

RAC Report on Motoring 2016

27th June 2016

Research report prepared for the RAC Advisory Panel

© Quadrangle 2016 INTERNAL

What we'll cover.

1

Introduction

2

What's on
motorists' minds

3

Car and the
environment

4

Cars of the future

5

Motorways and
major roads: A
focus on major
incidents

6

Safety and rules

7

Drink and drug
driving

8

Hand-held mobile
phone usage on
the roads

Introduction

1

About the survey.

The purpose of the survey is to ask UK motorists about a range of topics relevant to motoring today.

- A 30 minute online survey conducted in mid-May 2016 with 1,714 motorists in the United Kingdom.
- Sample of interviewed motorists was nationally representative in terms of age, gender, socio-economic group, UK regions (including regional boosts to ensure robust bases) and car ownership (private vs. company car)



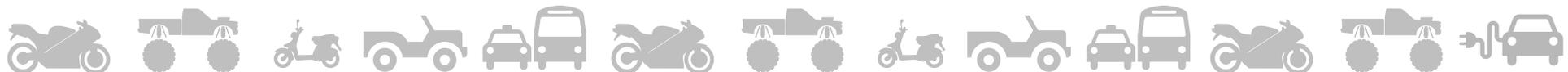
Significantly higher
than last year



Significantly lower than
last year

Note on the analysis

- Significant differences (at 95% level) between key groups are highlighted throughout the report
- Figures may not add up to exactly 100% due to rounding or where more than a single response was permitted



What's on motorists' minds

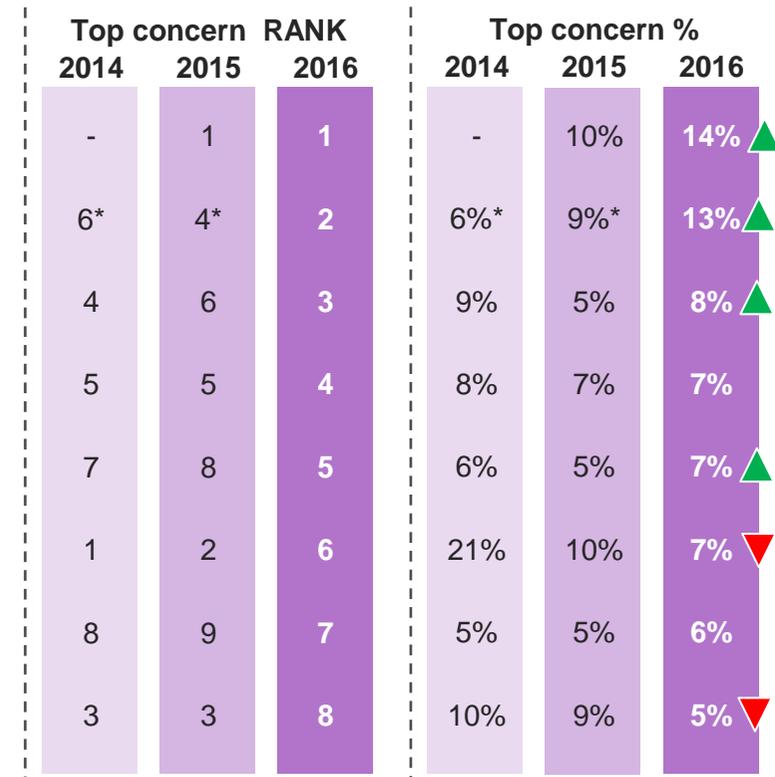
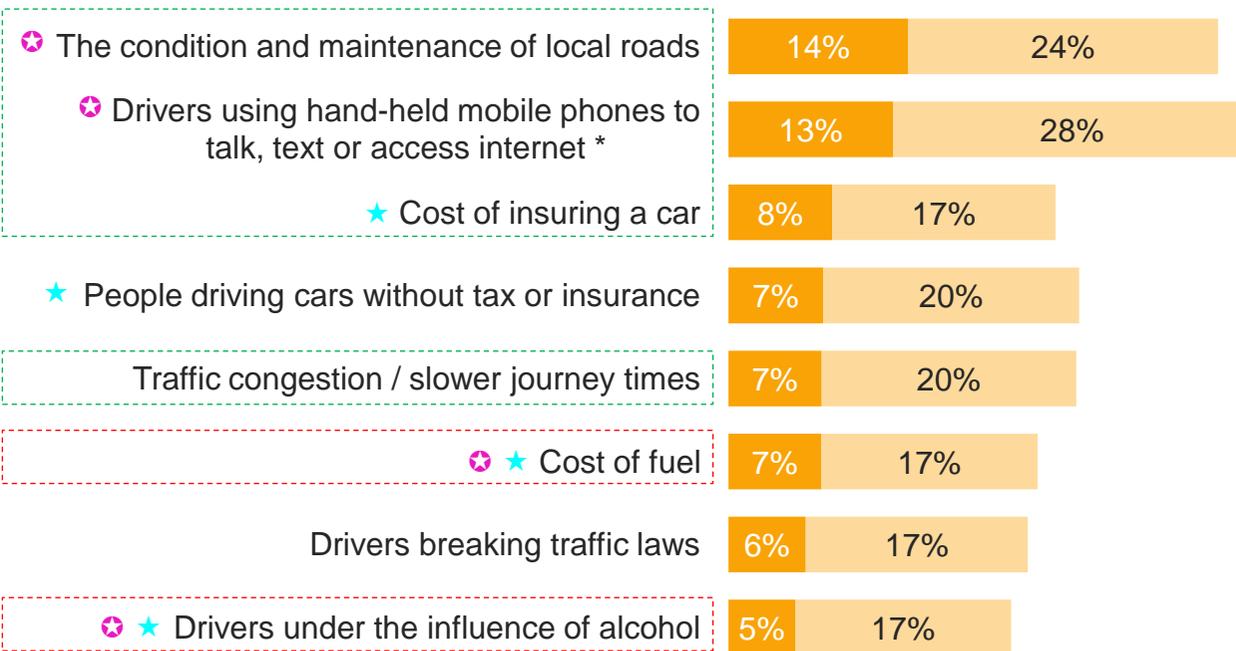
2

- Motorists' concerns
- Condition of roads
- Views on the cost of running a car
- Motoring taxation
- Investment priorities
- Changes in vehicle usage

Motorists' top concerns

Condition of local roads and drivers using hand-held phones while driving are increasingly of concern to motorists. Cost of fuel and drivers under influence of alcohol are less of a concern to motorists than in previous years.

■ Issues of most concern (ranked 1) ■ Other issues of concern (ranked 2-4)



☆ 2015 issues of most total concern (Top 4)

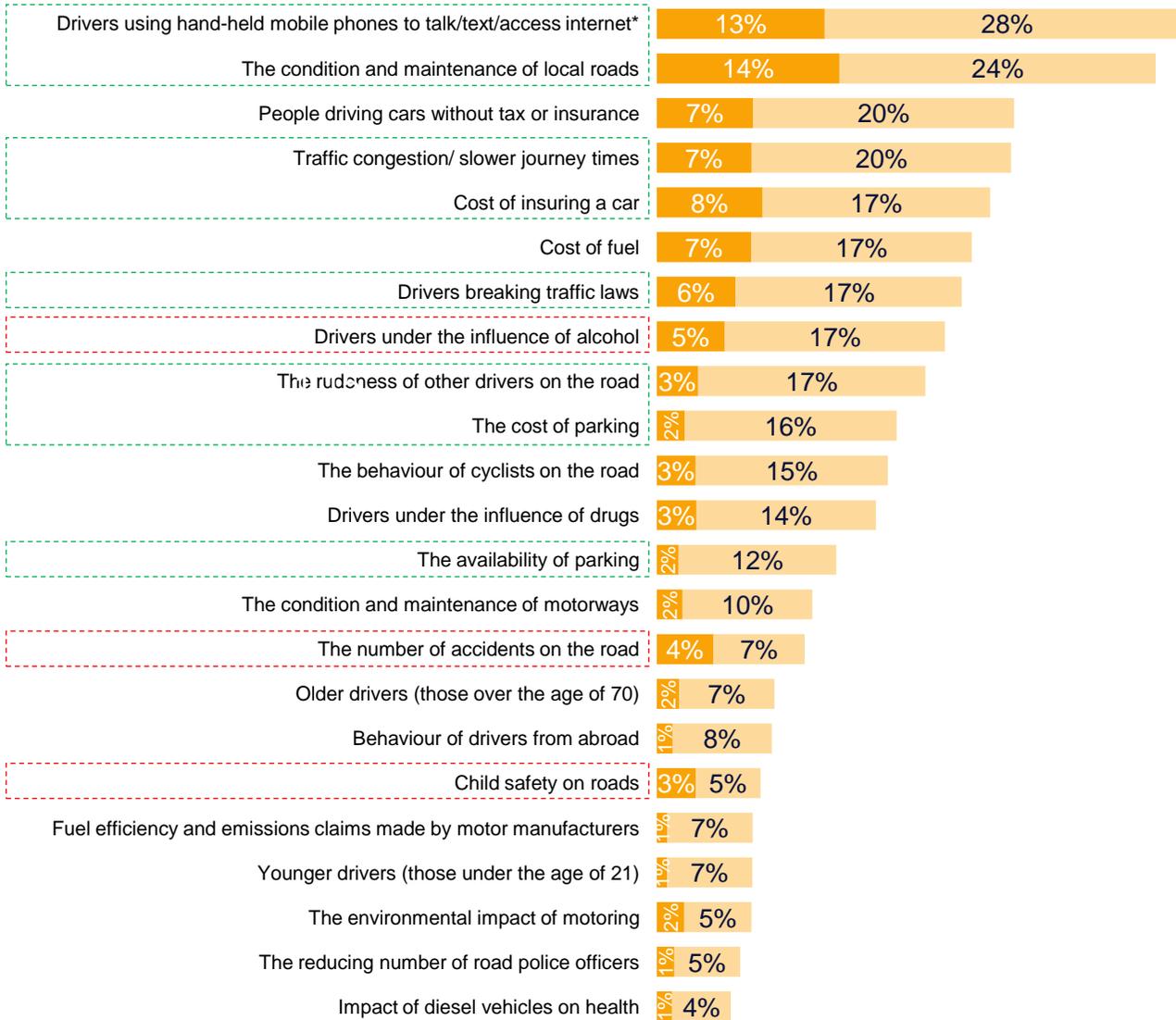
★ 2014 issues of most total concern (Top 4)

* In 2014 and 2015, this was asked as two separate statements. To allow for comparison, an average was taken across the two statements as the levels of concern across the two were comparable.

Motorists' concerns

■ Issues of most concern (ranked 1)

■ Other issues of concern (ranked 2-4)



Total concern RANK

2014 2015 2016

4*	1*	1
-	2	2
3	4	3
8	9	4
6	8	5
1	5	6
7	7	7
5	3	8
10	11	9
-	14	10
12	10	11
9	6	12
-	18	13
-	13	14
11	12	15
16	17	16
-	-	17
13	16	18
-	-	19
17	19	20
15	20	21
-	-	22
-	-	23

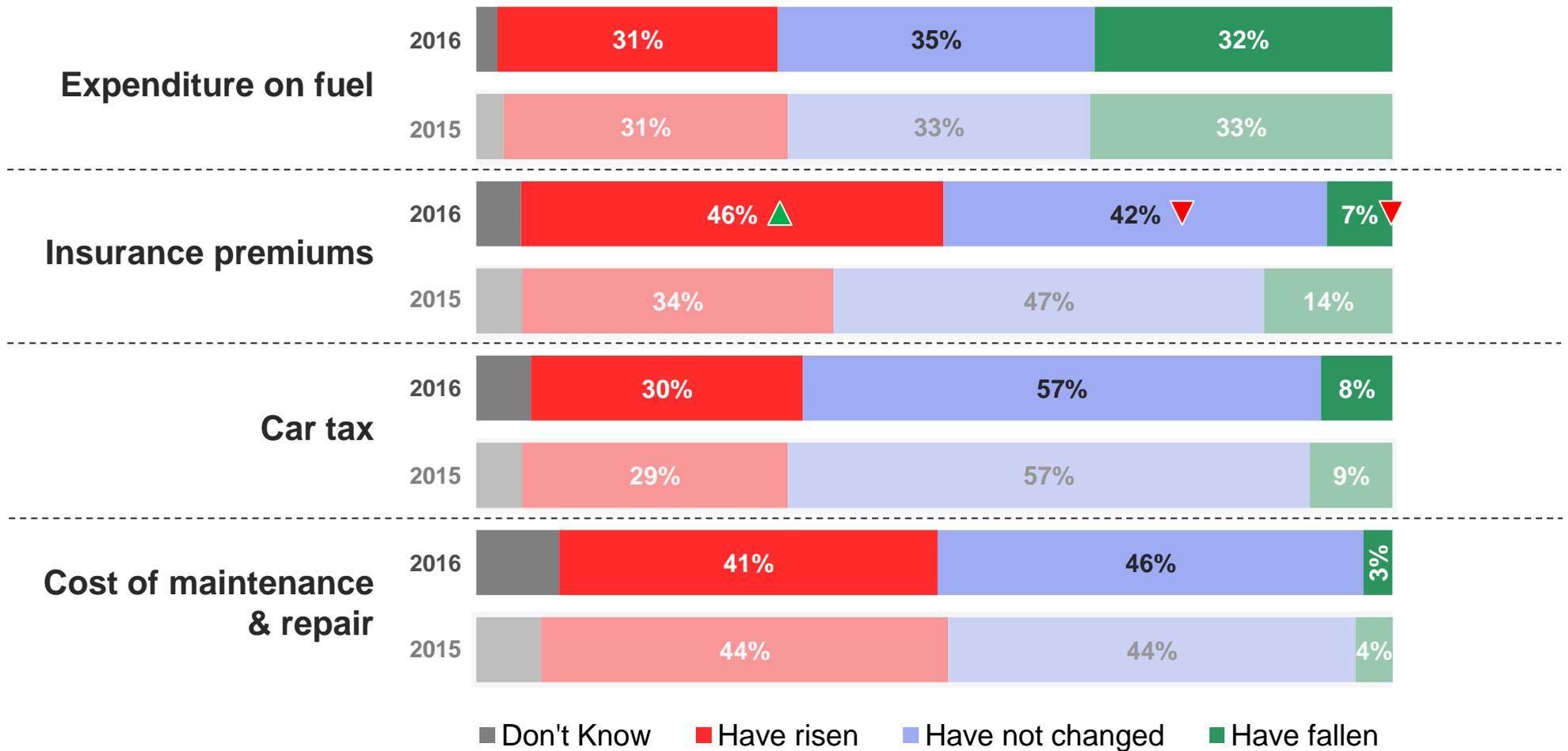
Total concern %

2014 2015 2016

33%*	34%*	41%▲
-	30%	38%▲
35%	26%	27%
21%	18%	27%▲
28%	18%	26%▲
47%	26%	24%
22%	19%	23%▲
32%	29%	22%▼
15%	15%	21%▲
-	12%	18%▲
13%	16%	18%
18%	19%	17%
-	8%	14%▲
-	13%	12%
13%	14%	11%▼
6%	10%	9%
-	-	9%
9%	11%	8%▼
-	-	7%
6%	8%	7%
7%	7%	7%
-	-	6%
-	-	6%

Running cost charges

Motorists have felt a sharp rise in insurance premiums over the last 12 months.

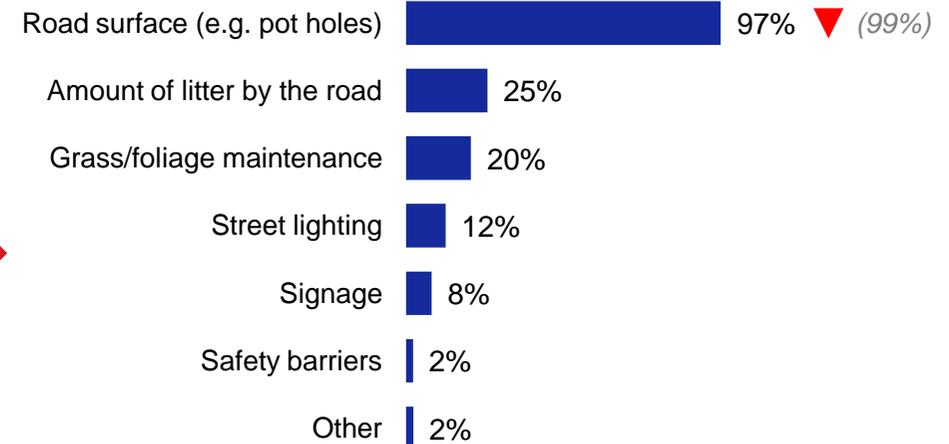
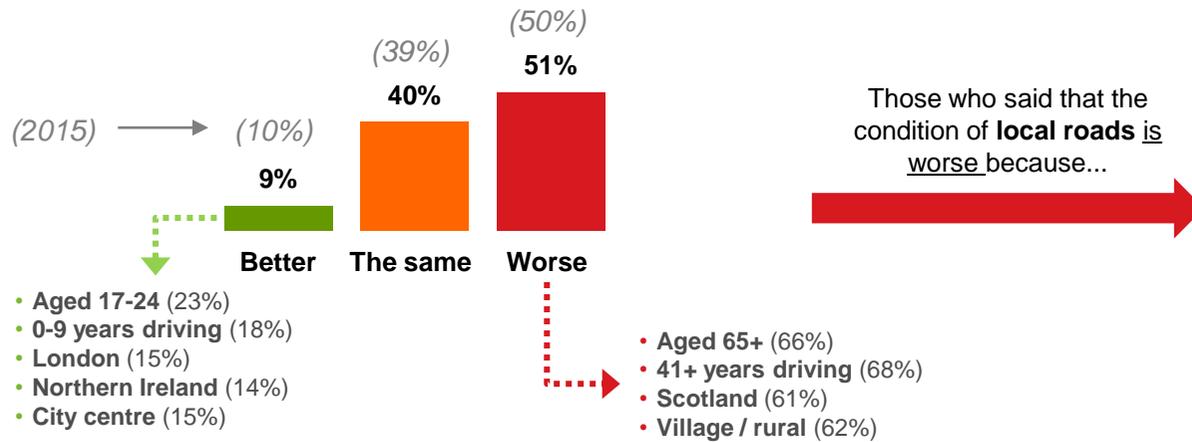


QG1. Over the past 12 months, how, if at all, have your motoring costs changed? Bases: All respondents – 2016 (1714), 2015 (1555).

