



RAC Report on Motoring 2016

27th June 2016

Research report prepared for the RAC Advisory Panel

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What we'll cover.

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motorists' minds

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8

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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

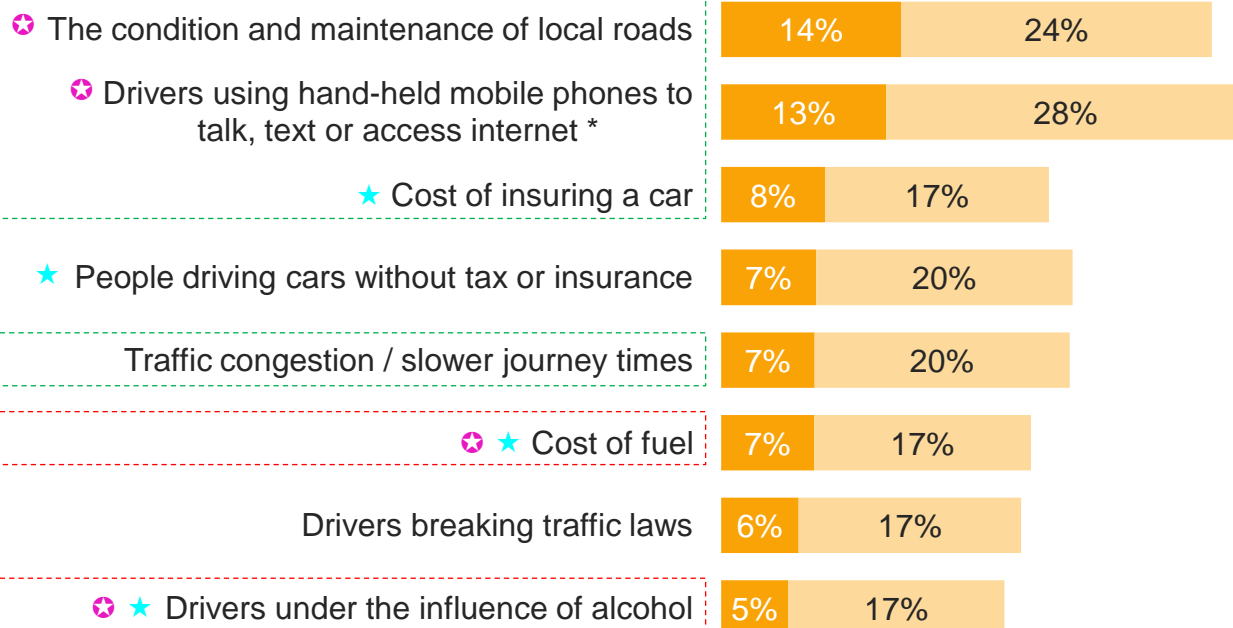
2

- 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)



Top concern RANK			Top concern %		
2014	2015	2016	2014	2015	2016
-	1	1	-	10%	14% ▲
6*	4*	2	6%*	9%*	13% ▲
4	6	3	9%	5%	8% ▲
5	5	4	8%	7%	7%
7	8	5	6%	5%	7% ▲
1	2	6	21%	10%	7% ▼
8	9	7	5%	5%	6%
3	3	8	10%	9%	5% ▼

☆ 2015 issues of most total concern (Top 4)

★ 2014 issues of most total concern (Top 4)

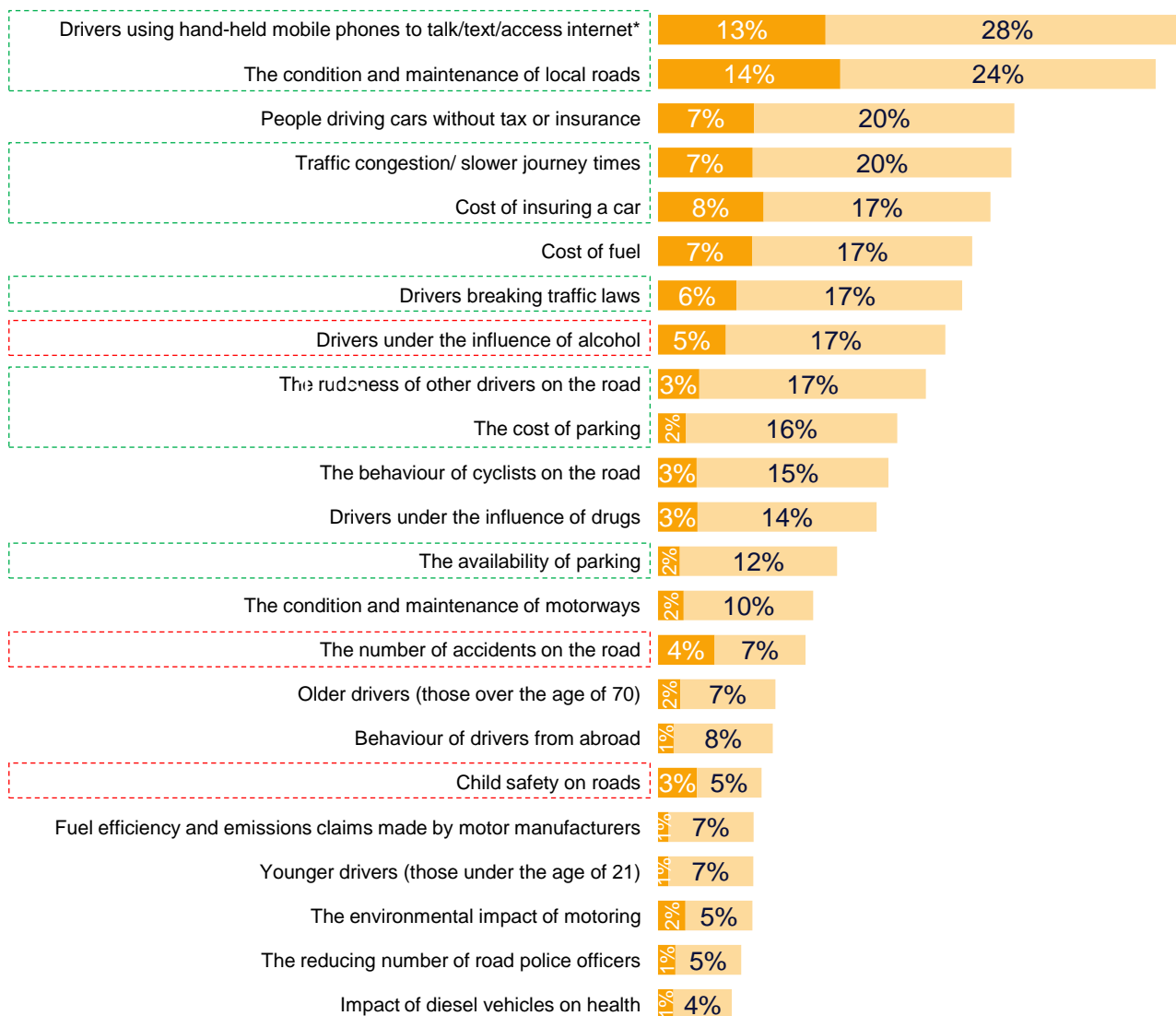
* In 2014 and 2015, this was asked as two separate statements. To allow for comparison, an average was taken across the two statements as the levels of concern across the two were comparable.



Motorists' concerns

■ Issues of most concern (ranked 1)

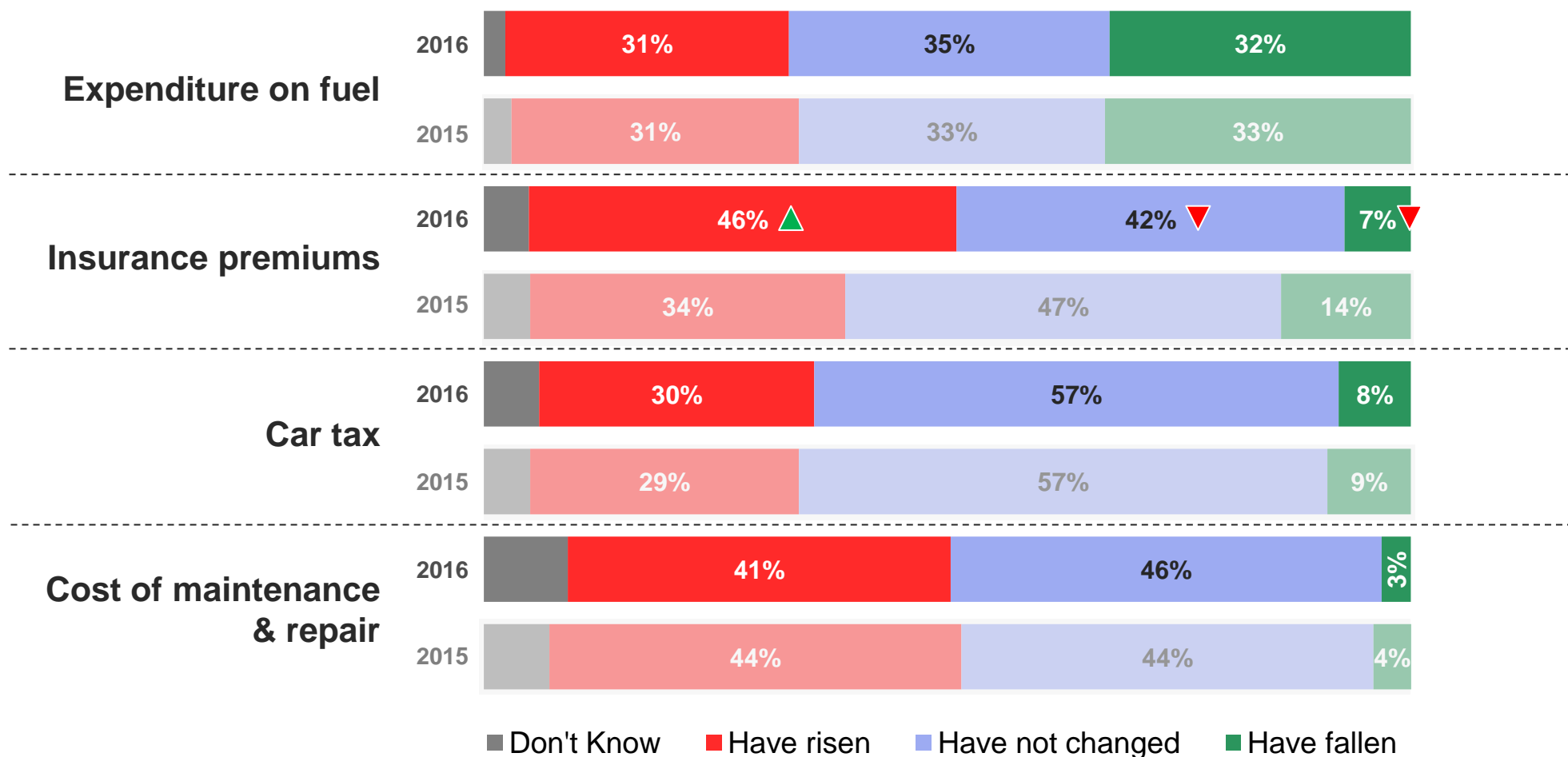
■ Other issues of concern (ranked 2-4)



Total concern RANK			Total concern %		
2014	2015	2016	2014	2015	2016
4*	1*	1	33%*	34%*	41%▲
-	2	2	-	30%	38%▲
3	4	3	35%	26%	27%
8	9	4	21%	18%	27%▲
6	8	5	28%	18%	26%▲
1	5	6	47%	26%	24%
7	7	7	22%	19%	23%▲
5	3	8	32%	29%	22%▼
10	11	9	15%	15%	21%▲
-	14	10	-	12%	18%▲
12	10	11	13%	16%	18%
9	6	12	18%	19%	17%
-	18	13	-	8%	14%▲
-	13	14	-	13%	12%
11	12	15	13%	14%	11%▼
16	17	16	6%	10%	9%
-	-	17	-	-	9%
13	16	18	9%	11%	8%▼
-	-	19	-	-	7%
17	19	20	6%	8%	7%
15	20	21	7%	7%	7%
-	-	22	-	-	6%
-	-	23	-	-	6%

Running cost charges

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

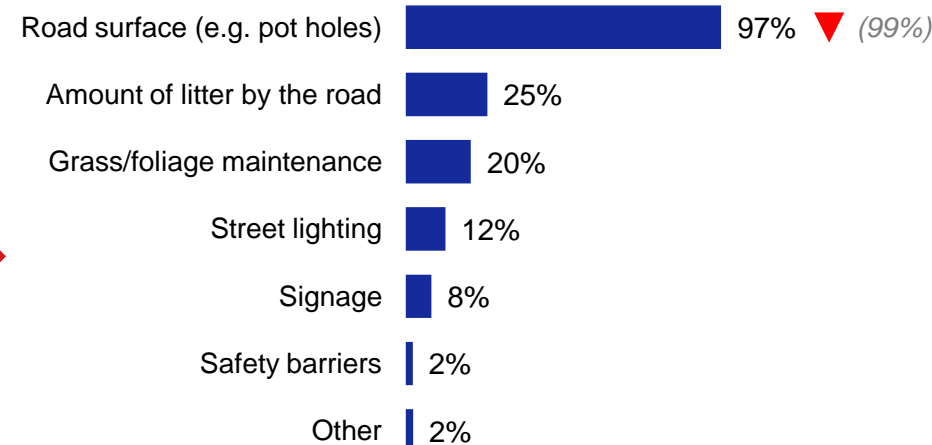
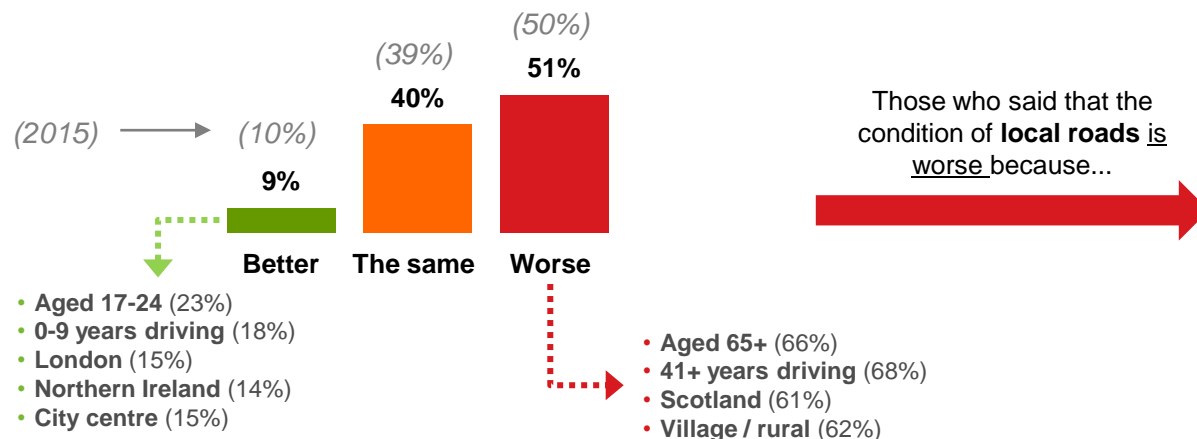


QG1. Over the past 12 months, how, if at all, have your motoring costs changed? Bases: All respondents – 2016 (1714), 2015 (1555).

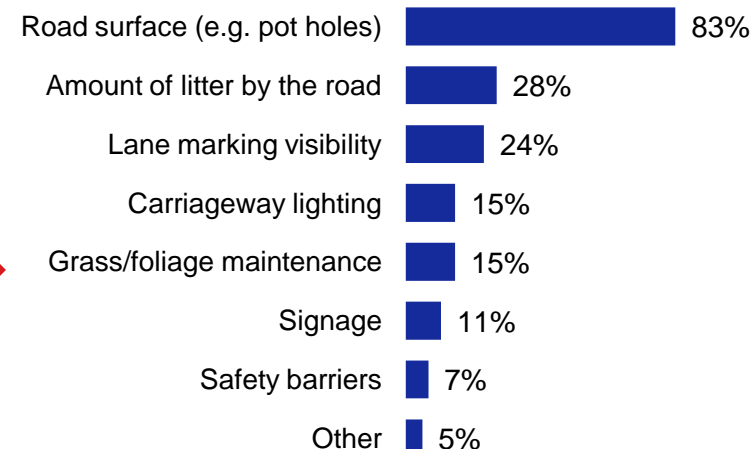
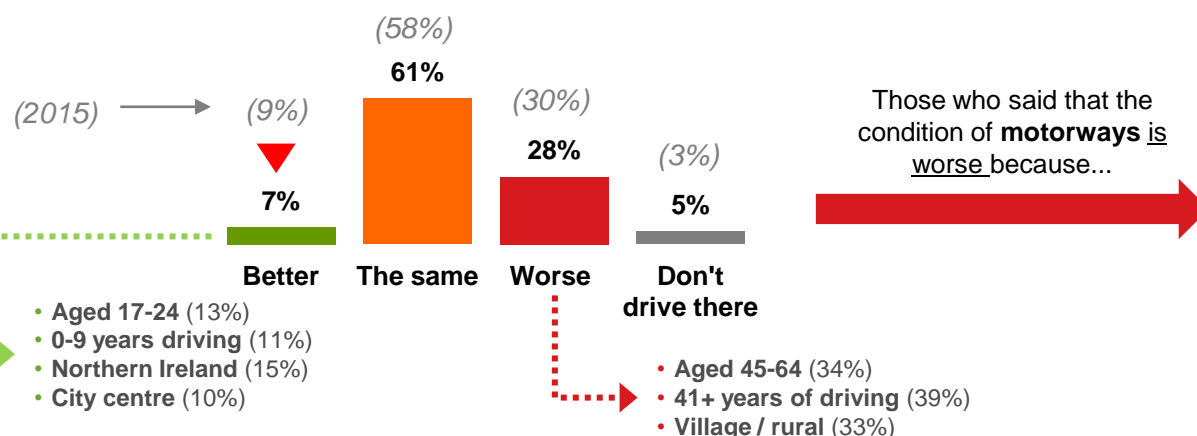
Condition of local roads and motorways

Motorists feel that local roads continue to be neglected.

