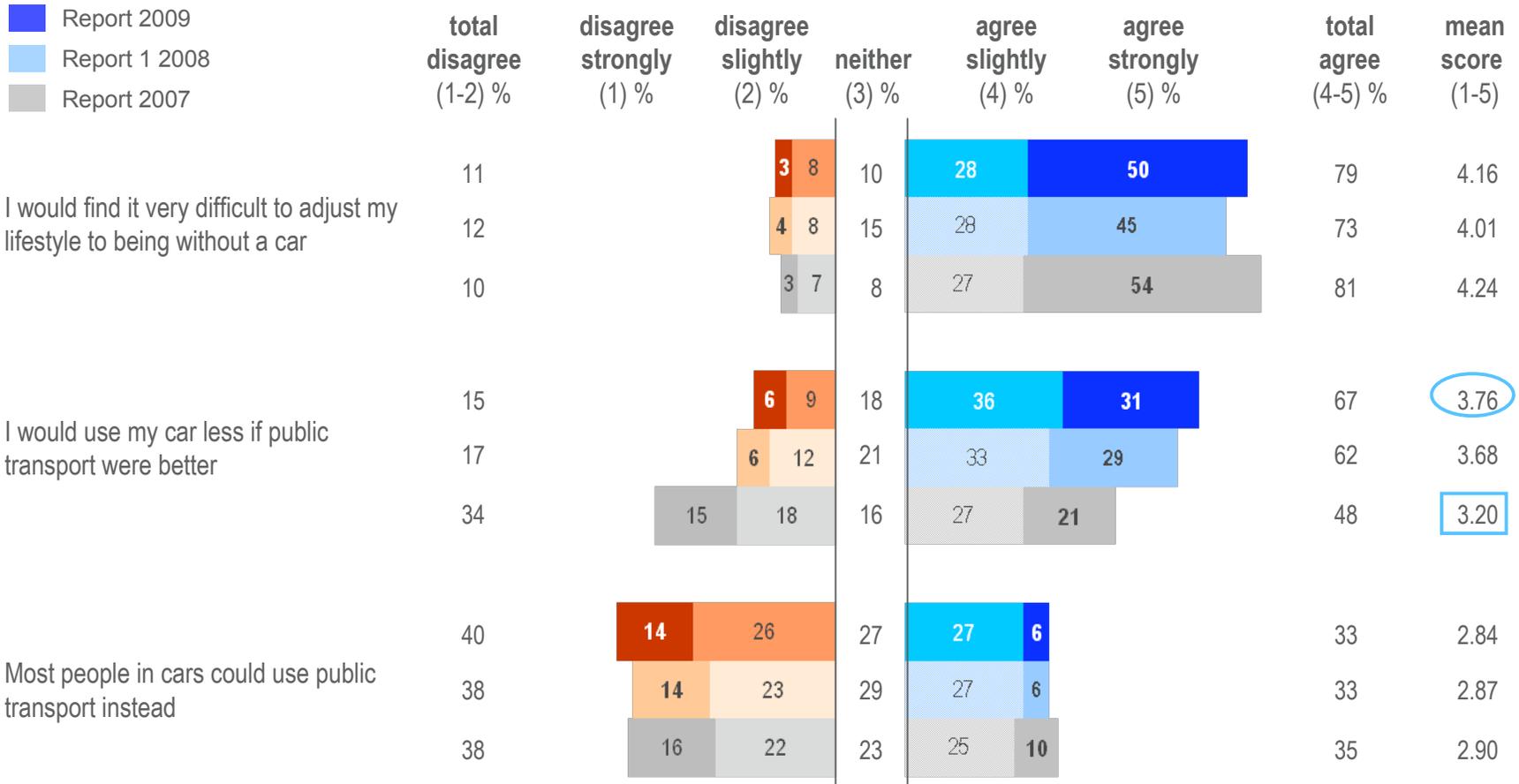
Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

views on motoring – me & my car

research for decision makers™

One-half (50%) strongly agree they would find it difficult to adjust without a car in 2009. Since 2007 there is growing agreement that motorists would use their car if public transport were better.



Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

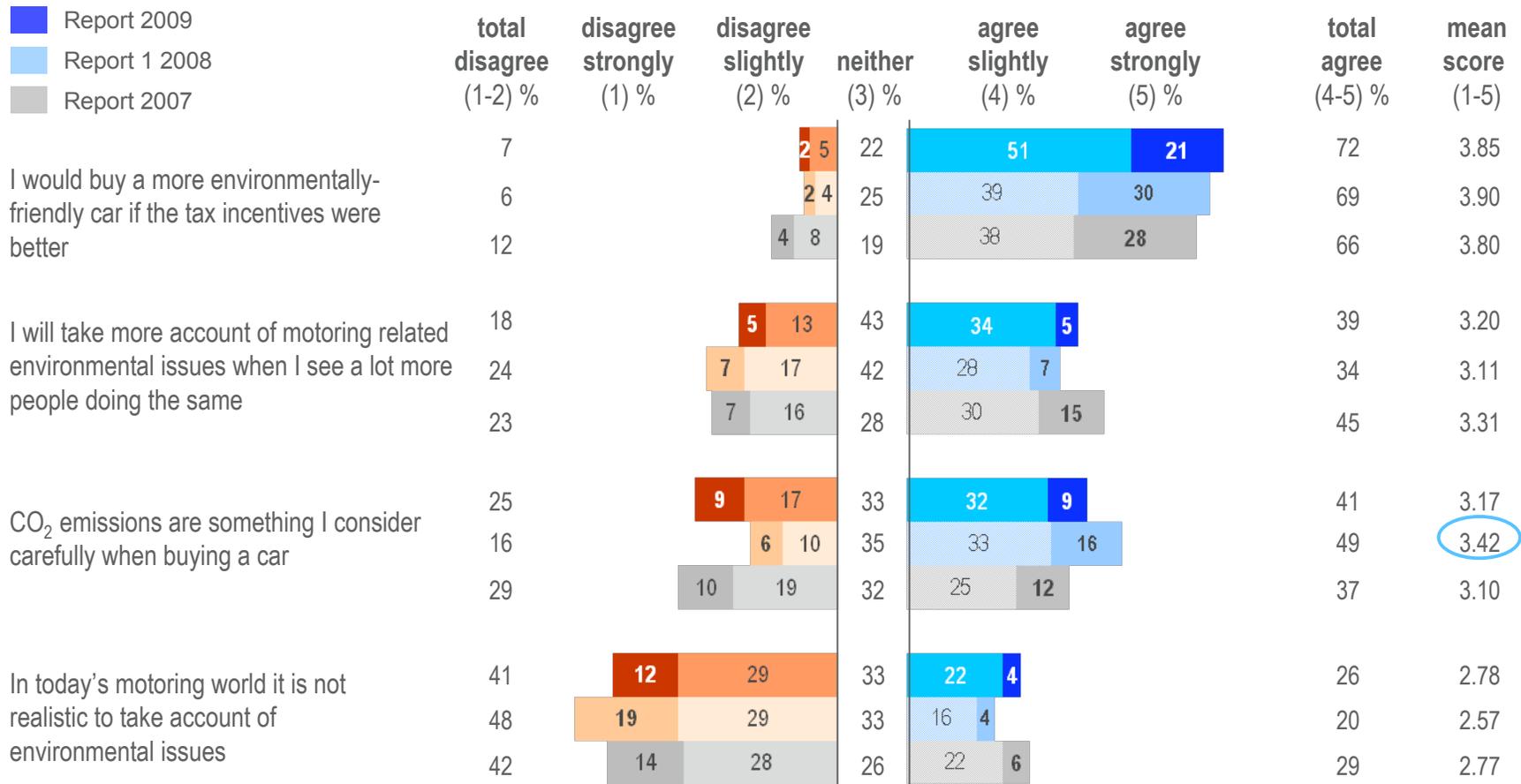
Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

views on motoring – environmental

research for decision makers™

Compared to 2008 more motorists agree that they would buy a more environmentally friendly car if tax incentives were better although the majority slightly agree in 2009 compared to 2008.



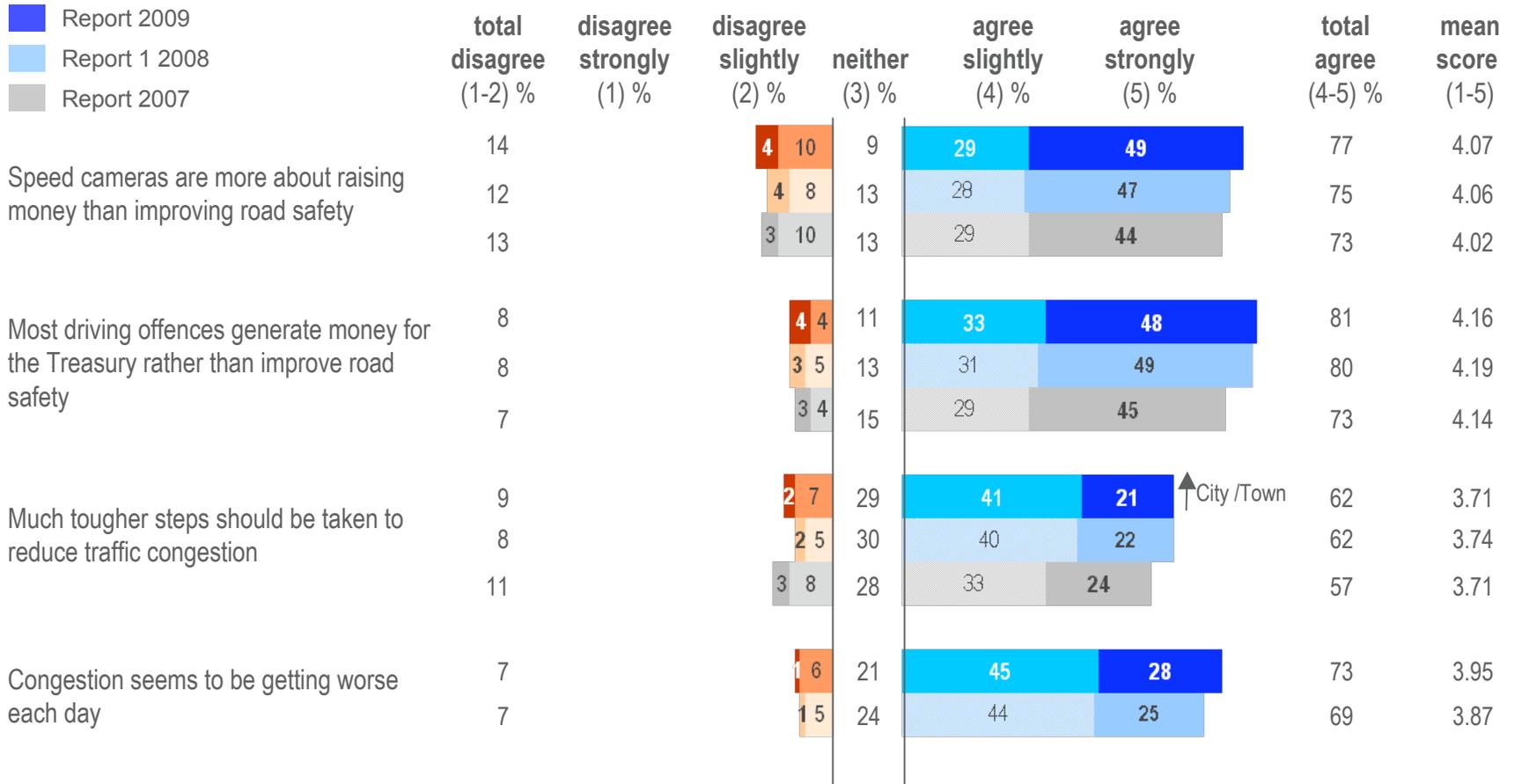
Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

views on motoring – revenue generation/congestion research for decision makers™

The majority (77%) agree that speed cameras are more about raising money than improving road safety. Slightly more motorists in 2009 agree that congestion seems to be getting worse each day.



Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

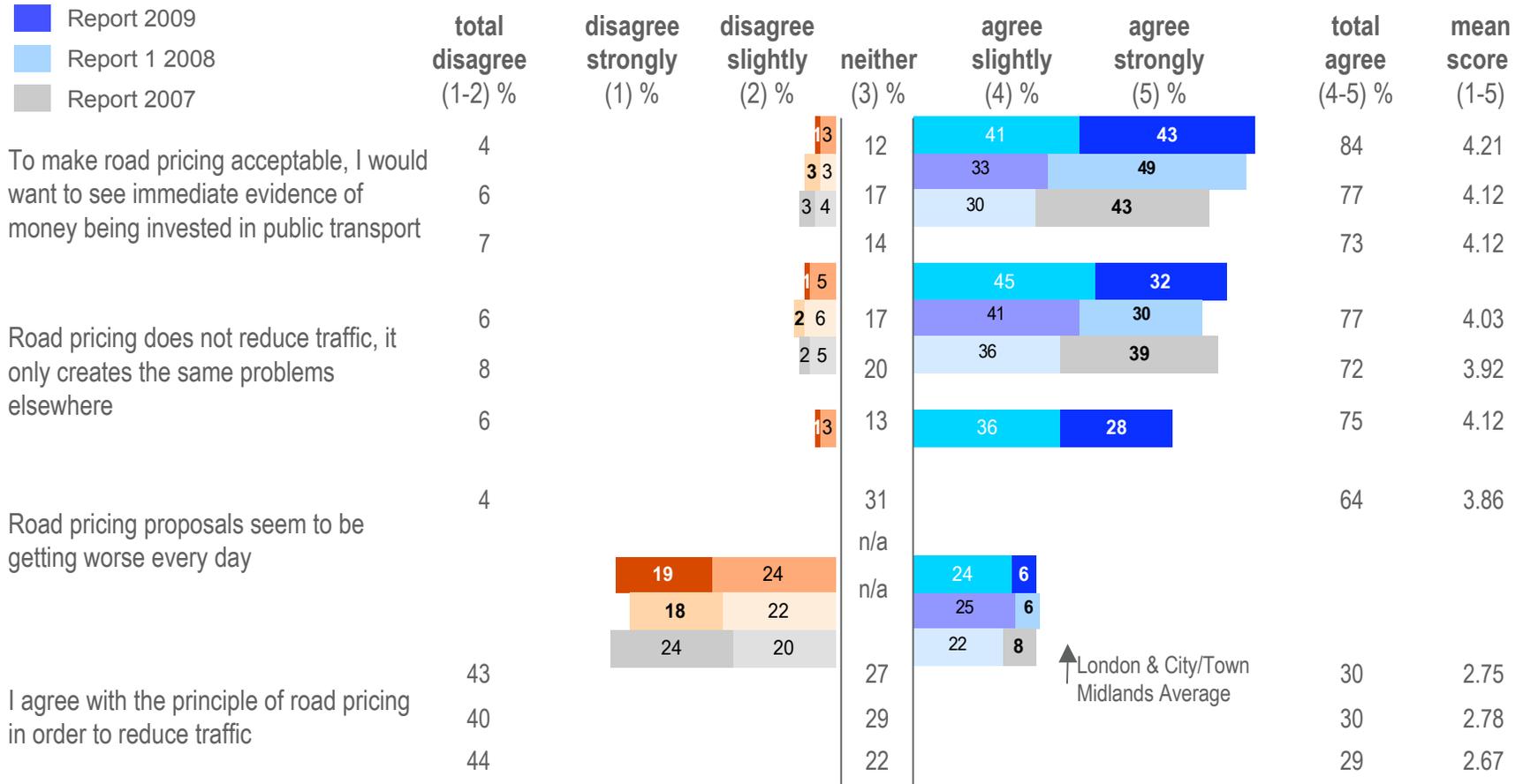
Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

views on motoring – road pricing

research for decision makers™

In 2009, 43% disagree with road pricing in order to reduce traffic. 84% say they need evidence of money being invested in public transport to make road pricing acceptable.



Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

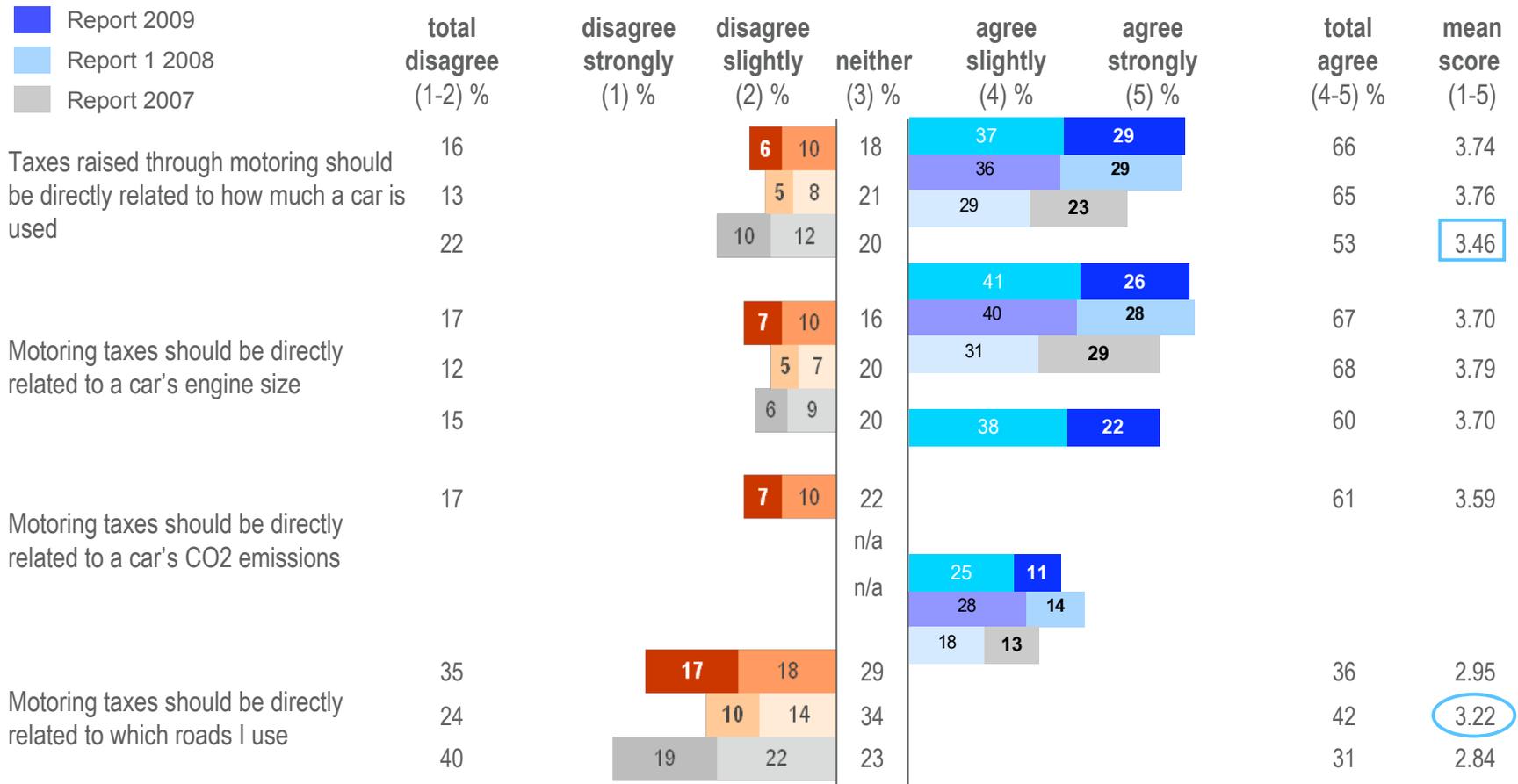
Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

views on motoring – motoring taxation

research for decision makers™

In 2009, approximately two-thirds agree that taxes should be related to how much a car is used and the car's engine size.



Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

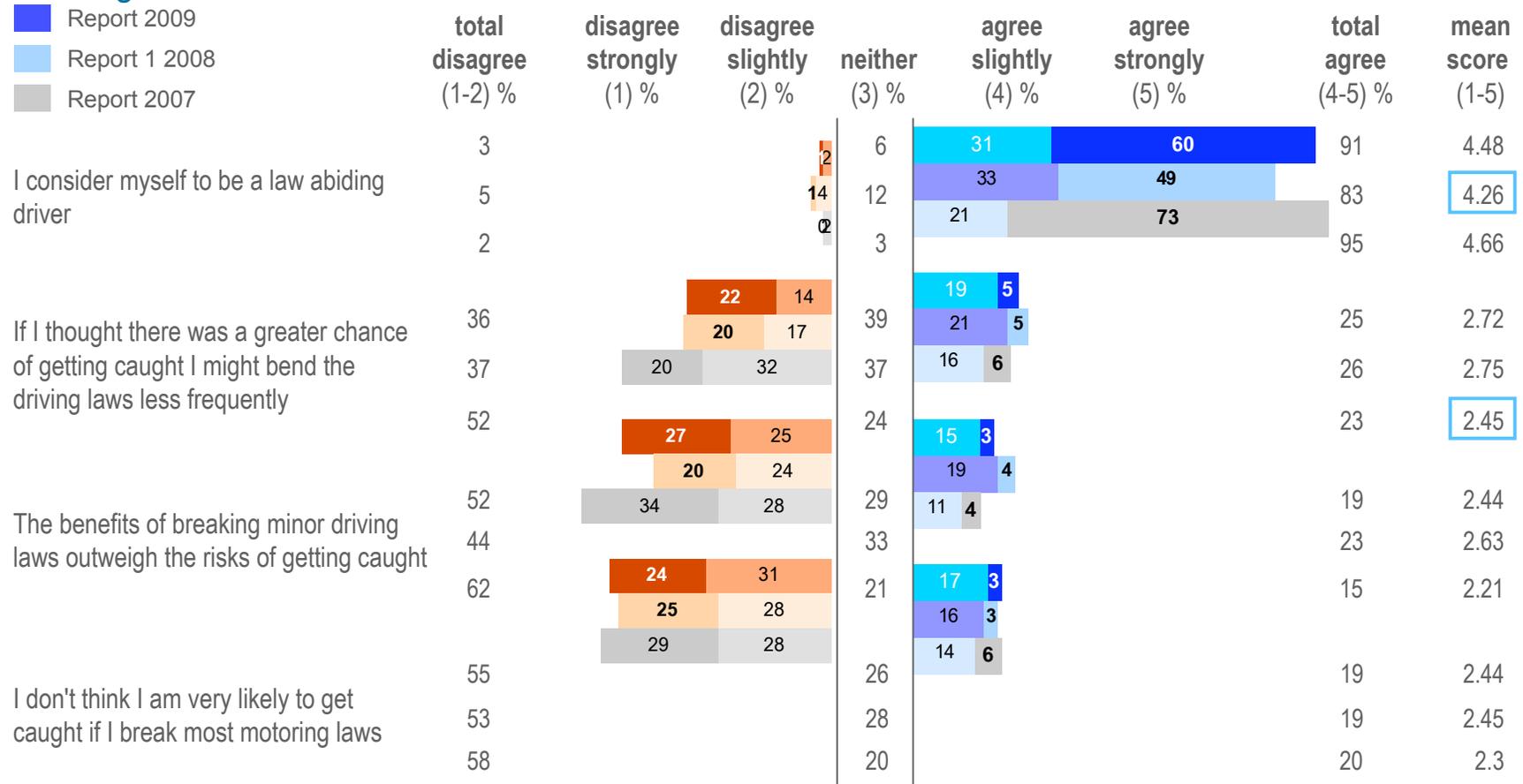
Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

views on motoring – the law

research for decision makers™

The majority (91%) consider themselves to be law abiding drivers. Over one-half disagree that the benefits of breaking the law outweighs the risk and disagree that they are unlikely to get caught breaking the law.



Q3a, 3b, 19, 46 How strongly do you agree or disagree with the following statements?

Base: all respondents 2009 (n=1,109); 2008 (n=1,116); 2007 (n=2,029)

2007 figures do not add up to 100% because 'don't know' was given as an option

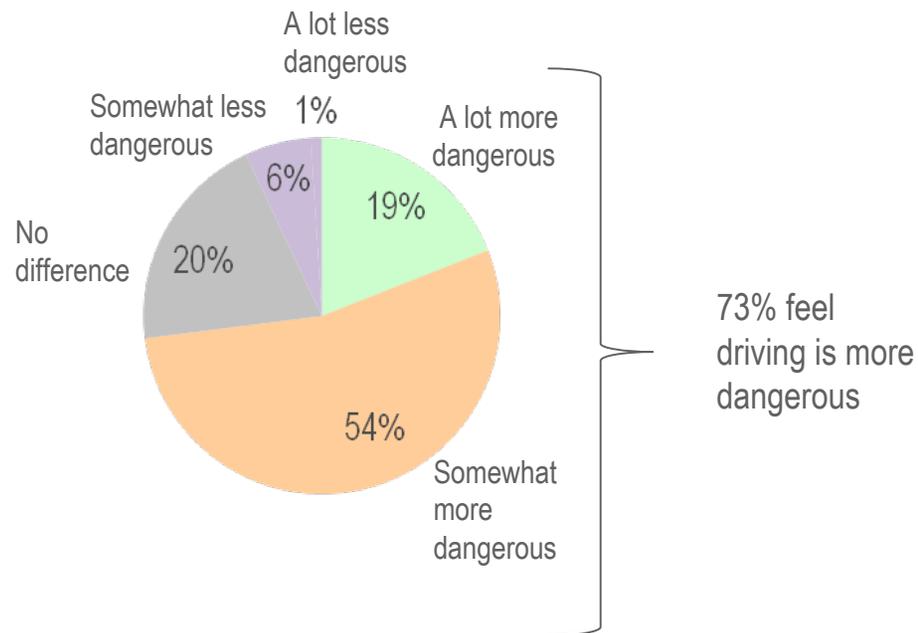


4. safety on the road

dangerous roads

research for decision makers™

A majority of motorists (73%) feel driving in the UK today is more dangerous than 10 years ago. Older motorists and females are more likely to think driving has become more dangerous in the past 10 years.



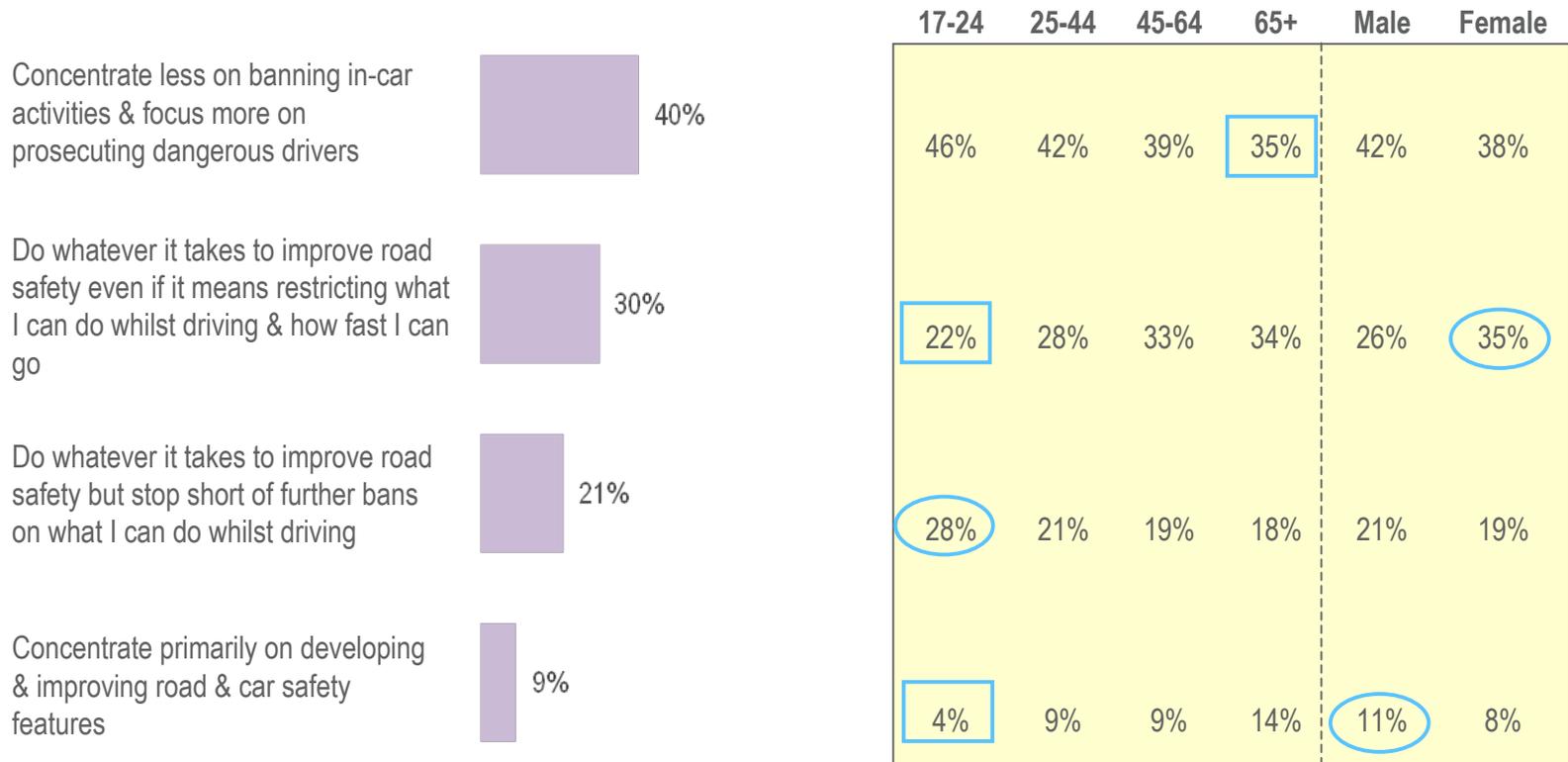
	A lot/ somewhat more dangerous
17-24	65%
25-44	70%
45-64	76%
65+	79%
Male	68%
Female	79%

Q28 Do you think driving has become more or less dangerous in the UK in the past 10 years?
Base: all respondents (n=1,109)

making dangerous roads safe

research for decision makers™

The most popular view (40%) of how the government could increase road safety is to focus more on prosecuting dangerous drivers and less on banning in-car activities. 17-24 year olds are less likely to agree that the government should do whatever it takes to improve road safety including increasing restrictions. Females are more in favour (35%) of restrictions than their male (26%) counterparts.

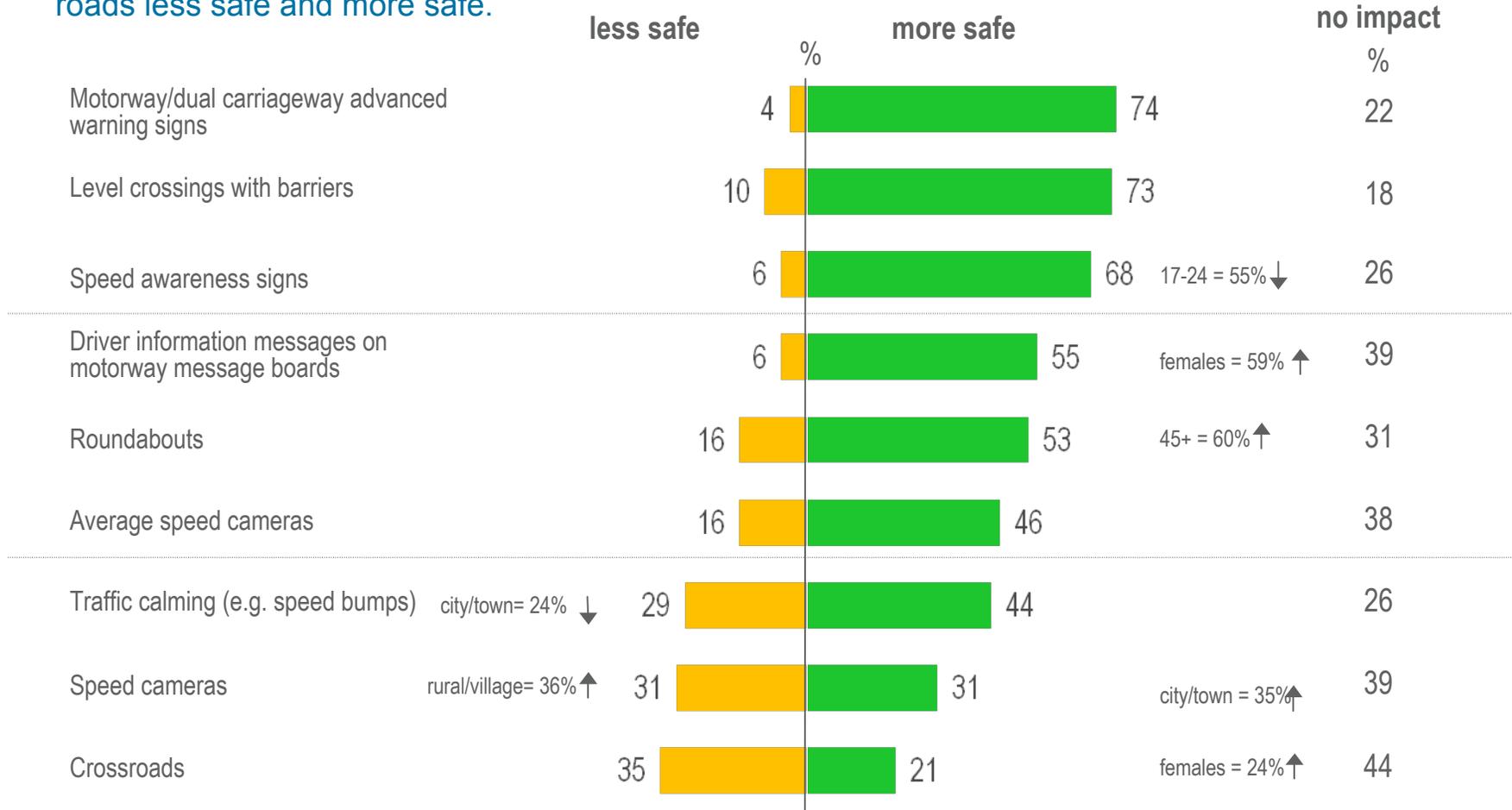


Q31 Which one of the following statements best describes your view of what the Government should do to increase road safety?
 Base: all respondents (n=1,109)

traffic features and their impact on safety

research for decision makers™

Motorway/dual carriageway advanced warning signs along with level crossing barriers are perceived to have made motoring safer. Speed cameras are polarizing with equal numbers saying they have made roads less safe and more safe.

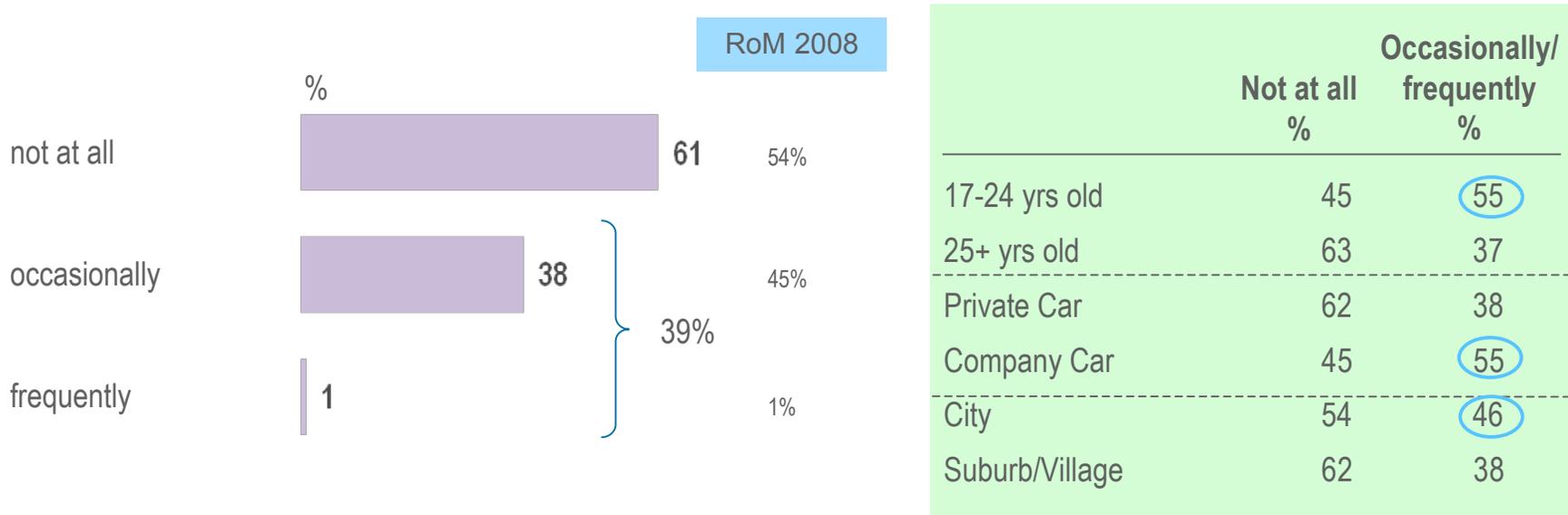


Q27 Do you think the introduction of the following features have made motoring in general: more safe, less safe or had no impact?
Base: all respondents (n=1,109)

distractions whilst driving

research for decision makers™

The majority of consumers claim not to be seriously distracted by in-car instruments or gadgets (61%). Younger motorists, company car owners and those living in cities are more likely to become seriously distracted whilst driving.



Q23 How often do you become seriously distracted whilst driving by using in-car instruments, equipment or other gadgets?
Base: all respondents (n=1,109)

instruments/equipment that seriously distract whilst driving

research for decision makers™

Among those who are distracted by in-car instruments or gadgets, the radio/CD/DVD (57%) or SAT NAV (41%) are the main culprits. Younger motorists are more likely to be distracted by their mobile phone or car stereo.

using mobile phone



17-44 = 38%
45+ = 23%
Male = 36%
Female = 27%

radio/CD/DVD controls



17-24 = 72%
25+ = 54%

Sat Nav



in-car information & warning lights
65+=31%



heating/air-conditioning controls



adjusting seats

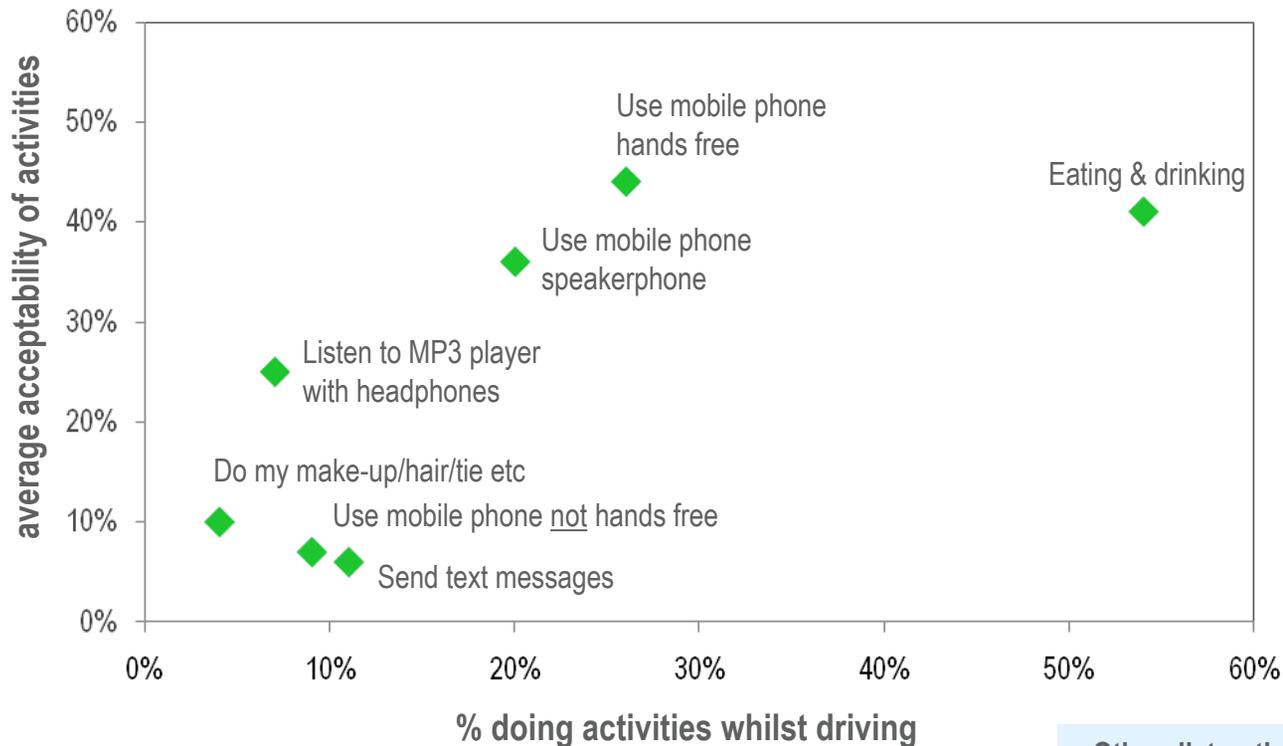
4% None of these distract me

Q24 Which of the following in-car instruments and equipment cause you to become seriously distracted when driving?
Base: all who become seriously distracted whilst driving (n=445)

activities done whilst driving & acceptability

research for decision makers™

Using your mobile phone hands free and eating or drinking are perceived to be the most acceptable activities to do whilst driving. They are also the most frequently done activities whilst driving. Using your phone to call or text not hands free is seen as unacceptable.



