



# RAC Report on Motoring 2013

Motorists Survey – Full Research Report

RAC RoM Steering Group

April 2013

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**Document prepared for:**

RAC RoM Steering Group

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# Report order.



# Methodology.

## A total sample of 1,542 motorists:

- 1,542 nationally representative for age, gender, socio-economic groups, all GB regions, company car drivers and new car buyers
- Results weighted to be nationally representative along with weighting company car drivers as per market size (8%)

## Survey methodology:

- internet survey (hosted by Research Now)
- panel of GB motorists
- interview length – c.25 minutes

## Fieldwork dates

- Monday 4<sup>th</sup> March – Wednesday 13<sup>th</sup> March 2013

Throughout the report **significant differences** have been noted.

- Significantly higher
- Significantly lower



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

# Key findings.

## 25 years

There is greater expectation of the changes to come in the next 25 years of motoring rather than an appreciation of the changes that have occurred in the past 25 years.

Yet looking back at perceptions 25 years ago via the Lex Report, there has been vast change.

## Motoring costs & taxes

The cost of motoring is the number one concern in 2013, and also the largest perceived change in the past 25 years. In these economic times motorists continue to look for ways to reduce costs whether via insurance or driving less.

Taxation of motorists continues to vex drivers and most would like to see a redistribution of how motoring tax is collected, favouring a 'not in my back yard' approach.

## Green motoring

Whilst green motoring may be perceived to be on the decline, motorists themselves say they are more concerned than ever before. Financial constraints might align with being green but consumers think it is important in its own right and one of the key changes expected over the next 25 years.

## Safety & technology

Technology is largely seen through a positive lens in terms of safety and ease but it can be a distraction and it isn't fully utilised. 'Courtesy' may be on the decline spreading from the city to rural areas.

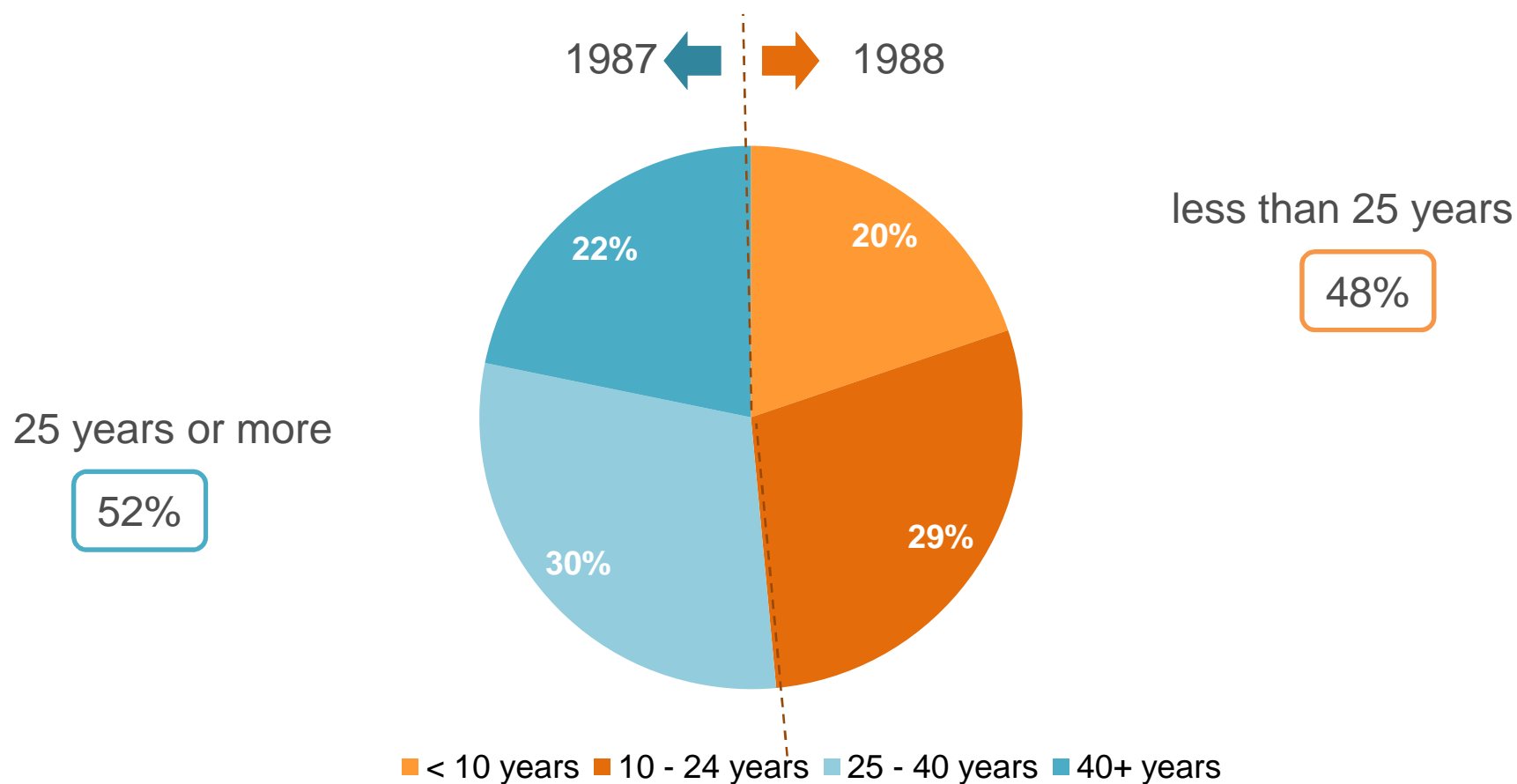
## Young drivers

More may need to be done to equip young drivers with the skills and confidence to navigate today's roads. Whilst young drivers might be an emotional issue in truth there are issues of more concern for motorists.

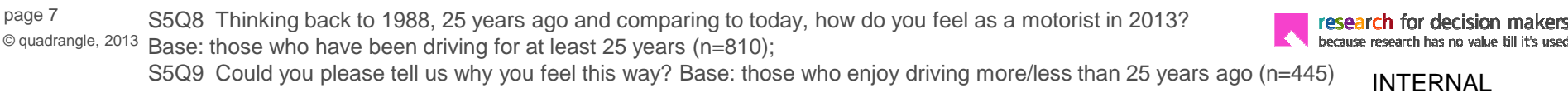


25 years of motoring.

# Length of time driving.

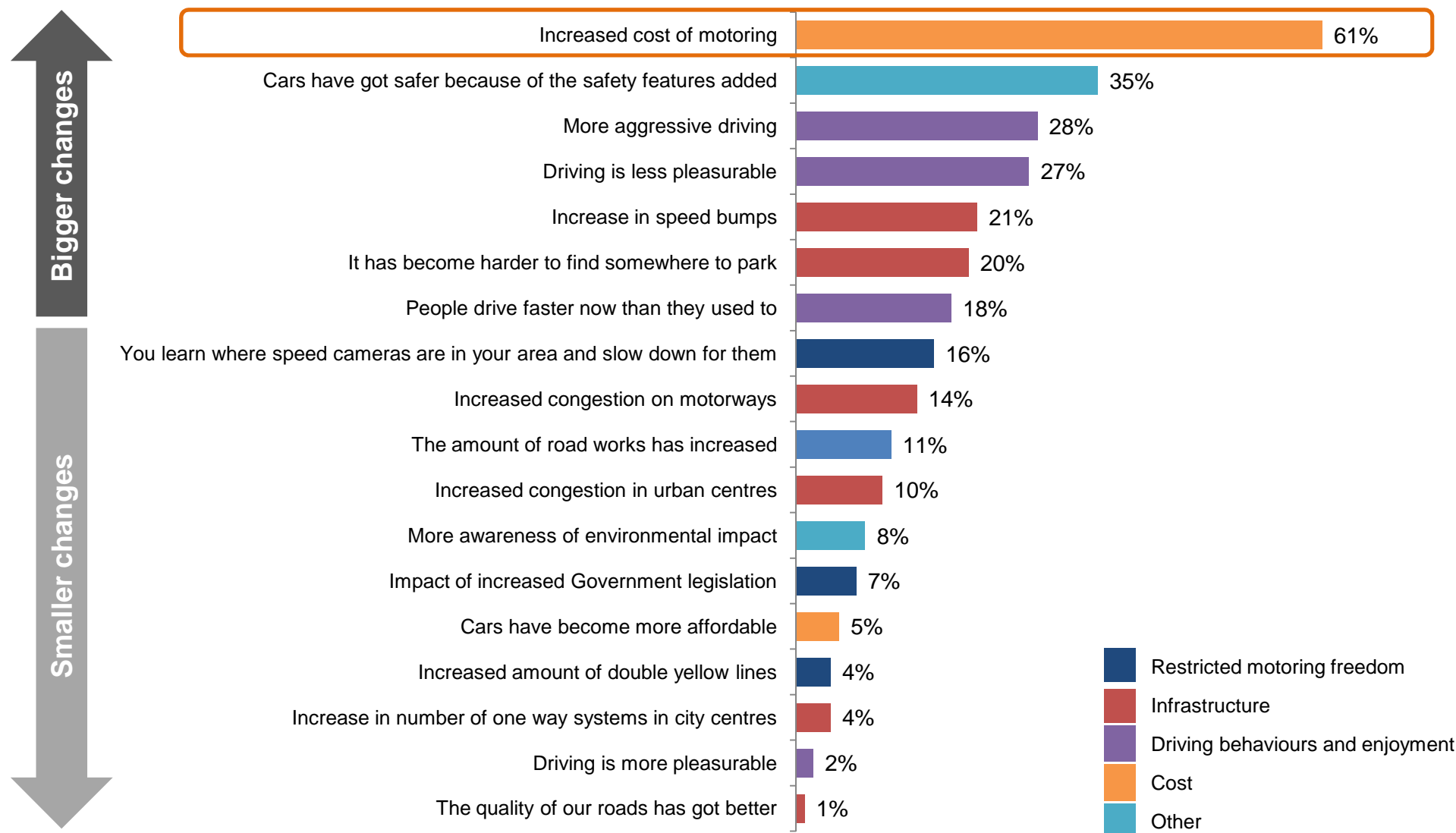


Nearly half of drivers enjoyed driving more 25 years ago than they do today. The most commonly cited reasons are increased congestion, more road rage and poor driving in general.



# Changes in motoring since 1988.

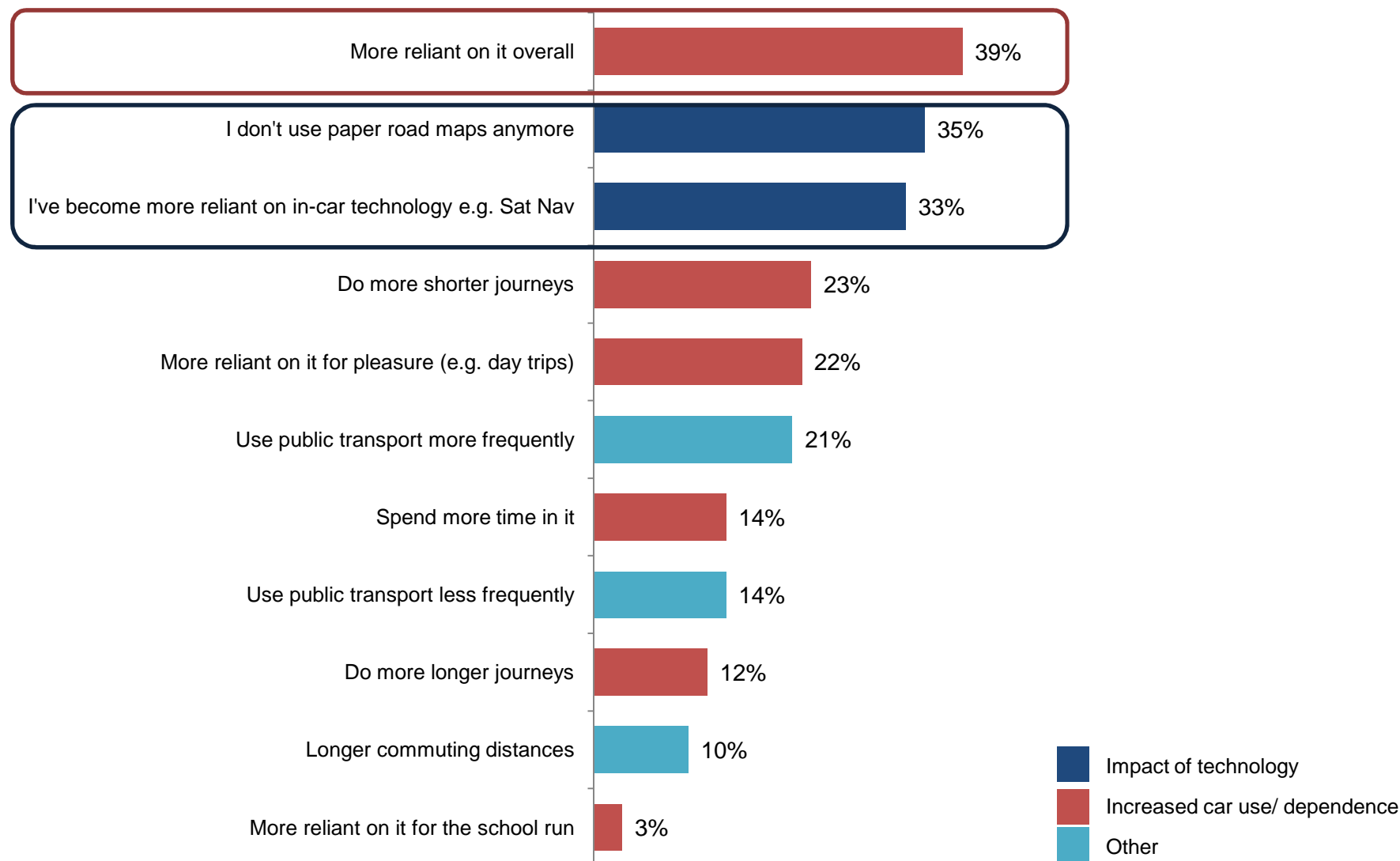
The most noticeable change has been an increase in the cost of motoring, especially felt by those in the suburbs, rural areas and Wales and Scotland.





# Changes in car use since 1988.

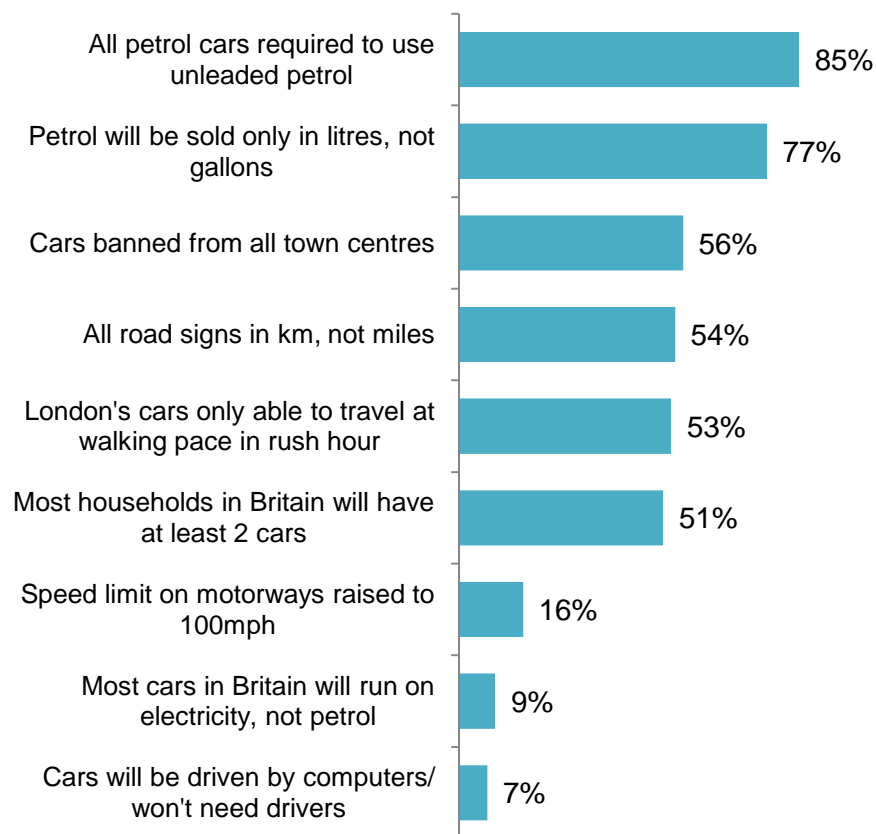
4 in 10 drivers are more reliant on their cars today than they were 25 years ago, particularly those aged 65+, females and C2DE. It is also commonly acknowledged that technology has changed driving habits.



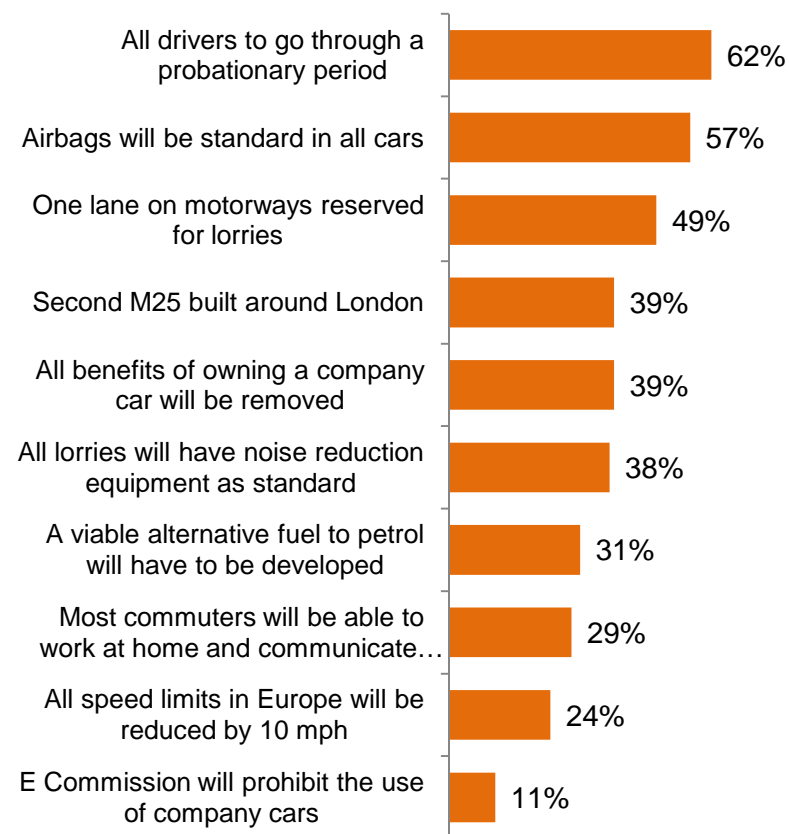
# 'Back to the Future'.

Although motorists may be conservative in their evaluation of how motoring has changed in the last 25 years, a glance at past RoM research shows the extent to which the face of motoring has changed...

## In 1989: what will 2001 look like?



## In 1993: what will 2013 look like?



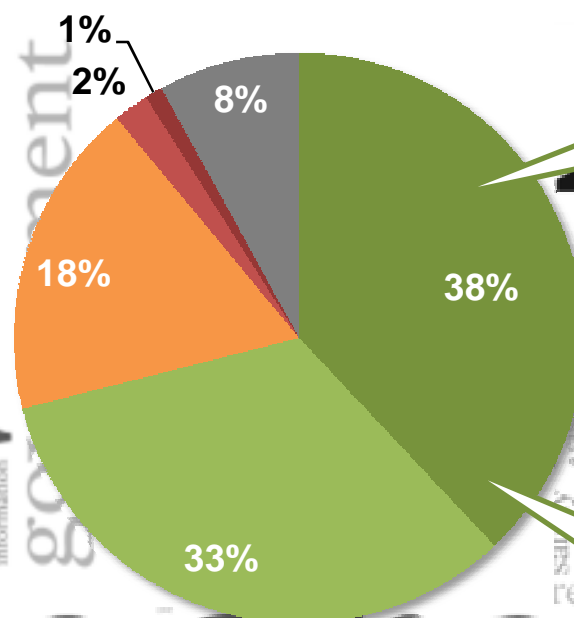
# Government involvement now vs. 1988.

7 in 10 agree that the Government is more intrusive in motoring affairs today, especially males and C2DE.

The most common complaints are an increase in the use of speed cameras and higher motoring taxes.

**90%**

believe that motorists are hit by high taxes as they are easy targets for Government



"There seems to be more political figures having their say on all motoring related topics whether it be road safety, road conditions or motoring taxes."  
Female, 25-44, Yorks & Humber, Mazda 2, 3-6k miles/year

"The Government are meddling too much, introducing tolls and congestion charges as well as far too many speed cameras, that are implemented with absolutely nothing to do with slowing drivers down, and more to do with making money. It's immoral."  
Female, 25-44, Scotland, Audi A5, 6-9k miles/year

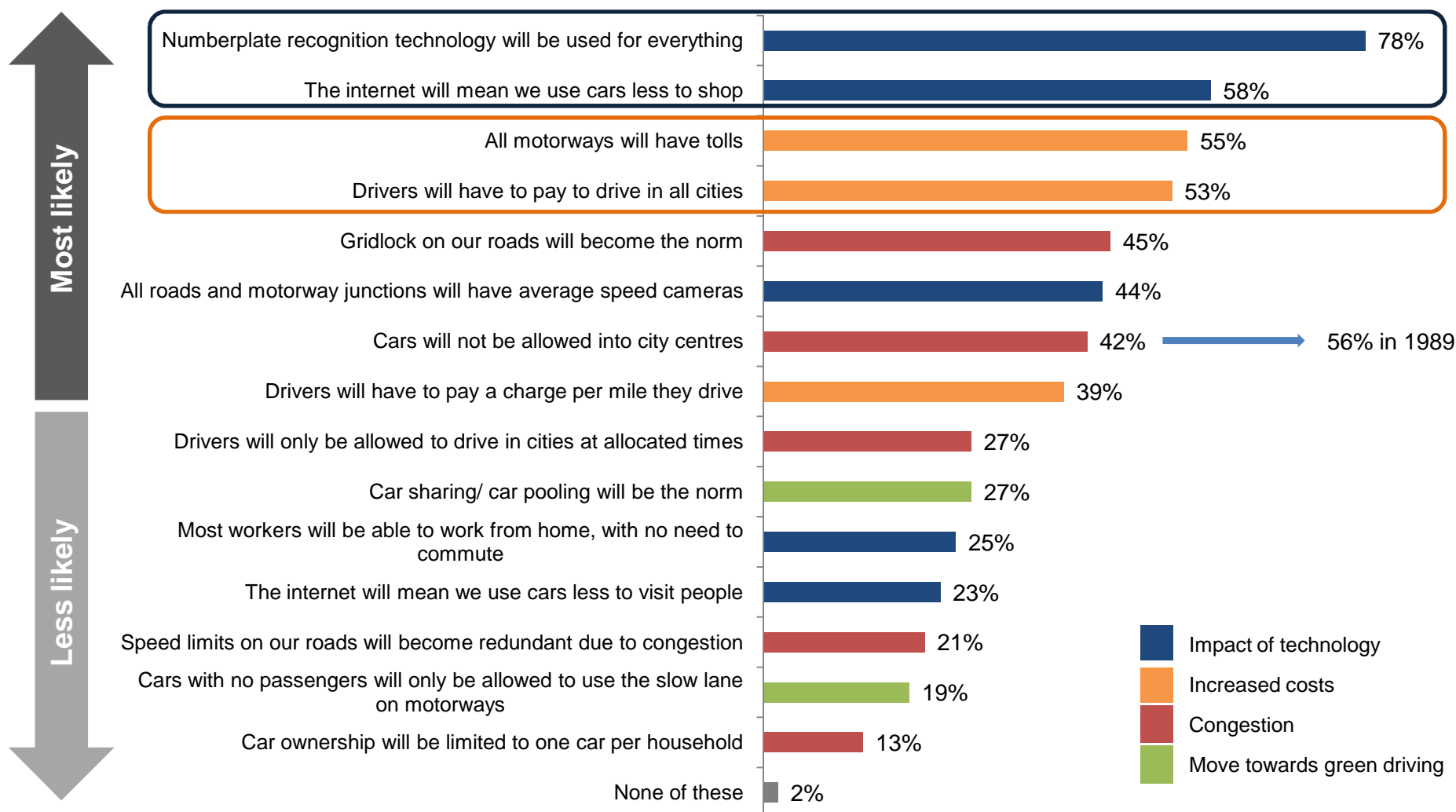
## Top 3 examples of Government intrusion

- Cameras/ speed cameras (27%)
- Increased taxes/ general costs (23%)
- Fuel prices/ increased fuel taxes (20%)

- Agree strongly
- Agree slightly
- Neither/nor
- Disagree slightly
- Disagree strongly
- Don't know

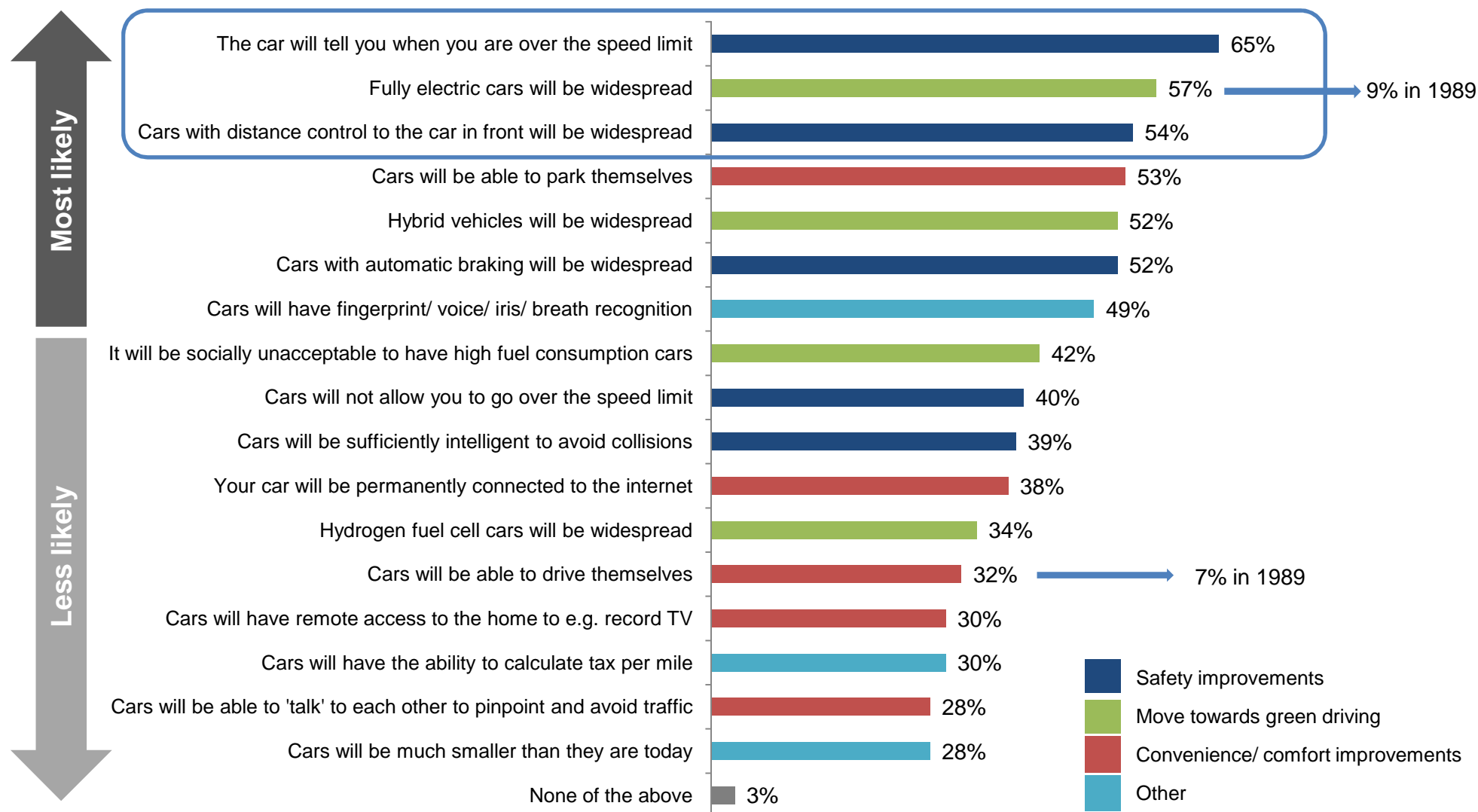
# How will we use cars in 25 years' time?