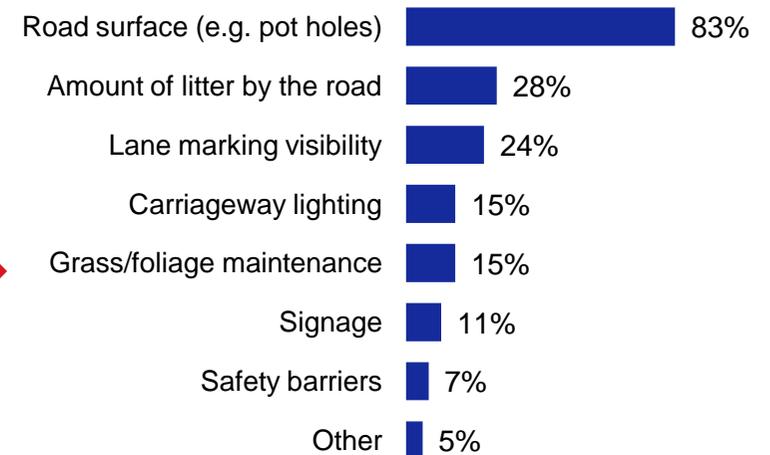
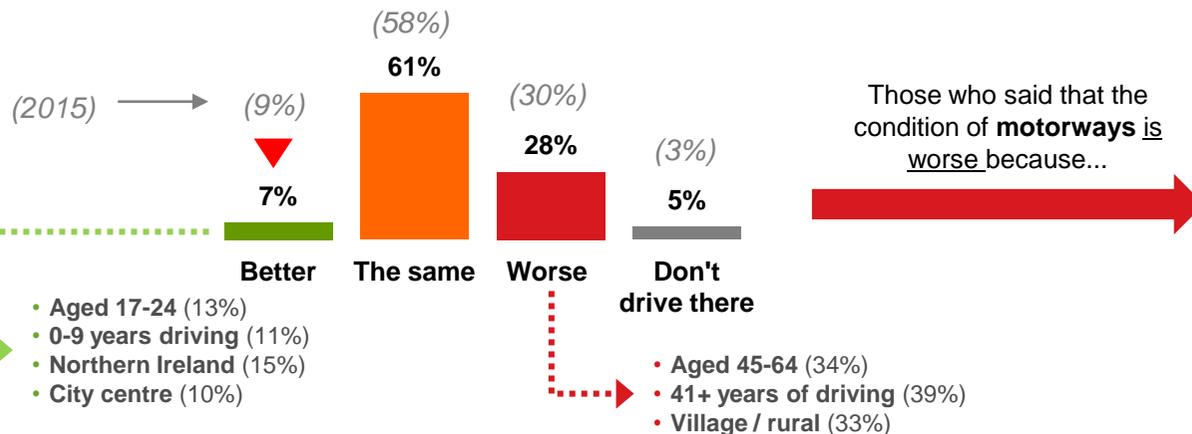
Condition of local roads and motorways

Motorists feel that local roads continue to be neglected.

Condition of local roads compared to a year ago...

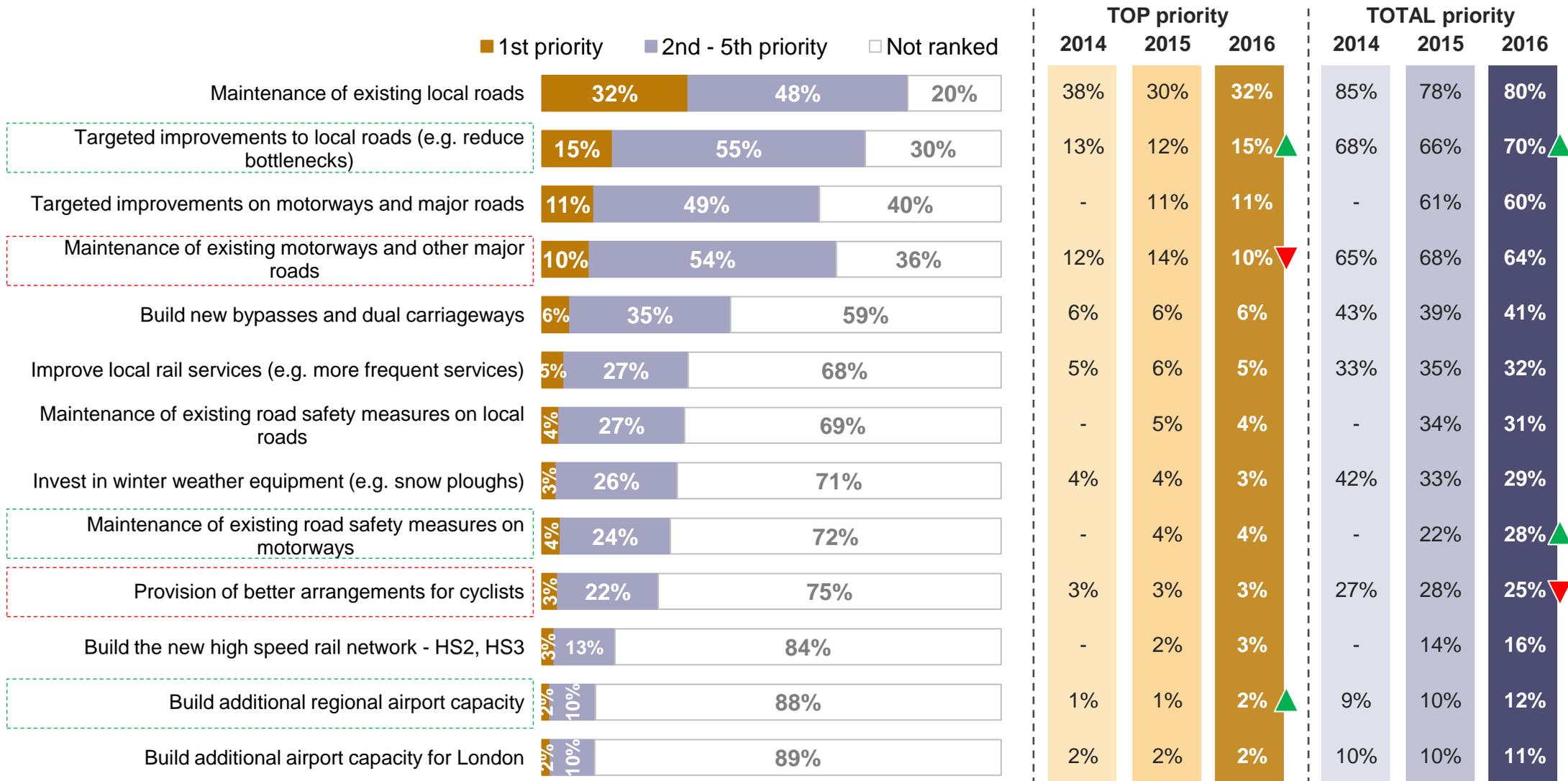


Condition of motorways / dual carriageways compared to a year ago...



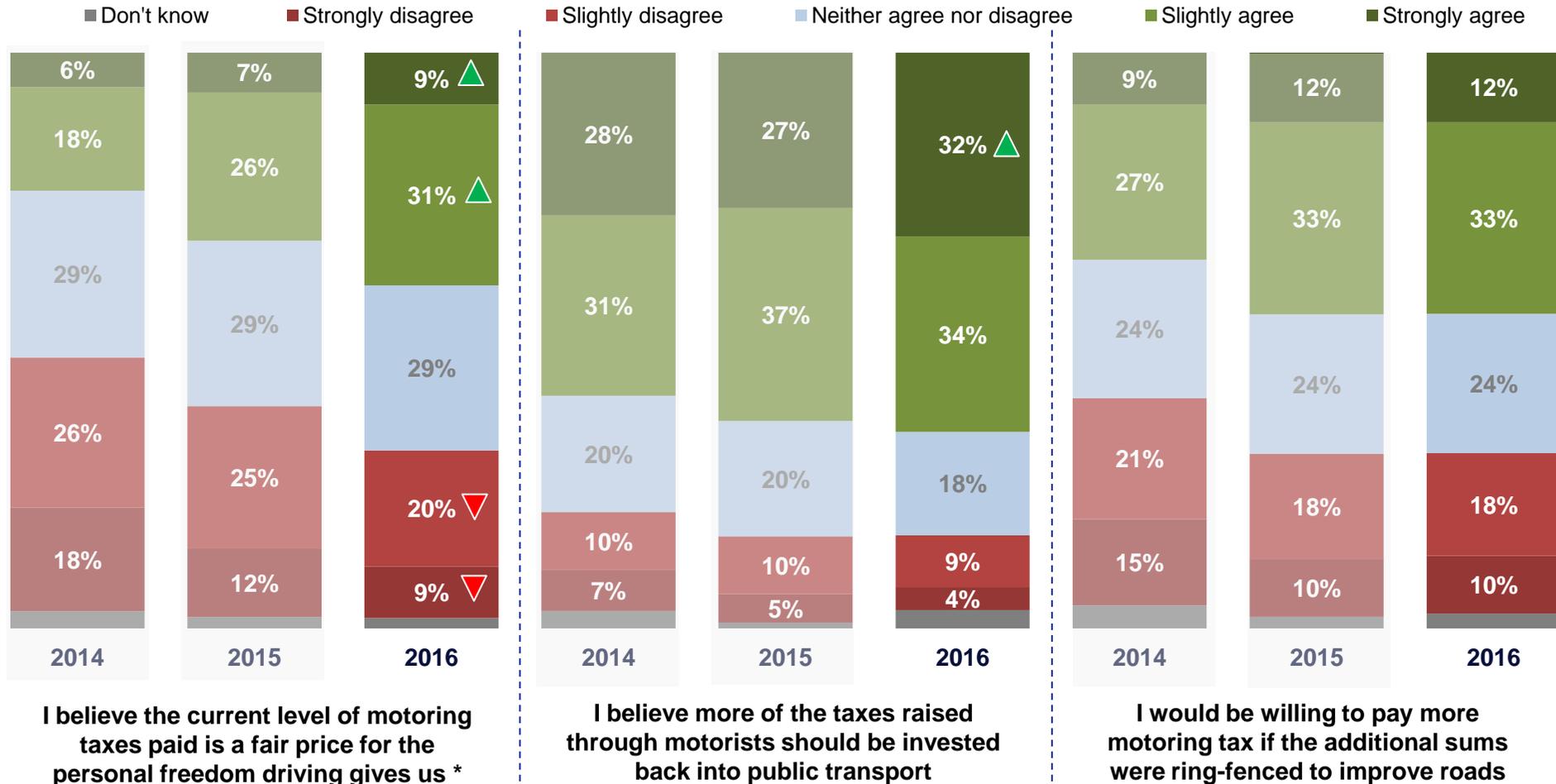
Priorities for transport investment

More effective maintenance of local roads is seen as a priority area for transport investment.

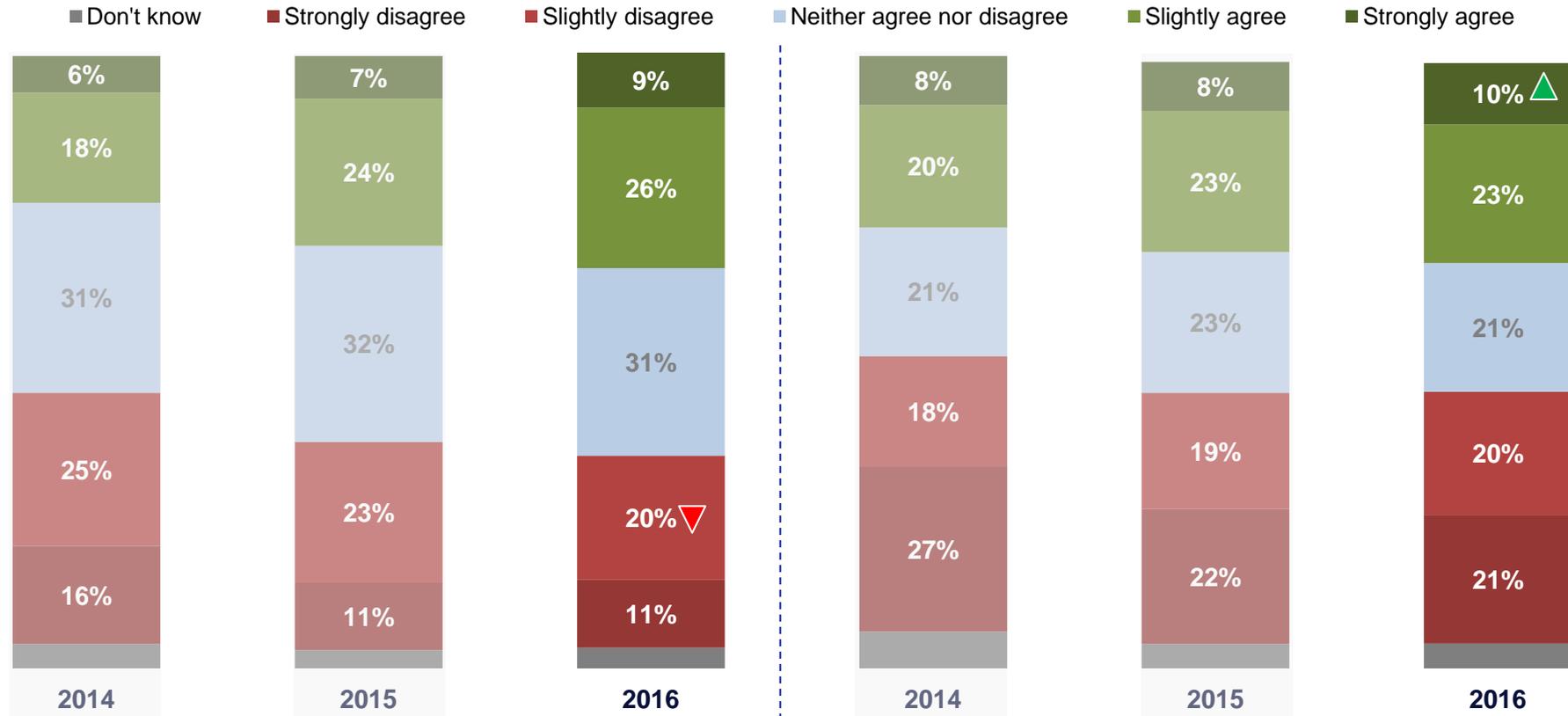


QG3. In the current economic climate, the national and local government have limited funding available for transport investment. Based on the list below, please rank your top 5 in order of priority where you believe transport funding should be prioritised, with 1 being the first priority. Bases: All respondents – 2016 (1714), 2015 (1555), 2014 (QC7-1526).

Motoring taxes (1)



Motoring taxes (2)



I believe the current level of motoring taxes paid is a fair price for the environmental damage motoring can cause

I would be willing to pay per mile on all roads on which I drive if it replaced some existing motoring taxes

Motoring issues

■ Don't know
 ■ Strongly disagree
 ■ Slightly disagree
 ■ Neither agree nor disagree
 ■ Slightly agree
 ■ Strongly agree

Much tougher steps should be taken to reduce traffic congestion



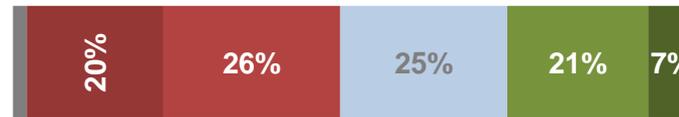
Local journey times are becoming less predictable



Motorway and high speed dual carriageway journey times are becoming less predictable



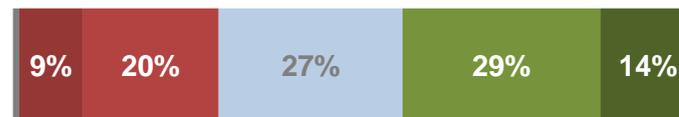
I don't think I am very likely to get caught if I break most motoring laws



There are not enough police on the roads enforcing driving laws



Motoring may become a rare luxury if the cost of driving continues to escalate



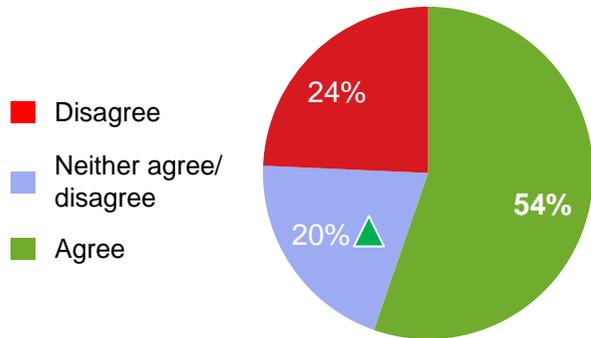
Total Disagreement

Total Agreement

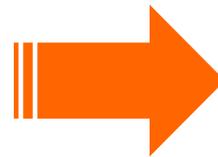


QL2. Thinking broadly about a wide range of motoring issues, how strongly do you agree or disagree with the following statements? QL7. And thinking about a few more motoring issues, how strongly do you agree or disagree with the following statements? Bases: All respondents – 2016 (1714), 2015 (1555), 2014 (1526).