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

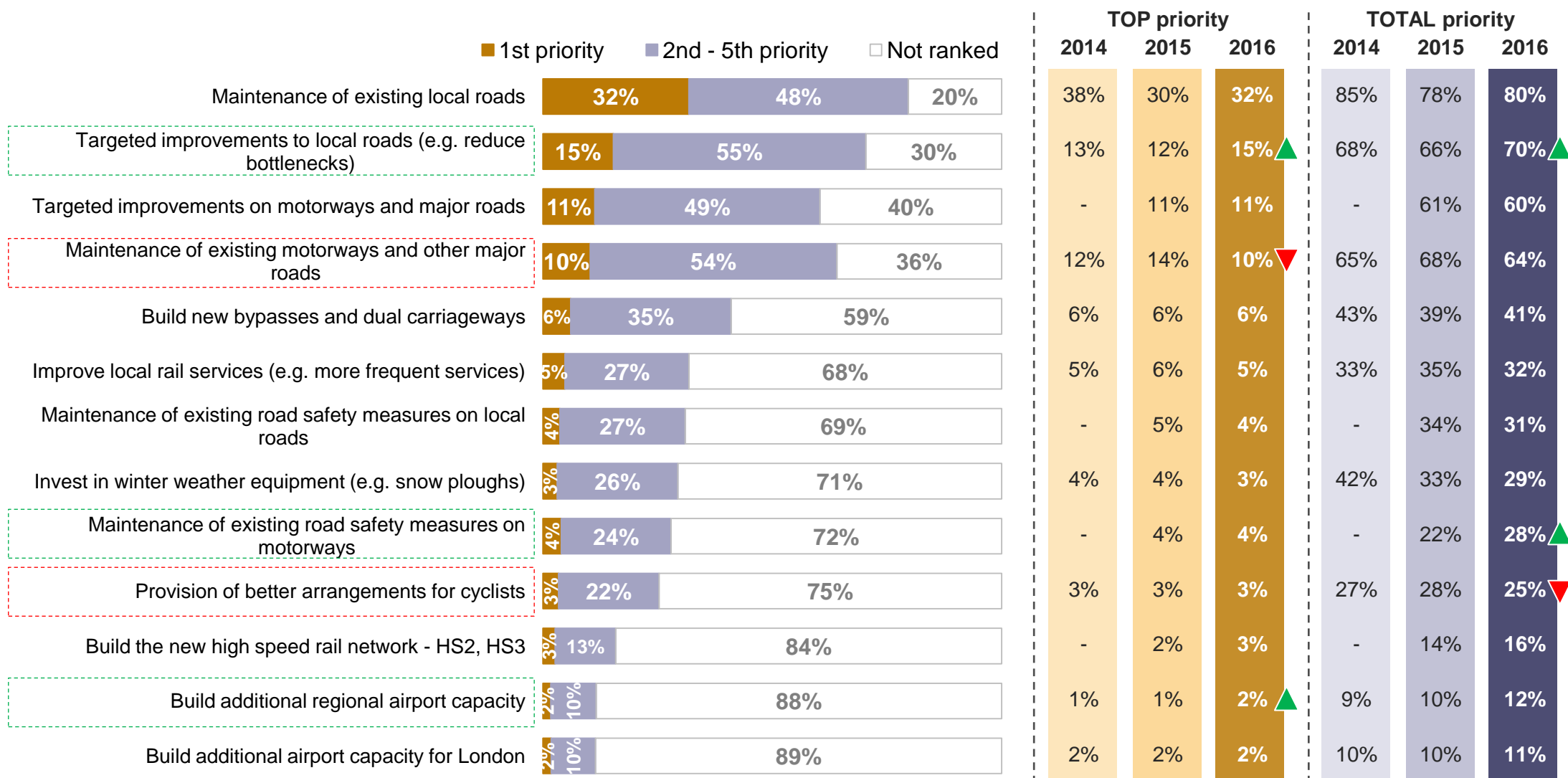


Condition of motorways / dual carriageways compared to a year ago...



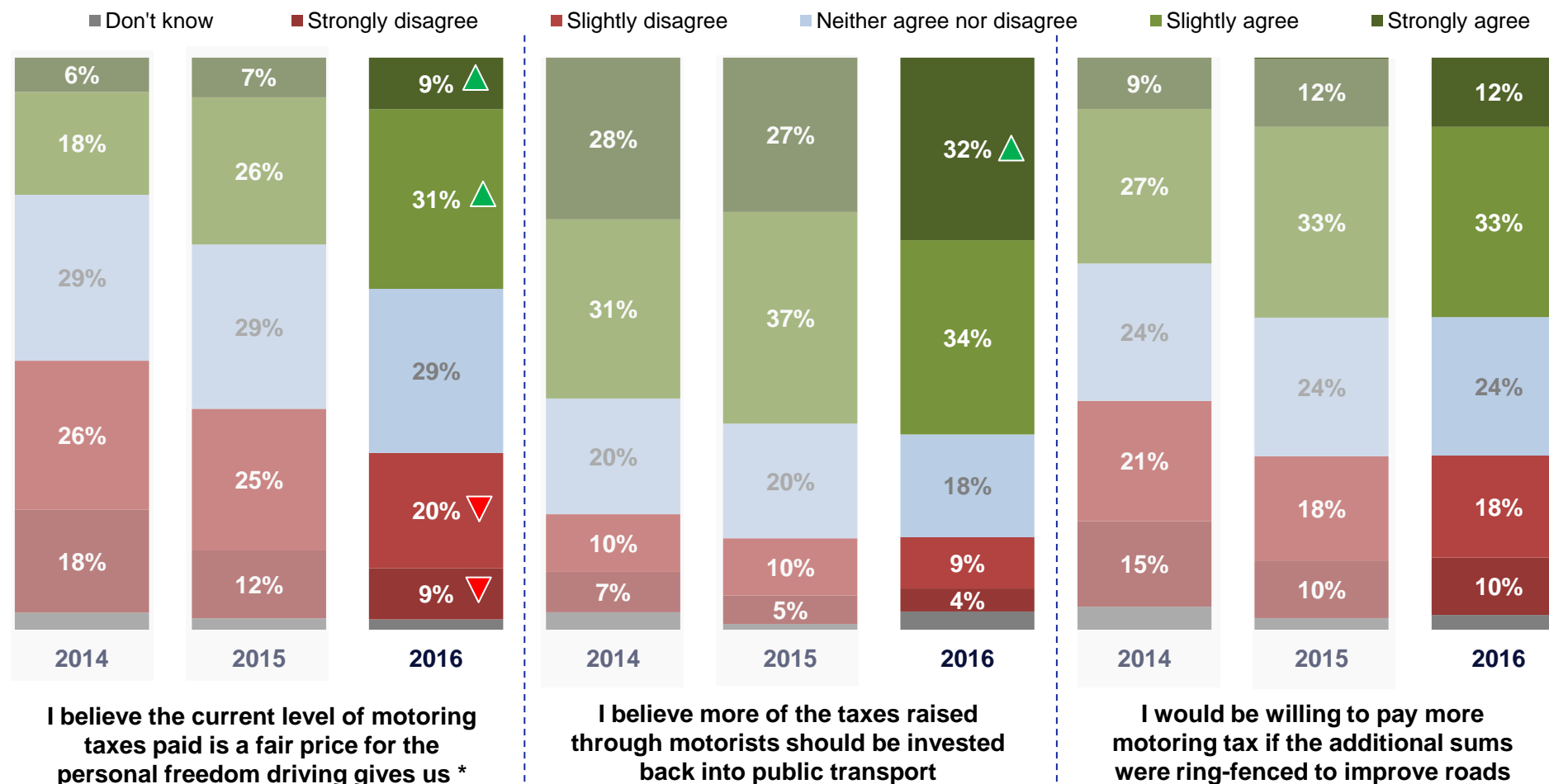
Priorities for transport investment

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

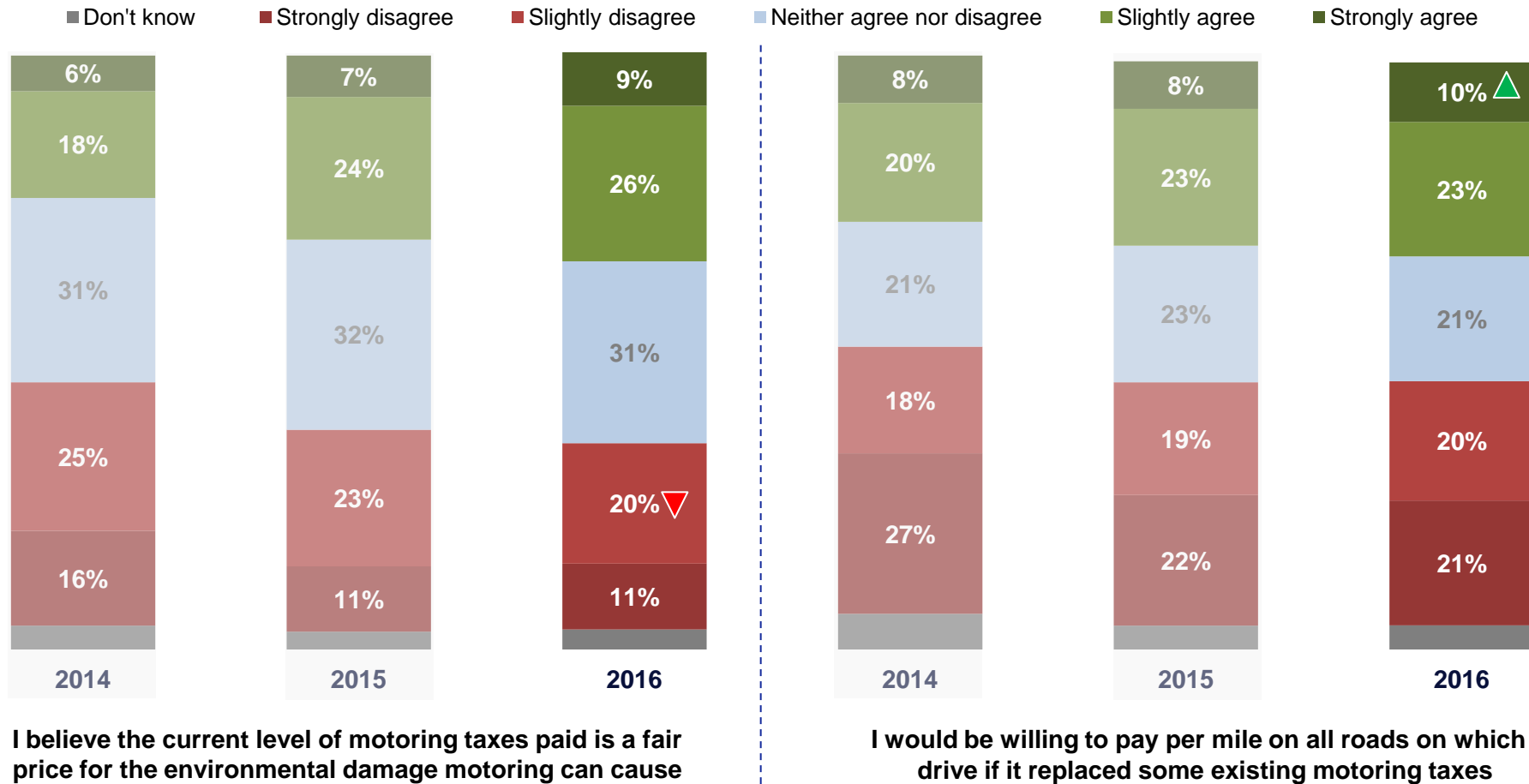


QG3. In the current economic climate, the national and local government have limited funding available for transport investment. Based on the list below, please rank your top 5 in order of priority where you believe transport funding should be prioritised, with 1 being the first priority. Bases: All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

Motoring taxes (1)



Motoring taxes (2)

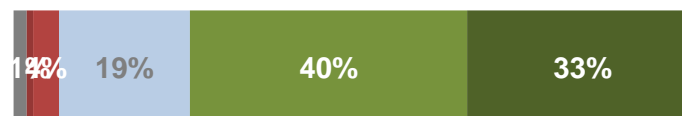




Motoring issues

■ 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



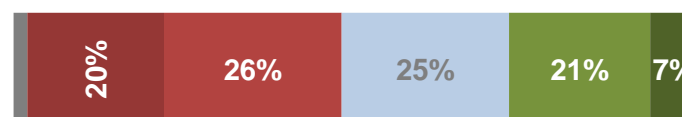
Local journey times are becoming less predictable



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



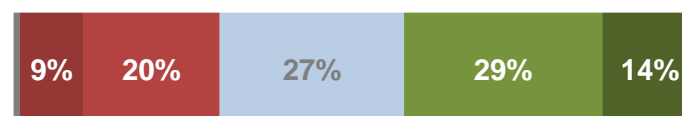
I don't think I am very likely to get caught if I break most motoring laws



There are not enough police on the roads enforcing driving laws

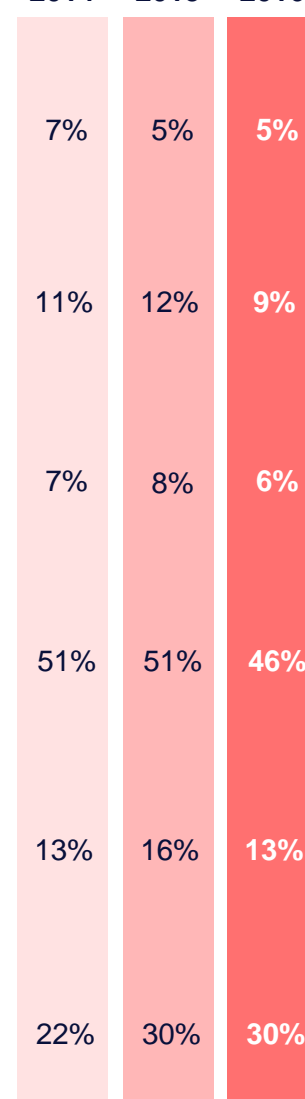


Motoring may become a rare luxury if the cost of driving continues to escalate



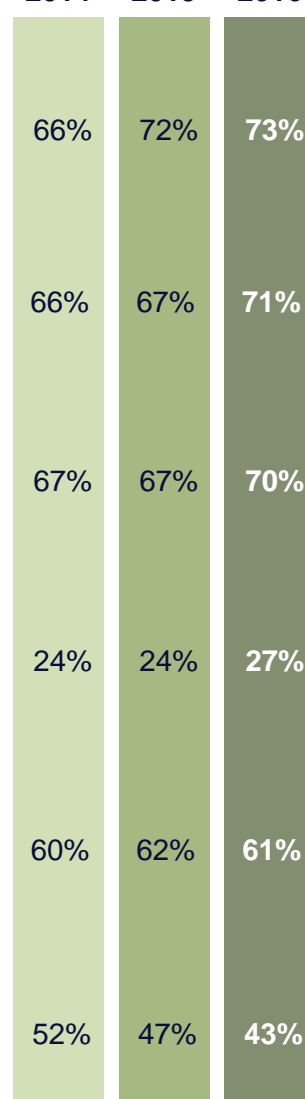
Total Disagreement

2014 2015 2016



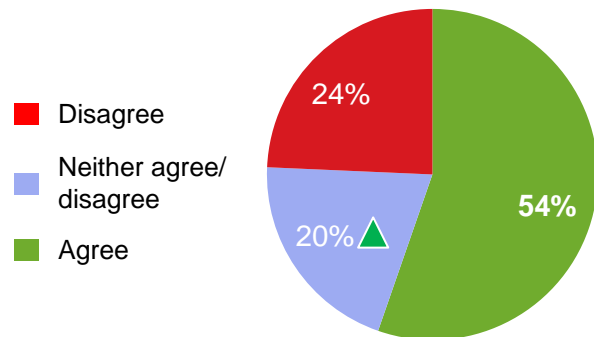
Total Agreement

2014 2015 2016

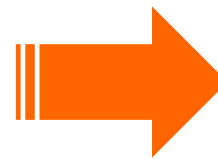


QL2. Thinking broadly about a wide range of motoring issues, how strongly do you agree or disagree with the following statements? QL7. And thinking about a few more motoring issues, how strongly do you agree or disagree with the following statements? Bases: All respondents – 2016 (1714), 2015 (1555),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