Motorists predict that emerging trends in the last 25 years will continue, with technology influencing our driving habits and policy enforcement, and motorway and city centre motoring charges becoming widespread.



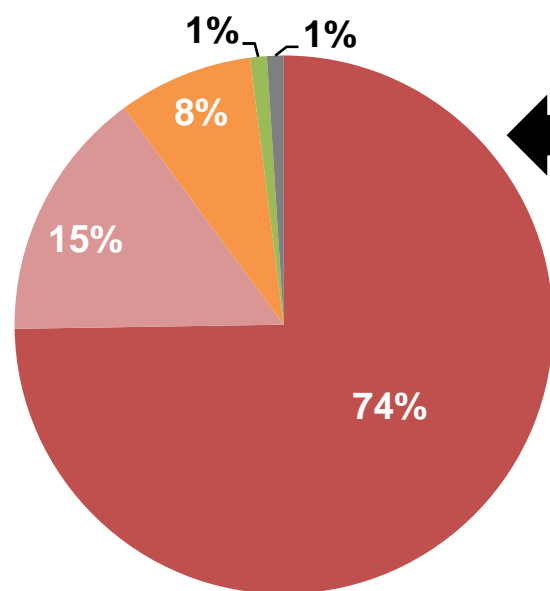
# What will cars be like in 25 years' time?

Technology is also predicted to have a broad impact on car design, with improved safety features to prevent speeding and collisions, and green motoring options entering the mainstream.

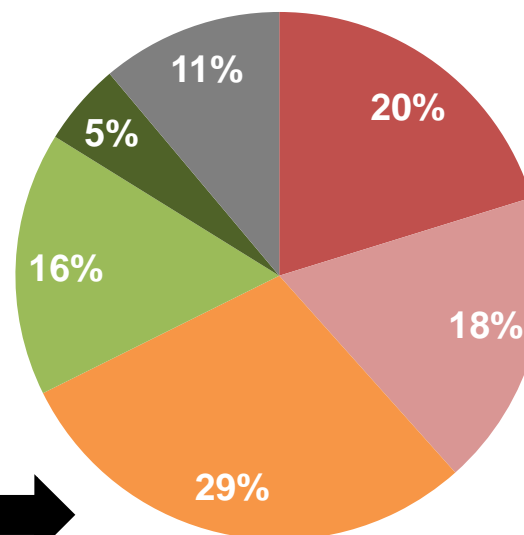
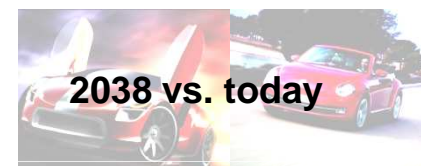


# Car dependency in the UK.

Motorists feel we are much more dependent on our cars than 25 years ago and few (21%) feel we'll be using them less in 2038.



- Much more dependent on cars now
- A little more dependent
- No change
- A little less dependent on cars now
- Don't know



- Much more dependent on cars in 2038
- A little more dependent
- No change
- A little less dependent
- Much less dependent on cars in 2038
- Don't know

We asked motorists:

How dependent they were on their car **now** compared to **25 years ago**

and

How dependent they thought they *would be* on their car in **25 years' time**, compared to **today**



# Cost of motoring.

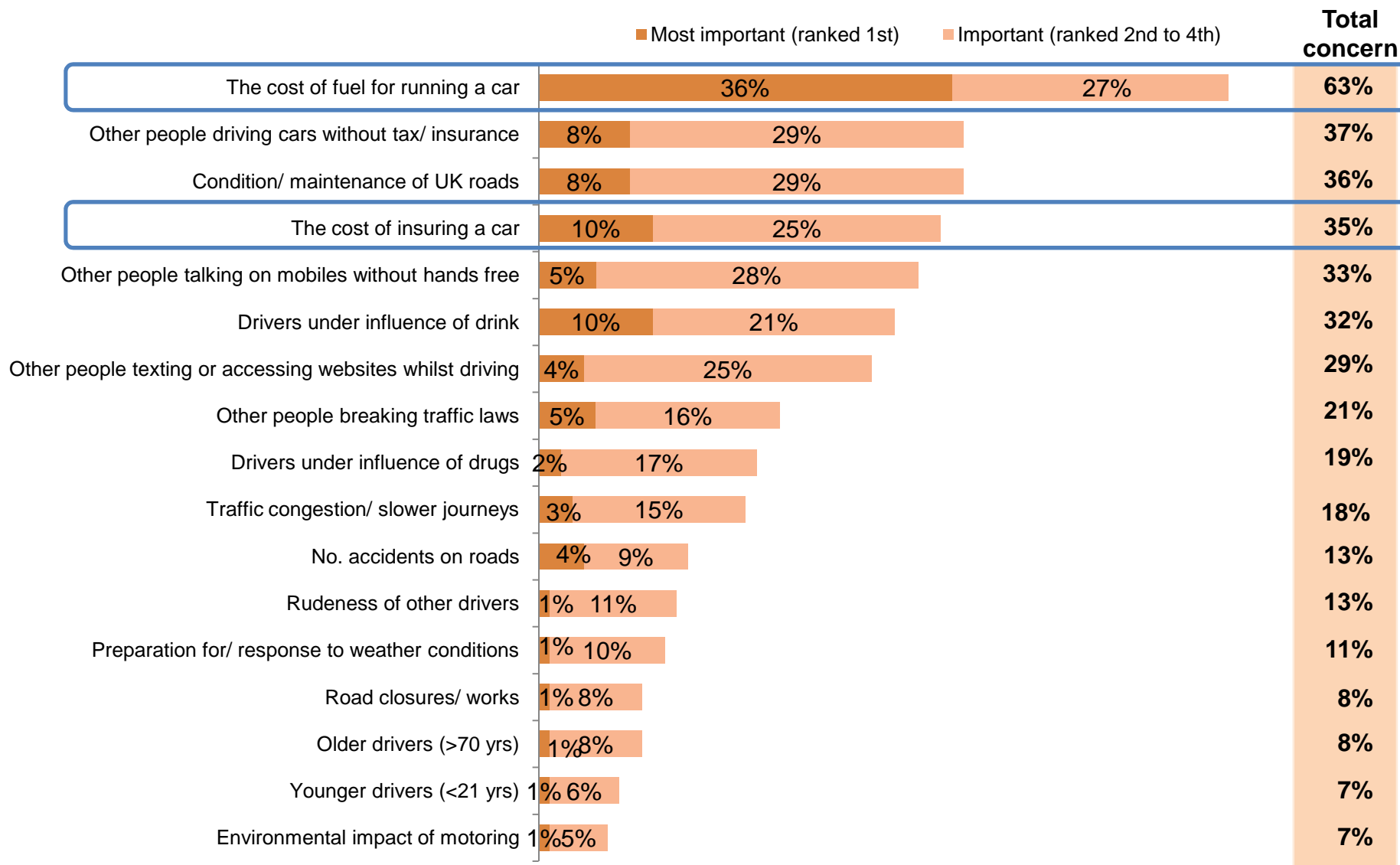


## i. Motoring costs.



# Issues that most concern motorists.

Cost is the leading concern for nearly half of motorists, with the cost of fuel being a particular worry (especially for younger drivers and those with 4x4 vehicles or sports cars).



# Issues of concern – by region.

The cost of fuel is the most important concern for motorists across all GB regions. However there are differences in regional concern for certain issues, for example, Londoners are particularly concerned by road closures.

Significantly higher,  
compared to other regions

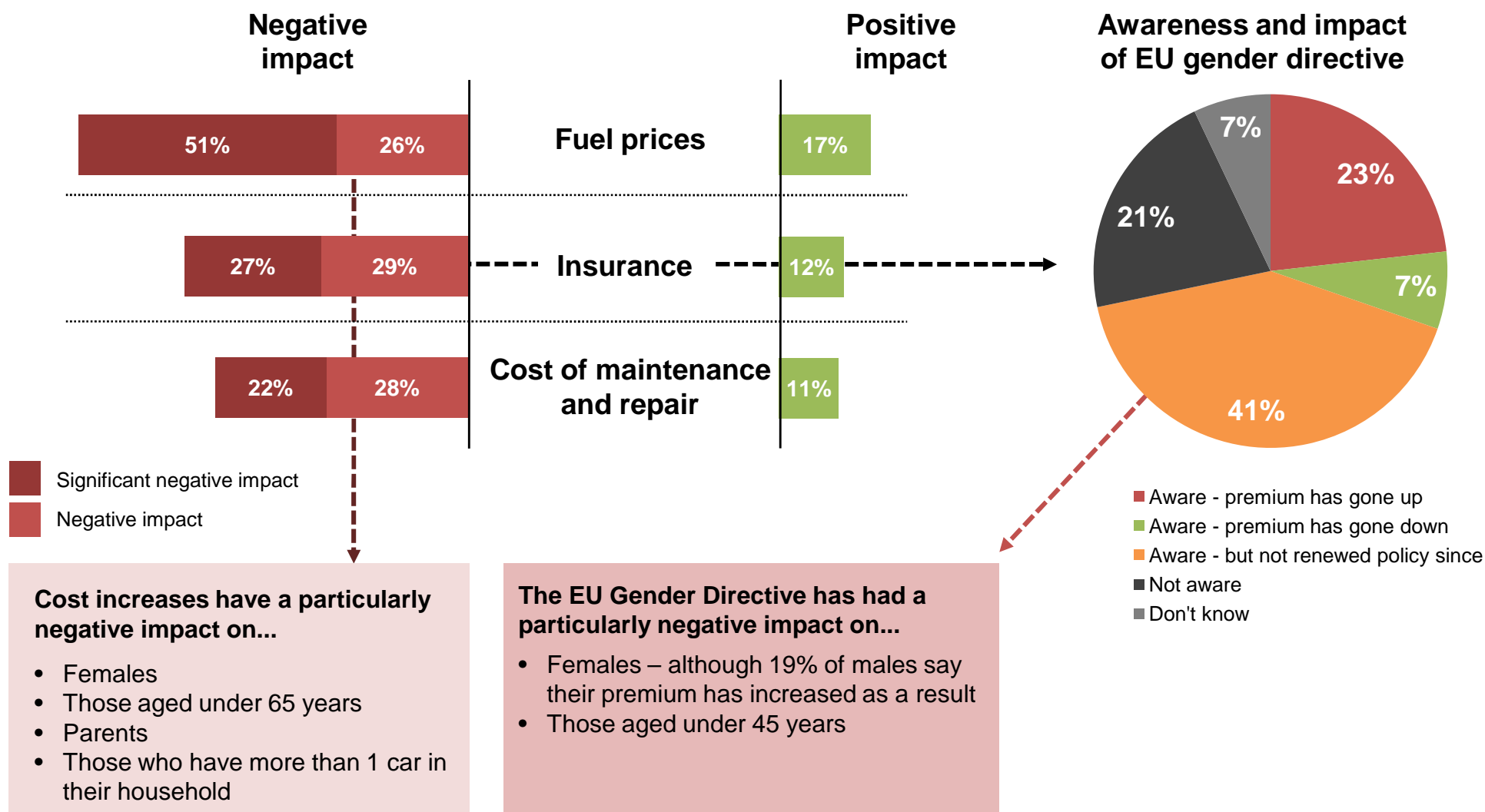
Significantly lower,  
compared to other regions

Total concern 1 <sup>st</sup> – 4 <sup>th</sup> most important concerns	Total	London	South East	South West	West Midlands	East Midlands	East of England	Yorks and Humber	North East	North West	Wales	Scotland
<i>Number of respondents</i>	1542	145	264	146	140	115	149	146	66	178	79	114
The cost of fuel for running a car	63%	47%	64%	62%	70%	62%	65%	68%	69%	66%	65%	62%
Other people driving cars without tax or insurance	37%	32%	37%	32%	40%	45%	42%	36%	37%	41%	43%	30%
The condition and maintenance of roads in the UK	36%	26%	40%	41%	36%	27%	37%	40%	33%	36%	28%	49%
The cost of insuring a car	35%	41%	28%	36%	32%	37%	36%	36%	29%	38%	45%	30%
People talking on phones without hands free whilst driving	33%	34%	36%	40%	35%	37%	35%	28%	28%	28%	36%	30%
Drivers under the influence of drink	32%	33%	31%	31%	29%	33%	29%	31%	40%	32%	33%	31%
People texting or accessing websites on phones whilst driving	29%	27%	30%	32%	27%	24%	30%	30%	31%	27%	38%	26%
People breaking traffic laws (e.g. speeding, running red lights)	21%	23%	22%	21%	19%	27%	23%	17%	21%	17%	19%	20%
Drivers under the influence of drugs	19%	20%	17%	19%	16%	18%	16%	19%	21%	22%	22%	24%
Traffic congestion/ slower journey times	18%	24%	22%	19%	18%	16%	19%	17%	8%	16%	11%	14%
The number of accidents on the road	13%	13%	11%	11%	15%	14%	13%	13%	27%	16%	8%	11%
The rudeness of other drivers on the road	13%	19%	14%	11%	10%	12%	13%	14%	11%	13%	11%	6%
Preparation for and response to adverse weather conditions	11%	11%	9%	9%	14%	8%	7%	12%	9%	12%	7%	15%
Older drivers (those over the age of 70)	8%	6%	8%	8%	5%	11%	8%	10%	12%	8%	3%	14%
Road closures and road works, including utility works	8%	18%	6%	7%	7%	6%	7%	8%	3%	10%	4%	6%
The environmental impact of motoring	7%	6%	7%	8%	8%	5%	5%	7%	5%	4%	9%	10%
Younger drivers (those under the age of 21)	7%	7%	6%	4%	6%	8%	9%	8%	6%	5%	6%	12%

Please note: there may be some unexpected differences in the highlighting above. These can be explained by: a) figures being rounded to the nearest whole number, and/or b) regions with more respondents require less difference to become significant.

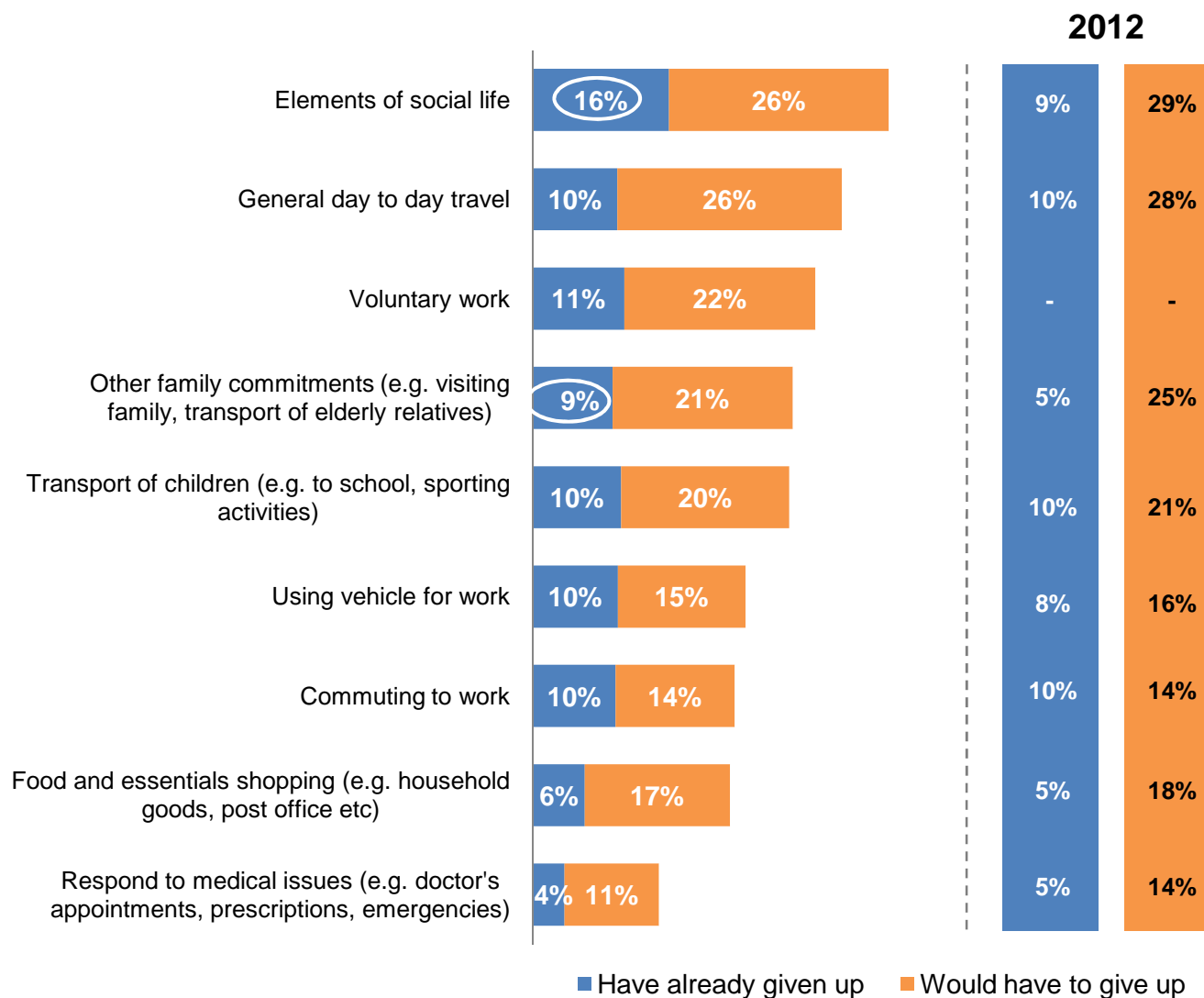
# Impact of rising cost of motoring.

Rising fuel prices have the biggest negative impact on motorists, indicating that the fuel tax freeze is well-aimed. However, some see a positive effect in rising motoring costs, especially those aged 65+ and non-speeders.



# Sacrifices made due to rising motoring costs.

People are more likely to give up elements of their social life as a result of rising motoring costs – and significantly more so than last year. This is particularly the case for people who are C2DE and those who live rurally.



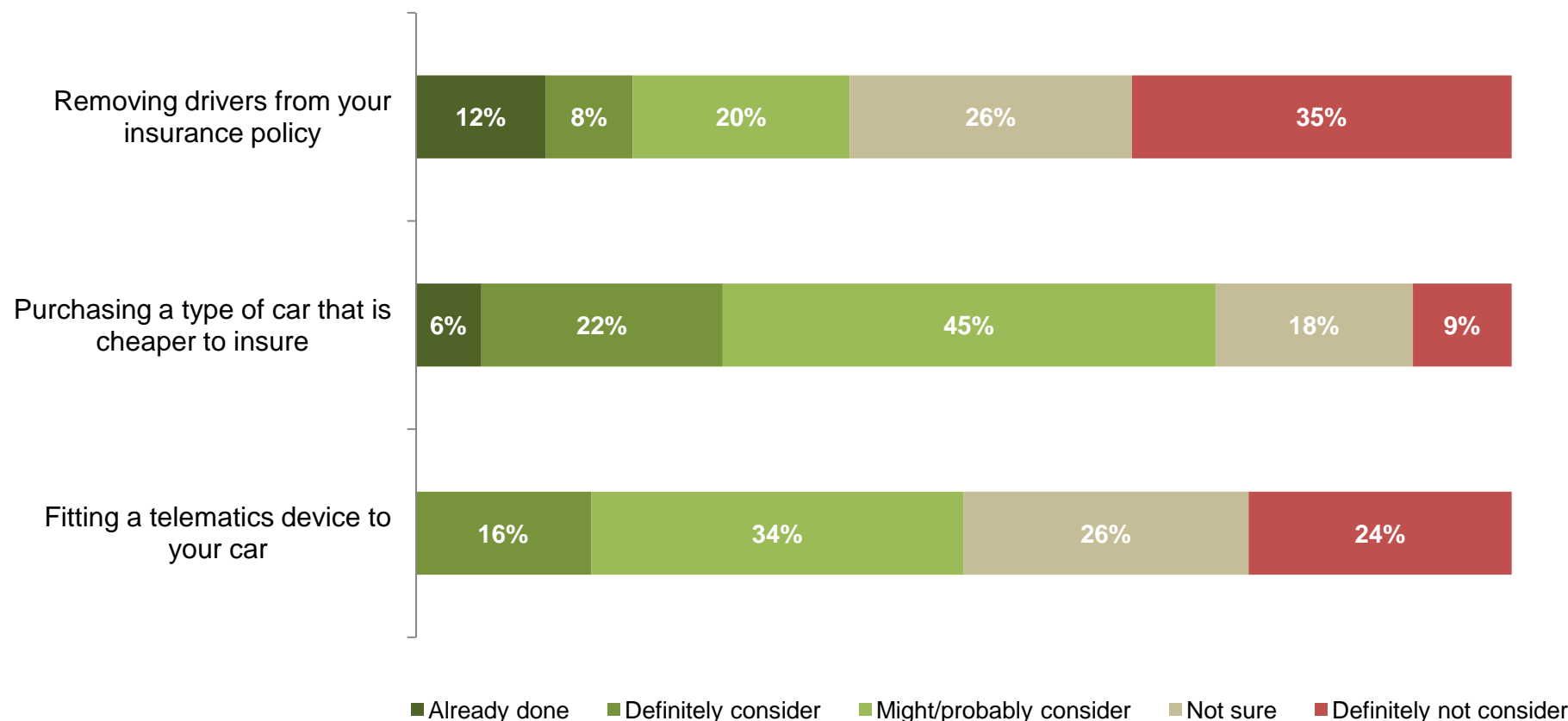
**54%**

say that they would have a fuller social life if fuel was more affordable, rising to **77%** for 17-24 year olds and **62%** for C2DEs

# Approaches to reducing insurance premiums.

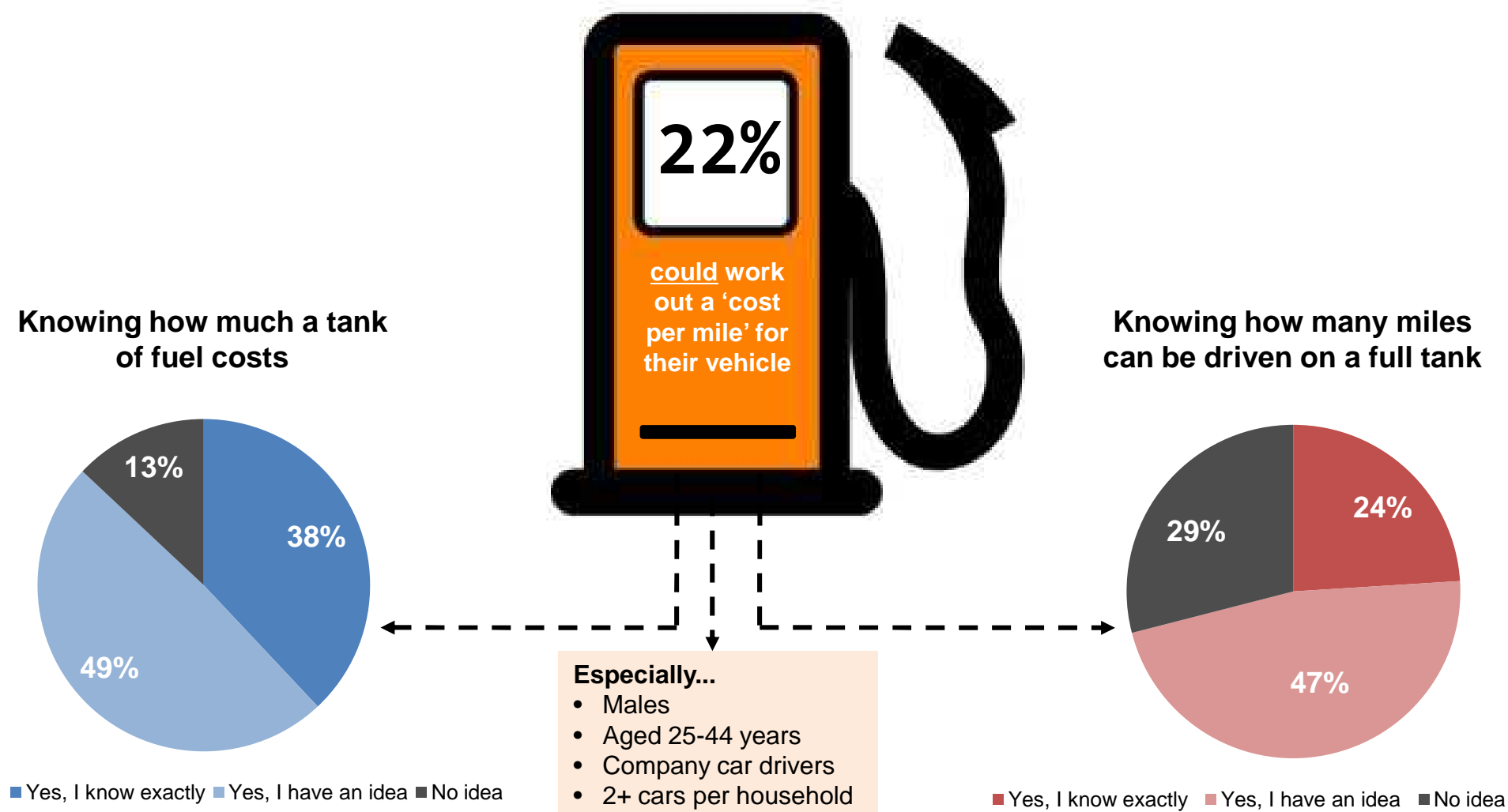
More than 1 in 10 have already removed other drivers from their policy to lower the cost – especially low mileage drivers and those aged 65+.

Recall: 23% have seen their premiums go up due to the EU Gender Directive



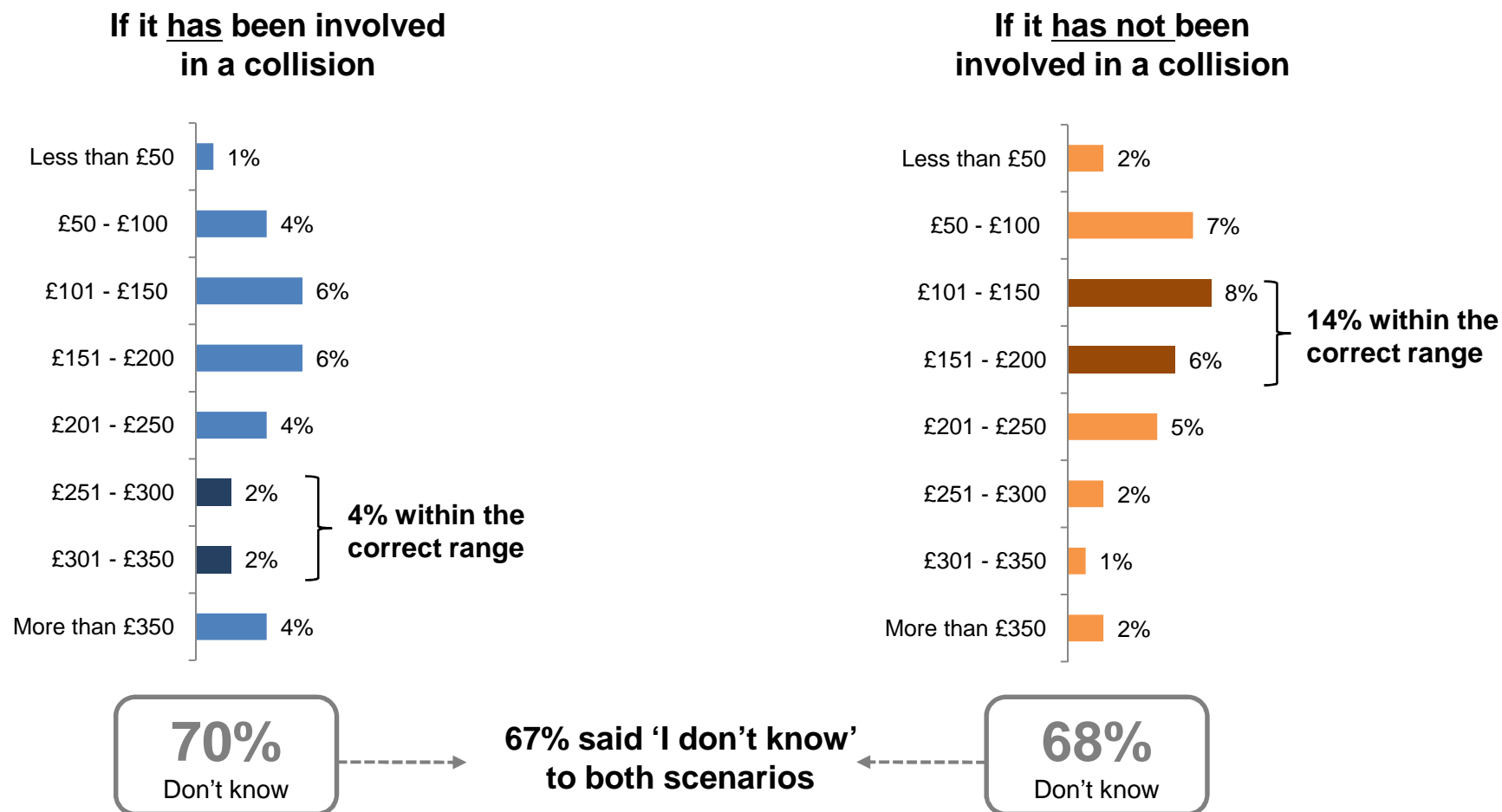
# Knowing the cost of driving.

