



RAC Report on Motoring 2010

Motorists Survey – Research Presentation

RAC RoM Advisory Group Meeting

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Document prepared for:
RAC RoM Advisory Group

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Presentation order

Motorist survey 2010

- Methodology
- Sample

Key findings

- From 2010 survey
- Supplemented with data from 2008 and 2009 and 2010

1. About the motorist, setting the scene & gauging the mood in 2010
2. The environment & electric vehicles
3. Safety on the road
4. Older drivers
5. Driving under the influence
6. Congestion on the road
7. Taxation
8. Speeding
9. Focus for new government

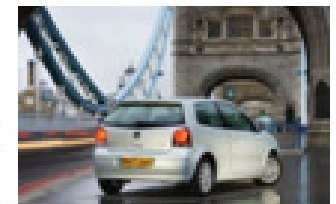
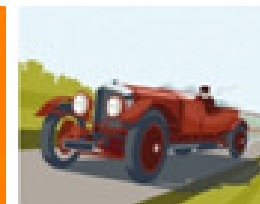
Introduction

Quadrangle has been commissioned to deliver the RAC Report on Motoring 2010 having conducted the research since 2007.

The diversity of topics covered in this years RAC Report on Motoring should allow RAC to achieve the following objectives:

1. continue to raise the profile of RAC with key stakeholders
2. deliver high level media coverage in broadcast and print with both a national and regional focus
3. provide a breadth of information that can be used and implemented at appropriate times
4. support brand objectives

This document presents research findings that will help create the RAC Report on Motoring 2010.



Methodology:

A total sample of 1,150 motorists:

- 1,150 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 (9%)



Survey methodology:

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

Fieldwork dates

- Tuesday 16th March – Wednesday 24th March 2010

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

- Significantly higher 
- Significantly lower 

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

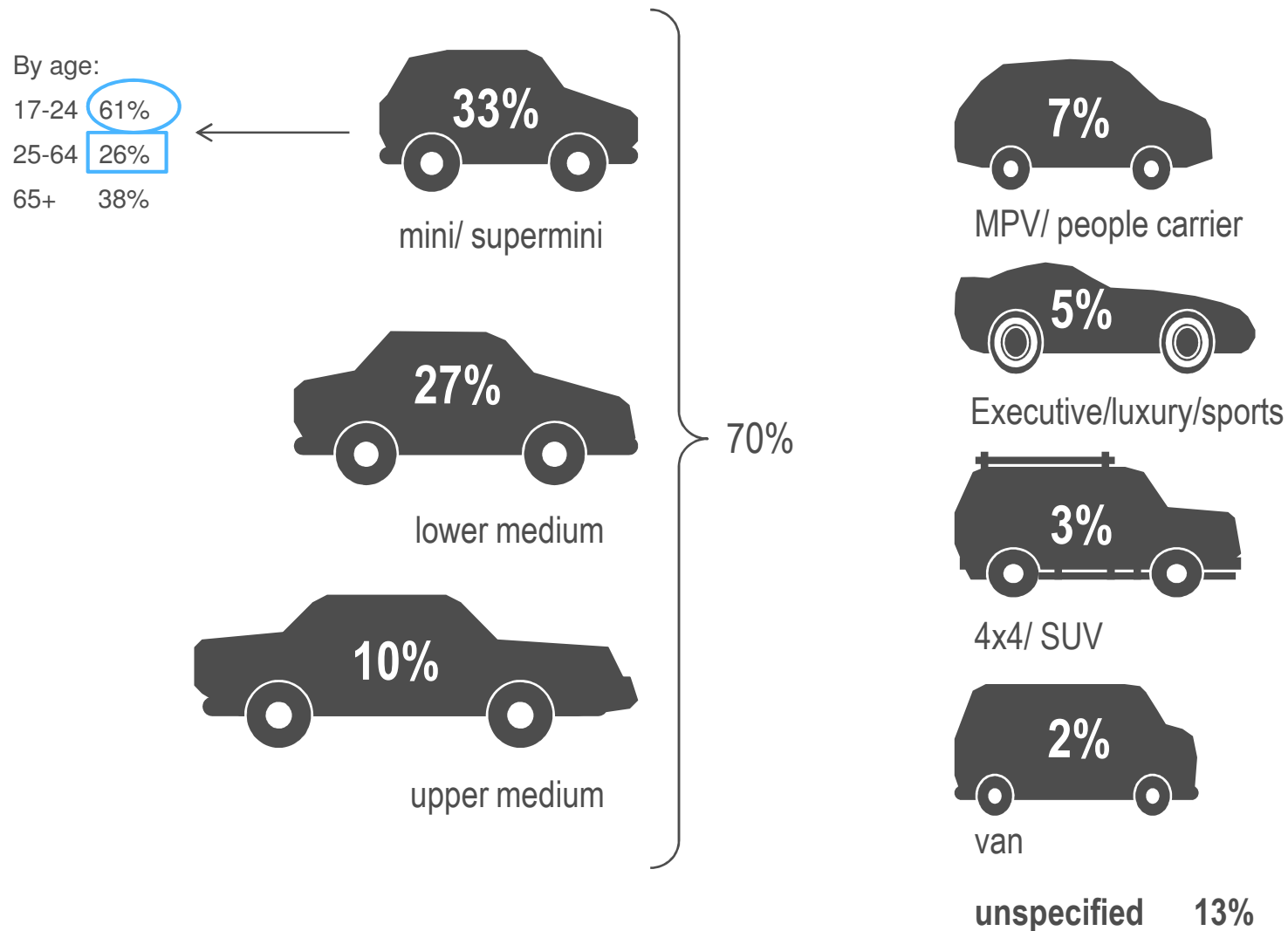


about the motorist

Sample demographics.

		Quota set (n=1,000)	Final Weighted (n=1,150)
Sex	Male	49%	49%
	Female	51%	51%
Age	17-24	13%	13%
	25-44	36%	36%
	45-64	31%	31%
	65-69	20%	12%
	70+		8%
Socio-economic group	ABC1	55%	55%
	C2DE	45%	45%

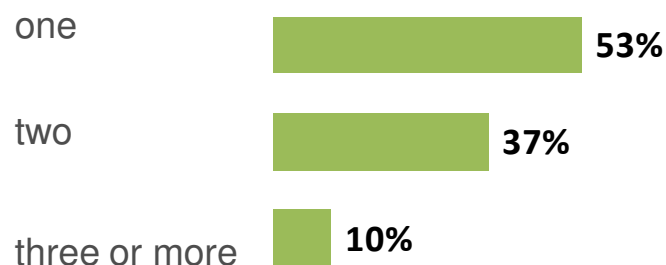
Type of car.



Age and number of cars in household.

Q4. How many cars are there in your household?