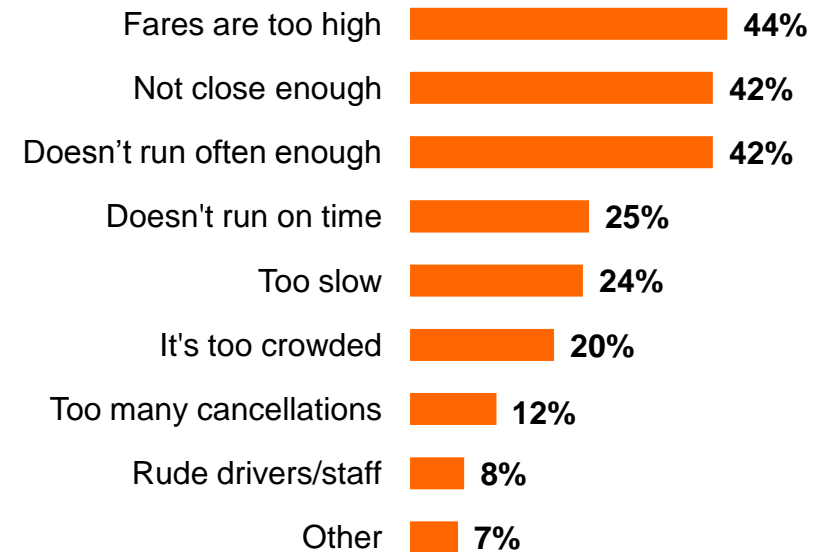
Reasons for not using public transport



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



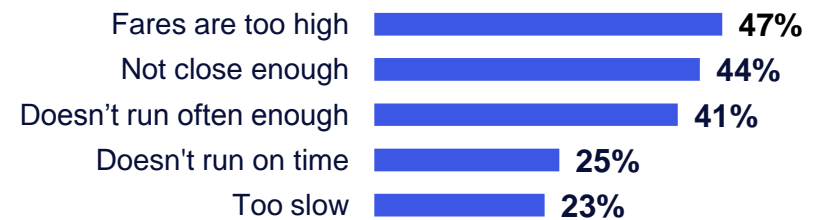
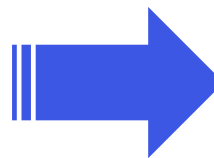
But don't use it more because...



2015

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

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

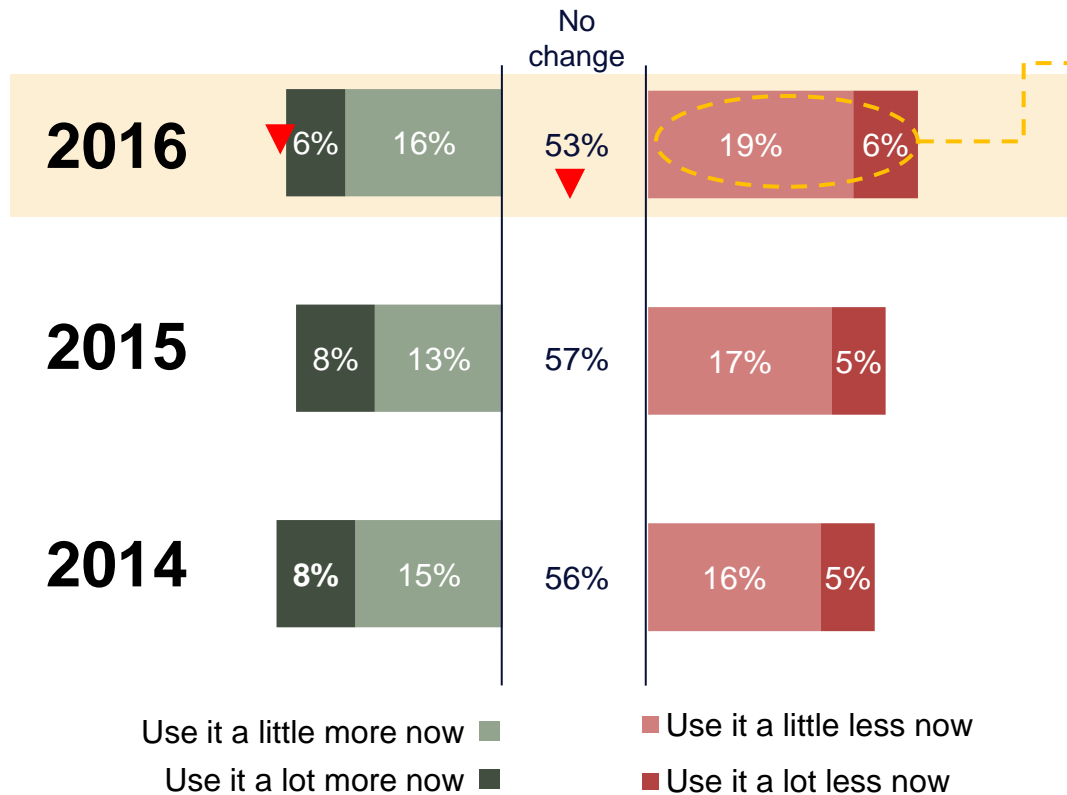


QL2. Thinking broadly about a wide range of motoring issues, how strongly do you agree or disagree with the following statements? Bases: All respondents – 2016 (1714), 2015 (1555). QL3. You said that you would use your car less if public transport was better. Please can you tell us why you don't currently use public transport more? Bases: Those who would use their car less if public transport was better – 2016 (931), 2015 (876).

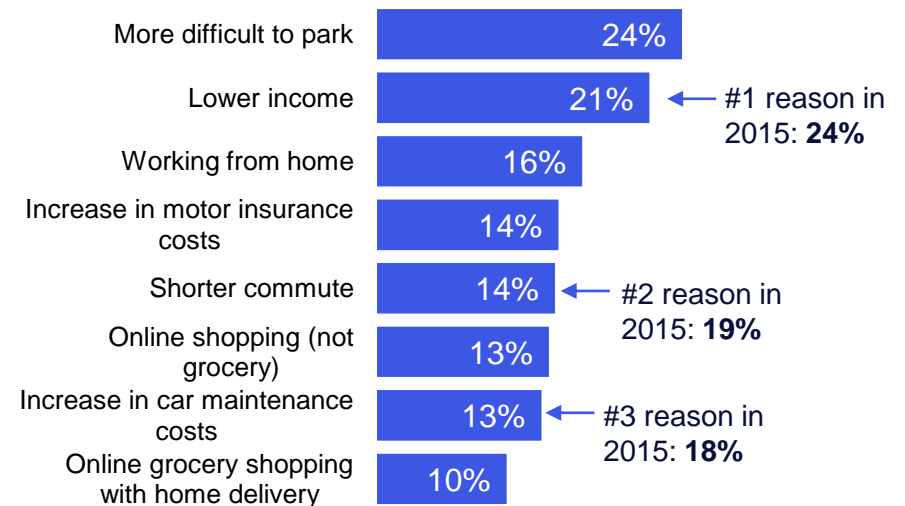
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Motor vehicle usage

Car usage compared to a year ago...



They use their motor vehicle less because...



Statements above 10% shown

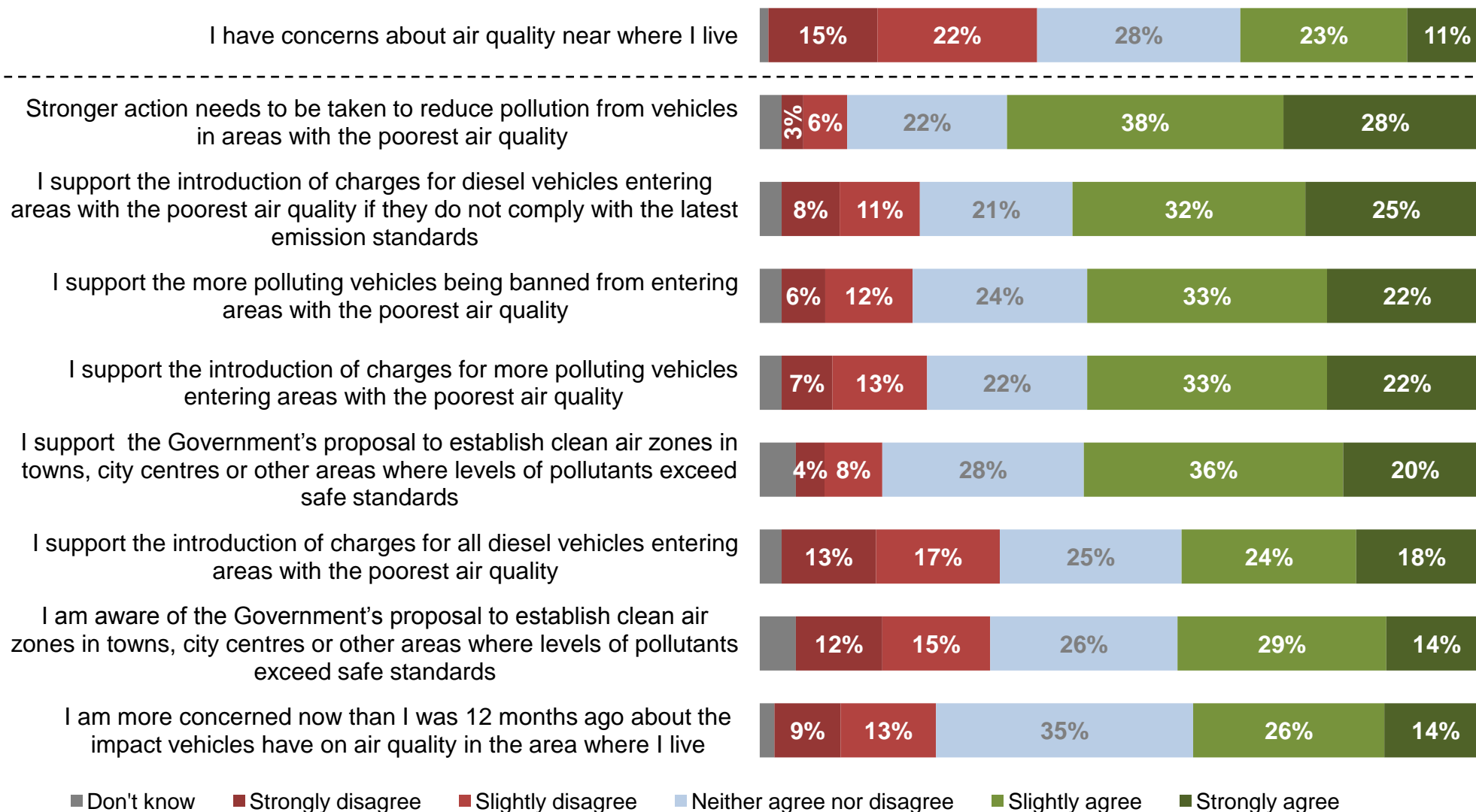
14% feel that they are less dependant on their vehicle compared to 12 months ago.
This is a significant increase since 2015 (9%)

Car and the environment

3

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

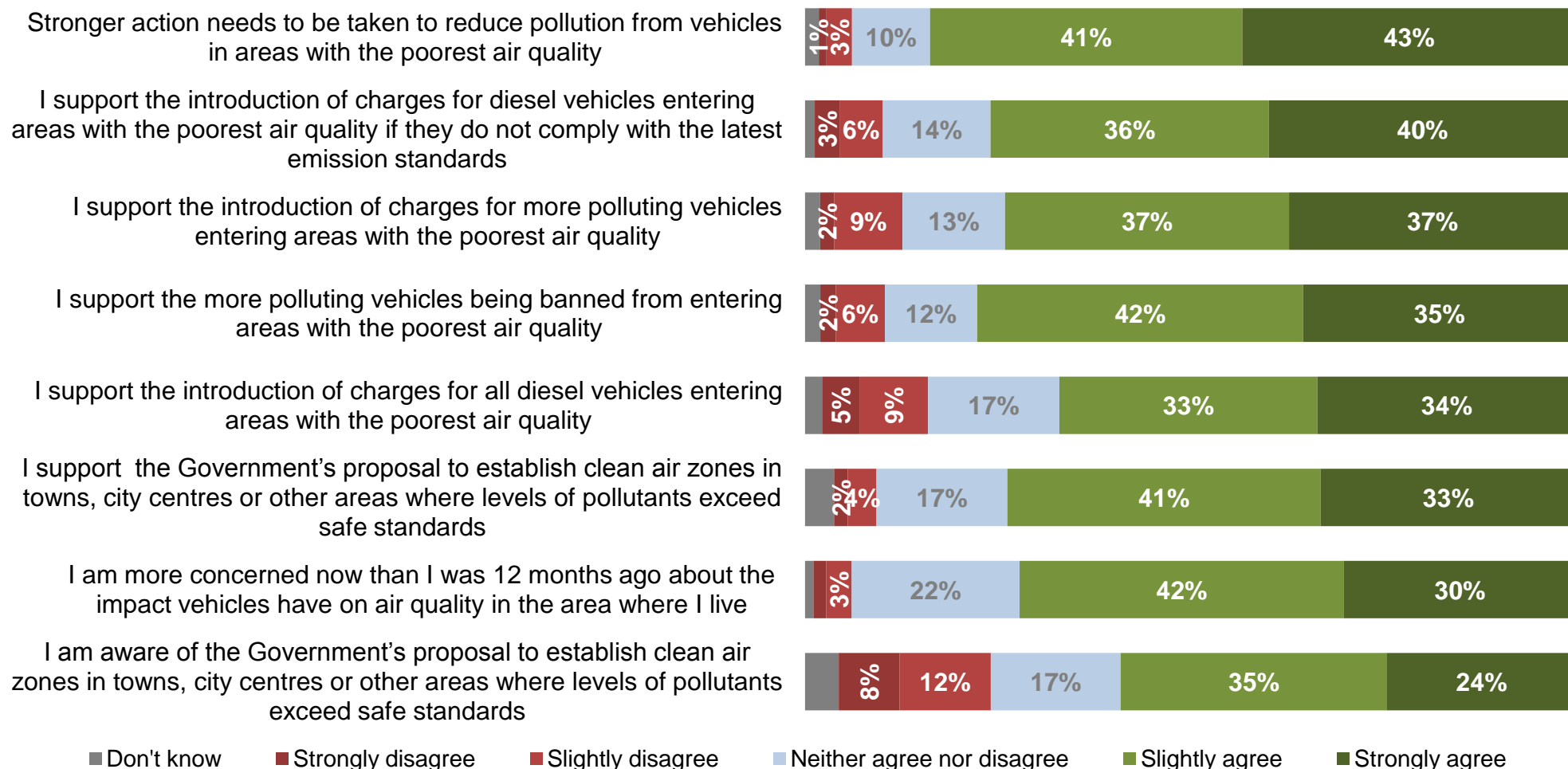
The local environment (1)



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





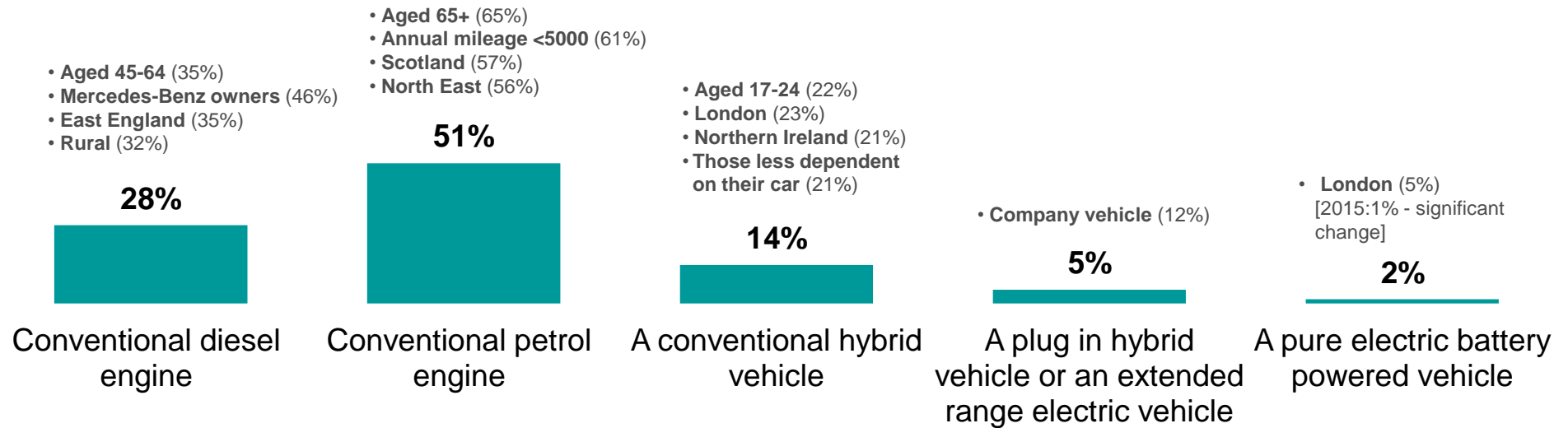
Cars of the future

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%)