The older the motorist the less likely to do activities whilst driving. 17-24 year olds are most likely to do all activities.

The acceptability of each activity increases with age. 17-24 year olds are most likely to say all more acceptable

Females are more likely to occasionally do their hair and make up while driving.

Other distractions are:

- Listening to music
- Singing
- Looking after the dog
- Smoking
- Conversing with passengers
- Map reading
- Looking after children
- Dog
- Reading

Q25 Which of these activities do you do whilst driving?

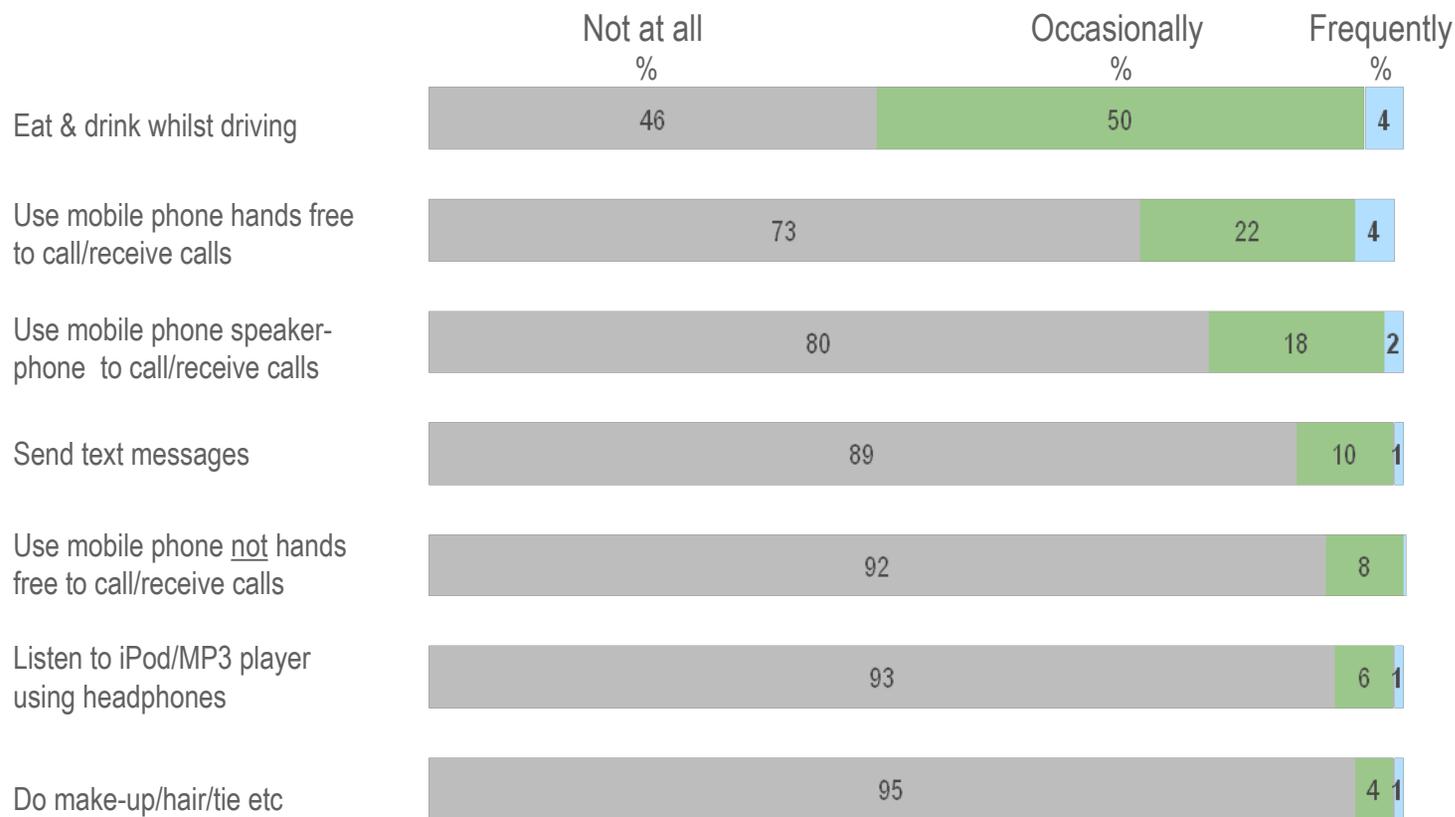
Q26 For each of these activities, how acceptable do you think they are if done whilst driving?

Base: all respondents (n=1,109)

activities done whilst driving

research for decision makers™

Eating and drinking are the most common activities done whilst driving. Approximately one-in-ten use their mobile phone to text or to make calls not hands free whilst driving.

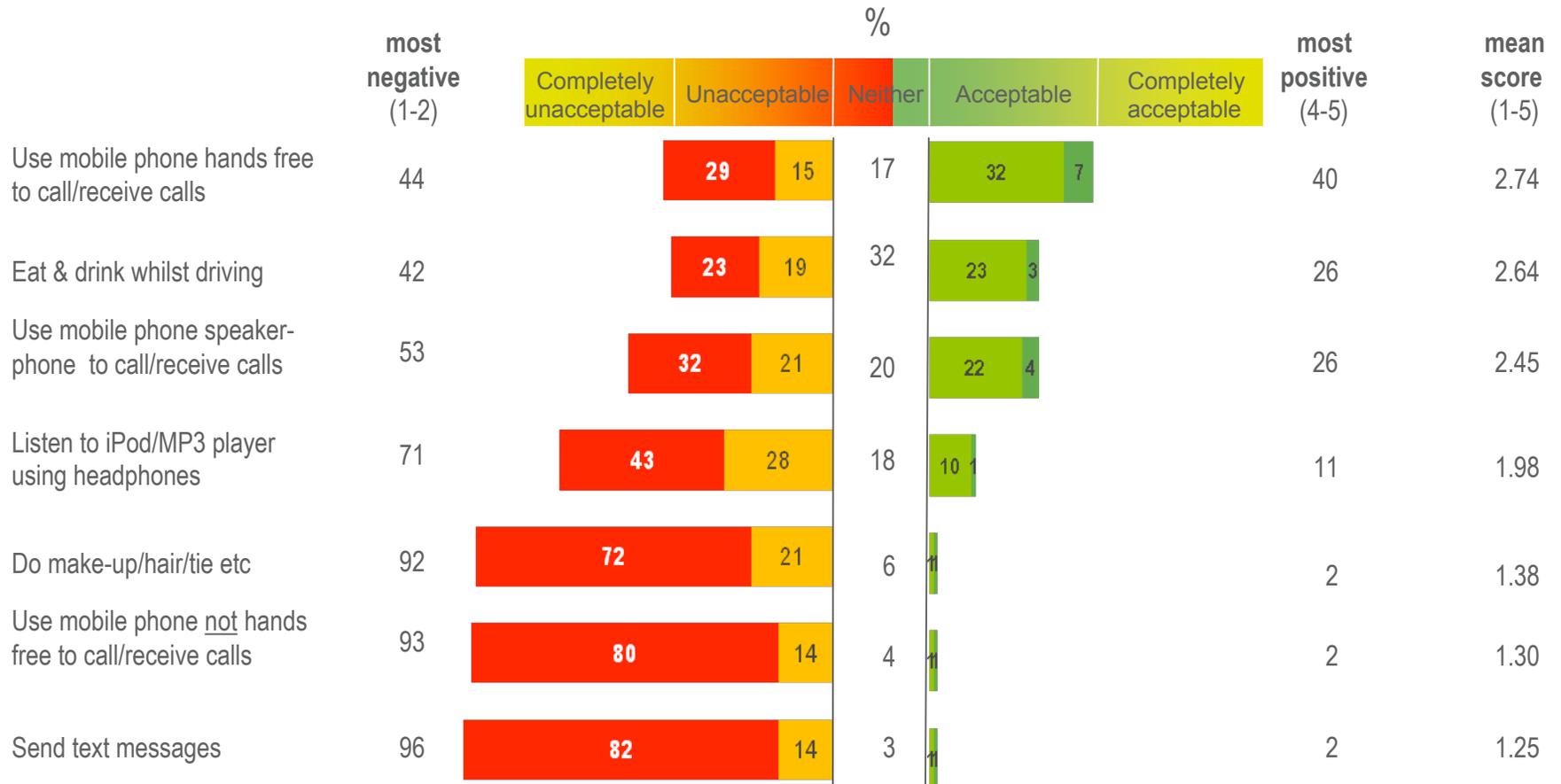


Q25 Which of these activities do you do whilst driving?
Base: all respondents (n=1,109)

acceptability of activities done whilst driving

research for decision makers™

More motorists find it unacceptable (44%) to use a mobile phone hands free than acceptable (40%).
Over nine-in-ten motorists think it is unacceptable to use a mobile phones not hands free to text or call.



Q26 For each of these activities, how acceptable do you think they are if done whilst driving?
Base: all respondents (n=1,109)

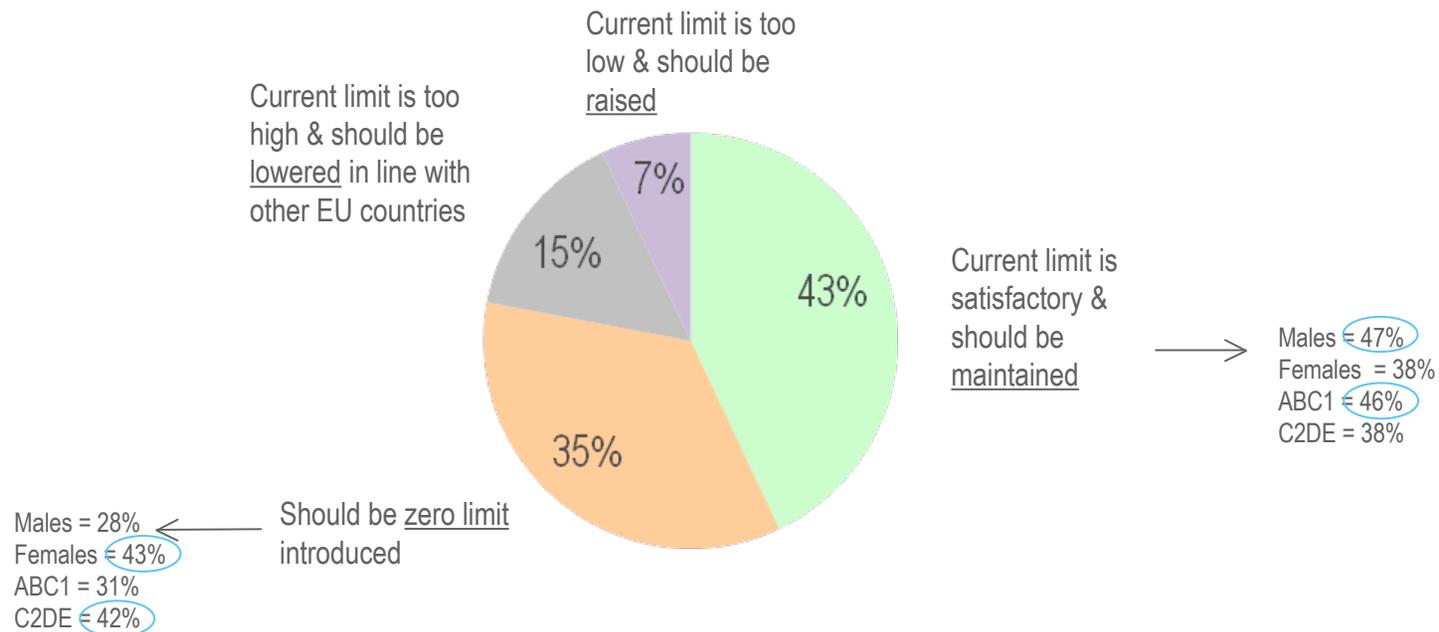


5. drink driving

drink driving limits

research for decision makers™

One-half of motorists feel the current drink driving limit should be lowered in line with other EU countries (15%) or lowered to a zero limit (35%). 43% feel the current limit is satisfactory while only 7% feel the limit should be raised.



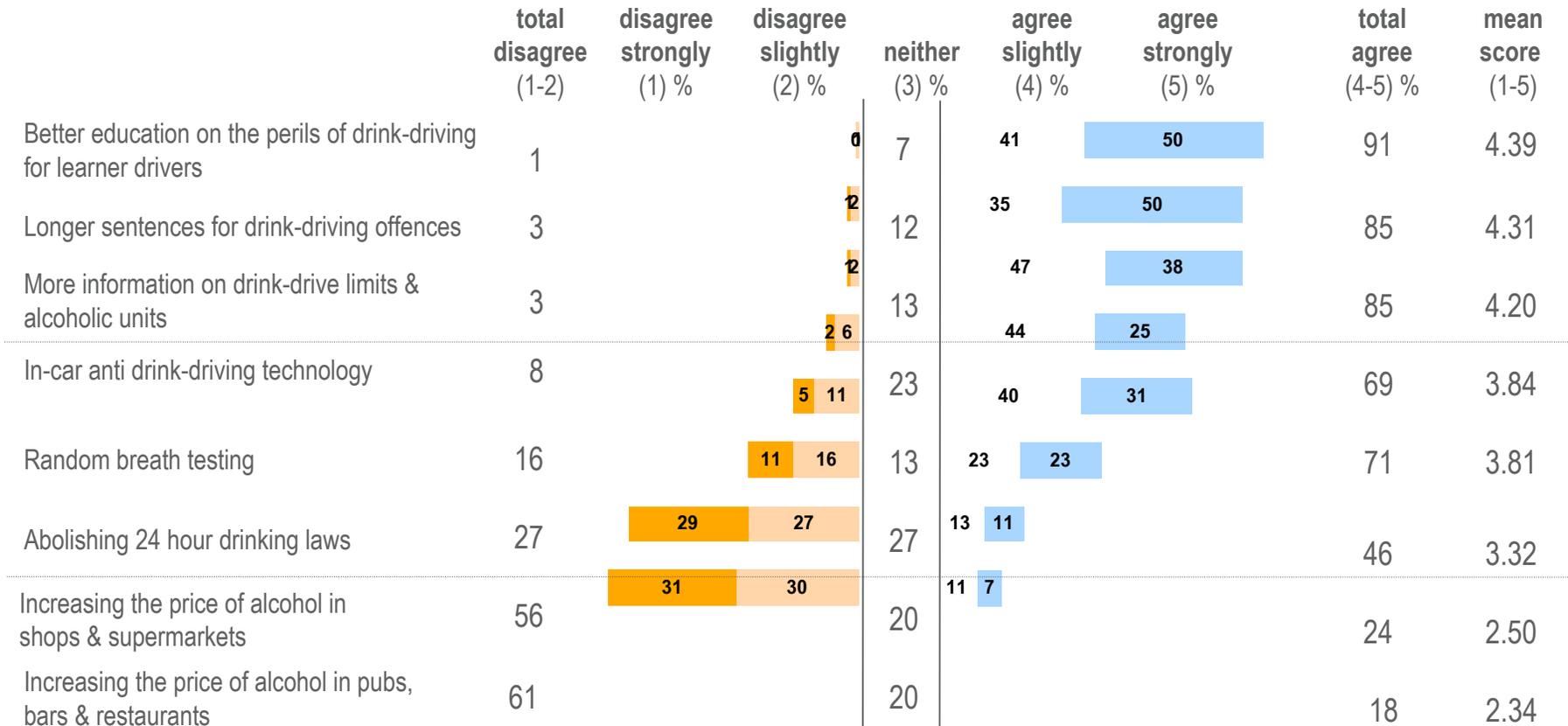
Q29 Which one statement best represents your views on the current drink driving limits in the UK?

Base: all respondents (n=1,109)

drinking and driving

research for decision makers™

Better education, longer sentences and more information about limits and units are the favoured ways of reducing drink driving. Changing drinking laws or increasing alcohol prices are the least favoured.



Q30 There are a number of methods that could be used to reduce drink driving. Please state how acceptable you personally think it would be to implement each approach?
Base: all respondents (n=1,109)

More information on drink-drive limits

17-44 = 87%

45+ = 82%

Females in agreement more than males on all but in-car technology

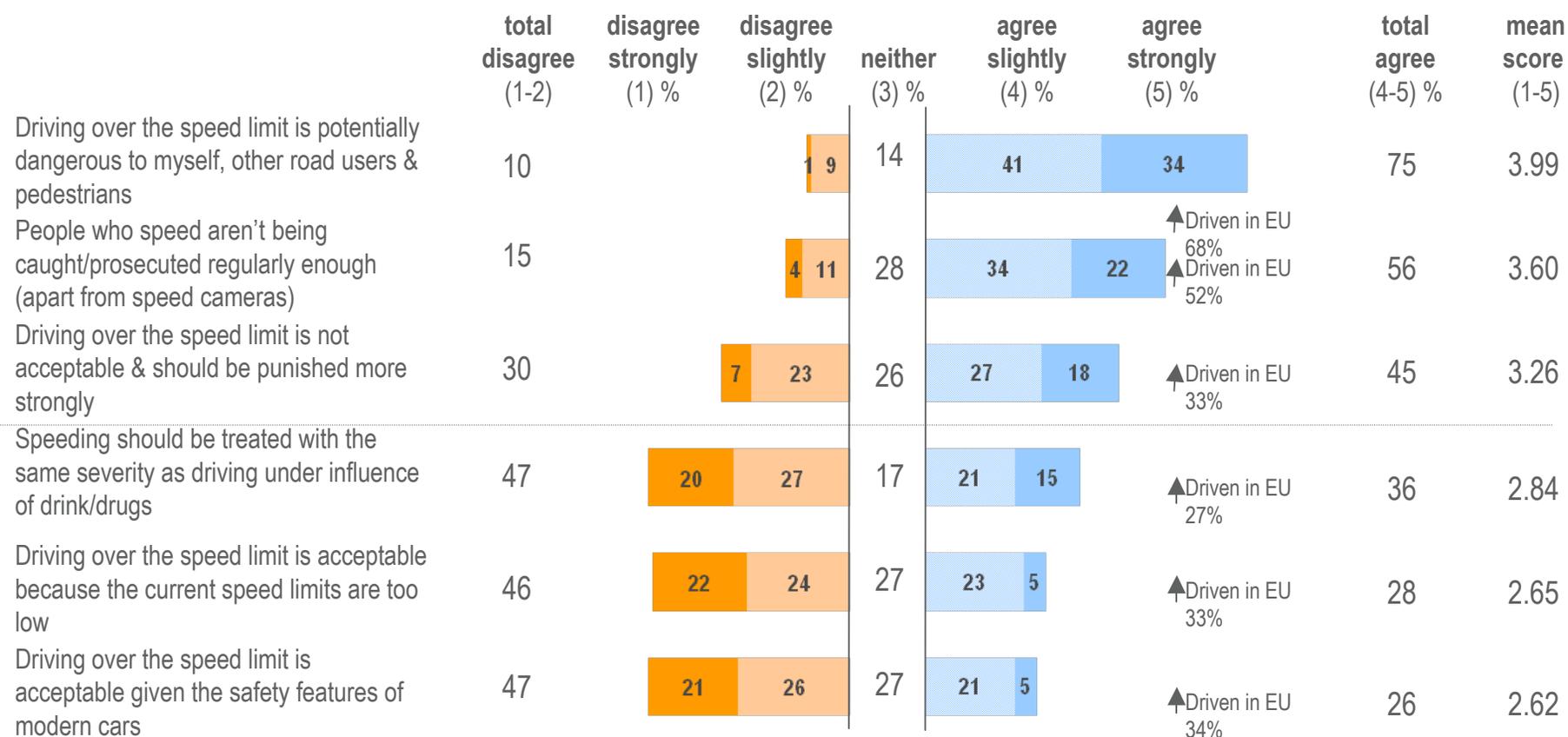


6. speed limits

attitudes towards speed limits

research for decision makers™

Driving over the speed limit is seen to be dangerous by three-quarters and motorists would like to see people being prosecuted and punished more for speeding.

