



RAC Report on Motoring 2012

Motorists Survey – Research Presentation

RAC RoM Steering Group Meeting

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Document prepared for:

RAC RoM Steering Group

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Presentation order.

Key findings

- From 2012 survey
- Supplemented with data from previous years where applicable
- Significant differences between key groups highlighted

1. About the motorist
2. Setting the scene
3. Gauging the mood in 2012 – tracker questions
4. Peak car
5. Safety on the road
 - Driving under the influence
 - Speed limits
5. The driving environment



About the motorist.

Type of car.

By age:

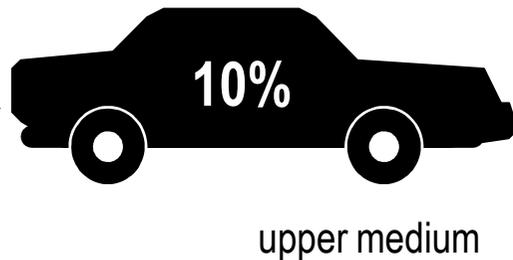
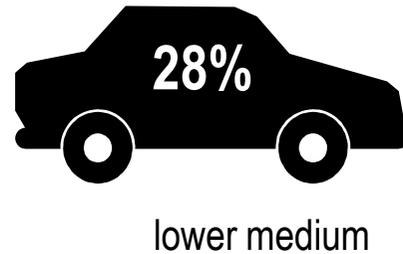
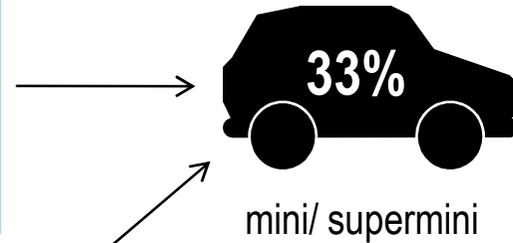
17-24	51%
25-69	30%
70+	37%

By children in household:

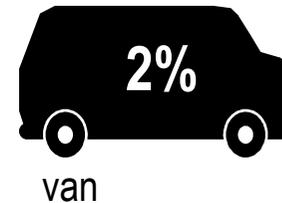
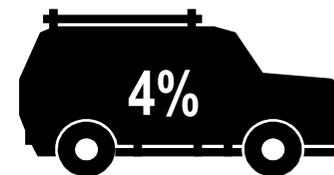
Children	24%
No children	39%

By gender:

Male	14%
Female	5%



71%



unspecified 6%

SQ15/SQ16 What is the make and model of the vehicle in the household that you mainly drive?
Base: motor vehicle owners (n=1,002)

Number of cars per household.

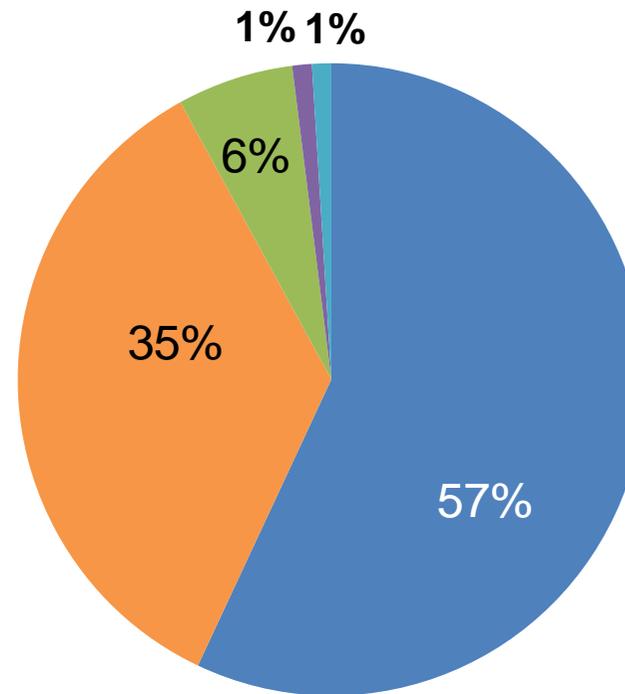
4 in10 have more than 1 car in their household, with younger, more affluent and rurally-located drivers typically having more cars per household than the average.

Average no. of cars

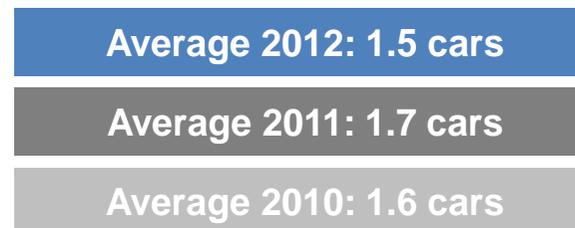
By age:	
17-24	1.99
25-44	1.56
45-59	1.55
60-69	1.29
70+	1.21

By SEG:	
ABC1	1.63
C2DE	1.42

By location:	
City	1.44
Suburban	1.50
Rural	1.69



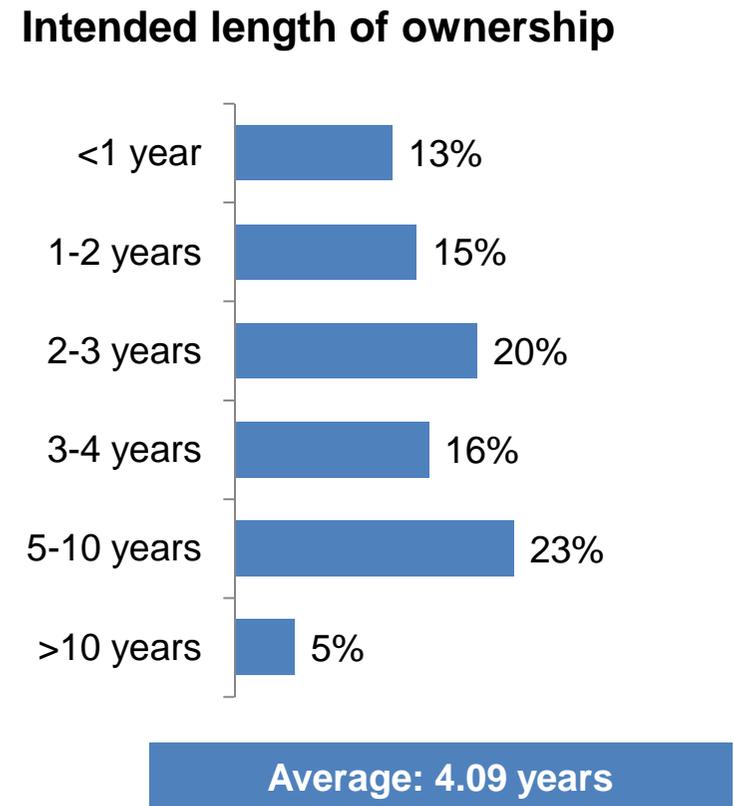
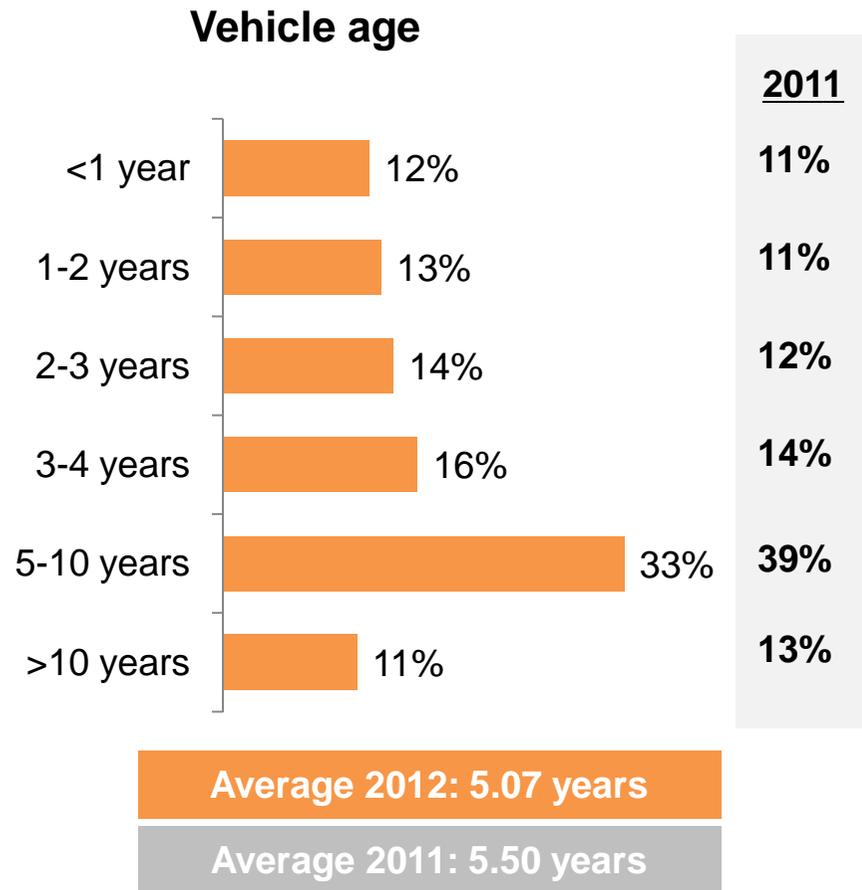
No. cars: 1 2 3 4 5



SQ19 How many cars are there in your household?
Base: motor vehicle owners (n=1,002)

Vehicle age and ownership intention.

The average vehicle age has decreased since last year. Those whose vehicles are already over 5 years old intend to keep their vehicle for longer than those who have newer vehicles. Buying a vehicle from new does not determine how long you will keep the vehicle for.



SQ17 Approximately how old is this vehicle?

SQ18 And how long do you think you will own this car for in total – taking into account how long you have owned it and how long you expect to keep it?

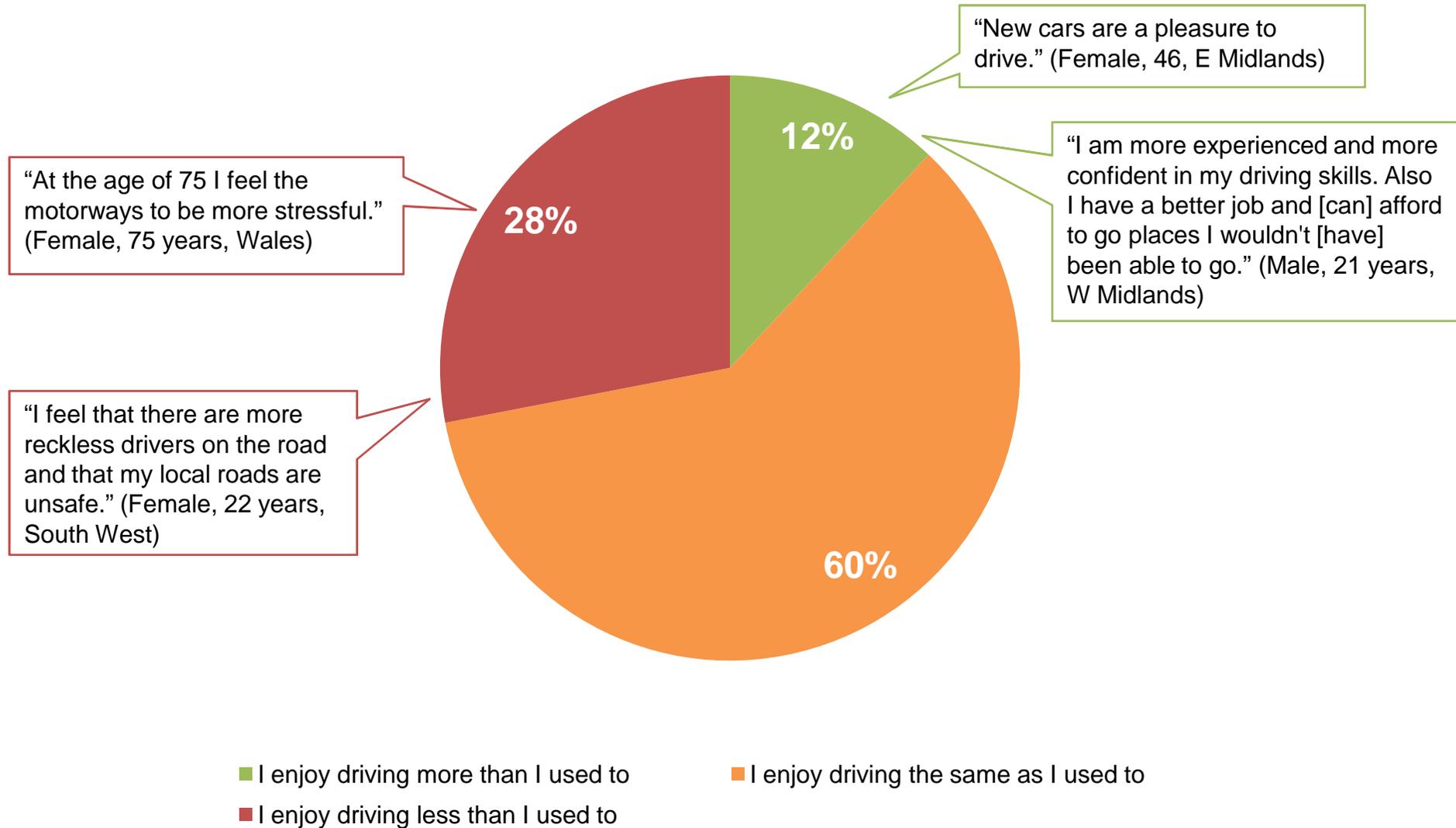
Base: motor vehicle owners 2012 (n=1,002); 2011 (n=1,002)



Setting the scene.

Driving enjoyment.

The outlook for motorists in 2012 is largely unchanged – 6 in 10 drivers say they enjoy driving as much as they used to. However, there is a slight negative outlook with 3 in 10 motorists enjoying driving less than they used to.



In summary...

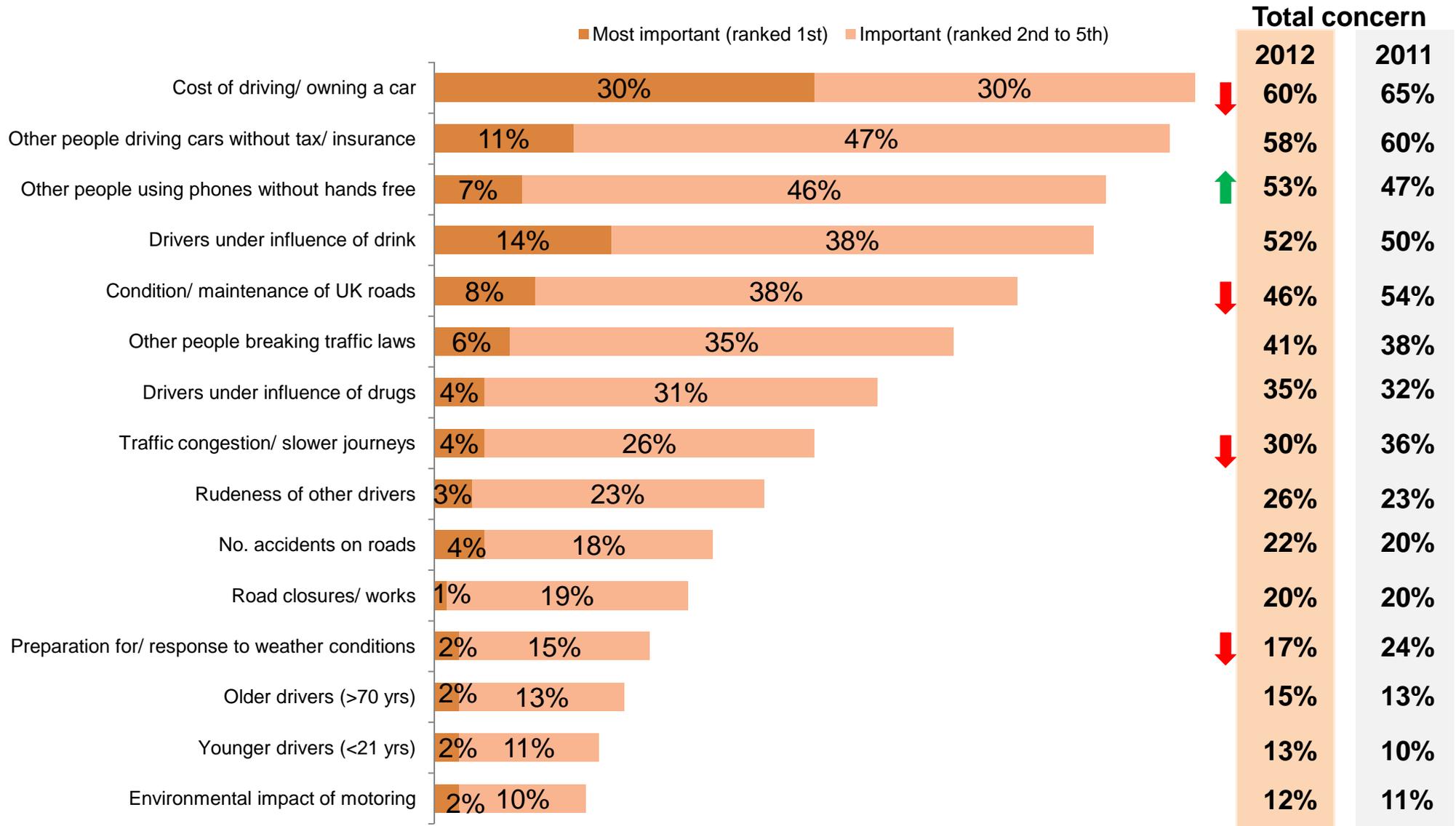
- There are no large changes in attitudes or behaviours in 2012 compared to previous years.
- A continued 'negative outlook' appears on issues such as drink driving, speeders and driving standards.
 - Is a perceived lack of police presence on the road reinforcing these law-breaking perceptions?
- Drivers continue to live with the financial constraints of the economy but it appears that the recession's impact on driving habits has not changed behaviour any further in 2012.
 - Across previous years we have seen motorists claim to be driving less (combining journeys, taking the train, cycling etc.), but despite this decreased usage of the car, their perceived *dependence* on their car is higher than five years ago.
 - Has a plateau of behaviour change (driven by the recession) been reached as non-critical journeys have already been abandoned by car?
- In 2012 we also see some interesting views on the cost of motoring – less concern than a year ago but at the same time the *perception* that it is continually increasing along with over-taxation.
 - Have consumers 'got used' to the pinch at the pumps?
- Motorists continue to recognise features that make the roads safer, including technology, but despite this, the road is seen as unsafe as it ever has been.



Gauging the mood in 2012 – Tracker questions.

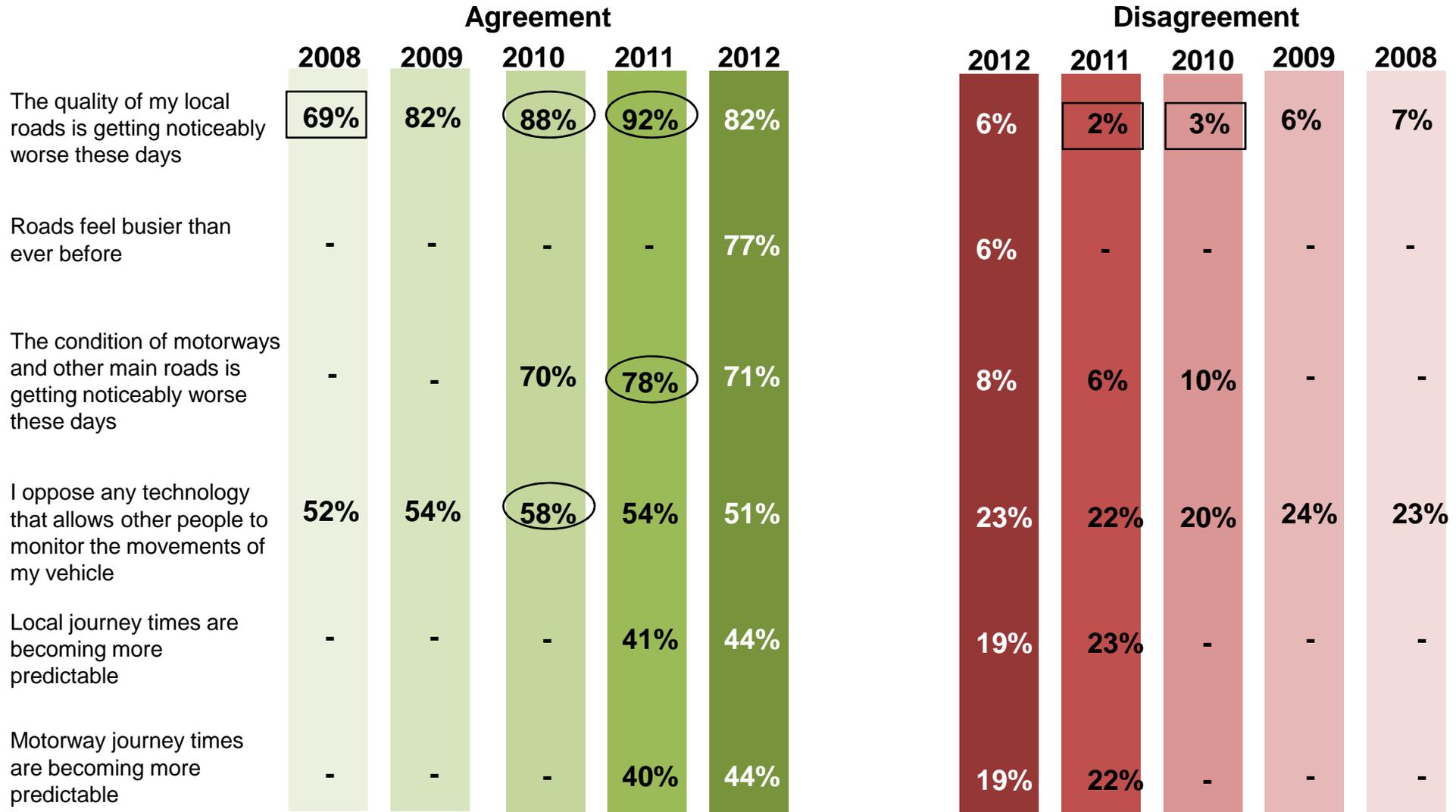
Issues that might be of concern to motorists.