Base: those that own a motor vehicle (n=1,147)



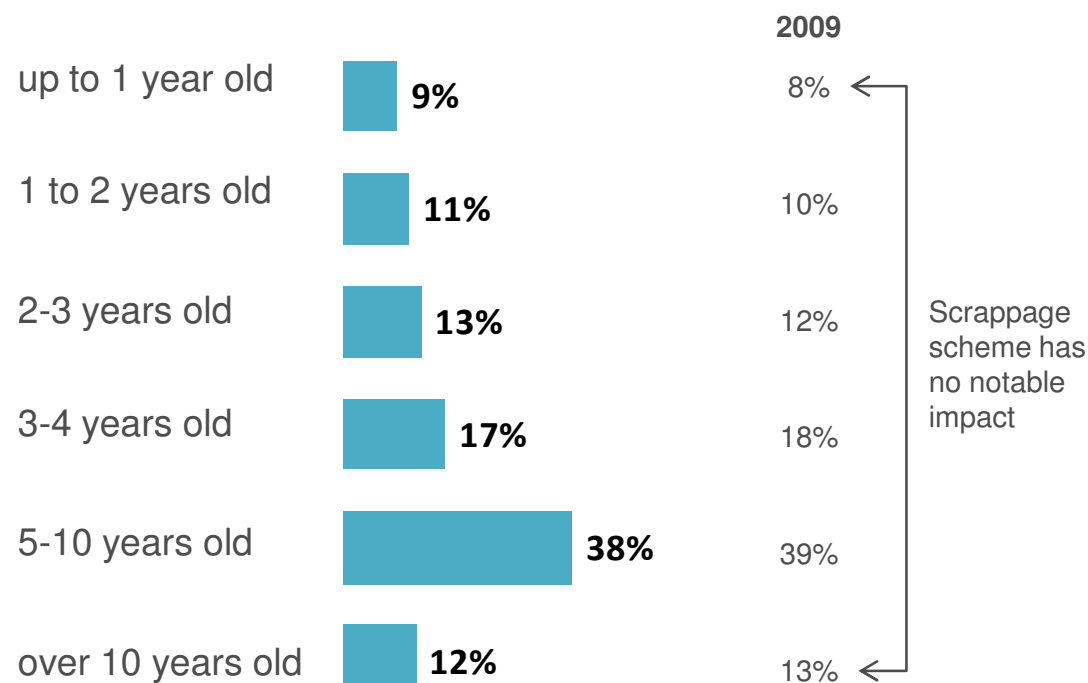
Average 1.6

Average number of cars by age

17-24	2.14
25-44	1.57
45-64	1.64
65-69	1.22
70+	1.23

Q7. Approximately how old is your main car?

Base: those that own a motor vehicle (n=1,147)



Average age 5.5 years old



setting the scene

Other modes of transport.

Walking and being a passenger in a car are the most common modes of transport in the UK outside of driving a car. Overall levels remain stable from 2009 with a slight decline in being a passenger in another car. 17-24 year olds are more likely to use a variety of transportation methods compared to those older.

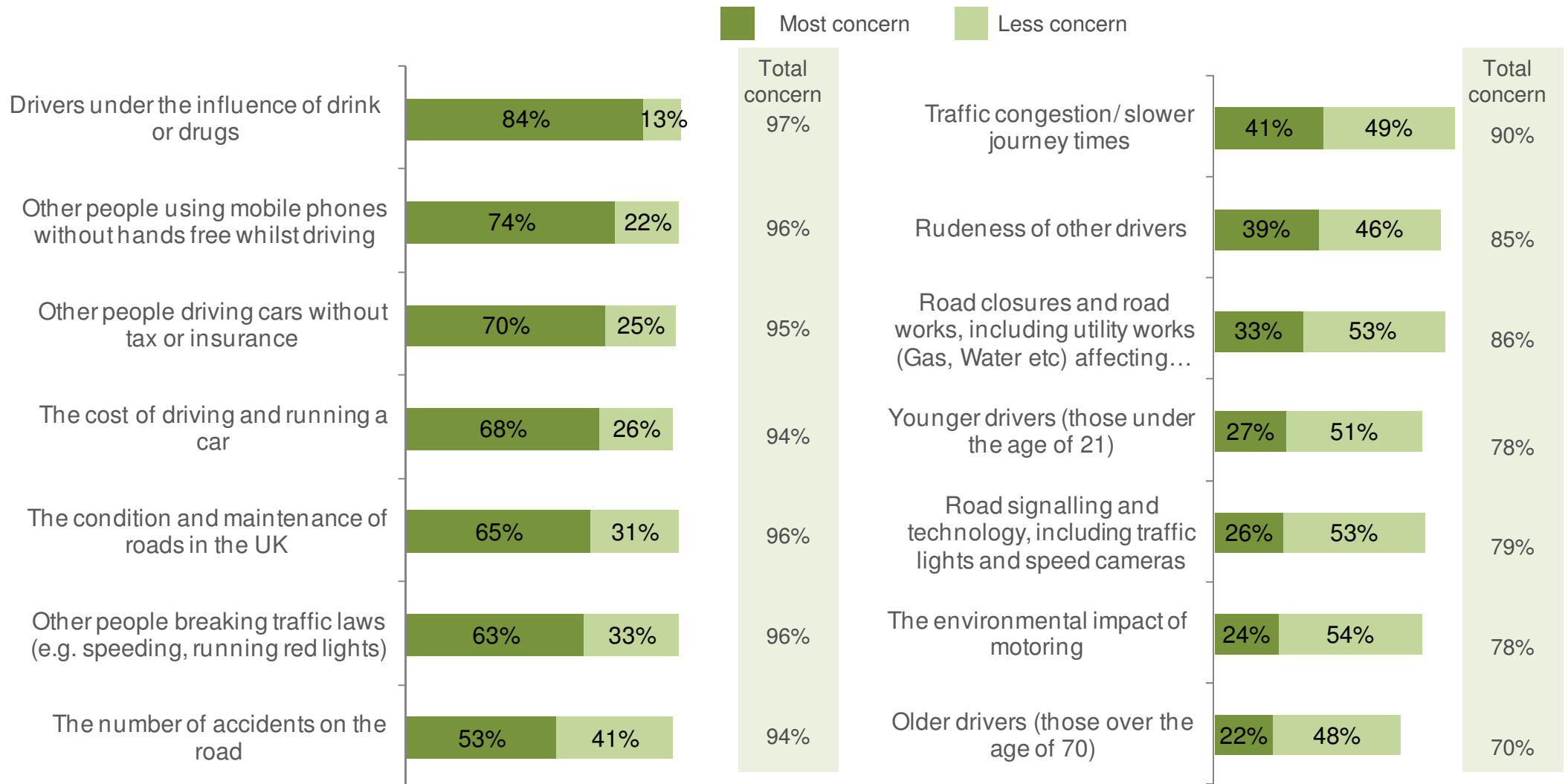
			2009	2010	More likely to be/have...
Walk/pedestrian			93	93	→ <70; female; <10 years driving; city or suburb
Passenger in car	2007	2008	92	87	→ 17-24; ABC1; female; have 2+ cars
Public bus/coach/tram	50	62	69	66	→ 17-24 & 65-69; Male; ABC1; London, city & suburb
Train/ tube	n/a	56	67	65	→ 17-24; ABC1; from London
Taxis	n/a	57	66	64	→ 17-24; Female; ABC1; a city
Ride bicycle	25	29	35	33	→ 17-24; Male; ABC1; London & East; city; kids in household; low car dependency
Park & ride			35	32	→ ABC1; low car dependency; a city or village
Car sharing* (i.e. with friends, colleagues)			27	36	→ 17-24; Female; ABC1; city
Motorcycle/scooter			8	8	→ 17-44; Male; London; city
Car club (i.e. Street Car)			N/A	5	→ 17-24; London; city

*in 2009 statement was 'Car sharing' with no clarification

Issues that might be of concern to motorists.

Drink driving is the issue that causes the most concern for motorists.