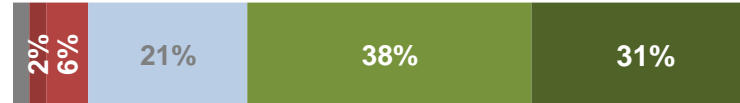
41%
would
prefer a
used car

- 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

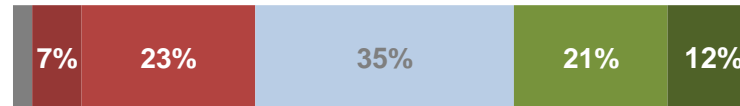
I am opposed to any new technology that has the potential to distract drivers



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 *



Total Disagreement

2015 2016

9% 8%

12% 11%

36% 30% ▼

45% 41%

17% 11% ▼

34% 33%

Total Agreement

2015 2016

75% 69% ▼

59% 51% ▼

30% 33%

21% 23%

52% 62% ▲

27% 27%

* Statement wording amended from 2015

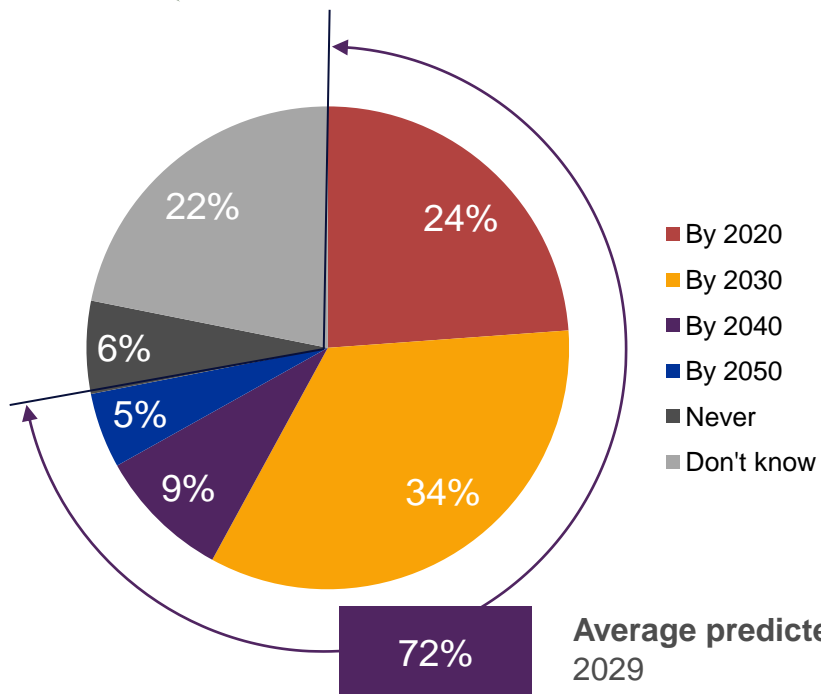
QN3/4 To what extent do you agree or disagree with the following statements? Bases: All respondents – 2016 (1714), 2015 (1555).

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

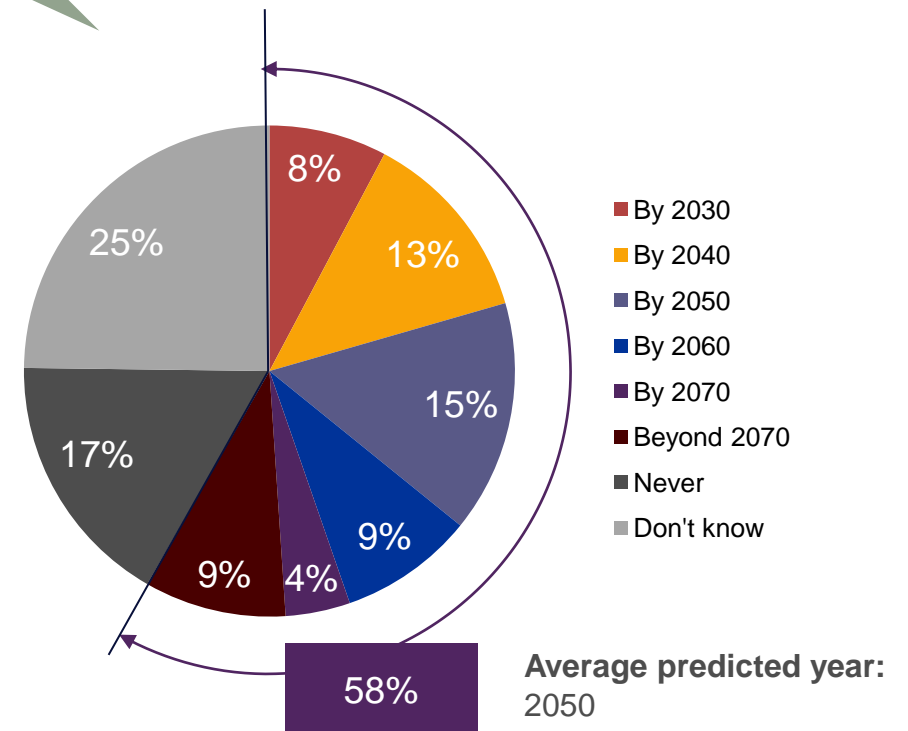
There is some confidence that driverless cars will become available for purchase in the next 5 to 15 years, however, motorists are less certain about their future beyond availability.



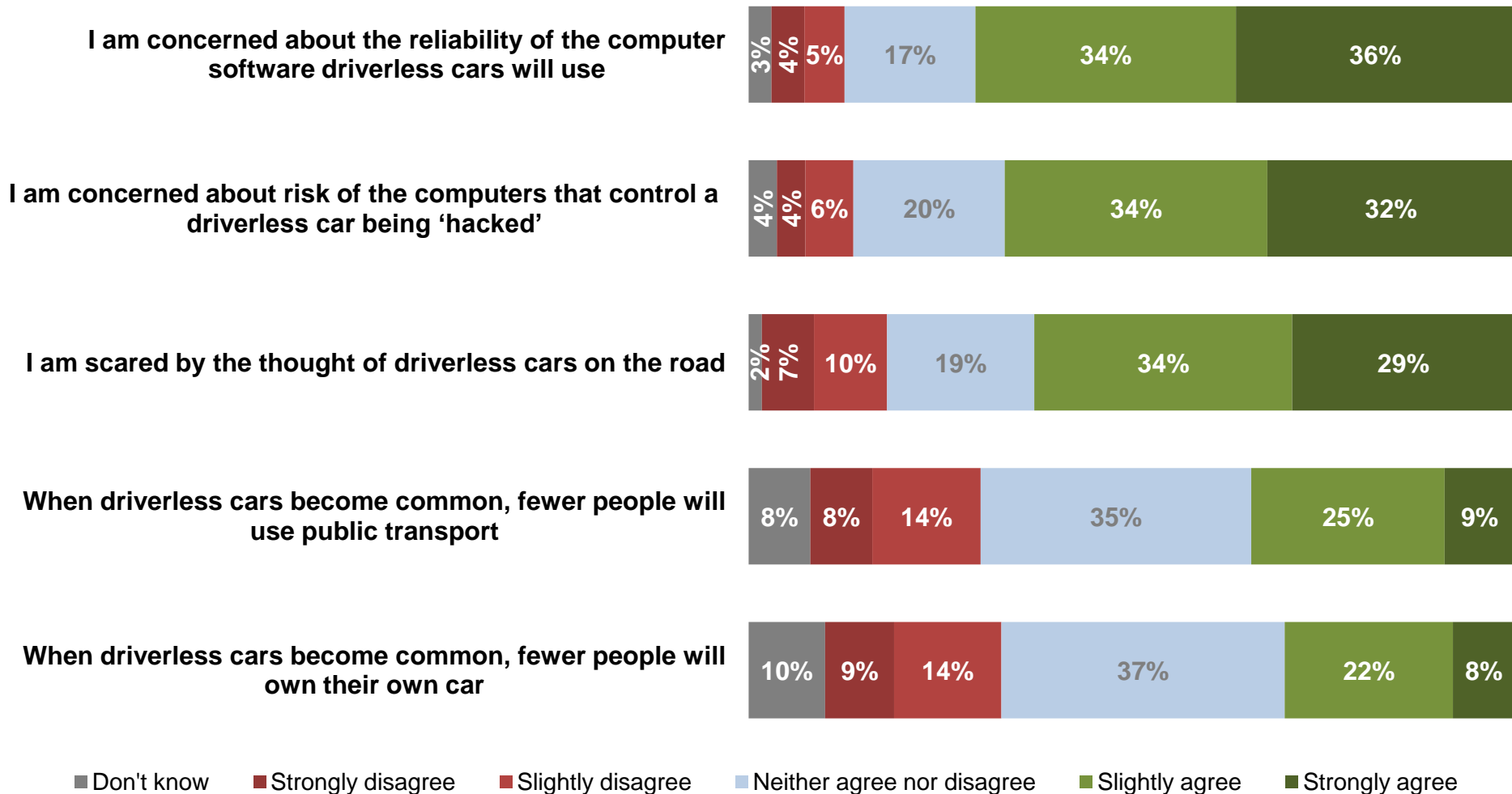
When driverless cars will first be available



When driverless cars will outnumber conventional vehicles

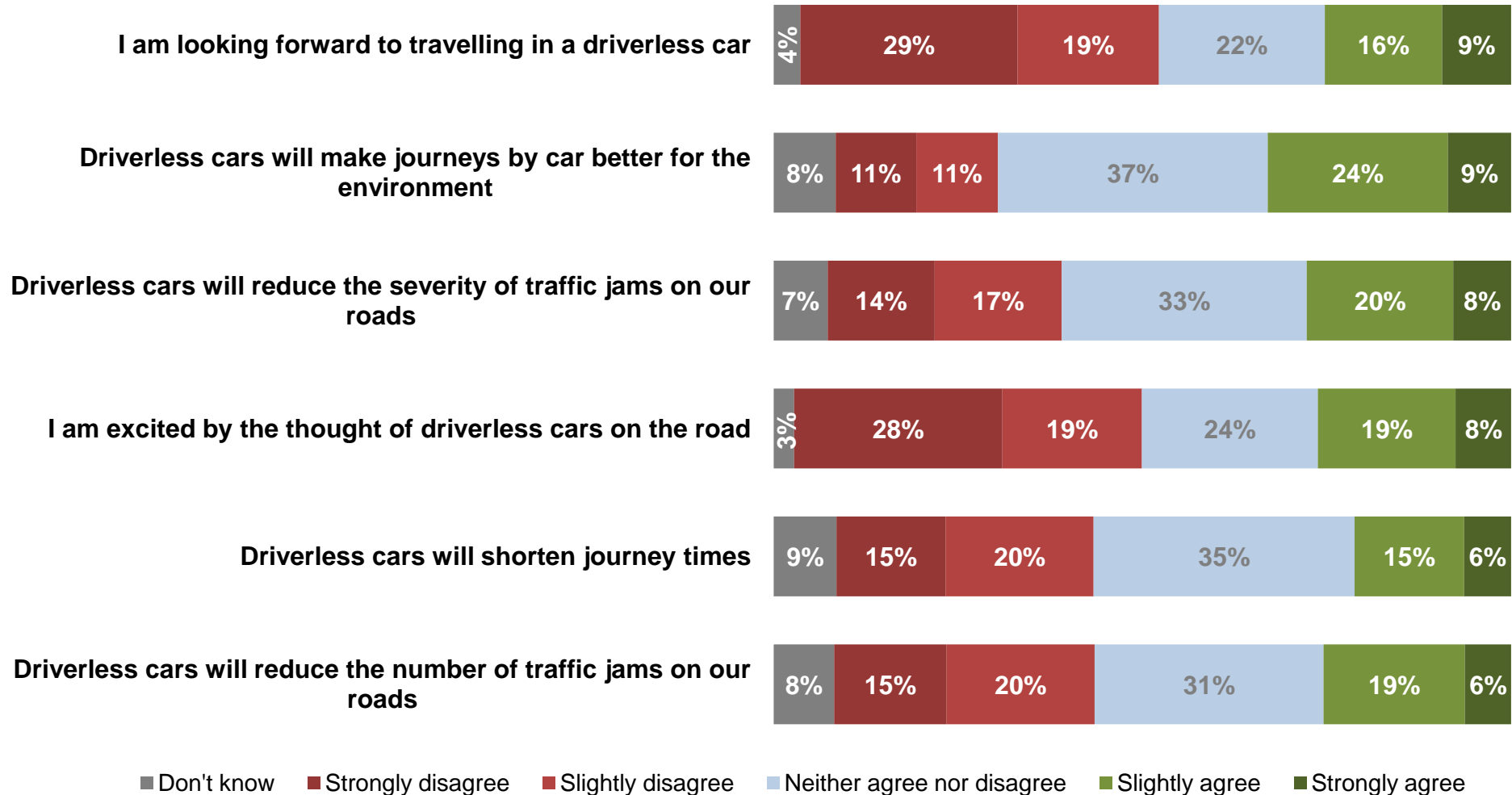


Cars of the future (3) – focus on driverless cars



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

When lane closure is indicated by a red “X” displayed on overhead signs, I always comply



• Aged 65+ (95% agree)

When speed restrictions are imposed (e.g. in response to an incident or because of bad weather), I always comply



• Older drivers more likely to agree
• Northern Ireland (91% agree)
• North East (89% agree)

I understand all of the pictograms displayed (such as the one shown on the image you have just seen)



• Yorkshire & The Humber (78% agree)

I find the travel time estimates useful



• North West (73% agree)

I trust the accuracy of the displayed information about road incidents



• Northern Ireland (85% agree)
• Scotland (79% agree)

The accuracy of the information displayed on variable message signs has improved over the last 12 months



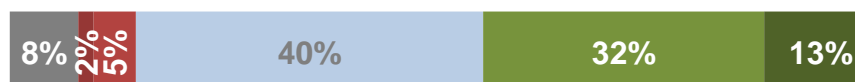
• Younger drivers more likely to agree

I trust the accuracy of travel time estimates displayed



• Younger drivers more likely to agree
• Northern Ireland (70% agree)
• South West (67% agree)

The relevance of the information displayed has improved over the last 12 months

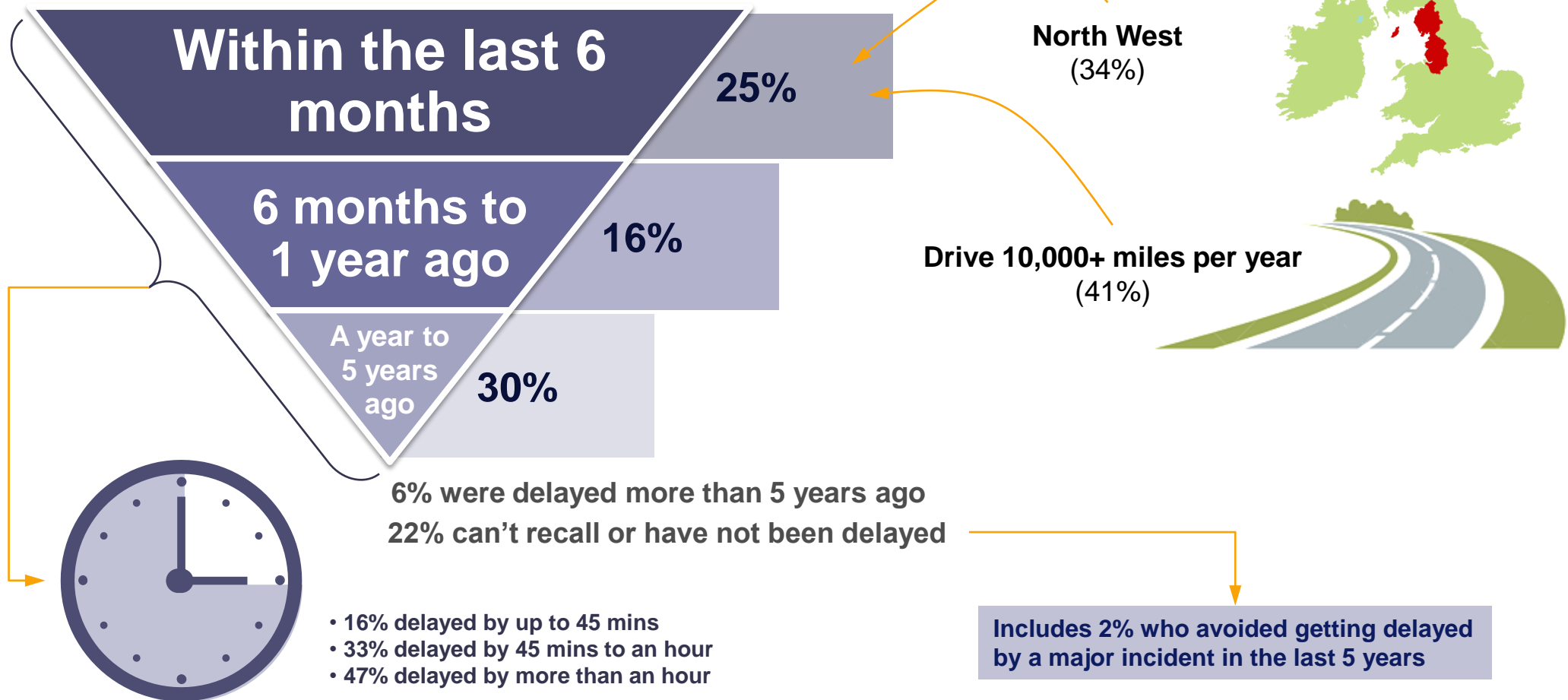


• Aged 17-24 (55% agree)