Echoing the concerns of last year, motorists are most concerned about the cost of driving or owning a car. Preparation for adverse weather and traffic congestion are of lesser concern than last year.



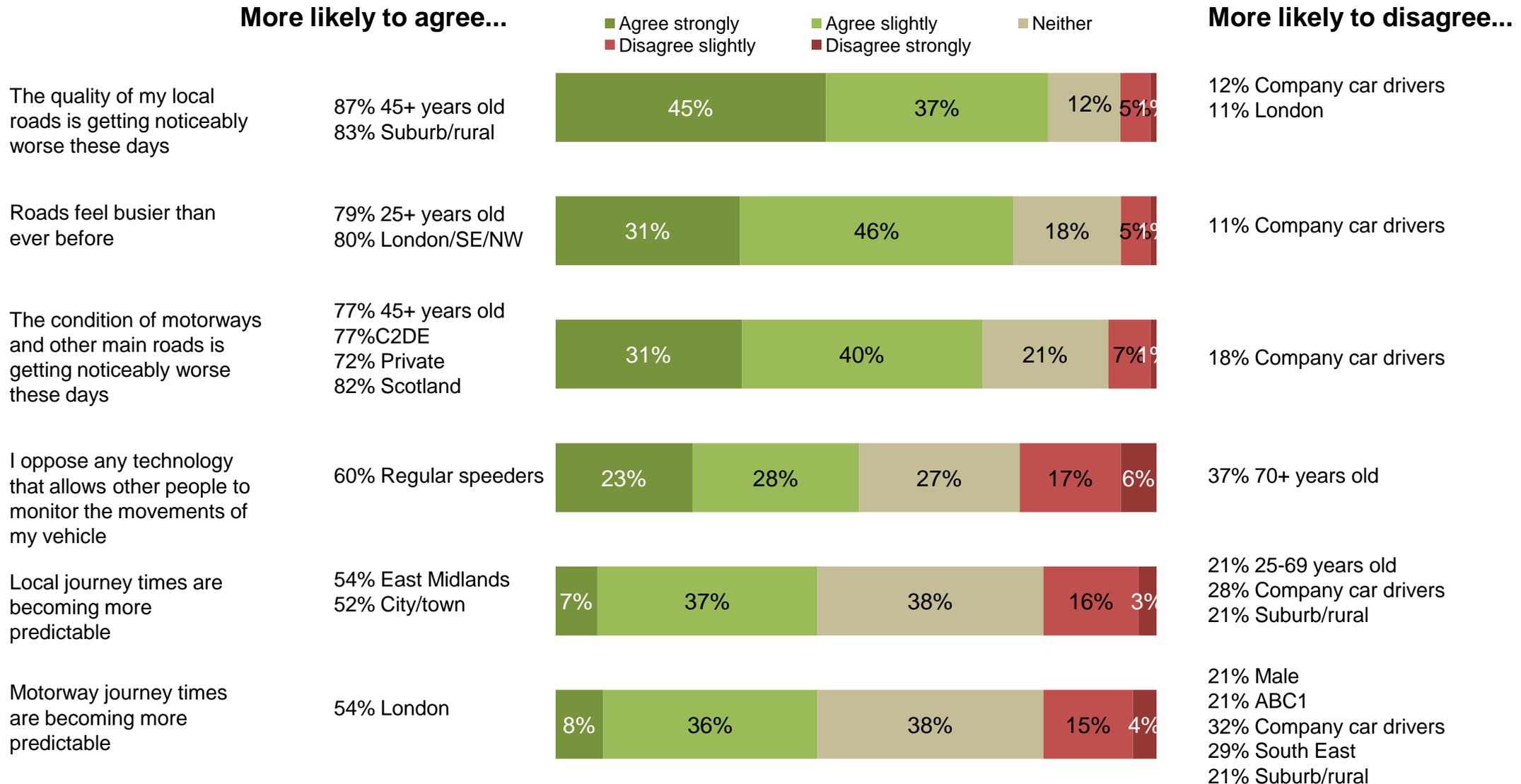
Views on motoring – general.

8 in 10 motorists believe their local roads are deteriorating, although the outlook is generally more positive than the past two years. Opposition to monitoring technology is at its lowest point and on par with 2008.



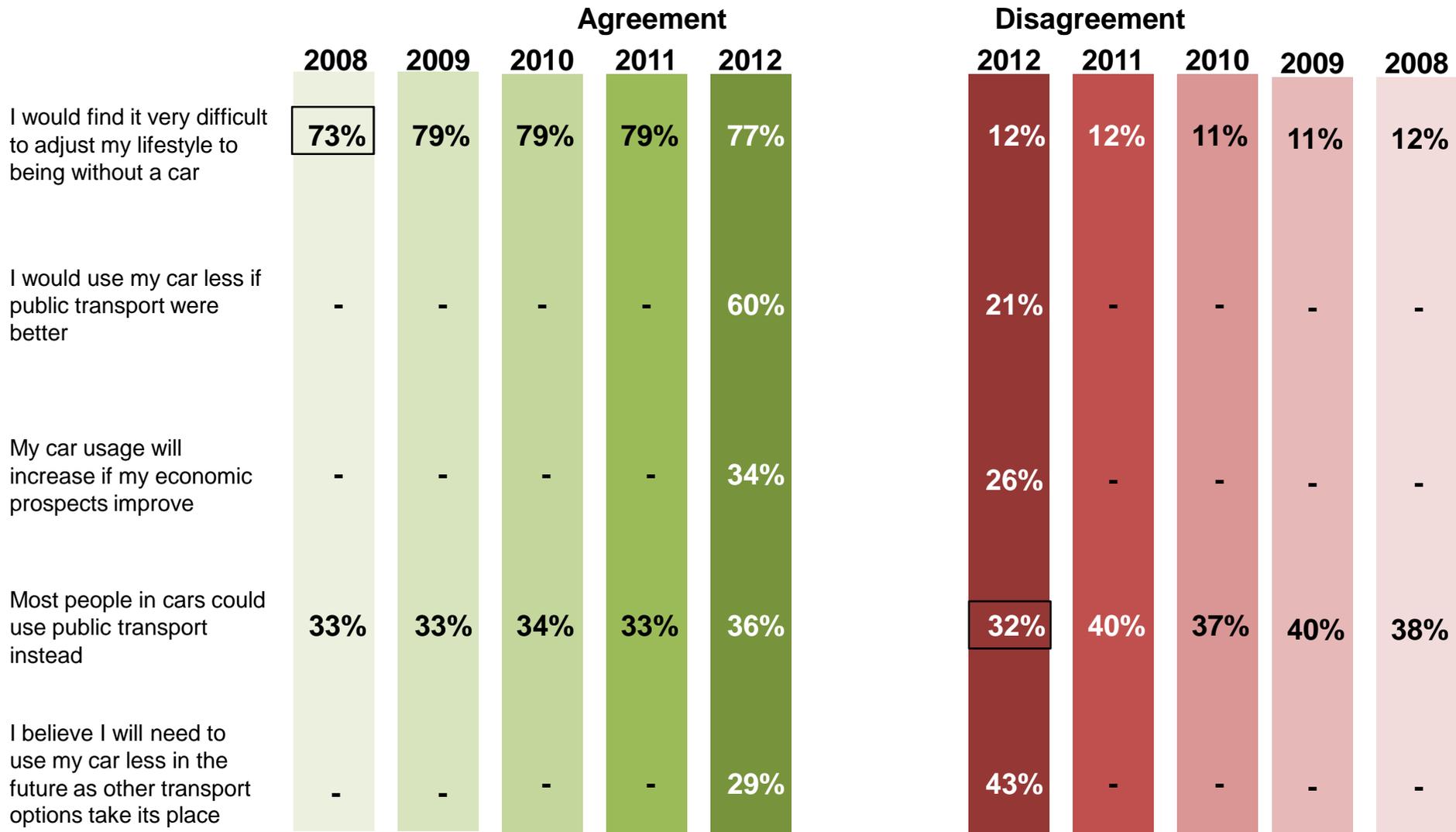
Views on motoring – general.

Company car drivers are more likely to disagree with deterioration of the roads (although most still do agree). Almost one-third of company car drivers disagree that journey times are more predictable.



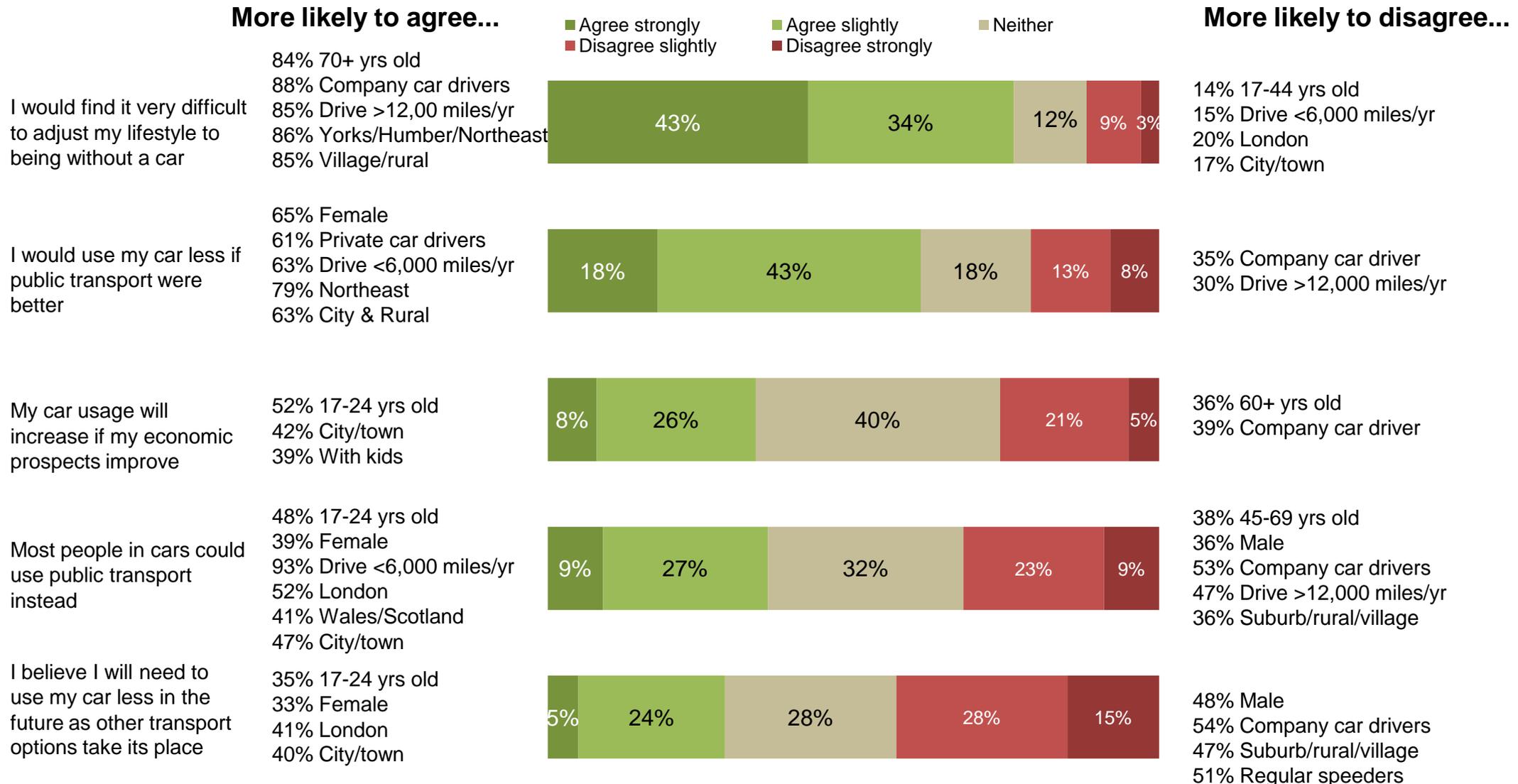
Views on motoring – me and my car.

Motorists continue to see their car as an integral part of their lives, with more than ¾ believing it would be difficult to adjust to a carless lifestyle. However, public transport is increasingly perceived as accessible.



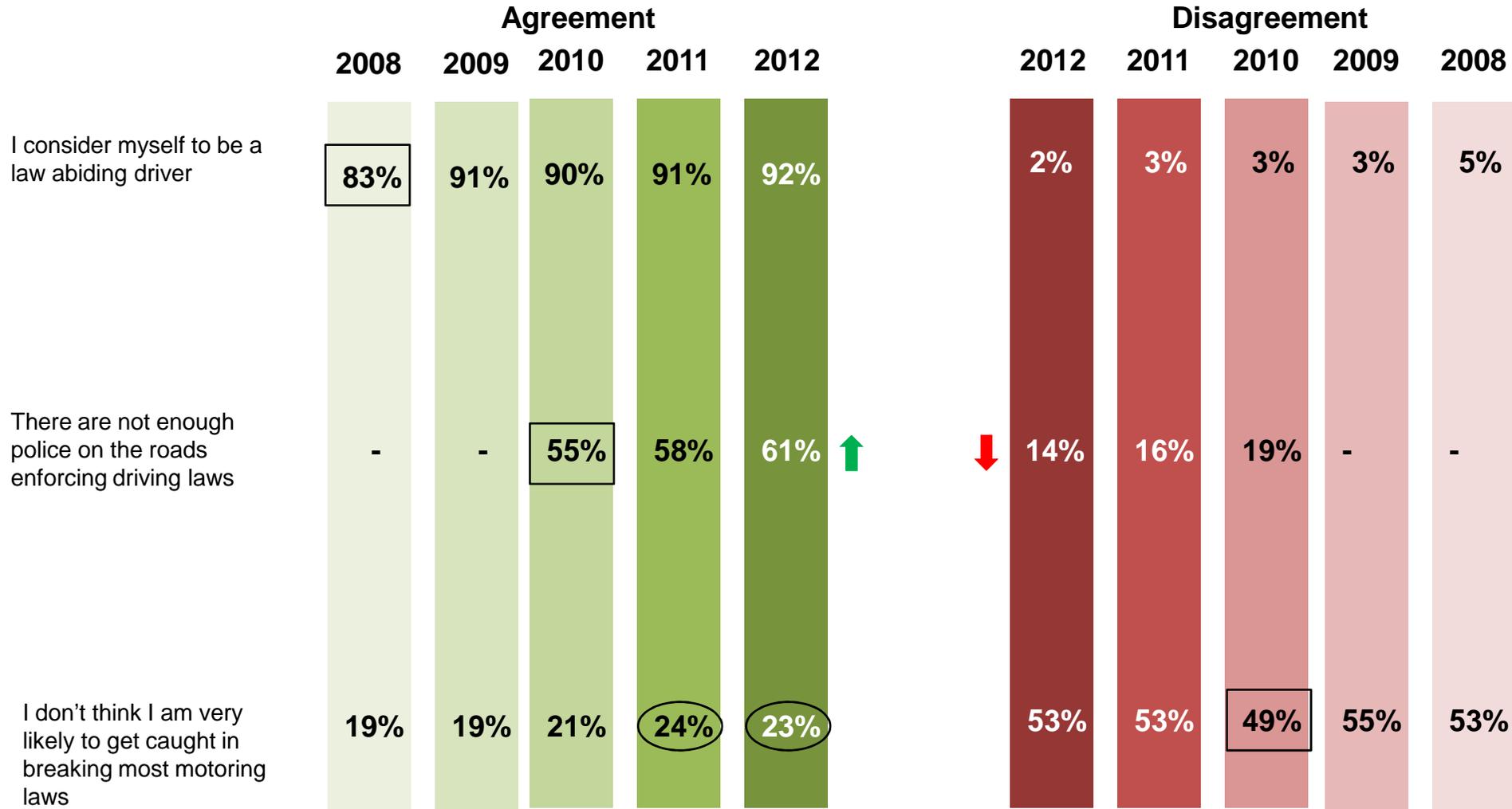
Views on motoring – me and my car.

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



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 now believe that there is a lack of police enforcing motoring laws compared to two years ago.



View on motoring – the law.

The majority of speeders agree that they could be caught and feel there are not enough police on the roads. They are also likely to agree that they are law abiding drivers – although not as strongly as others.

More likely to agree...

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

More likely to disagree...

I consider myself to be a law abiding driver

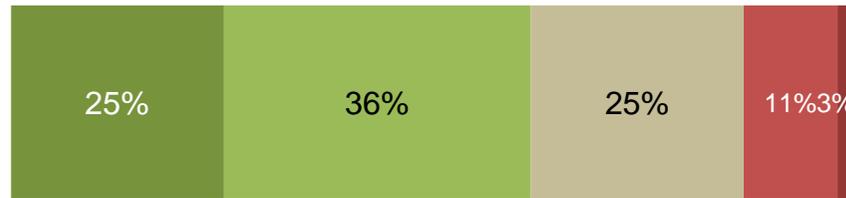
95% 45-70+ years old
 93% >12,000 miles/yr
 95% Occasional/non-speeders
 (83% Regular speeders)



7% Wales
 5% Regular speeders

There are not enough police on the roads enforcing driving laws

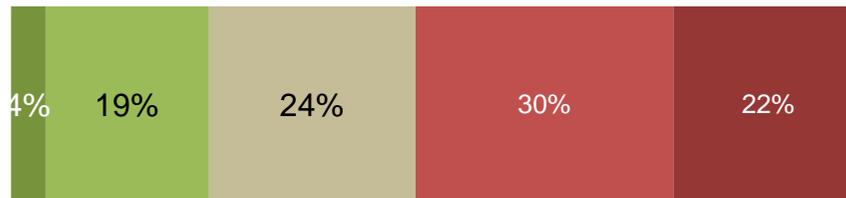
69% 45+ years old
 65% Male
 62% private ownership
 (50% regular speeders)



19% 17-24 years old
 24% company car
 18% 2+ cars
 24% regular speeders

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

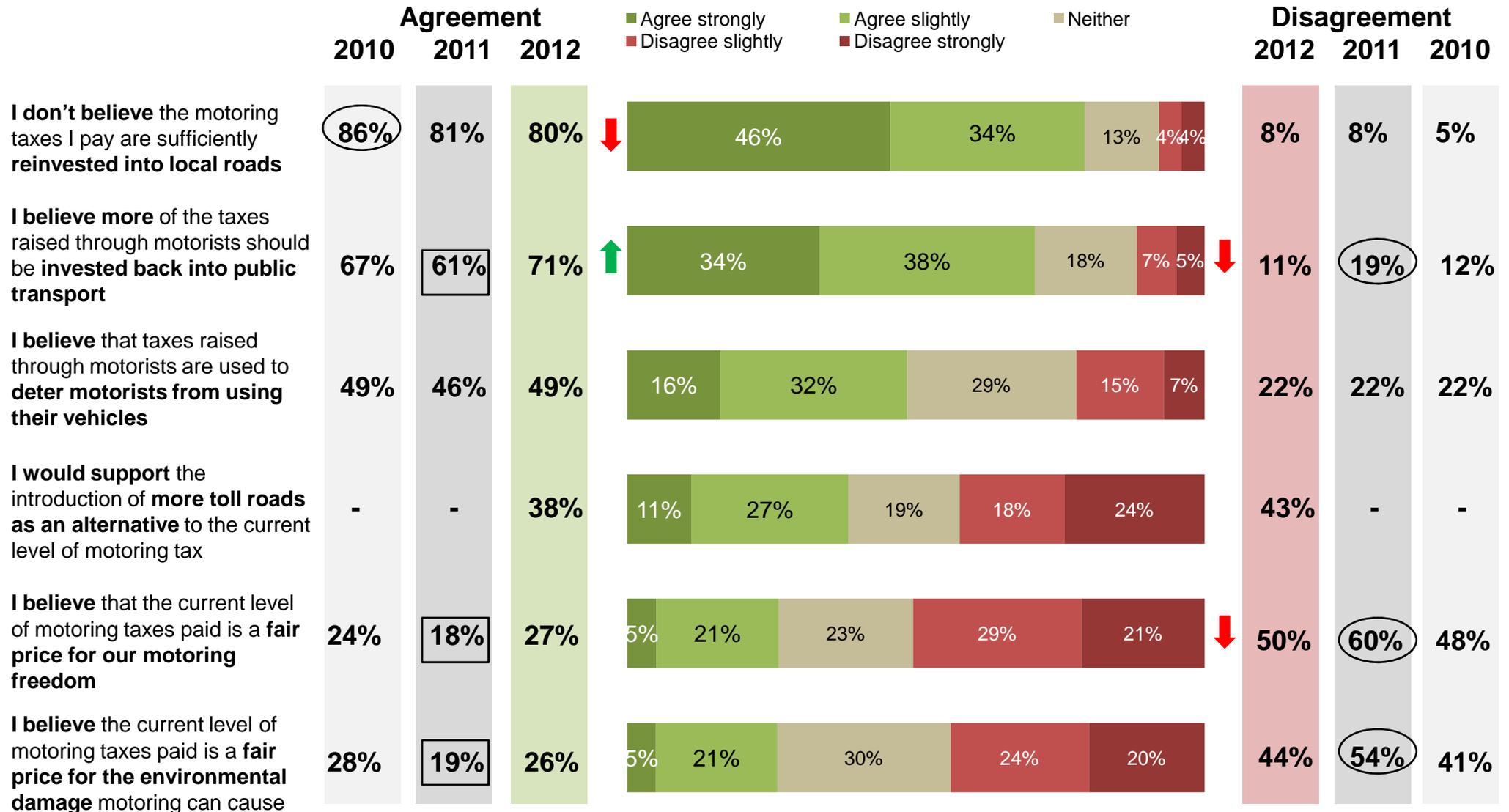
28% Male
 32% Regular speeders
 22% Occasional speeders



59% Female
 52% Occasional speeder
 62% Non-speeder
 (45% Regular speeder)