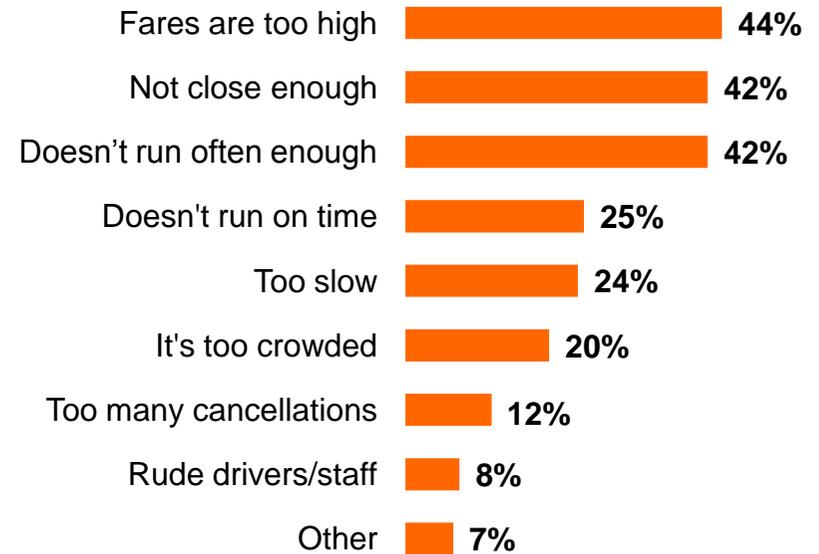
Reasons for not using public transport



54% agree that they **would drive less if public transport was better**



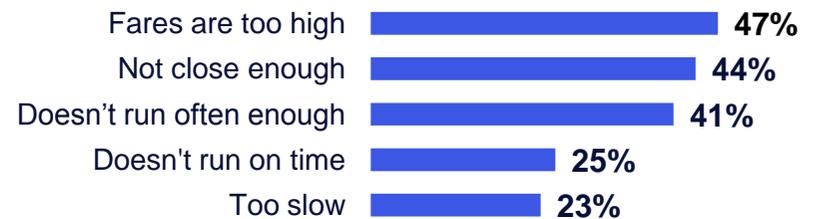
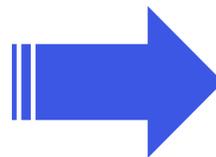
But don't use it more because...



2015

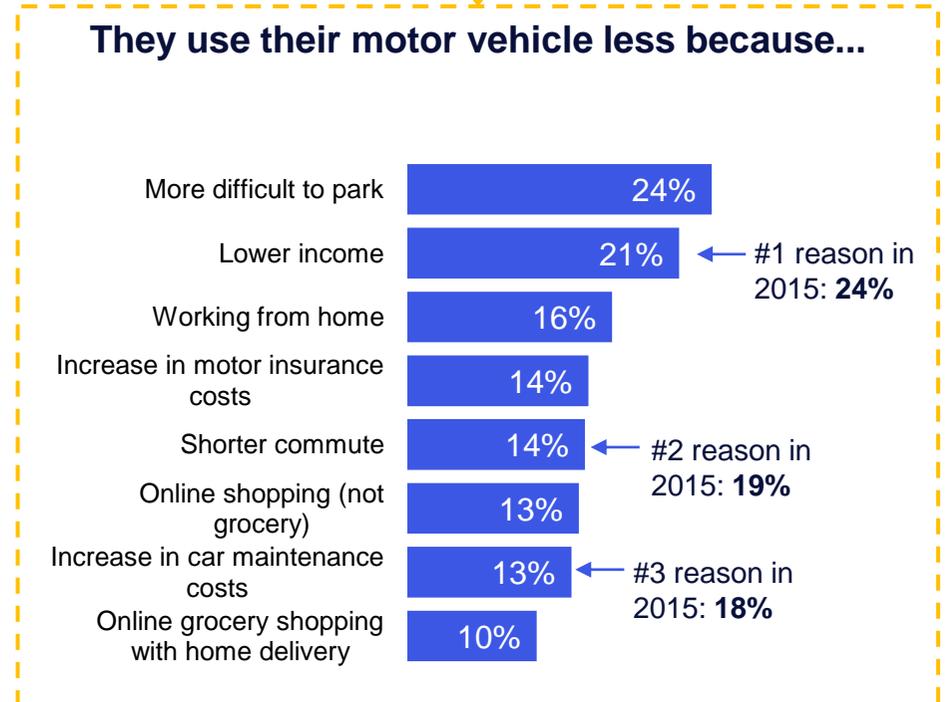
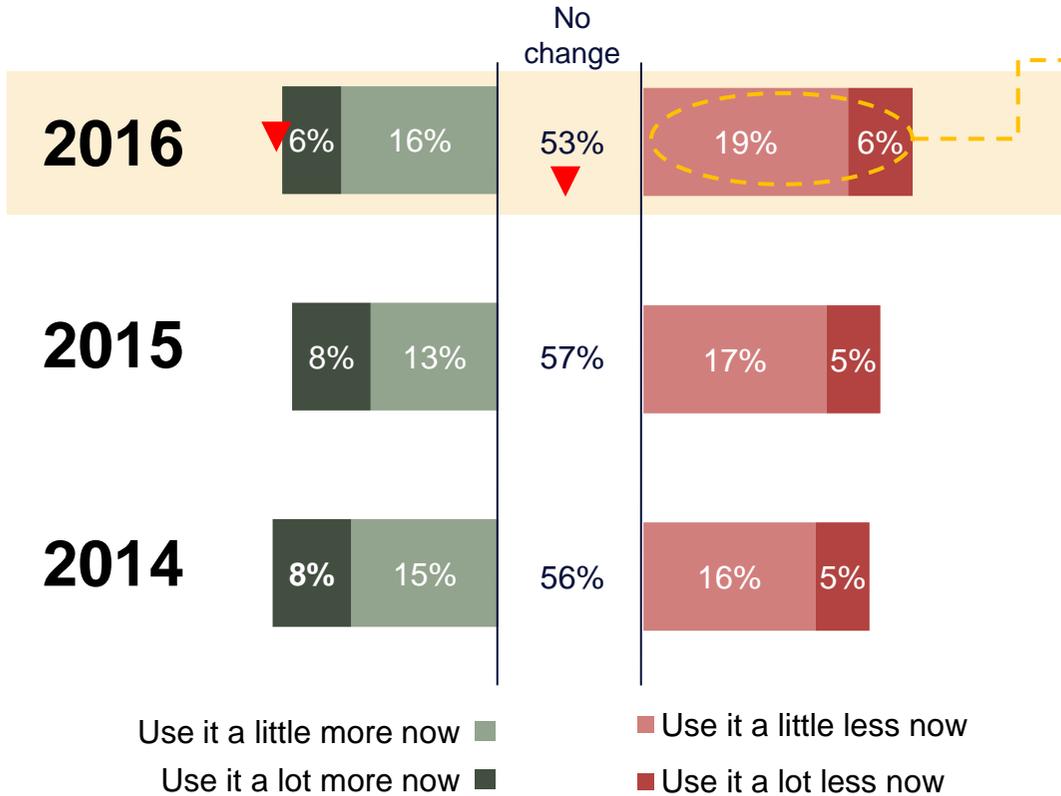
56% agreed that they **would drive less if public transport was better**

(25% disagreed and 17% neither agreed nor disagreed)



Motor vehicle usage

Car usage compared to a year ago...



Statements above 10% shown

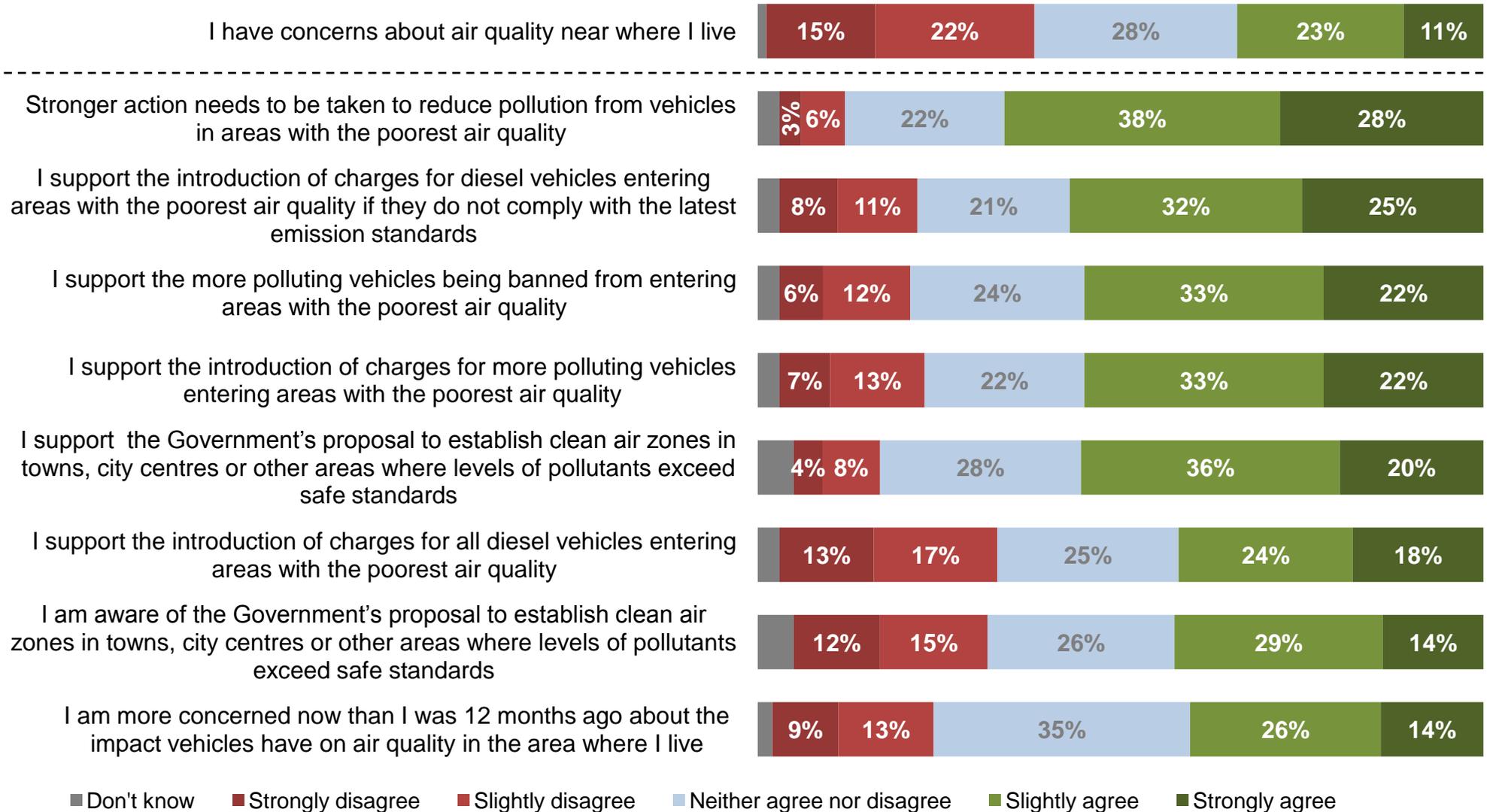
14% feel that they are less dependant on their vehicle compared to 12 months ago. This is a significant increase since 2015 (9%)

Car and the environment

3

- The local environment
- Choice of next car
- Cars of the future

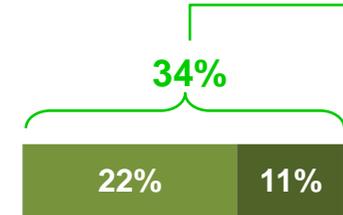
The local environment (1)



QR1. To what extent do you agree or disagree with the following statements? Bases: All respondents (1714).

The local environment (2)

I have concerns about air quality near where I live



Stronger action needs to be taken to reduce pollution from vehicles in areas with the poorest air quality



I support the introduction of charges for diesel vehicles entering areas with the poorest air quality if they do not comply with the latest emission standards



I support the introduction of charges for more polluting vehicles entering areas with the poorest air quality



I support the more polluting vehicles being banned from entering areas with the poorest air quality



I support the introduction of charges for all diesel vehicles entering areas with the poorest air quality



I support the Government's proposal to establish clean air zones in towns, city centres or other areas where levels of pollutants exceed safe standards



I am more concerned now than I was 12 months ago about the impact vehicles have on air quality in the area where I live



I am aware of the Government's proposal to establish clean air zones in towns, city centres or other areas where levels of pollutants exceed safe standards



■ Don't know ■ Strongly disagree ■ Slightly disagree ■ Neither agree nor disagree ■ Slightly agree ■ Strongly agree

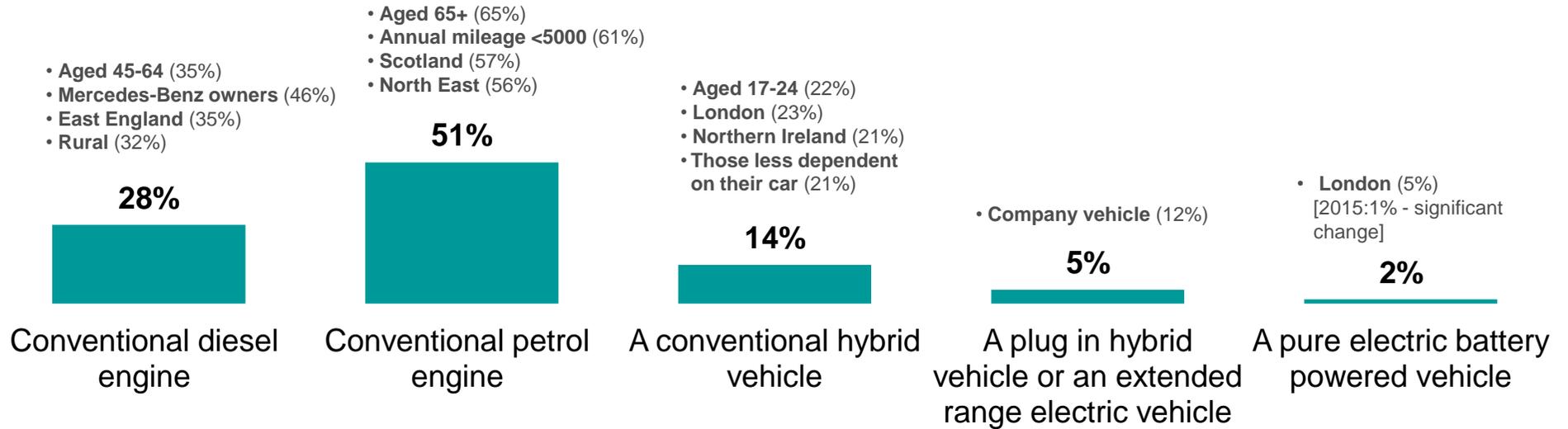
Cars of the future

4

- Choice of next car
- New car technology
- Driverless cars

Choice of next car

Motorists continue to foresee buying traditionally fuelled cars.



2015

28%

53%

14%

4%

1%



59%
would prefer a new car

- Company vehicle (86%)
- Annual mileage over 10,000 (73%)
- Aged 45-64 years (64%)
- Male (63%)
- ABC1 (64%)



41%
would prefer a used car

- Aged 17-24 (52%)
- Female (45%)
- C2DE (47%)

Cars of the future (1)

■ Don't know
■ Strongly disagree
■ Slightly disagree
■ Neither agree nor disagree
■ Slightly agree
■ Strongly agree

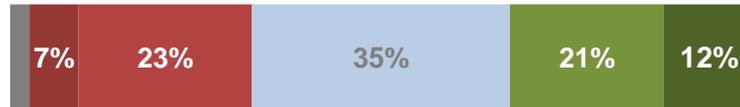
I am opposed to any new technology that has the potential to distract drivers



Many of the new technologies will lead to complacency amongst drivers and lead to more accidents



I am opposed to any new technology that records how well I am driving



I am opposed to systems and technology that record data and/or images in the period immediately before and during an incident



Driverless cars will improve personal mobility for older and disabled people *



Driverless cars will make our roads safer *



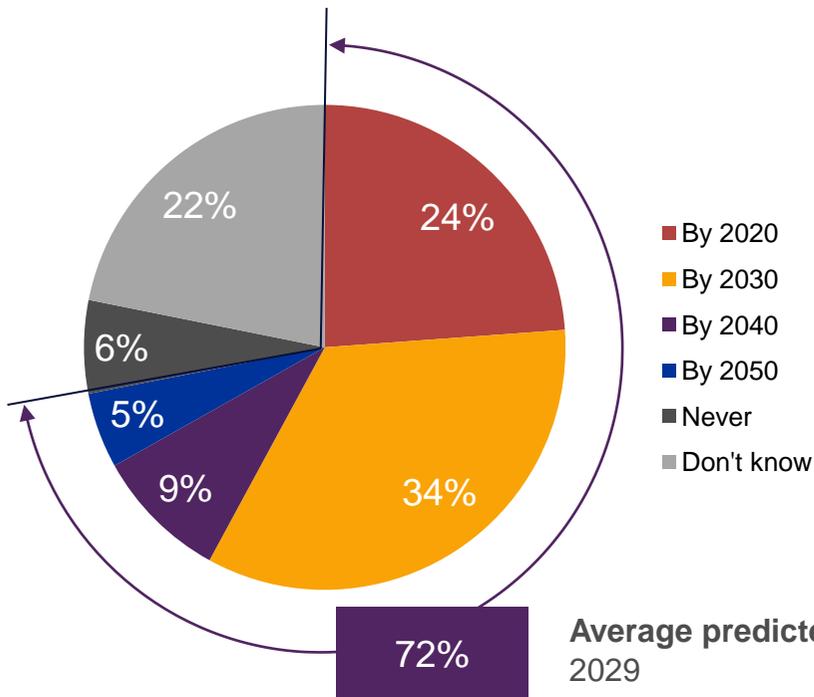
* Statement wording amended from 2015

QN3/4 To what extent do you agree or disagree with the following statements? Bases: All respondents – 2016 (1714), 2015 (1555).