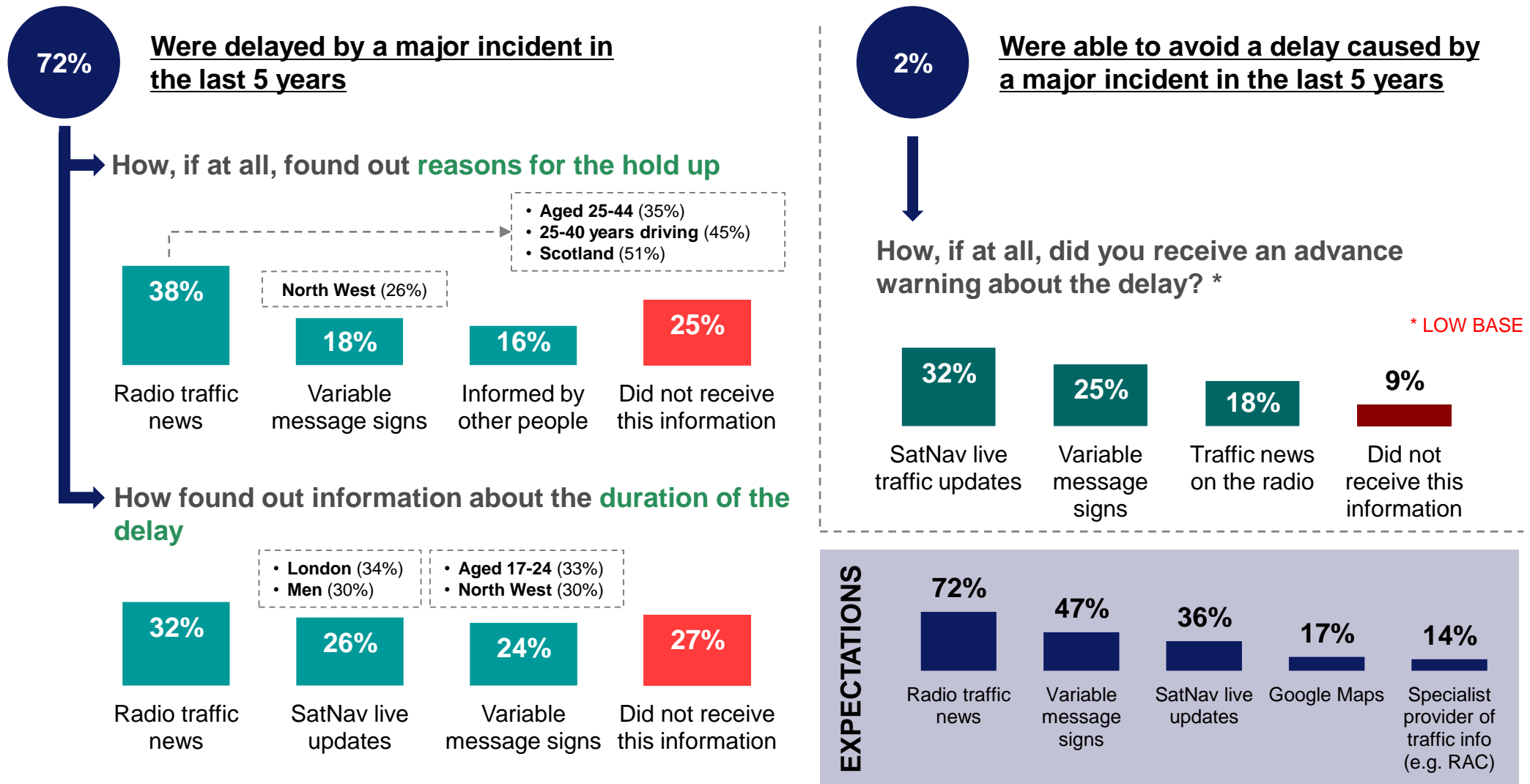
■ Don't know ■ Strongly disagree ■ Slightly disagree ■ Neither agree nor disagree ■ Slightly agree ■ Strongly agree

Occurrence and impact of major incidents

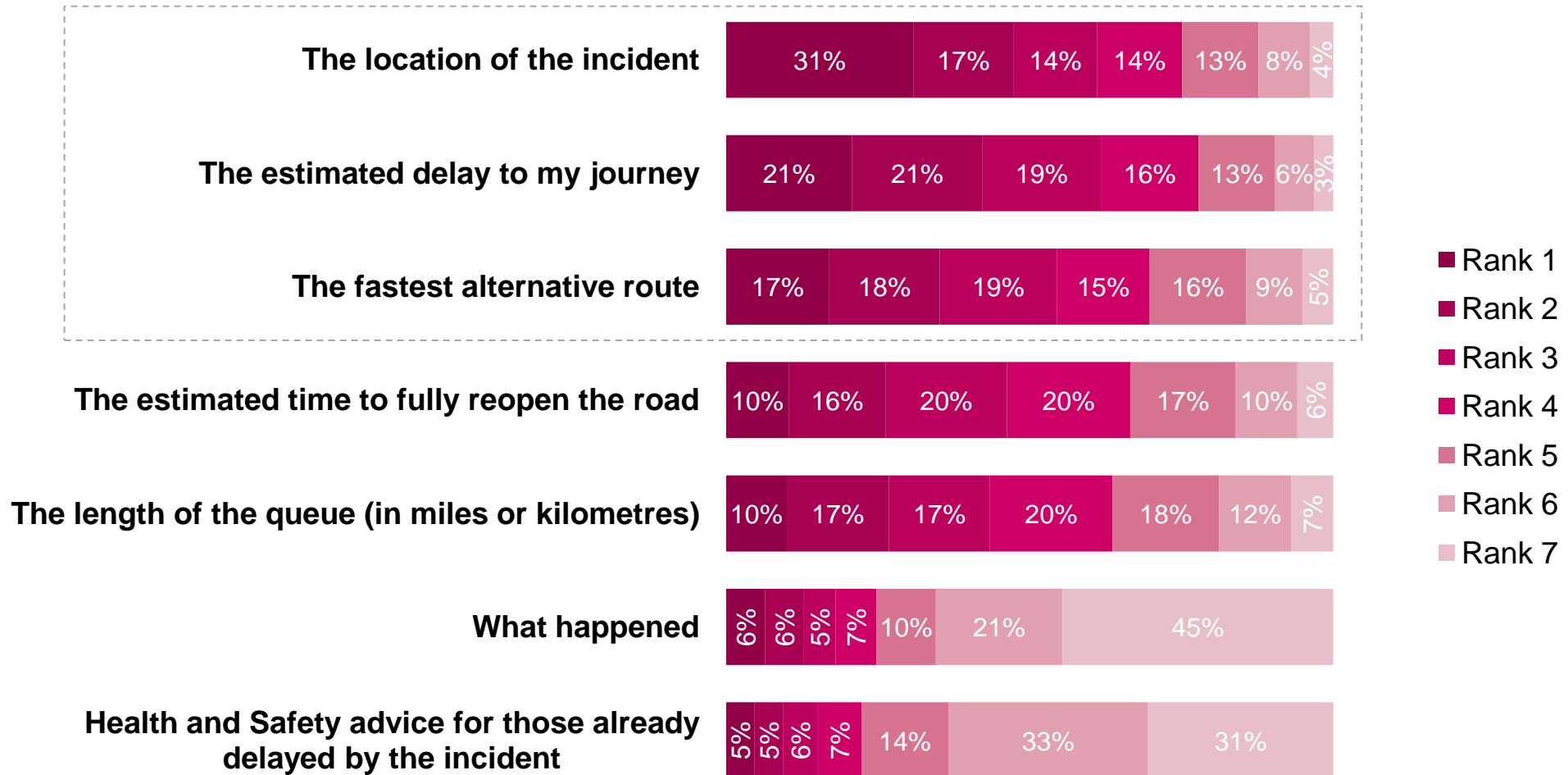
Delayed by a major incident...



Information about major incidents



Importance of information during a major incident



Safety and rules

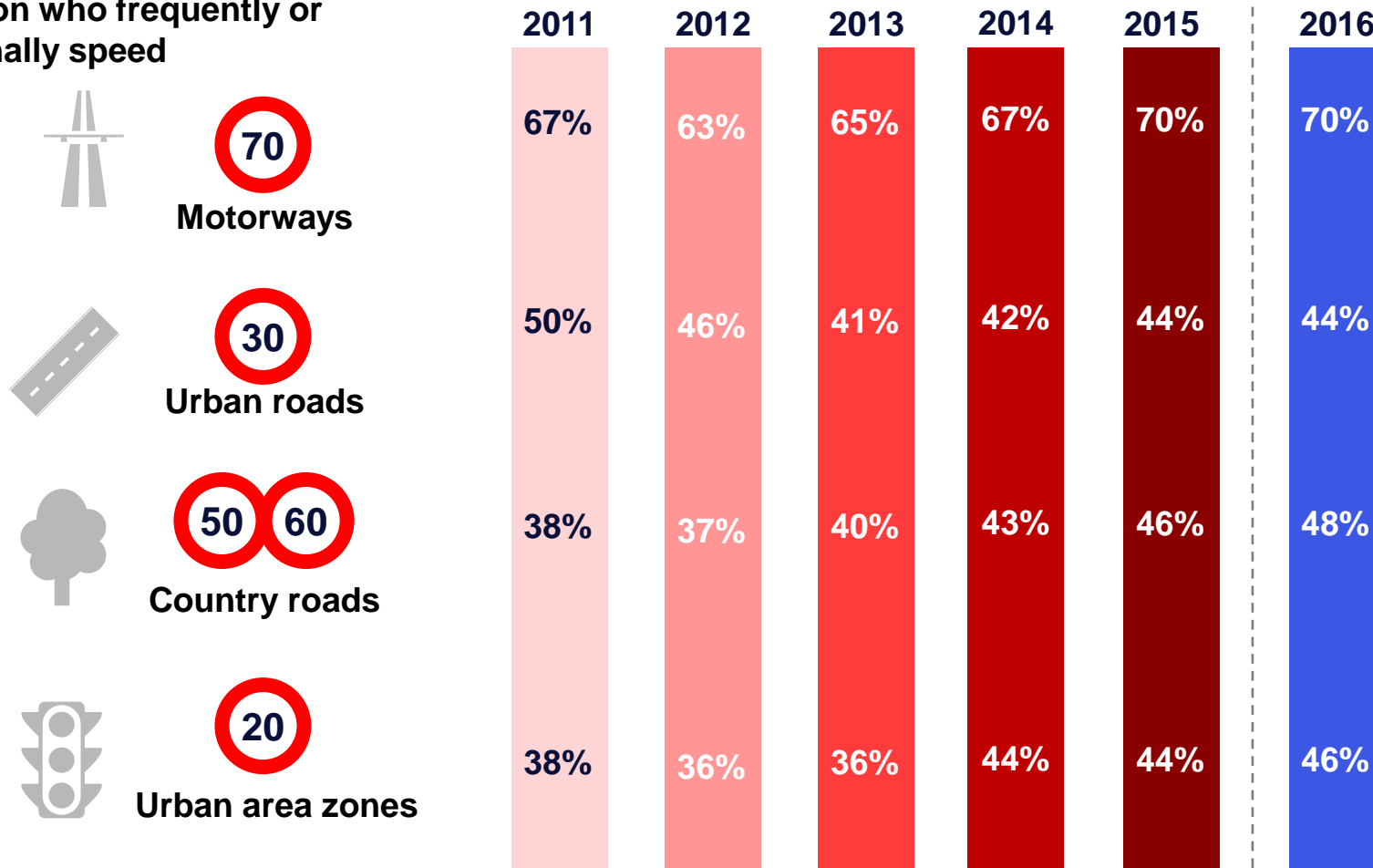
6

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

Breaking the speed limit

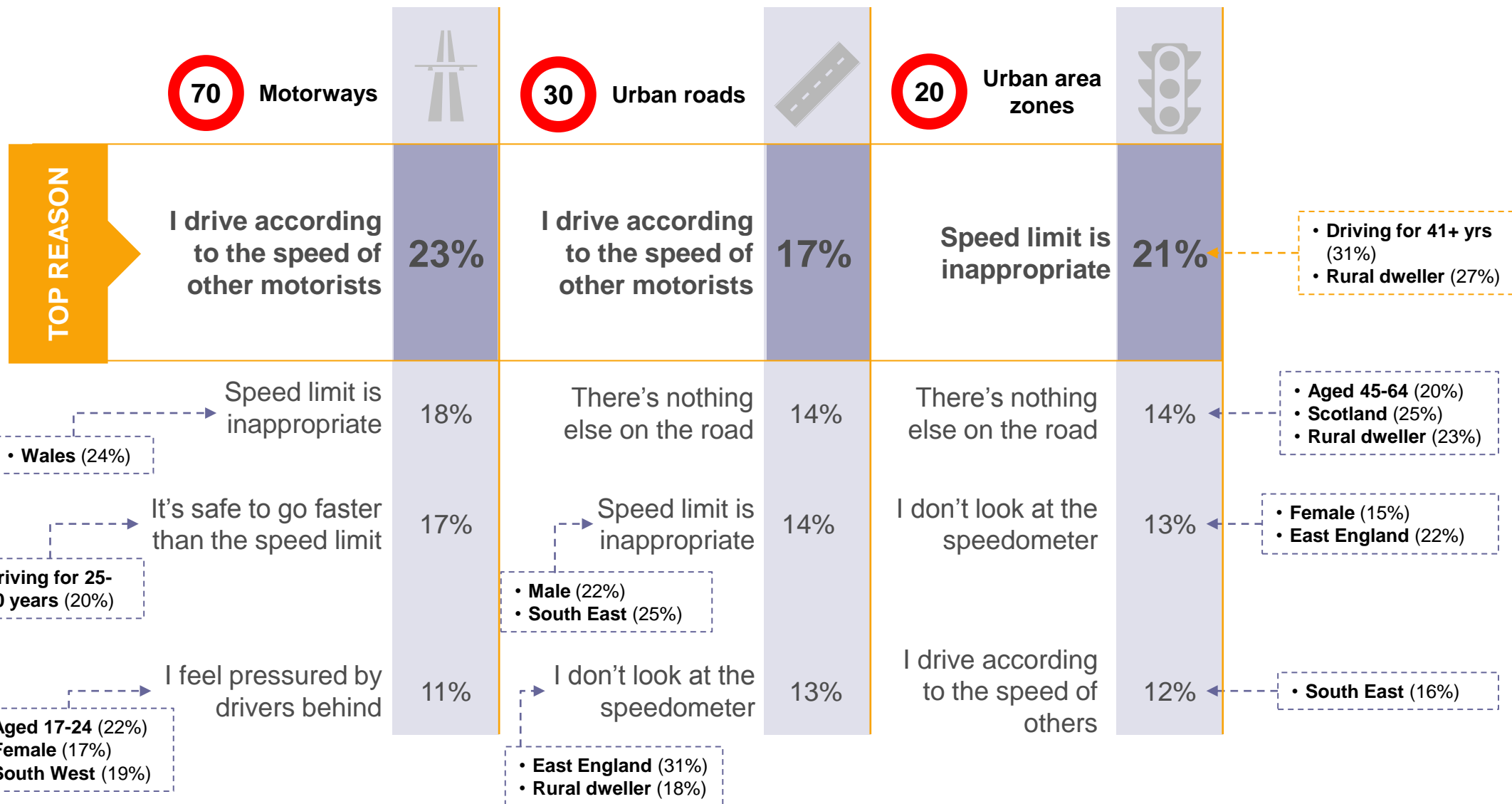
Tendency to break the speed limit increases gradually year on year.