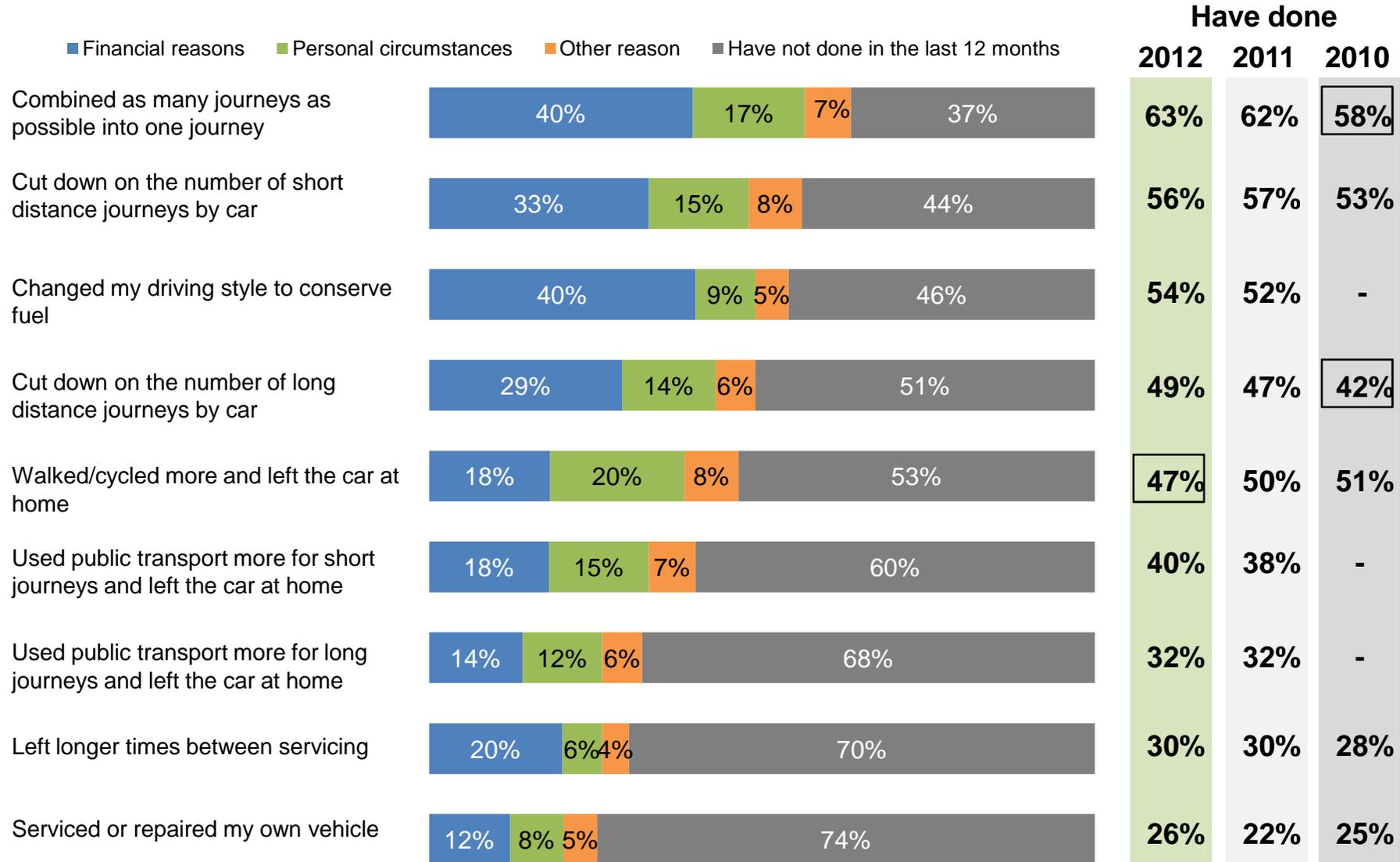
Spending motoring taxes.

Reinvestment of taxes into local roads continues to be a priority and support for investment into public transport is on the increase. 2011 saw the highest levels of disagreement regarding the 'fair price' of taxes which have returned to 2010 levels.



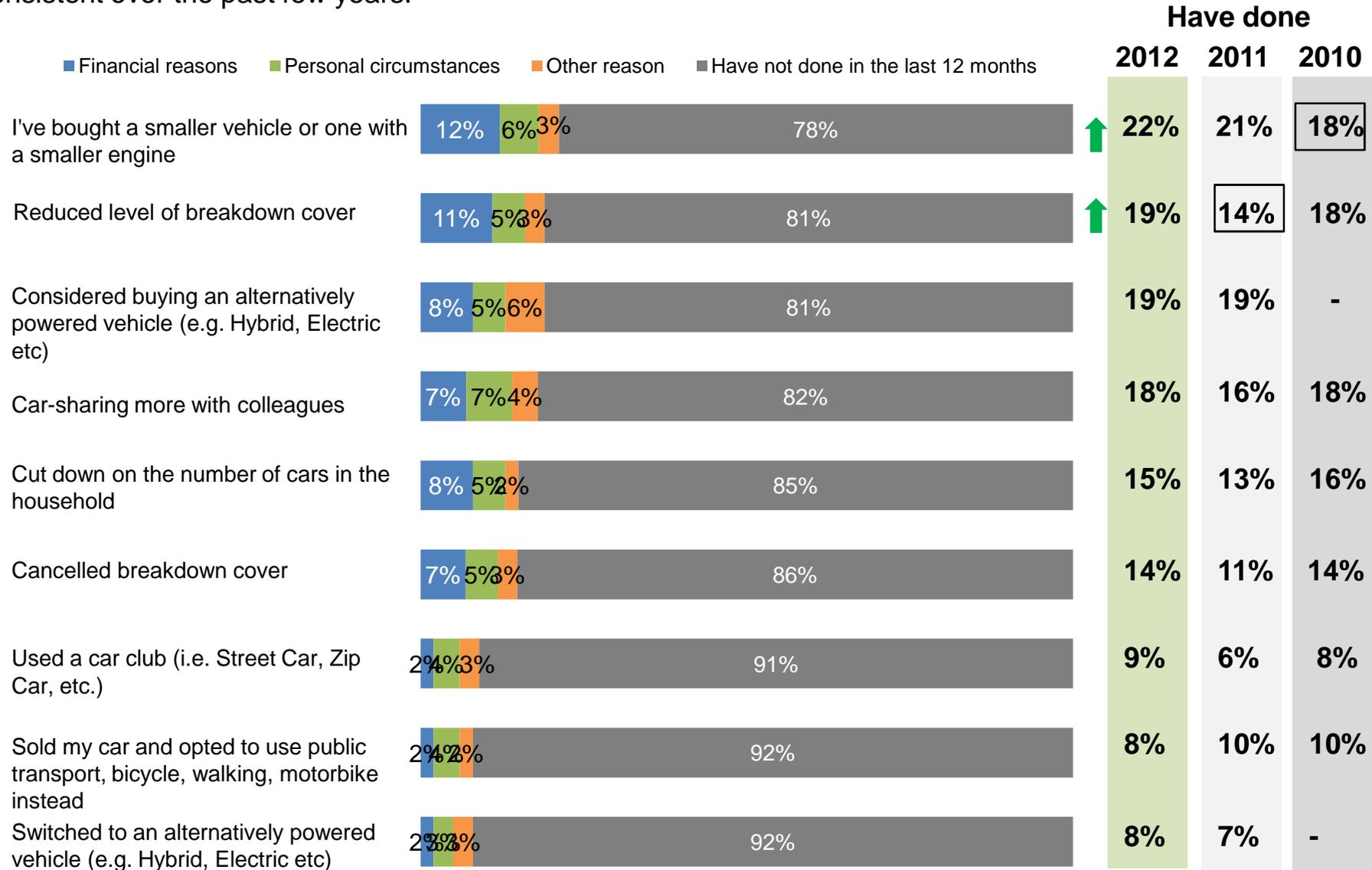
Behaviour over the last 12 months (1).

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.



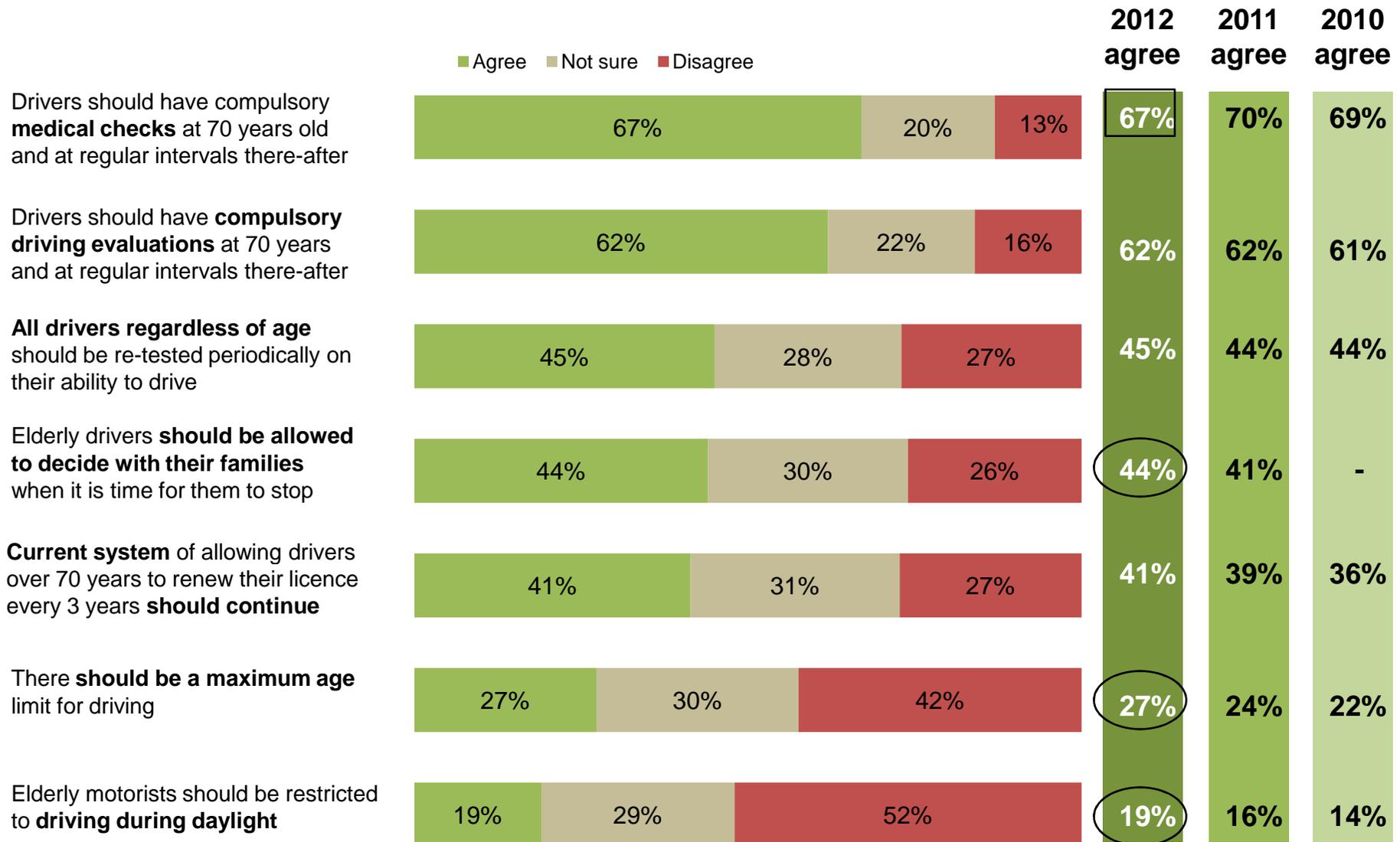
Behaviour over the last 12 months (2).

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



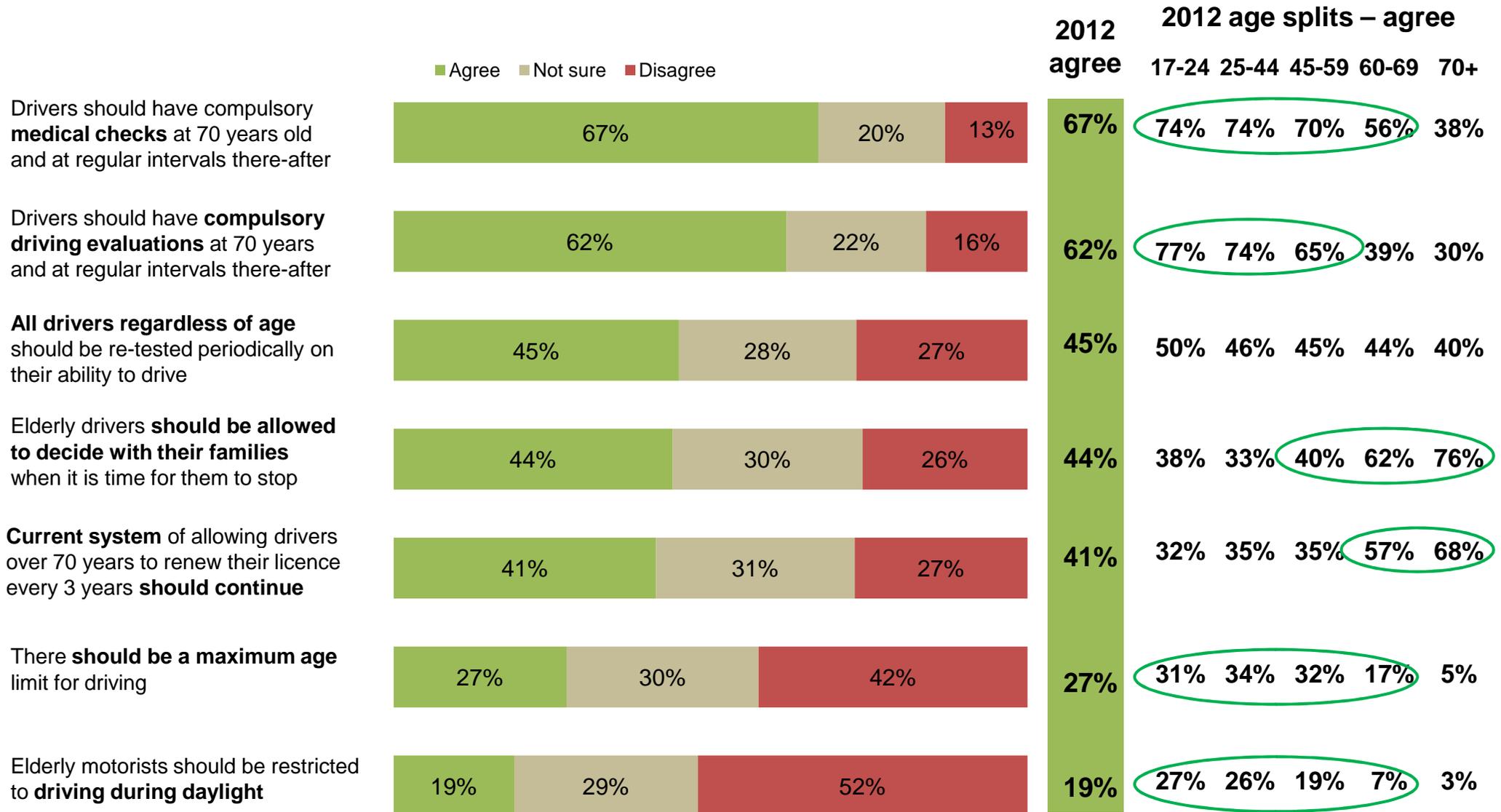
Older drivers.

No large changes have been seen over the past year but over the past three years, more feel there should be a maximum age for driving and that driving for the elderly should only be done during daylight.



Older drivers.

Opinions regarding older drivers remain relatively unchanged since last year, with medical checks being the preferred method of managing elderly motorists. As expected, these opinions are closely linked to the respondent's age.



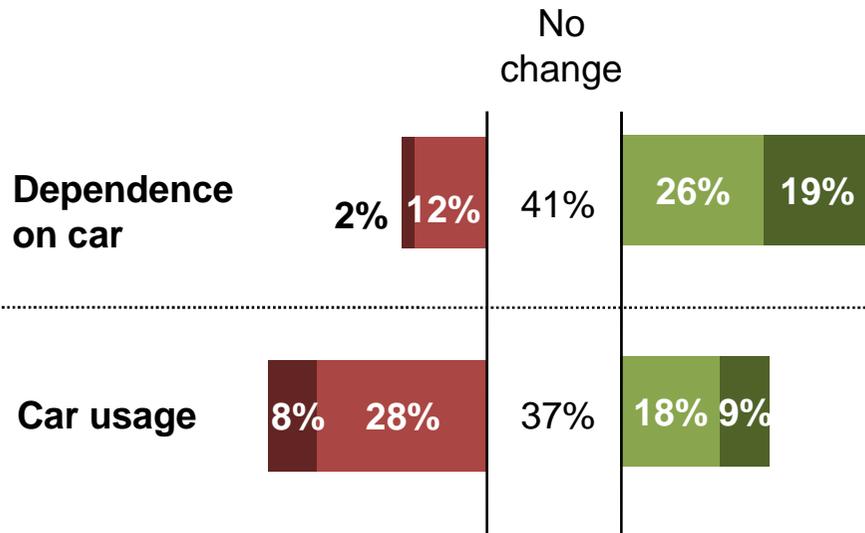


Peak car.

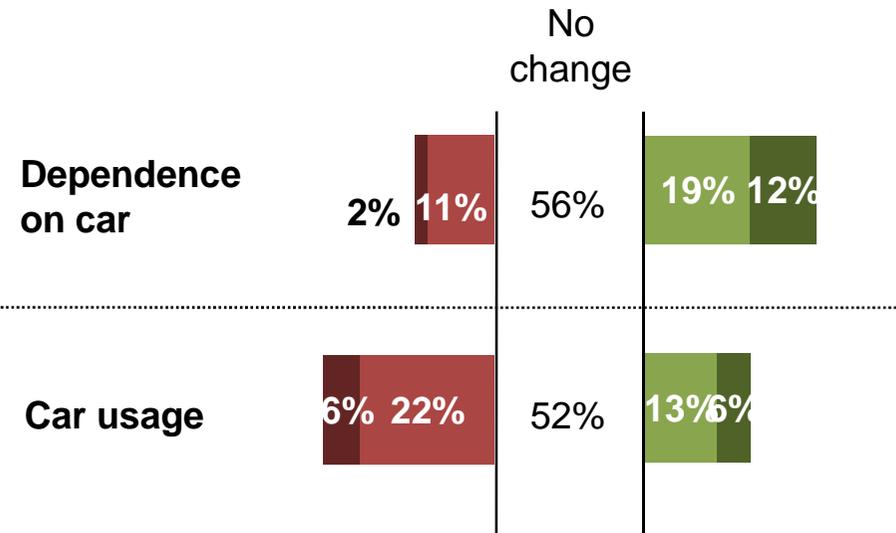
Car usage and dependence.

Motorists feel they are using their cars less – both compared to 5 years ago and one year ago. However, they are also likely to feel more dependent on their cars, especially those with children. Looking across a period of five years shows greater perceived behaviour change.

Perceived dependence compared to five years ago...

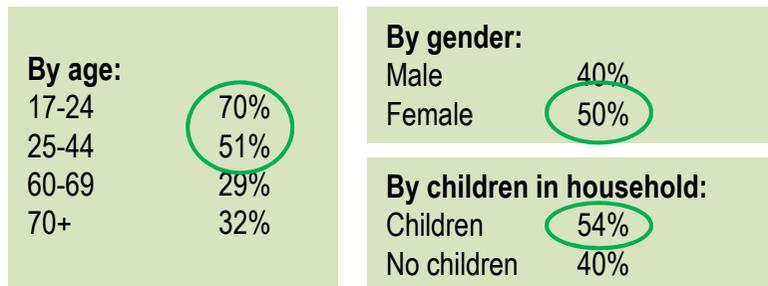


Perceived dependence compared to one year ago...



■ Less ■ More
 ■ Much less ■ Much more

Most likely to be more dependent:

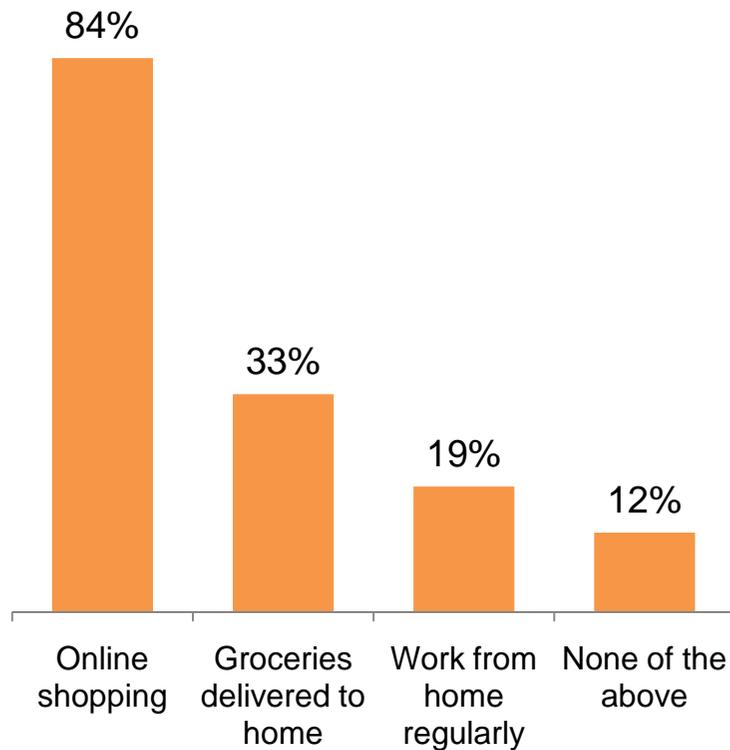


Question was asked of different time periods

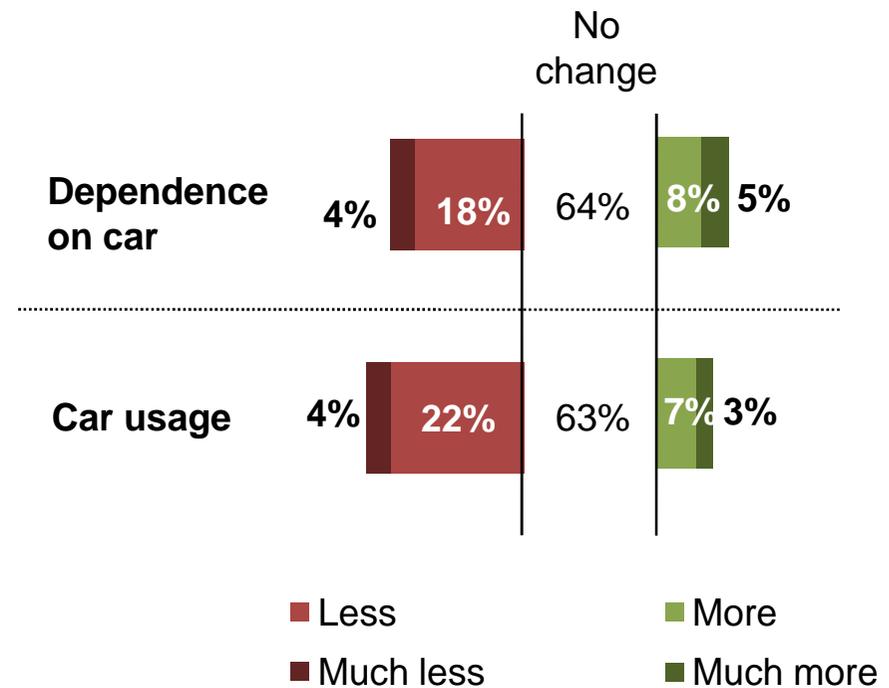
Activities that affect car use.