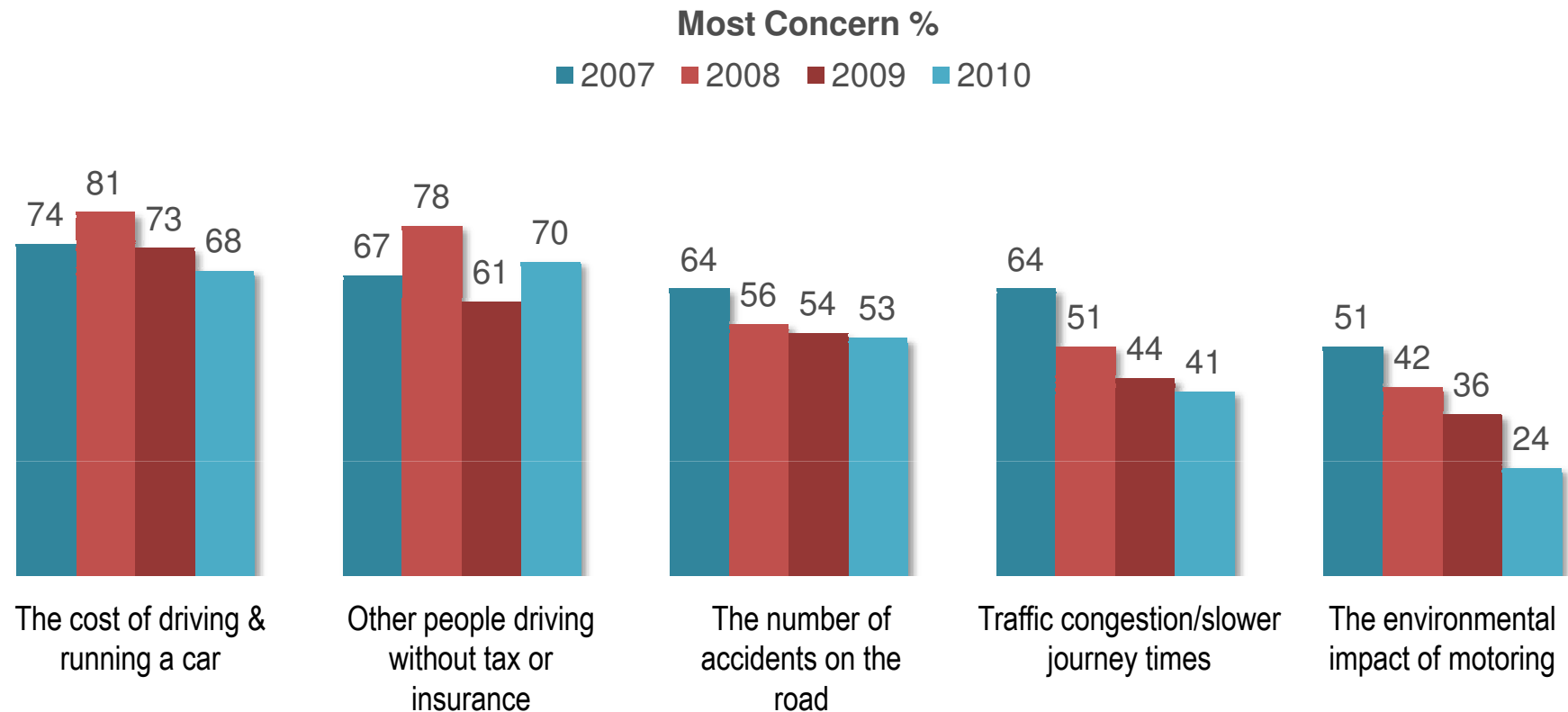
Younger drivers and elderly drivers do not warrant as much concern as other issues.

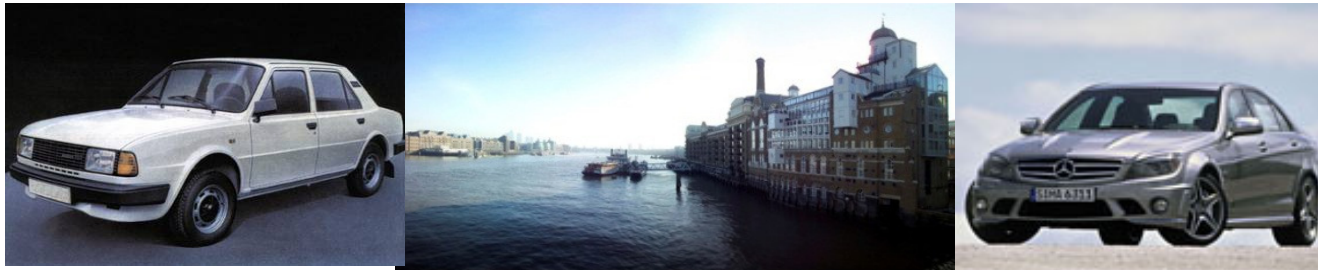


Issues that might be of concern to motorists.

There are variations in the level of most concern from 2007 to 2010. Overall, there were higher levels of concern in 2008 than any other year. 2010, has the lowest levels, with the exception of 'Others driving without tax or insurance'. The 'environmental impact of motoring' has seen a steady decline since 2007.

'Other people driving without tax or insurance' has increased to overtake 'cost of motoring' in terms of importance.