Proportion who frequently or occasionally speed

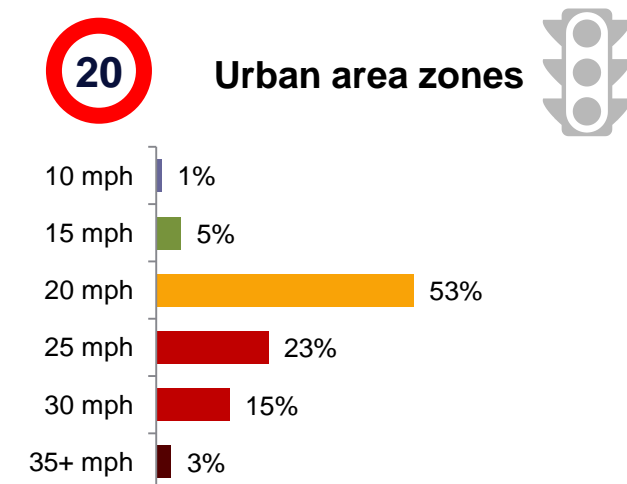
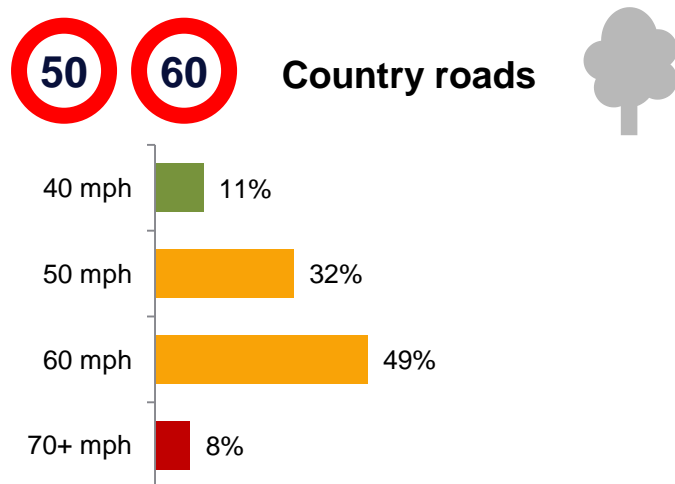
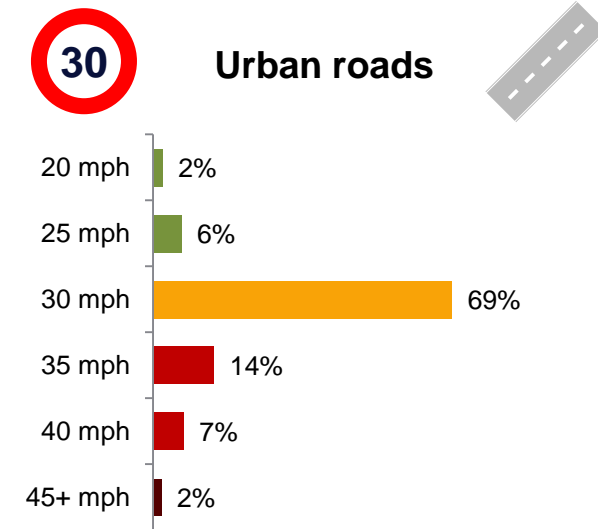
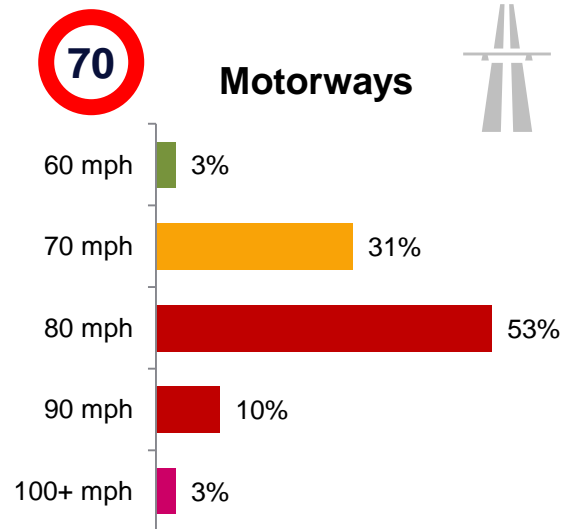


QSI10 And how often do you break the speed limit? 2016, all respondents- 1714; 2015 (1555); 2014 (1526); 2013 (1542); 2012 (1002); 2011 (1002). Bases vary marginally for each road type. Please refer to the tables for exact figures.

Reasons for breaking the speed limit



Motorists' views on maximum speed limits



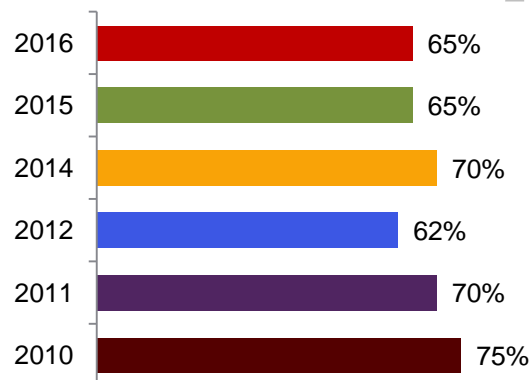
QSI12 . What in your opinion should the maximum speed limit be on the following types of road: a) motorways; b) urban roads; c) country roads; d) urban area zones. Bases: all respondents (1714).

Maximum speed limits - over time



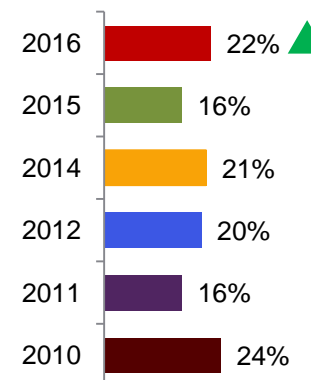
Motorways

% saying more than 70mph



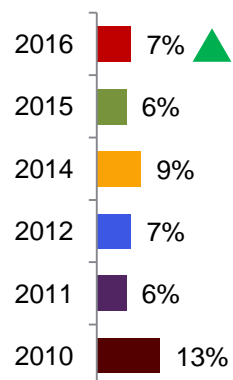
Urban roads

% saying more than 30mph



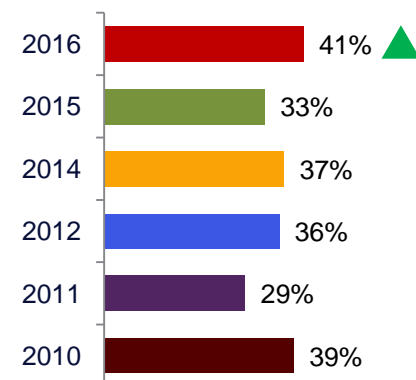
Country roads

% saying more than 60mph



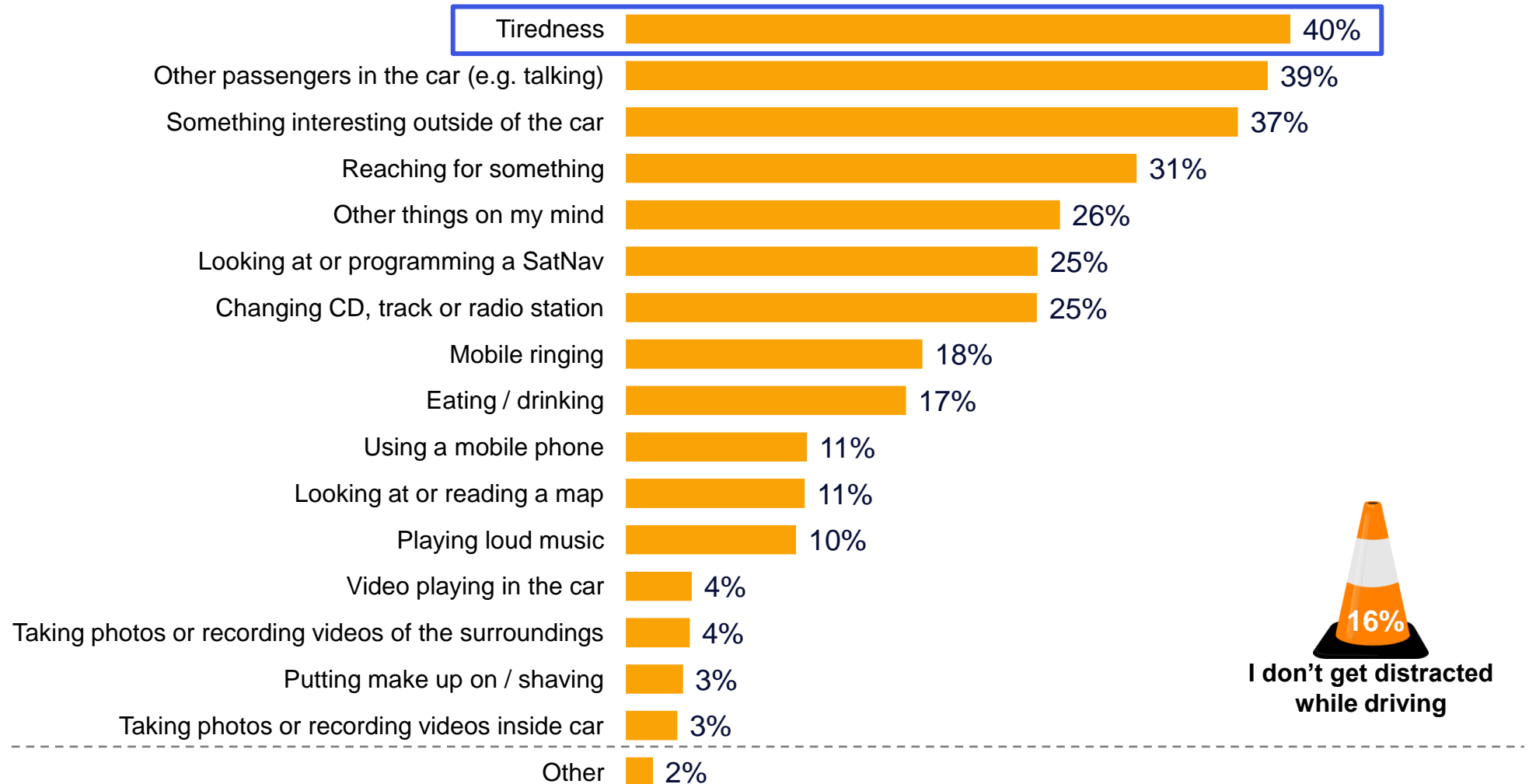
Urban area zones

% saying more than 20 mph



Distractions while driving (1)

Tiredness is the number one distraction for drivers.

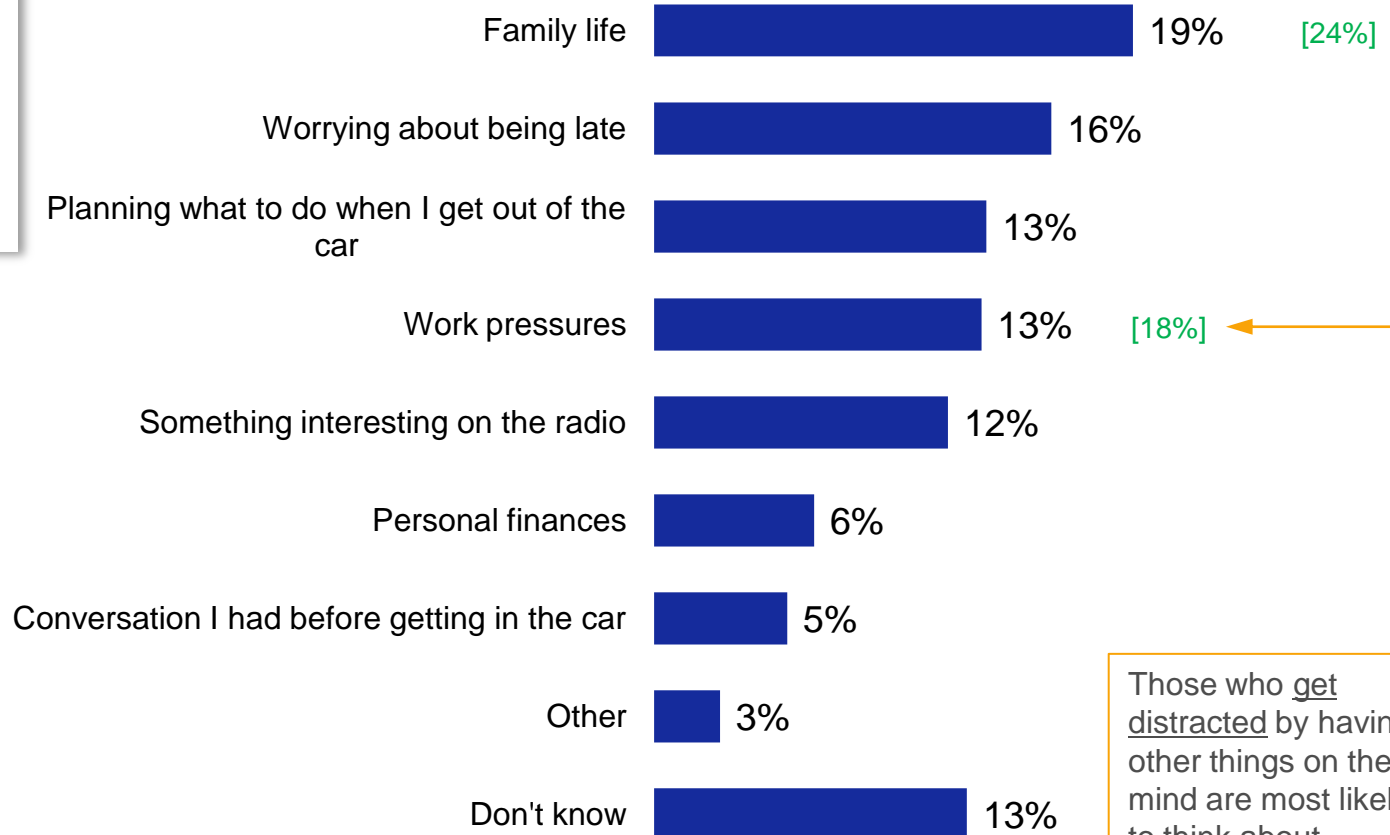


Distractions while driving (2)

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



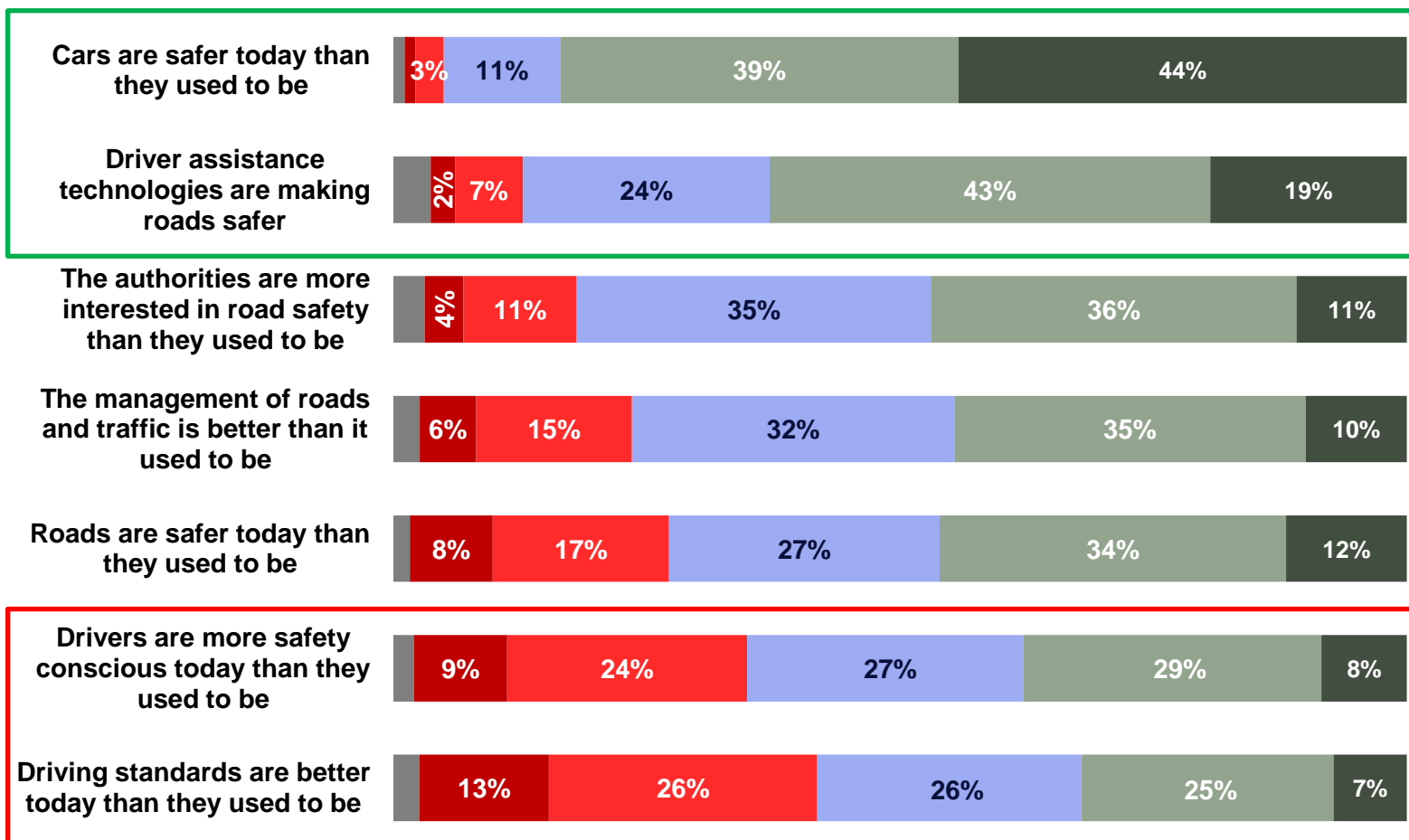
Potential distractions include...