The vast majority have shopped online and approximately one-quarter of motorists feel this has reduced their dependence on or usage of their car – the majority (almost two-thirds) say it has not changed their motoring behaviour.

Activities in the last 12 months

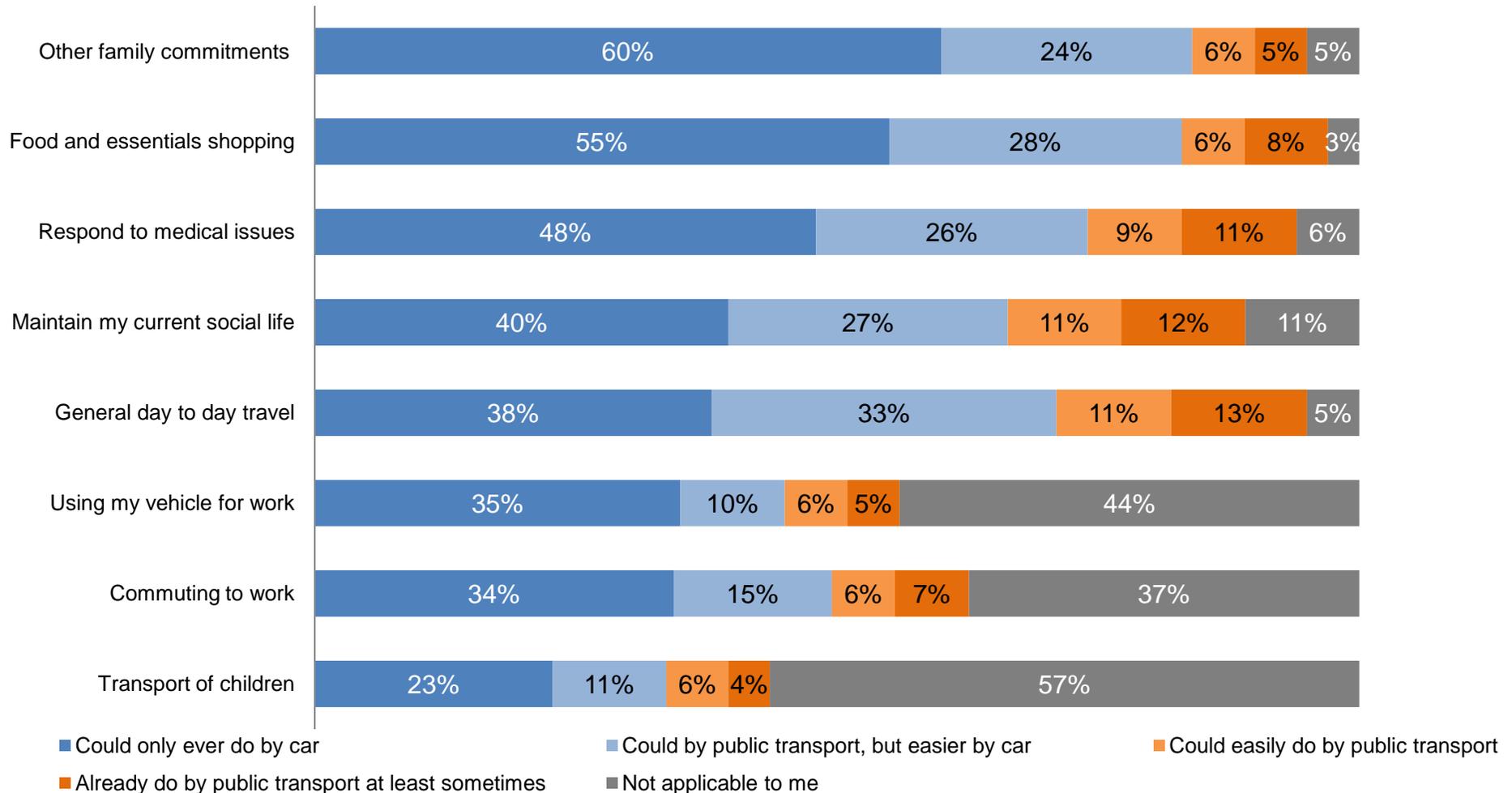


Effect of activities on car dependence and usage



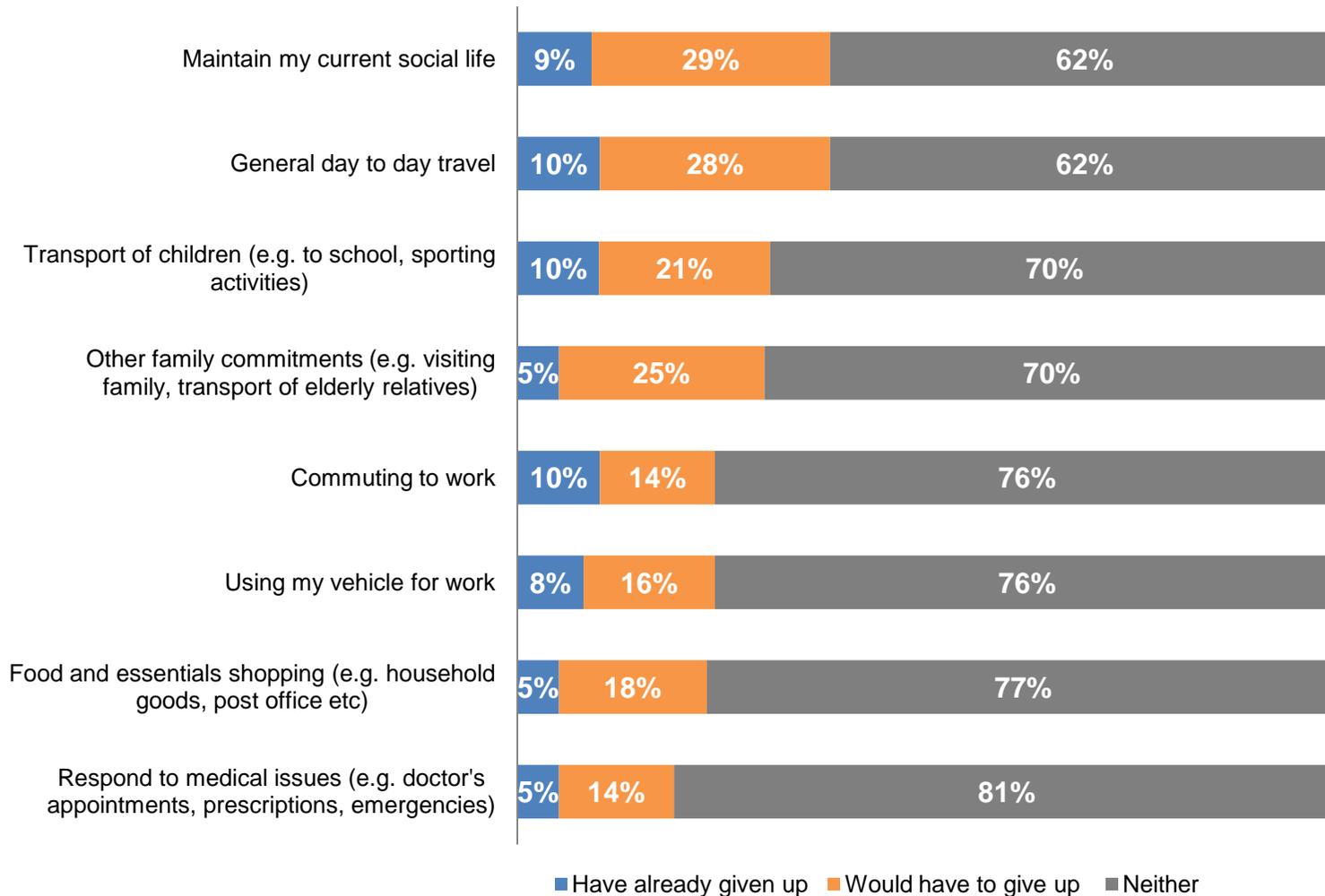
Car dependency by activity.

The potential for using public transport is highest for day-to-day travel and socialising, but it is almost inconceivable for activities such as responding quickly to medical issues or carrying heavy shopping. Rural motorists are more likely to need their vehicle for all activities and suburban motorists for many.



Impact of rising cost of motoring.

Unsurprisingly, this is also reflected in the activities motorists say they have given up because of the cost of motoring – activities that are seen as most feasible to do via public transport are those that are most likely to be abandoned by car. Londoners are more likely to have given up all activities.



Reducing number of cars in household.

Motorists' continued dependence on their cars is reflected in attitudes towards reducing the number of cars in their households – over half are not willing to even consider it.

Those unable to reduce the no. of cars in their household

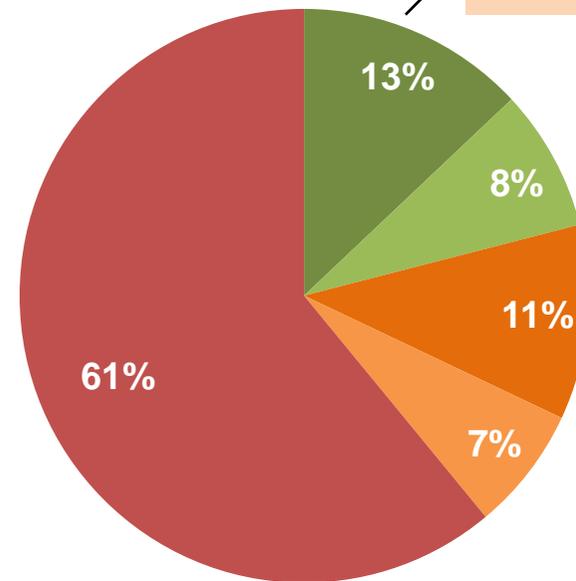
By age:	
17-24	53%
25-44	56%
45-64	69%
65-69	64%
70+	65%

By SEG:	
ABC1	55%
C2DE	68%

By years driving:	
<10 years	52%
10-20 years	58%
20-40 years	66%
40+ years	64%

By cars in household:	
1	68%
2+	50%

By cars in household:	
1	18%
2+	6%

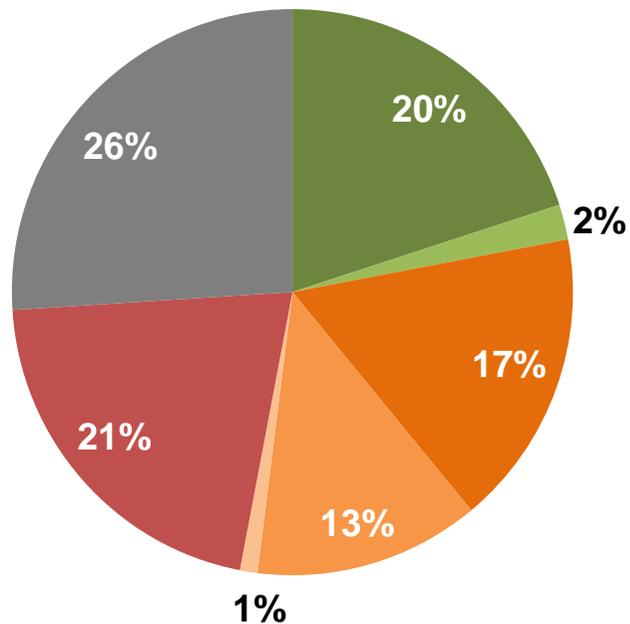


- Have already reduced no. of cars
- Could reduce no. of cars - am thinking of doing so
- Could reduce no. of cars - not planning on it
- Could reduce no. of cars - if public transport improved
- Could not reduce no. of cars

Buying a first car.

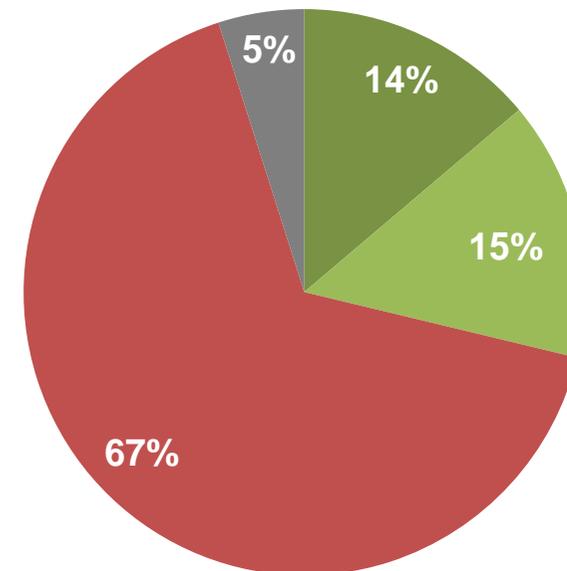
Parental contribution to the purchase of a first car appears to be increasingly expected – with more than half of parents today at least considering it, even though two-thirds did not have help in buying their own first car.

Do you plan to buy or help pay for your children's first car once they pass their test?



- Yes, I plan to
- I originally didn't plan to, but intend to do so now
- I originally planned to, but am not sure I can afford this
- I want to, but the cost of insurance will likely be too high
- I want to, but the cost of fuel will likely be too high
- No, I do not plan to
- I haven't thought about it

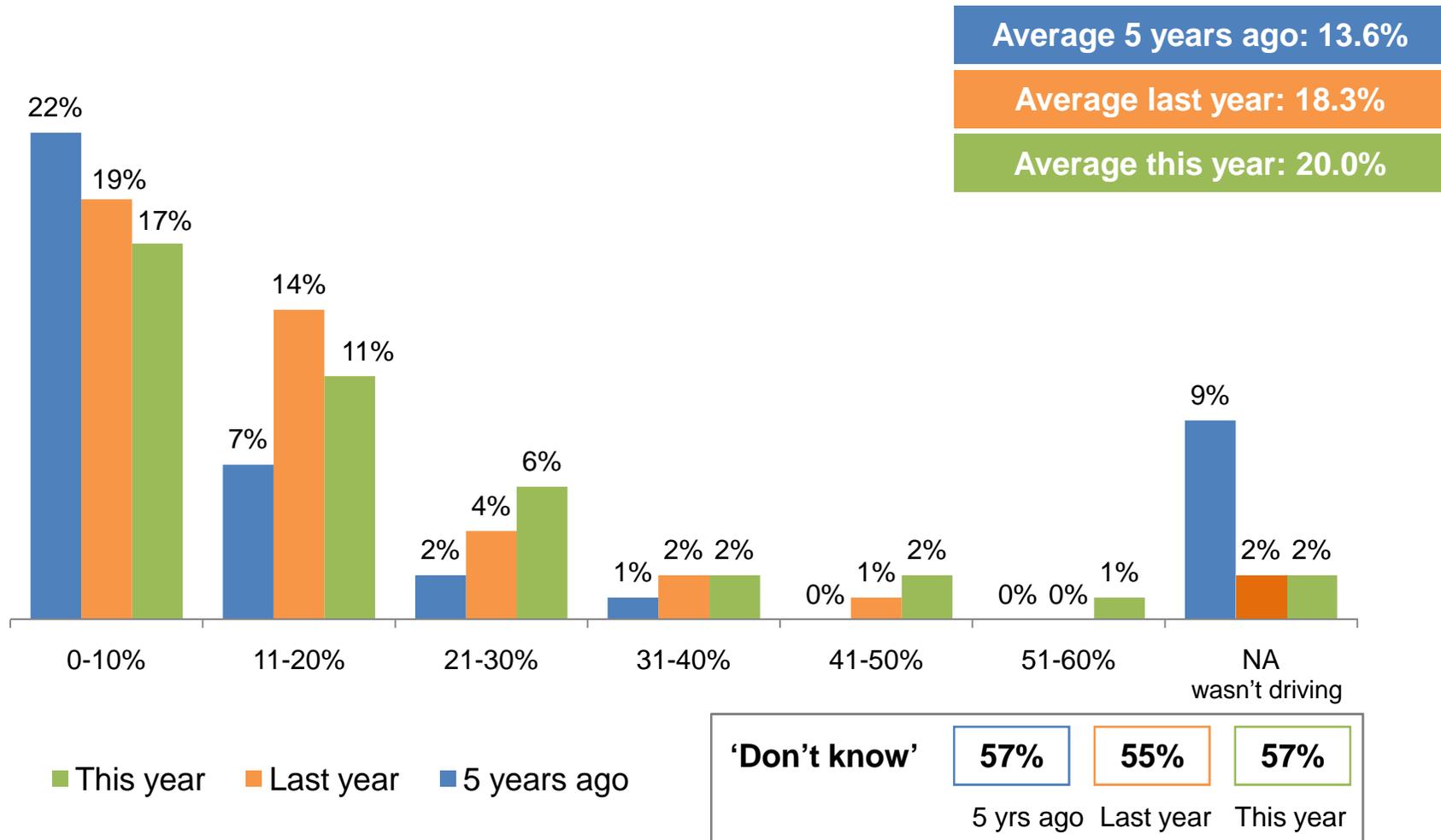
Did your parents buy your first car?



- Yes
- They contributed towards the purchase
- No
- Other situation

Proportion of income spent on running car.

The majority of motorists are unable to estimate how much of their income goes towards running their cars. Of those who do, they believe they are spending increasingly more of their income on motoring. However, as this question is based on recalled experience, this may reflect higher living costs in general, rather than motoring costs specifically.



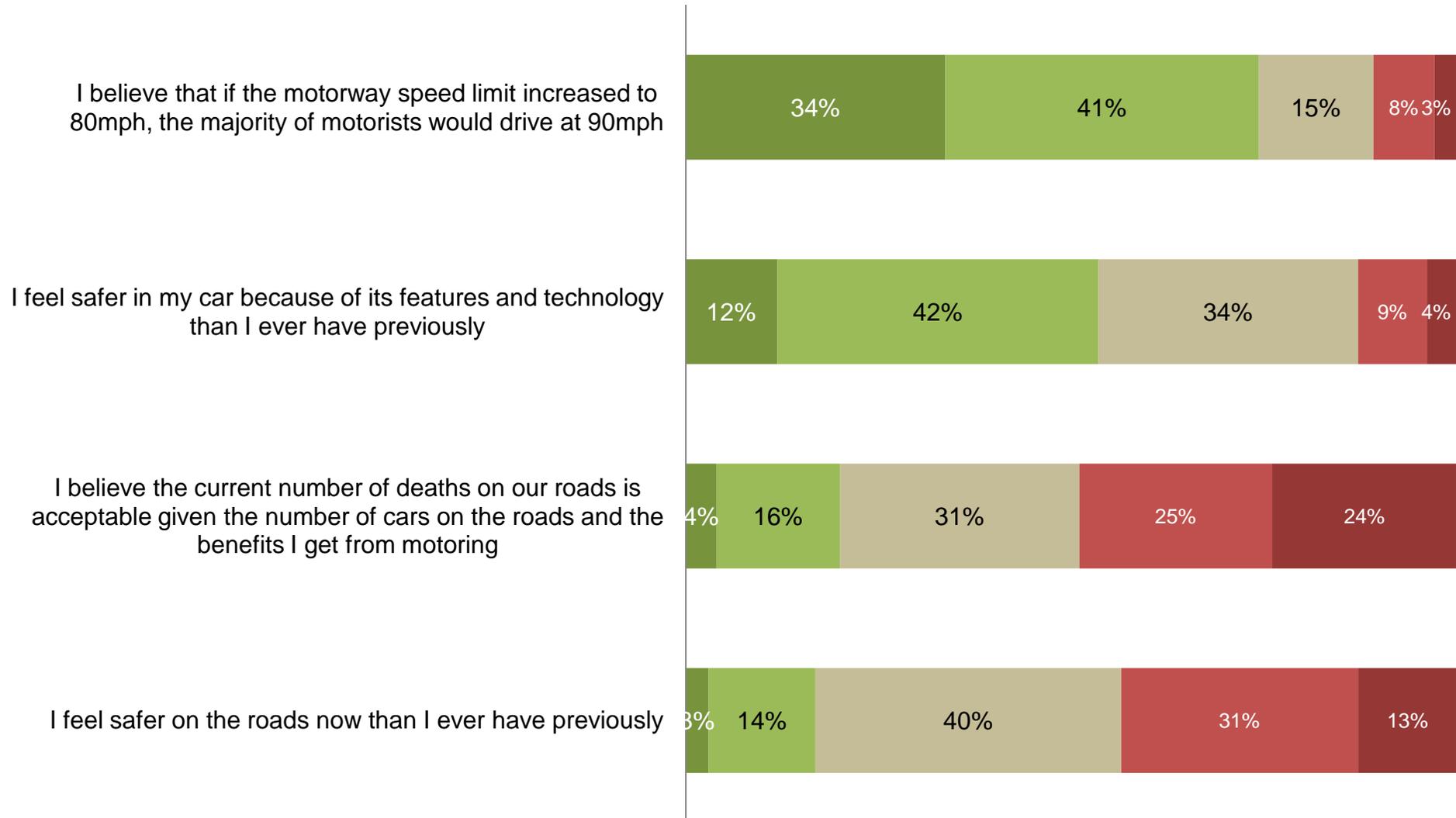


Safety on the road.