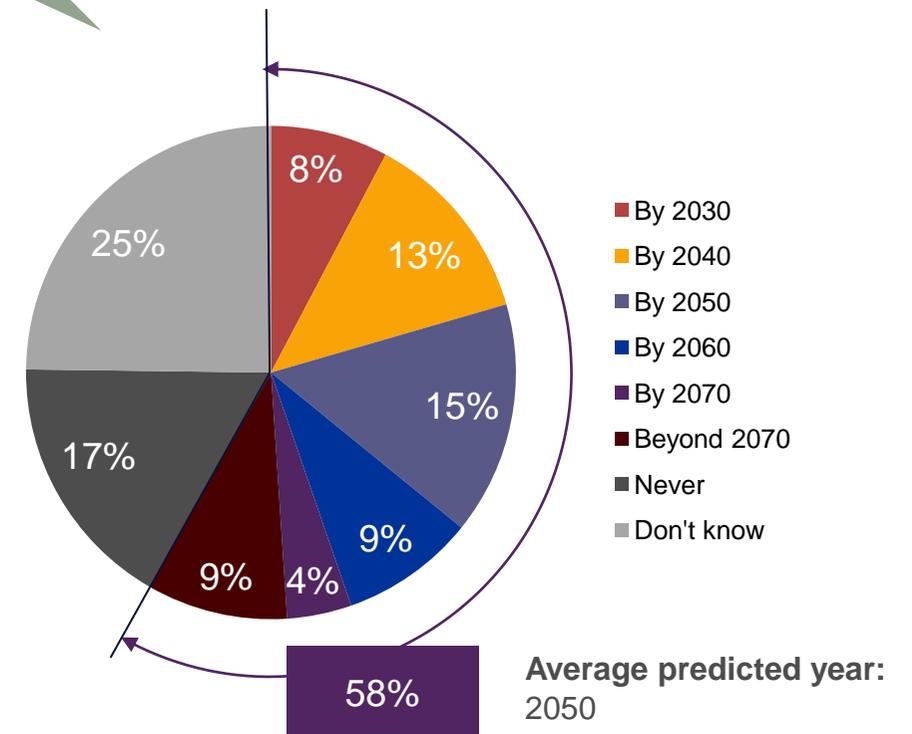
Cars of the future (2) – focus on driverless cars

There is some confidence that driverless cars will become available for purchase in the next 5 to 15 years, however, motorists are less certain about their future beyond availability.

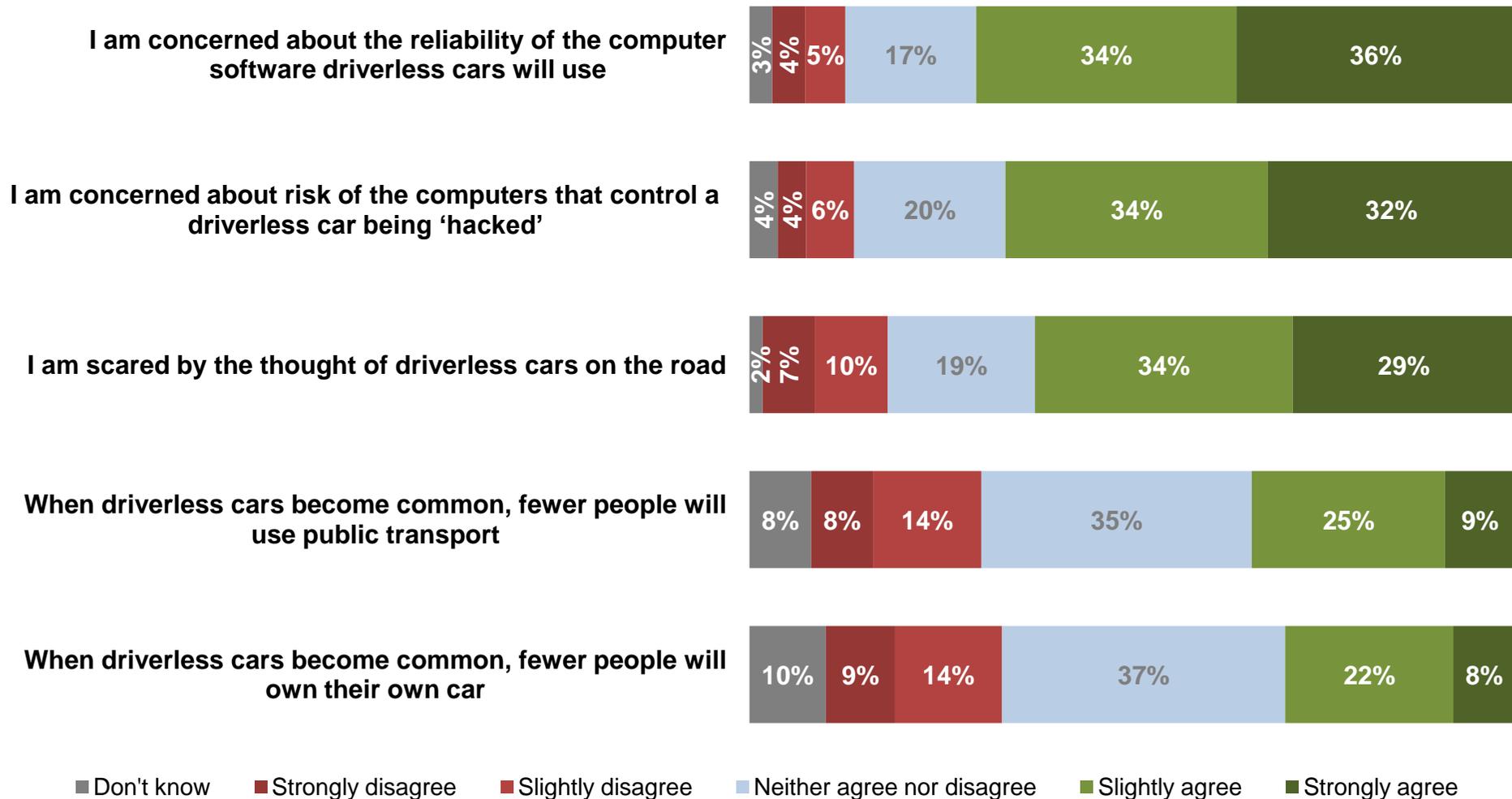
 **When driverless cars will first be available**



 **When driverless cars will outnumber conventional vehicles**

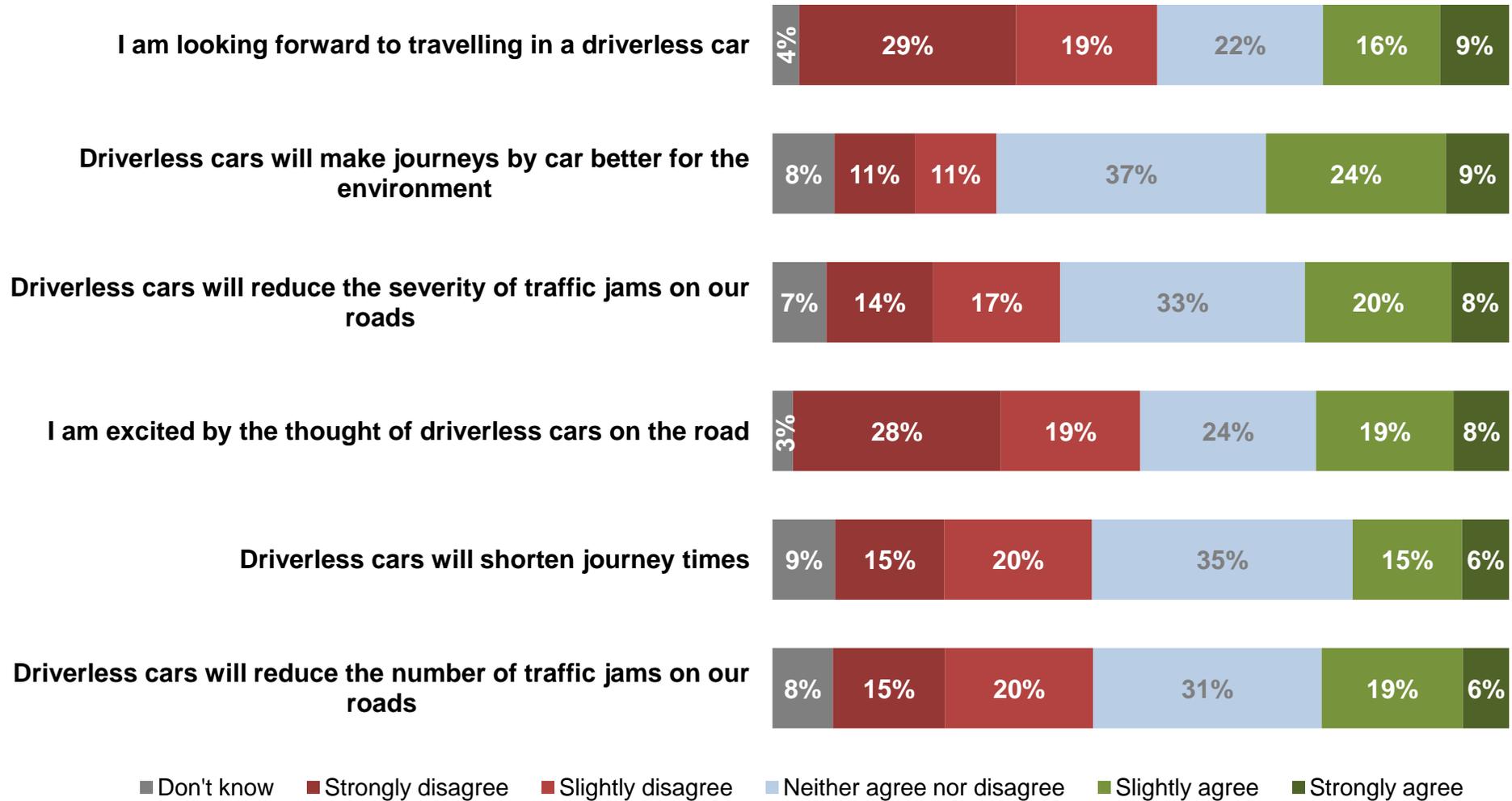


Cars of the future (3) – focus on driverless cars



QN3/4 To what extent do you agree or disagree with the following statements? Bases: All respondents (1714).

Cars of the future (4) – focus on driverless cars



QN3/4 To what extent do you agree or disagree with the following statements? Bases: All respondents (1714).

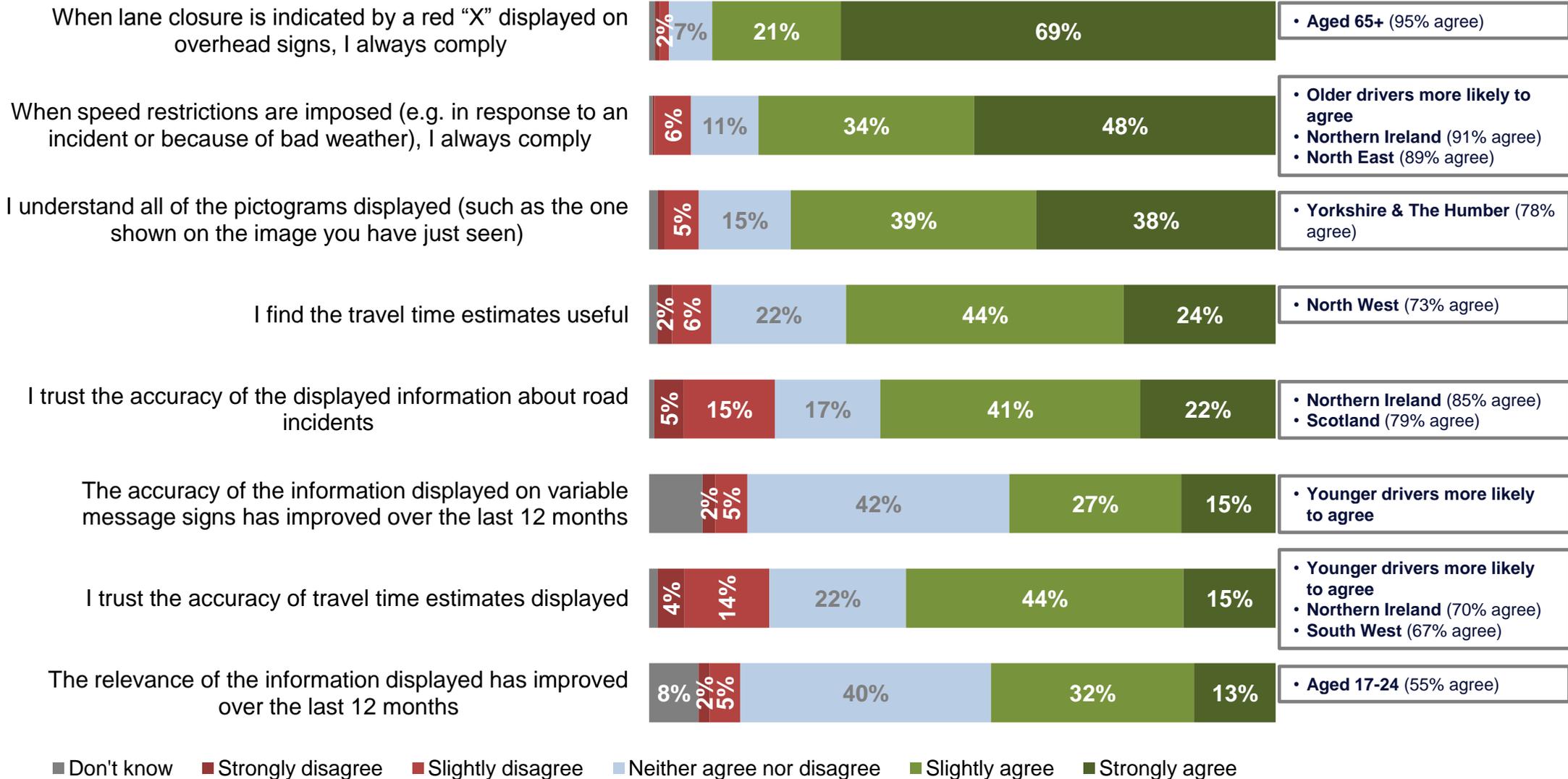
Motorways and major roads

A focus on major incidents

5

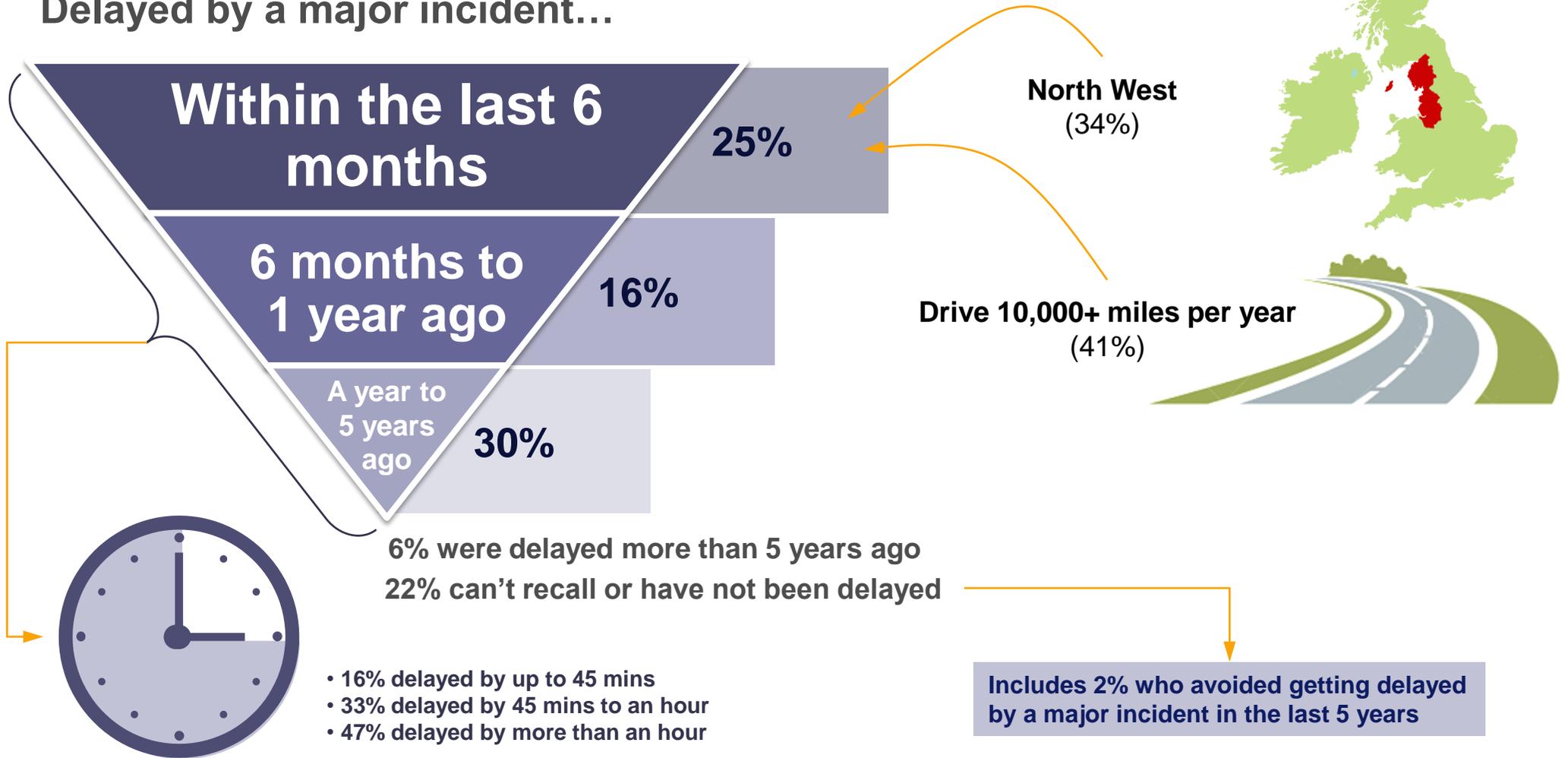
- Variable Message Signs
- Major incidents