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

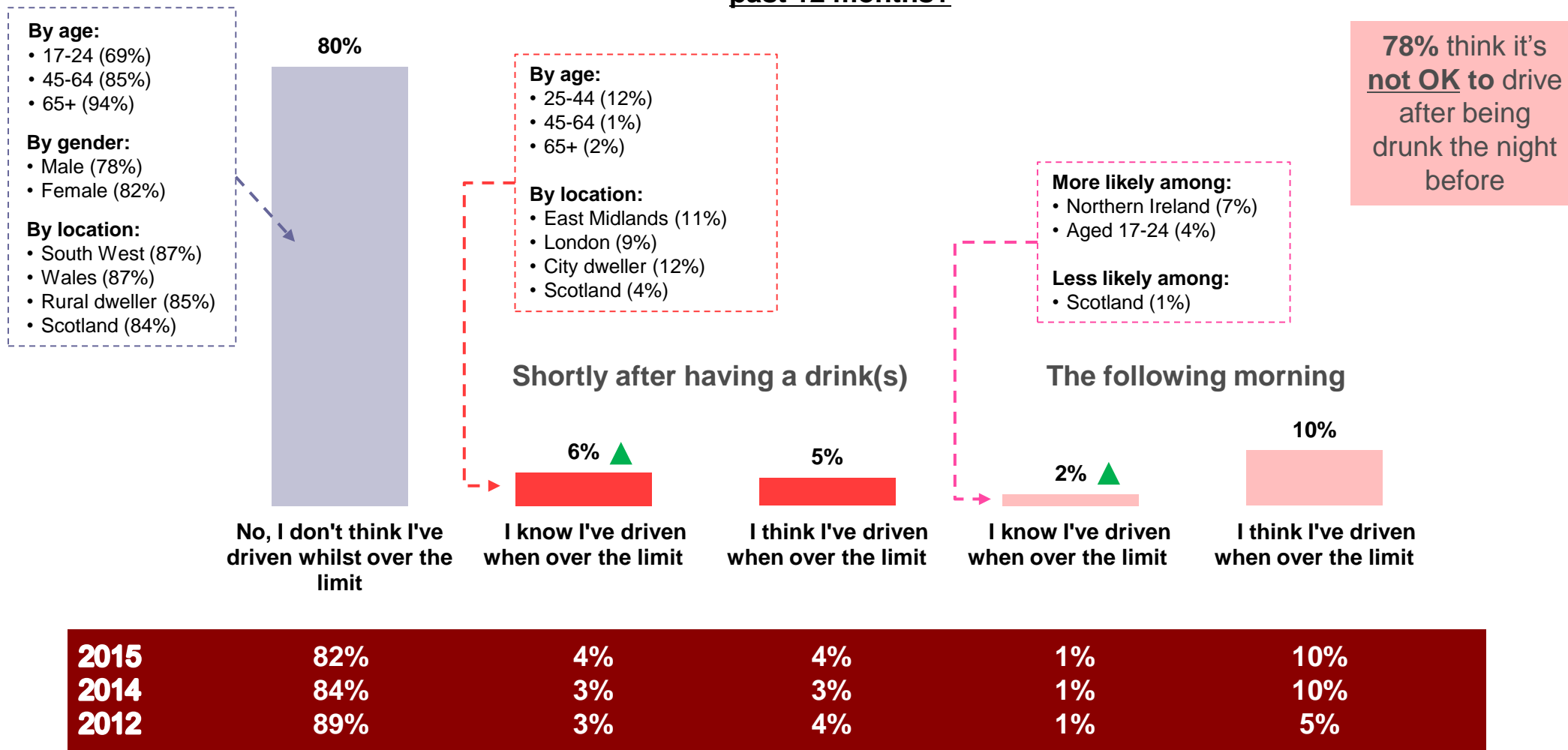
Drink and drug driving

7

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

Incidence of drink driving

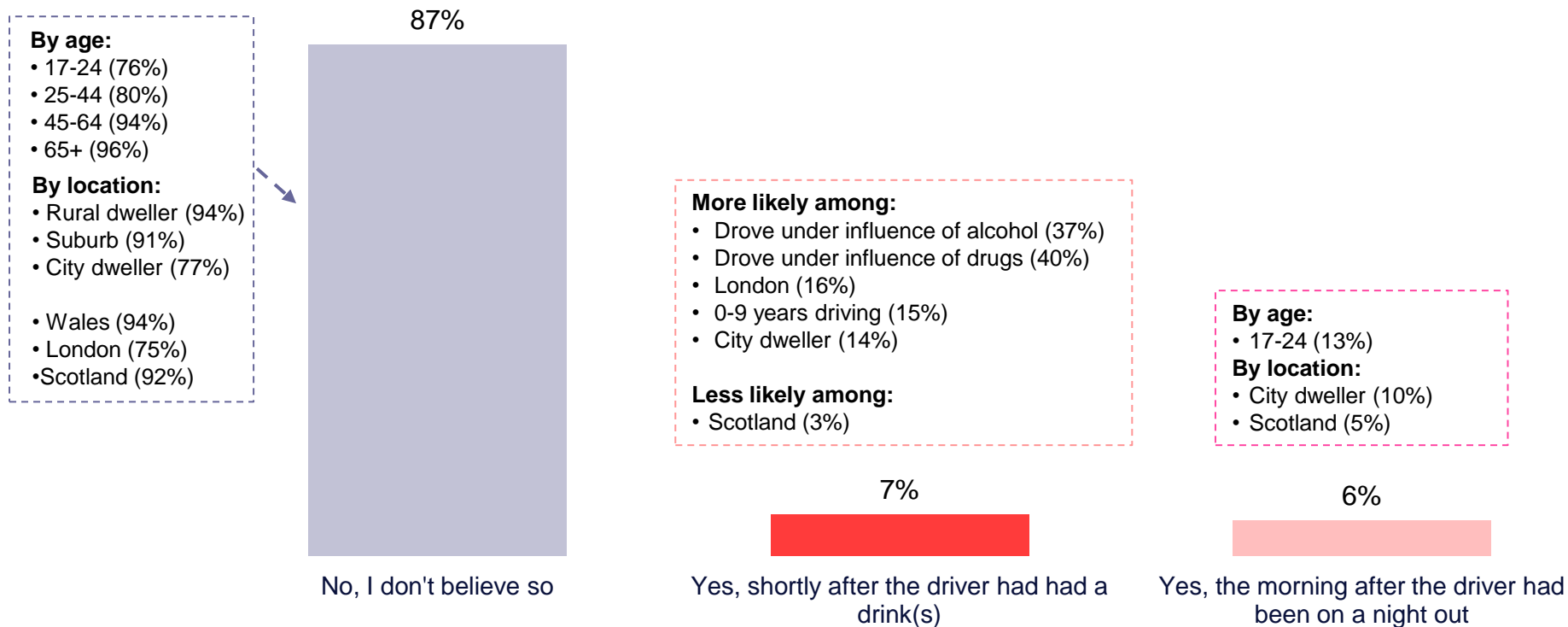
Have you driven when you believed you were above the drink drive limit in the past 12 months?



QSI3. In the past 12 months have you driven when you believed you were over the drink-drive limit, even just a little? Bases: All respondents 2016 (1714), 2015 (1555), 2014 (1526) 2012 (1002) 2011 (1002).

Drink-drive passengers

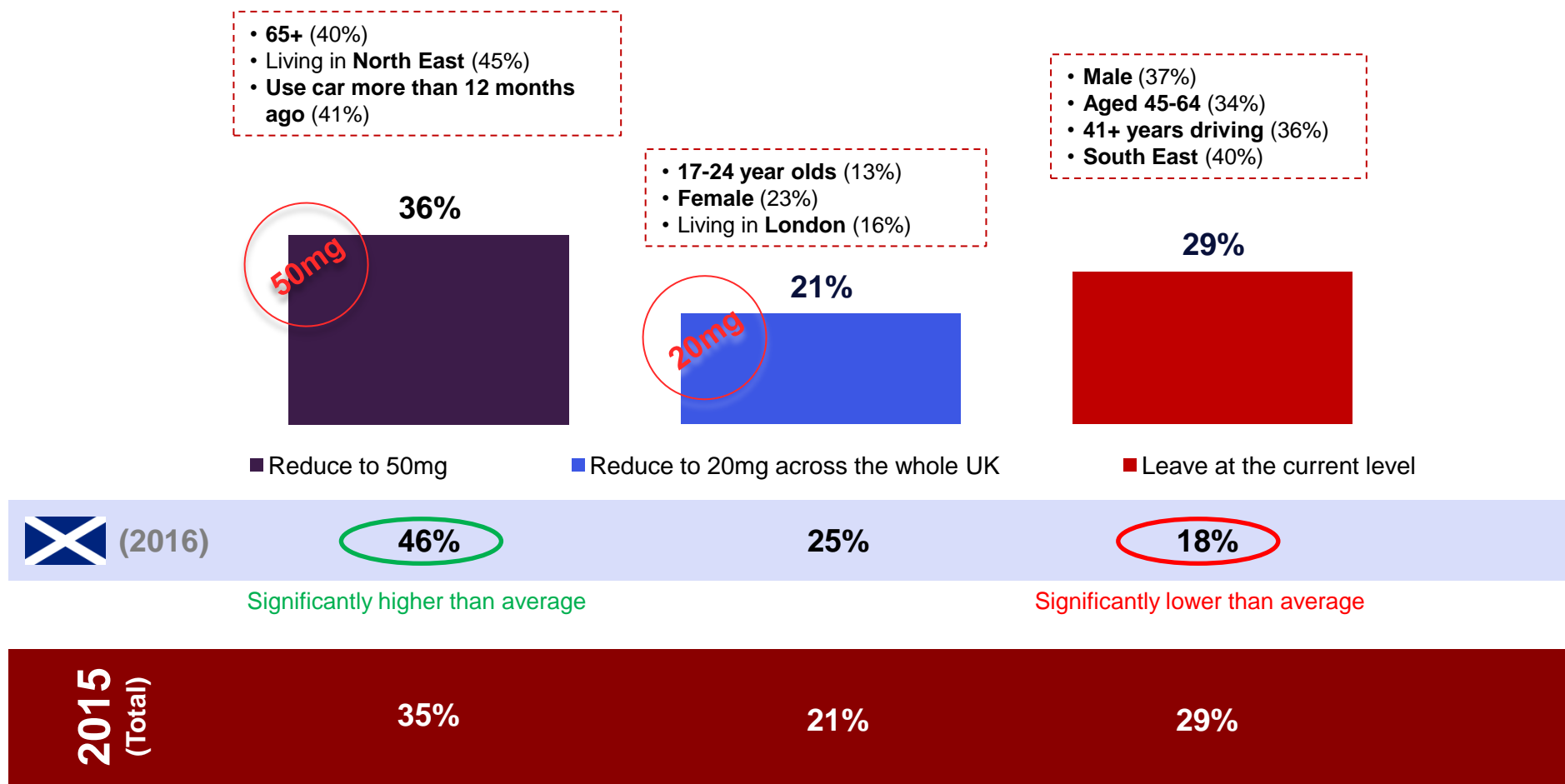
Have you ever been in a car when the driver was above the drink drive limit?



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

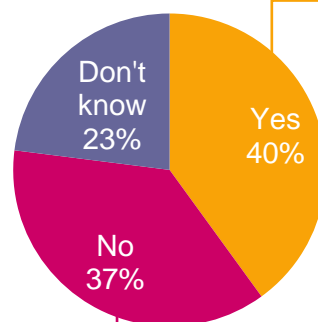
QSI4. In the past 12 months have you been in the car when the driver was over the drink drive limit? Bases: All respondents – 2016 (1714), 2015 (1555), 2014 (1526), 2012 (1002), 2011 (1002).

Changing the legal alcohol limit (1)



Changing the legal alcohol limit (2)

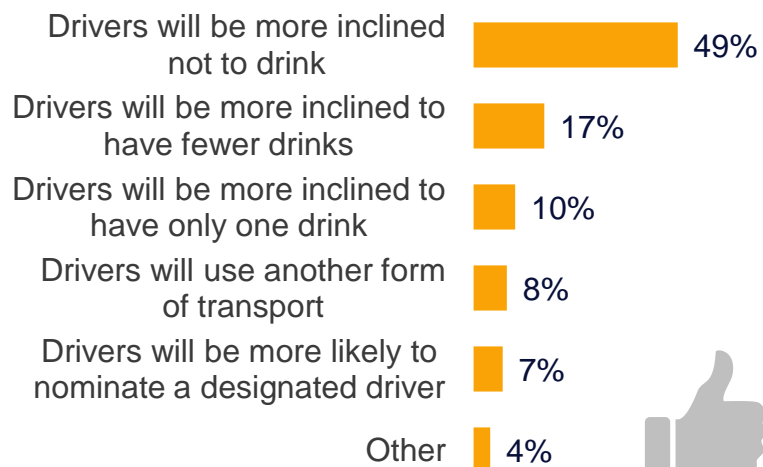
Will changing the drink drive limit make a difference to drink drivers on the roads?



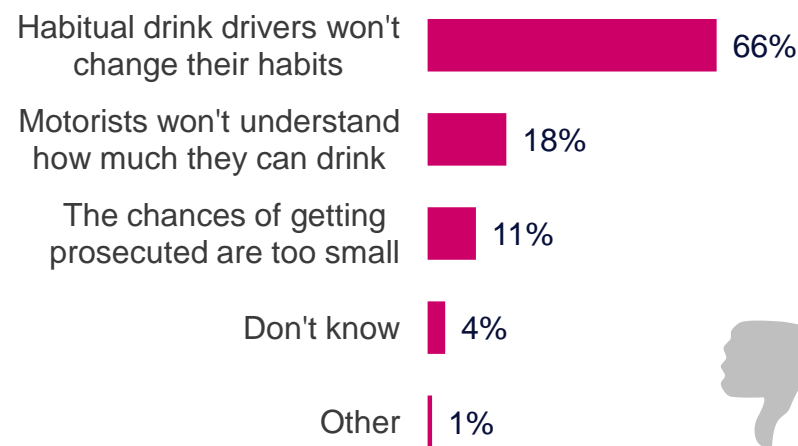
- **Scotland** (60%)
- **Driven under influence of drugs** (48%)

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

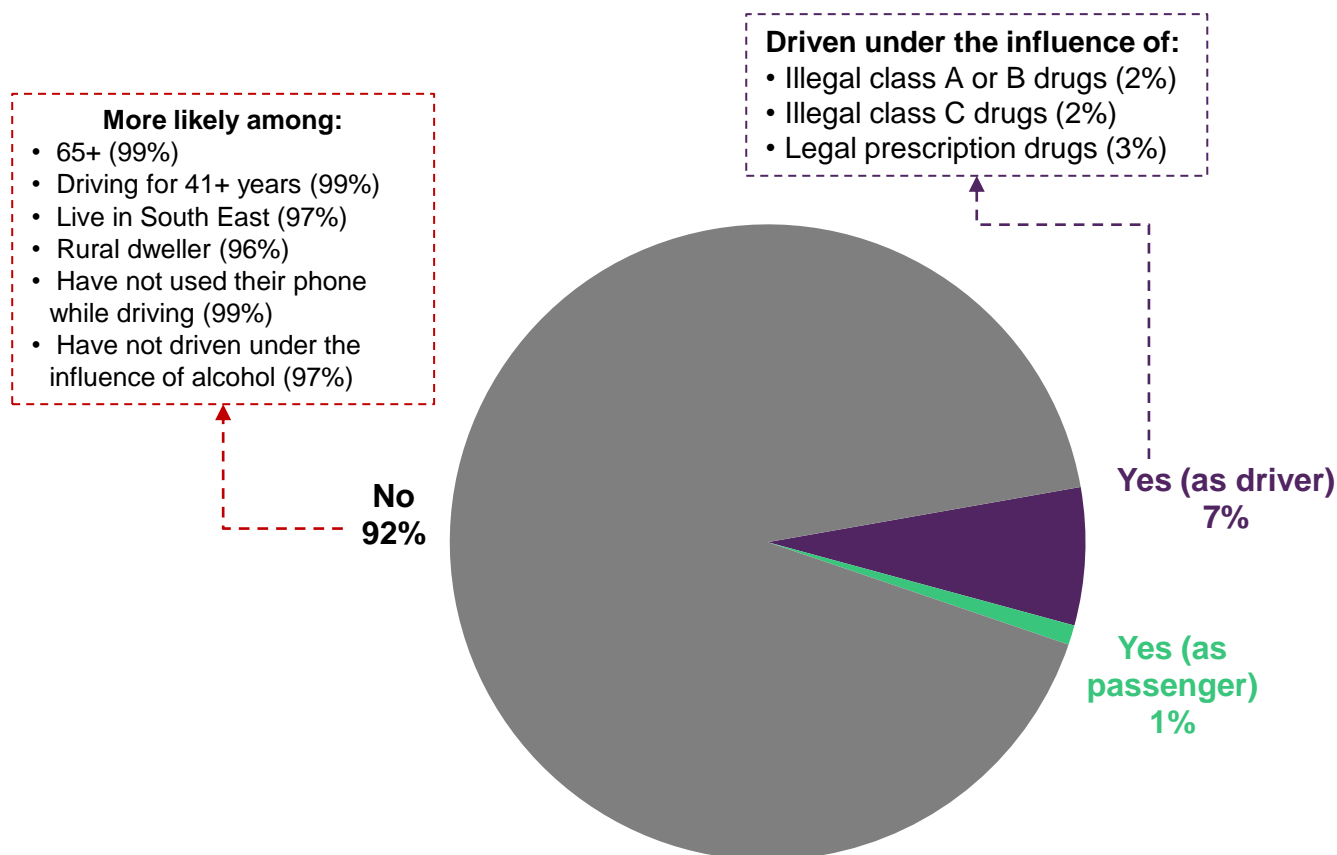
Why changing the limit will make a difference