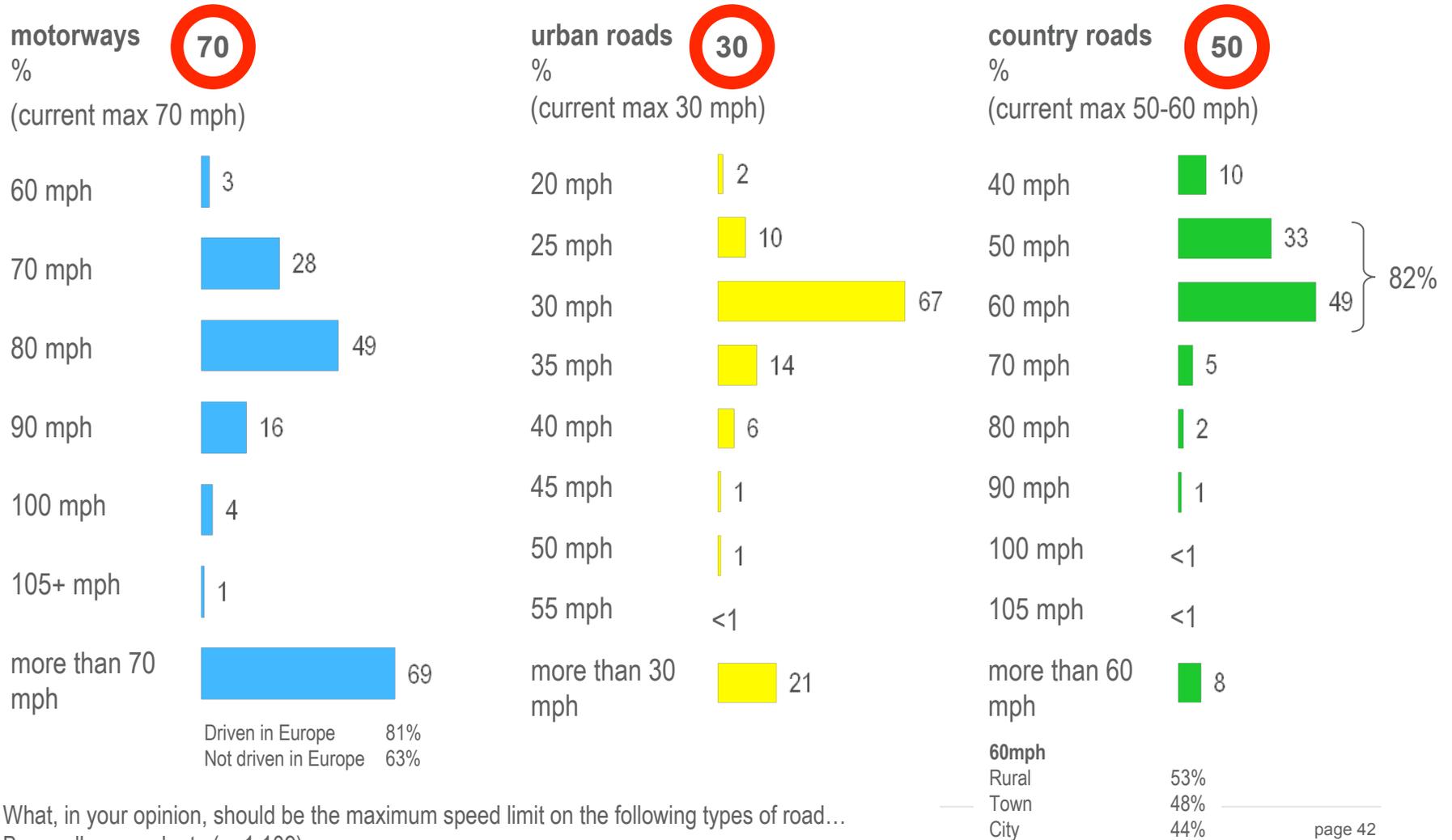


Q34 How strong do you agree with the following statements on speeding?
 Base: all respondents (n=1,109)

opinion of maximum speed limits

research for decision makers™

Motorways are the type of road where motorists feel the speed limit is too low with almost one-half (49%) saying 80mph would be the appropriate limit. The majority of motorists feel the speed limits on urban and country roads are about right. No significant differences from Report 1 2008.

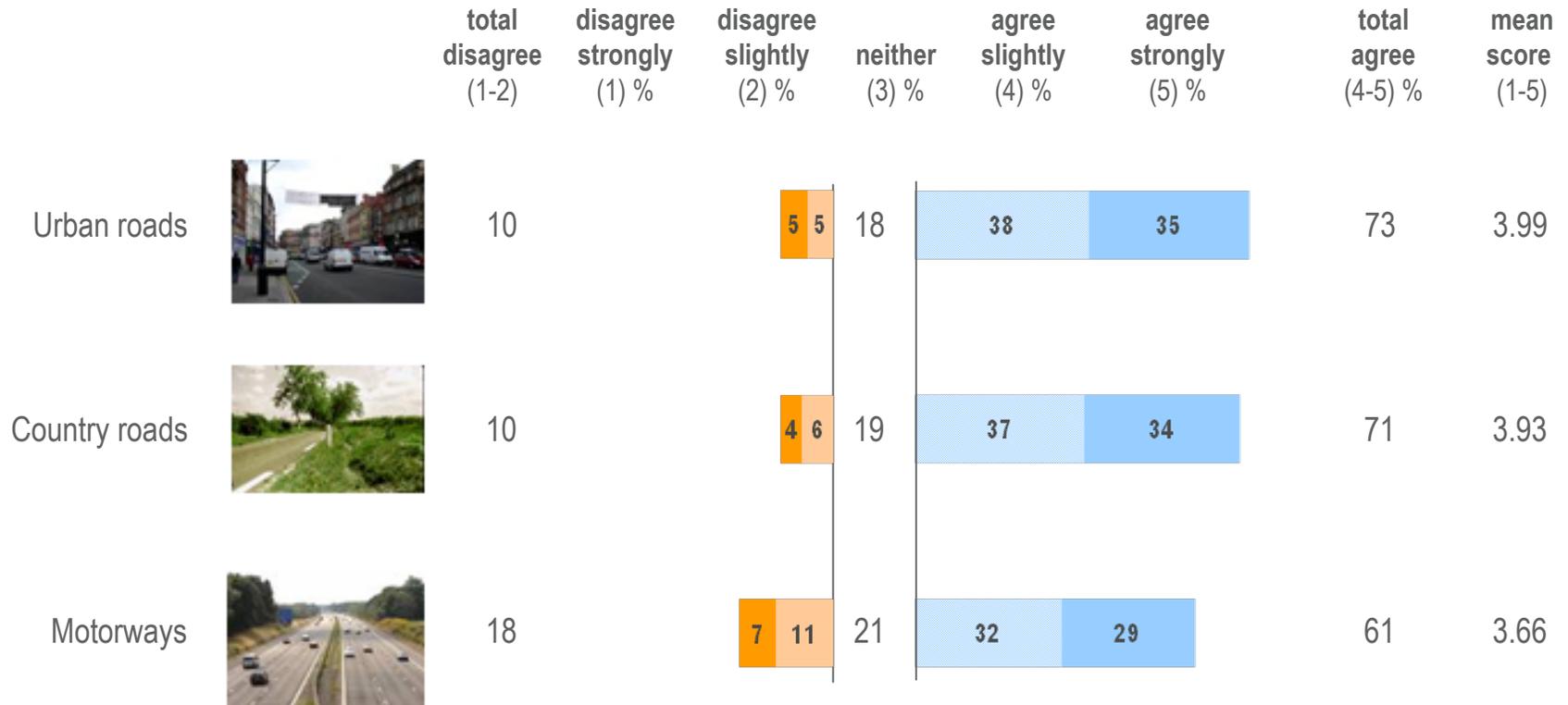


Q32 What, in your opinion, should be the maximum speed limit on the following types of road...
Base: all respondents (n=1,109)

blanket speed limits

research for decision makers™

Overall, a majority of UK motorists agree (73%-61%) that speed limits should be related to the risk of accident on the individual road rather than a blanket limit.



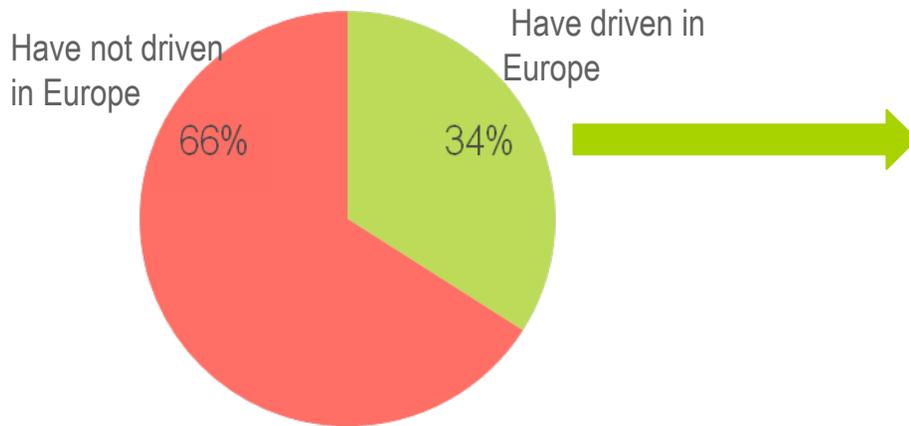
Q33 How strongly do you agree or disagree with the idea that speed limits should be related to the risk of accident on the individual road rather than a blanket limit to all roads in the category?

Base: all respondents (n=1,109)



7. driving in the EU

One-third of motorists have driven in Europe in the past five years. France and Spain are the countries that UK motorists drive in most



	Have driven %
17-24 yrs old	14
25+ yrs old	37
Males	45
Females	22



Q35 In the past five years have you personally driven on road networks in other European countries? Base: all respondents (n=1,109)

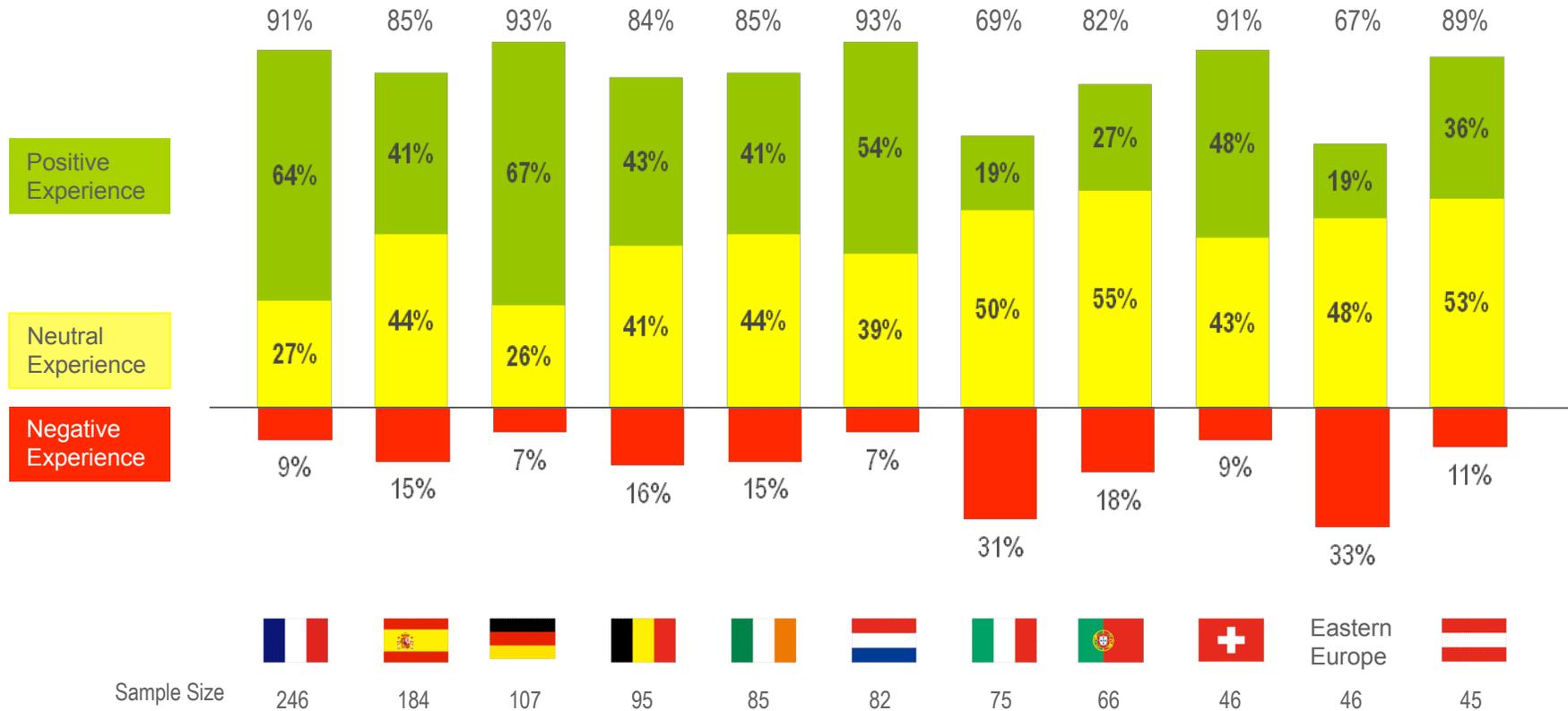
Q36 Please select which countries you have personally driven in the past five years.

Base: all respondents who have driven in Europe in past five years (n=379)

European driving experience

research for decision makers™

The highest proportion of negative driving experiences are in Italy and Eastern Europe while Germany and France are the most positive.



Sample Size
Those who have driven in each country

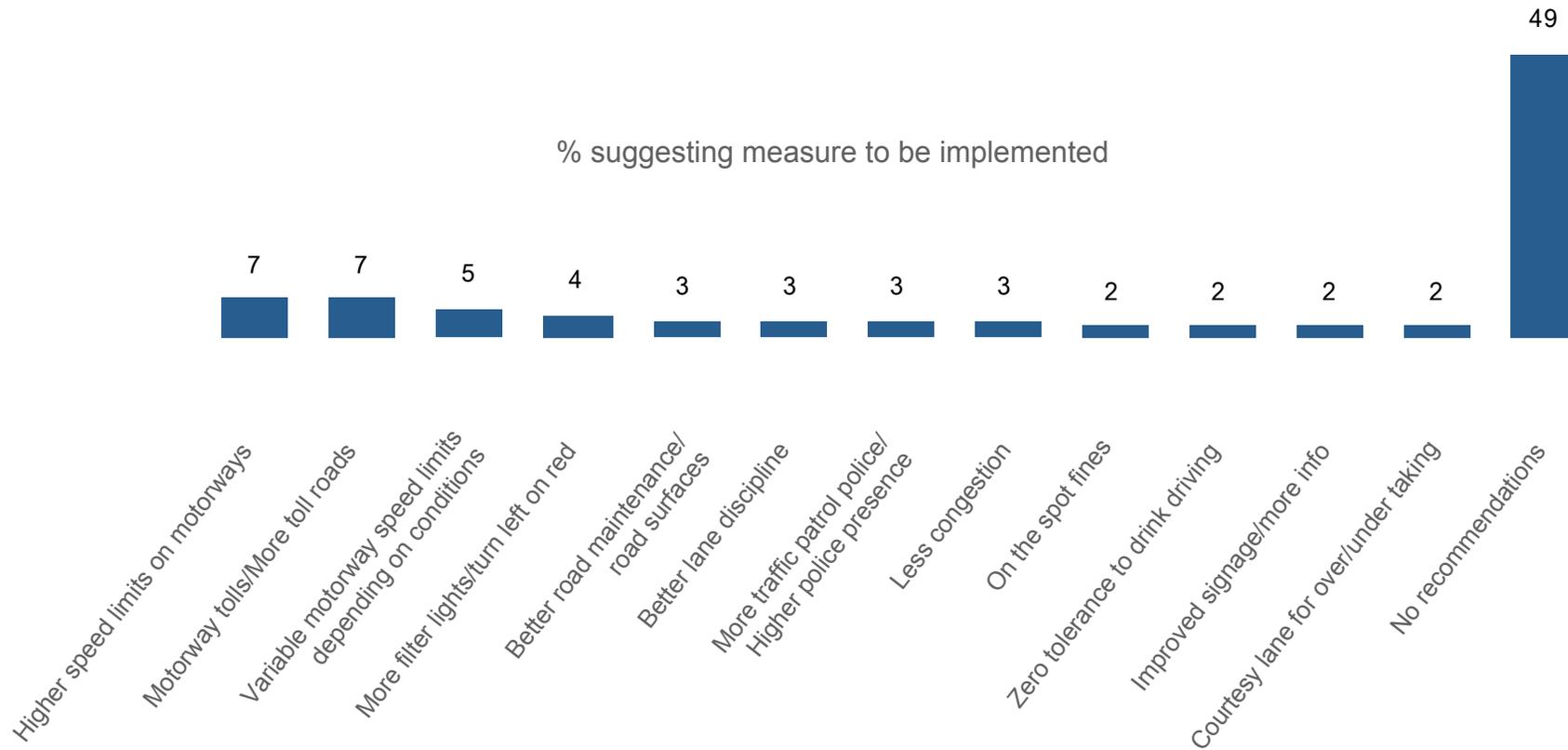
246	184	107	95	85	82	75	66	46	46	45
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Q36 Please select which countries you have personally driven in the past five years. For those where you have driven please indicate whether your driving experience was positive, neutral or negative?
Base: those who have driven in each country

suggestions based on driving in europe

research for decision makers™

Higher speed limits and more toll roads are the most recommended changes among those who have driven in Europe in the past five years.



Q37 What measures (if any) would you like to see implemented in the UK that you've experienced abroad?
Base: respondents who have driven in EU in the past 5 years (n=379)

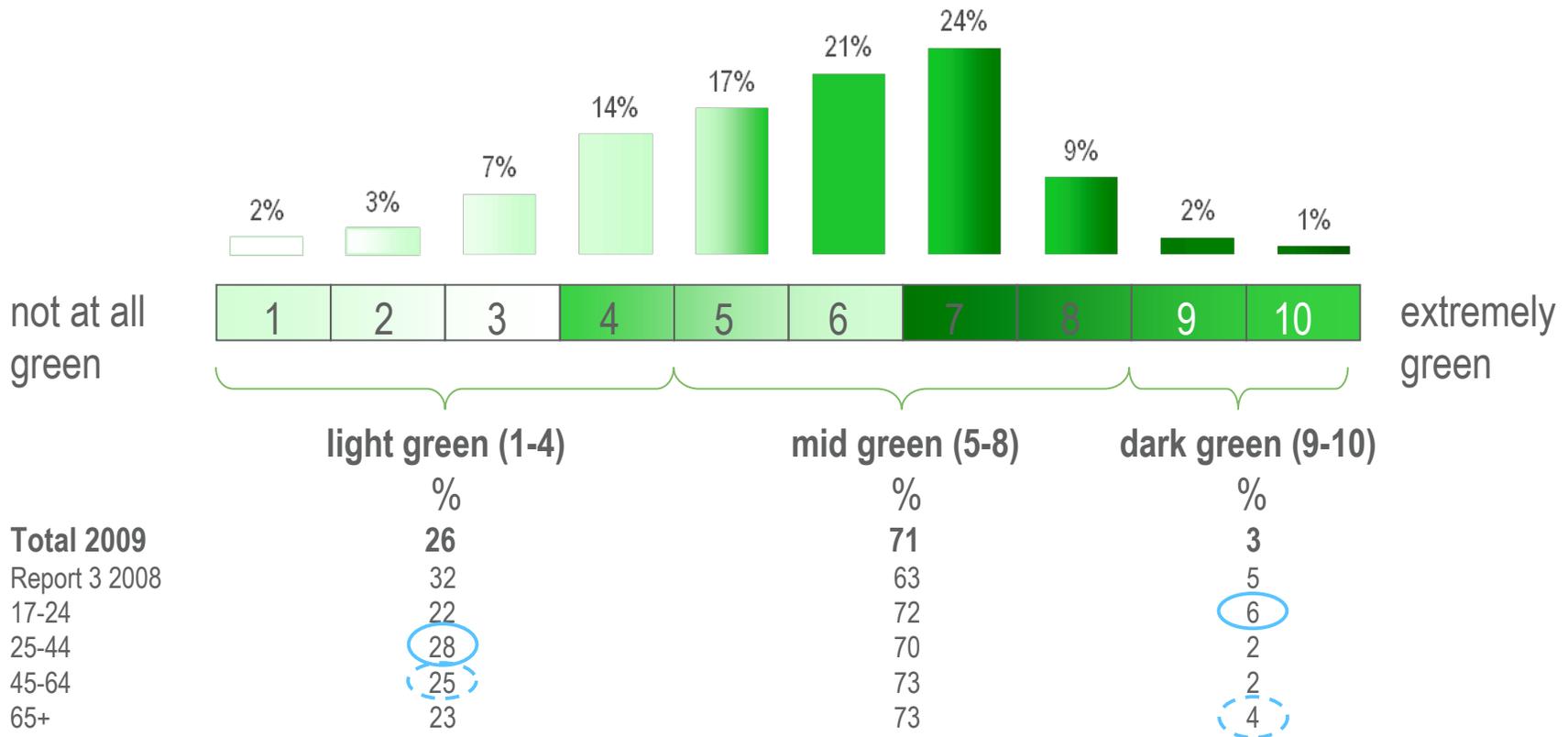


8. the environment and my driving

self as a 'green' driver

research for decision makers™

Motorists think of themselves as 'average' when it comes to being a green driver with most scoring themselves 5, 6, or 7 out of 10. Younger motorists are most likely to think of themselves as more green. There has been an increase in 'mid-green' from 63% in 2008 to 71% in 2009.