Variable Message Signs

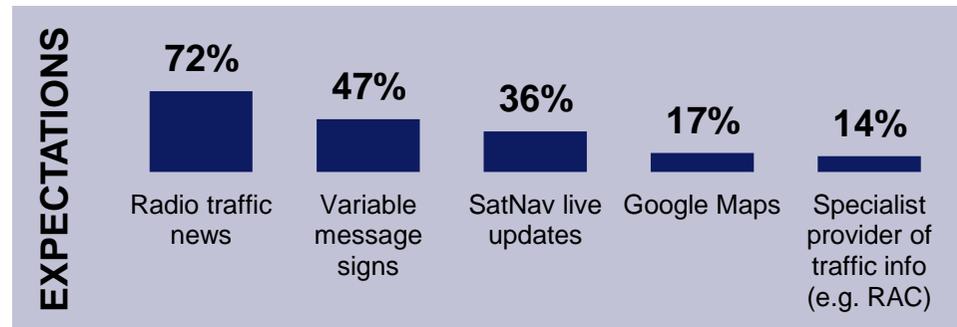
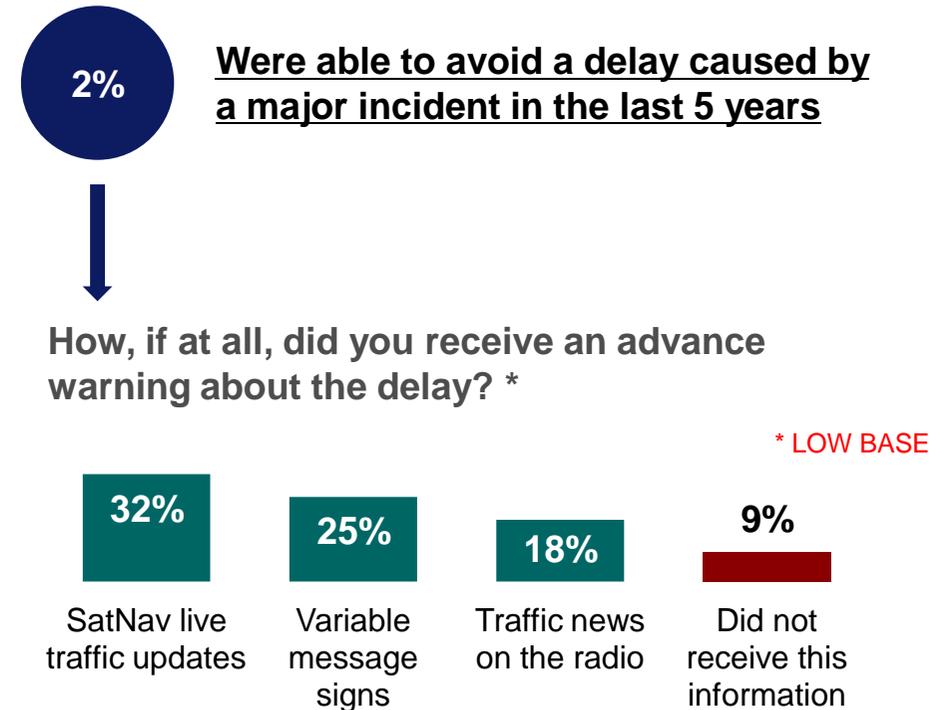
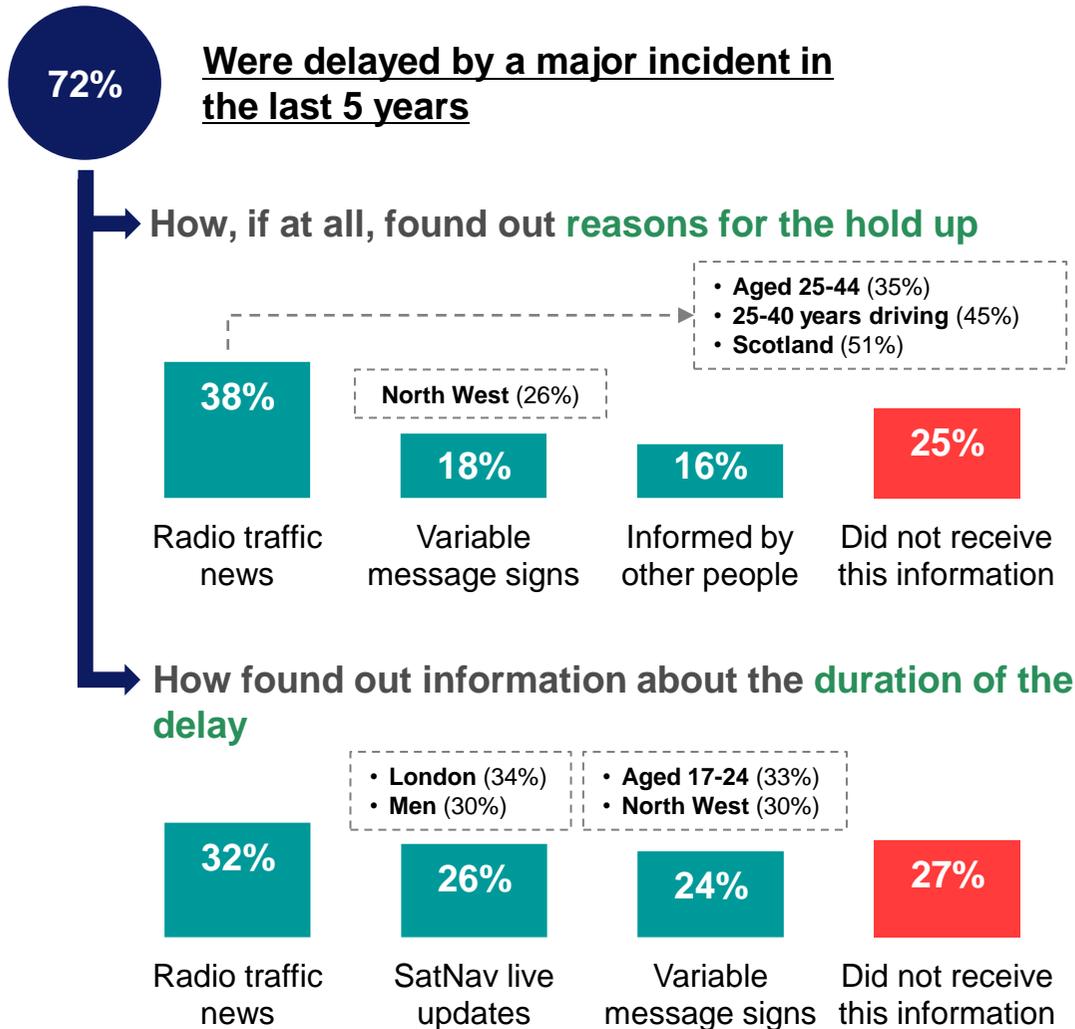


Occurrence and impact of major incidents

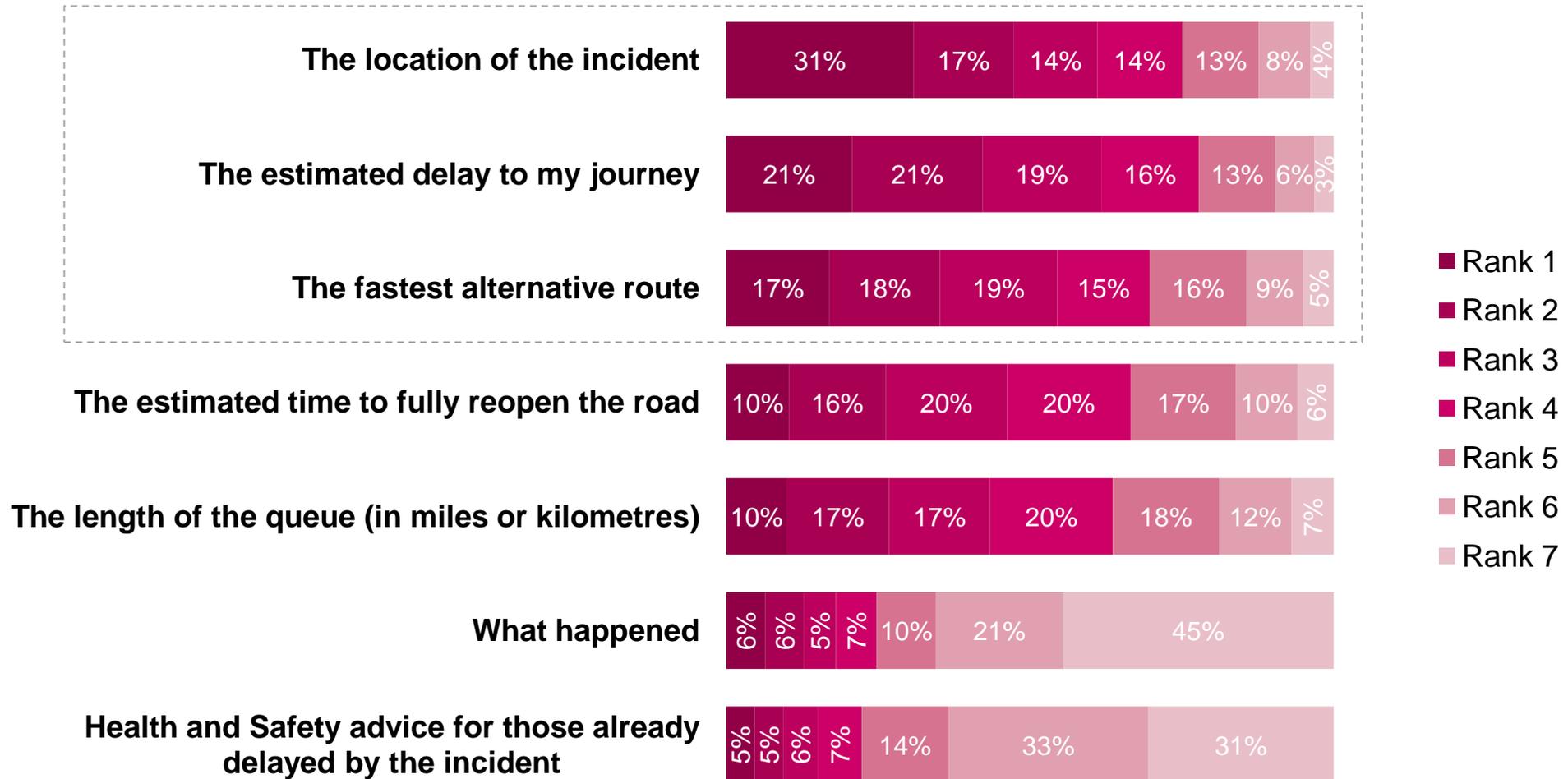
Delayed by a major incident...



Information about major incidents



Importance of information during a major incident



Safety and rules

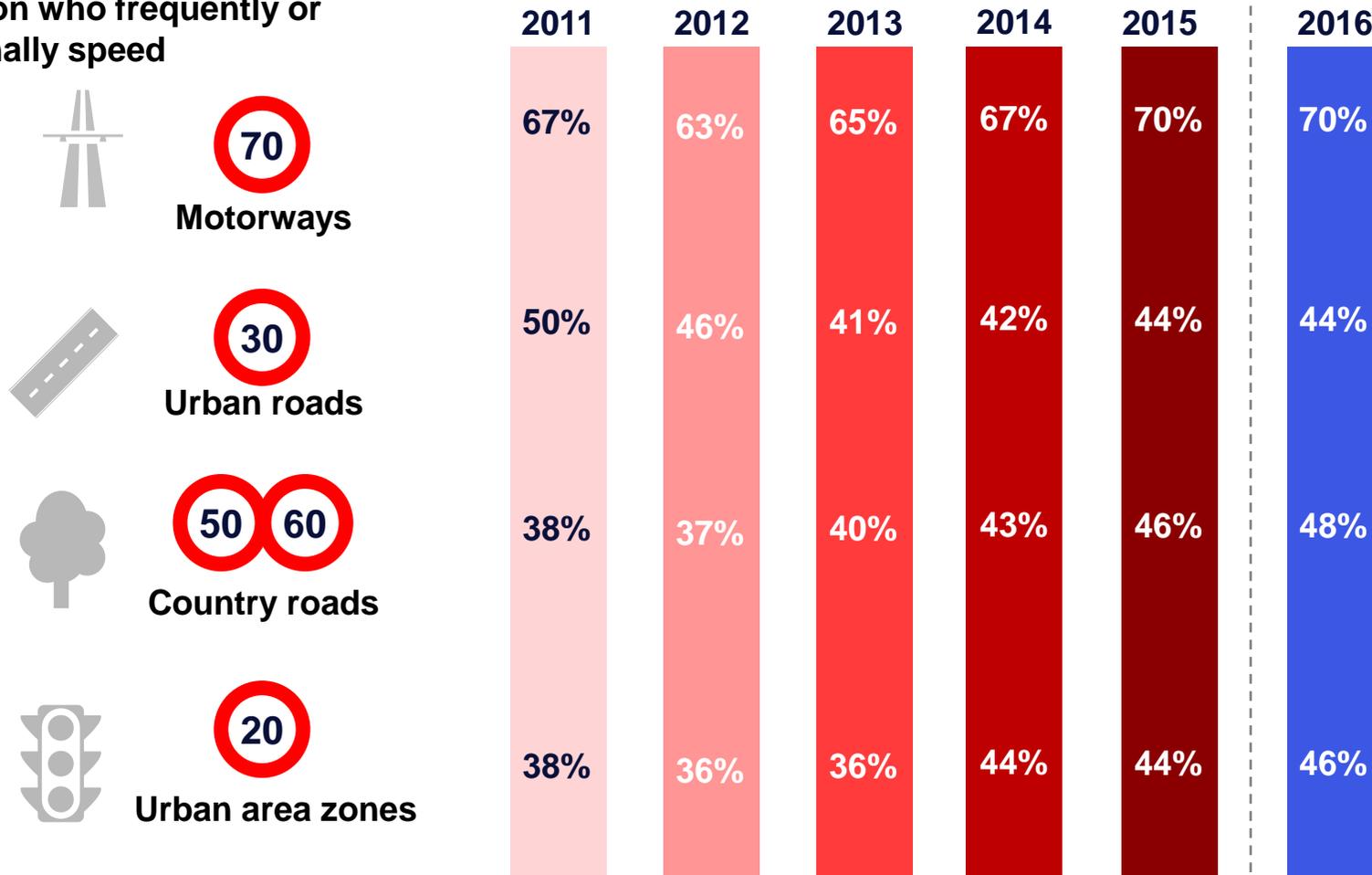
6

- Speed limits and speeding
- Distractions while driving
- Road safety

Breaking the speed limit

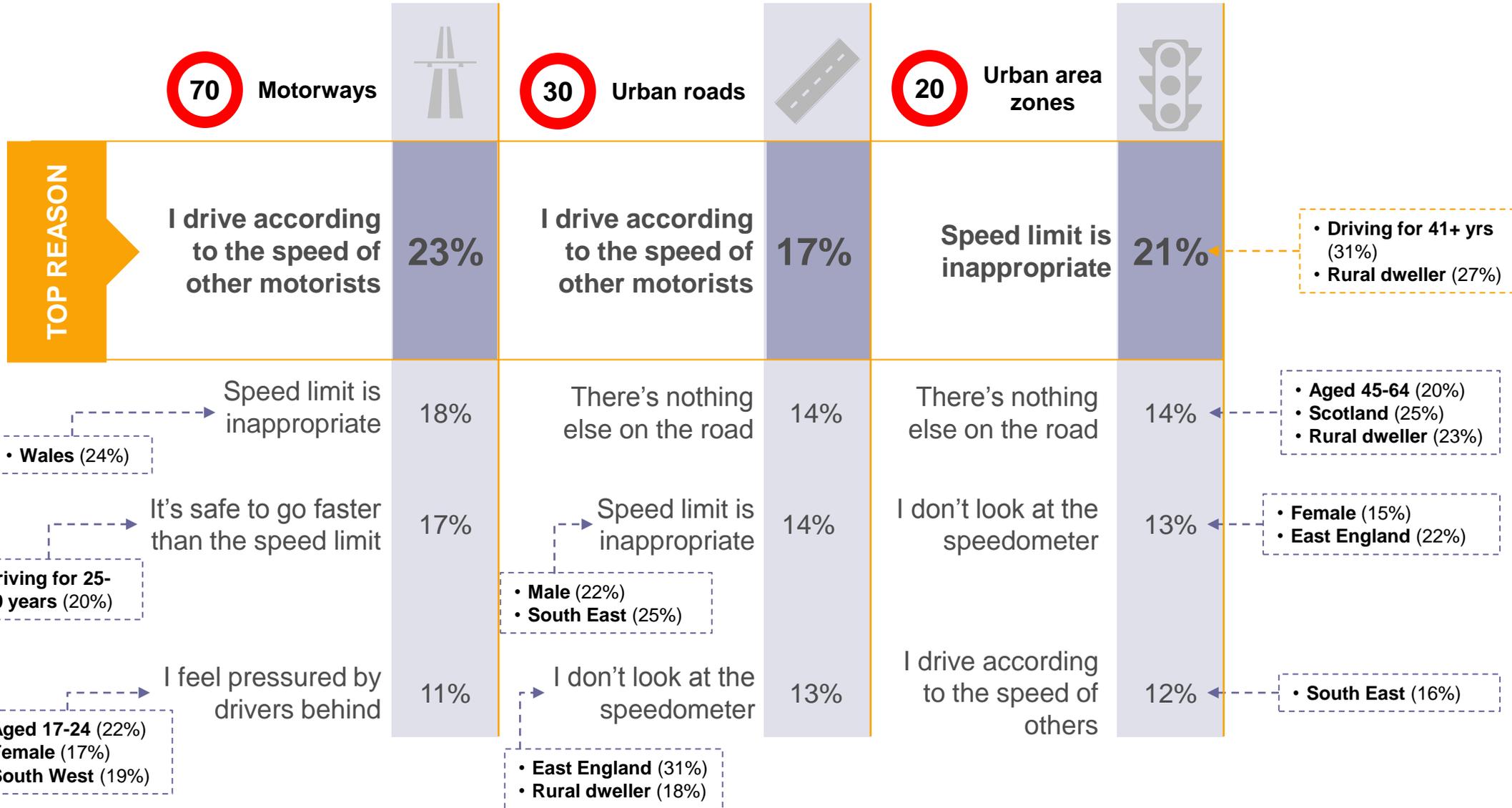
Tendency to break the speed limit increases gradually year on year.