Almost all have an idea of what a tank of fuel costs but one in three don't know how far they can travel on it. Only one-fifth have a firm understanding of both.



# Knowing the value of breakdown cover.

Two-thirds of drivers cannot make a guess at how much they would have to have to pay for their car to be towed if they aren't covered.



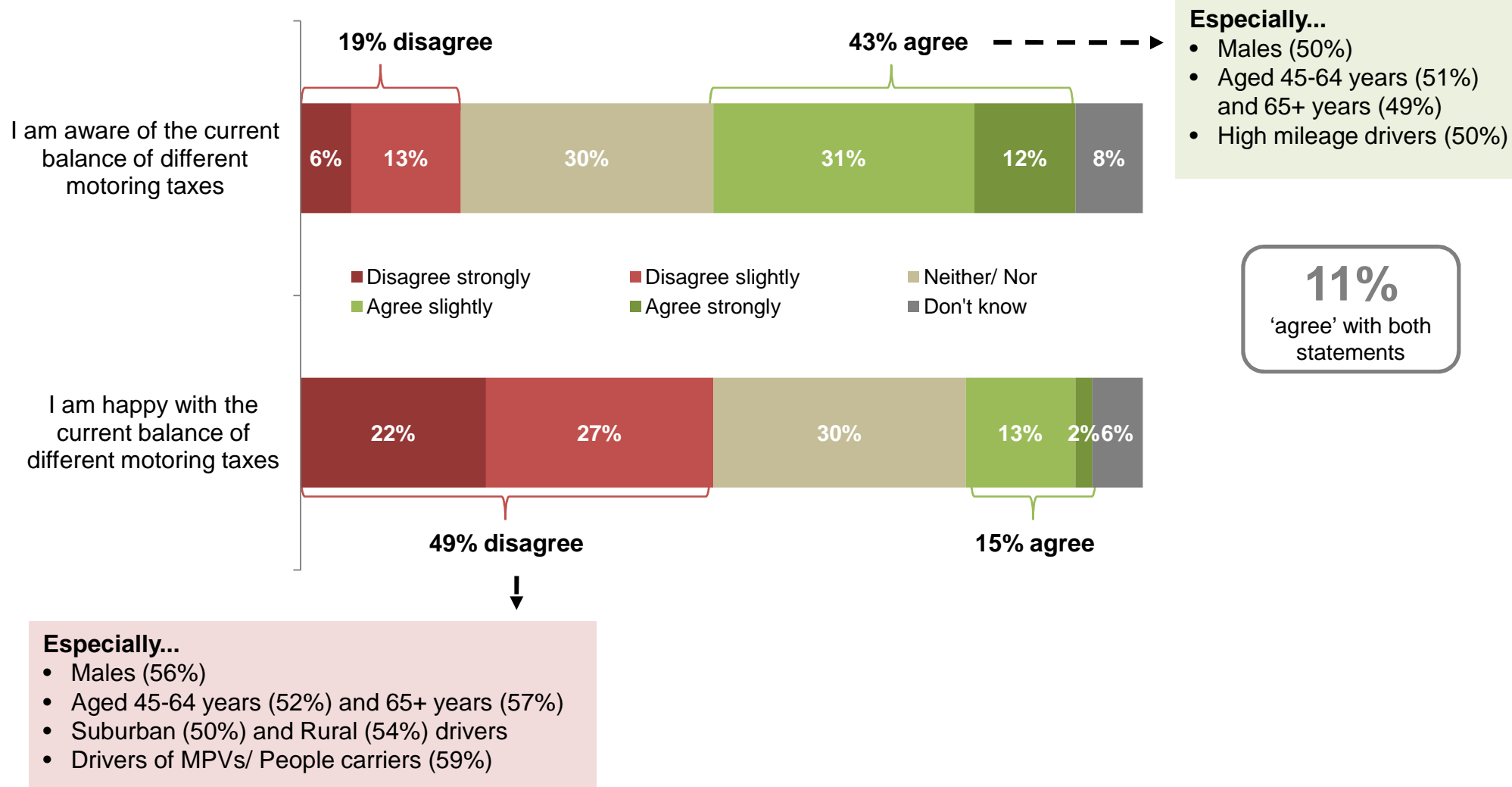


## ii. Motoring taxes.



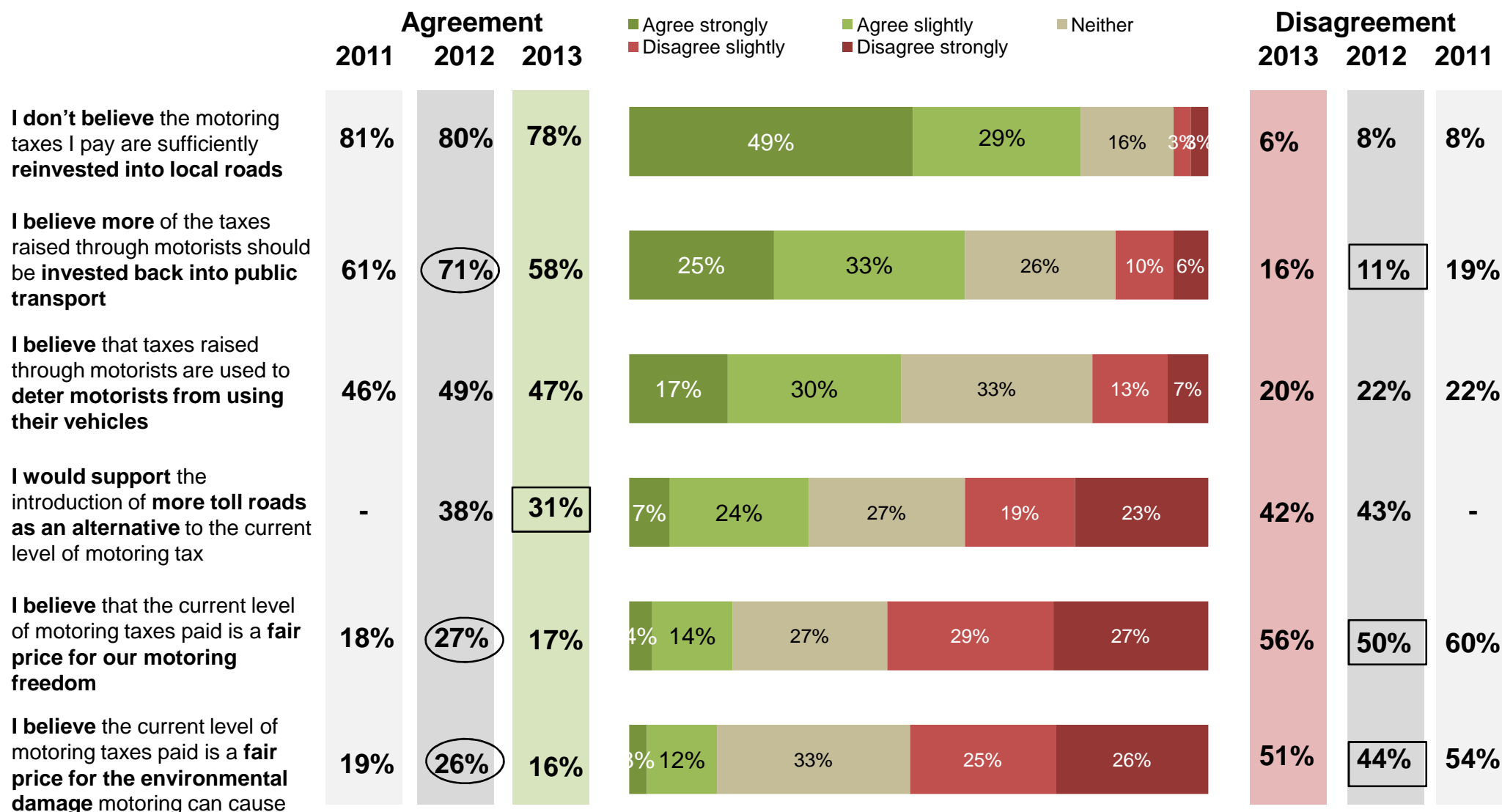
# Knowing about the balance of motoring taxes.

Only 1 in 10 are both aware of, and happy with, the balance of motoring taxes. Those happy with the current balance are more likely to have an alternative to driving, e.g. living in the city centre and/or regularly using public transport.



# Spending motoring taxes.

Reinvestment of taxes into local roads continues to be a priority. 2012 saw a peak in those believing taxes should be invested into public transport and also more feeling that the taxes paid are a fair price for motoring freedom and environmental damage. In 2013 these numbers are on par with 2011.



# Exploring pay per mile road charges.

People feel that drivers who contribute most to environmental pollution and traffic should be penalised with higher road charges.

**33%**

would support the principle of paying per mile as an alternative to the current level of motoring tax

## Especially...

- Males
- Those aged 45+
- Low/Medium mileage drivers
- Those who live in the suburbs, in households with no children
- Those considering a green car

## Road charges should...

be higher for the most polluting vehicles and lower for the cleanest



be higher for roads and times with the greatest congestion



be restricted to motorways



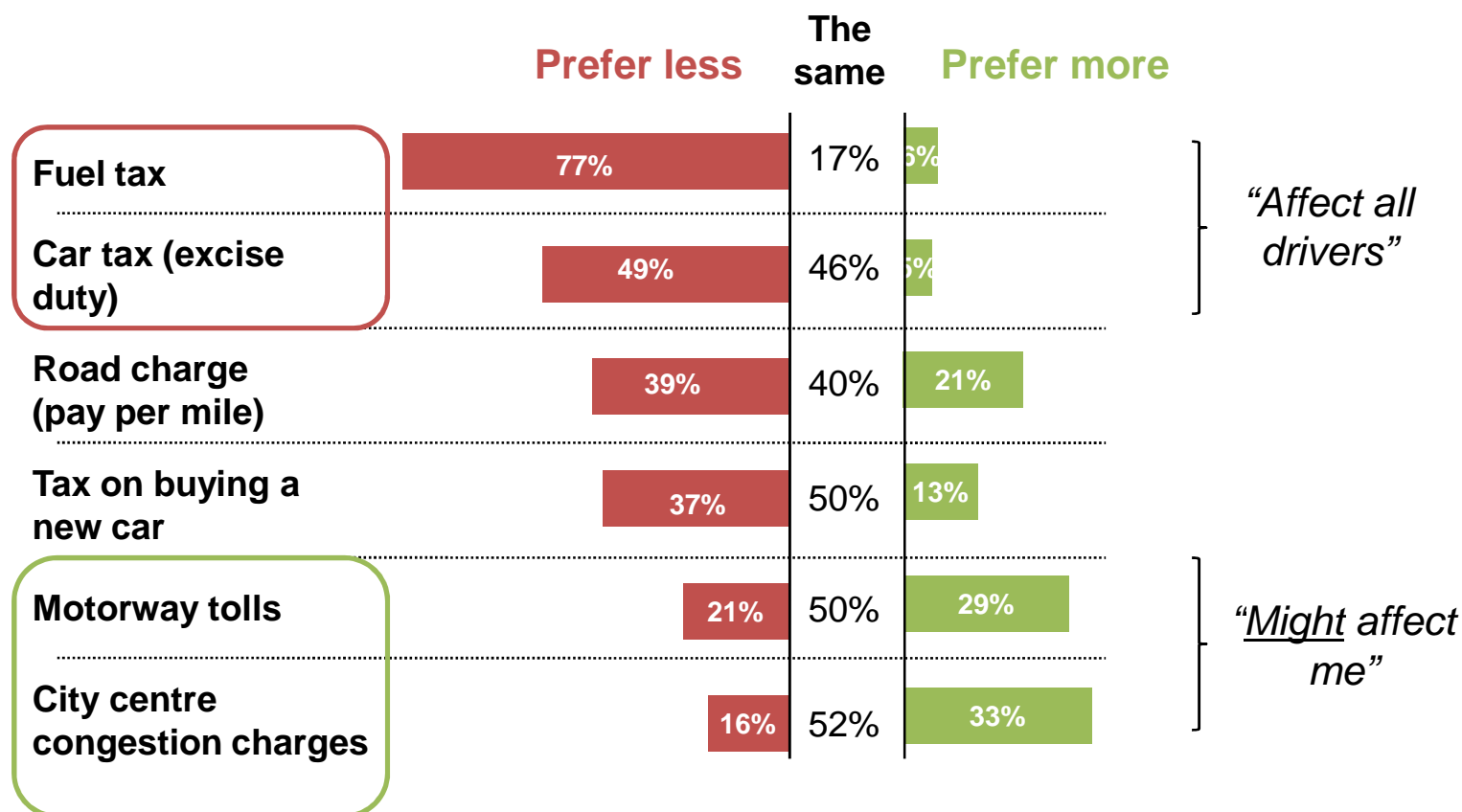
be restricted to new roads



■ Disagree strongly ■ Disagree slightly ■ Neither/ Nor ■ Agree slightly ■ Agree strongly

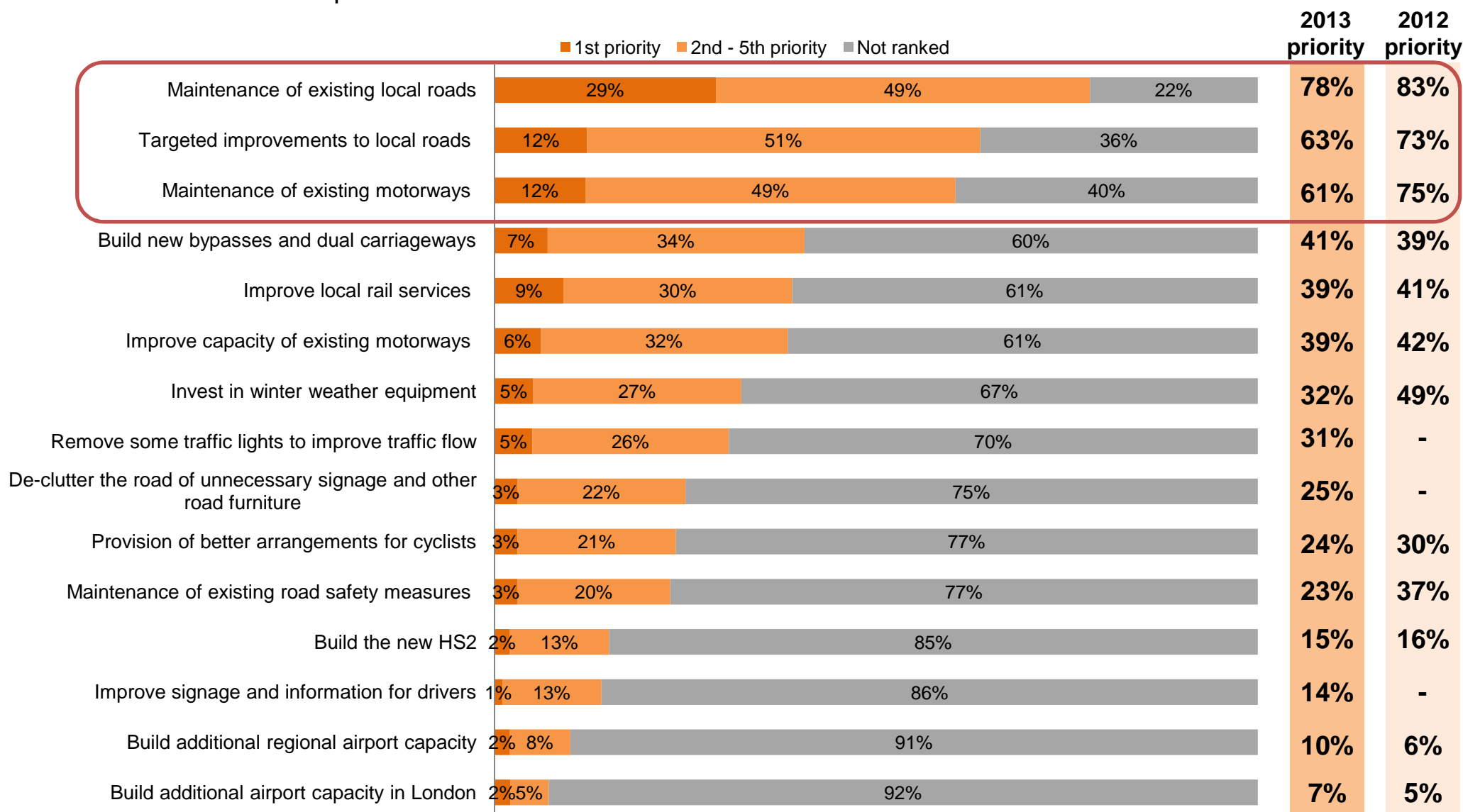
# Changing the balance of motoring taxes.

Again, motorists prefer to see motoring taxes weighted against 'optional' driving – such as using motorways or driving in the city centre – whereas most agree that taxes affecting all drivers should be lowered.



# Priorities for transport investment.

As in previous years, investment in local roads continues to be a priority for motorists – particularly those living in rural areas. Direct comparisons cannot be made between 2012 and 2013 due to the addition of new codes.

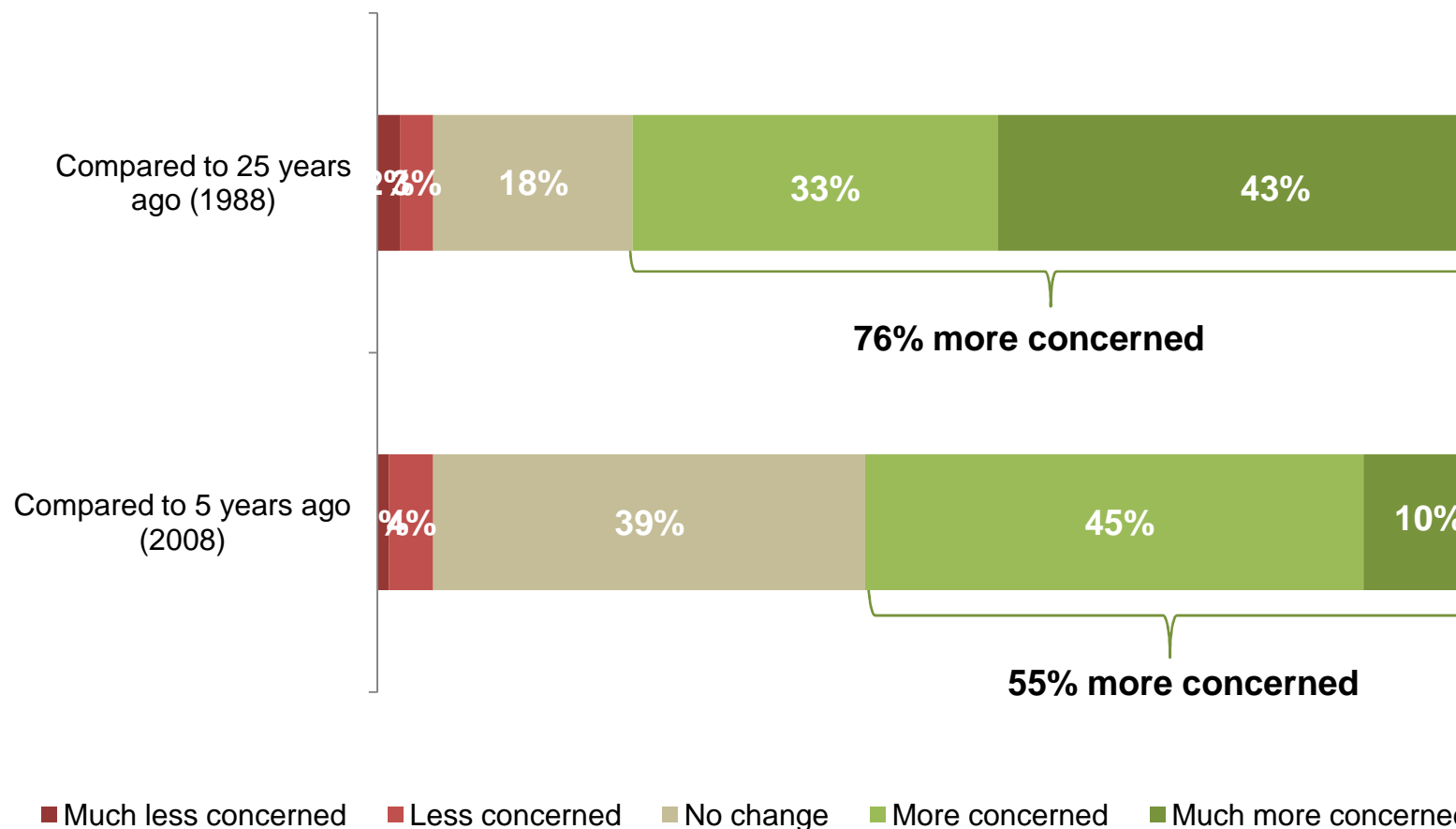




# Green driving.

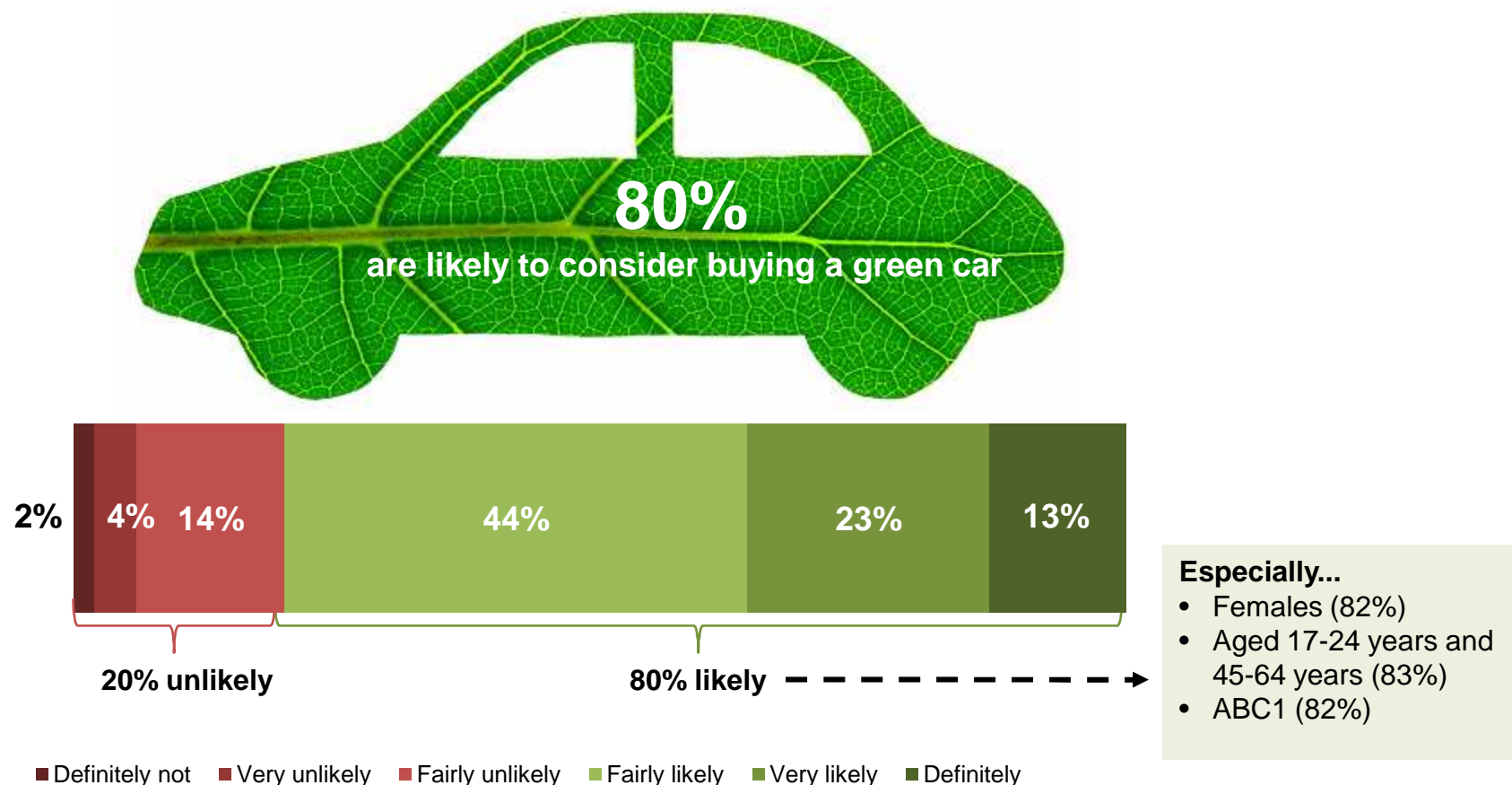
# Motorists' environmental concerns.

Motorists maintain that they are increasingly concerned about the environment, even compared to 5 years ago.



# Consideration of purchasing a green car.

Already identified as an emerging motoring trend for the next 25 years, environmental considerations are likely to play at least a nominal role in the majority of future vehicle purchases.

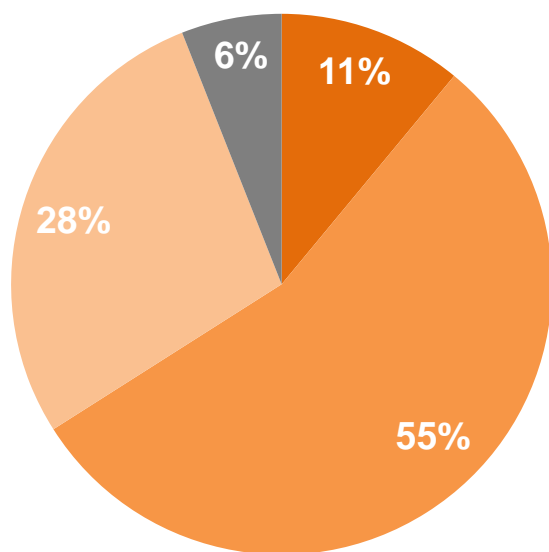




# Fuel economy.

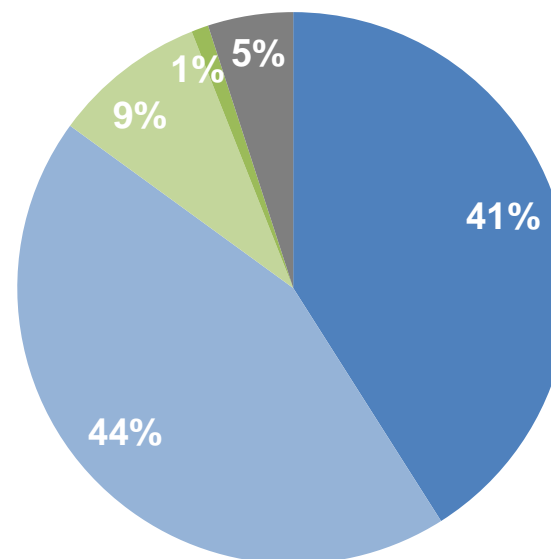
Whilst fuel economy was a factor in the majority of last vehicle purchases, for 8 in 10 of these cases, the sole or primary motivation was the financial implication.