General views on road safety.

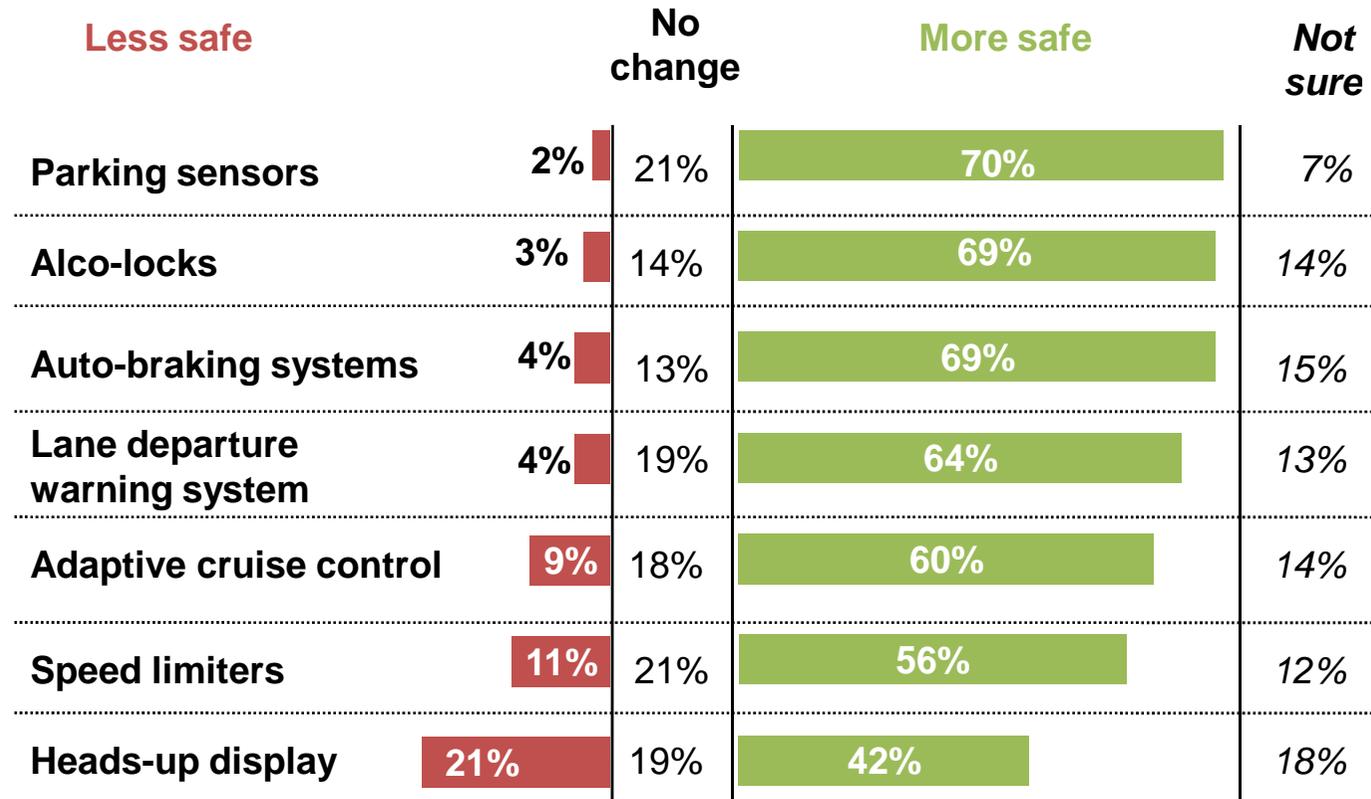
Motorists are less likely to say they feel safer on the roads now than ever before, despite feeling comforted by new technological features. 7 in 10 believe motorists see the speed limit as 'a rule to be broken' (63% admit speeding on the motorway).

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



Safety technology.

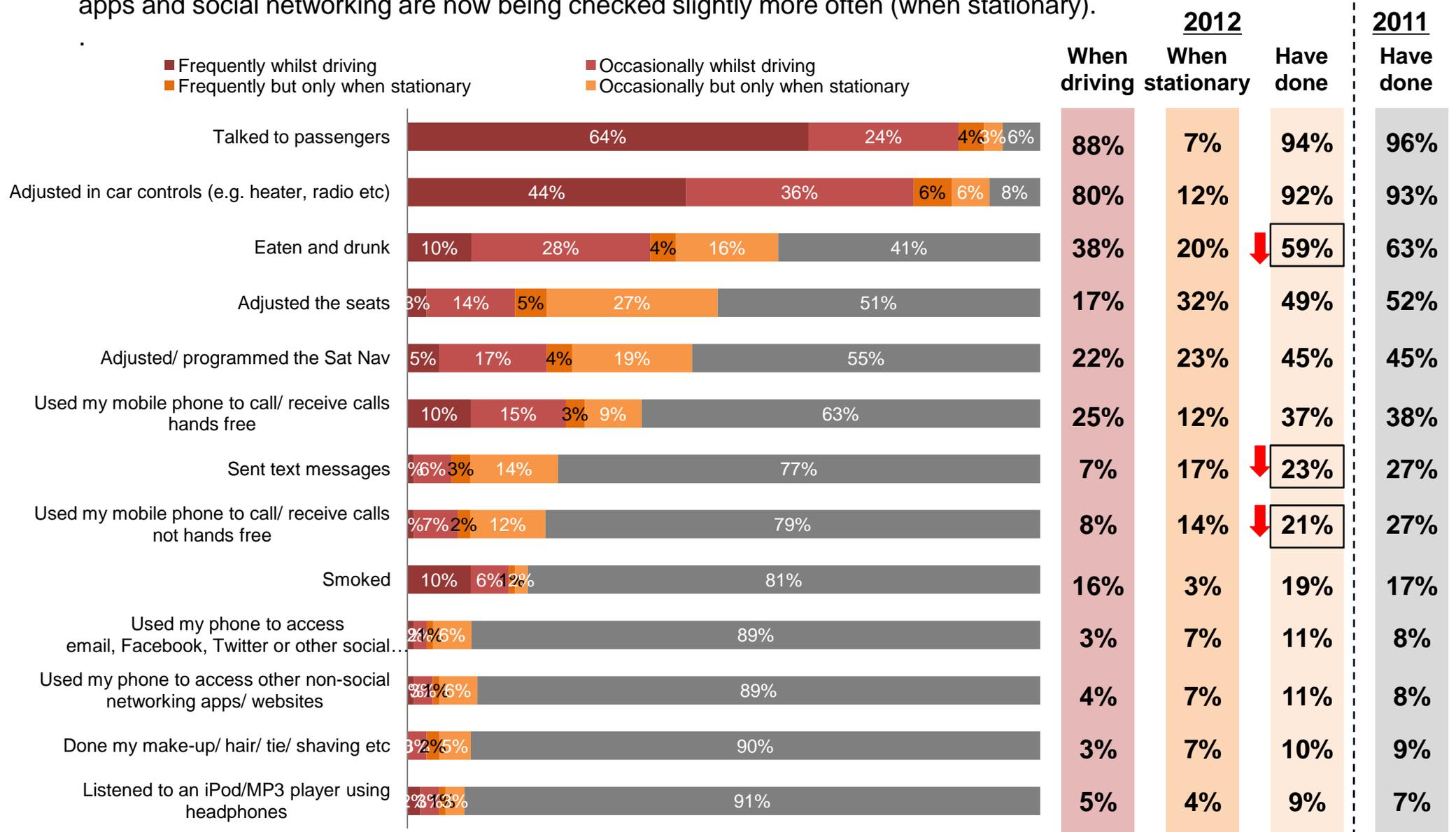
All proposed safety mechanisms are believed to make motoring safer, especially parking sensors, alco-locks and auto-braking systems.



Age of current car does not impact impressions of safety except for heads up display where those with a car 5+ years old feel it is unsafe more often (26% vs. 17%)

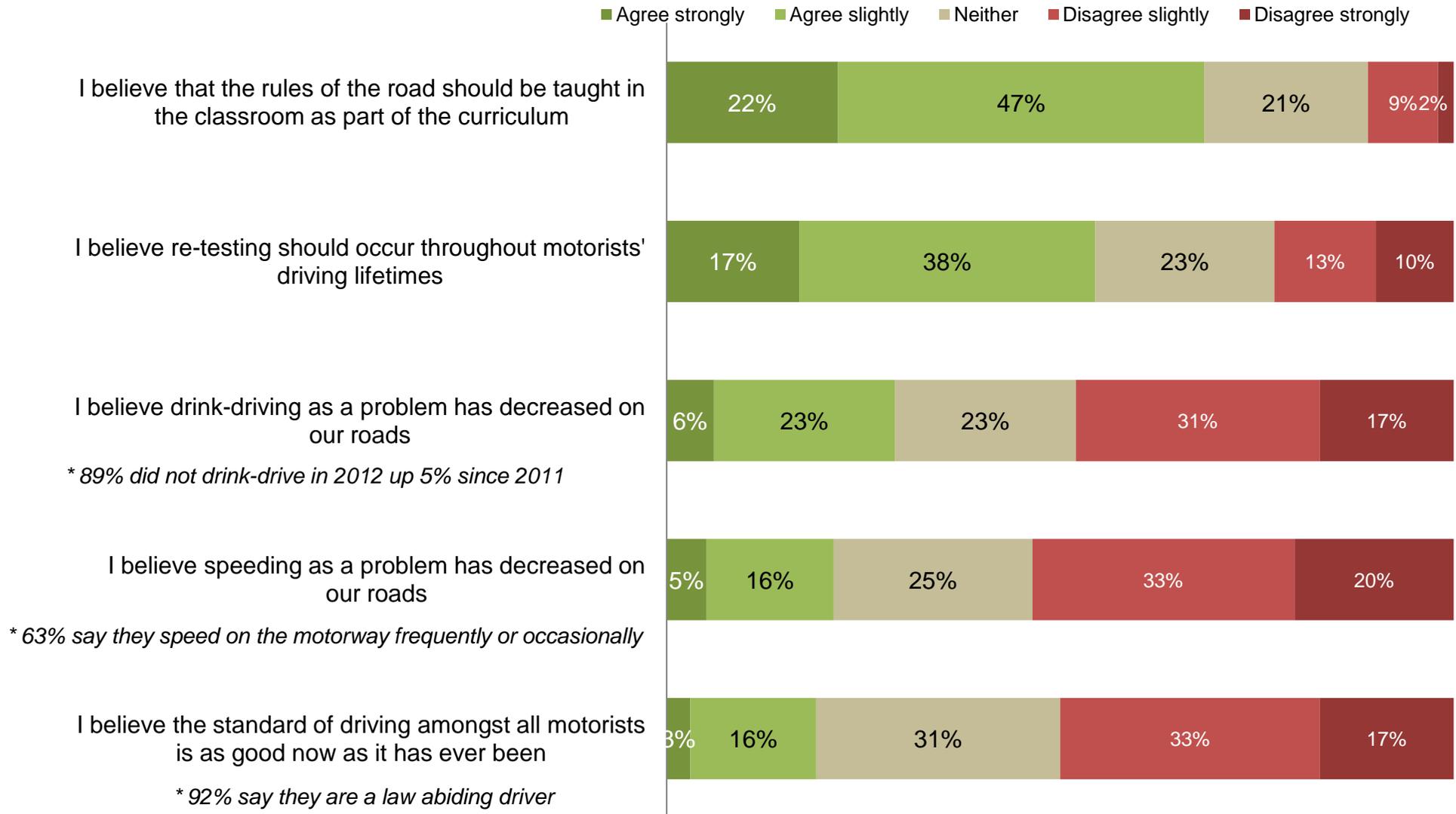
Driving distractions.

Motorists are less likely to take a phone call not hands-free and send text messages compared to 2011. However, apps and social networking are now being checked slightly more often (when stationary).



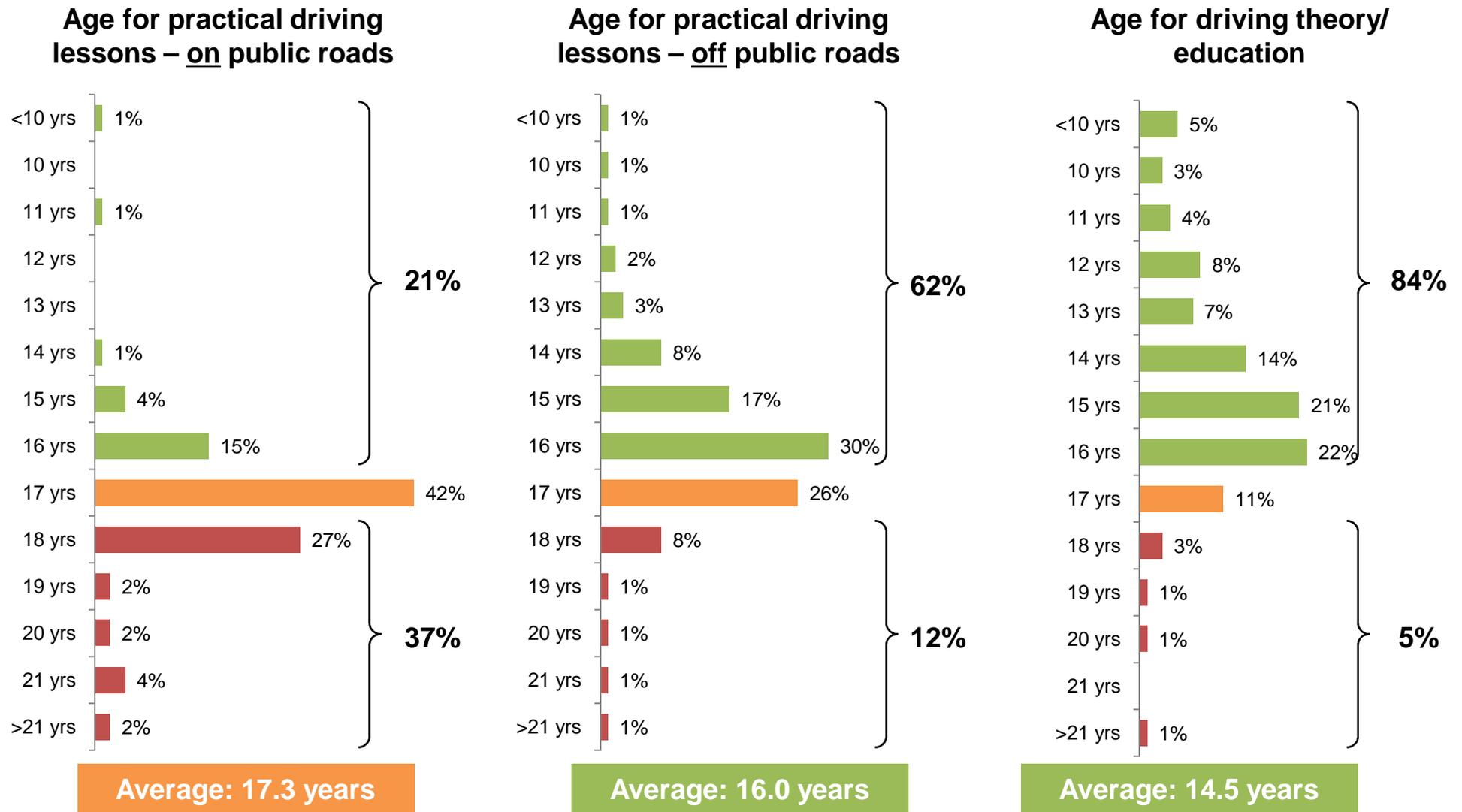
Road safety and education.

More rigorous driving education is welcomed by most, but typically in areas where they would be unaffected – 'lifetime re-testing' is supported by younger drivers and 'driving on the curriculum' is encouraged by older drivers. Motorists' perceptions of drink-driving and driving standards do not necessarily reflect behaviour on the road.



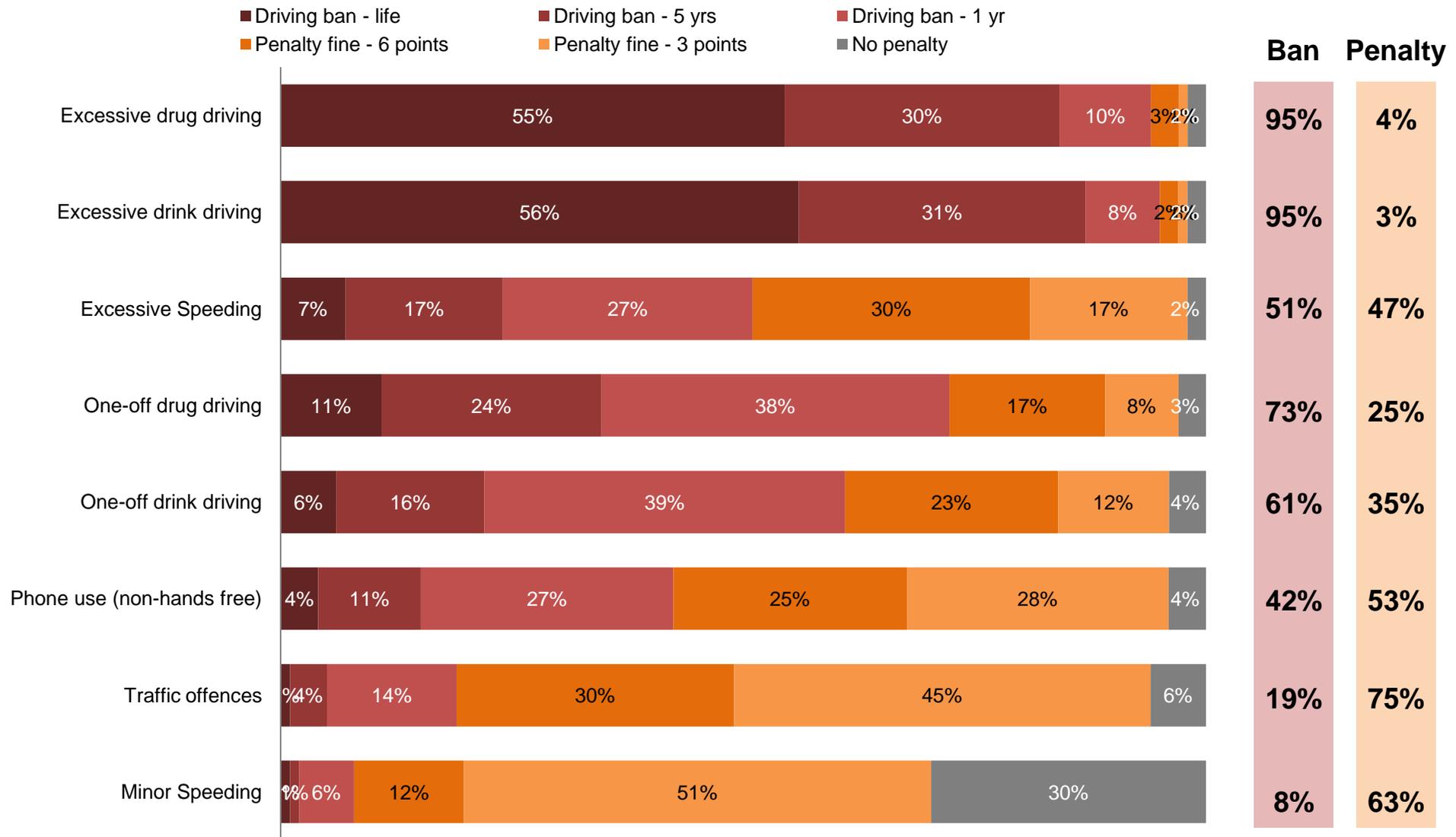
Learning to drive.

Generally speaking, there is support for lowering the age of driving education away from public roads. This view tends to be location-led, with Londoners (typically less dependent on cars) preferring a higher age limit instead.



Punishment for motoring offences.

The vast majority would punish excessive drug- or drink-driving with a ban – unsurprisingly, those who admit to committing these offences would be more lenient.