Proportion who frequently or occasionally speed

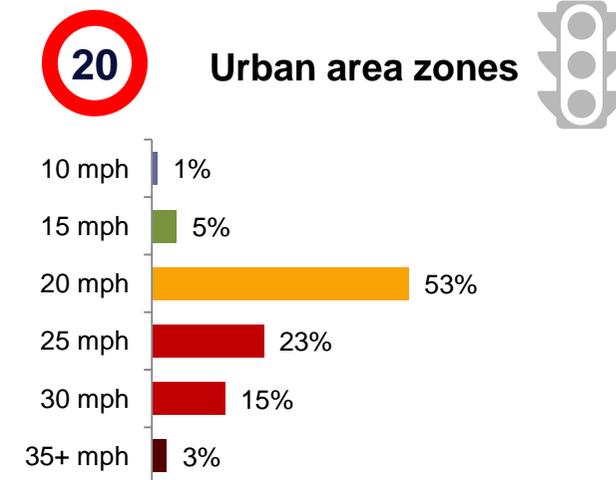
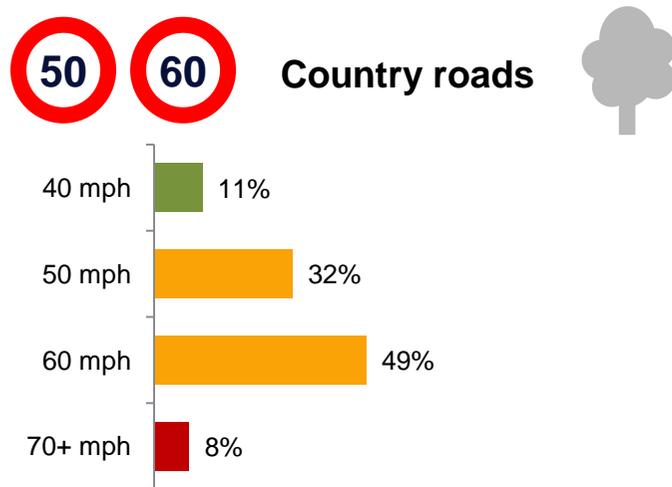
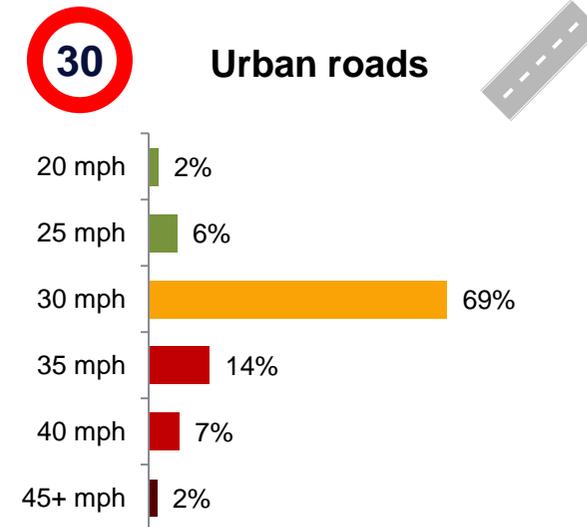
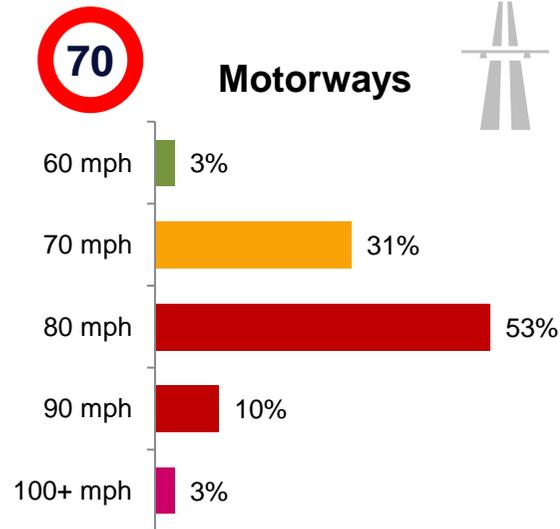


QSI10 And how often do you break the speed limit? 2016, all respondents- 1714; 2015 (1555); 2014 (1526); 2013 (1542); 2012 (1002); 2011 (1002). Bases vary marginally for each road type. Please refer to the tables for exact figures.

Reasons for breaking the speed limit

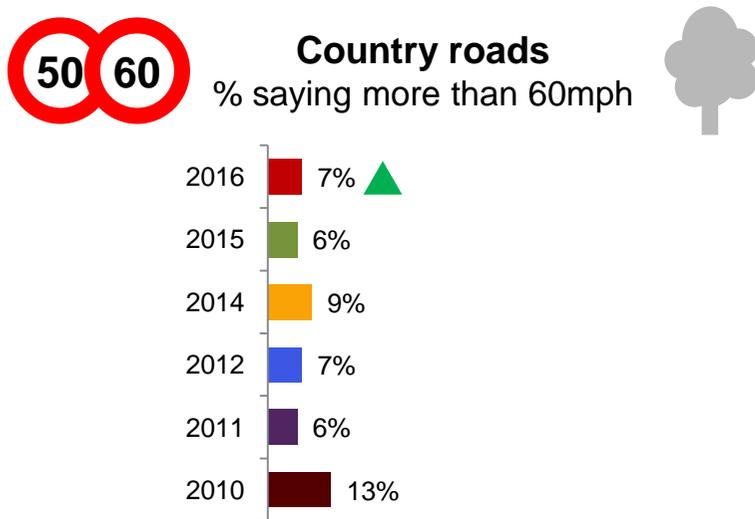
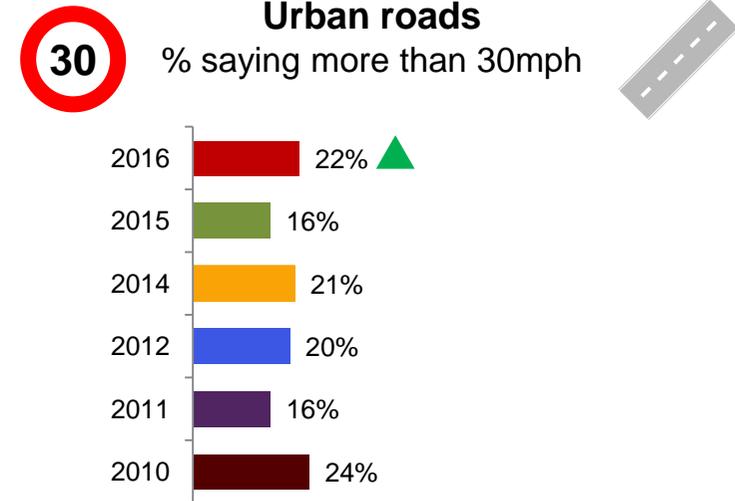
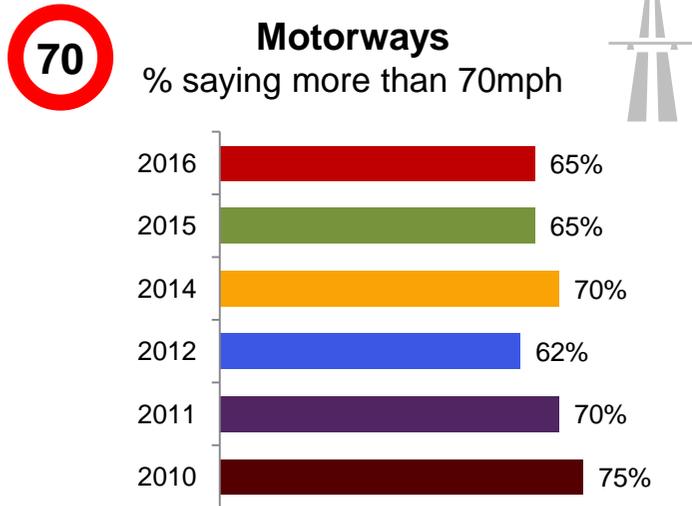


Motorists' views on maximum speed limits



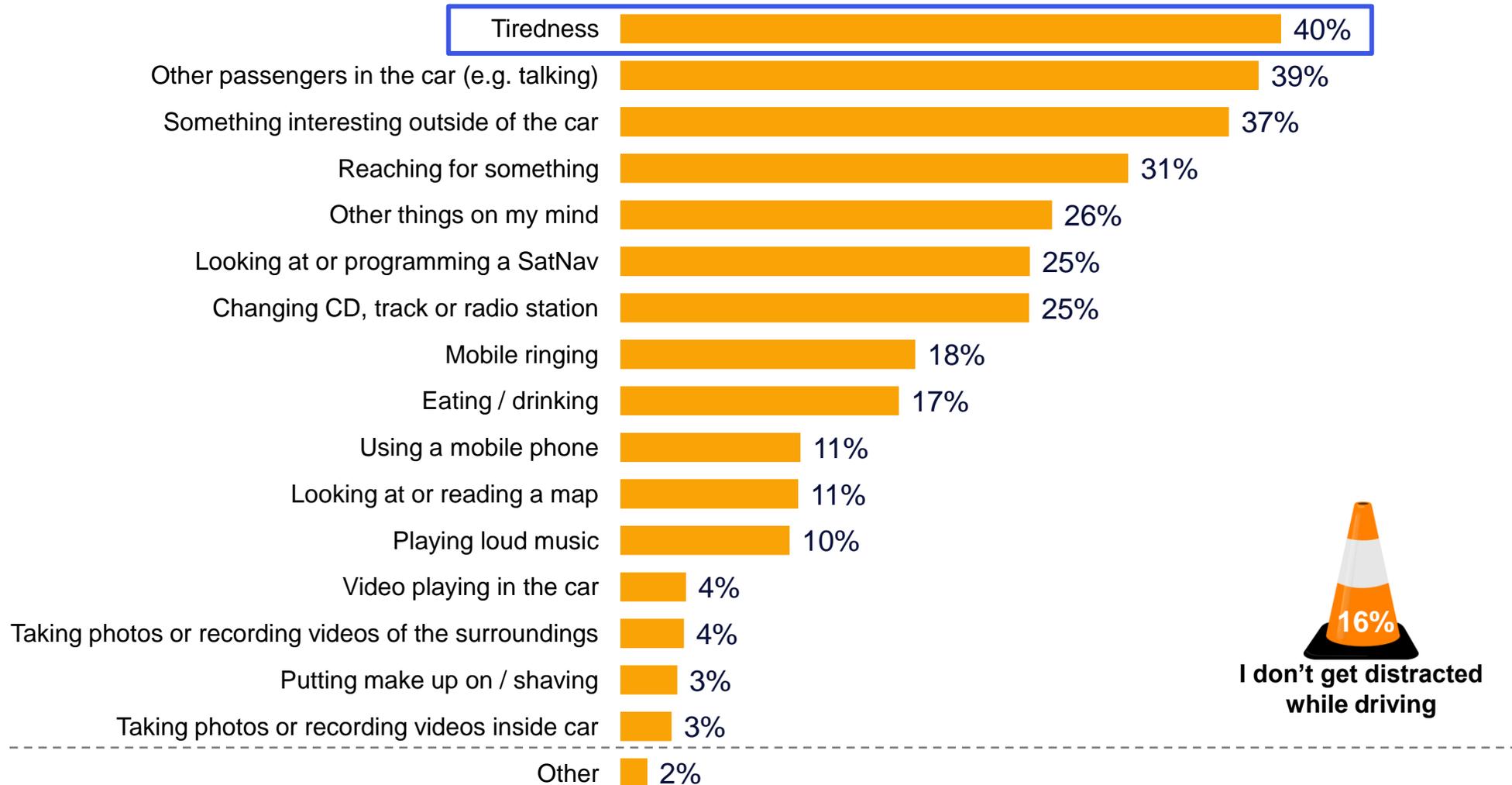
QS112 . What in your opinion should the maximum speed limit be on the following types of road: a) motorways; b) urban roads; c) country roads; d) urban area zones. Bases: all respondents (1714).

Maximum speed limits - over time



Distractions while driving (1)

Tiredness is the number one distraction for drivers.

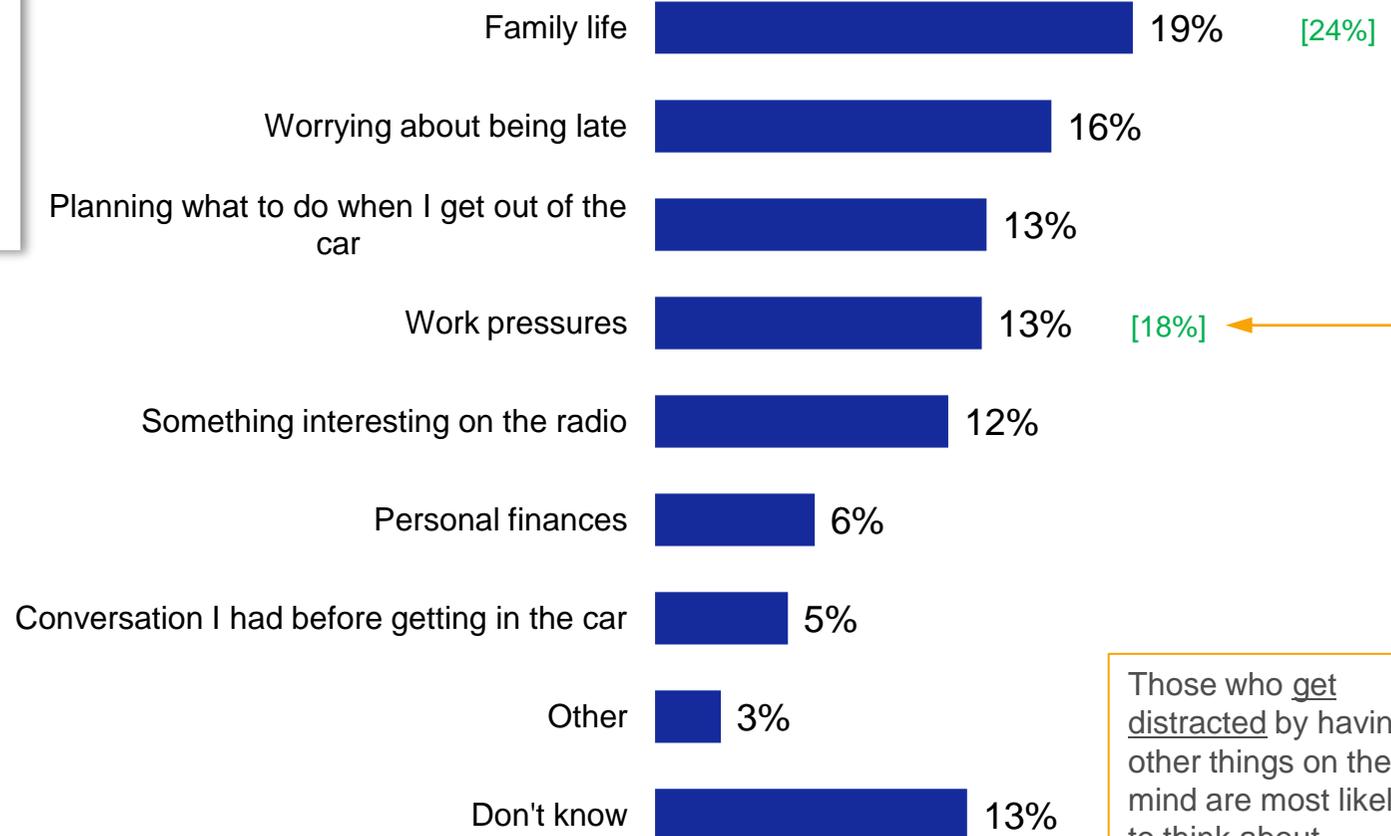


Distractions while driving (2)

Overall, **87%** of motorists may have **other things on their mind** while driving, while only **26%** overall say they get distracted by other thoughts on their mind