**Importance of fuel economy in previous vehicle purchase**



- Most important factor
- Important factor amongst others
- Not an important factor but was looked at
- Not important at all

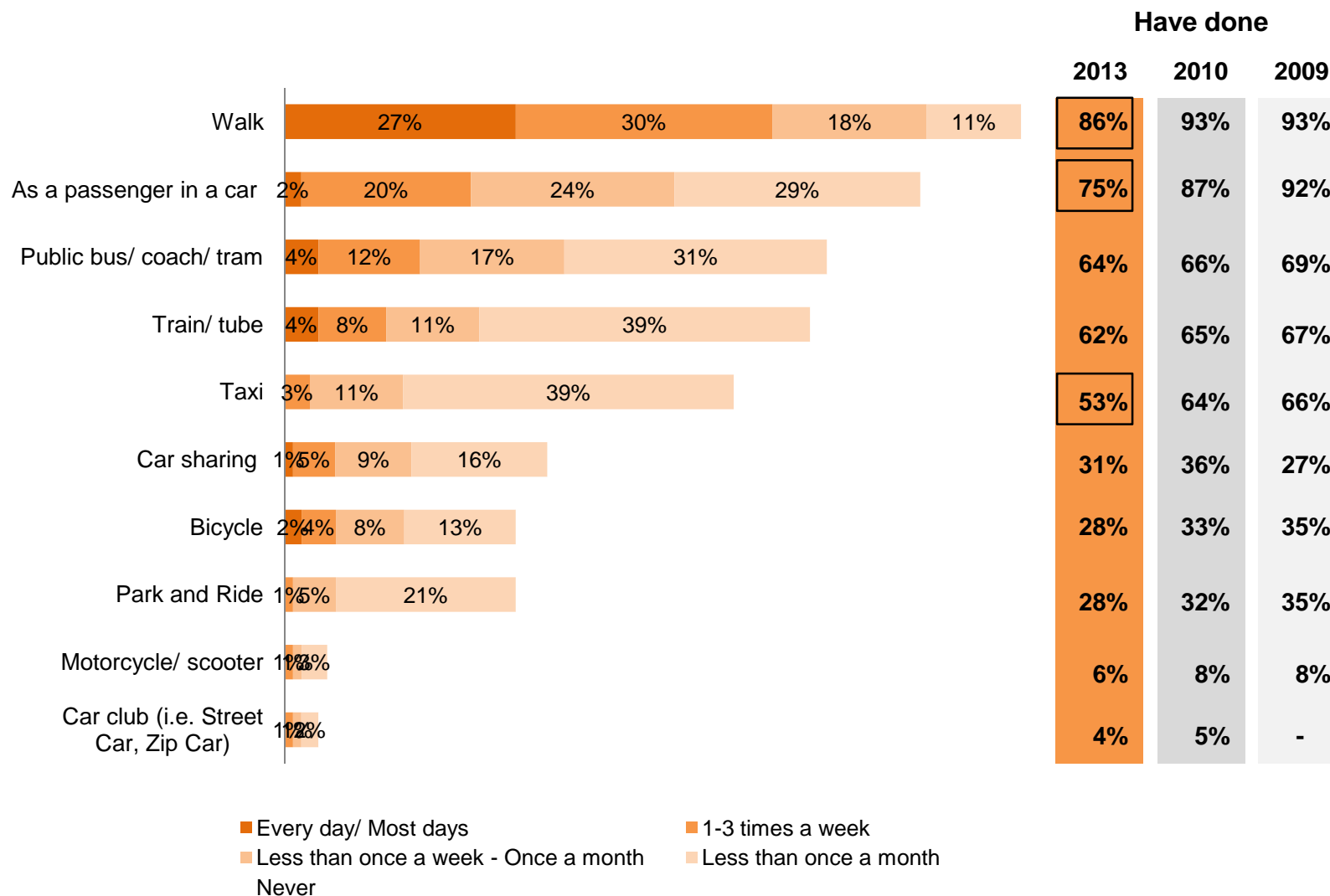
**Reasons why fuel economy was important**



- Financial reasons only
- Financial reasons but I did think about the environment
- Environmental reasons but I did think about the financial implications
- Environmental reasons only
- None of the above

# Alternatives to driving.

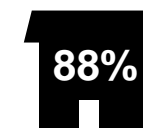
Walking continues to be the most popular alternative to driving, although this has dropped in recent years. Londoners and those aged under 25 are particularly likely to travel by foot frequently.



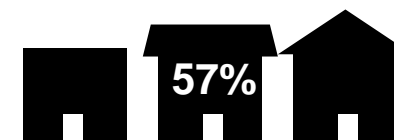
How feasible is it to leave the car at home?



Can access public transportation



Can walk to convenience store or newsagent



Can walk to a high street with a range of shops



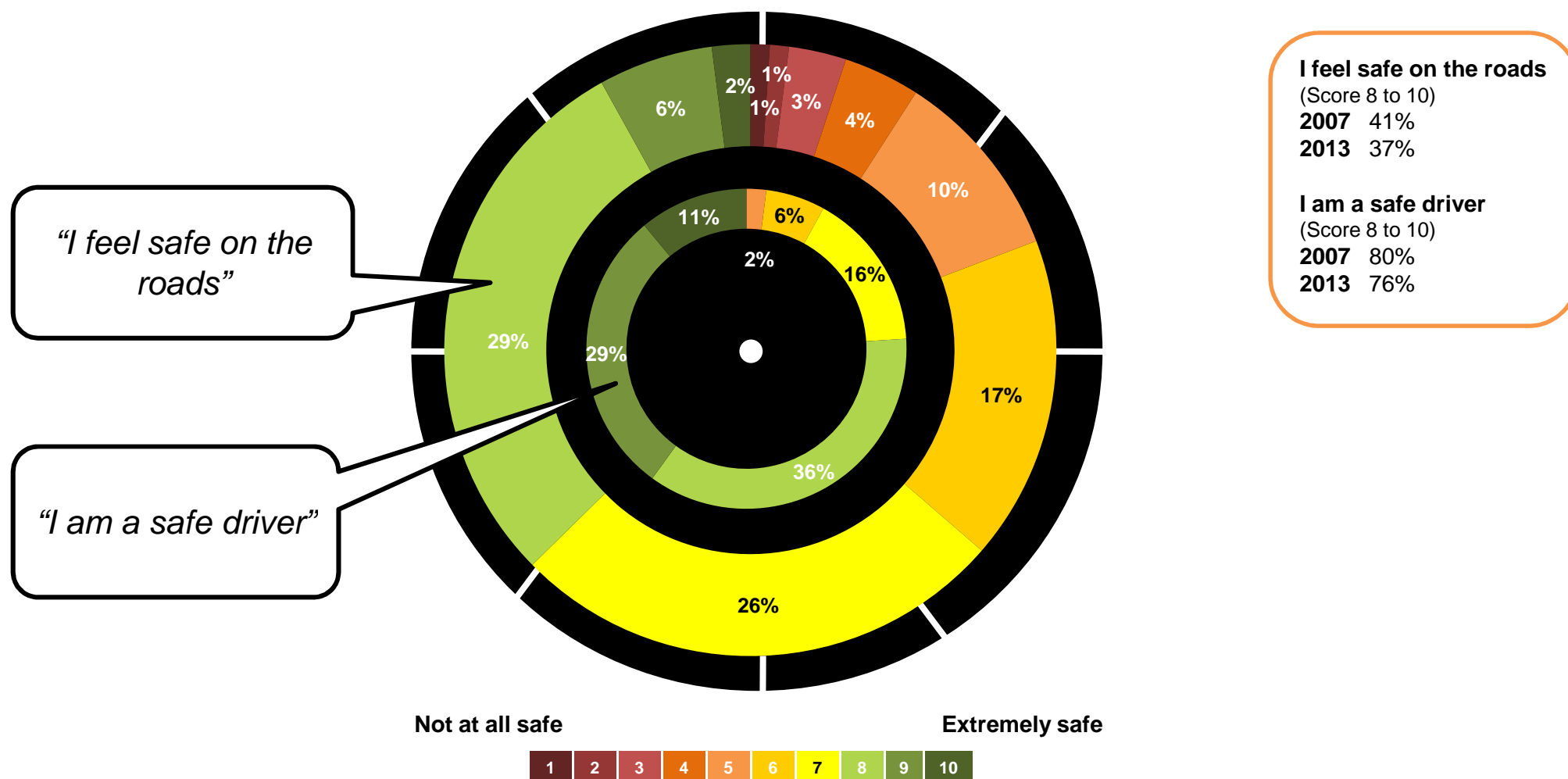
# Safety and technology.



## i. Motoring safety.

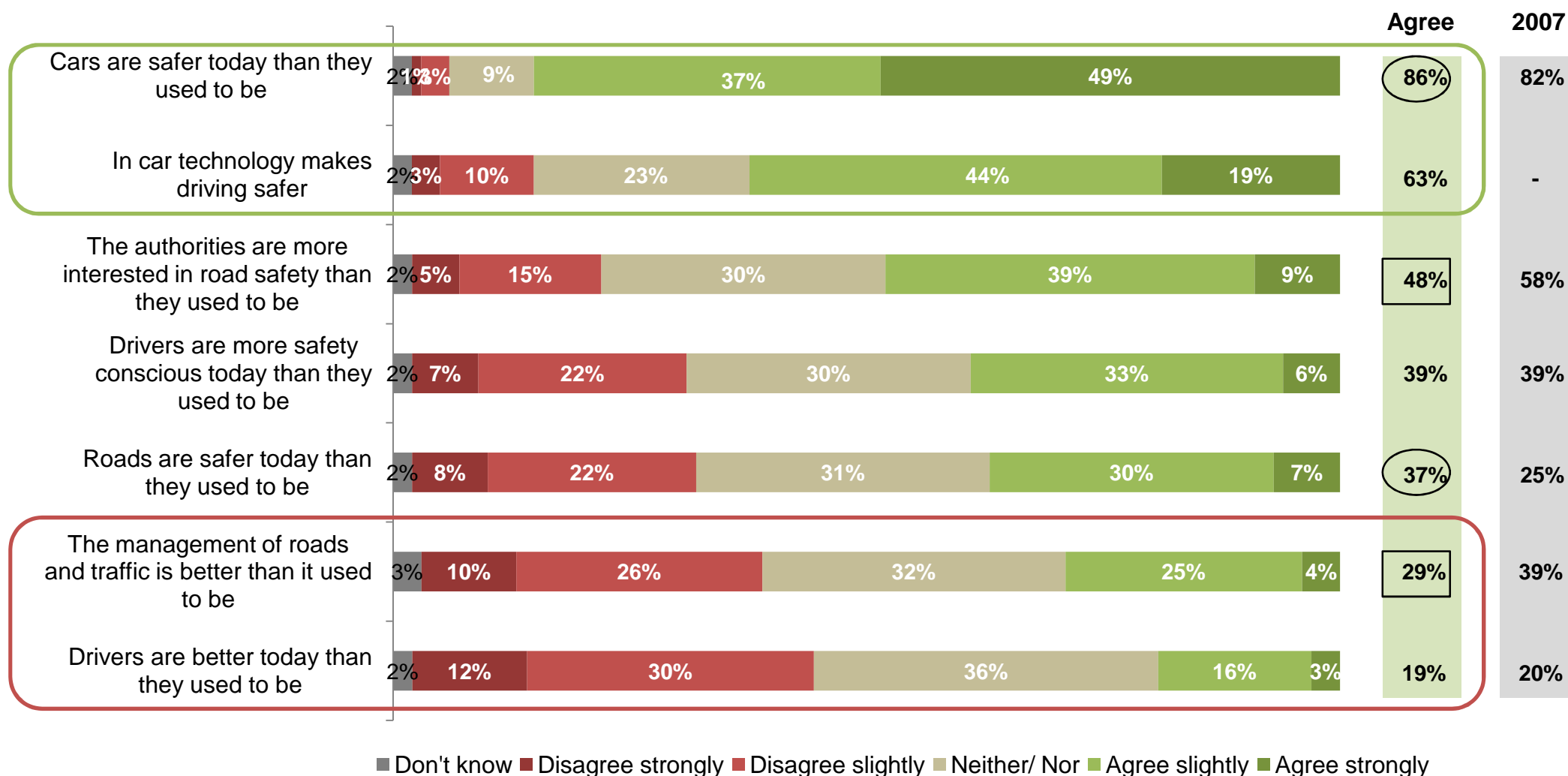
# Perceptions of safe driving.

Drivers today are most likely to rate the safety of UK roads a 'middle-of-the road' 5-7 out of 10; however they are more complimentary of their own driving, rating it at least 8 out of 10 in three-quarters of cases.



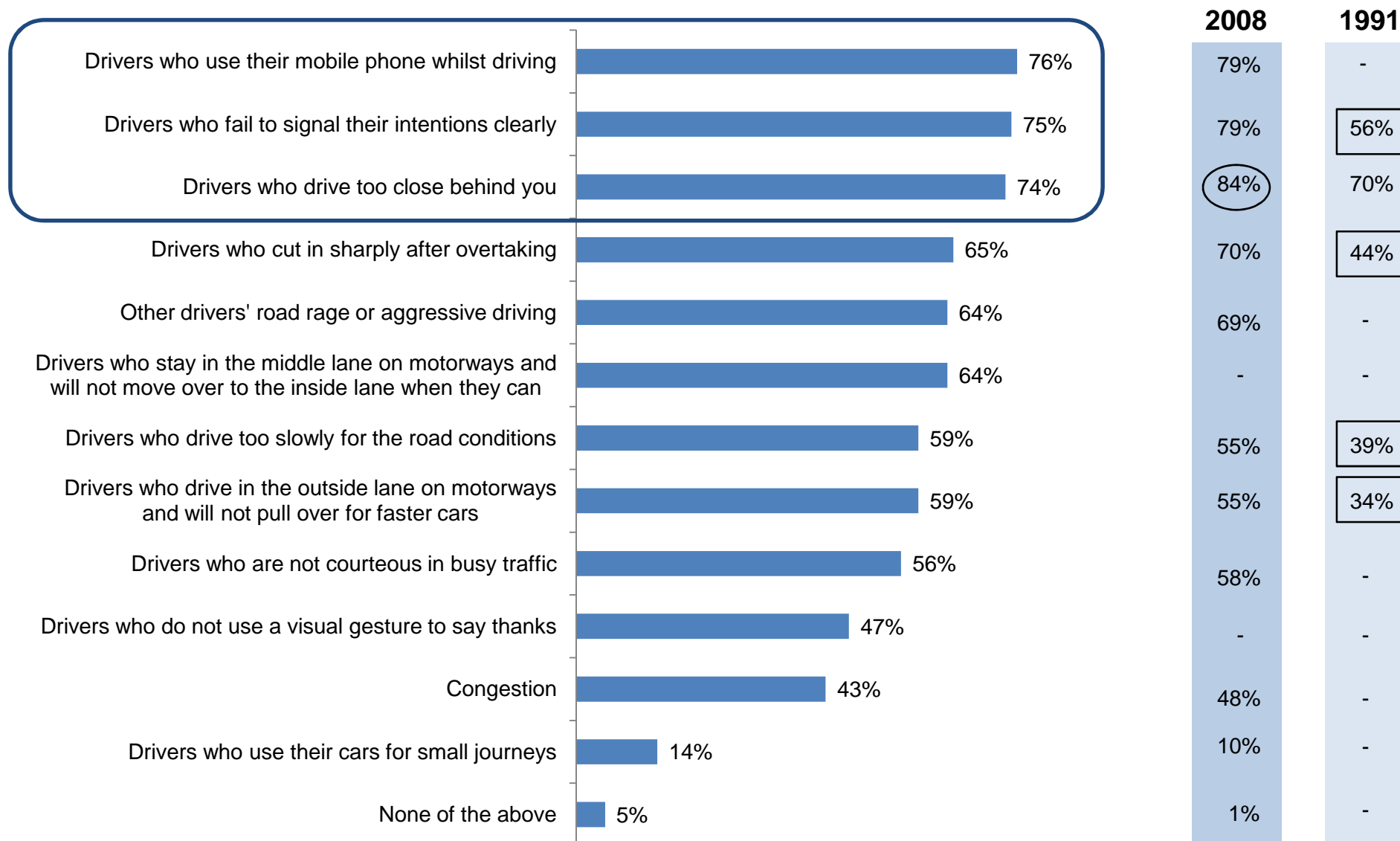
# Improvements in road safety.

Whilst technology is widely acknowledged to have improved road safety, few believe that drivers themselves are safer than they used to be.



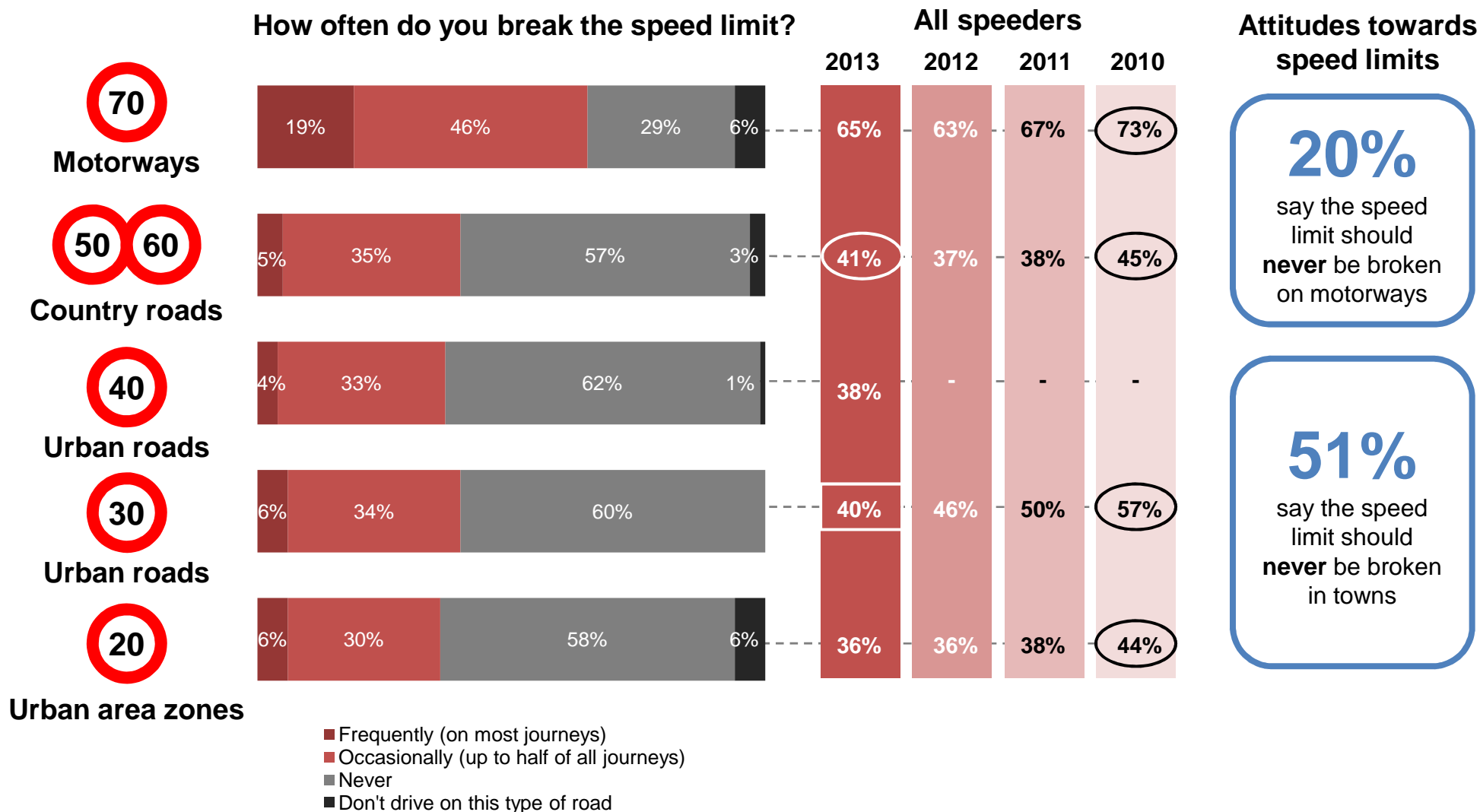
# Sources of stress and anger when driving.

The most significant 'stress points' relate to the behaviour of other drivers, which are at best careless, and at worst dangerous. Whilst technology has been praised for improving safety, here it is the biggest source of stress.



# Breaking the speed limit.

Whilst the incidence of speeding on motorways and country roads remains the same as last year, fewer drivers are speeding on 30mph roads than in 2012 but more are speeding on country roads.

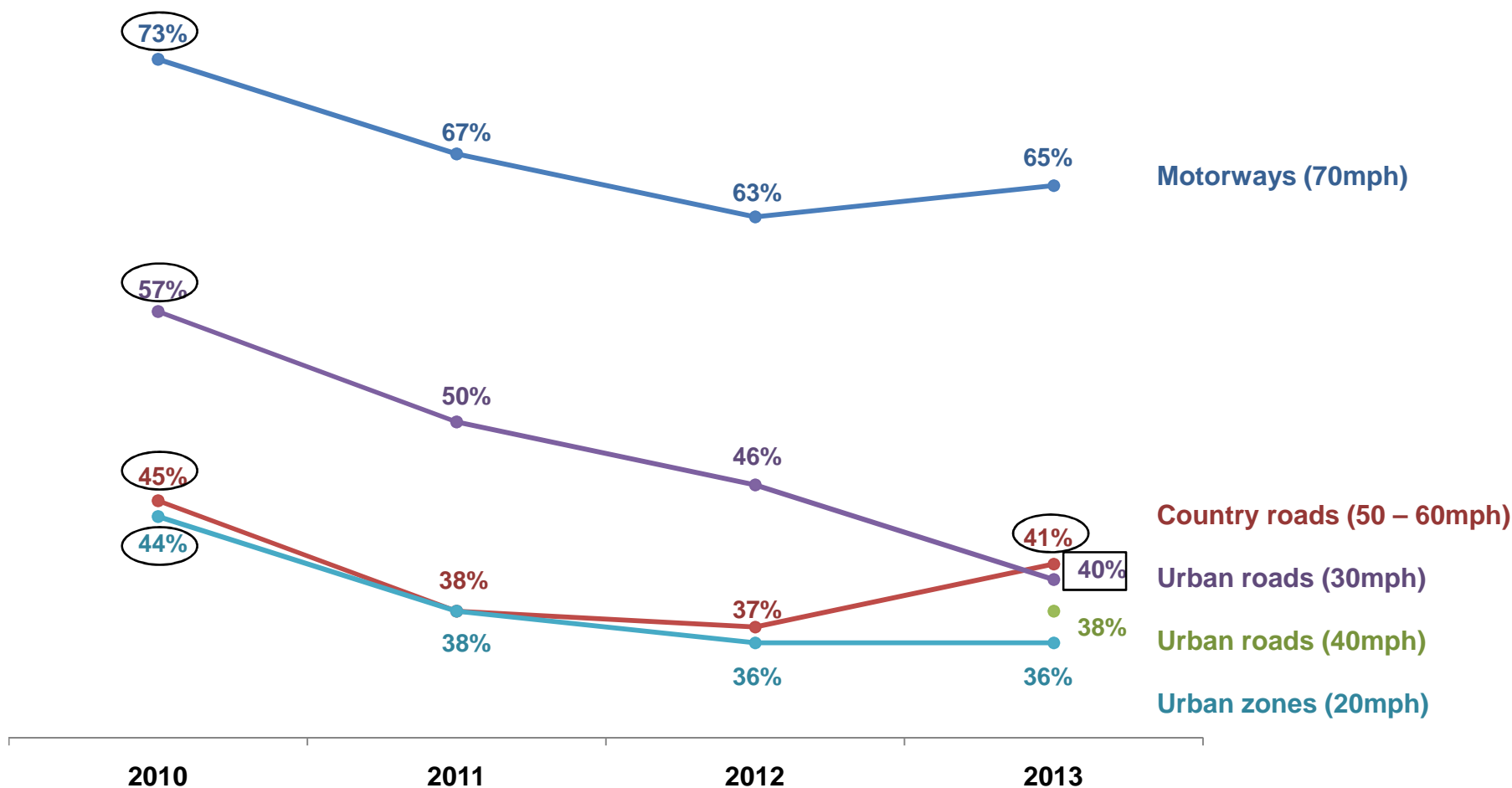




# Prevalence of speeding: 2010 – 2013.

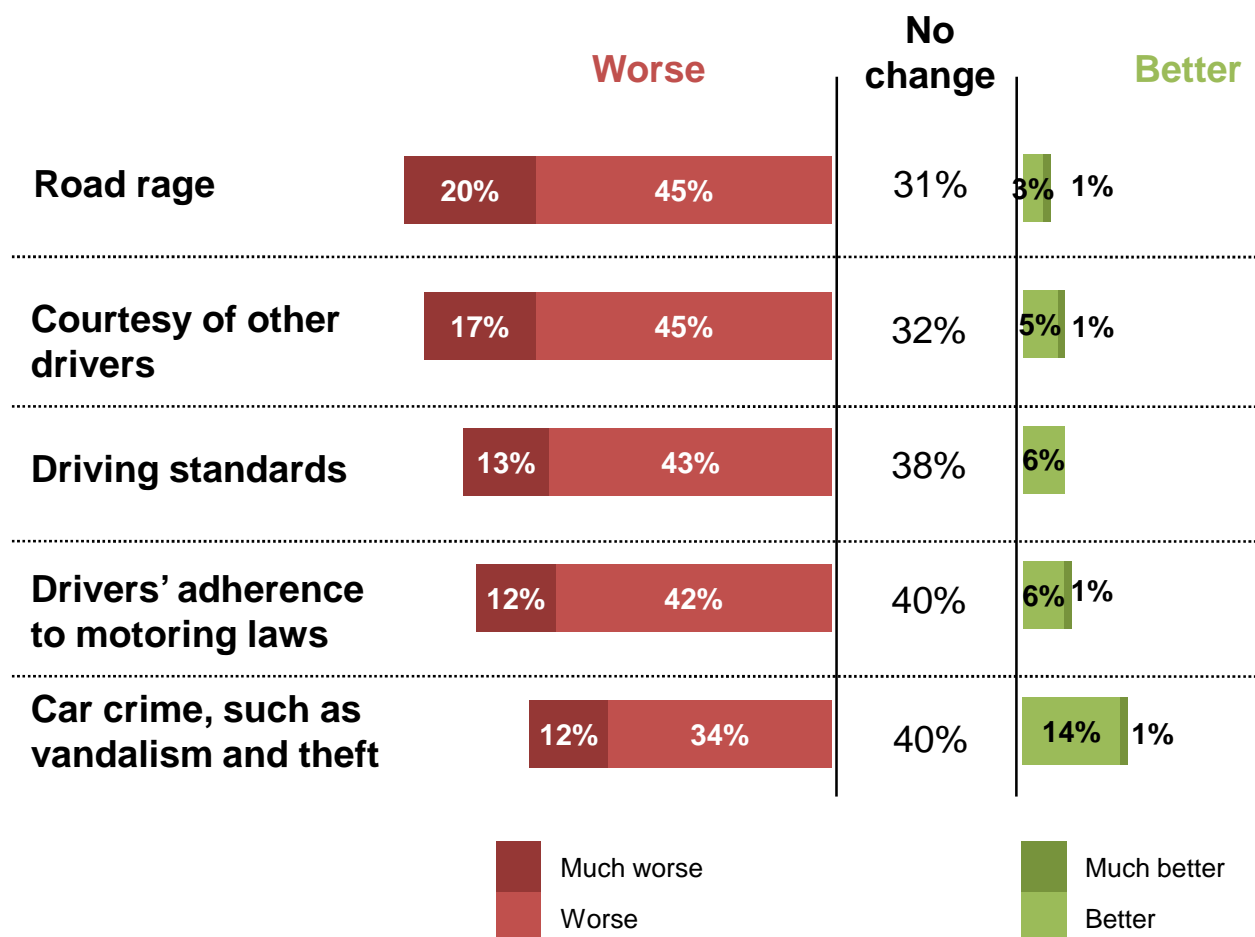
Speeding has dropped across the board since 2010, although speeding on country roads has increased significantly since last year. People tend to be more likely to speed on roads where the speed limit is higher.