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

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

Hand-held mobile phone usage on the roads

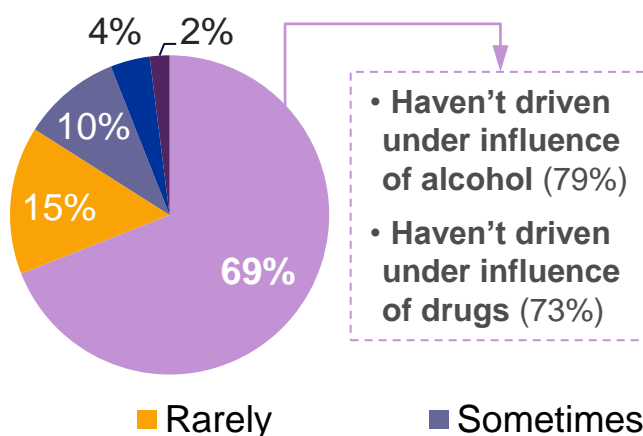
8

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

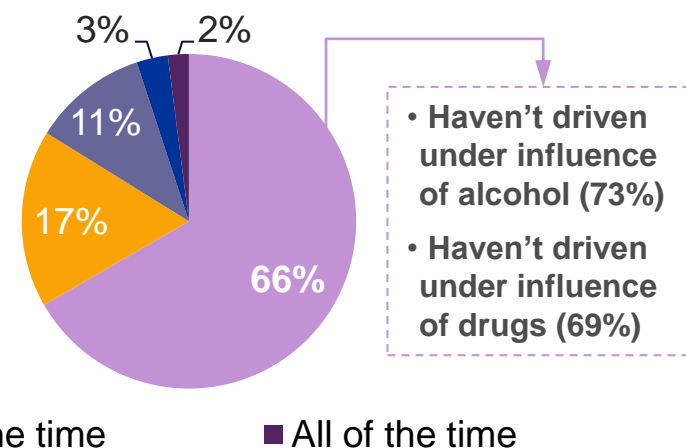
Frequency of mobile phone usage without hands-free

Making or receiving calls whilst driving

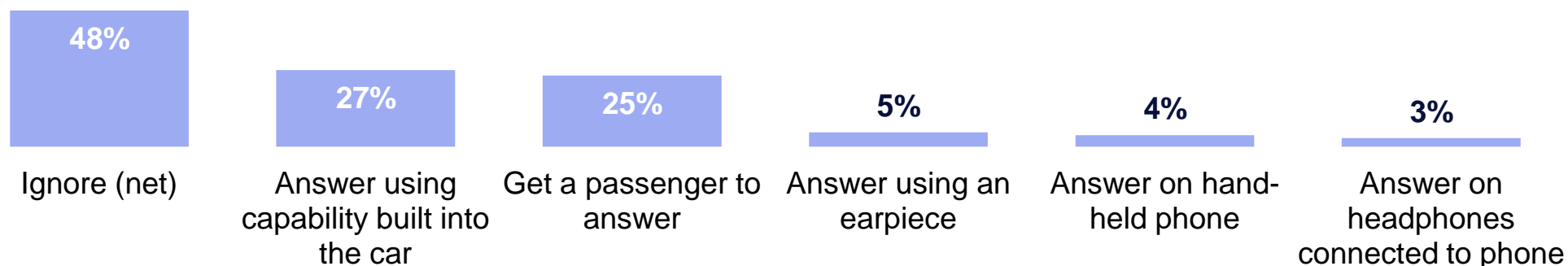
Used mobile
while driving
without hands
free



In car while
driver used
mobile
without
hands free



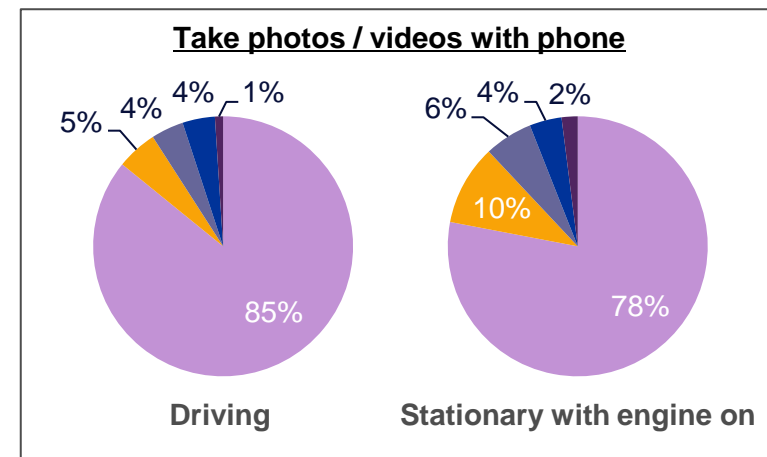
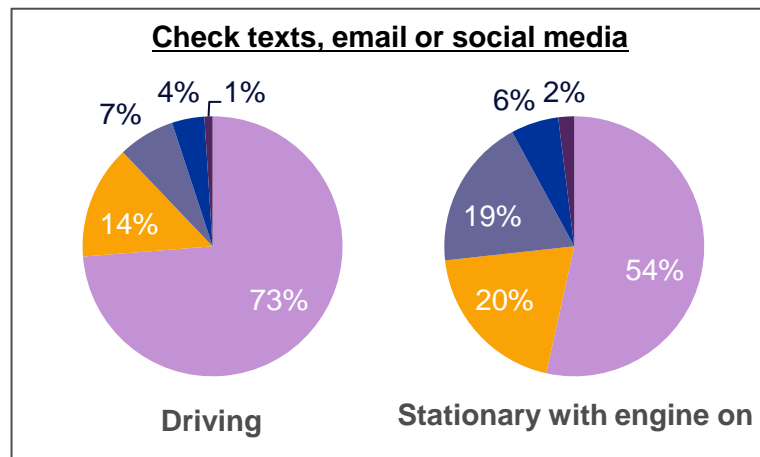
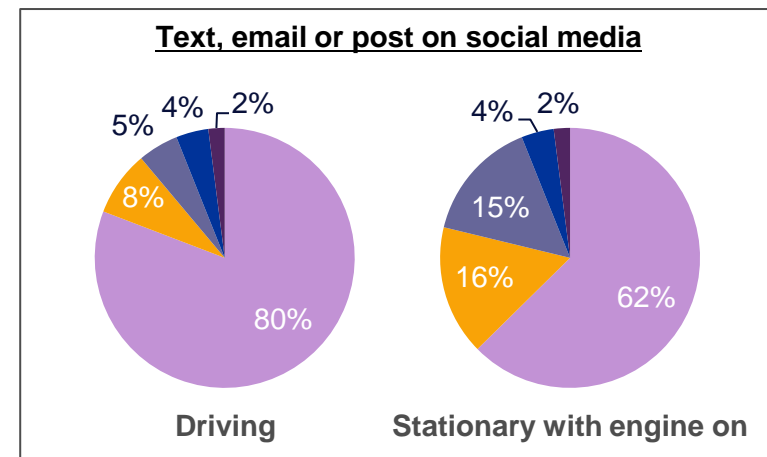
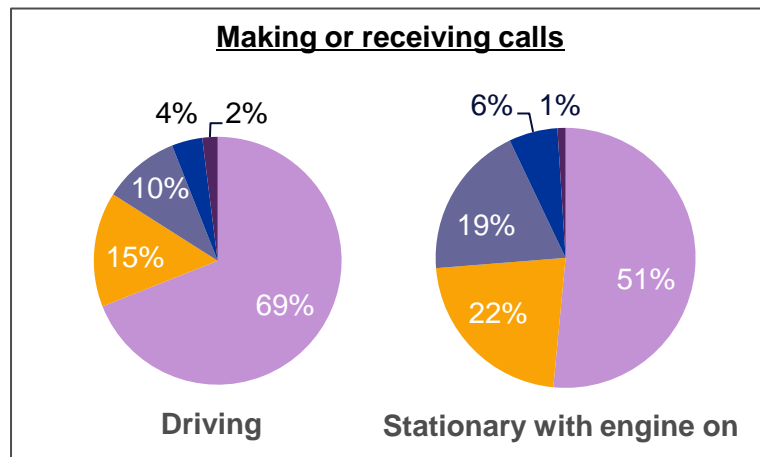
What drivers would do if they were to receive a phone call while driving...



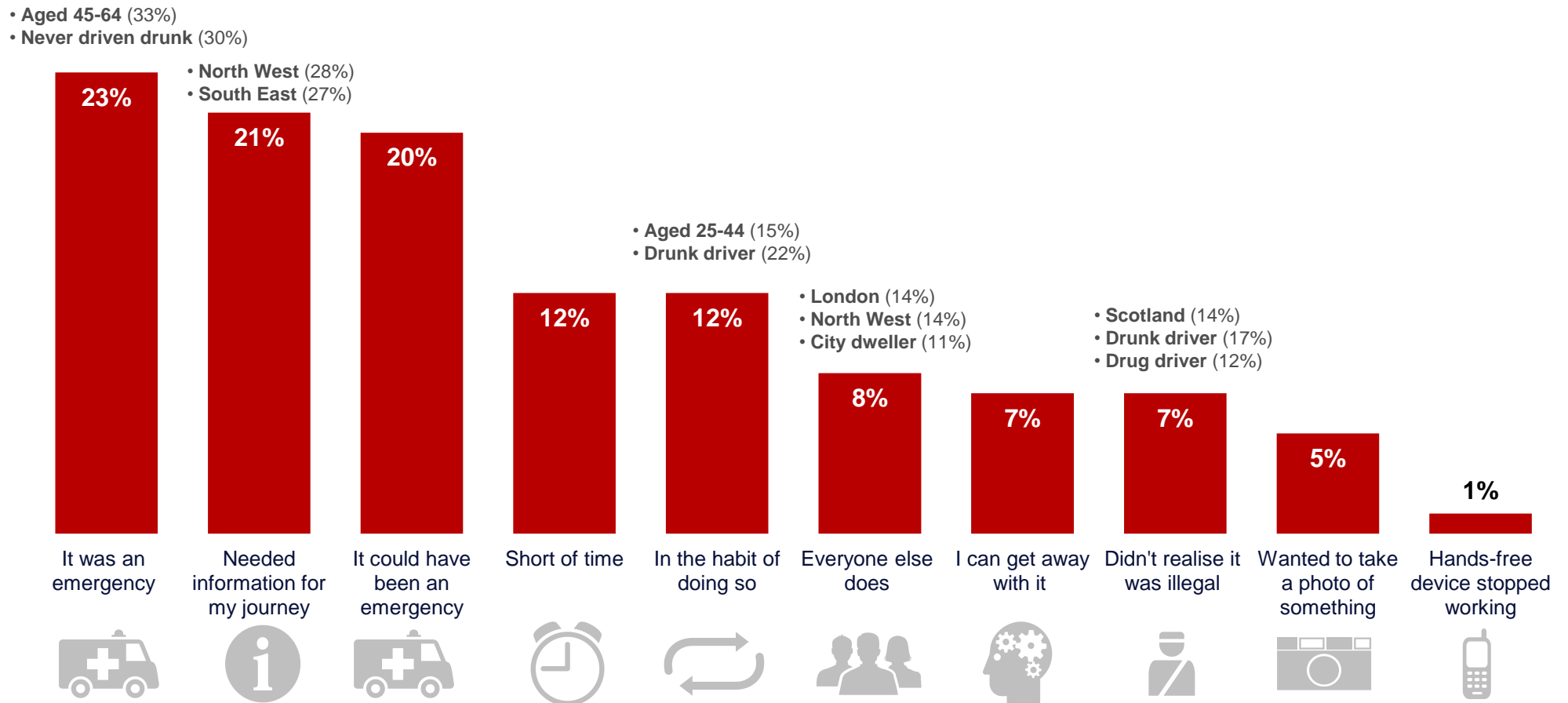
Nature of mobile phone usage while in the car (without hands-free)



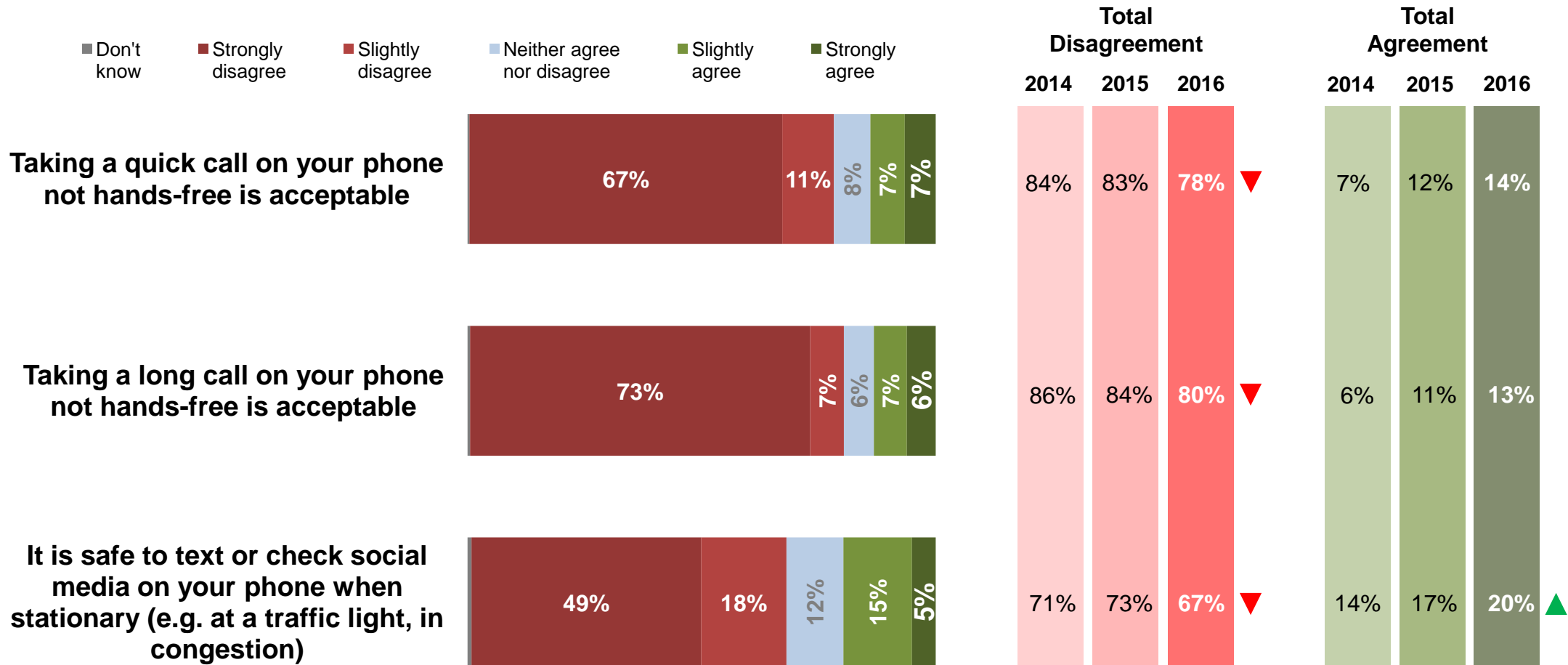
■ Never
 ■ Rarely
 ■ Sometimes
 ■ Most of the time
 ■ All of the time



Reasons why used hand-held mobile phone while driving



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



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



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