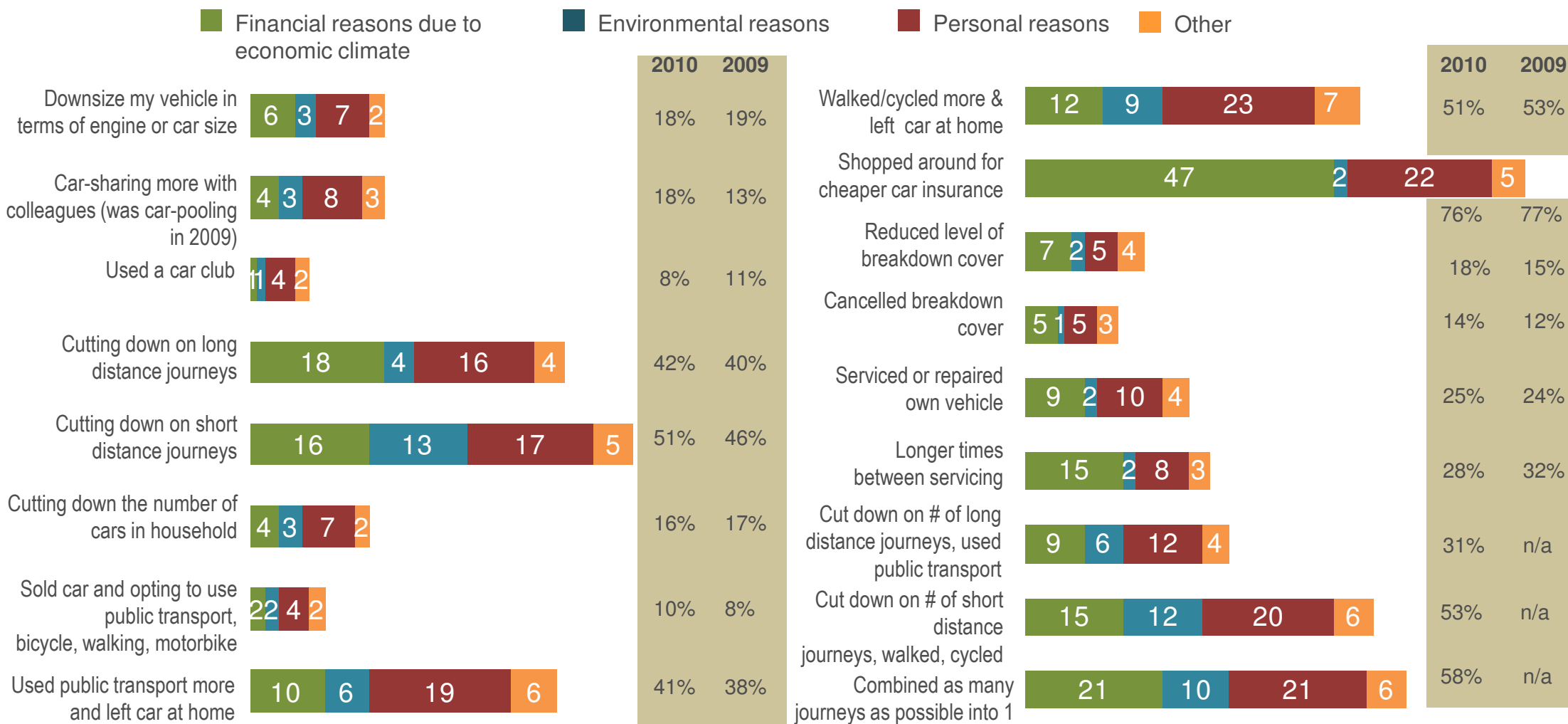




gauging the mood in 2010 – tracker questions

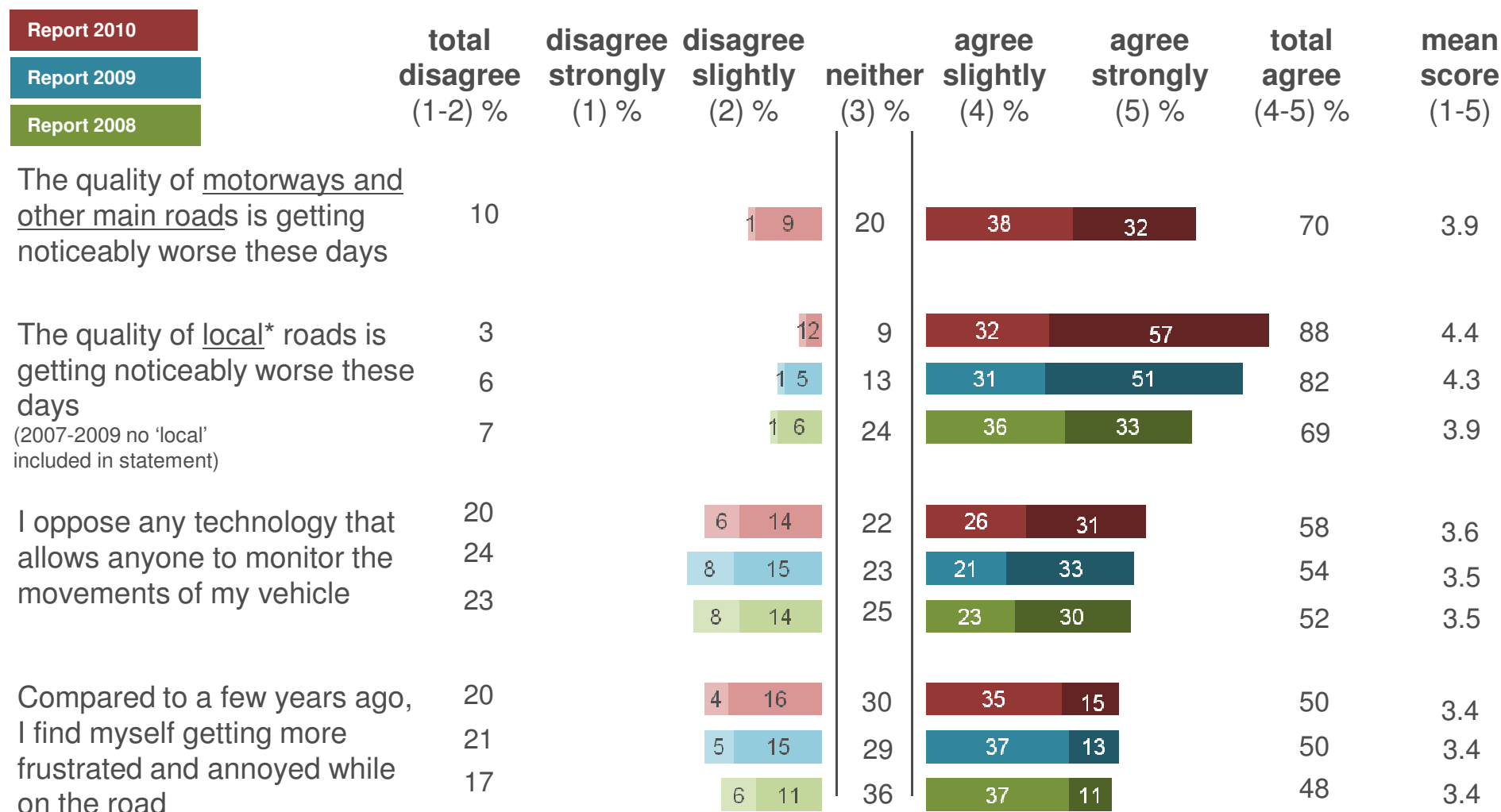
Actions taken.

The actions taken in the last 18 months mirror those seen in 2009. The majority are taken for financial reasons or personal reasons – not the environment.



Views on motoring – general.

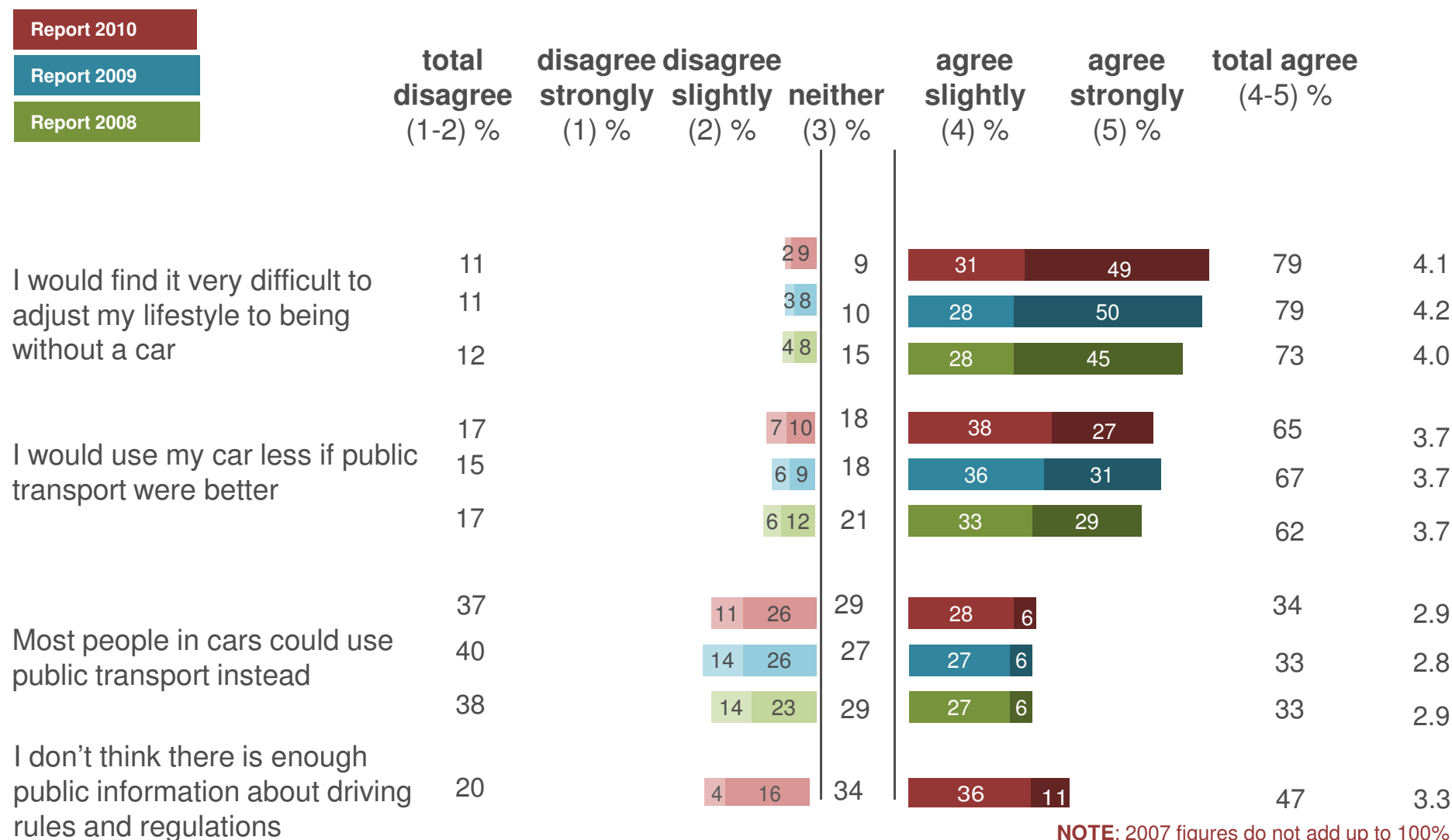
More respondents believe that local roads are getting worse compared to motorways and other main roads. Due to the wording change between 2009 and 2010 the increase cannot be deemed significant or directly comparable.