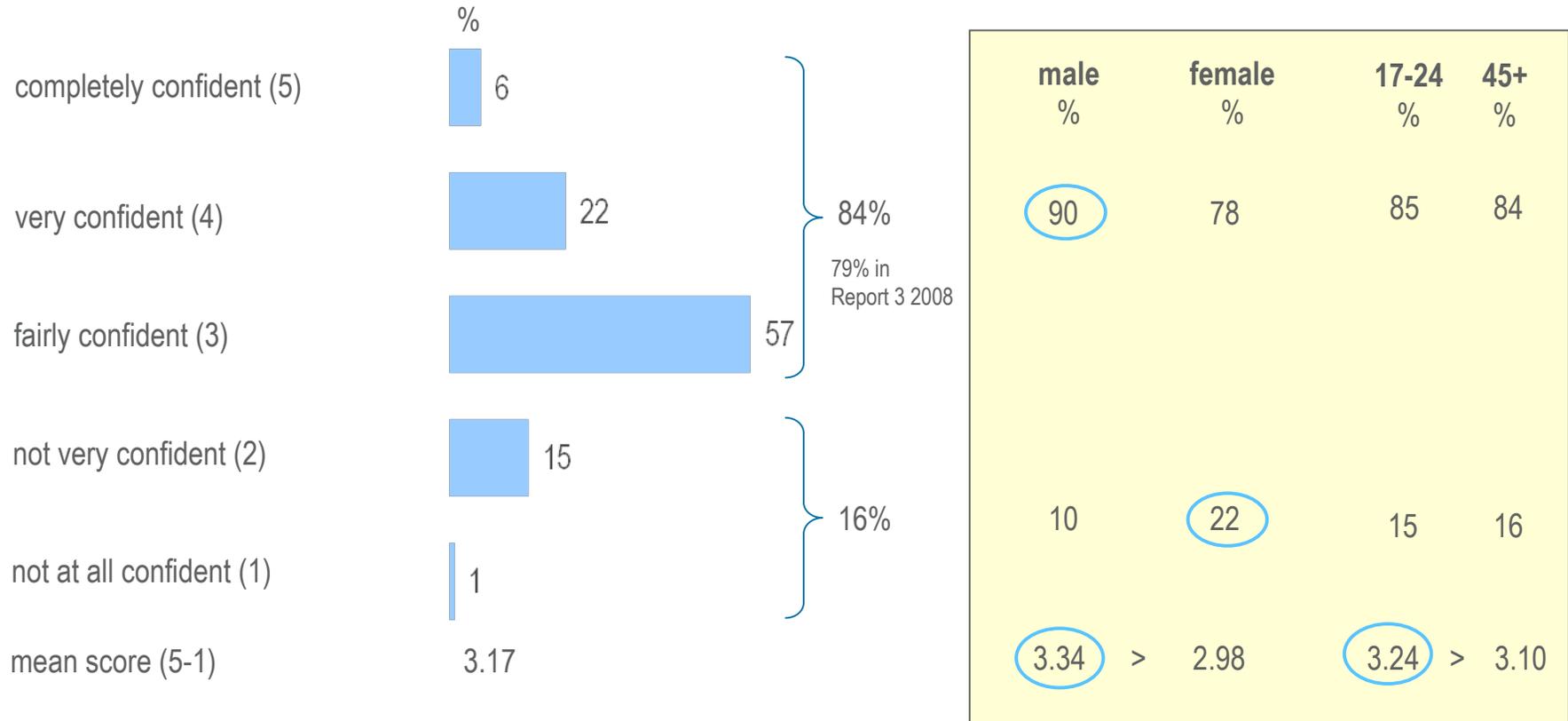


Q43 To what extent do you think of yourself as a 'green' driver?
Base: all respondents (n=1,109)

understanding how to be a 'green' driver

research for decision makers™

A majority of motorists (57%) are fairly confident about understanding how to be a green driver. Males and those aged 17 to 24 are more confident about how to be a green driver. There is a slight increase in confidence (5%) since 2008.

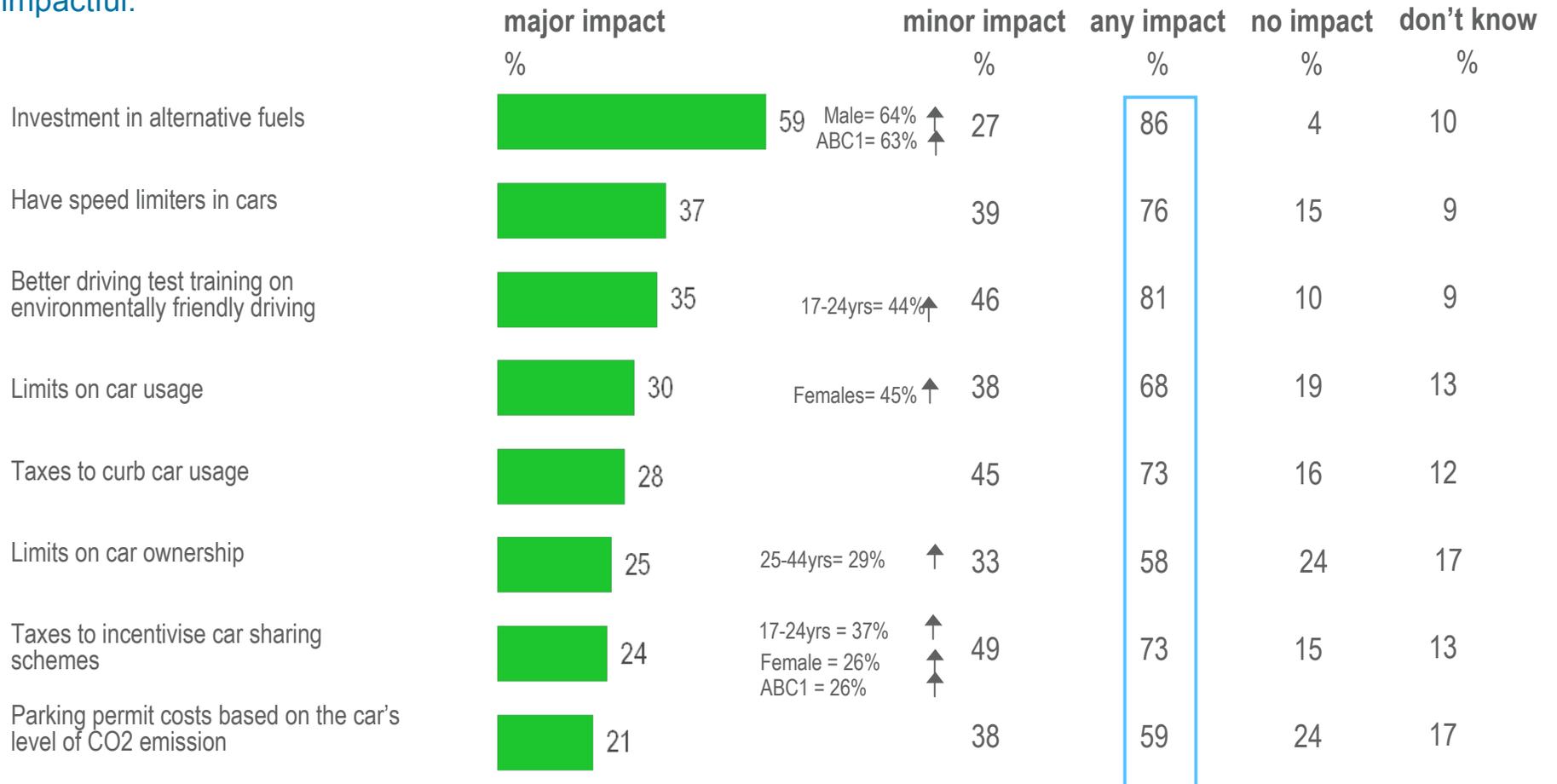


Q44 How confident are you that you understand how to be a 'green' driver – i.e. driving in an environmentally friendly manner?
Base: all respondents (n=1,109)

changes to become more environmentally friendly

research for decision makers™

Investing in alternative fuels is seen as the most impactful way of making motoring more environmentally friendly 20 years from now. Limits on car ownership and parking are seen as least impactful.



Q45 What are the main changes that need to happen now, in order to have an impact on making motoring more environmentally friendly 20 years from now?
Base: all respondents (n=1,109)

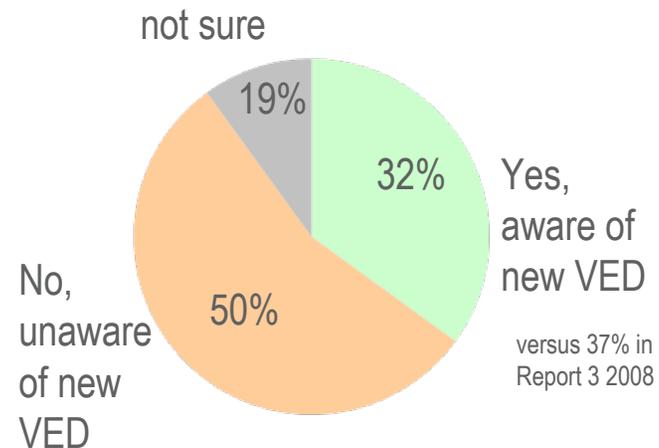
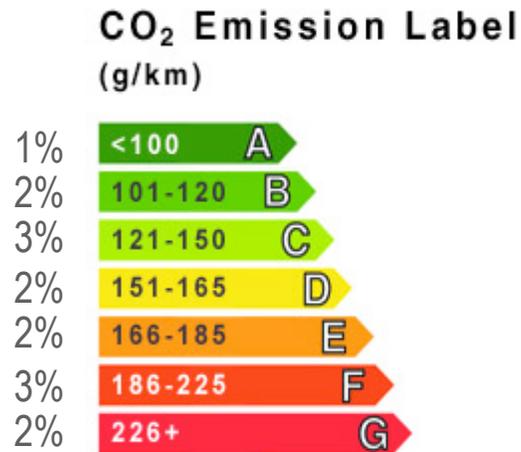
awareness of CO2 emission bands

research for decision makers™

A strong majority of motorists (85%) are unaware of what CO2 band their vehicle falls into under the current system.

Approximately one-third of motorists (35%) are aware of the new tax bands that the Government is introducing in 2009.

Overall, CO2 emission bands on cars is an area of low awareness among motorists.



85% Don't know CO2 band

Q9 What band of CO2 emissions is your car?
Base: respondents with car registered after March 1st 2001 (n=261)

Q10 Are you aware of the new Road Tax (VED) bands A-M?
Base: all respondents (n=1,109)



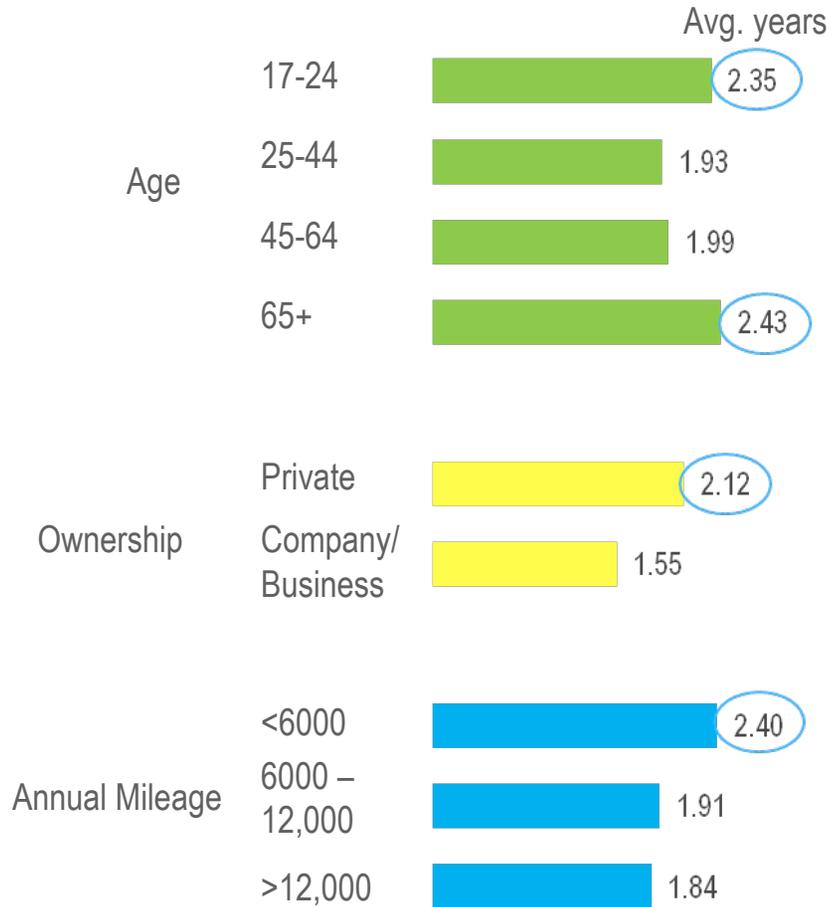
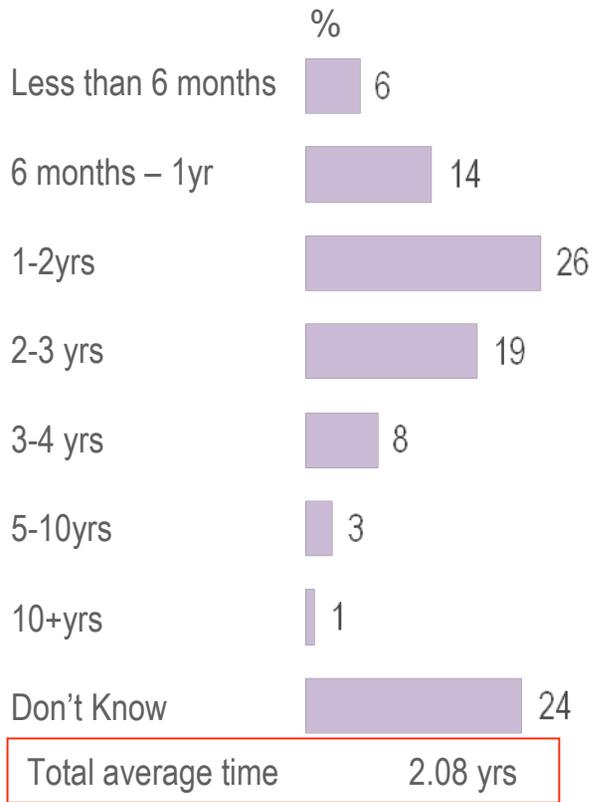
9. the environment and my car

vehicle replacement intention period

research for decision makers™

On average UK motorists will replace their vehicles in just over 2 years. However, one-quarter don't know when they will purchase again. Those who are 'middle-aged', have a company car or drive more than 6000 miles in a year are all likely to purchase a new vehicle in under two years.

Average age of current car is 5.6 years

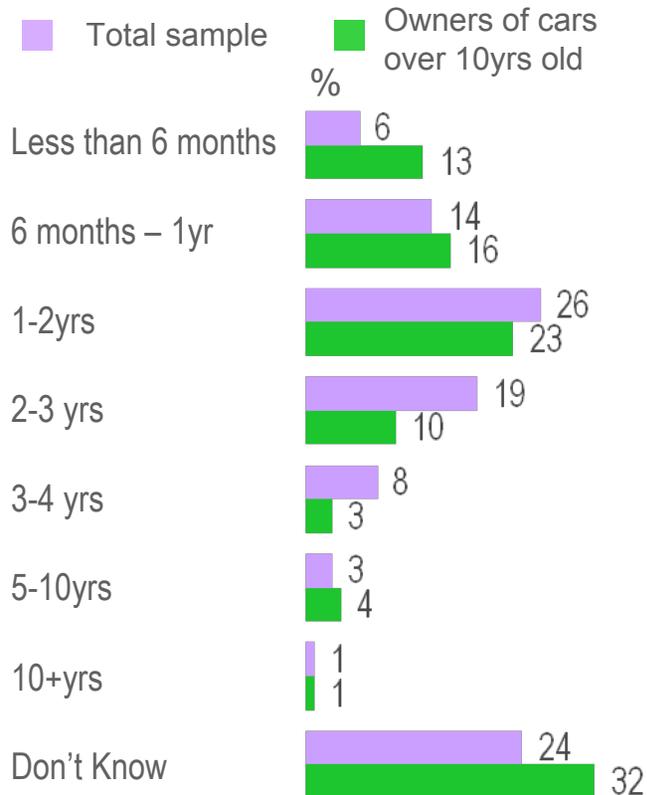


Q38 When do you intend to replace your current car?
Base: all respondents (n=1,109)

vehicle replacement intention period

research for decision makers™

On average UK motorists will replace their vehicles in just over 2 years. Those who have owned their vehicle for over 10 years will replace in a slightly shorter period of time. However, a greater proportion don't know.



Total average time	2.08 yrs
10+ yrs average time	1.81 yrs

Ten year old cars are more likely to be owned by:

Not working	15%
Working	11%
Private	13%
Company/Business	5%
Low mileage per year	18%
Medium mileage per year	10%
High mileage per year	5%

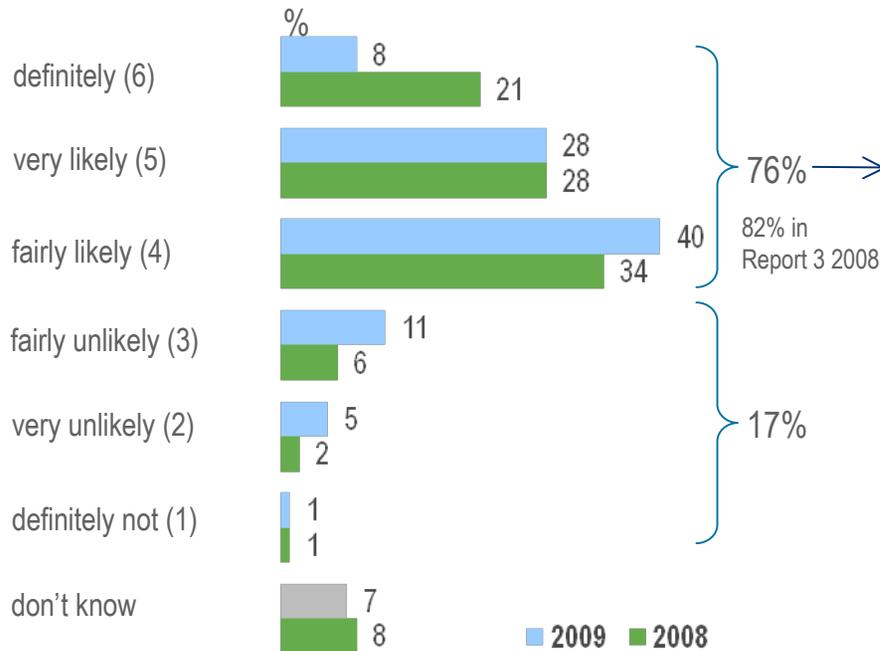
environmentally friendly car intention

research for decision makers™

Consumers are likely to consider an environmentally friendly car when they next purchase with 36% definitely or very likely to consider. Most (58%) will consider a more efficient car or with reduced CO2 emissions (46%). Compared to 2008 there is a significant reduction (from 21% to 8%) in the proportion of motorists who will 'definitely' consider an environmentally friendly car.

Q39 Thinking about the next time you come to buy a car, how likely or unlikely are you to consider buying a more environmentally friendly car?