Number of frequent and occasional speeders,  
by road type and year



# Motoring changes in the last 5 years.

Most agree that issues such as road rage and the courtesy of other drivers are getting worse rather than better, especially for people living in suburban and rural areas. However, for 1 in 3 people, there has been little change.

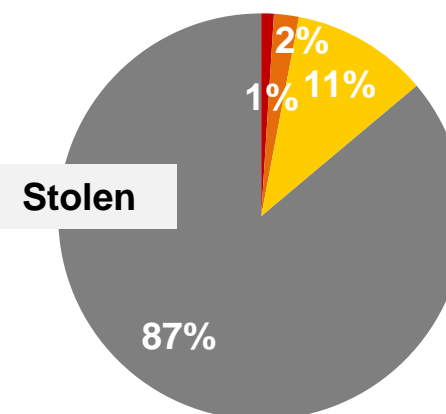
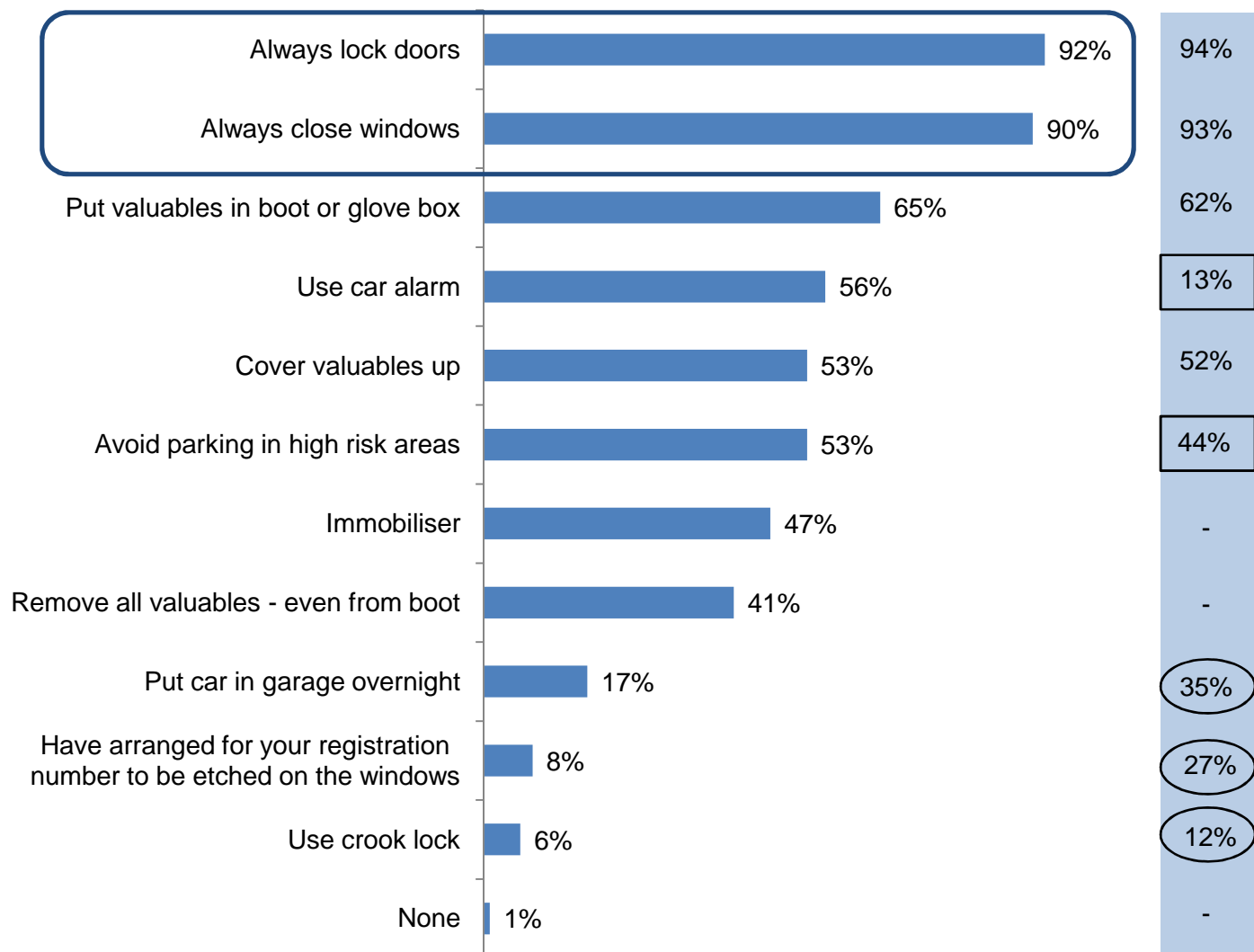


Vehicle has been...

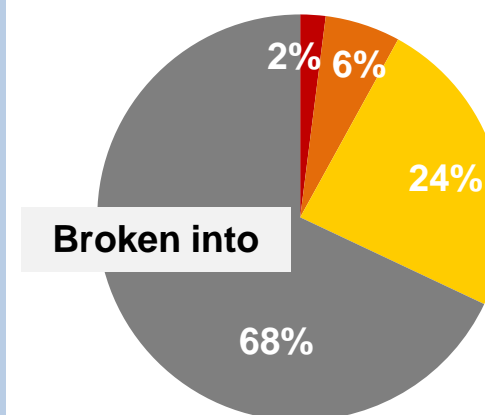
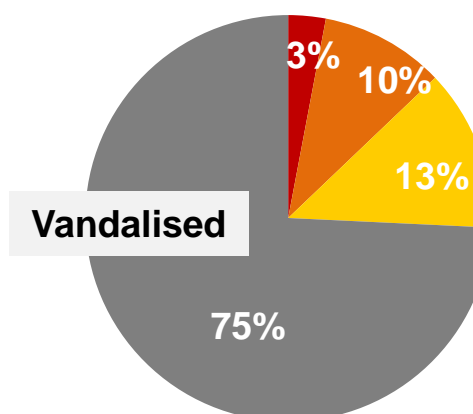
# Car crime and prevention.

3 in 10 motorists say their car has been broken into in the past, and nearly all now take precautions against car crime by always locking windows and doors.

## Precautions against crime



In 1989 4% had had their car stolen in the last 3 years



In 1989 6% had had their car stereo stolen in the last 3 years

■ Last 12 mths ■ 1-5 yrs ago ■ 6+ yrs ago ■ Never



## ii. Motoring technology.

# In-car technology owned.

9 in 10 have adopted some form of new technology in their car. Those less likely to have any devices are low mileage drivers and C2DE.

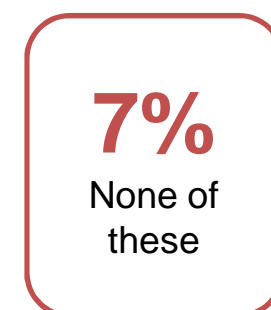


Age of car →

<4 yrs	5-10 yrs	10+ yrs
91%	90%	77%

<4 yrs	5-10 yrs	10+ yrs
52%	39%	36%

<4 yrs	5-10 yrs	10+ yrs
39%	8%	3%



<4 yrs	5-10 yrs	10+ yrs
30%	11%	12%

<4 yrs	5-10 yrs	10+ yrs
17%	12%	8%

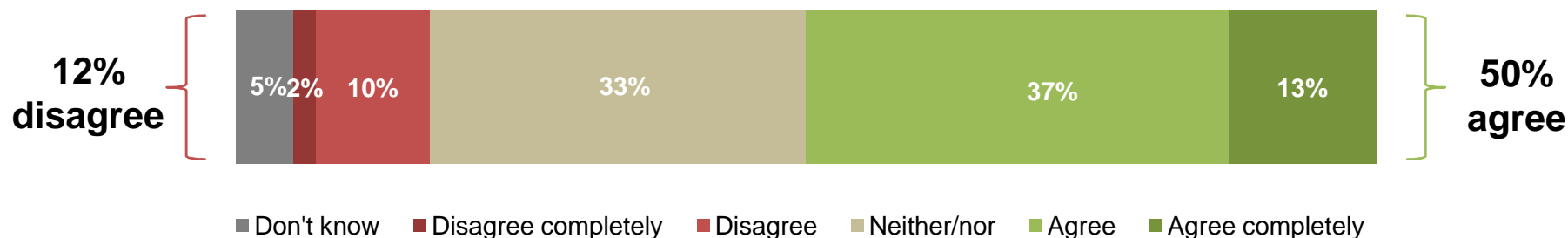
<4 yrs	5-10 yrs	10+ yrs
13%	14%	13%

<4 yrs	5-10 yrs	10+ yrs
3%	6%	18%

# In-car technology and safer driving.

Half of motorists believe that in-car technology does not make people into safer drivers.

## “In-car technology makes people LESS SAFE drivers”



### Tech advocates tend to be...

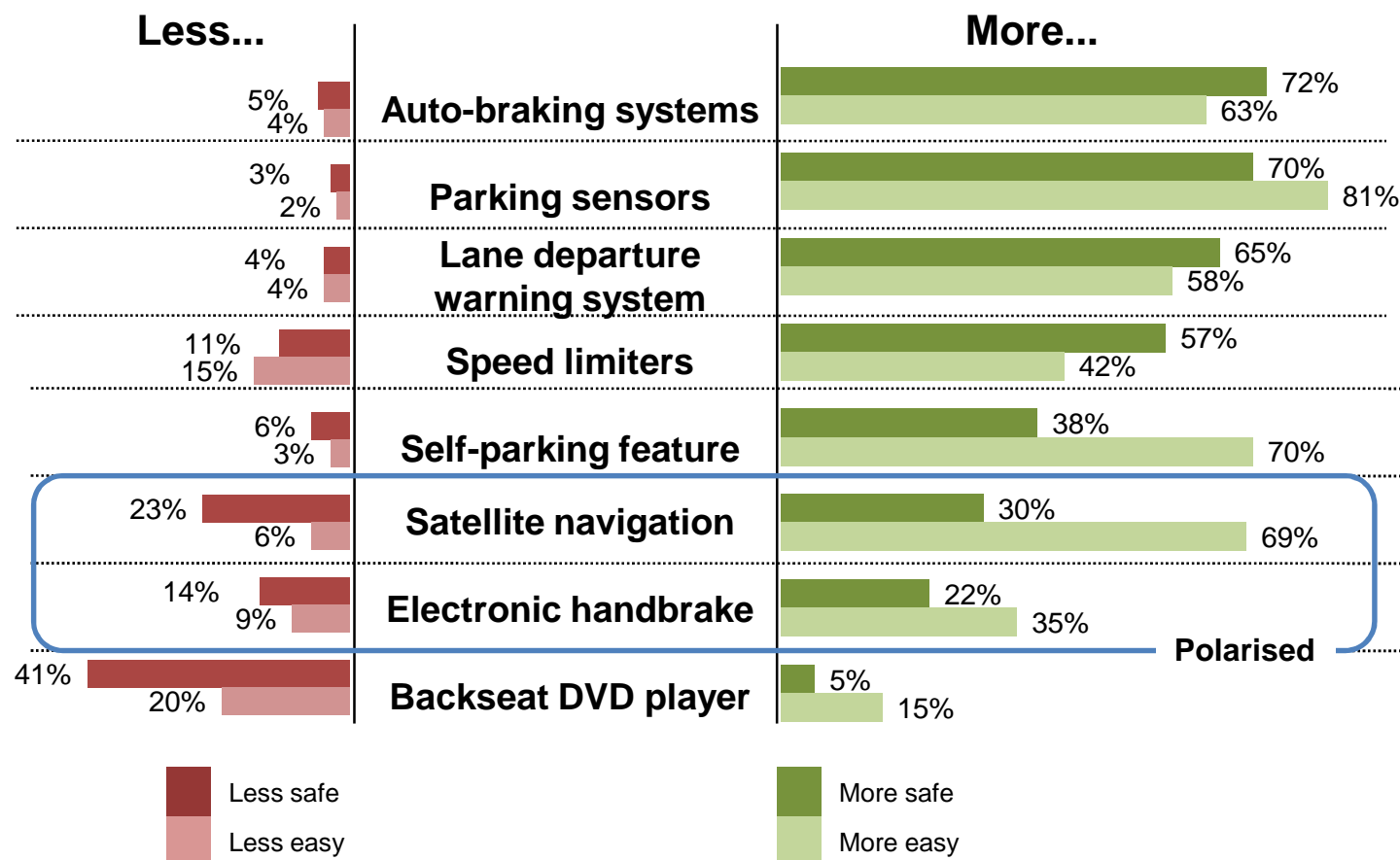
- Male (16%)
- Rural (15%)
- MPV/ People Carrier drivers (19%)

### Tech sceptics tend to be...

- Parents (51%)
- From the W. Midlands (55%) or Wales (57%)

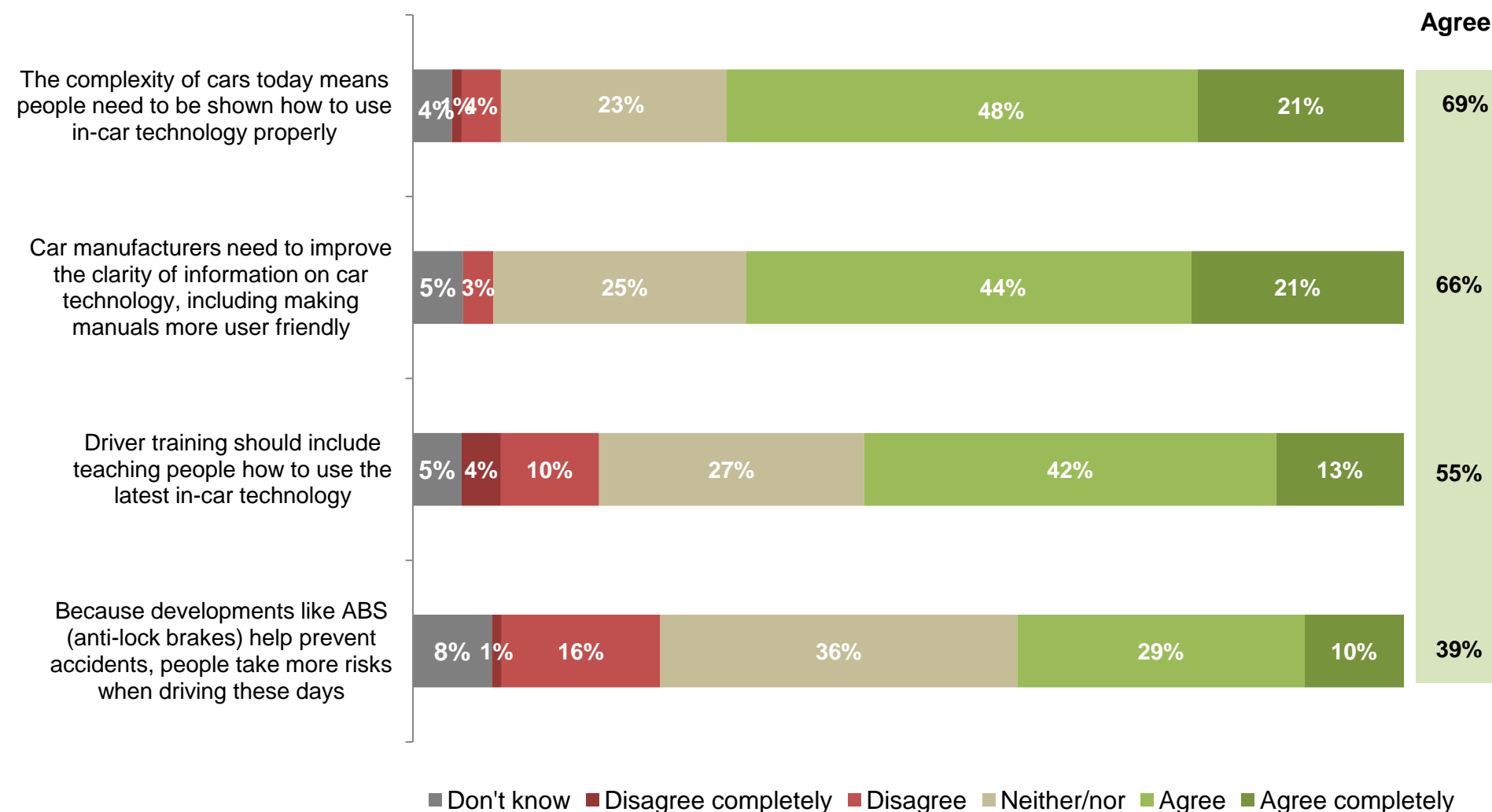
# Impact of technology on safety and ease.

Nearly all features have made motoring easier and safer. However, SatNav and electronic handbrakes attract polarised views on safety, and backseat DVD players are largely seen as making motoring less safe.



# Attitudes towards in-car technology.

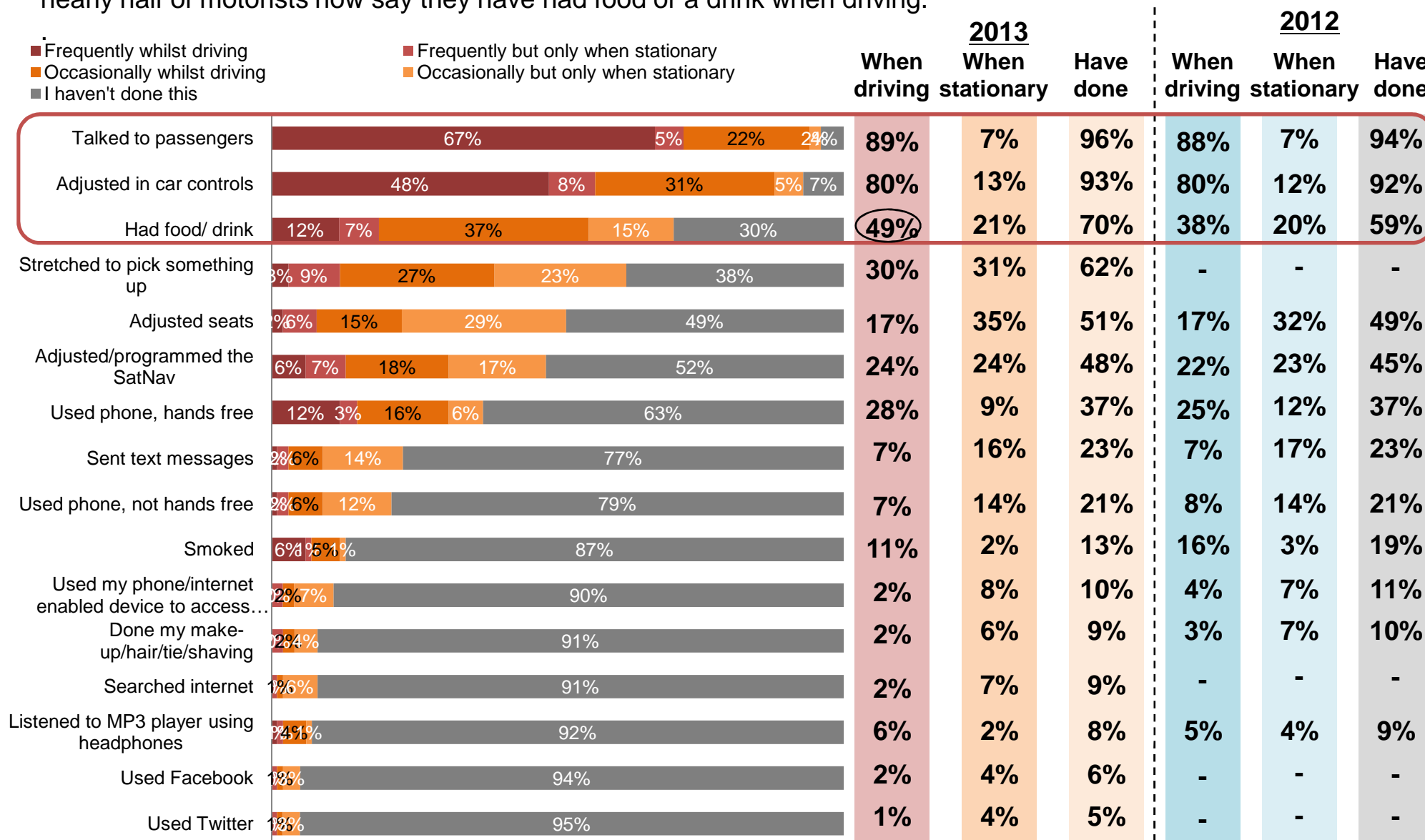
It is clear that technology alone does not make motoring safer – it should be coupled with up-to-date training and product manuals to ensure that drivers can make the most of the latest advances.





# Driving distractions.

Showing few changes from last year, motorists do many things that may distract them whilst driving. One increase: nearly half of motorists now say they have had food or a drink when driving.



# Mobile phone behaviours.

8 in 10 motorists keep their mobile phones on when driving. Those most likely to turn it off are aged over 65, C2DE and low-medium mileage drivers.

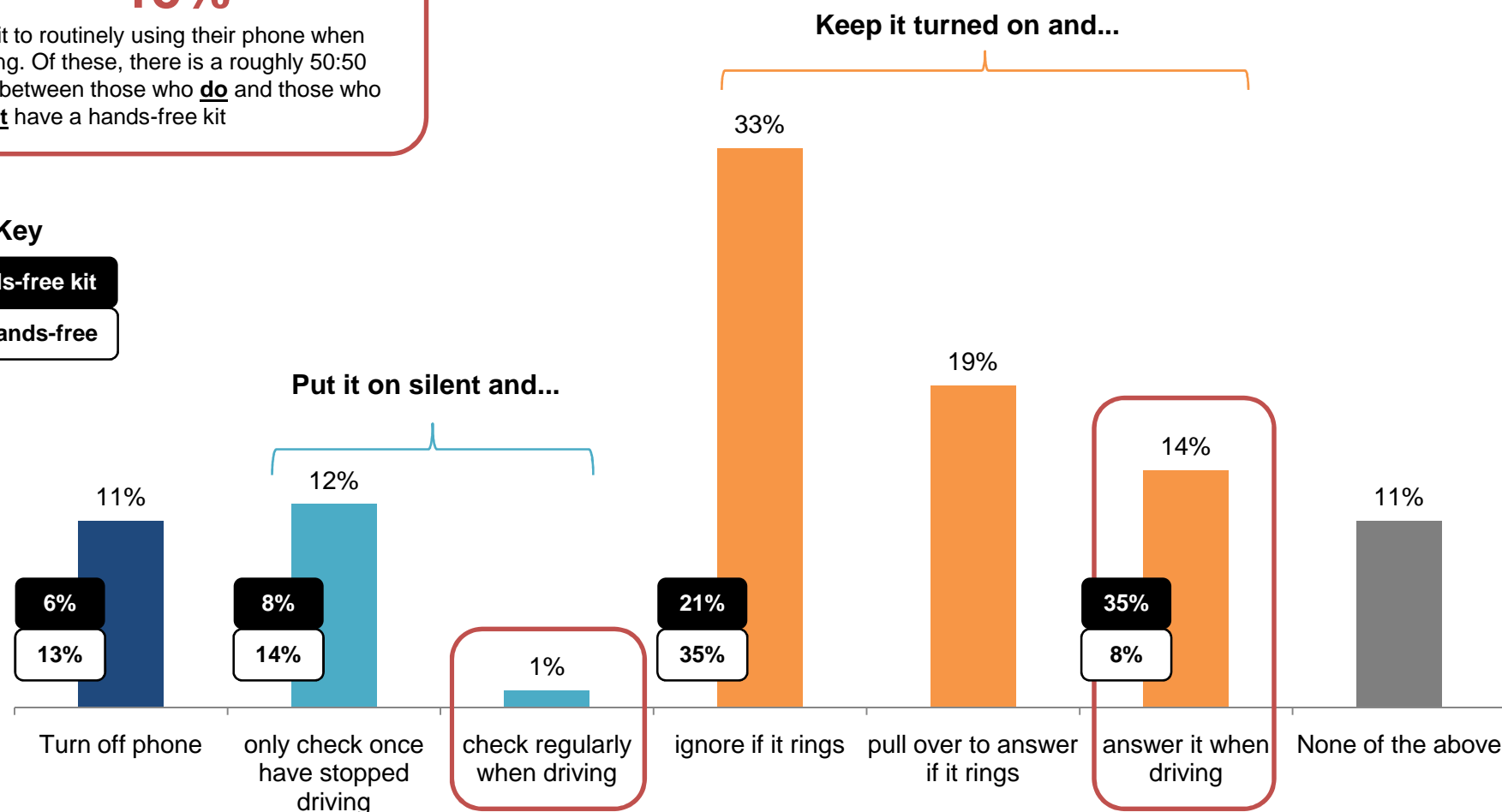
**15%**

admit to routinely using their phone when driving. Of these, there is a roughly 50:50 split between those who **do** and those who **don't** have a hands-free kit

## Key

Hands-free kit

No hands-free





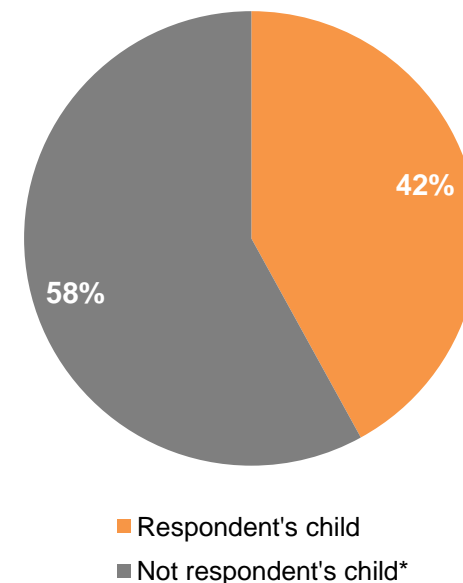
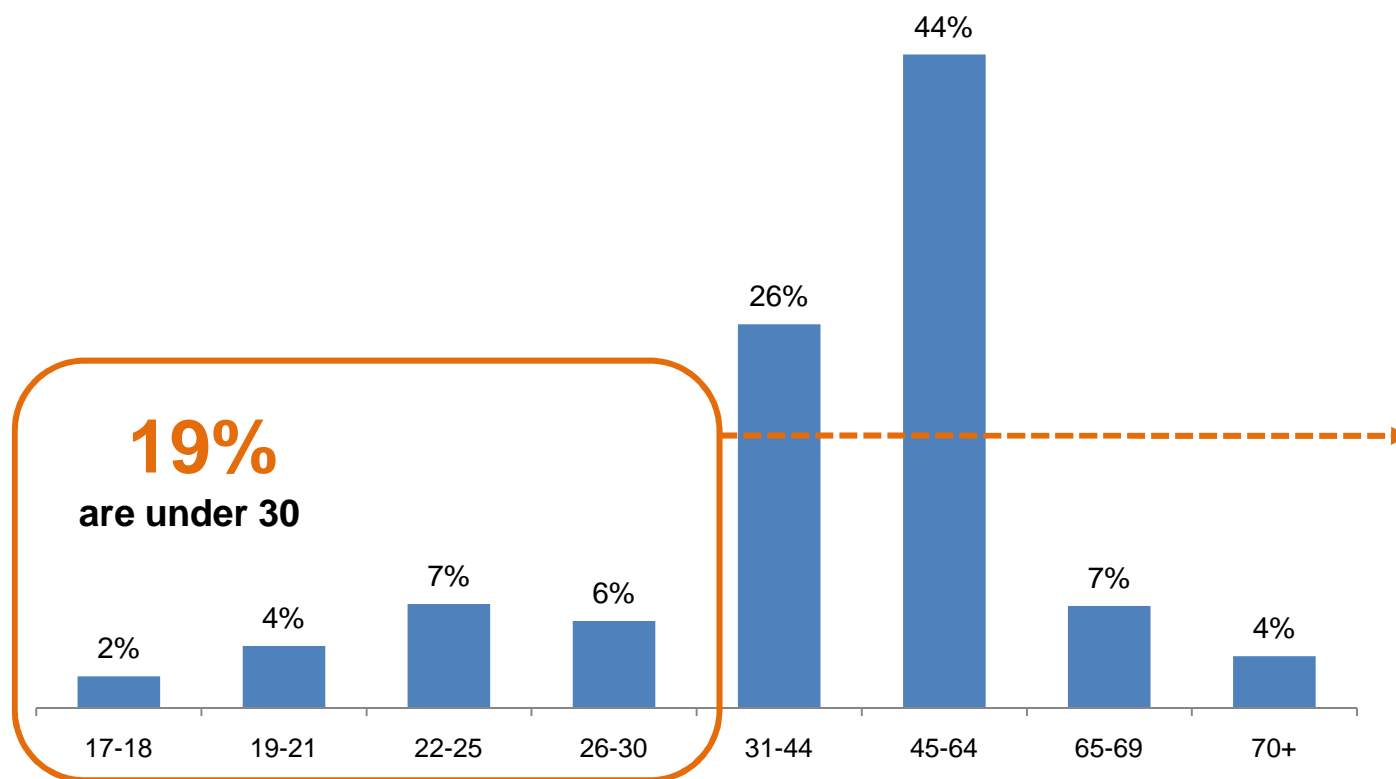
# Young drivers.