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

Views on motoring – me & my car.

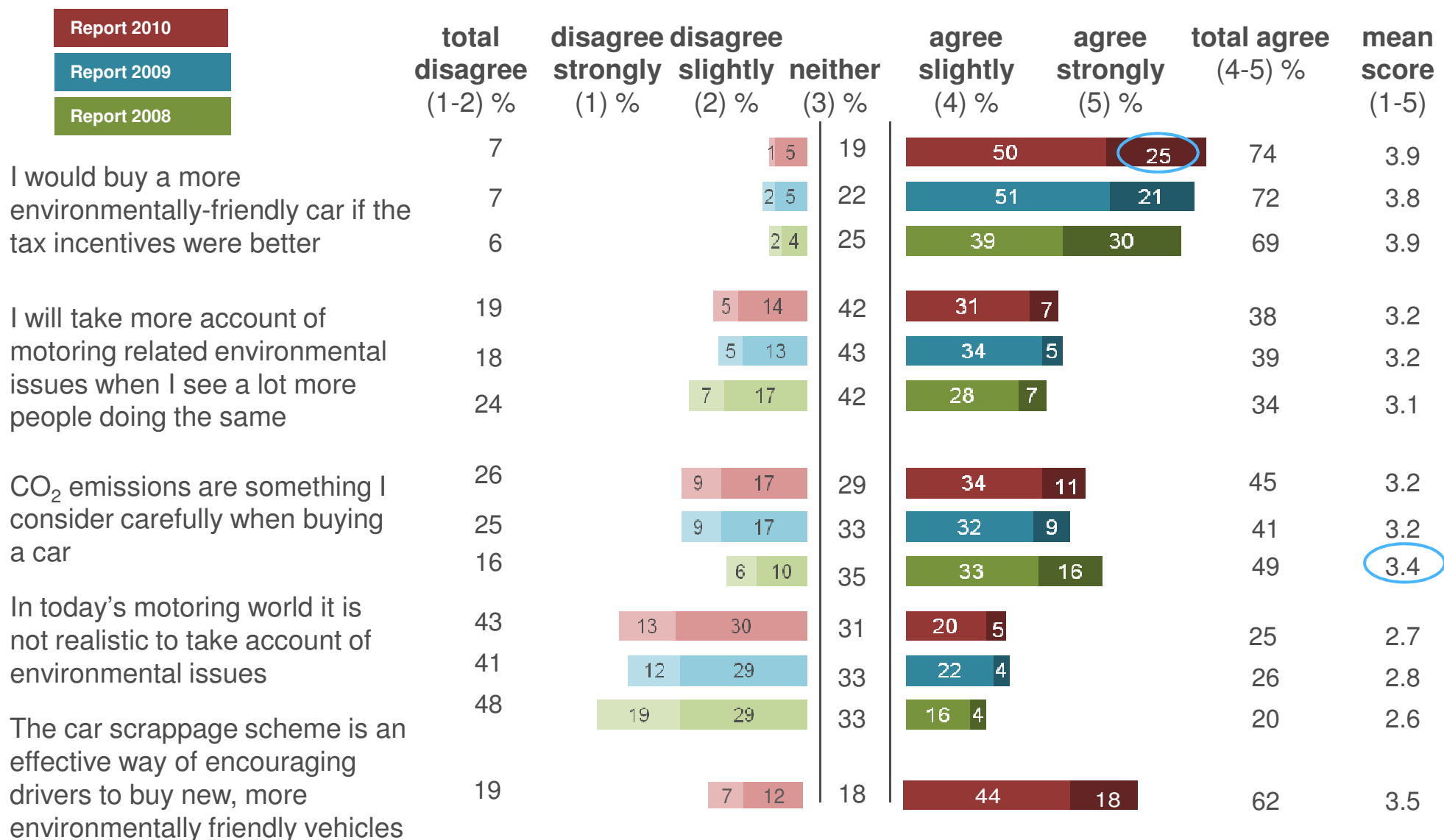
Agreement with statements about motorists and their reliance on cars has not changed from 2009 to 2010.



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

Views on motoring – environmental.

There has been increased agreement since 2008 that respondents would buy a more environmentally friendly car if tax incentives were better. However, less than two-thirds think car scrappage is an effective scheme.



Views on motoring – revenue/congestion.

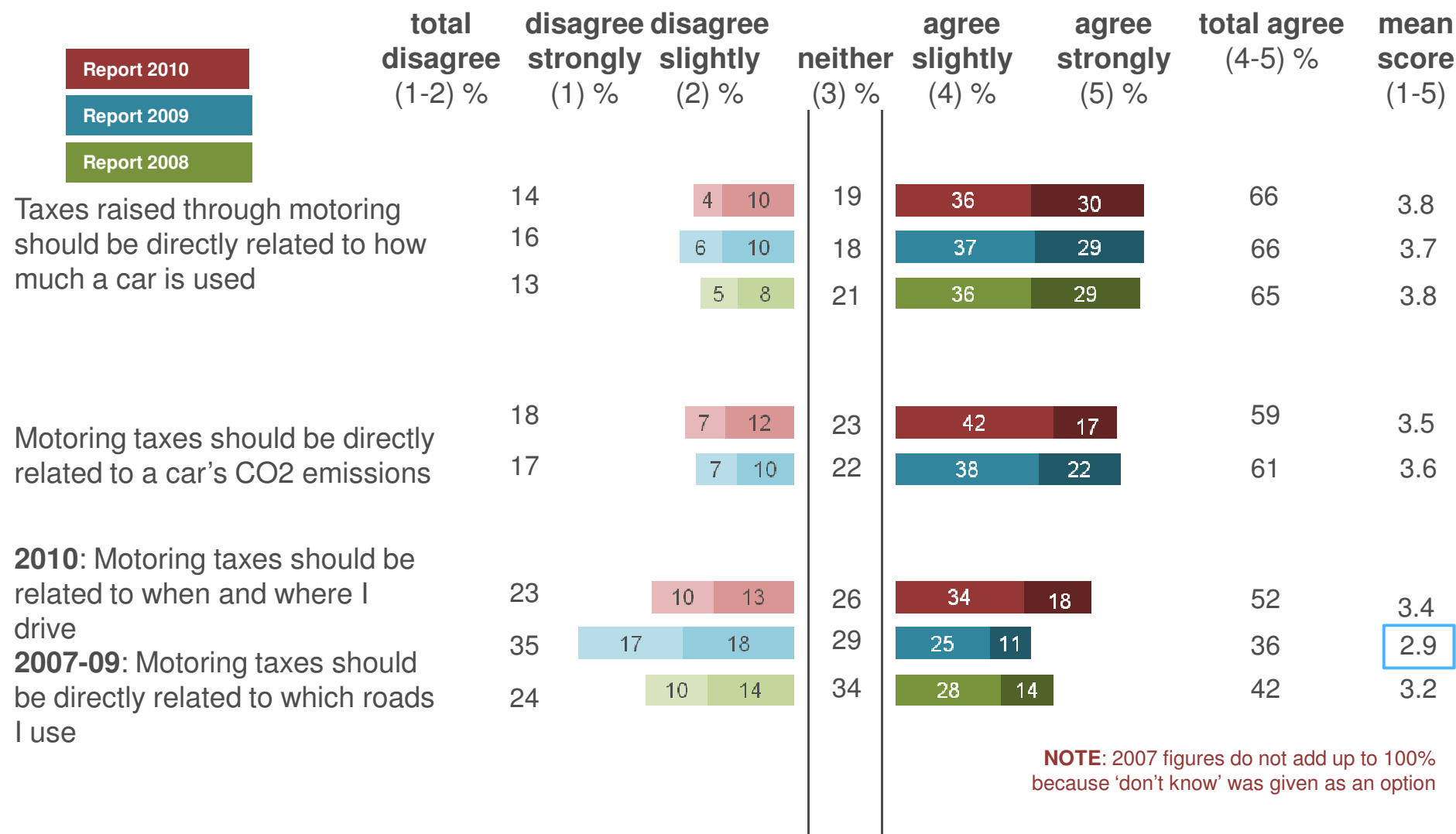
Fewer motorists in 2010 agree that congestion seems to be getting worse each day. And a higher number agree that much tougher steps should be taken to reduce congestion