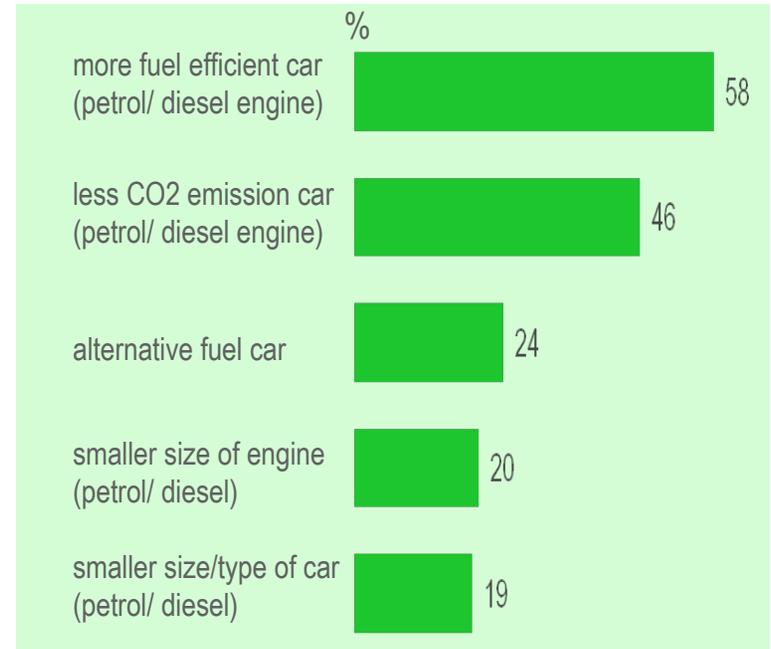
Base: all respondents (n=1,109), Report 3 2008 (n=1,040)



mean score (1-6) 4.21

Q40 Which type of car would you be most likely to change to?

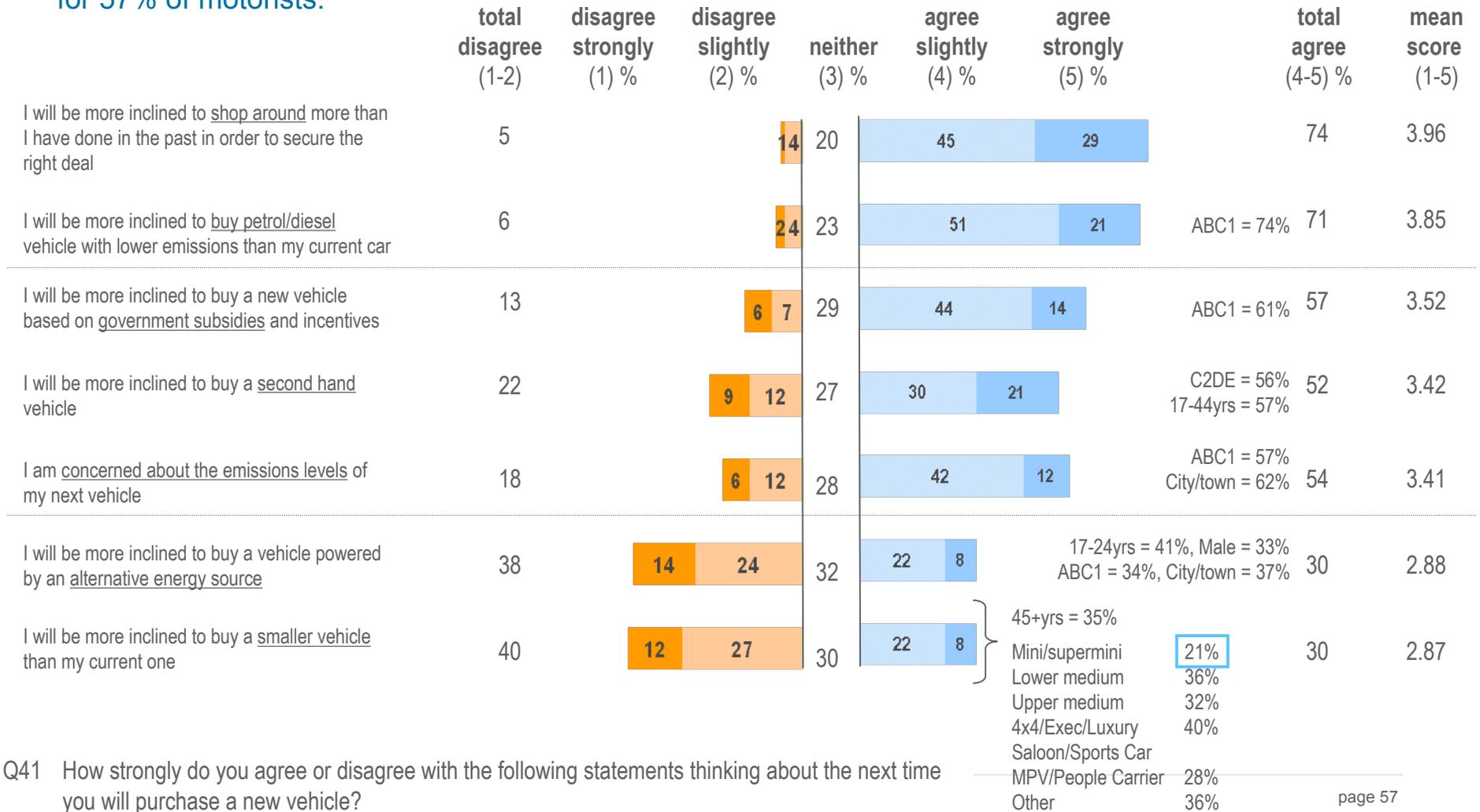
Base: All who would be likely to buy a more environmentally friendly car (n=840)



environmental considerations when buying

research for decision makers™

Over one-half (54%) are concerned about the emission levels of their next vehicle but aren't necessarily willing to change the vehicle they were planning on purchasing by buying smaller car (31%) or hybrid (30%). A car scrappage subsidy creates motivation to purchase a more environmentally friendly vehicle for 57% of motorists.

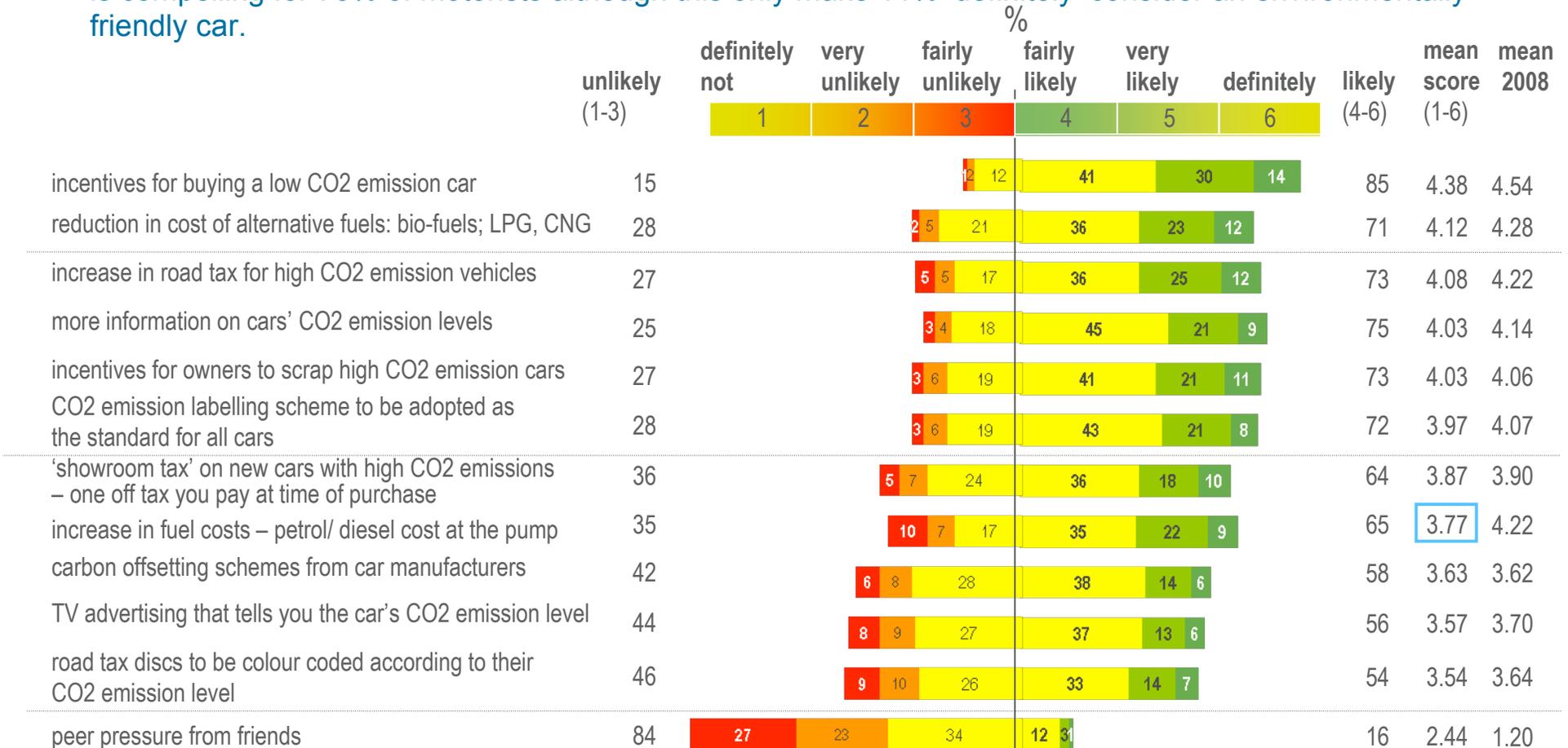


Q41 How strongly do you agree or disagree with the following statements thinking about the next time you will purchase a new vehicle?
Base: all respondents (n=1,109)

influencing consideration of buying a more environmentally friendly car

research for decision makers™

Incentives for a buying a low emission car are the most compelling for motorists. A scrappage incentive is compelling for 73% of motorists although this only make 11% 'definitely' consider an environmentally friendly car.



Q42 To what extent would the following make you likely to consider buying a more environmentally friendly car?
Base: all respondents (n=1,109)



10. taxation & cost to the motorist

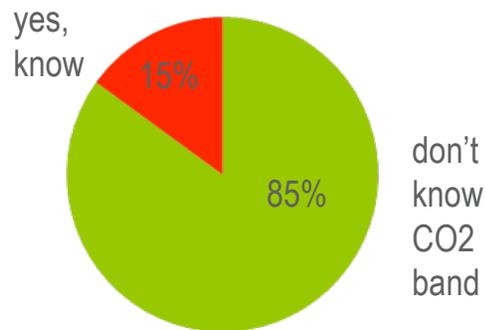
awareness, understanding and agreement with new Road Tax bands

research for decision makers™

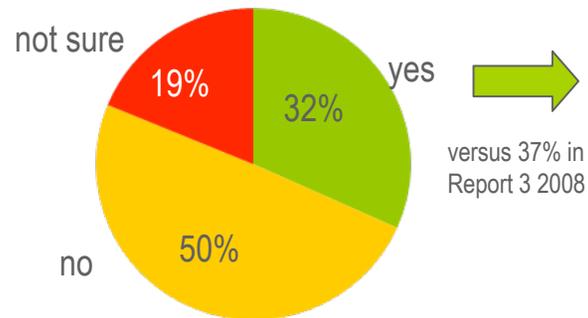
Just less than one-third (32%) are aware of the new Road Tax bands and one-half feel they understand the bands. There is no strong agreement or disagreement towards the new tax.

At the 2008 Budget, the Chancellor announced a change to the car Road Tax bands (also known as Vehicle Excise Duty/ VED ratings). This year six **new** bands will be introduced. If your car is registered after 1 March 2001, there will be a series of car road tax bands (A-M) which will be based on fuel type and CO2 emission levels.

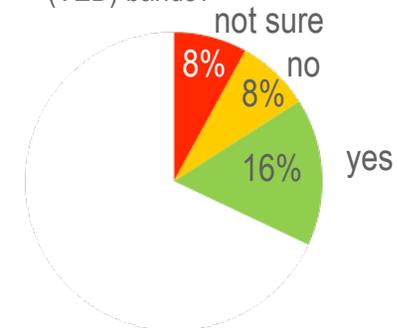
Q9 What band of CO2 emissions is your car?
Base: respondents with car registered after March 1st 2001 (n=261)



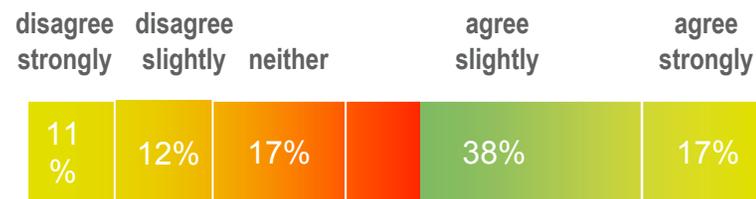
Q10 Are you aware of the **new** Road Tax (VED) bands A – M



Q11 Do you understand the **new** Road Tax (VED) bands?



Q12 How strongly do you agree or disagree with the introduction of the new Road Tax (VED) bands which base road tax on fuel type and CO2 emission levels?



Base: all respondents (n=1,109)

taxation preferences

research for decision makers™

The most preferred system which the Government could introduce is to pay a one-off tax fee at the time of purchase and road toll taxes. Maintaining the current taxation system for motorists is the second most preferred.

	Order of preference				
	First	Second	Third	Least	
Emulate systems used on the continent, pay a one-off tax fee at the time of purchase and road toll taxes	38%	25%	20%	17%	45yrs+= 47% ↑
Maintain the current system of fuel duty, road tax, VAT, toll roads etc.	22%	29%	28%	21%	25-44yrs= 32% ↑
Tax motorists per gram of CO2 rather than per litre of petrol consumed	16%	26%	34%	24%	
Tax motorists based on per mile driven, at what time and on what roads they drive on rather than the present blanket system of taxation of all motorists	23%	20%	19%	38%	17-44yrs = 49% ↑ Female = 43% ↑

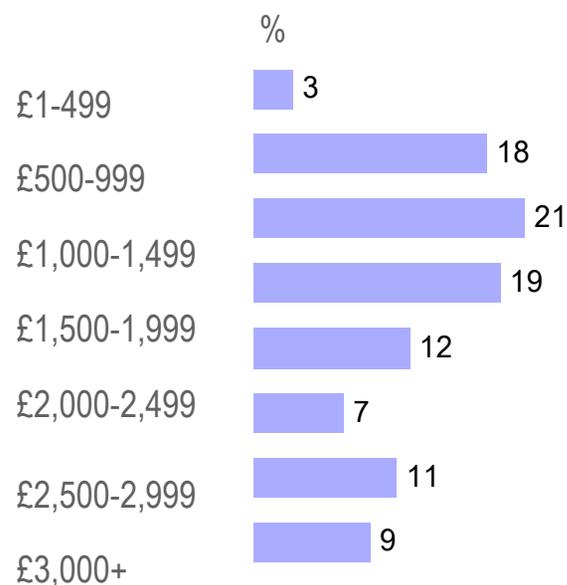
Q13 Thinking about different ways of taxing motorists, which of the following would you prefer to see introduced by the Government with regards to taxing the motorist?
Base: all respondents (n=1,109)

annual cost of motoring and proportion of tax

research for decision makers™

Motorists feel it costs them £1835 on average to keep their vehicle on the road for one year, 67% of which is tax or over £1000.

Q14 How much would you estimate it costs to keep your main vehicle on the road each year? Please think about insurance, tax, petrol, maintenance, M.O.T., etc when thinking about costs but do not include depreciation of your vehicle.

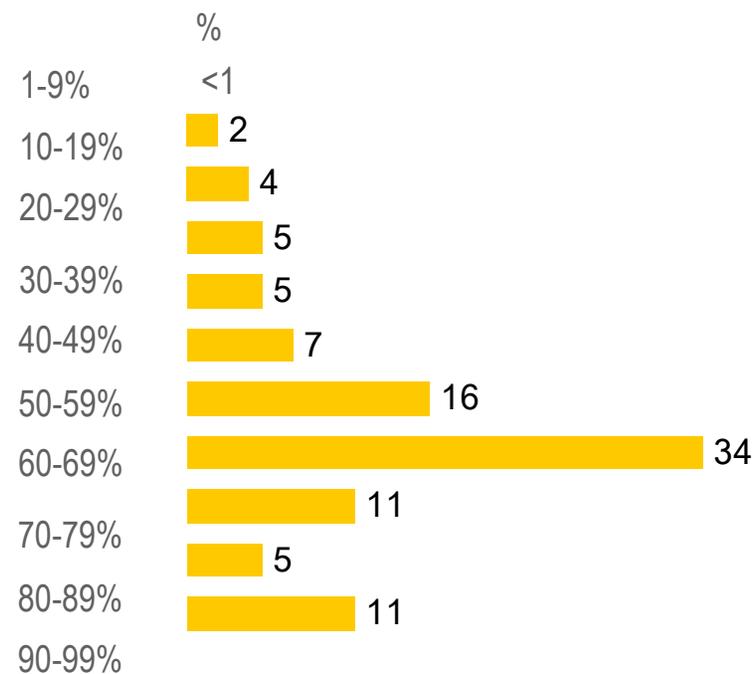


Don't know

Average = £1835 per year

Base: all respondents (n=1,109)

Q15 What percentage of your annual motoring cost, including insurance, tax, petrol, maintenance, M.O.T., would you estimate goes in tax to the government?



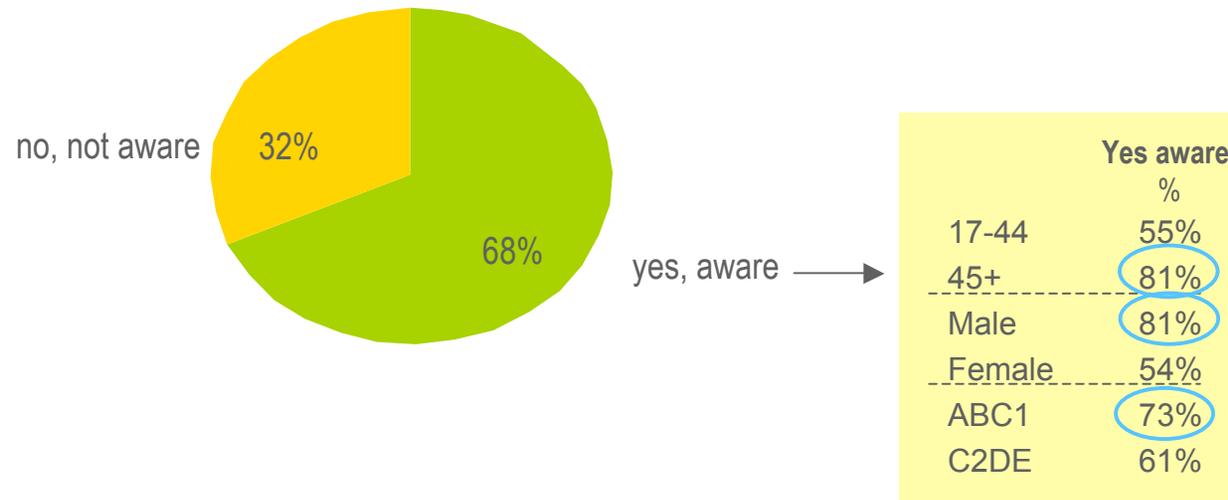
Don't know

Average = 67%

awareness of motorist tax spending

research for decision makers™

Over two-thirds of motorists (68%) are aware that a large proportion of tax revenues raised from motorists are spent elsewhere in the economy apart from on transport.