# Households with young drivers.

Nearly half of those sharing a household with a younger driver is (one of) their parent(s).

Age of other drivers in household

Relationship to younger driver(s) in household

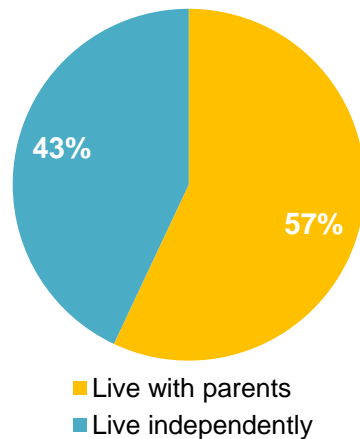


\* i.e. partner, sibling, grandchild or other relative

# Profiling young drivers.

The majority of young drivers under 25 live with their parents, are prevented from moving out by financial concerns, and drive their own car.

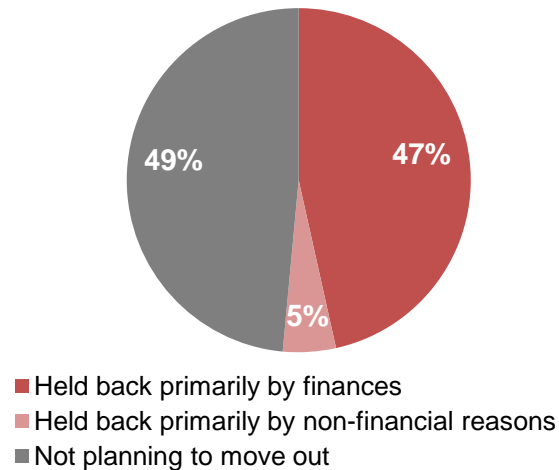
## Living arrangements



### SEG bears a strong influence on living arrangements:

- ABC1 more likely to live independently (52%)
- C2DE more likely to live at home (64%)

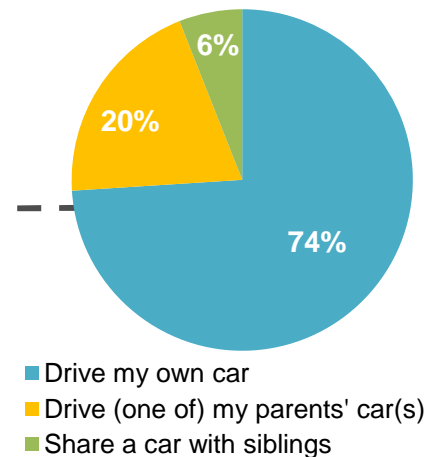
## Plans to move out



### Family circumstances tend to dictate whether young drivers have use of their own car:

- More likely to drive their own car if a parent (80%)
- More likely to drive a parent's car if no children at home and not a parent (30%)

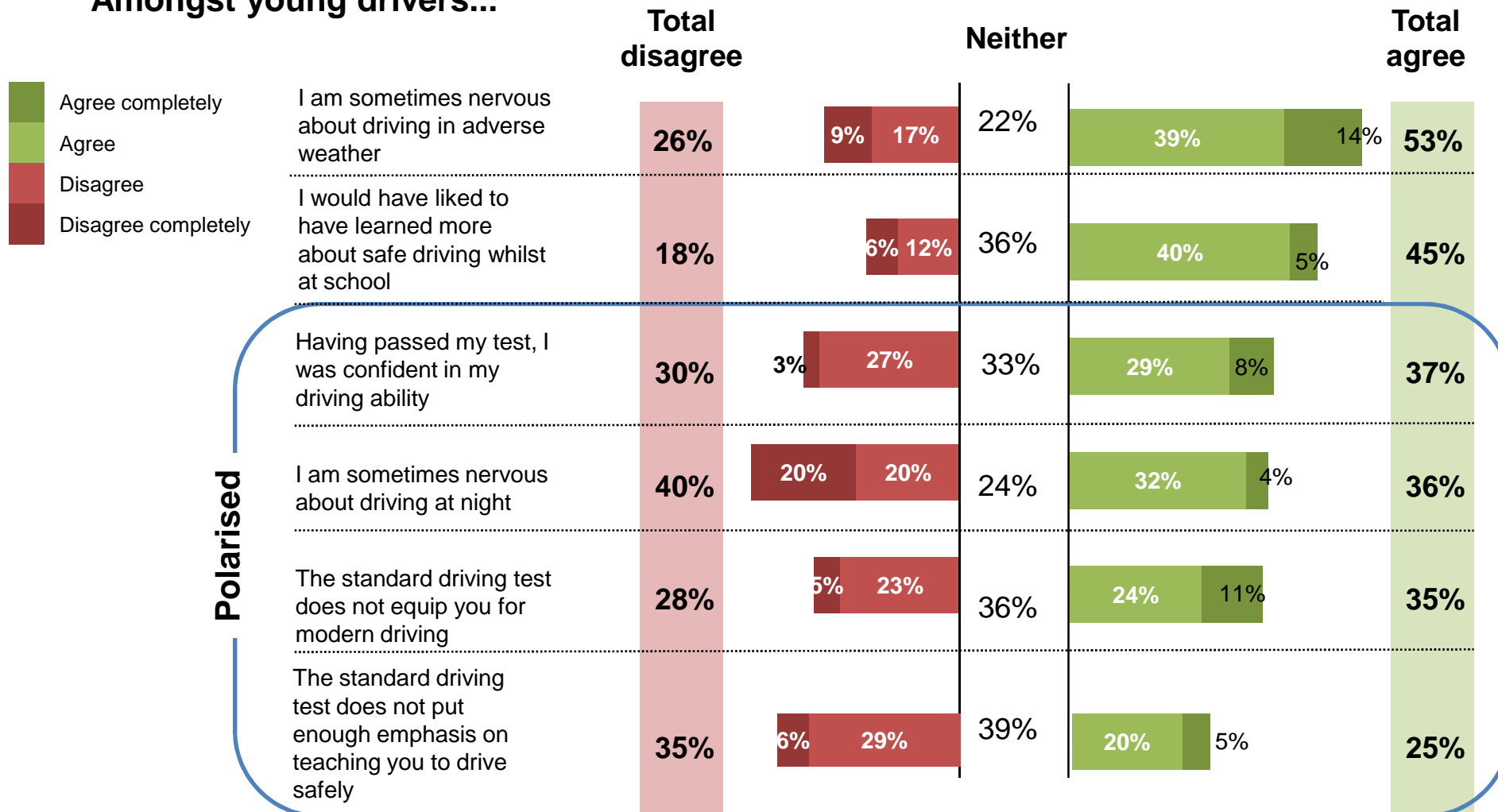
## Car usage



# How young people feel about driving (1).

Young people can have polarised opinions about how well they have been equipped by driving education; females and non-speeders are less likely to feel confident in their abilities.

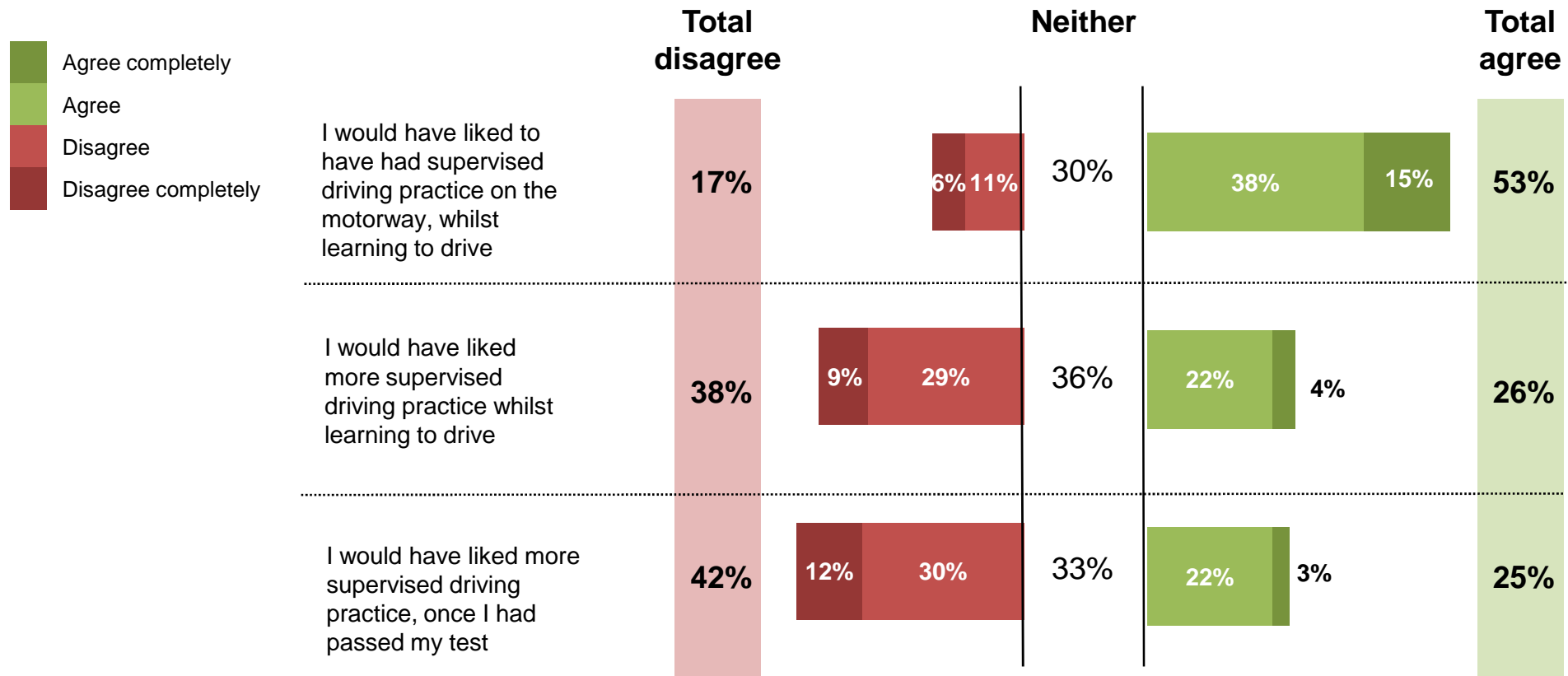
## Amongst young drivers...



# How young people feel about driving (2).

Half of young drivers would have wanted additional practice on motorways, however there is not much enthusiasm for any other type of additional lessons. Again, females are more likely to feel that additional practice was warranted.

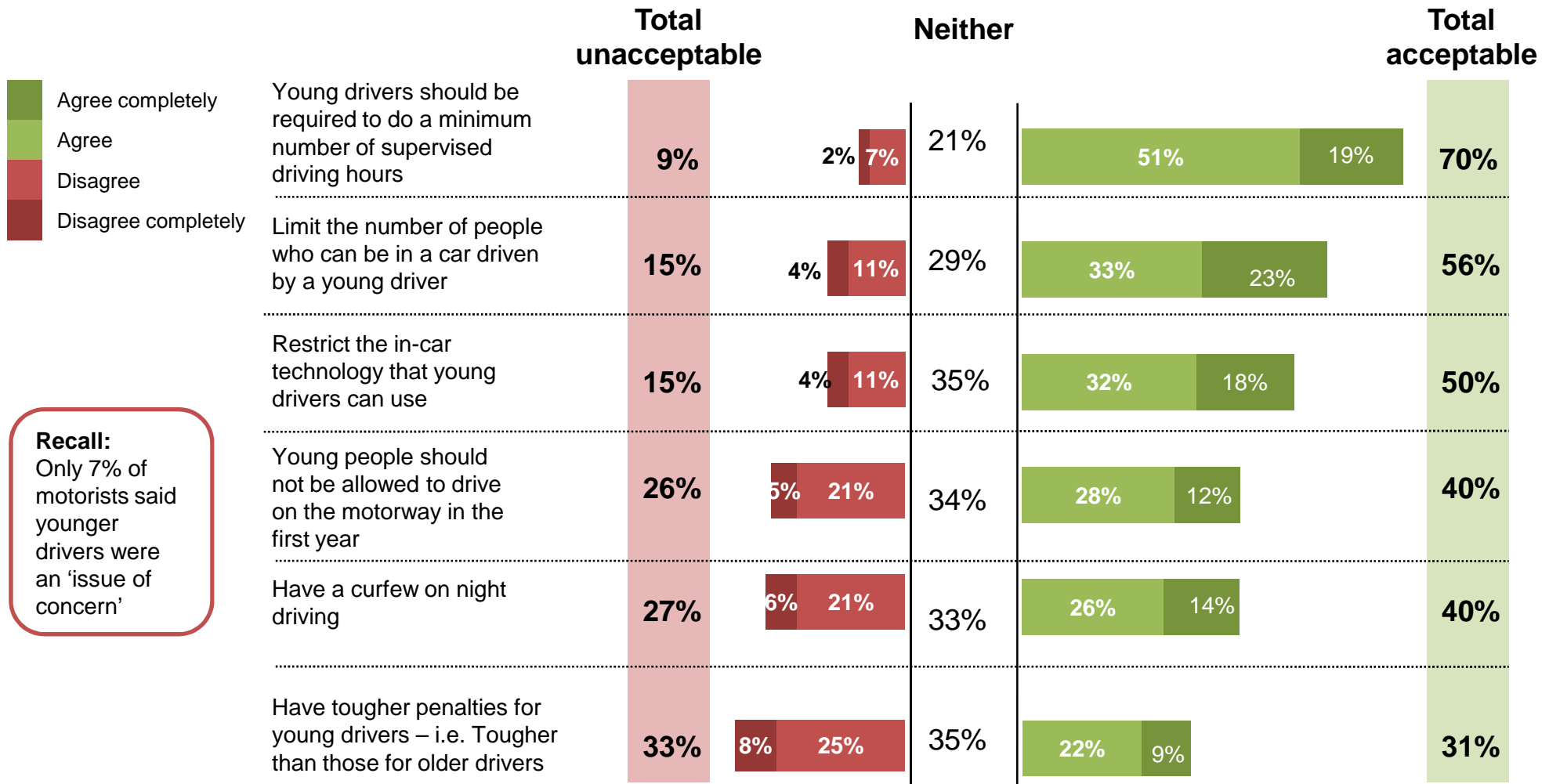
## Amongst young drivers...



# Improving safety by restricting young drivers.

7 in 10 feel that young drivers should have a minimum amount of supervised hours driving prior to gaining their license.

## Amongst parents...

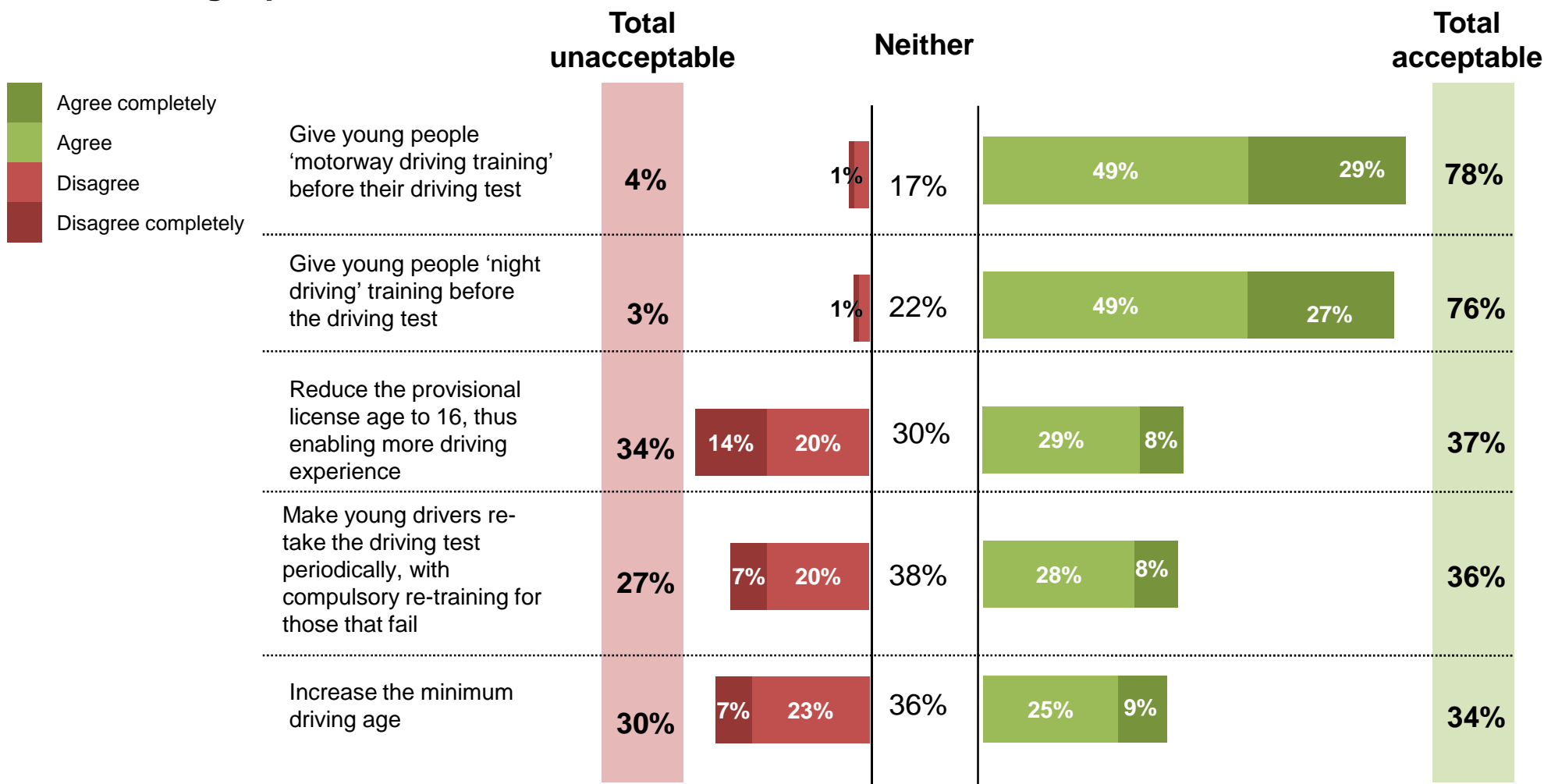




# Improving safety by restricting young drivers (2).

Along with half of young drivers, the vast majority of parents believe that motorway driving should form an integral part of driving education. Training in night driving is also considered to be a priority.

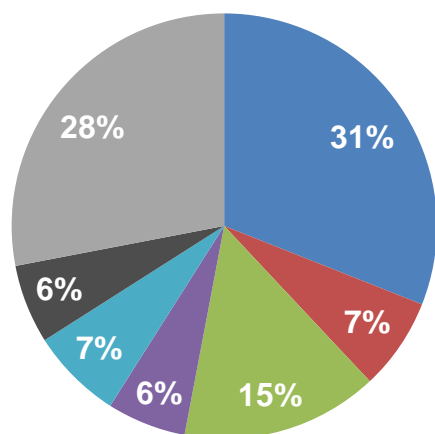
## Amongst parents...



# Helping children become drivers.

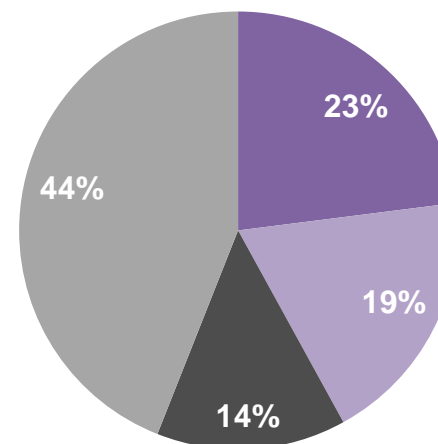
1 in 3 parents plan to pay for their children's driving lesson, and 4 in 10 have thought about arrangements for taking out their child's car insurance policy.

**General plans to help children once they reach driving age**



- Pay for driving lessons
- Buy them a car
- Help them buy a car
- Pay for their car insurance
- Currently saving for one or more of the above
- Don't plan on helping
- Not yet thought about it

**Plans regarding insurance in particular**



- Will add them to my policy
- Will take out a separate policy for them
- Don't plan to do either
- Don't know



# Gauging the mood in 2013 – Tracker questions.

# Issues of concern to motorists – by region.

The top 10 issues are the same nationally as they are for motorists in the South East and London, although they appear in a different order of concern. The concern of Londoners are distinct and different on several accounts.

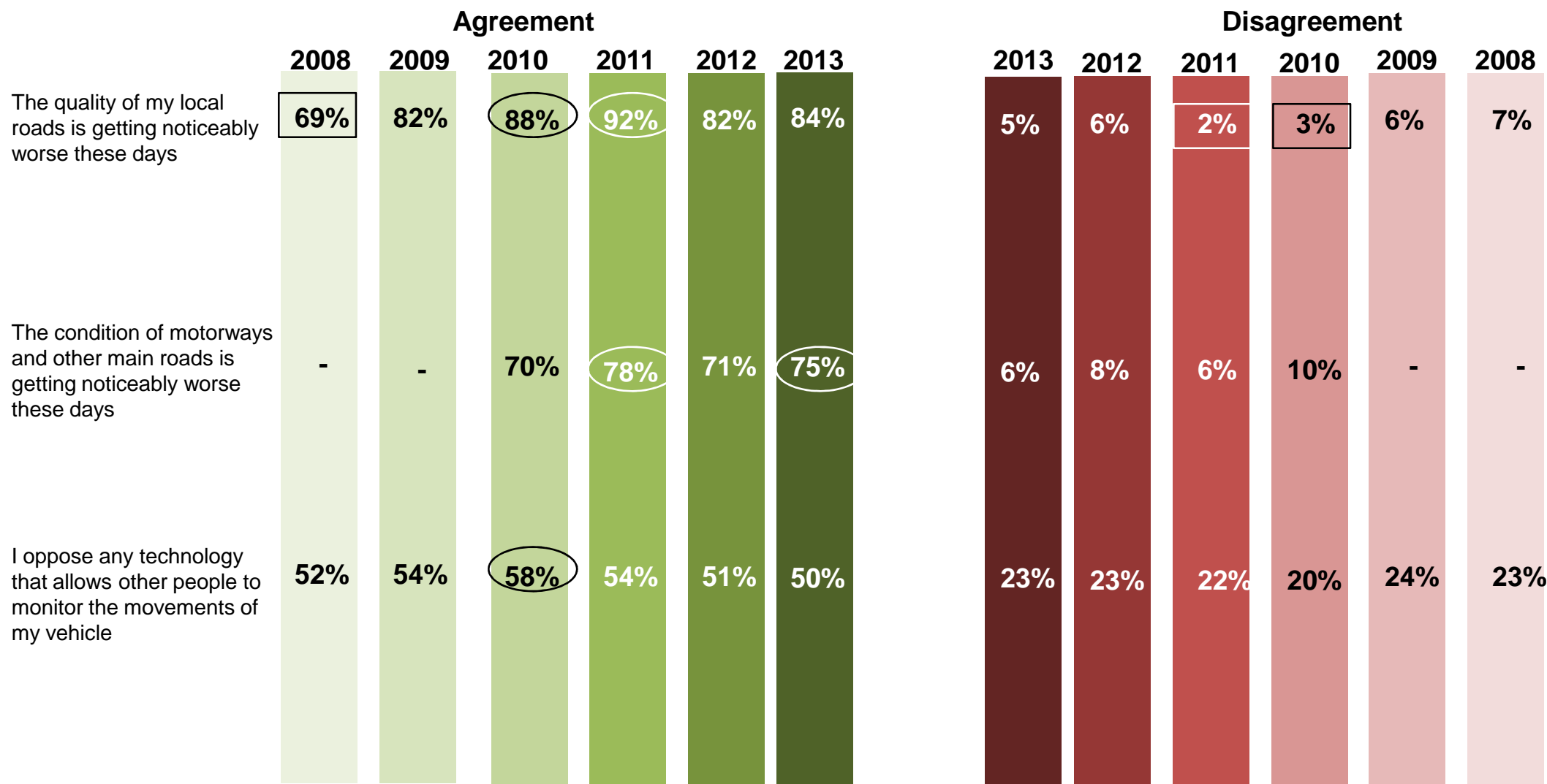
	UK	rank	London	rank	S East	rank
The cost of fuel for running a car	63%	1	47%	1	64%	1
Other people driving cars without tax/ insurance	37%	2	32%	5	37%	3
The condition and maintenance of roads in the UK	36%	3	26%	7	40%	2
The cost of insuring a car	35%	4	41%	2	28%	7
Other people talking on mobiles without hands free	33%	5	34%	3	36%	4
Drivers under the influence of drink	32%	6	33%	4	31%	5
Other people texting or accessing websites on mobile phones whilst driving	29%	7	27%	6	30%	6
Other people breaking traffic laws	21%	8	23%	9	22%	8
Drivers under the influence of drugs	19%	9	20%	10	17%	10
Traffic congestion/ slower journey times	18%	10	24%	8	22%	8
The number of accidents on the road	13%	11	13%	13	11%	12
The rudeness of other drivers on the road	13%	11	19%	11	14%	11
Preparation for and response to adverse weather conditions	11%	13	11%	14	9%	13
Older drivers (>70 yrs)	8%	14	6%	16	8%	14
Road closures and road works	8%	14	18%	12	6%	16
Environmental impact of motoring	7%	15	6%	16	7%	15
Younger drivers (<21yrs)	7%	15	7%	15	6%	16

**Note:**

Londoners are less likely to drive daily and on average drive 1566 miles less than the UK average in a year

# Views on motoring – general.

8 in 10 motorists believe their local roads are deteriorating, although the outlook is generally more positive than in 2010 and 2011 which seem to be blips. Opposition to monitoring technology continues to be at its lowest point and on par with 2008.



# Views on motoring – general.

Nearly 9 in 10 rural drivers agree that the quality of their local roads is getting noticeably worse. Over two-thirds of company car drivers agree that journey times are becoming less predictable, both locally and on motorways.