	Report 2010	total disagree (1-2) %	disagree strongly (1) %	disagree slightly (2) %	neither (3) %	agree slightly (4) %	agree strongly (5) %	total agree (4-5) %	mean score (1-5)
	Report 2009								
	Report 2008								
Speed cameras are more about raising money than improving road safety		13		4 9	10	28	49	77	4.1
		14		4 10	9	29	49	77	4.1
		12		4 8	13	28	47	75	4.1
Most driving offences generate money for the Treasury rather than improve road safety		8		3 6	8	34	49	83	4.2
		8		4 4	11	33	48	81	4.2
		8		3 5	13	31	49	80	4.2
Much tougher steps should be taken to reduce traffic congestion		8		2 6	25	47	20	67	3.8
		9		2 7	29	41	21	62	3.7
		8		2 5	30	40	22	62	3.7
Congestion seems to be getting worse each day		7		1 6	27	45	21	66	3.8
		7		1 6	21	45	28	73	4.0
		7		1 5	24	44	25	69	3.9

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

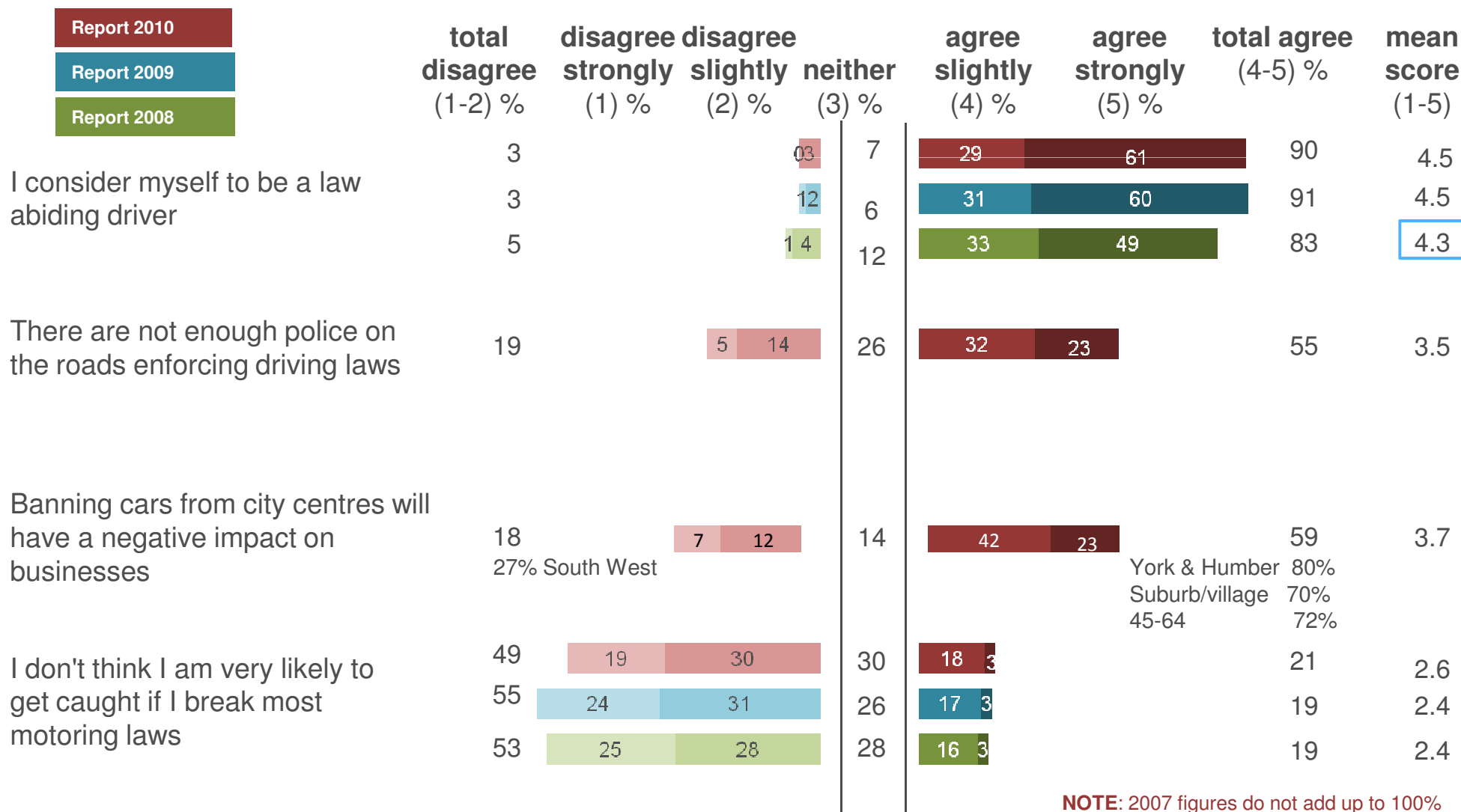
Views on motoring – motoring taxation.

52% of respondents agree that taxes should be related to when and where they drive which garners more agreement than taxes should be related to which roads they use.



Views on motoring – the law.

More than one-half agree there are not enough police officers on the roads and a slightly greater proportion believe banning cars from city centres will harm businesses.