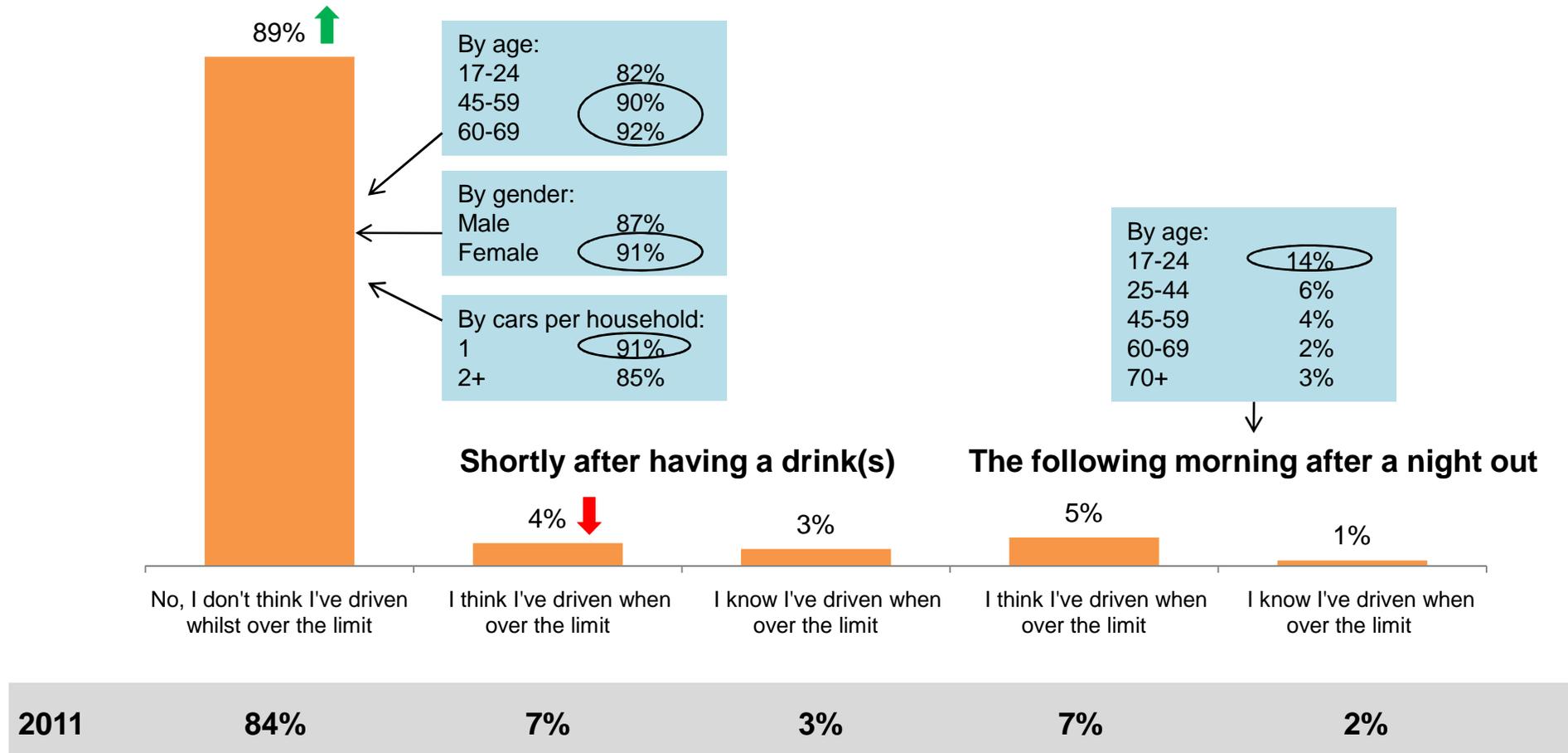


Driving under the influence.

Incidence of drink driving.

Fewer motorists than last year have driven whilst under the influence of alcohol. Those most likely to drink drive are young, male and have more than one car per household.

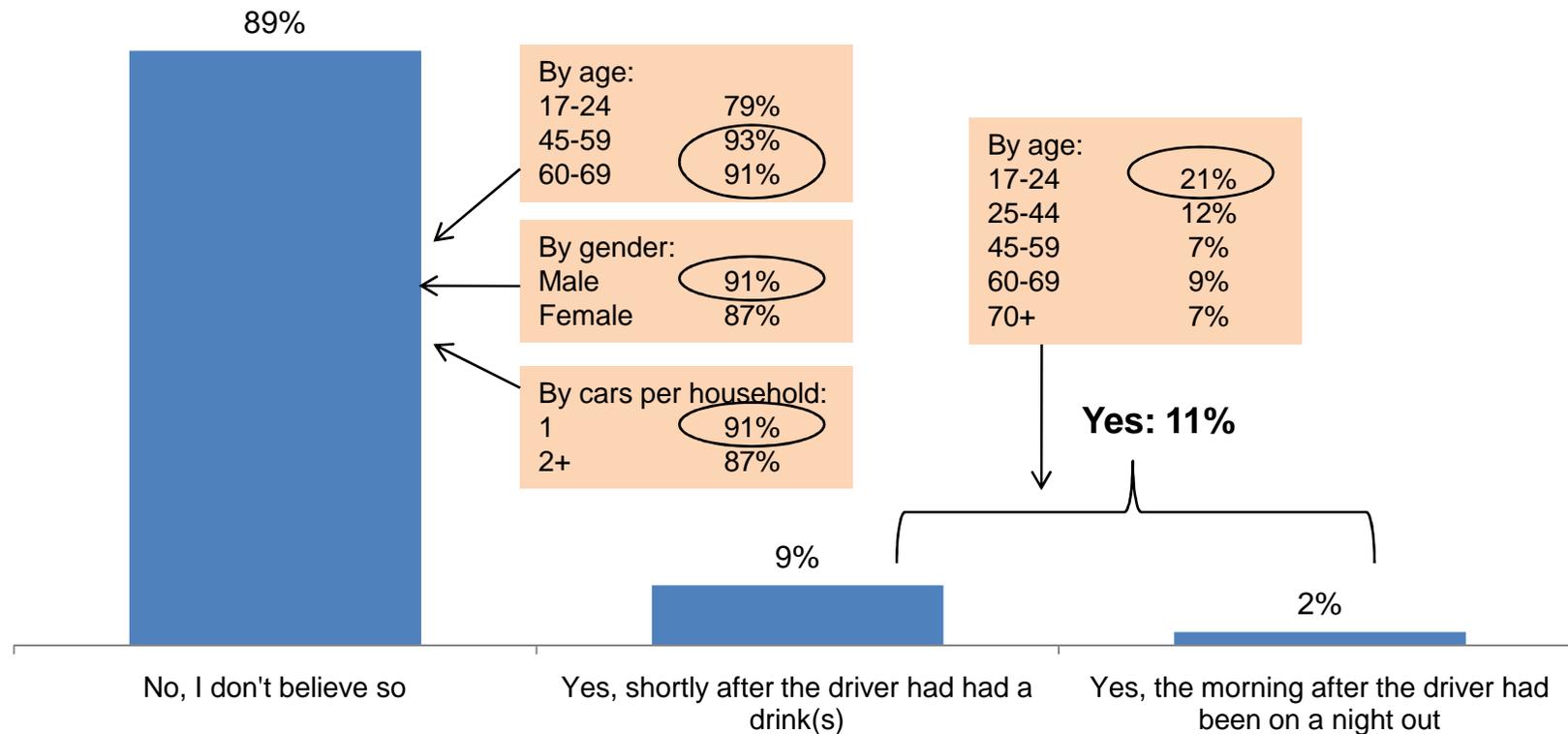
Have you ever driven when you believed you were above the drink drive limit?



Drink-drive passengers.

There is no significant difference in the proportion of 'drink-drive passengers' since last year. Women, younger drivers and those who drink-drive themselves are most likely to get into a car whose driver is above the limit.

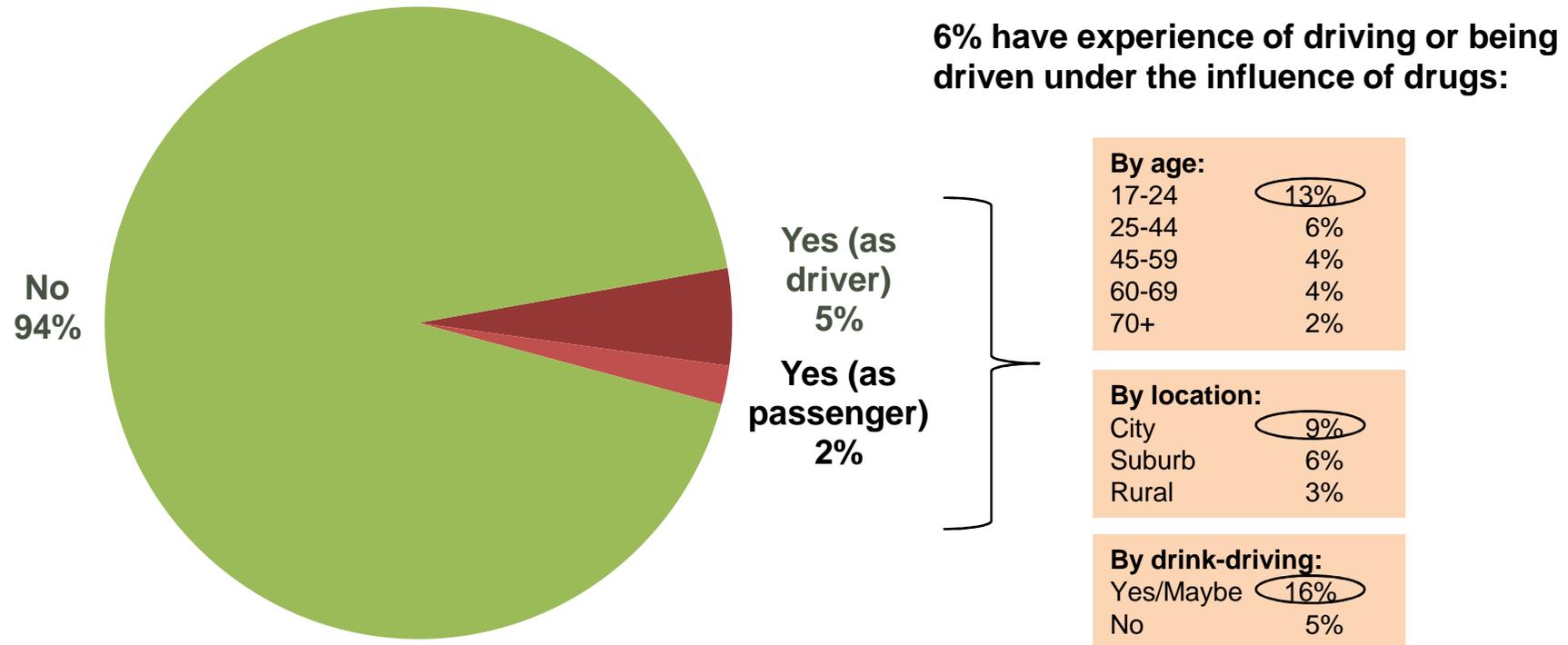
Have you ever been in a car when the driver was above the drink drive limit?



Year	No, I don't believe so	Yes, shortly after the driver had had a drink(s)	Yes, the morning after the driver had been on a night out
2011	89%	8%	4%

Driving under the influence of drugs.

1 in 20 motorists have experienced drug-driving (as a driver or passenger), but the prevalence is much higher amongst those aged 17-24 years (13%) and those who have driven under the influence of alcohol (16%).



2011	Yes (as driver) – 3%	Yes (as passenger) – 2%	No – 96%
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Speed limits.

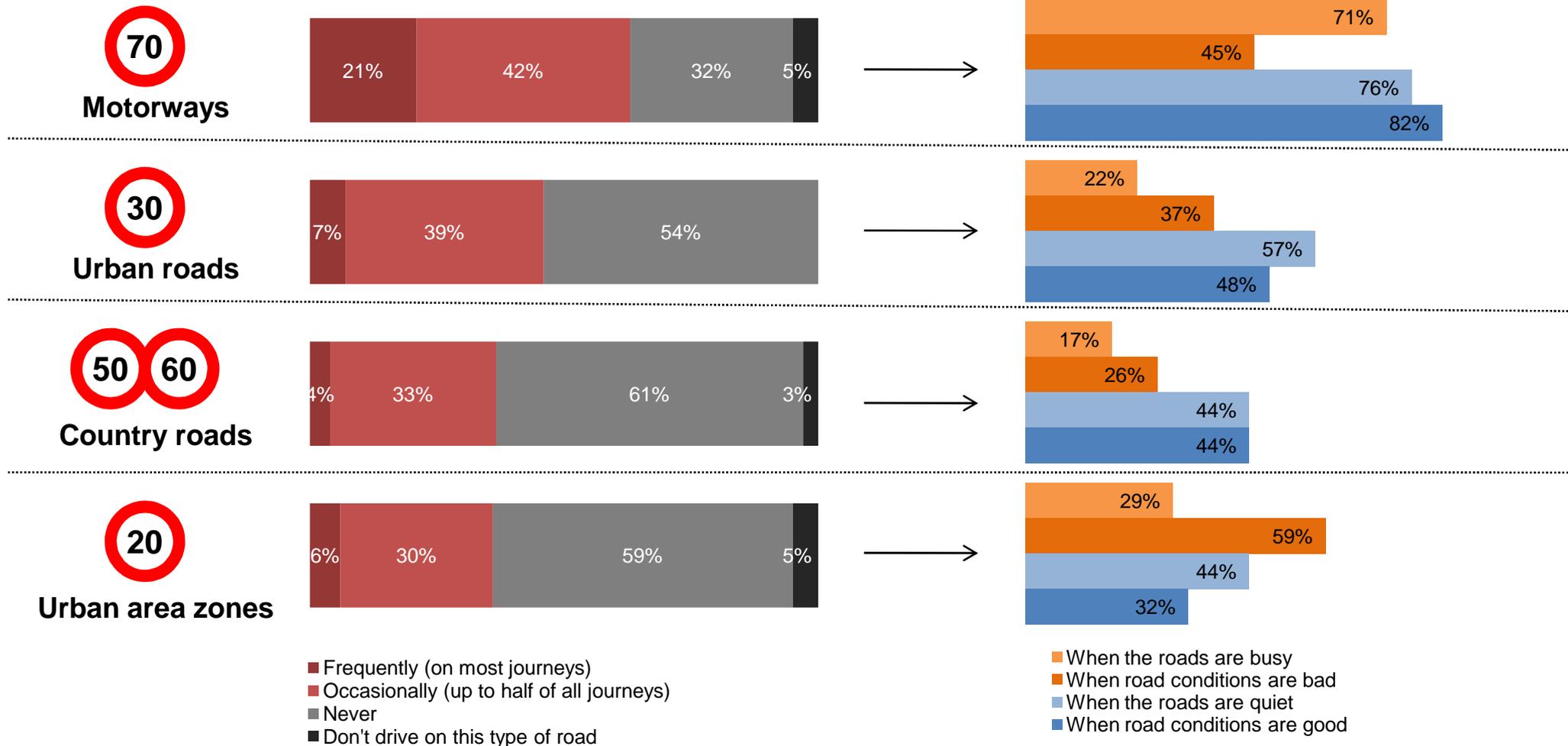
Breaking the speed limit.

Nearly two-thirds admit to speeding on motorways (the same proportion who believe that the speed limit on motorways should be raised), typically when roads are quiet or conditions are good.

* 7 in 10 believe motorists see the speed limit as 'a rule to be broken'.

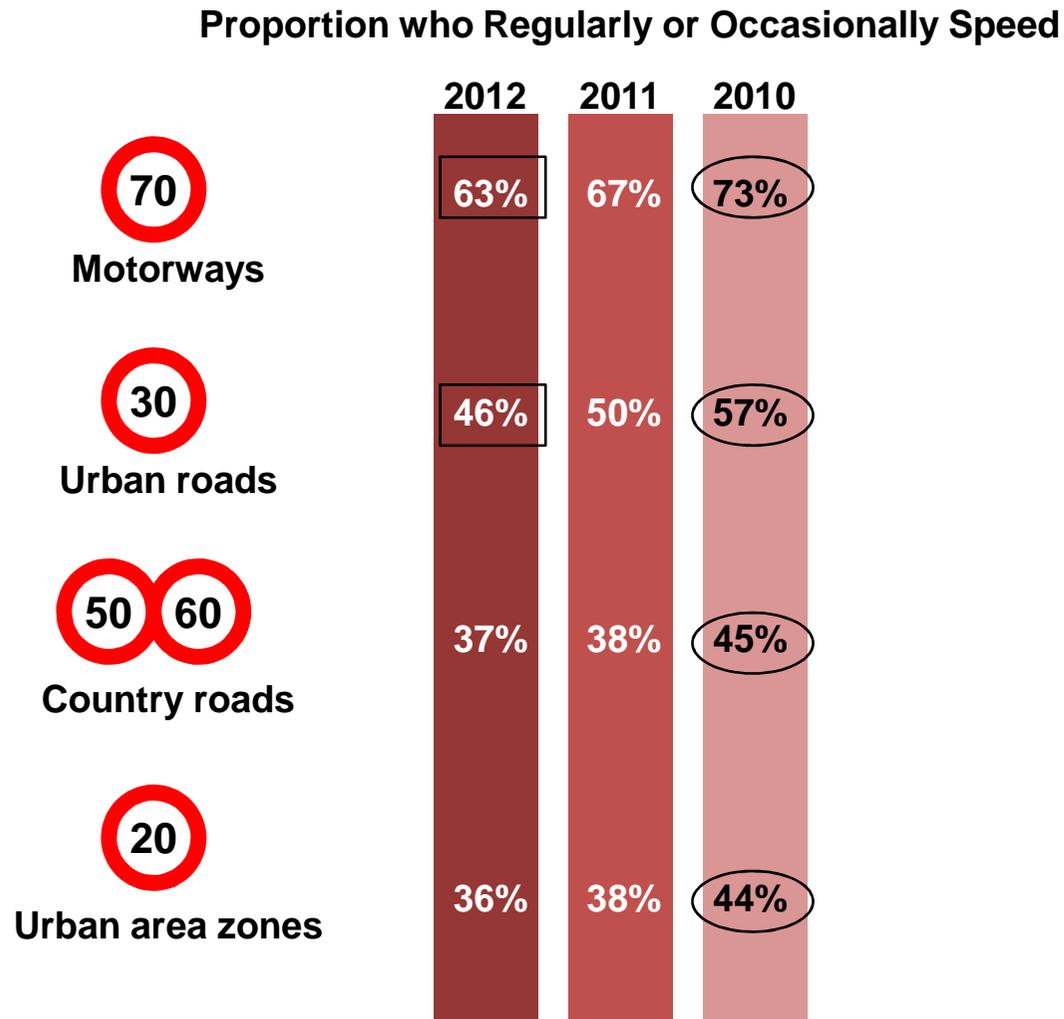
How often do you break the speed limit?

When do you typically do it?



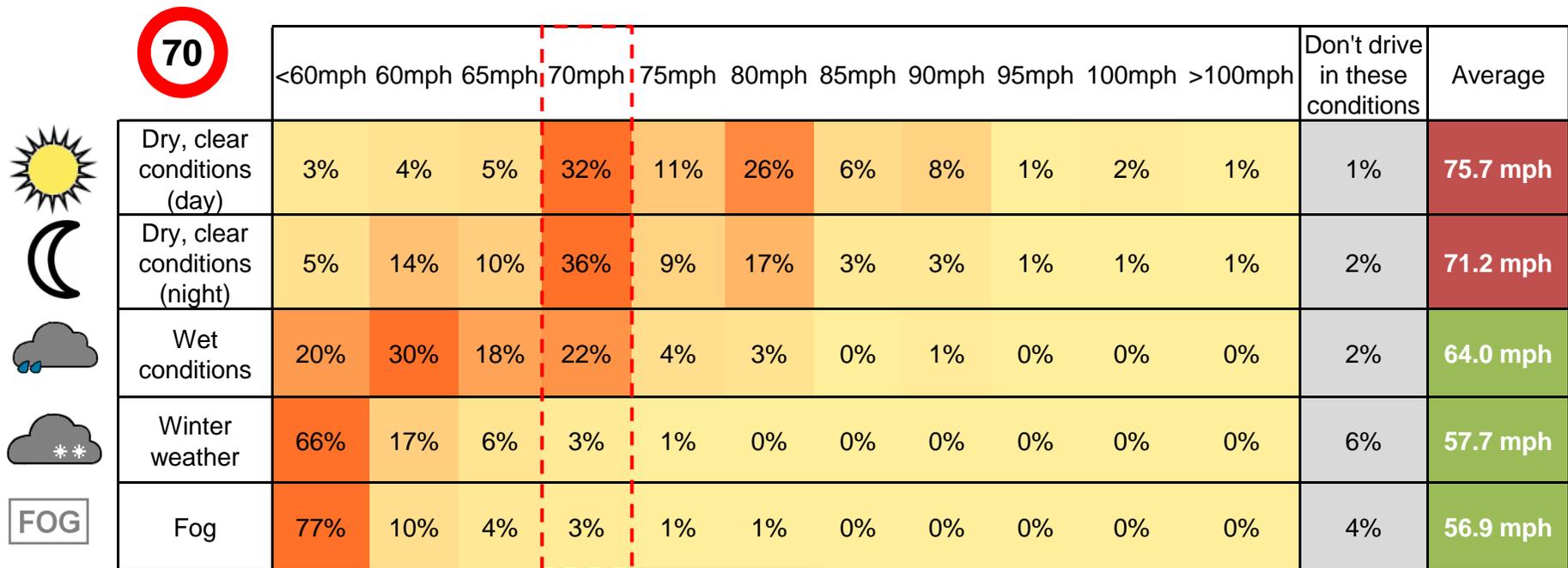
Breaking the speed limit.

The proportion speeding, whether regularly or occasionally has steadily declined on motorways and urban roads.