## More likely to agree...

## More likely to disagree...

■ Agree strongly ■ Agree slightly ■ Neither ■ Disagree slightly ■ Disagree strongly

The quality of my local roads is getting noticeably worse these days

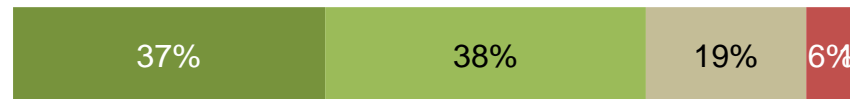
91% 65+ years old  
87% Village/rural



11% London  
8% City/town

The condition of motorways and other main roads is getting noticeably worse these days

82% 42-64 years old  
81% South West  
78% Village/ Rural  
77% Never use public transport



15% 17-24 years old  
8% Regular Speeders

Congestion seems to be getting worse compared to one year ago

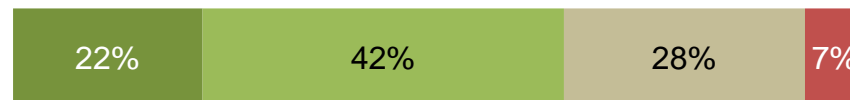
69% 65+ years old  
71% Yorkshire & Humberside



11% Scotland  
13% Company car drivers  
10% Upper Medium vehicle type

Motorway journey times are becoming less predictable

71% 45-64 years old  
73% Company car  
72% London & NW  
67% Suburb



13% 17-24 years old  
10% ABC1  
10% Upper medium vehicle

Local journey times are becoming less predictable

71% Company car drivers  
72% London



14% 17-24 years old  
12% ABC1  
21% North East  
14% Village/ Rural

I oppose any technology that allows other people to monitor the movements of my vehicle

54% Male  
56% High mileage  
64% London

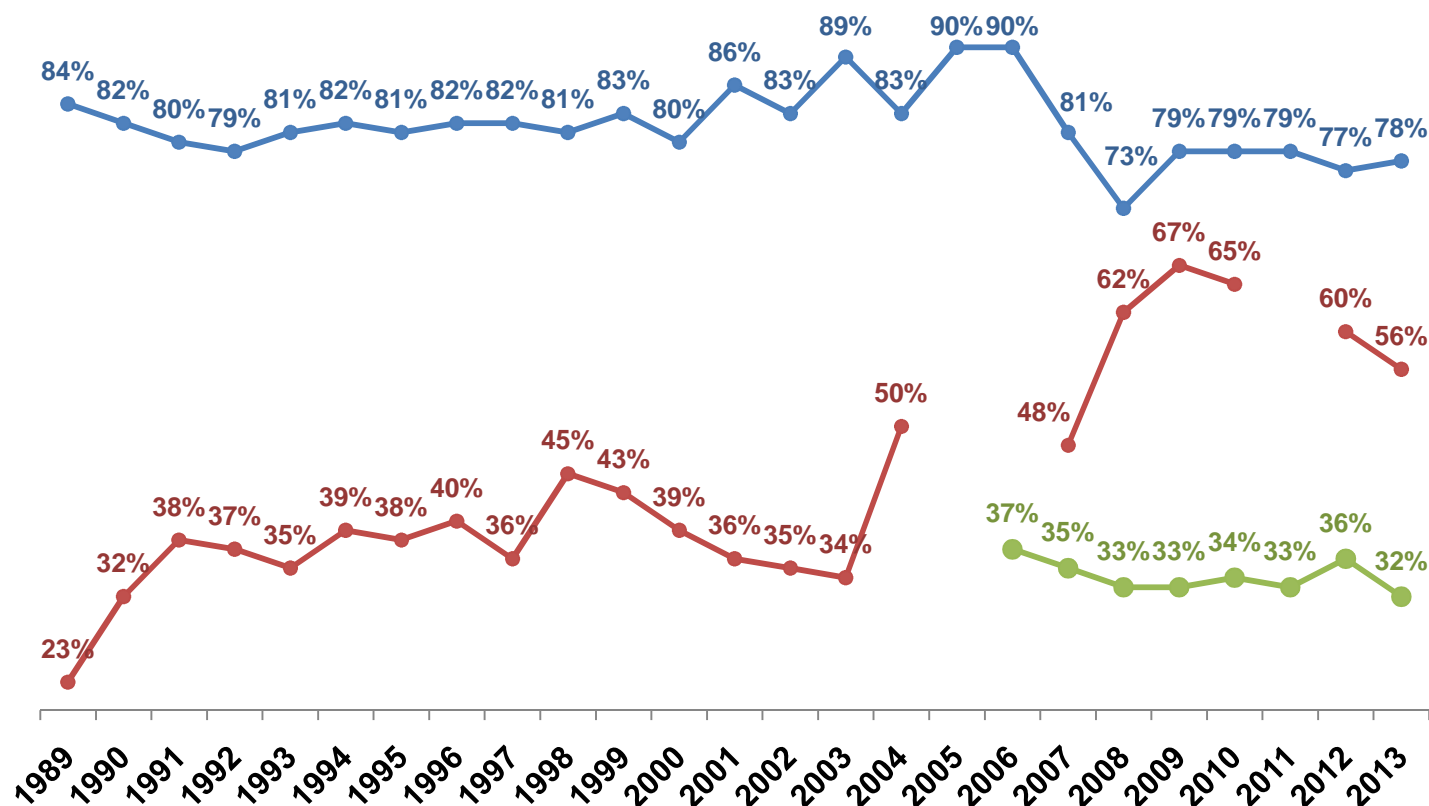


27% 65+ years old  
28% South East  
30% Upper medium vehicle type

# Relationship with car over time.

Over the last 25 years, motorists have become increasingly likely to consider using public transport, and are finding it increasingly easier to adjust to a car-free lifestyle.

Number who 'Agree' and 'Strongly Agree'



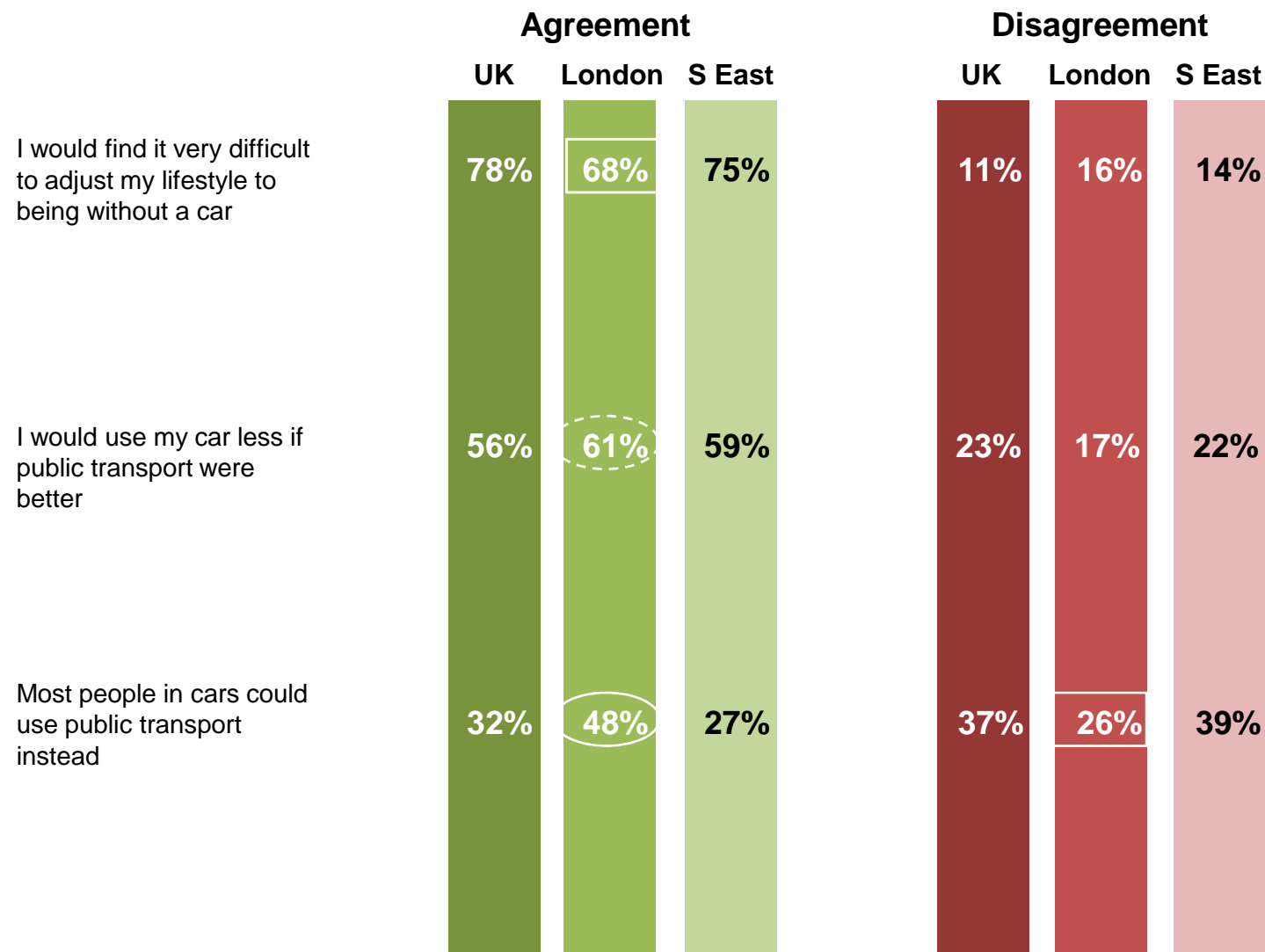
"I would find it very difficult to adjust my lifestyle to being without a car"

"I would use my car less if public transport were better"

"Most people in cars could use public transport instead"

# Me and my car – by region.

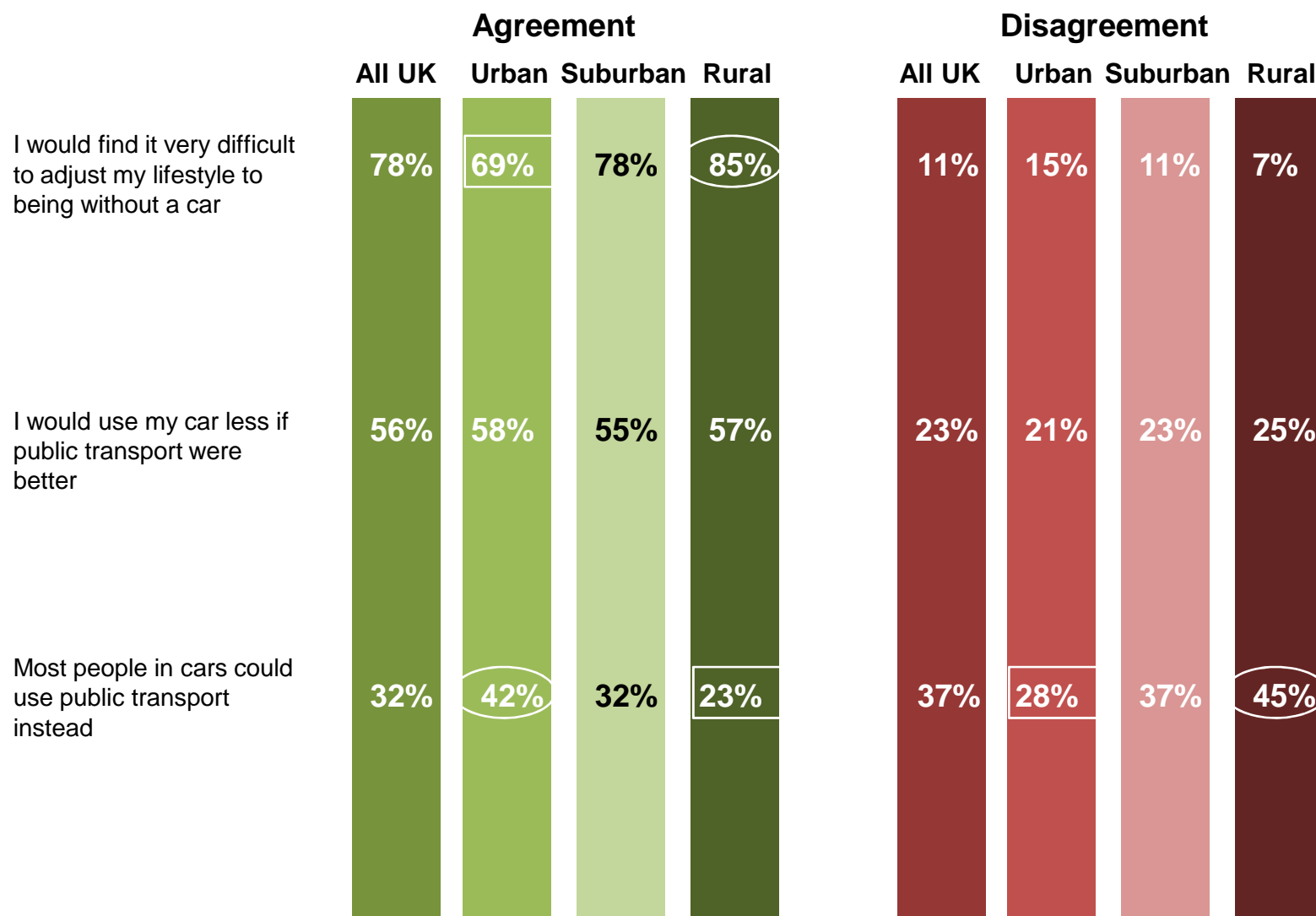
Motorists in the South East tend to match national attitudes when it comes to their car usage. Londoners, predictably, still tend to be more predisposed towards public transport and are most likely to envisage a 'carless' lifestyle in the future.





# Me and my car – by location.

Like Londoners, city dwellers are more predisposed towards public transport than their suburban and rural counterparts. Rural motorists are particularly reliant on their cars and are less likely to have faith in public transport.



# Views on motoring – me and my car.

17-24 year olds are more likely to be flexible in terms of taking public transport or adjusting to a carless lifestyle, as are those who live in cities and towns.

## More likely to agree...

## More likely to disagree...

■ Agree strongly ■ Agree slightly ■ Neither ■ Disagree slightly ■ Disagree strongly

I would find it very difficult to adjust my lifestyle to being without a car

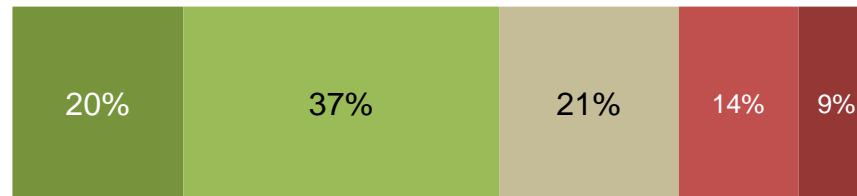
84% 45-64 years old  
80% Female  
86% Drive >12,00 miles/yr  
85% East of England  
85% Village/rural



21% 17-24 yrs old  
14% Drive <6,000 miles/yr  
16% London  
15% City/town  
18% 0-9 years driving

I would use my car less if public transport were better

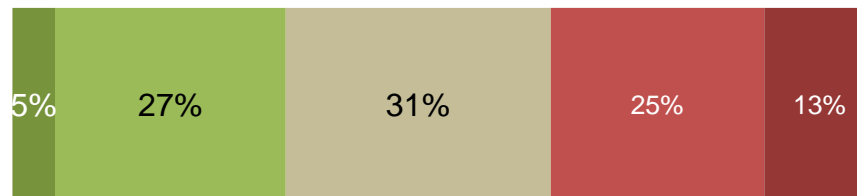
69% 17-24 years old  
59% ABC1  
64% 0-9 years driving  
64% Scotland



26% 45-64 years old  
28% Drive >12,000 miles/yr  
30% West Midlands  
28% Never use public transport

Most people in cars could use public transport instead

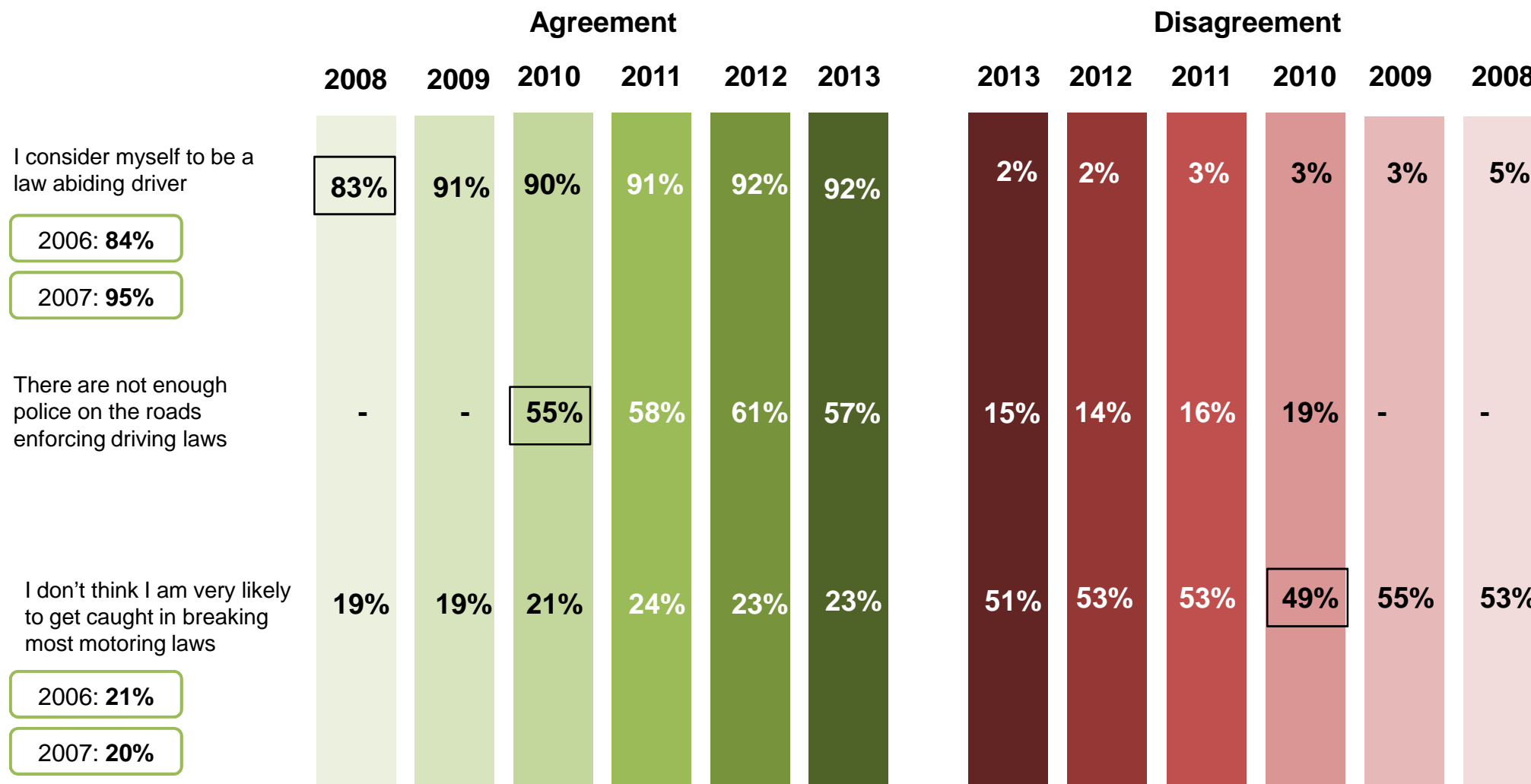
52% 17-24 yrs old  
37% Drive <6,000 miles/yr  
48% London  
41% North East  
42% City/town



44% 45-64 yrs old  
42% ABC1  
53% Company car drivers  
57% Drive >12,000 miles/yr  
45% Village/Rural

# View on motoring – the law.

Willingness to comply to motoring laws is high, however, one-quarter of motorists feel they are unlikely to get caught as more motorists still believe that there is a lack of police enforcing motoring laws.



# View on motoring – the law.

Speeders believe that they are less likely to be caught breaking a motoring law than other drivers, although they don't wish to see any more police on the roads either.

## More likely to agree...

■ Agree strongly ■ Agree slightly ■ Neither ■ Disagree slightly ■ Disagree strongly

I consider myself to be a law abiding driver

93% 45+ years old  
97% Wales  
94% Village/ Rural  
95% Non-speeder  
(83% Regular speeders!)

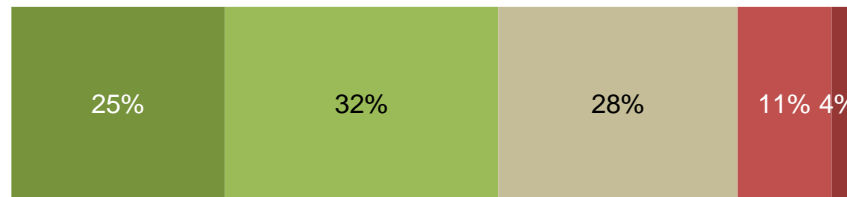


## More likely to disagree...

4% Drive >12,000 miles/yr  
3% North West & South West

There are not enough police on the roads enforcing driving laws

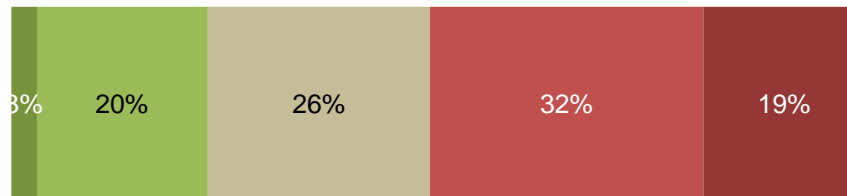
64% 45+ years old  
66% East of England  
68% Van/ unspecified vehicle  
65% Non-speeders



21% 17-24 years old  
23% Scotland & North East  
23% Upper medium vehicle  
24% Regular speeders

I don't think I am very likely to get caught in breaking most motoring laws

31% Male  
26% ABC1  
27% North West  
42% Regular speeders



58% Female  
62% North East  
61% Non-speeder

# Views on motoring – new topics (1).

Most motorists express concern for the rising cost of motoring, particularly younger age groups and C2DE drivers. Many also suspect that motorists are targeted by the Government for raising funds, via speed cameras and taxes.

## More likely to agree...

■ Agree strongly ■ Agree slightly ■ Neither ■ Disagree slightly ■ Disagree strongly

## More likely to disagree...

Motorists are hit by high taxes as they are easy targets for the Government

92% Male  
91% Rural/ Suburban  
93% Drive >12,000 miles/yr



6% City/town  
6% Regular public transport users

Speed cameras are more about raising money than improving road safety

80% 45-64 years  
84% Scotland  
82% Regular speeders



15% 17-24 years  
15% Mini/ supermini drivers

Roads have become too cluttered with unnecessary and unhelpful signage

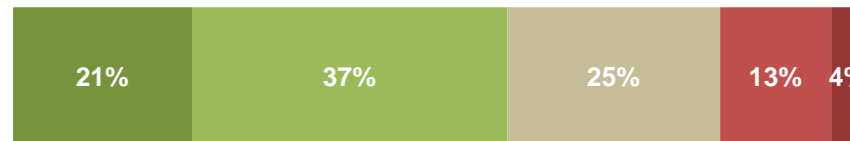
74% 65+ years old  
68% Male  
69% London



17% 17-24 years old  
16% Drive >12,000 miles/yr  
21% North East

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

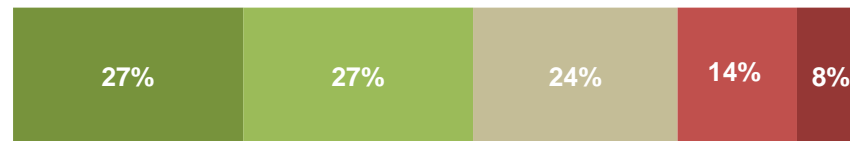
67% C2DE  
64% London  
65% Regular public transport users



30% Company drivers  
26% Drive >12,000 miles/yr  
20% Rural

If fuel was more affordable then I would have a fuller social life and would be able to visit friends/ family more

77% 17-24 years old  
62% C2DE  
60% Regular public transport users



27% ABC1  
34% Company drivers

# Views on motoring – new topics (2).

Nearly all motorists agree that road safety is a shared responsibility for all road users – including 94% of regular speeders!

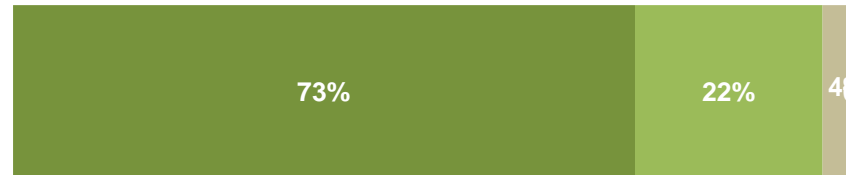
## More likely to agree...

## More likely to disagree...

■ Agree strongly ■ Agree slightly ■ Neither ■ Disagree slightly ■ Disagree strongly

Road safety is a shared responsibility for all road users, i.e. cyclists, motorcyclists and motorists alike

98% 65+ years  
100% Wales  
96% Rural



6% 4x4/ SUV/ Sports car drivers

Local authorities and utility companies do not appear to co-ordinate the time of roadworks to ensure free-flowing diversion routes

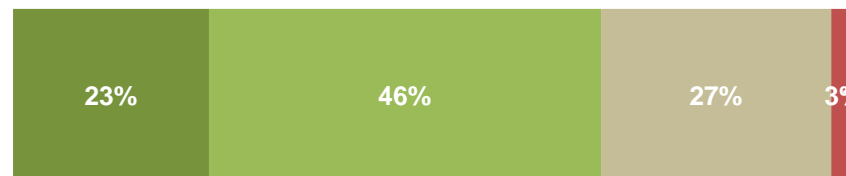
90% 45+ years old  
86% Rural



6% 17-24 years old

Much tougher steps should be taken to reduce congestion

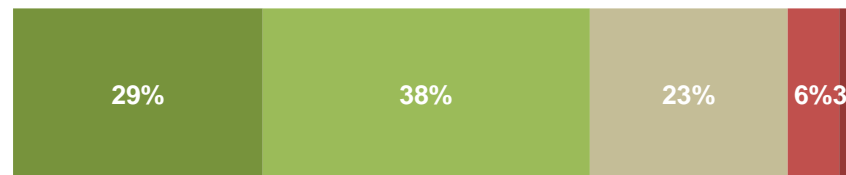
74% 45+ years old  
72% London & S East



7% Drive >12,000 miles/yr  
6% Regular speeders

The Government needs to do more to make alternatively-powered, low carbon cars more affordable

71% C2DE  
72% Parents  
73% Those who would consider a green car



13% Males  
13% ABC1  
16% Regular speeders

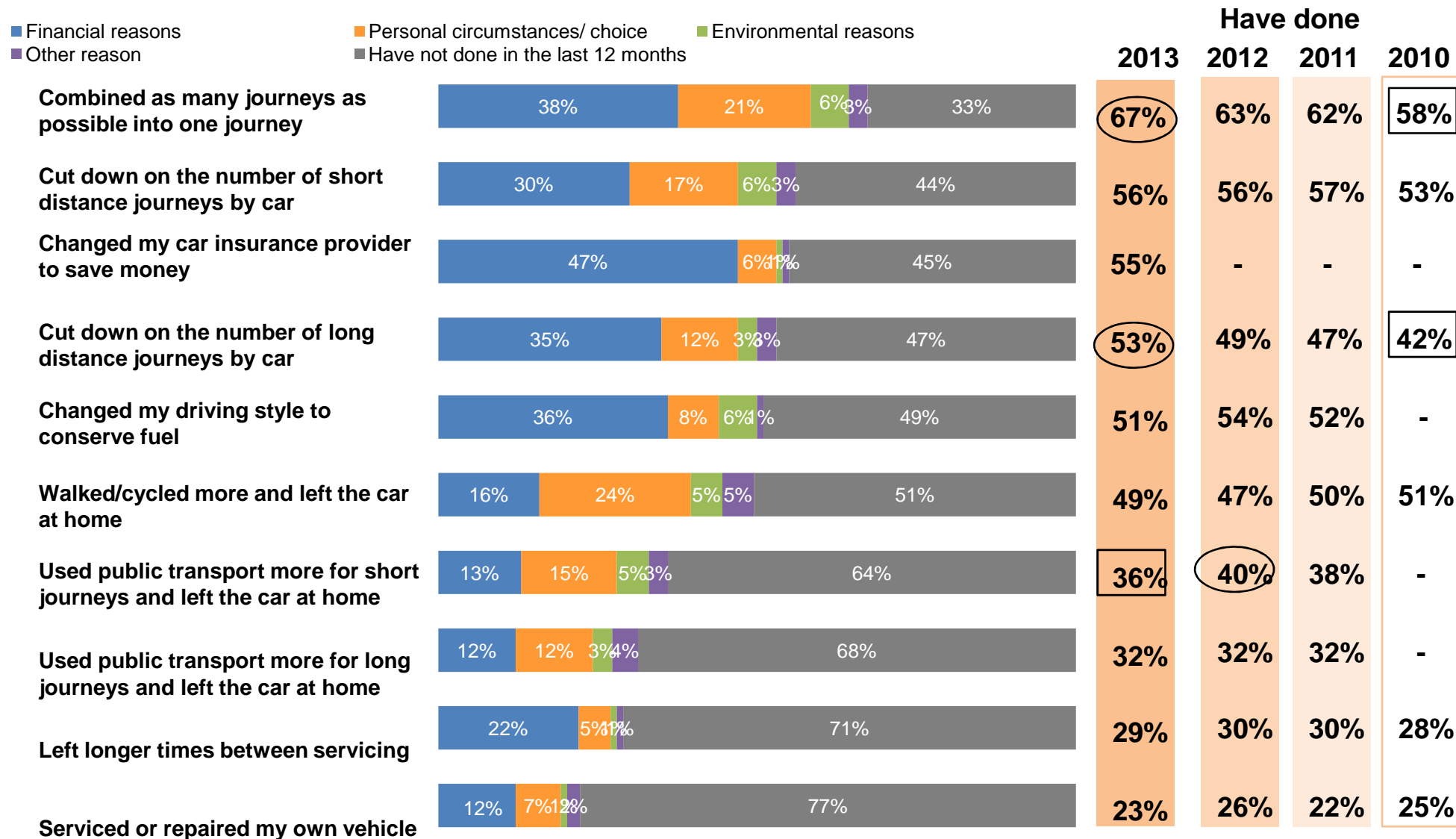
# Spending motoring taxes – by region.