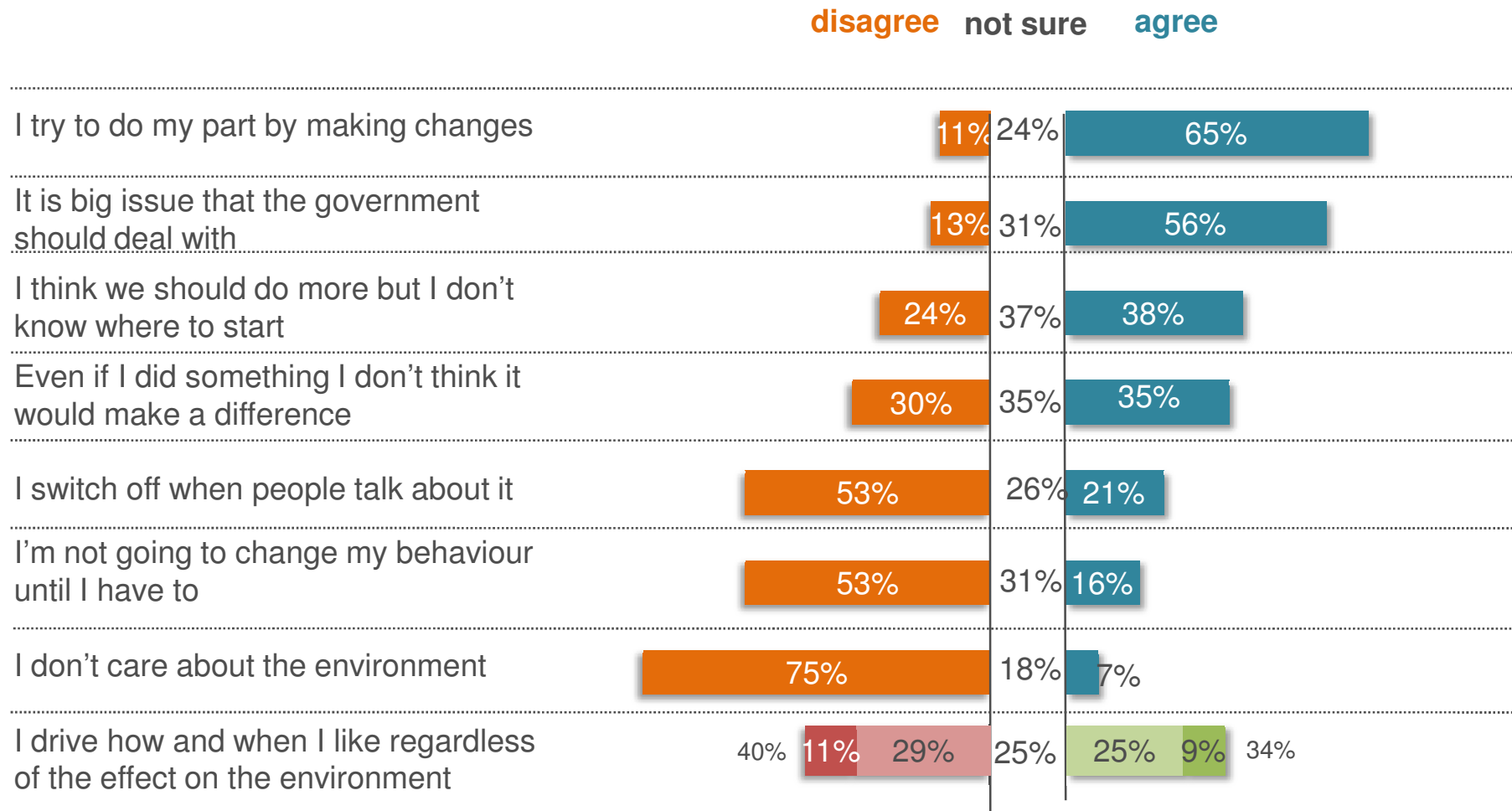
NOTE: 2007 figures do not add up to 100% because 'don't know' was given as an option



the environment

Engagement with 'the environment'.

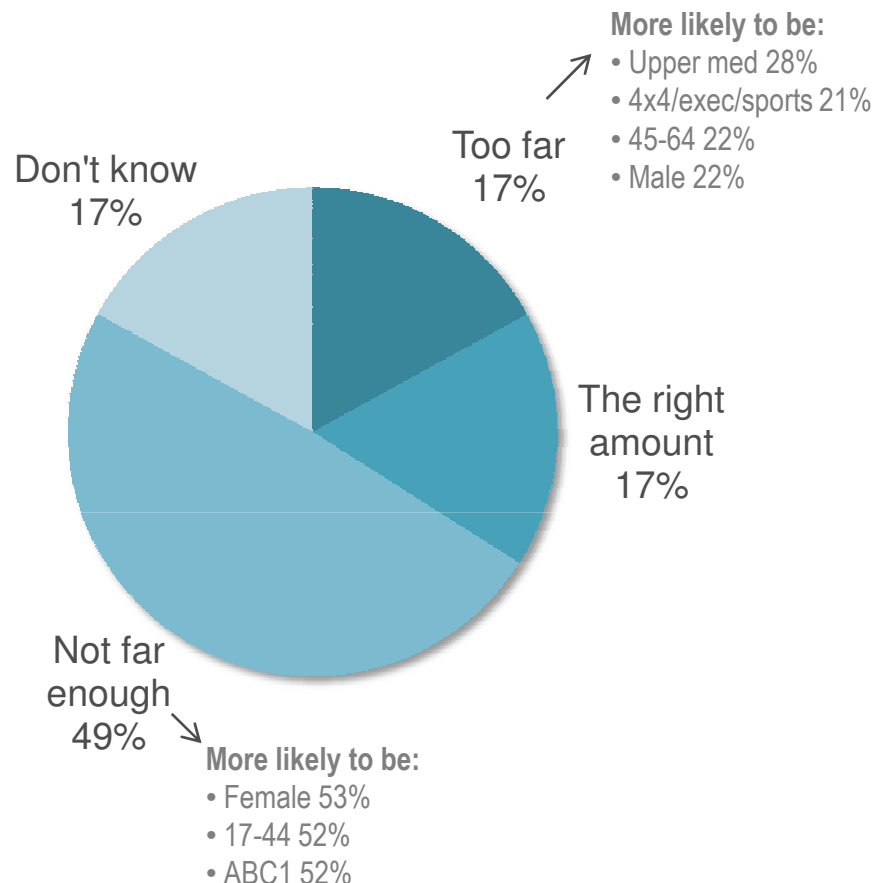
Almost two-thirds try to do their part for the environment and three-quarters (75%) care about the environment. Over one-half (56%) feel the government should be tackling the issue. Although motorists don't switch off (53%) and say they will change their behaviour before 'they have to' one-third (34%) drive 'when and how they like'.



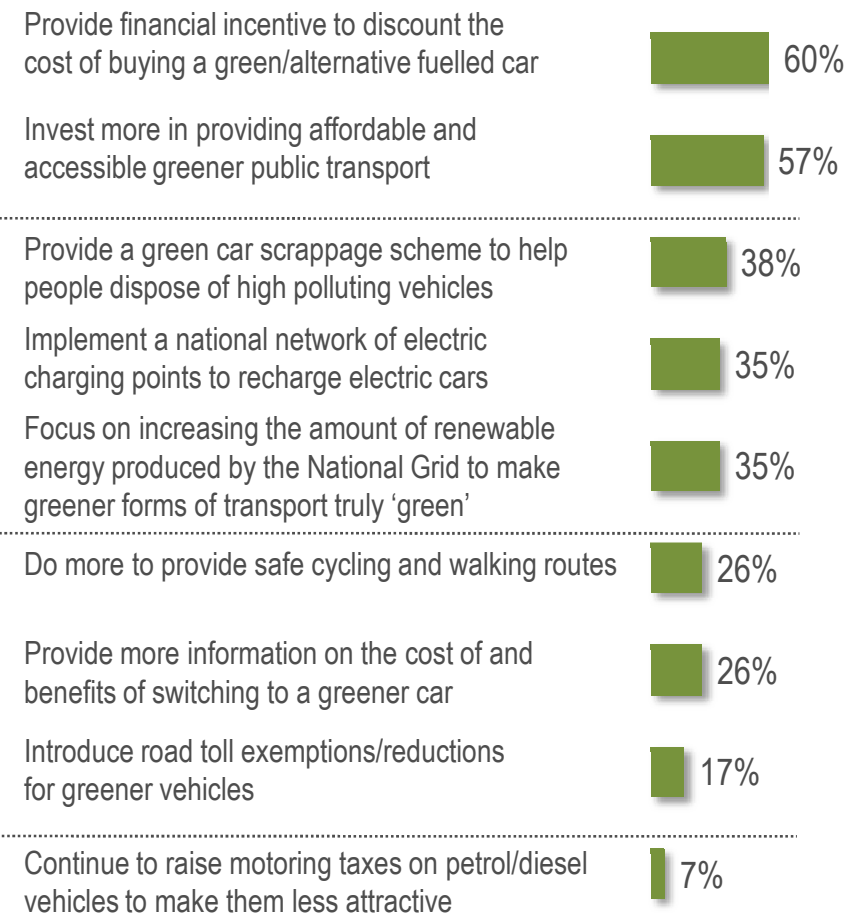
Current Government and the environment .