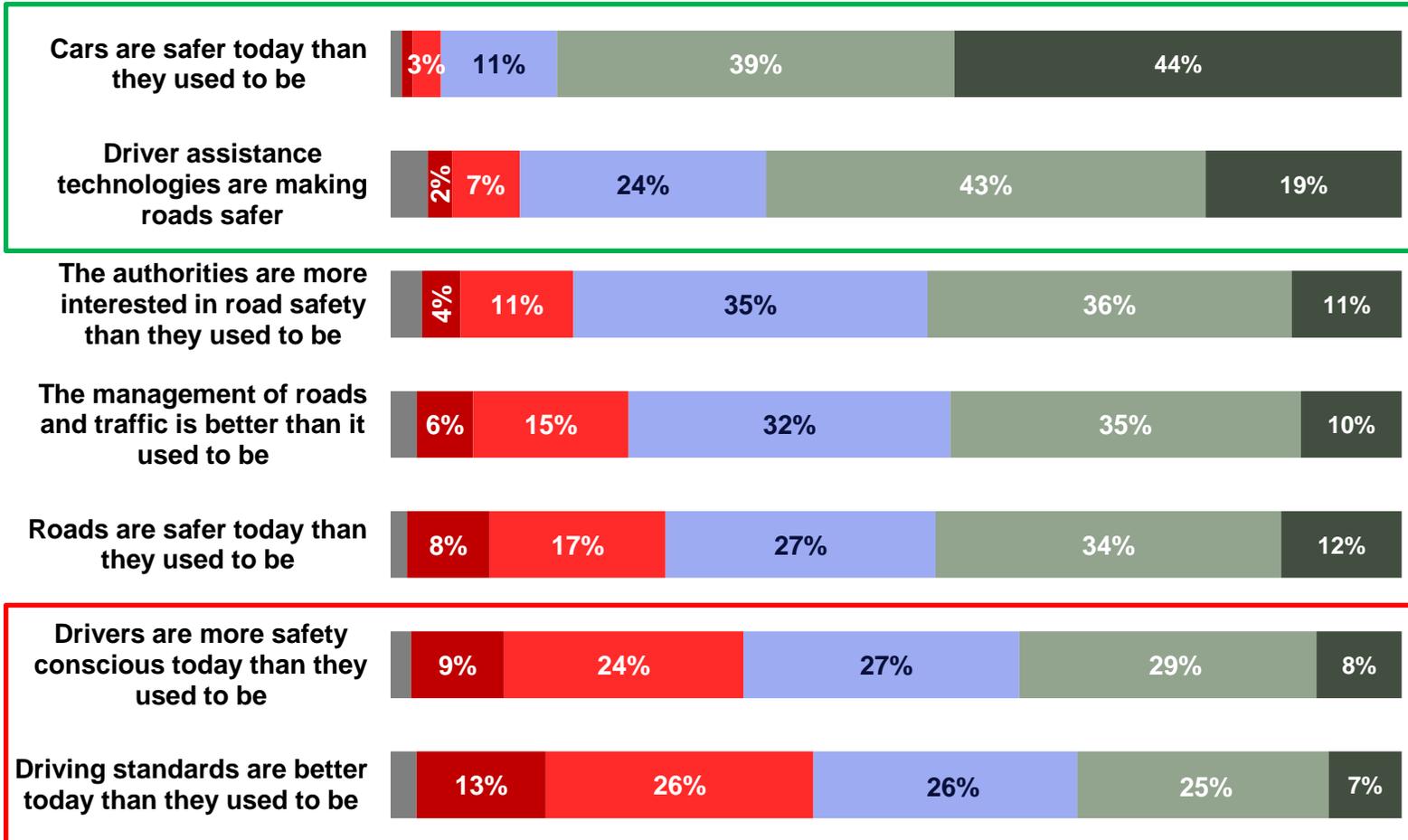


Potential distractions include...



Those who get distracted by having other things on their mind are most likely to think about...

Improvements in road safety



Total agreement over time:

	2013	2014	2015	2016
Cars are safer today than they used to be	86%	82%	86%	84%
Driver assistance technologies are making roads safer	-	-	-	63%
The authorities are more interested in road safety than they used to be	48%	38%	48%	47%
The management of roads and traffic is better than it used to be	29%	25%	40%	45% ▲
Roads are safer today than they used to be	39%	36%	42%	46% ▲
Drivers are more safety conscious today than they used to be	37%	34%	37%	38%
Driving standards are better today than they used to be	19%	17%	30%	32%

■ Don't know ■ Disagree strongly ■ Disagree slightly ■ Neither/ Nor ■ Agree slightly ■ Agree strongly

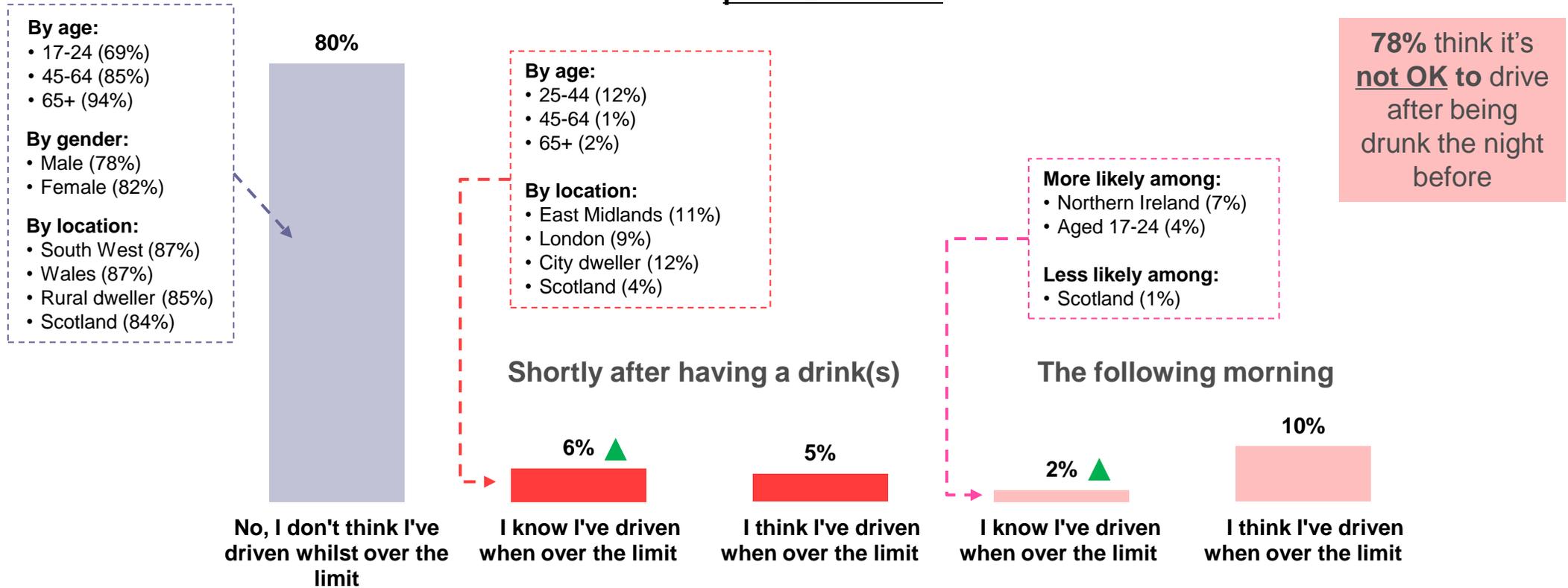
Drink and drug driving

7

- Incidence of drink driving
- Reducing the legal limit
- Incidence of drug driving

Incidence of drink driving

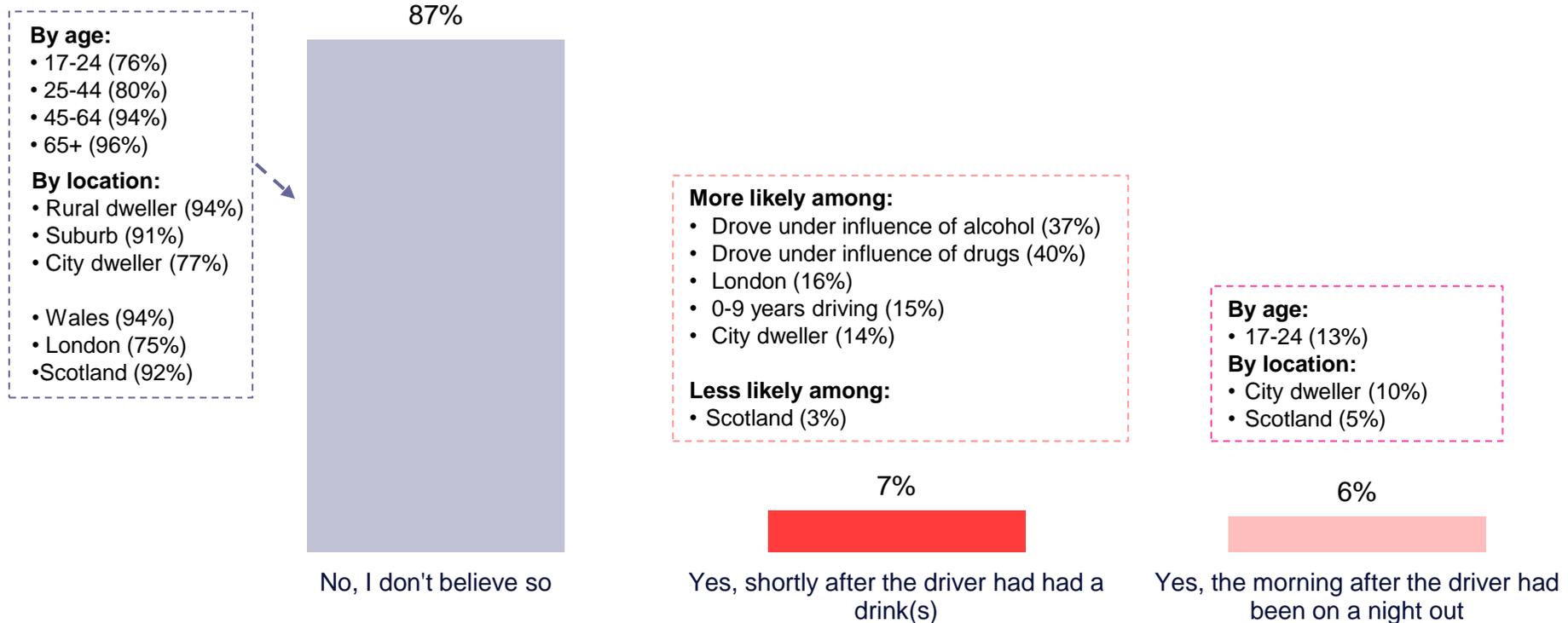
Have you driven when you believed you were above the drink drive limit in the past 12 months?



2015	82%	4%	4%	1%	10%
2014	84%	3%	3%	1%	10%
2012	89%	3%	4%	1%	5%

Drink-drive passengers

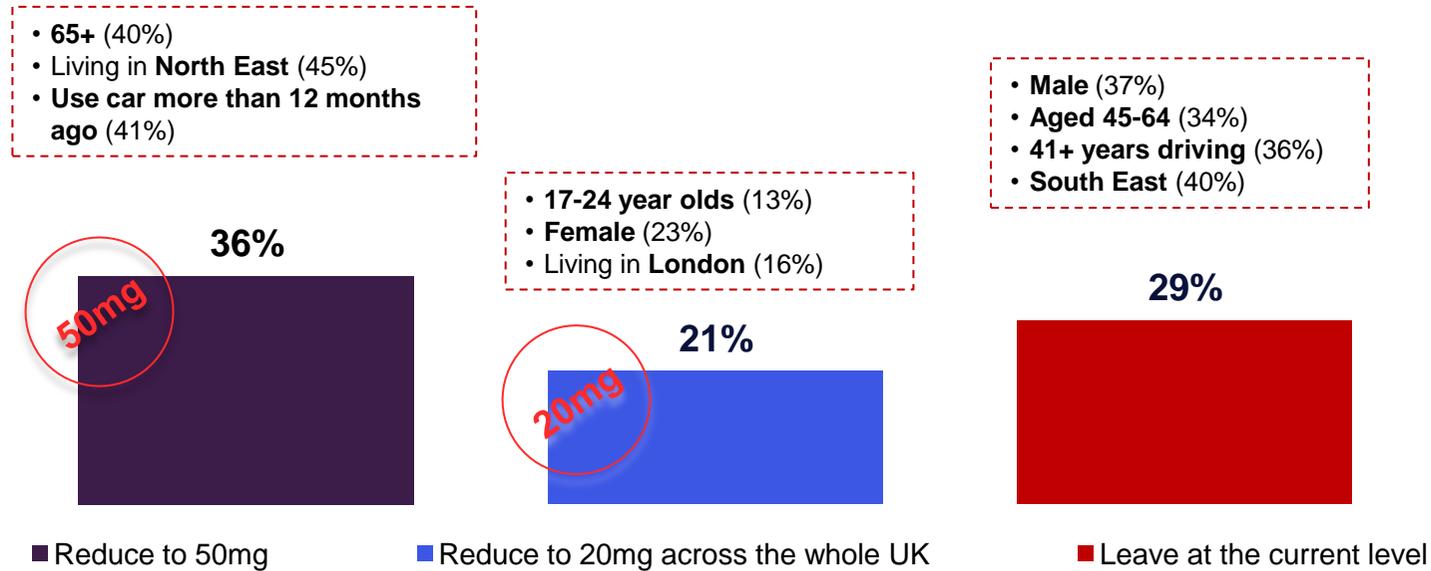
Have you ever been in a car when the driver was above the drink drive limit?



2015	88%	6%	6%
2014	90%	4%	6%
2012	89%	9%	2%

QS14. In the past 12 months have you been in the car when the driver was over the drink drive limit? Bases: All respondents – 2016 (1714), 2015 (1555), 2014 (1526), 2012 (1002), 2011 (1002).

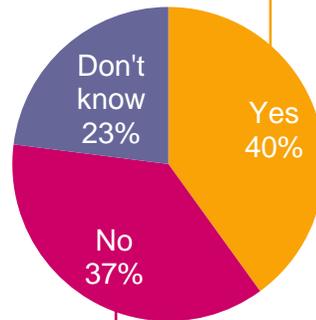
Changing the legal alcohol limit (1)



QSI6. Do you think the legal alcohol limit for driving should be reduced to 50mg of alcohol in every 100ml of blood across the rest of the UK? Bases: All respondents – 2016 (1714), 2015 (1555), Scotland 2016 (177).

Changing the legal alcohol limit (2)

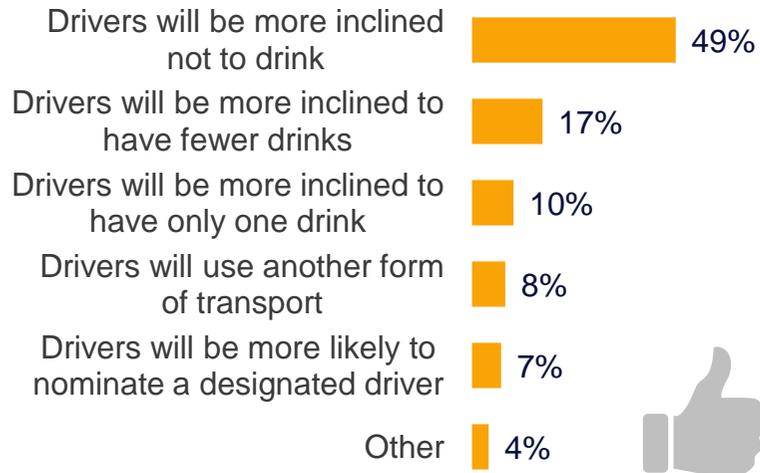
Will changing the drink drive limit make a difference to drink drivers on the roads?