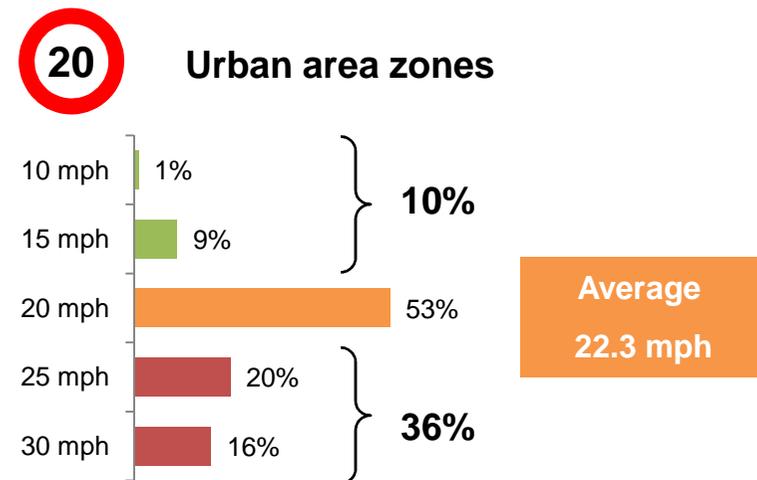
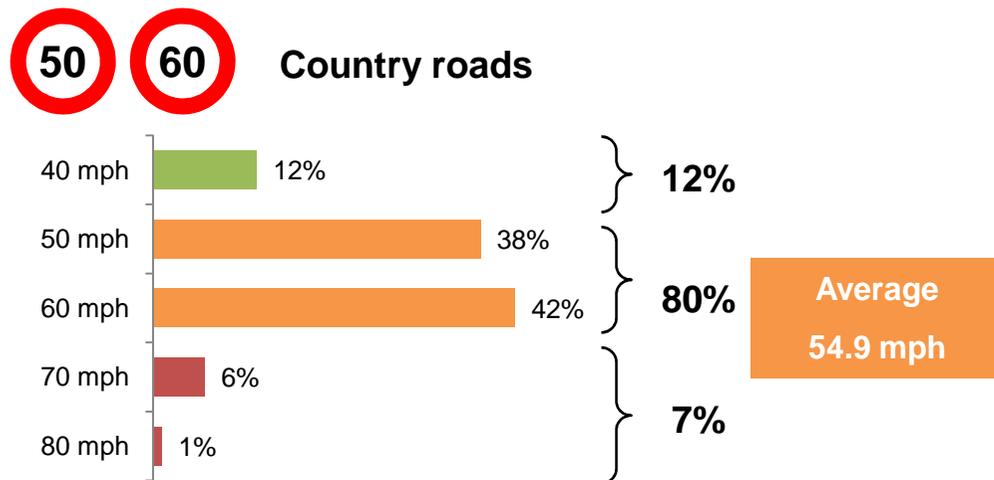
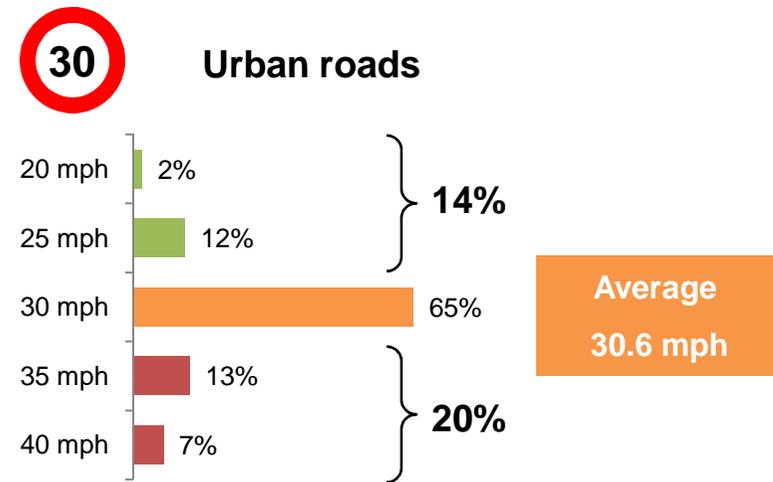
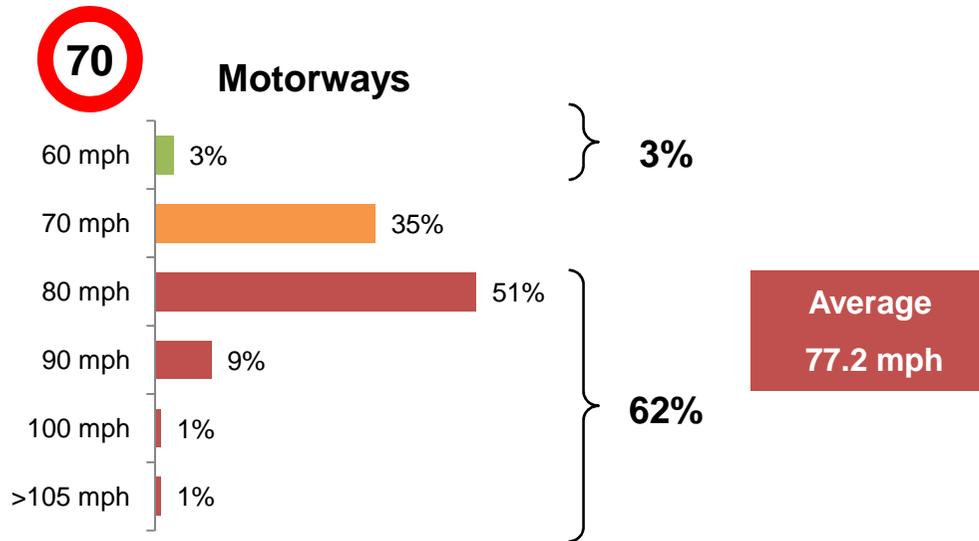
Driving in different weather conditions.

Motorists are comfortable driving above the speed limit on motorways when the weather is dry and clear. In foggy weather, on the hand, the average 'comfortable speed' drops by around 20 mph.



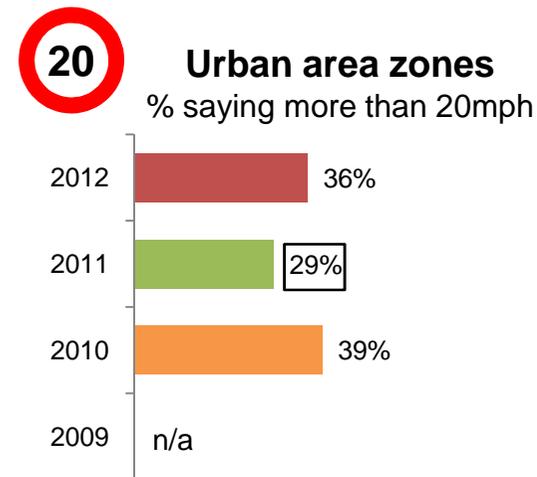
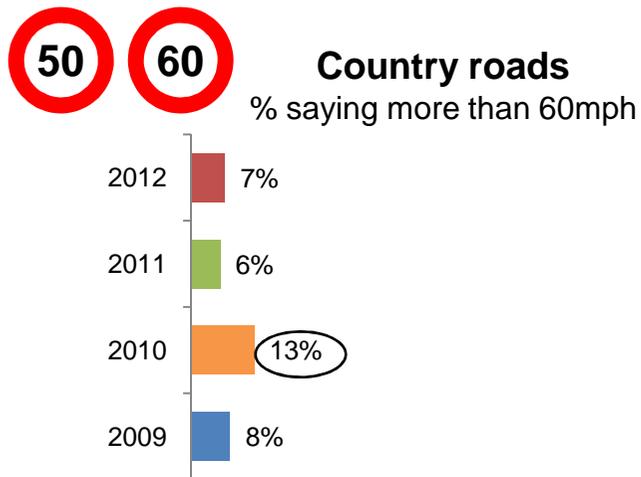
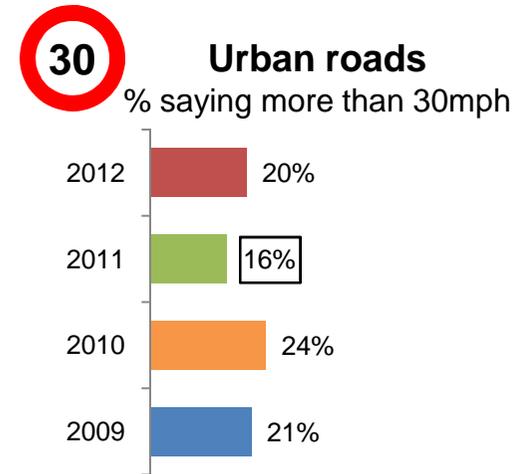
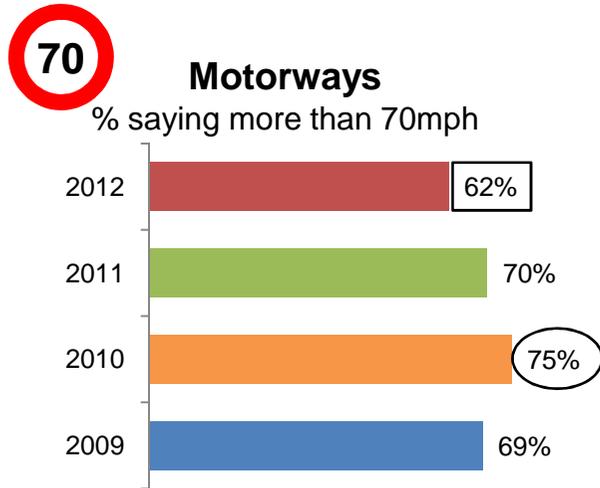
Maximum speed limits.

For all roads except motorways, motorists are happy with the existing speed limits. More than half believe that the speed limit for motorways should be 80 mph or above.



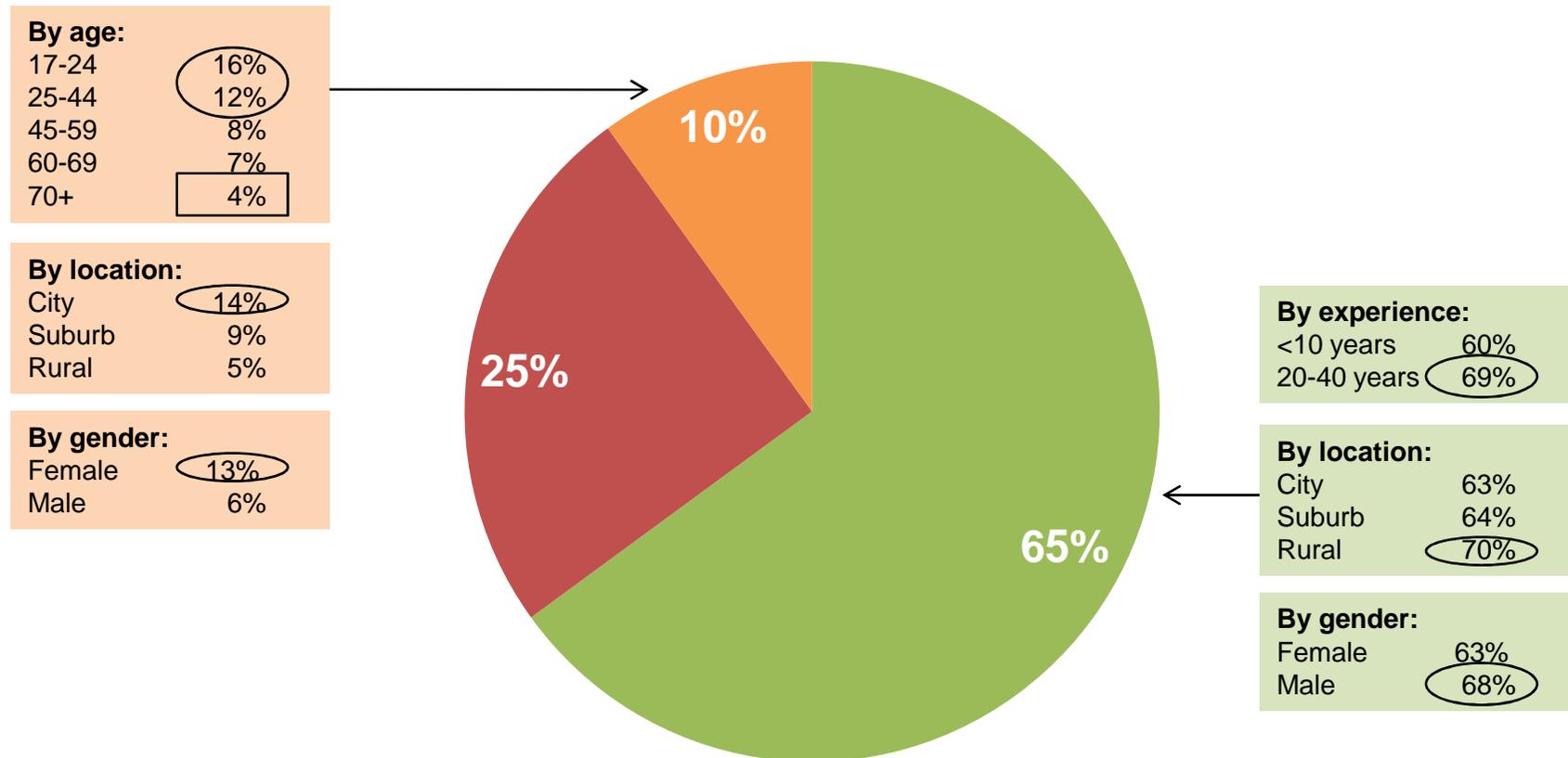
Maximum speed limits – over time.

Since 2009 the desire for higher speed limits has remained relatively consistent.



Variable speed limits.

Nearly two-thirds are happy to have different speed limits on different roads, depending on their suitability. This is particularly the case for those that live rurally and amongst more experienced and male drivers.



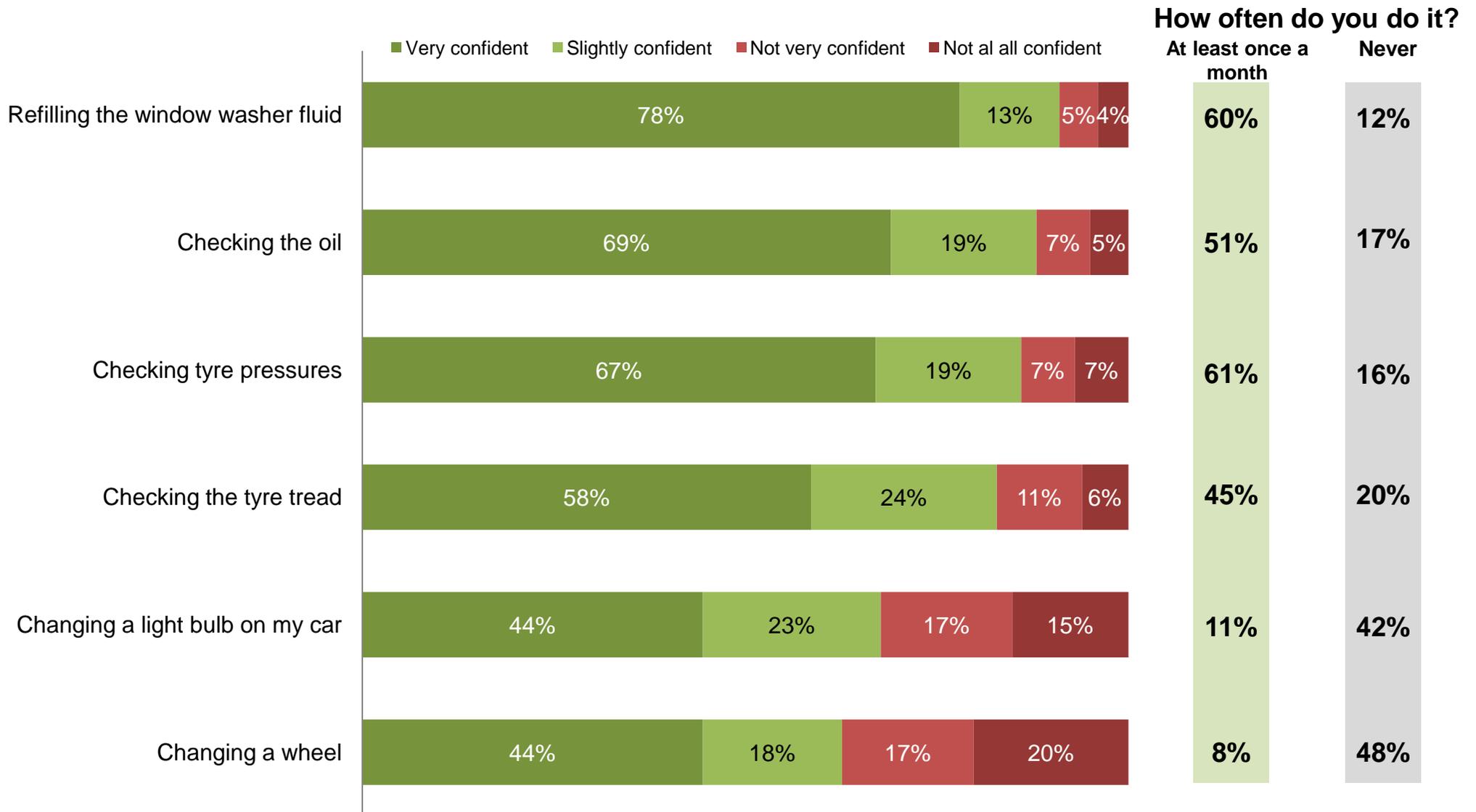
- Yes, there should be different speed limits depending on the suitability of the road
- No, the speed limit should always be the same
- Unsure



The driving environment.

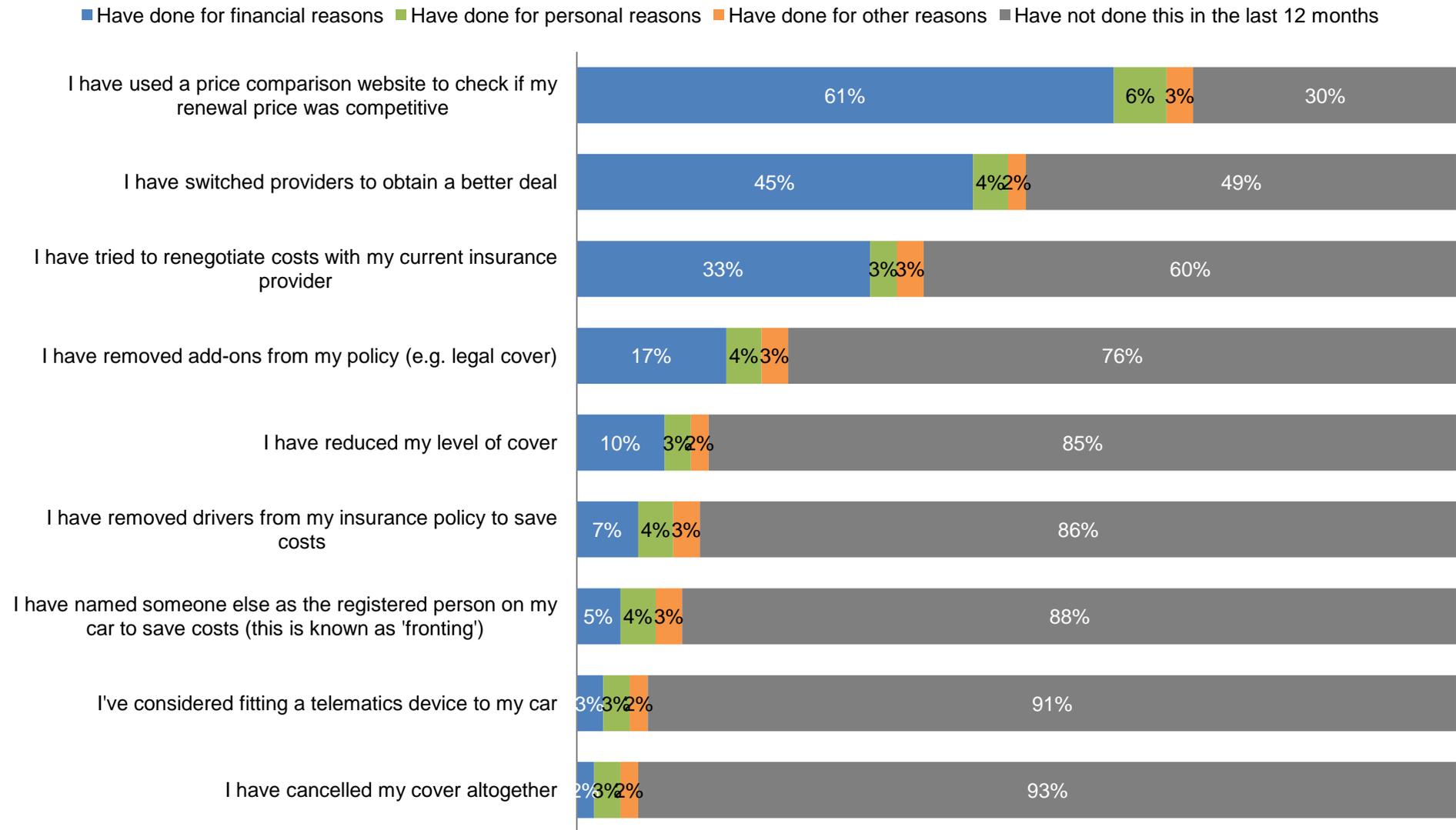
Car maintenance.

Unsurprisingly, the more frequently performed car maintenance tasks – such as refilling washer fluid – are those which motorists feel most confident with.



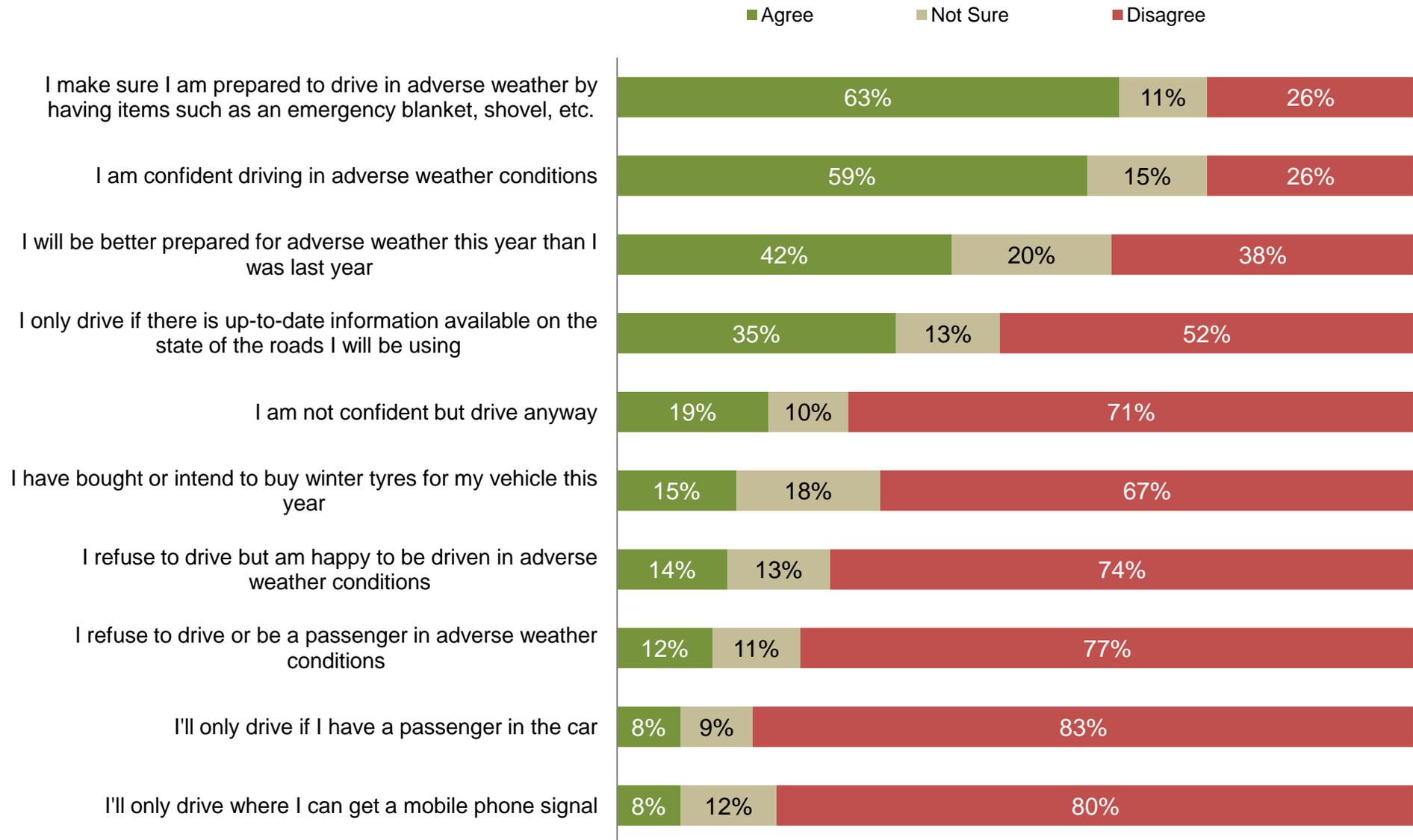
Insurance policy efficiencies.