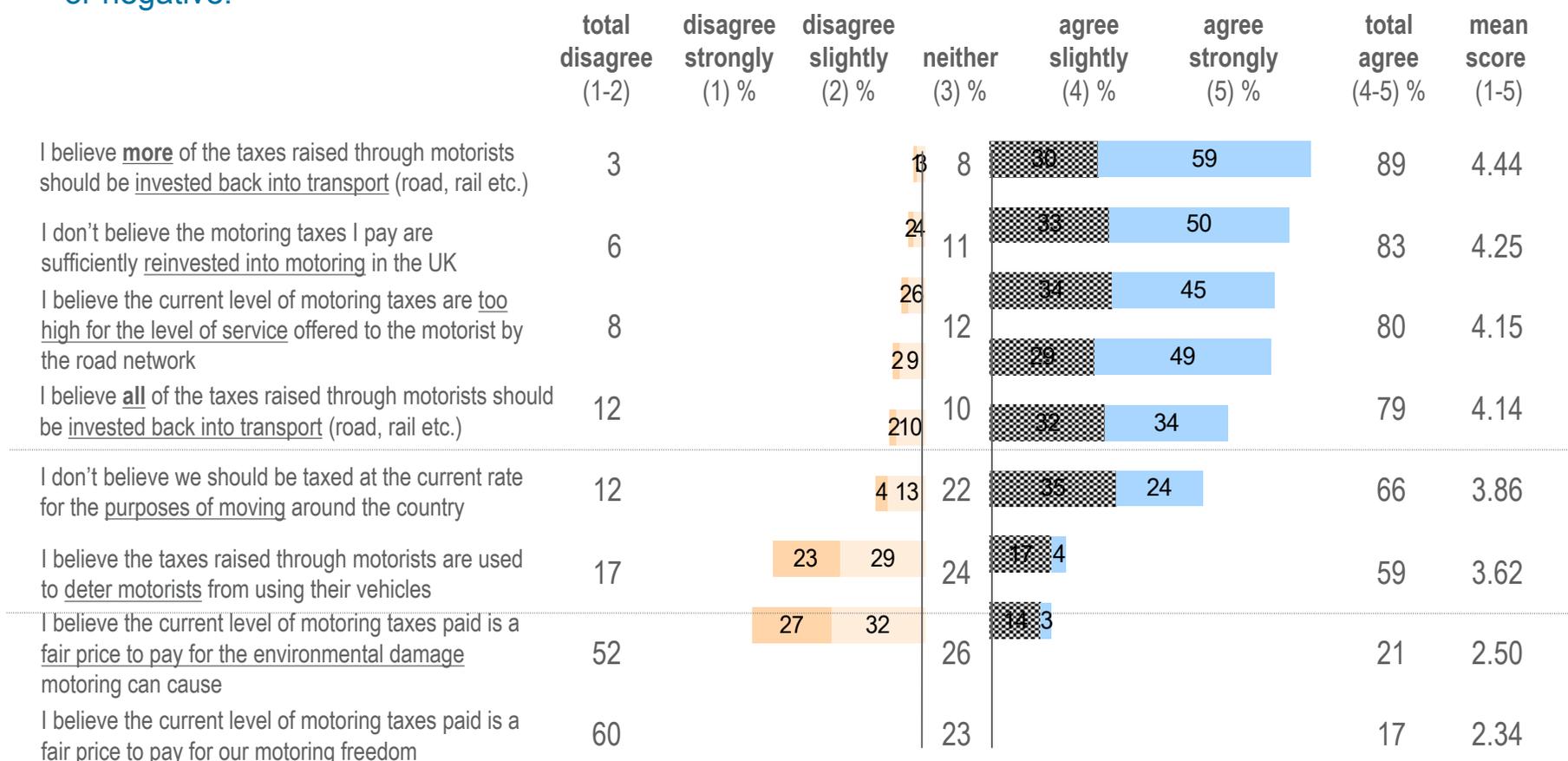
Q16a Are you aware that a large proportion of tax revenues raised from motorists are spent elsewhere in the economy apart from on transport?

Base: all respondents (n=1,109)

attitudes towards motorist tax spending

research for decision makers™

89% agree that more of the taxes raised through motoring should be invested back into transport. There is higher agreement for statements pointing towards dissatisfaction with taxes whether positive or negative.



Q16b Knowing that a large proportion of tax revenue raised from motorists is spent on other areas apart from on transport, how strongly do you agree or disagree with the following statements?

Base: all respondents (n=1,109)

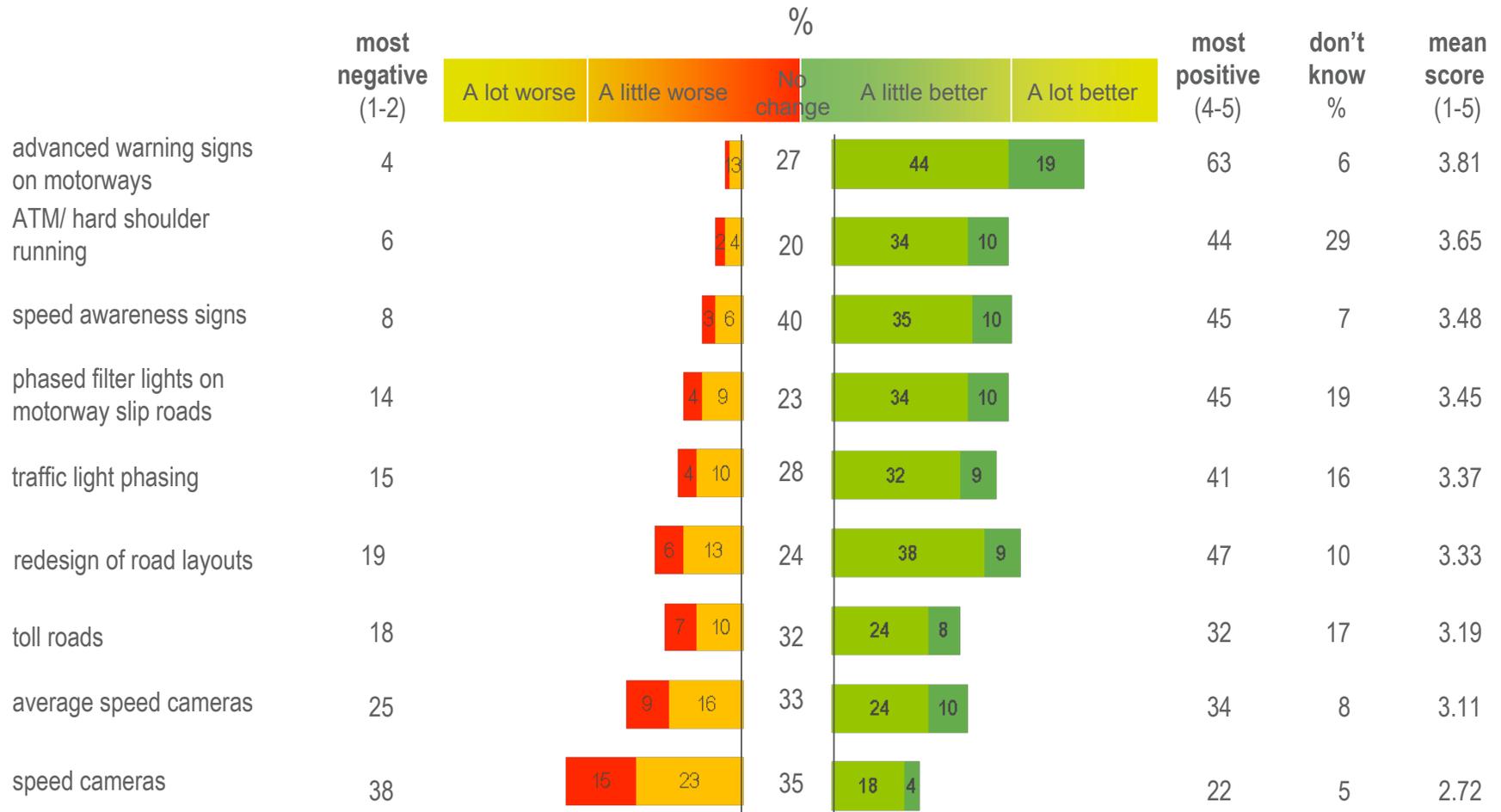


11. congestion on the roads

effect of technology on traffic management

research for decision makers™

Advanced warning signs are perceived to be the most positive technology in affecting traffic management. Speed cameras are seen in the least positive light for helping congestion.

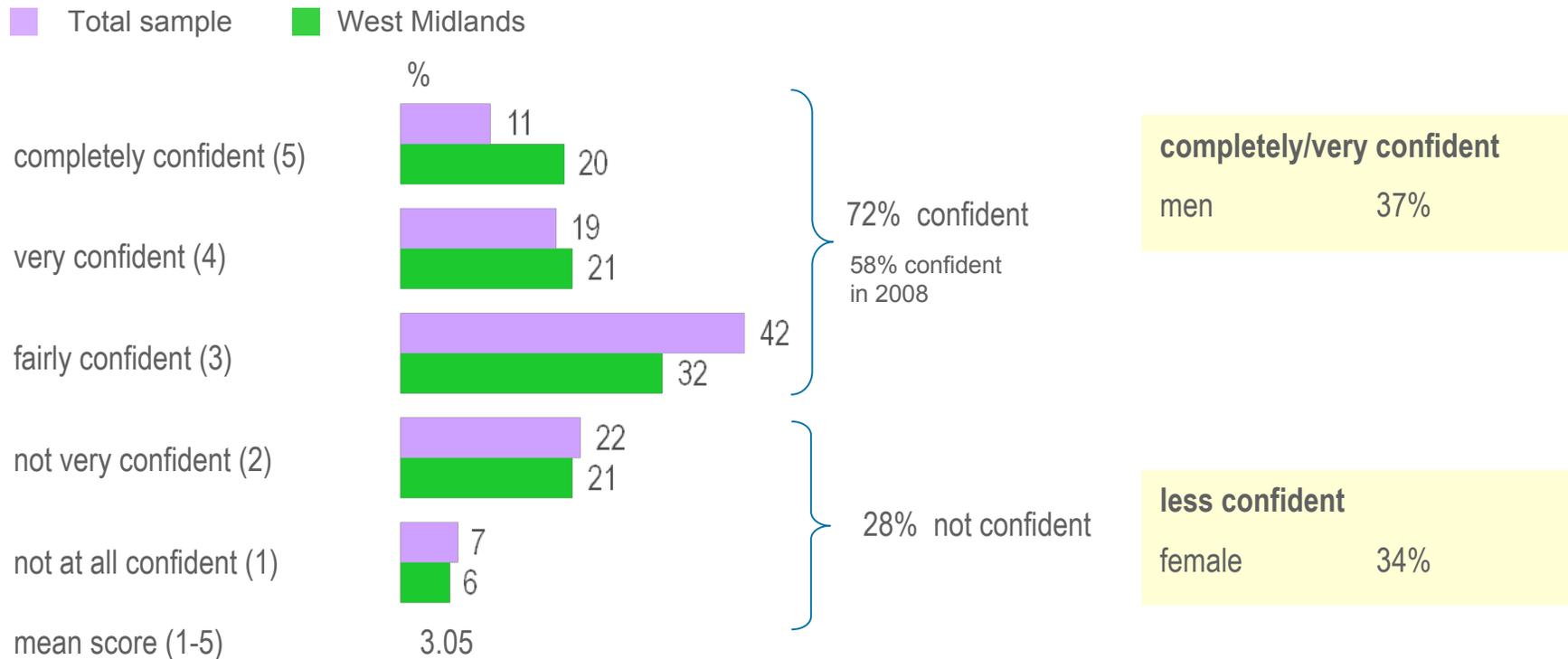


Q18 How have the following technologies affected traffic management and congestion on UK roads?
Base: all respondents (n=1,109)

confidence in driving properly through active traffic management

research for decision makers™

Motorists are confident that they would know how to drive through ATM although most are only 'fairly' confident. This is an increase in confidence since 2008 when 58% were confident – the increase is mainly among those who are fairly confident at the expense of those who are not at all confident.



Q17 Schemes to use Active Traffic Management (ATM) at a national level have recently been approved as a method to reduce traffic congestion. How confident are you that you know (or would know) how to drive properly through Active Traffic Management/ hard shoulder running?

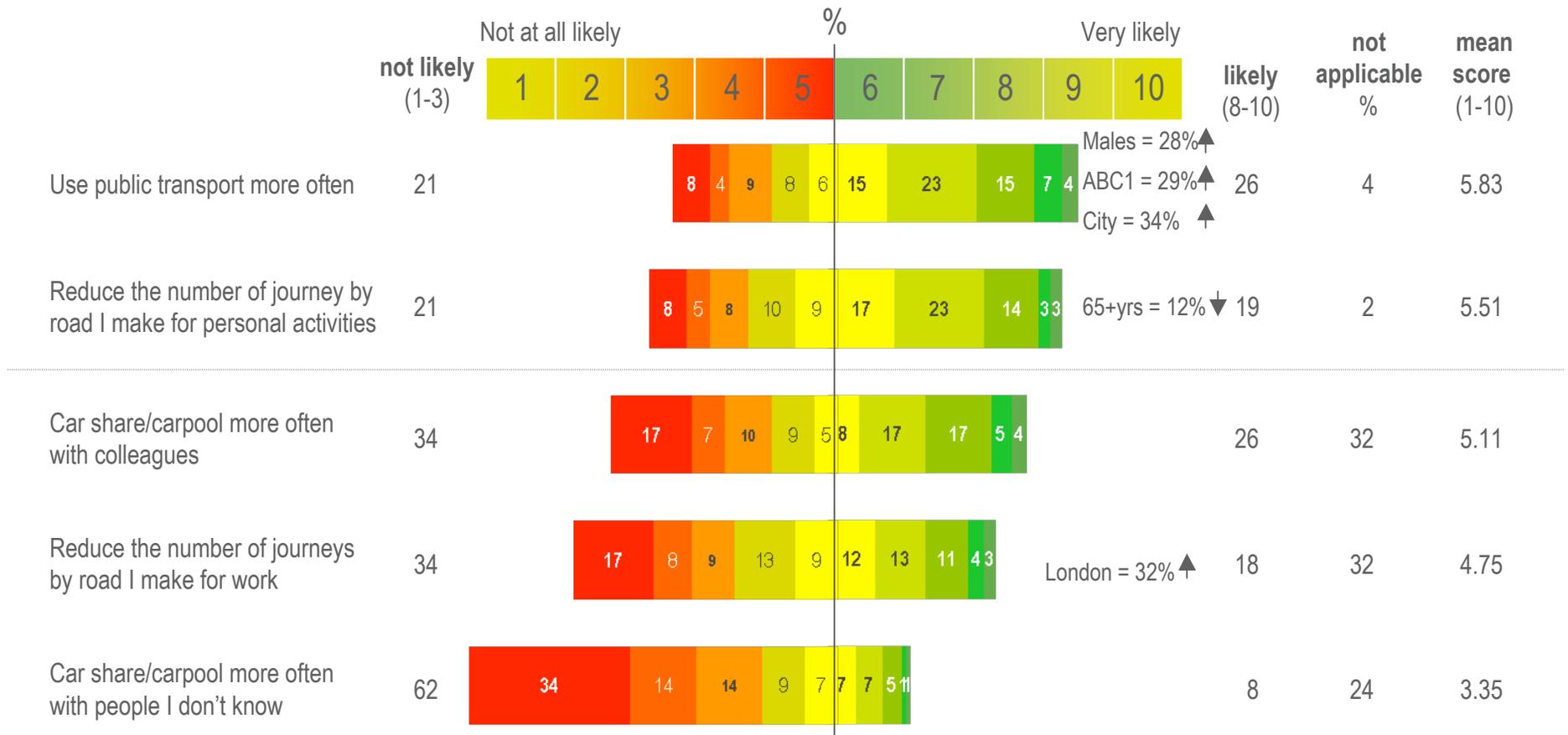
Active Traffic Management directs drivers to use the hard shoulder during times of peak congestion using electronic signs above each lane. This is also combined with variable speed limits communicated on the electronic signs. The scheme was piloted on the M42 in the West Midlands.

Base: all respondents (n=1,109)

likelihood of personally changing to reduce traffic congestion

research for decision makers™

While 26% say they are likely to use public transport more often 21% say they are not likely to take public transport to reduce traffic congestion. Even fewer would reduce their personal journeys.

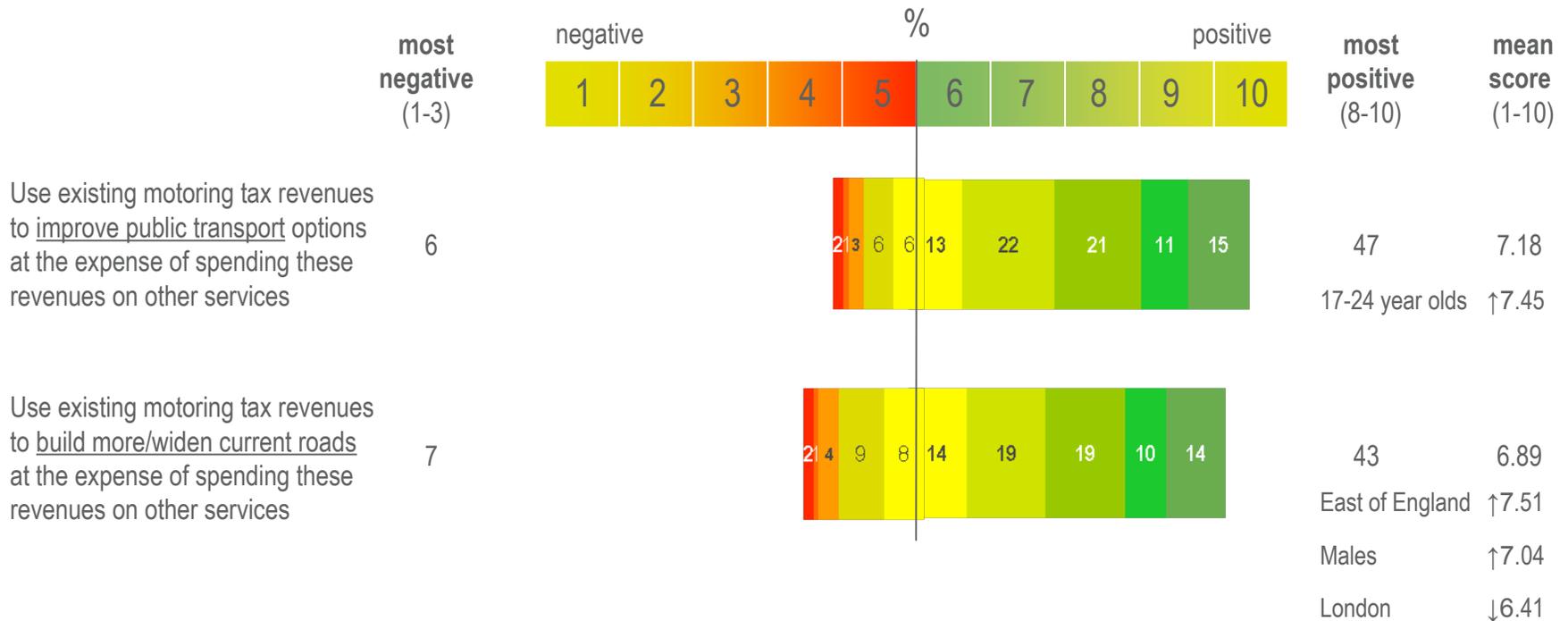


Q20 Which of the following would you be prepared to do in order to reduce traffic congestion?
Base: all respondents (n=1,109)

congestion and government actions

research for decision makers™

A majority feel that the government should use existing motoring tax to either improve public transport or build more roads at the expense of other services. Motorists favour improving public transportation slightly over building or widening roads.

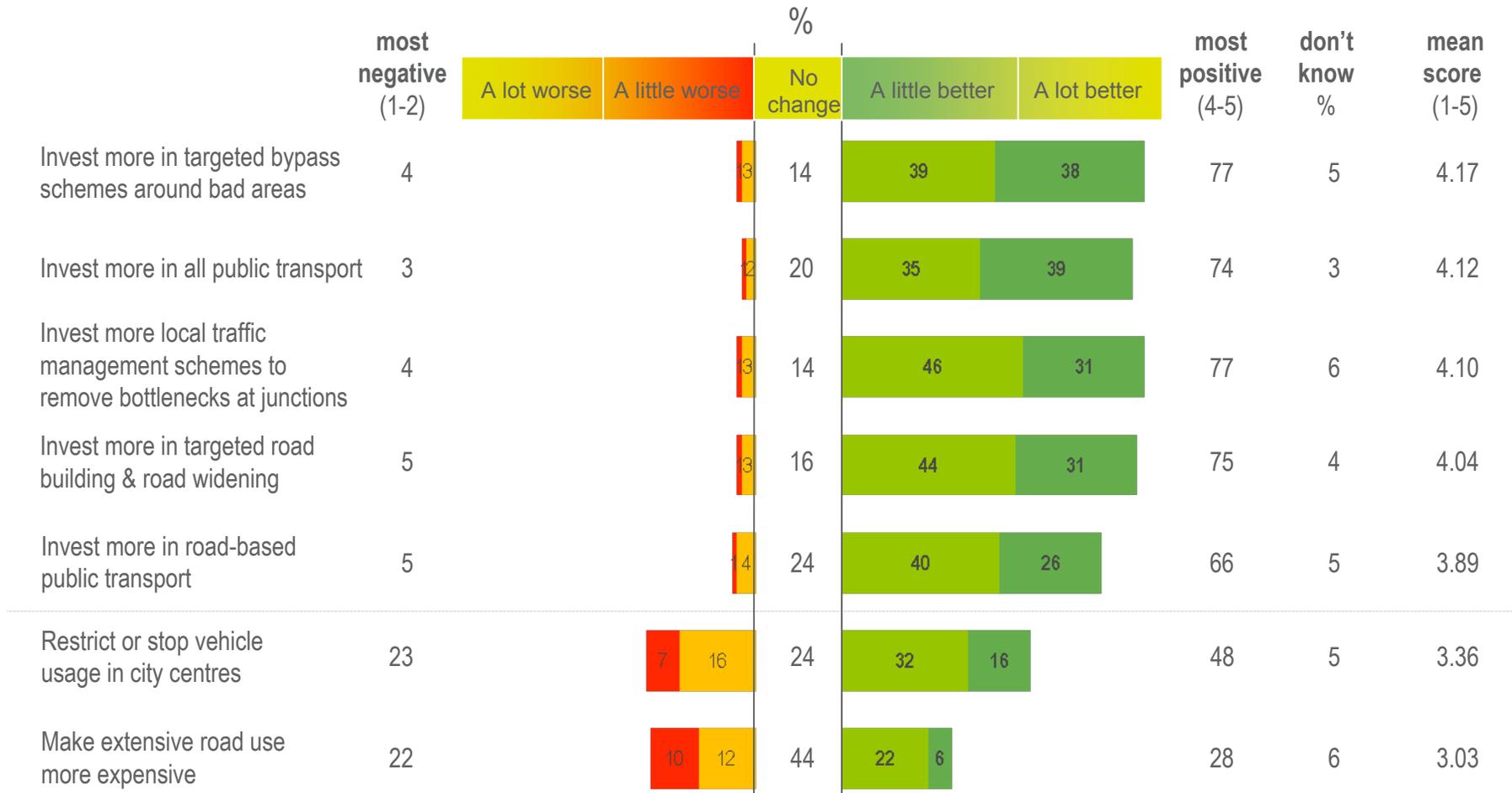


Q21 Which of the following do you think the government should do to help reduce traffic congestion? Please keep in mind that proportion of the taxes paid by motorists are current spent elsewhere.
Base: all respondents (n=1,109)

investment in reducing traffic congestion

research for decision makers™

Investing more in targeted bypass schemes, public transport and investing in traffic management are perceived to have the greatest impact on reducing traffic congestion. Restricting vehicles or making usage more expensive are not favoured as much.