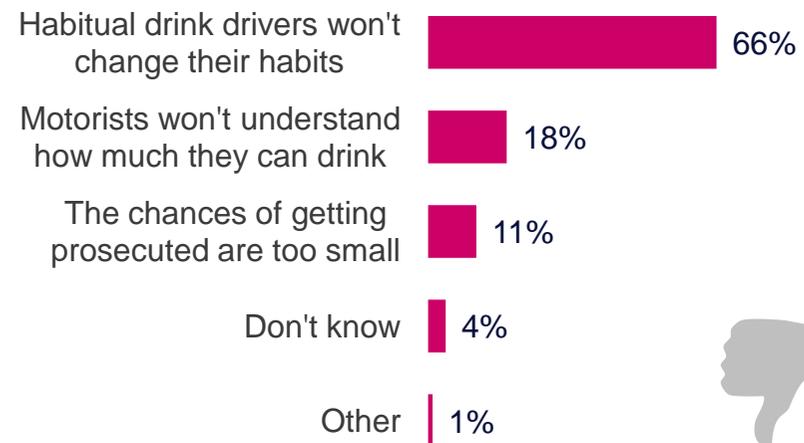
- **Scotland** (60%)
- **Driven under influence of drugs** (48%)

- **65+** (45%)
- **Male** (43%)
- **Yorkshire & the Humber** (43%)
- **Motorway speeders** (40%)
- **Those who know or think they have driven drunk** (42%)

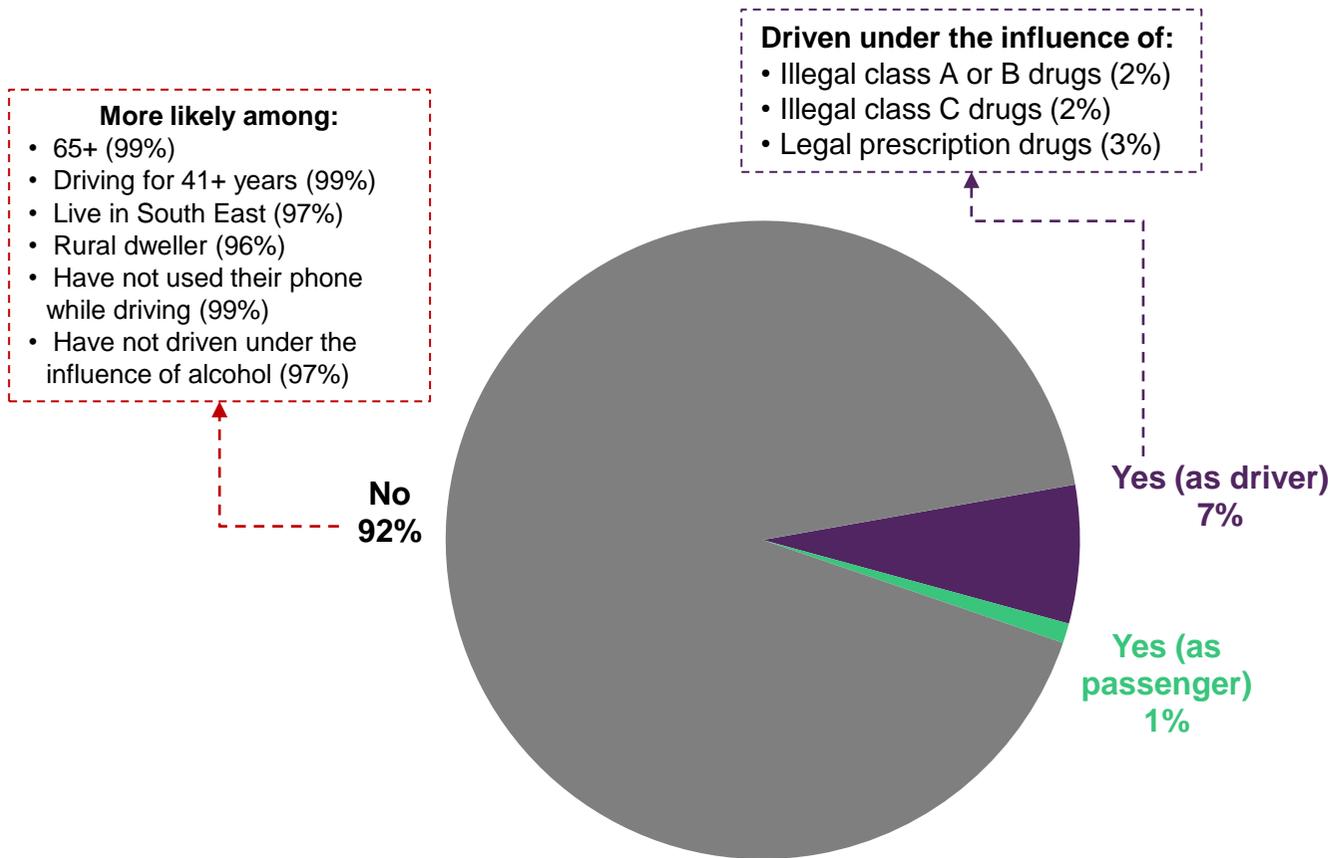
Why changing the limit will make a difference



Why changing the limit will not make a difference



Driving under the influence of drugs



Driven under the influence of... By age

Column %	Class A or B drugs *	Class C drugs *	Legal prescription drugs *
17-24	30%	15%	17%
25-34	38%	54%	40%
35+	32%	31%	43%

* LOW BASES

Year	Yes (as driver)	Yes (as passenger)	No
2015	6%	1%	93%
2014	2%	2%	97%
2012	5%	2%	94%

Hand-held mobile phone usage on the roads

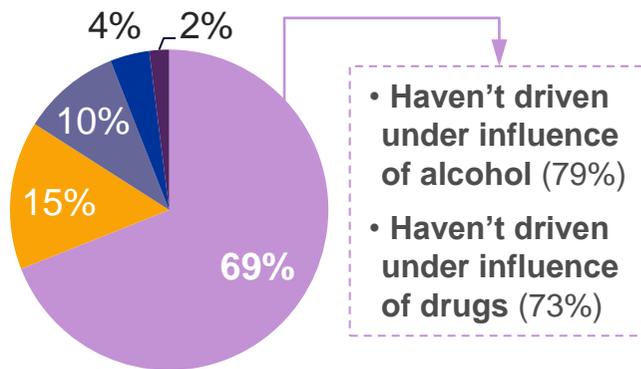
8

- Frequency of use
- Reasons for mobile phone use while in the car (without hands-free)

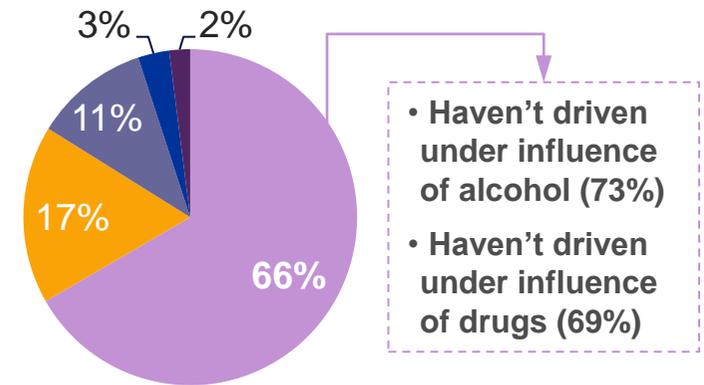
Frequency of mobile phone usage without hands-free

Making or receiving calls whilst driving

Used mobile while driving without hands free

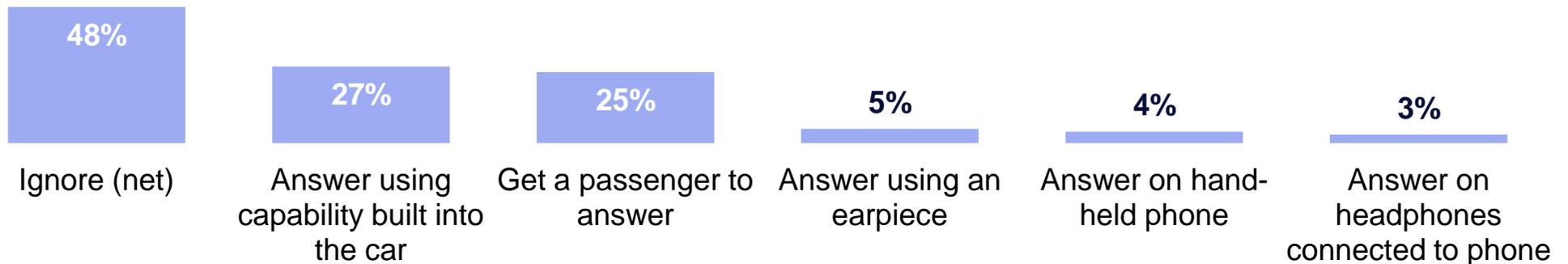


In car while driver used mobile without hands free



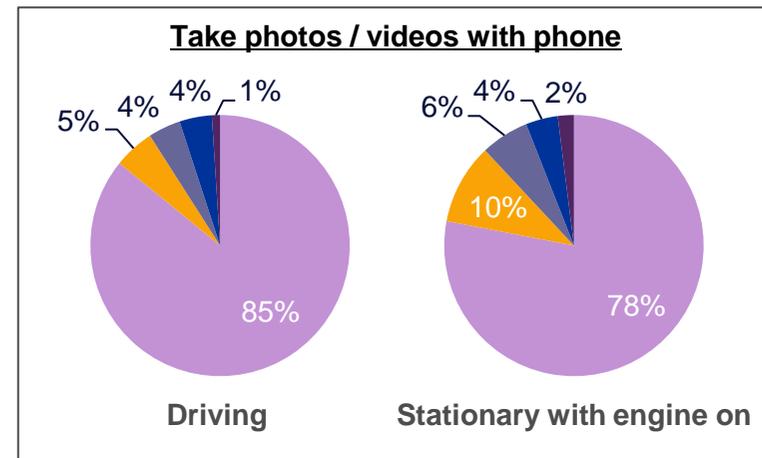
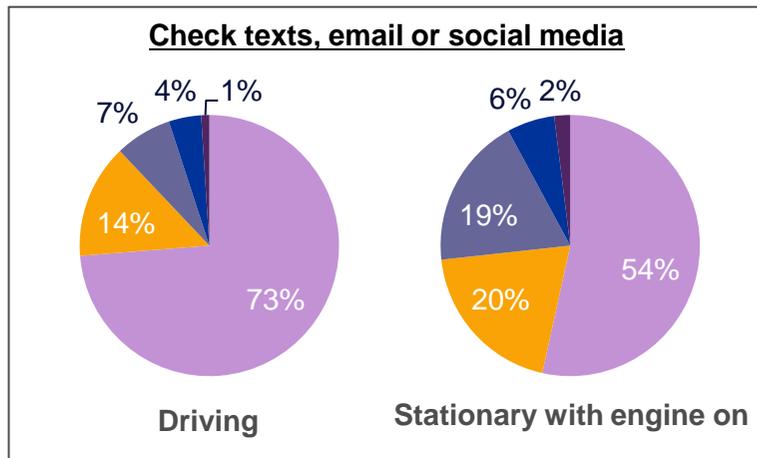
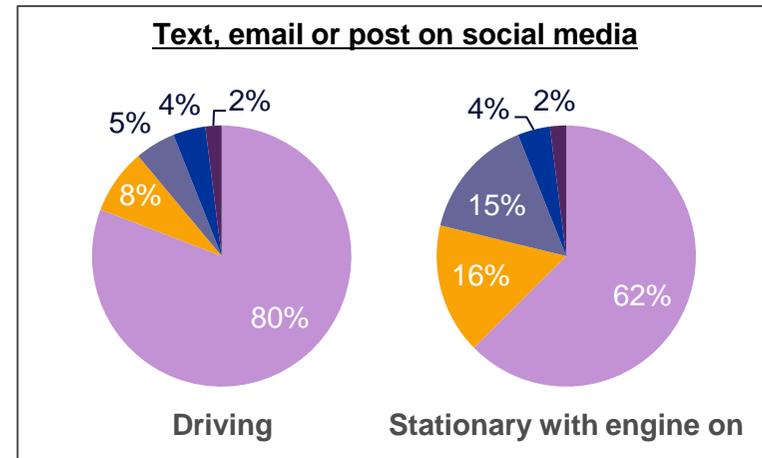
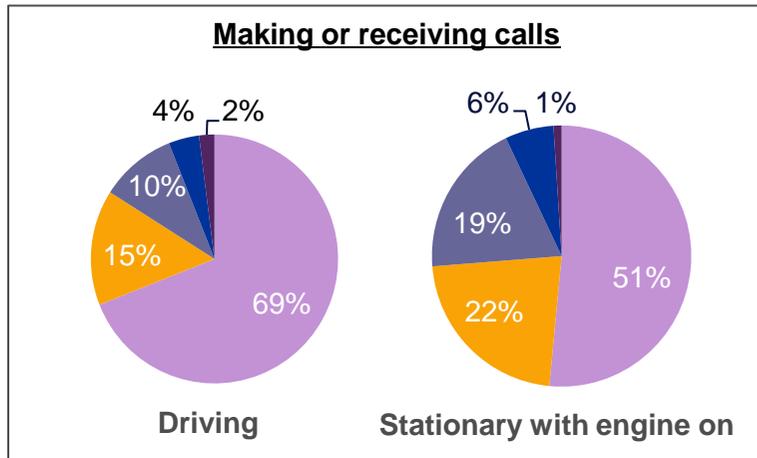
Legend: Never (purple), Rarely (orange), Sometimes (grey-blue), Most of the time (dark blue), All of the time (dark purple)

What drivers would do if they were to receive a phone call while driving...

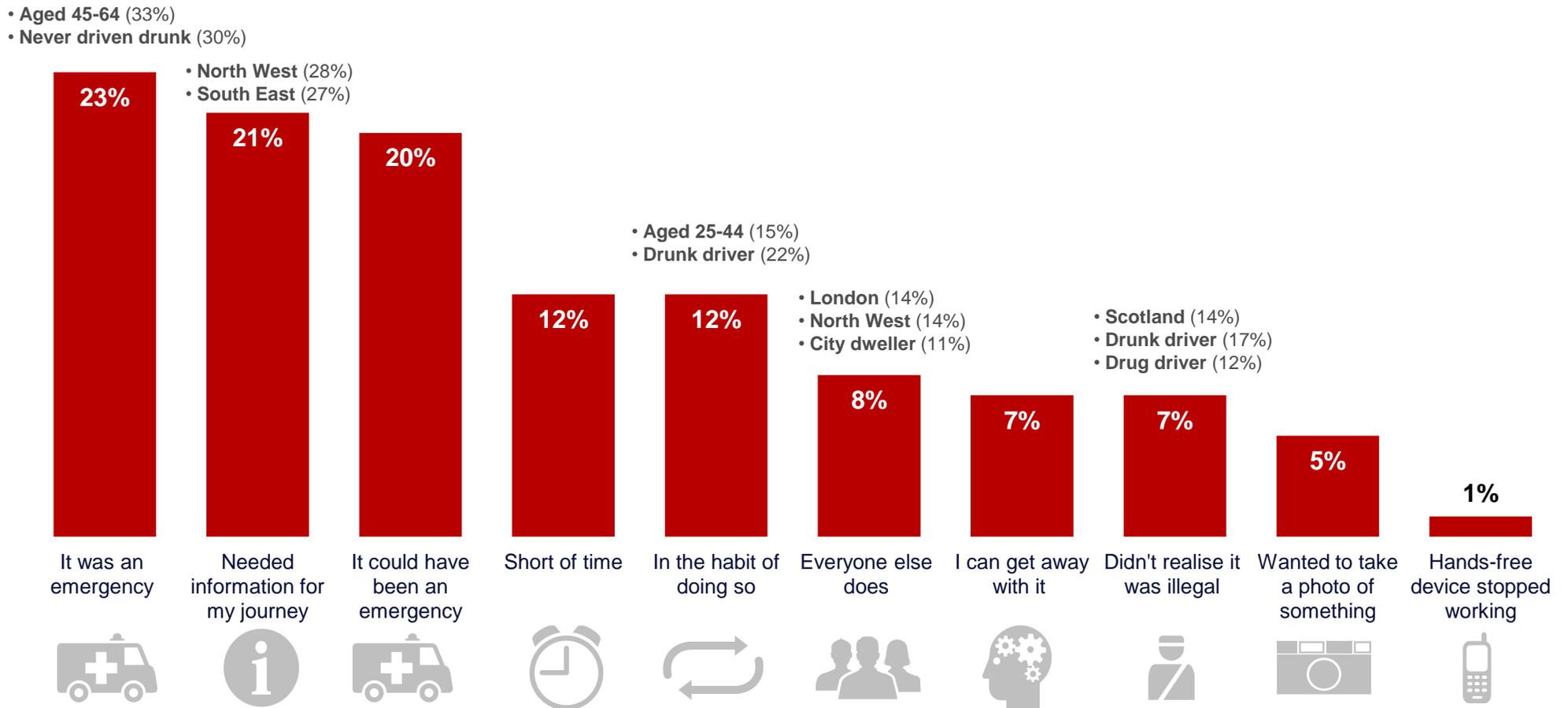


Nature of mobile phone usage while in the car (without hands-free)

■ Never
 ■ Rarely
 ■ Sometimes
 ■ Most of the time
 ■ All of the time



Reasons why used hand-held mobile phone while driving



Is it acceptable to use a hand-held phone while driving?

■ Don't know
 ■ Strongly disagree
 ■ Slightly disagree
 ■ Neither agree nor disagree
 ■ Slightly agree
 ■ Strongly agree

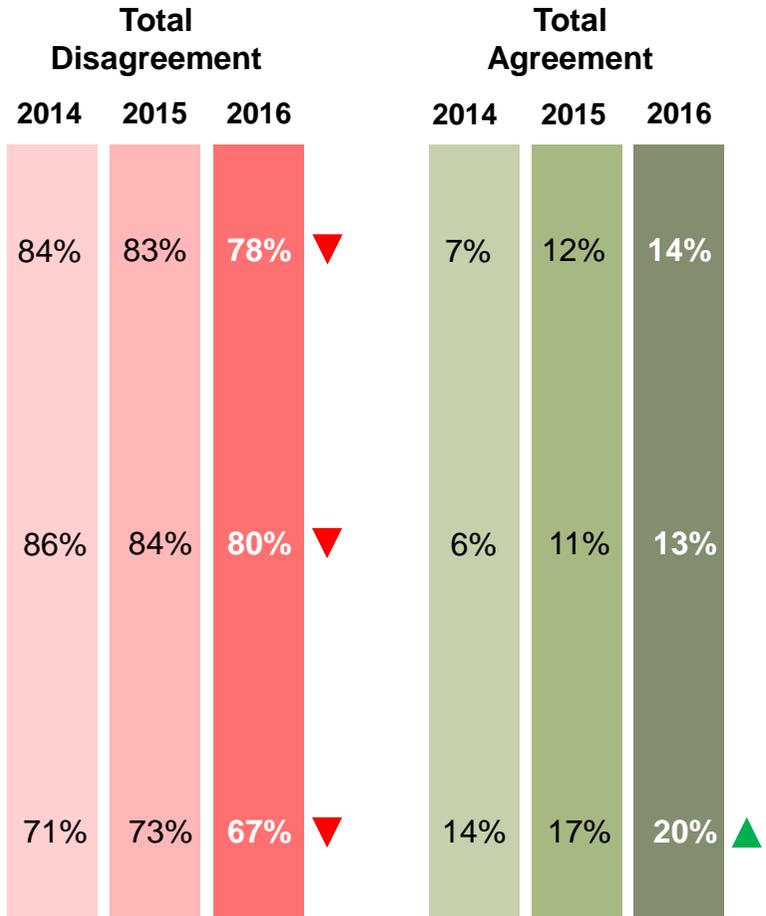
Taking a quick call on your phone not hands-free is acceptable



Taking a long call on your phone not hands-free is acceptable



It is safe to text or check social media on your phone when stationary (e.g. at a traffic light, in congestion)



QSI2. How strongly do you agree or disagree with the following statements? Bases: All respondents – 2016 (1714), 2015 (1555), 2014 (1526).



Quadrangle Research Group
The Butlers Wharf Building
36 Shad Thames
London SE1 2YE
+44 (0)20 7357 9919
www.quadrangle.com

Research and data
Analogue and digital
Customers and money