Consumers are becoming increasingly 'deal savvy', with 7 in 10 visiting price comparison websites before buying insurance, and over half switching providers for a better deal on their car insurance.



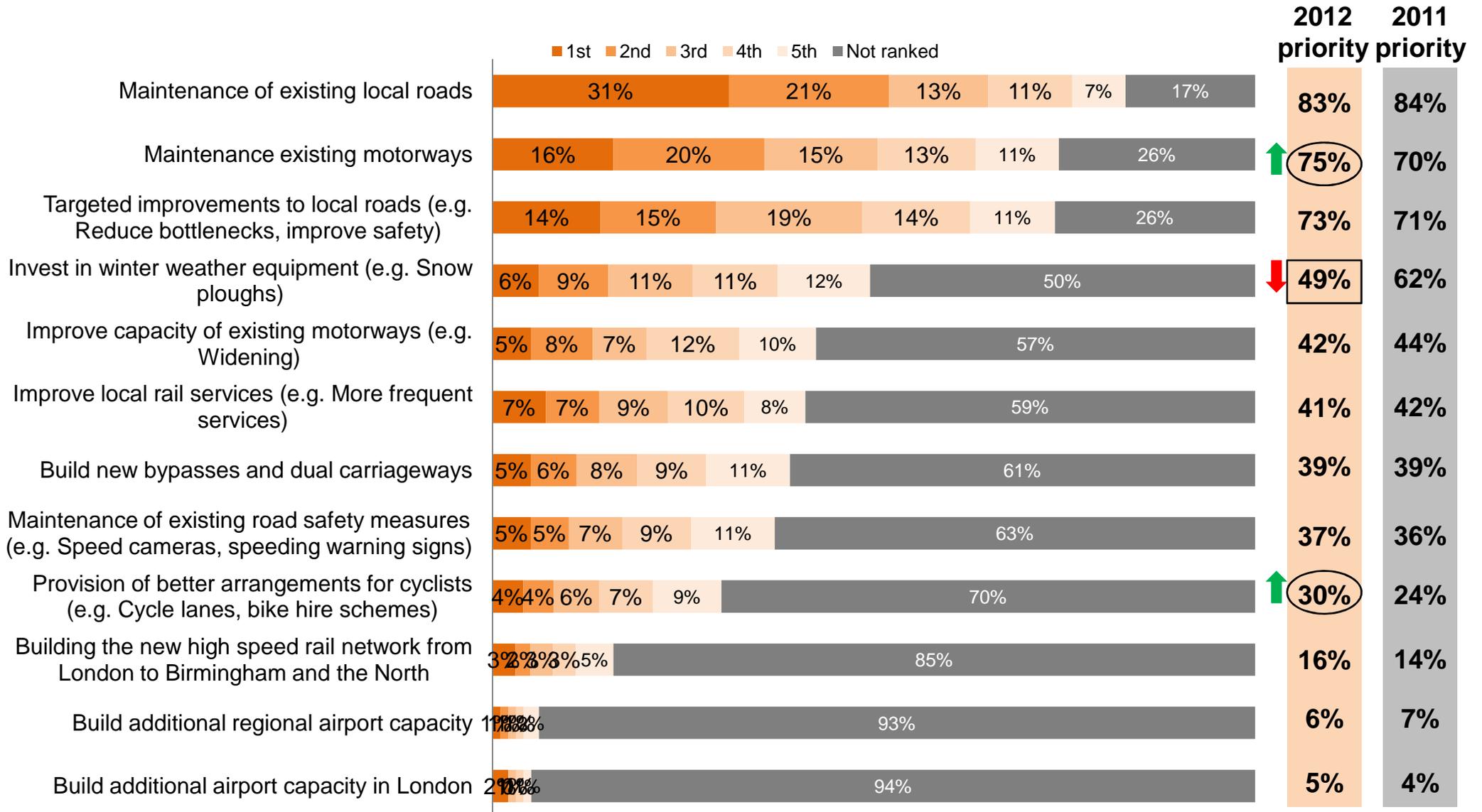
Driving in adverse weather.

The majority claim to be confident driving in adverse weather, and that they are well prepared (or at least more so than last year).



Priorities for transport funding.

Motorists tend to prioritise investment in areas that are more likely to directly benefit them: maintaining and improving local roads, and for high-mileage and company car drivers, maintaining and improving motorways.





Appendix.

Sample demographics.

		Quota set (n=1000)	Final weighted (n=1,003)
Sex	Male	49%	49%
	Female	51%	51%
Age	17 – 24	13%	13%
	25 – 44	36%	36%
	45 – 64	31%	31%
	65 – 69	10%	10%
	70+	10%	10%
SEG	ABC1	55%	55%
	C2DE	45%	45%

SQ2 In order to compare your opinions with others, please answer the following questions. Are you:

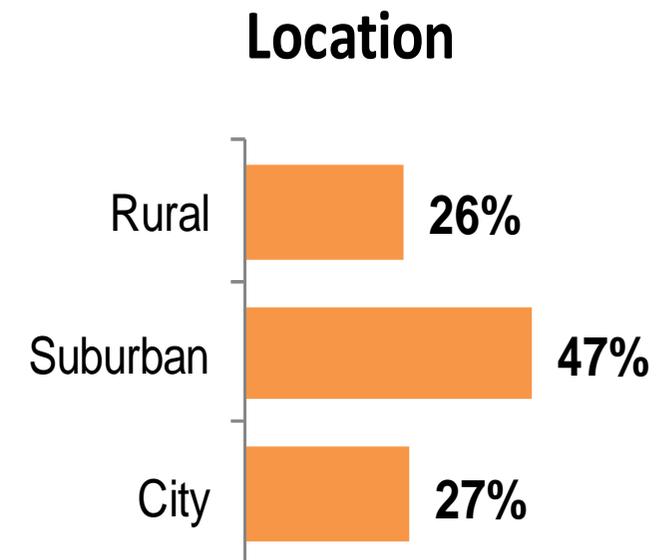
SQ3 Please write in your age.

SQ4 Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.

Base: all respondents (n=1,003)

Region.

	Quota set (n=1,000)	% Achieved (n=1,003)	Weighted (n=1,003)
East of England	9%	9%	9%
East Midlands	7%	7%	7%
London	13%	13%	13%
North East	4%	4%	4%
North West	12%	12%	12%
Scotland	9%	9%	9%
South East	14%	14%	14%
South West	9%	9%	9%
Wales	5%	4%	5%
West Midlands	9%	9%	9%
York/Humb.	9%	9%	9%

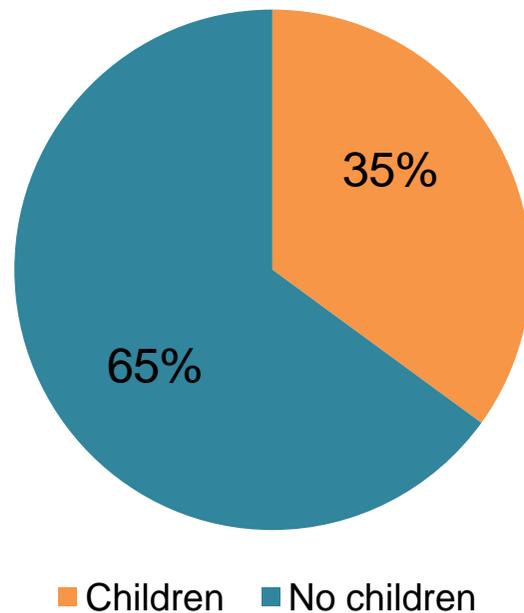


SQ5 Which of the following regions do you currently live in?

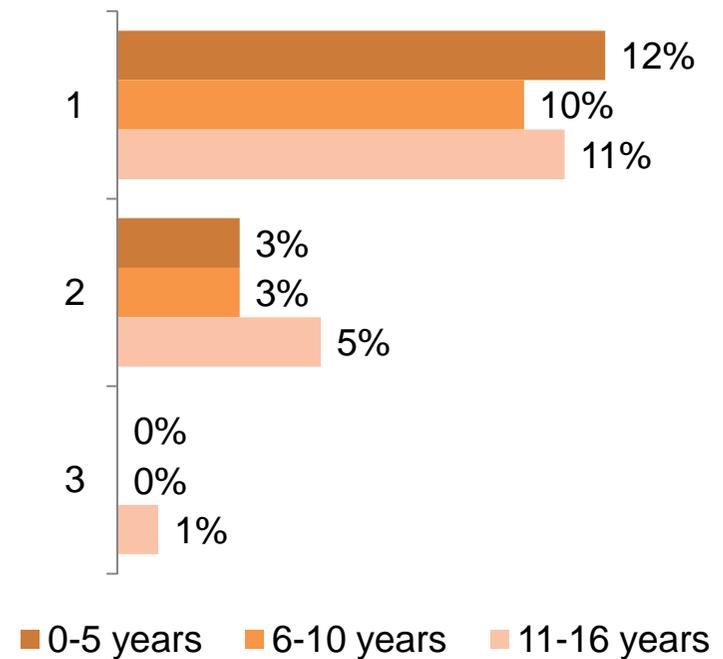
Q38 Which of the following types of location best fits where you live?

Base: all respondents (n=1,003)

Children in household.



No. of children by age group

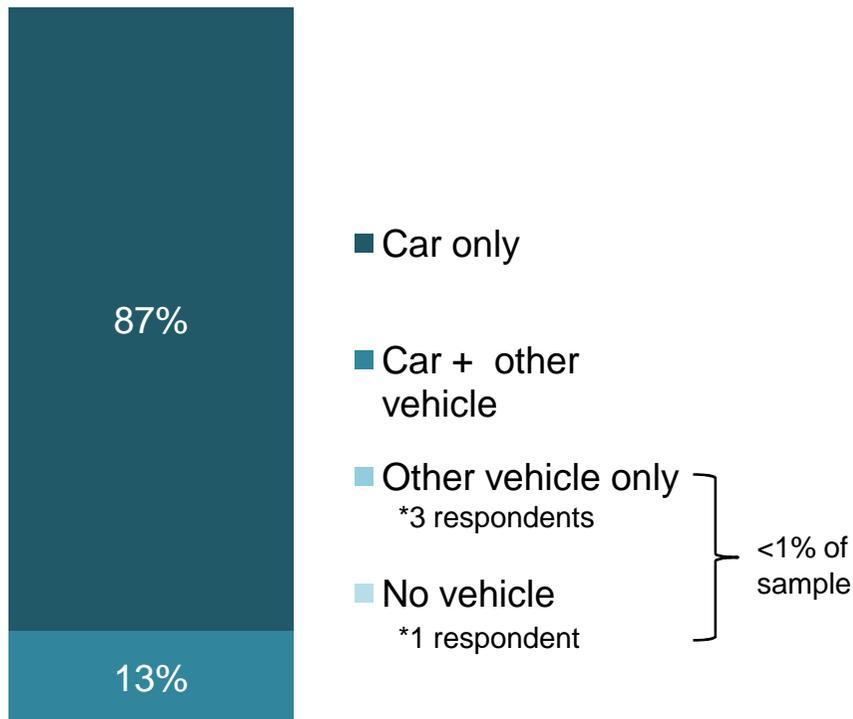


SQ3b How many children are there in your household?
Base: all respondents (n=1,003)

Cars and vehicles in household.

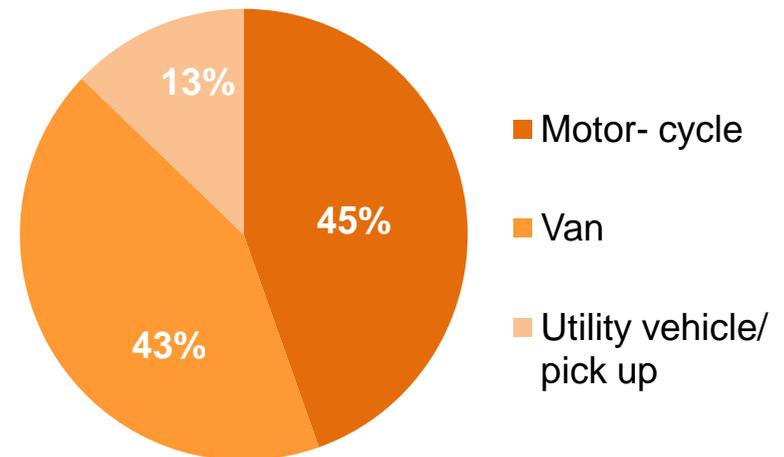
SQ8. What type of motor vehicles do you have in your household?

Base: all respondents (n=1,003)



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=129)



Motoring/ car ownership/ car purchase.

	Quota set (n=1,000)	% Achieved (n=1,003)	Weighted (n=1,003)
Hold current driving licence	-	100%	100%
Drive car at least monthly nowadays	-	100%	100%
Car ownership			
Privately owned	90%	90%	92%
Provided by company	10%	10%	8%
Car purchase			
New	-	45%	44%
Nearly new	-	17%	18%
Second- hand used	-	37%	38%

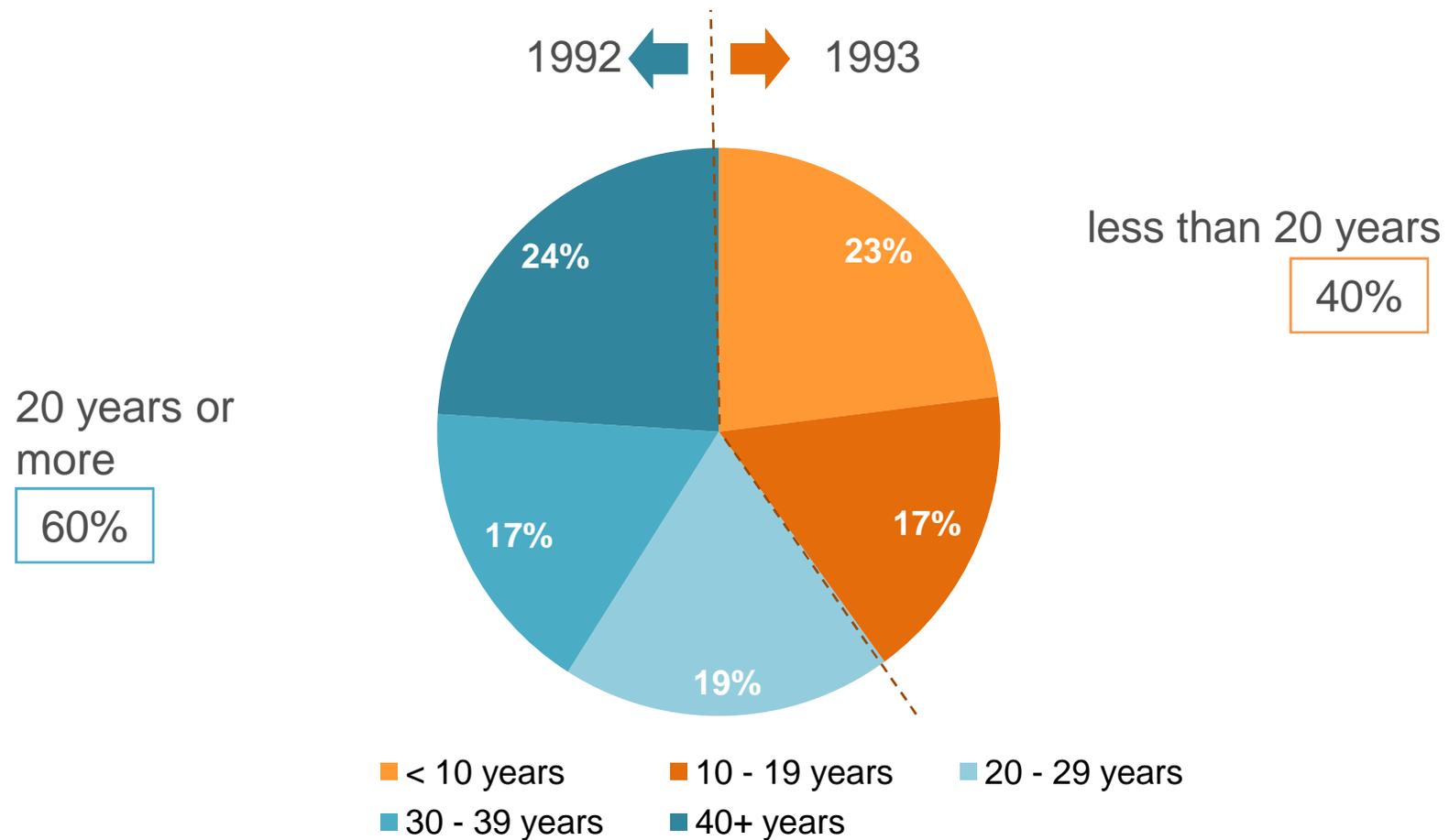
SQ6 Do you personally hold a full current UK driving license? Base: all respondents (n=1,003)

SQ13 And how often do you personally drive a vehicle nowadays? Base: all respondents (n=1,003)

SQ11 How was the vehicle you use, bought? Base : motor vehicle owners (n=1,002)

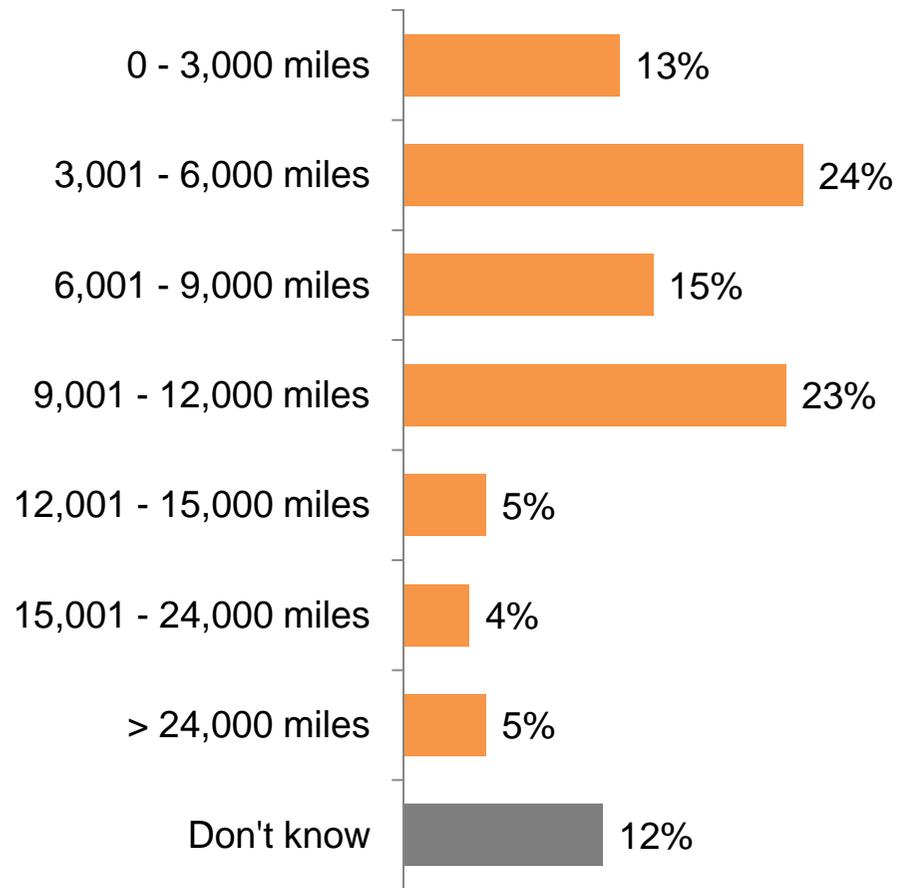
SQ12 Was the vehicle you use bought from new, nearly new or second hand? Base : motor vehicle owners (n=1,002)

Length of time driving.



SQ7 And, roughly, in what year did you pass your driving test? For example: 1981
Base: all respondents (n=1,003)

Annual mileage.



Mean mileage by group

All motorists 9,115

By usage

Company car drivers 18,266
Private motorists 8,219

By rule-breaking behaviour

Regular speeders 11,383
Non-speeders 7,224
Drivers 'under the influence' 10,772
Drivers not 'under the influence' 8,905

By demographics/lifestyle

Male 10,240
Female 7,921
Children in household 10,001
No children in household 8,669

SQ14 Approximately how many miles do you drive in a year, on average?
Base: motor vehicle owners (n=1,002)

Methodology.

A total sample of 1,003 motorists:

- 1,003 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 – 20 minutes

Fieldwork dates

- Tuesday 24th January – Wednesday 1st February 2012

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

- Significantly higher 
- Significantly lower 

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



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