Q22 What effect do you think the following options would have on reducing traffic congestion if introduced?
Base: all respondents (n=1,109)

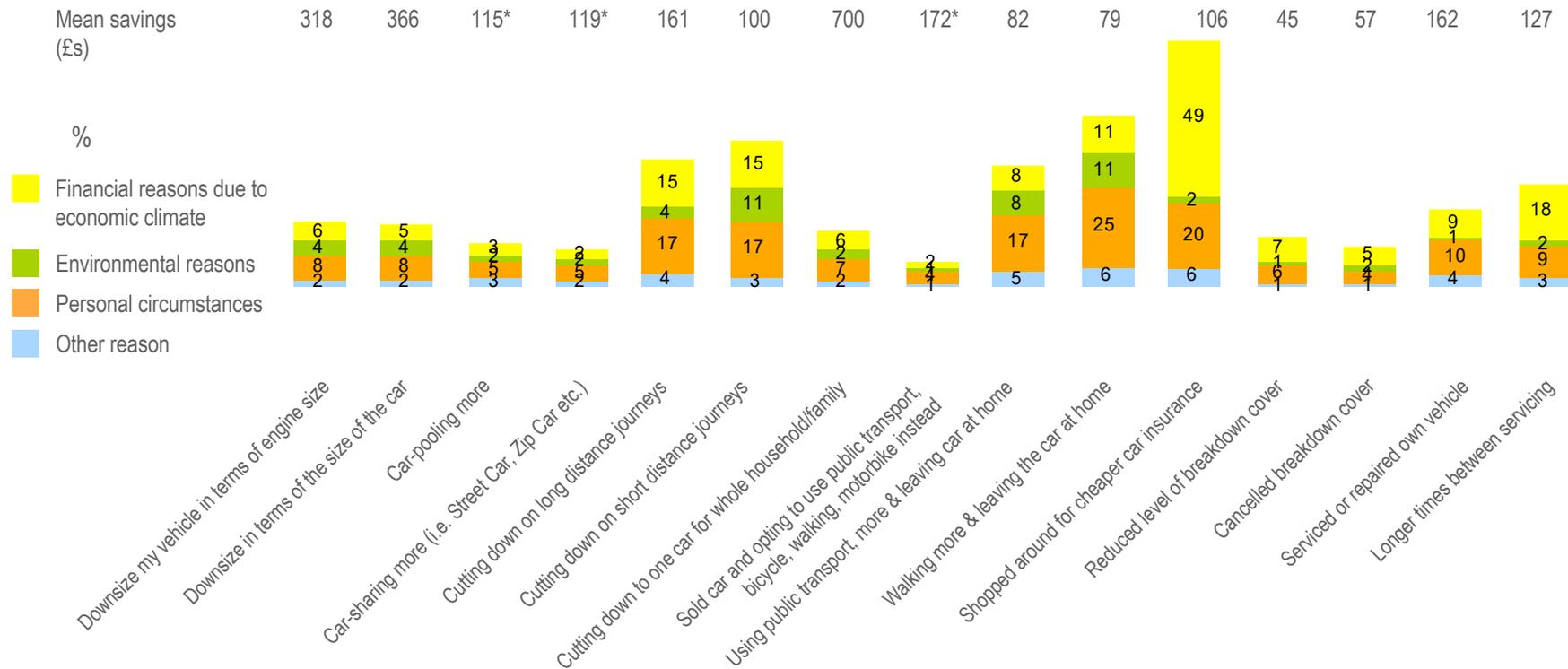


12. motoring and the credit crunch

actions taken to reduce costs

research for decision makers™

Shopping around for cheaper car insurance has been done by 71% of motorists in the past year saving approximately £106. Cutting down on long and short journeys and leaving the car at home are some of the more common actions taken. 18% plan to leave longer between vehicle servicing because of financial reasons.



Q47a Which of the following have you done (if any) in the past 18 months and why? Base: all respondents (n=1,109)

Q47b Please estimate how much you feel you have saved because of this change in the last 12 months?

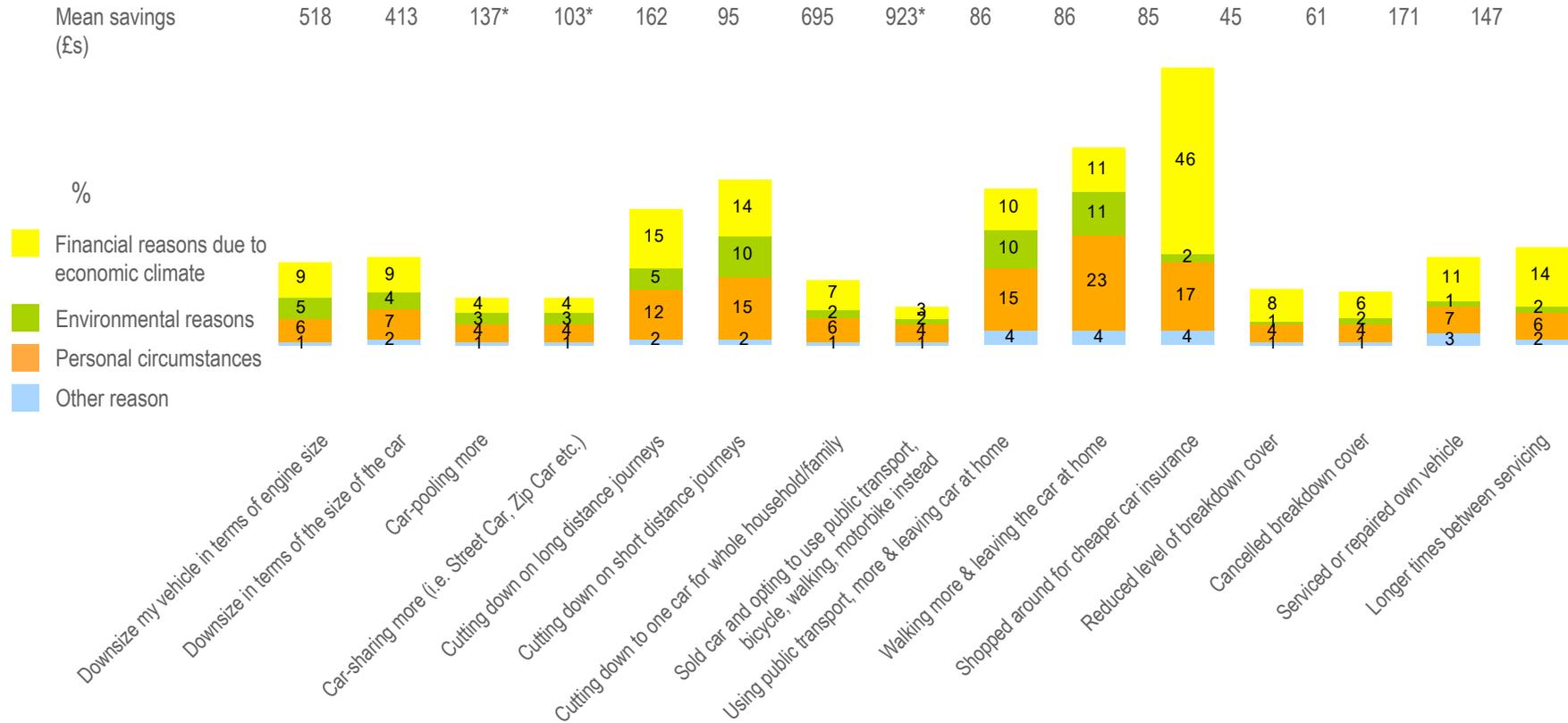
Base: respondents who selected 'financial reasons' at Q47a (n=20* to 545)

* Caution: small base size

actions intended to reduce costs

research for decision makers™

Again, shopping around for cheaper car insurance is the activity most likely (65%) to be done in the next 18 months – motorists expect to save £85. Approximately 20% intend to downsize their vehicle in terms of vehicle or engine size and save £413 to £518.



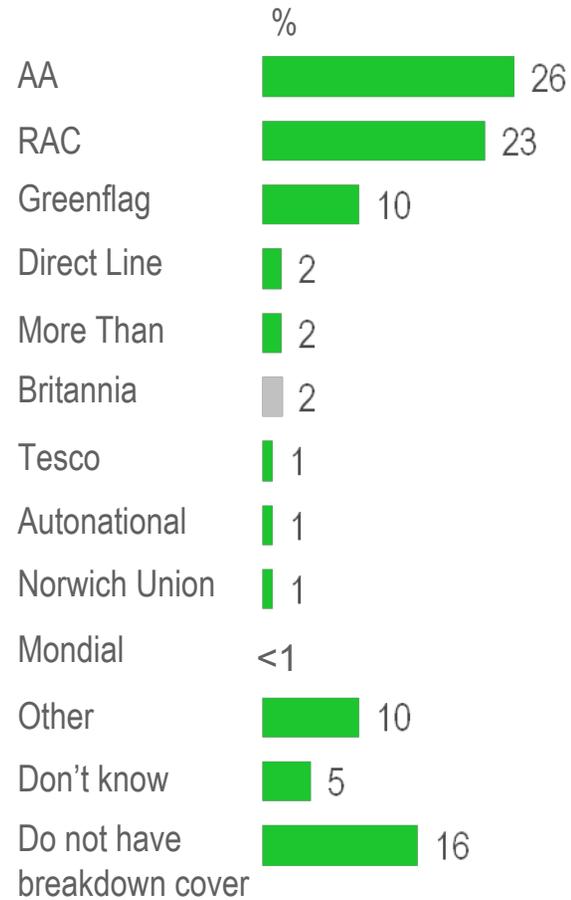
Q48a And which of the following do you intend on doing (if any) in the next 18 months and why? Base: all respondents (n=1,109)

Q48b Please estimate how much you feel you will save because of this change in the next 12 months? Base: respondents who selected 'financial reasons' at Q48a (n=34* to 514)

* Caution: small base size



13. appendix

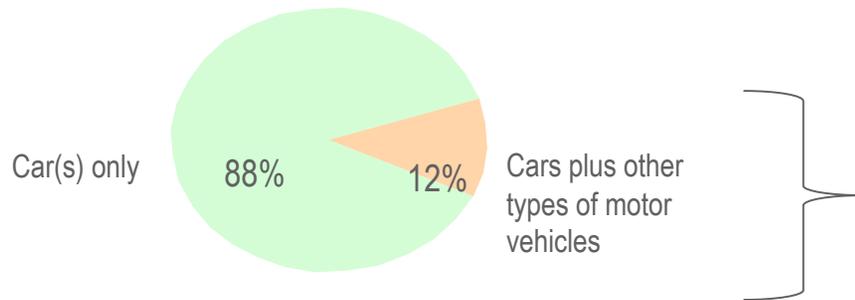


Q49 Which company, if any, is your breakdown cover with?

Base: all respondents (n=1,109)

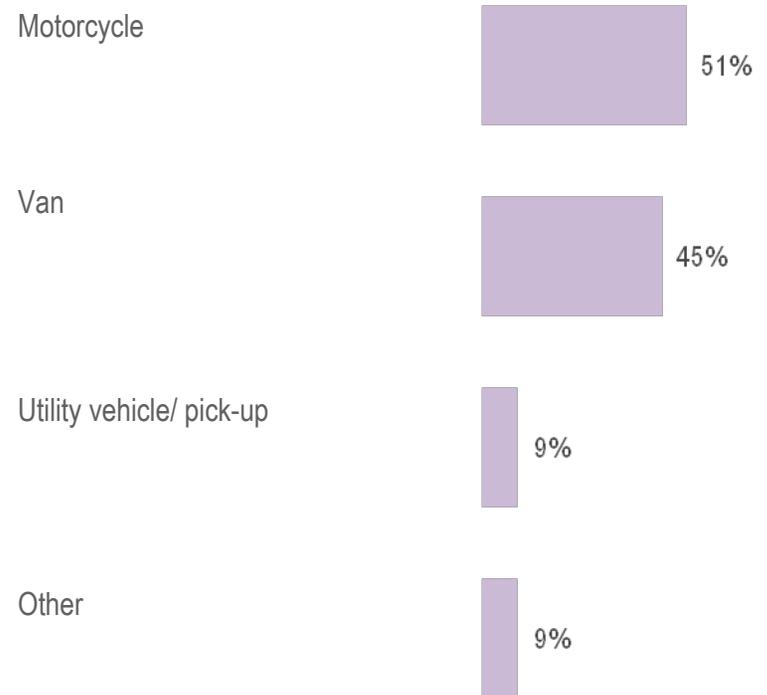
SQ6 What type of motor vehicles do you have in your household?

Base: all respondents (n=1,109)



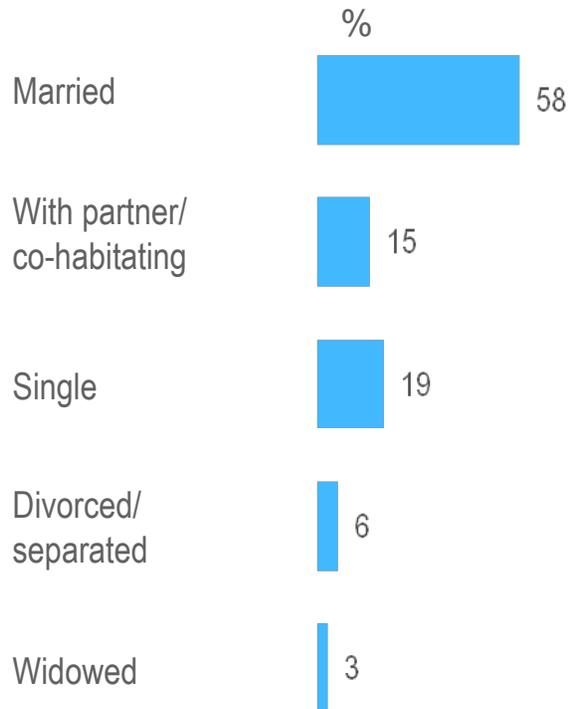
SQ7 What type of motor vehicles do you have in your household – that you use in a similar manner as you would a car?

Base: all respondents with other types of motor vehicles (n=139)



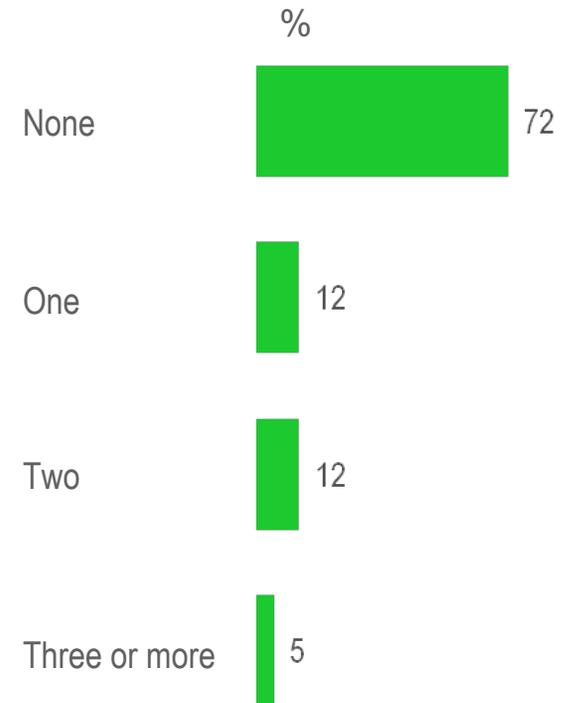
Q50 What is your marital status?

Base: all respondents (n=1,109)



Q51 How many children are there in your household aged 0-16?

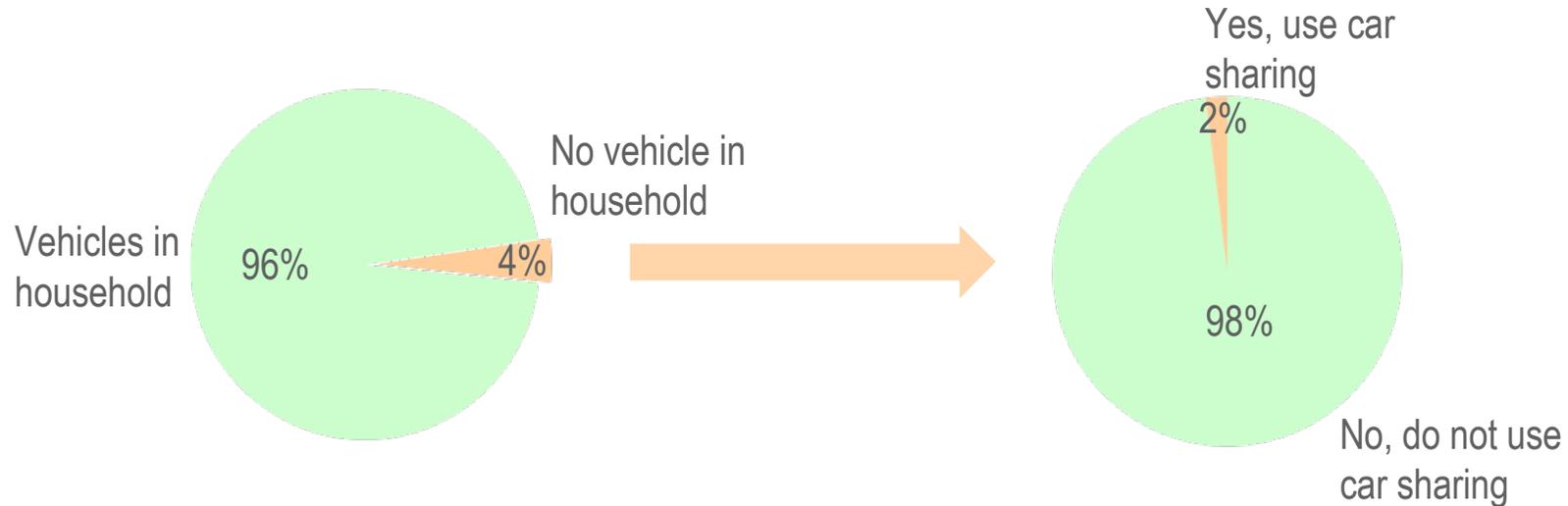
Base: all respondents (n=1,109)



car sharing amongst those with no vehicle in household

SQ6 What type of motor vehicles do you have in your household?
Base: all respondents prior to screening (n=1,380)

SQ6b Do you use a car sharing scheme such as those provided by Street Car, Zip Car, etc.?
Base: all respondents without vehicles in household (n=57)*



* Caution: small base size

	TOTAL %	CITY/ TOWN %	SUB- URBAN %	VILLAGE /RURAL %
Most people in cars could use public transport instead				
Agree	33	48	31	24
Disagree	40	27	42	48
I would find it very difficult to adjust my lifestyle to being without a car				
Agree	79	63	83	83
Disagree	11	17	9	9
I would use my car less if public transport were better				
Agree	67	73	65	67
Disagree	15	8	19	14

Village/rural living motorists feel that most people in cars are less able to use public transport and that they would find it more difficult to adjust their lifestyle to being without a car – than urban/ suburban living motorists.

Nevertheless, they similarly willing to use the car less, if public transport were better.