Opinions across London, the South East and the UK national average are relatively consistent, although Londoners are more likely to believe that motoring taxes are reinvested into local roads – Londoners are also most concerned by road works.

	Agreement						Disagreement					
	UK	Rank	London	Rank	S East	Rank	UK	Rank	London	Rank	S East	Rank
<b>I don't believe</b> the motoring taxes I pay are sufficiently <b>reinvested into local roads</b>	78%	1	69%	1	81%	1	6%	6	11%	6	4%	6
<b>I believe more</b> of the taxes raised through motorists should be <b>invested back into public transport</b>	58%	2	53%	2	61%	2	16%	5	18%	5	13%	5
<b>I believe</b> that taxes raised through motorists are used to <b>deter motorists from using their vehicles</b>	47%	3	48%	3	47%	3	20%	4	24%	4	21%	4
<b>I would support</b> the introduction of <b>more toll roads as an alternative</b> to the current level of motoring tax	31%	4	31%	4	36%	4	42%	3	47%	2	38%	3
<b>I believe</b> that the current level of motoring taxes paid is a <b>fair price for our motoring freedom</b>	17%	5	20%	5	15%	5	56%	1	52%	1	57%	1
<b>I believe</b> the current level of motoring taxes paid is a <b>fair price for the environmental damage</b> motoring can cause	16%	6	18%	6	15%	5	51%	2	46%	3	56%	2

# Behaviour over the last 12 months (1).

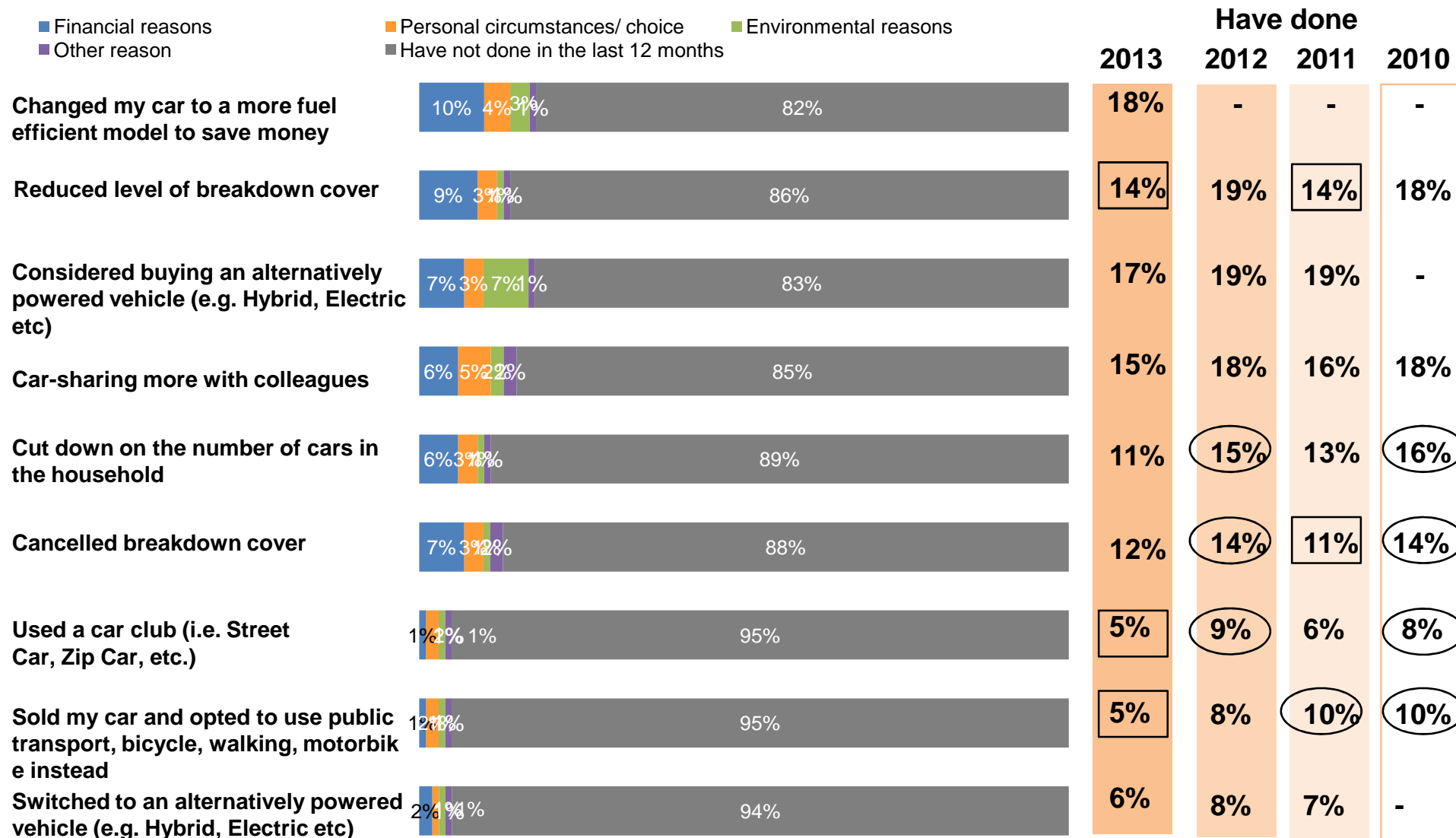
No large changes in behaviour have occurred since 2011. The majority of motorists continue to combine and cut down on car journeys. These changes are nearly always for financial reasons.





# Behaviour over the last 12 months (2).

More radical behaviour changes – such as those that require changing vehicles – continue to be less common but consistent over the past few years.





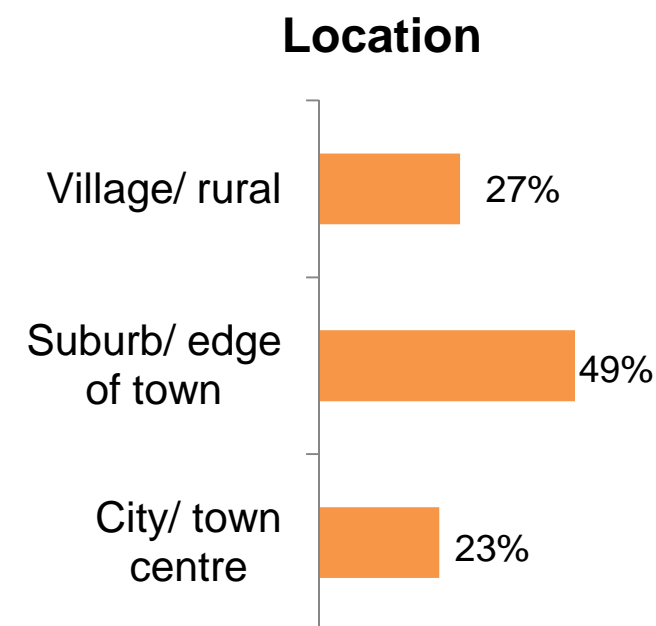
# Appendix.

# Sample demographics.

		Final weighted (n=1,542)
Sex	Male	49%
	Female	51%
Age	17 – 24	13%
	25 – 44	36%
	45 – 64	31%
	65-69	10%
	70+	10%
SEG	ABC1	55%
	C2DE	45%

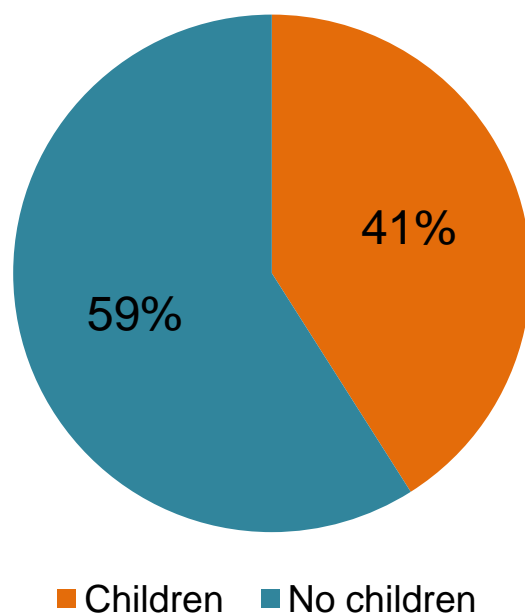
# Region.

	Quota set (n=1,000)	% Achieved (n=1,542)	Weighted (n=1,542)
East of England	9%	10%	9%
East Midlands	7%	7%	7%
London	13%	9%	13%
North East	4%	4%	4%
North West	12%	12%	12%
Scotland	9%	7%	9%
South East	14%	17%	14%
South West	9%	9%	9%
Wales	5%	5%	5%
West Midlands	9%	9%	9%
York/Humb.	9%	9%	9%

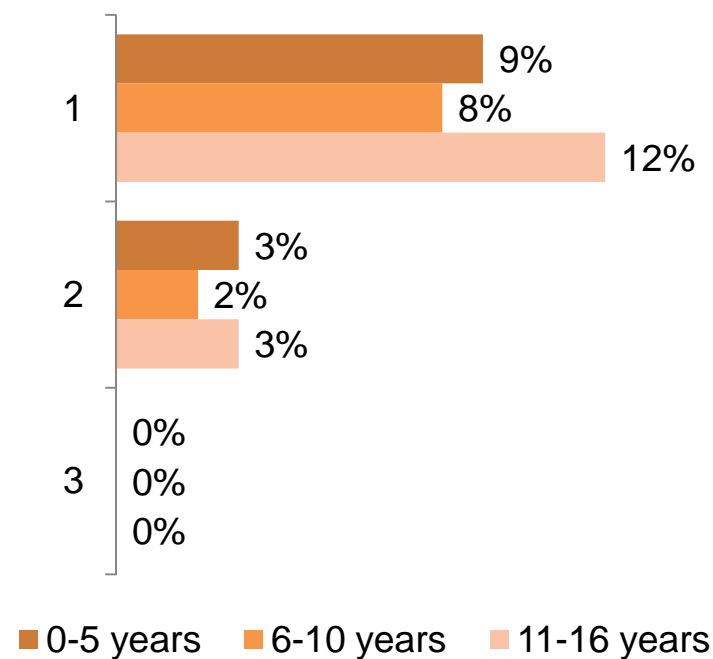


# Children in household.

Children in household\*

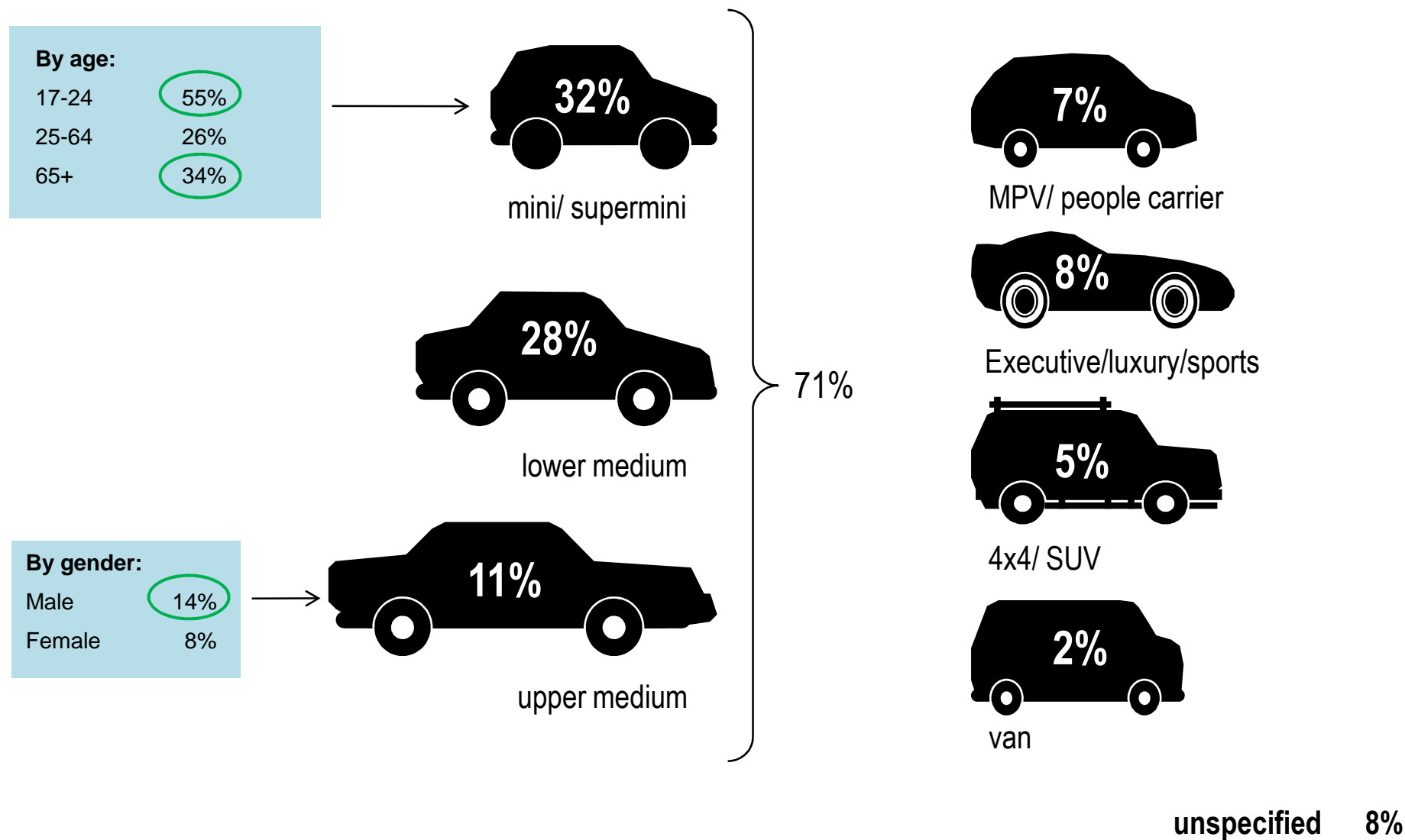


No. of children by age group



*\*Note: may not be respondent's child*

# Type of car.



# Number of cars per household.

4 in 10 have more than 1 car in their household, with younger, more affluent and rurally-located drivers typically having more cars per household than the average.

## Average no. of cars

### By age:

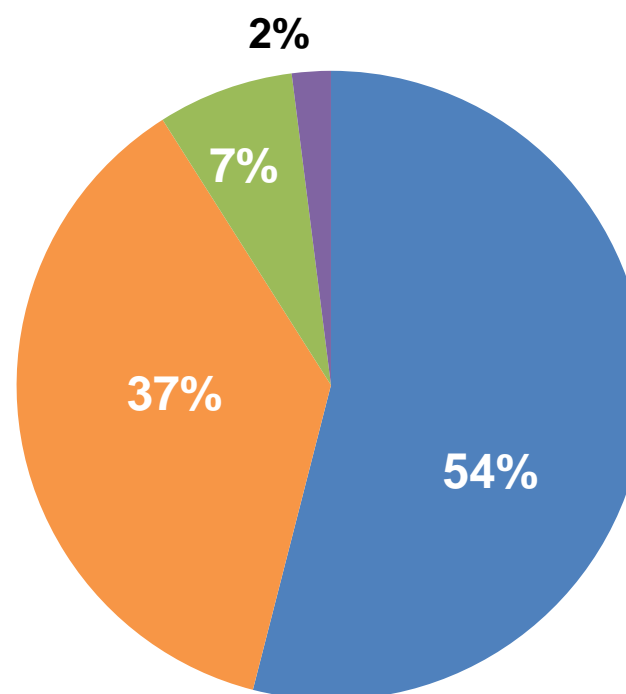
17-24	1.9
25-44	1.6
45-64	1.6
65+	1.3

### By SEG:

ABC1	1.7
C2DE	1.4

### By location:

City	1.5
Suburban	1.5
Rural	1.7



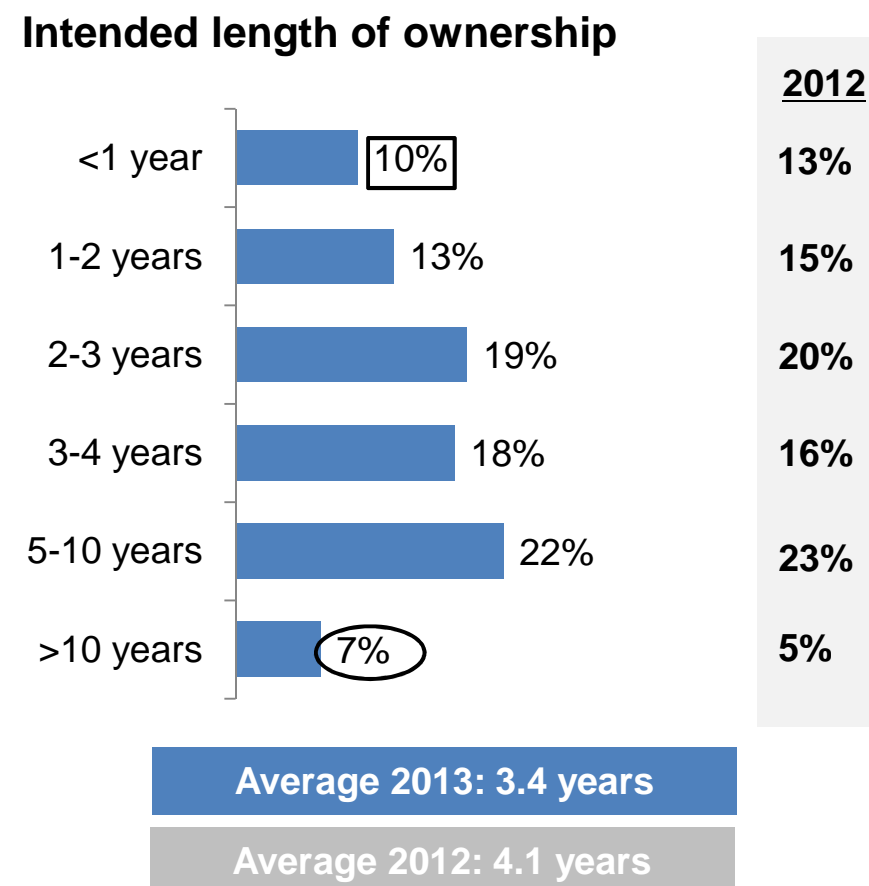
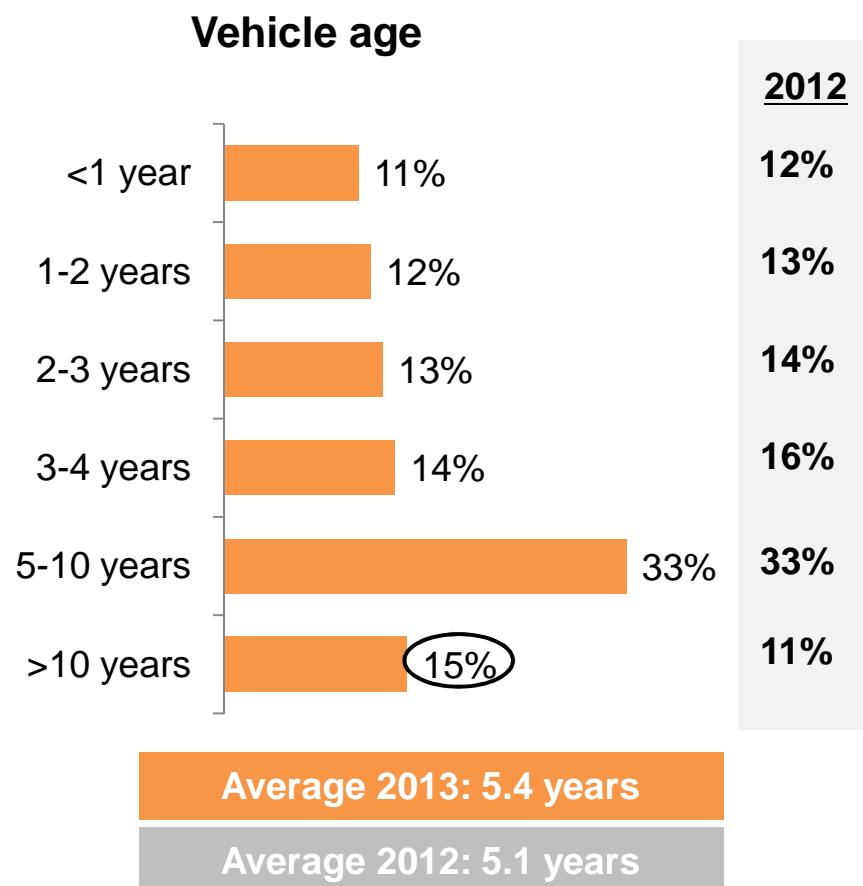
No. cars: 1 2 3 4

Average 2013: 1.6 cars

Average 2012: 1.5 cars

Average 2011: 1.7 cars

# Vehicle age and ownership intention.

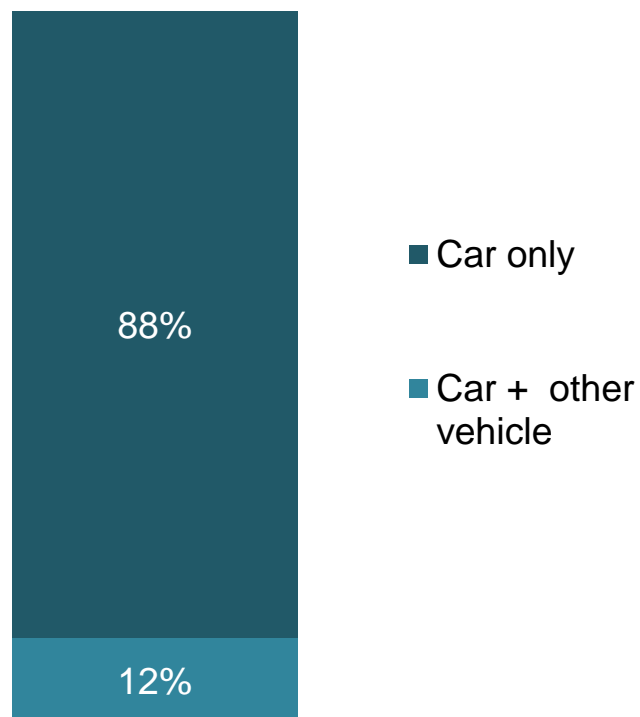




# Cars and vehicles in household.

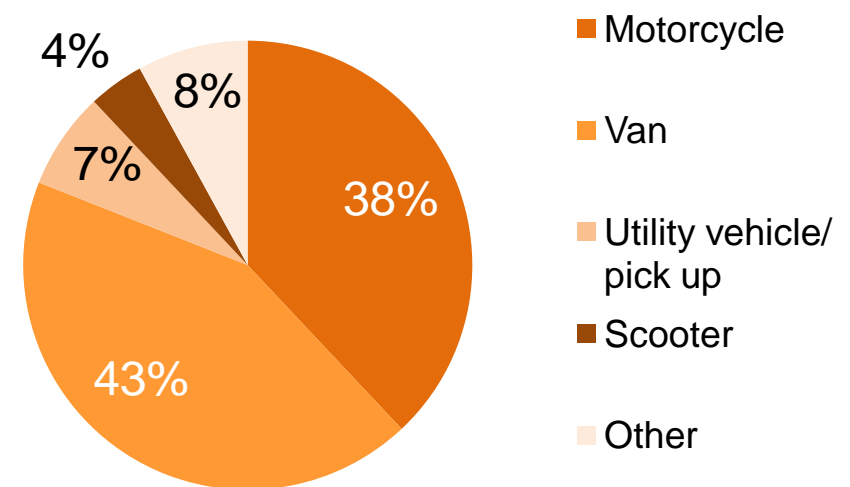
## SQ8. What type of motor vehicles do you have in your household?

Base: all respondents (n=1,542)

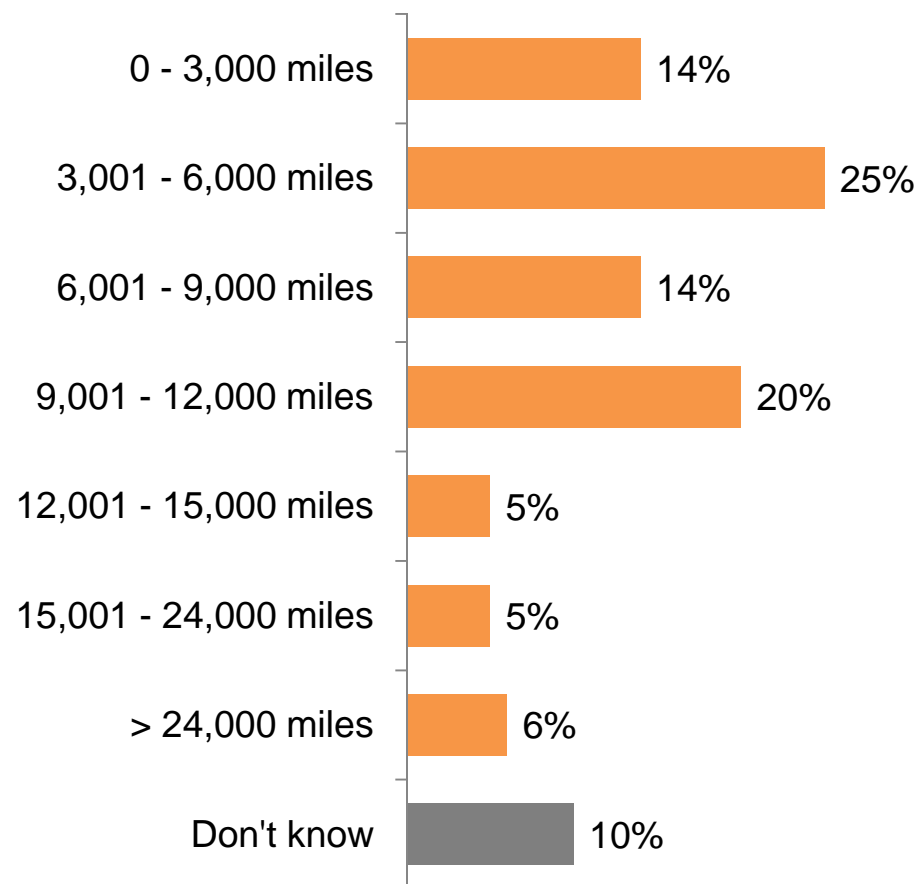


## SQ10. Besides a car(s) what other type of motor vehicles do you have in your household – that you use in a similar manner as you would a car?

Base: Owners of other motor vehicle types (n=176)



# Annual mileage.



## Mean mileage by group

**All motorists** 9,379

### By usage

Company car drivers 18,568  
Private motorists 8,272

### By rule-breaking behaviour

Regular speeders 11,241  
Non-speeders 7,338

### By demographics/lifestyle

Male 10,472  
Female 8,180



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