Almost one-half think the current government has not gone far enough in terms of reducing the environmental impact of motoring. Providing financial incentives to motorists for green cars and investing in public transport are seen to be areas where Government can make the biggest difference.

Q42. In regards to reducing the environmental impact of motoring in the UK, do you think the current government has gone...? Base: all respondents (n=1,150)

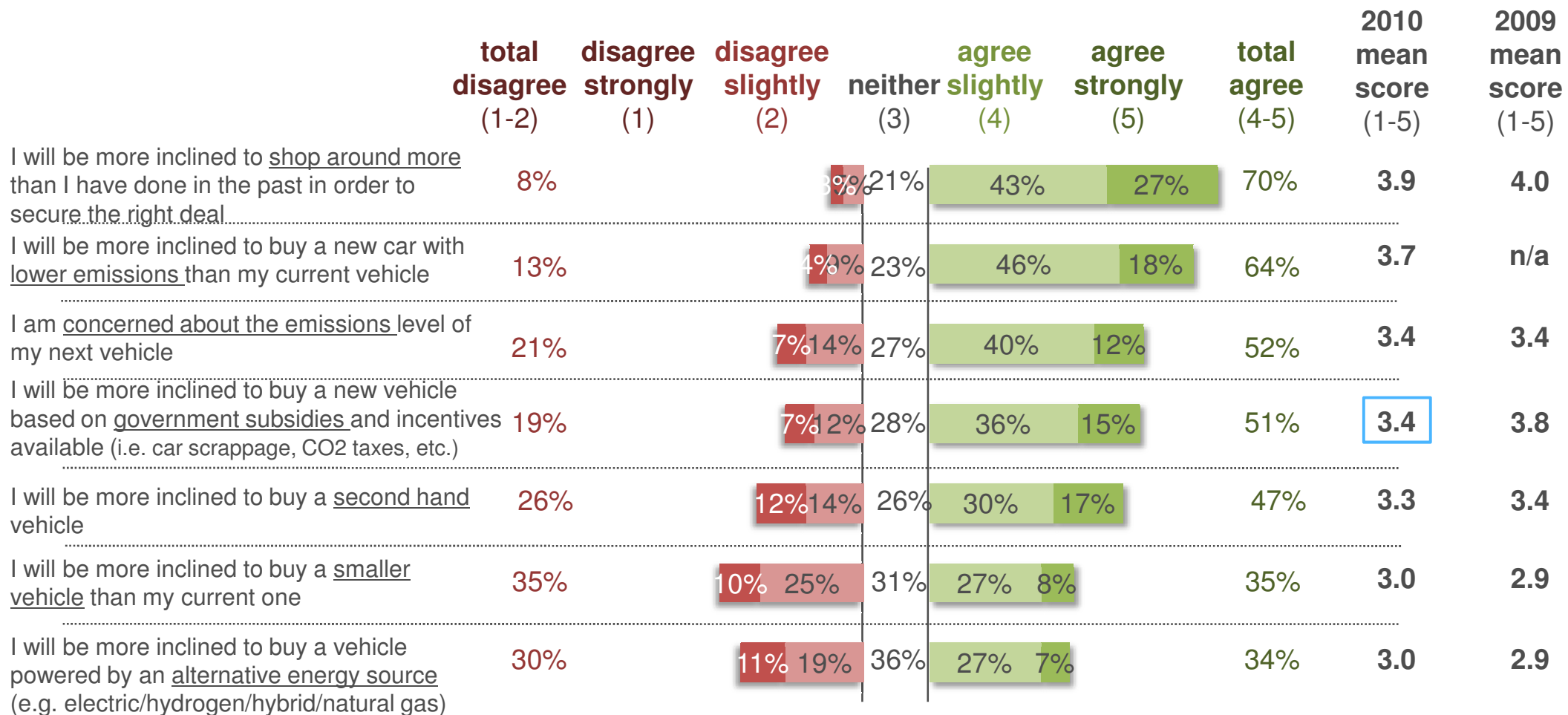


Q43. Which three things do you think Government could do to make the biggest difference to greener transport (whether or not you agree with it)? Base: all respondents (n=1,150)



Environmental considerations for new car.

While most say they are more inclined to buy a vehicle with lower emissions fewer are actually concerned about emissions. Fewer motorists in 2010 say that government subsidies will influence what they buy compared to 2009 but this could be due to the termination of the car scrappage scheme.

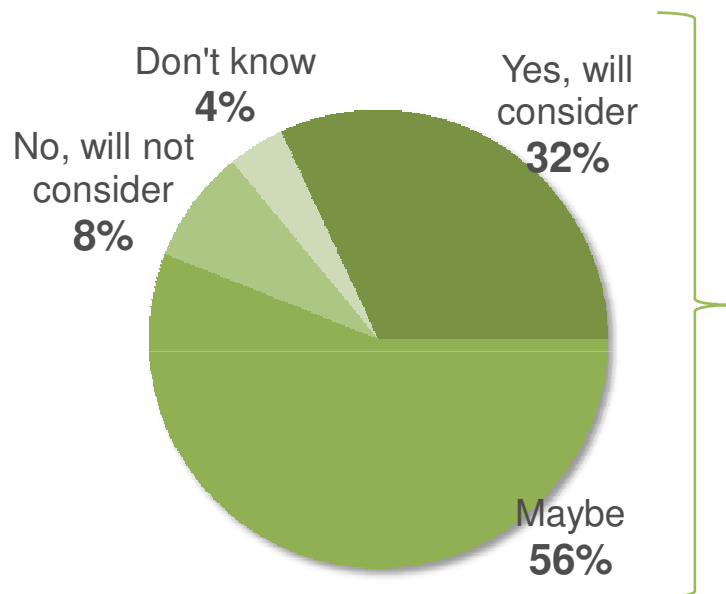


Consideration of more environmentally friendly vehicles.

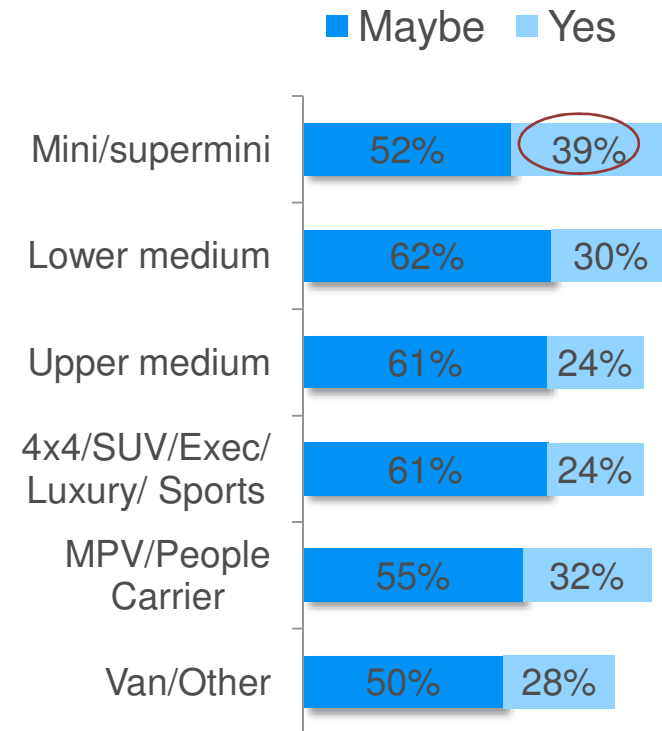
One-third say they will consider a more environmentally friendly vehicle with another half saying they might consider. Those with smaller vehicles are ore likely to consider a more environmentally vehicle.

Q33. Thinking about the next time you buy a car, how likely or unlikely are you to consider buying a more environmentally friendly car?

Base: all respondents (n=1,150)

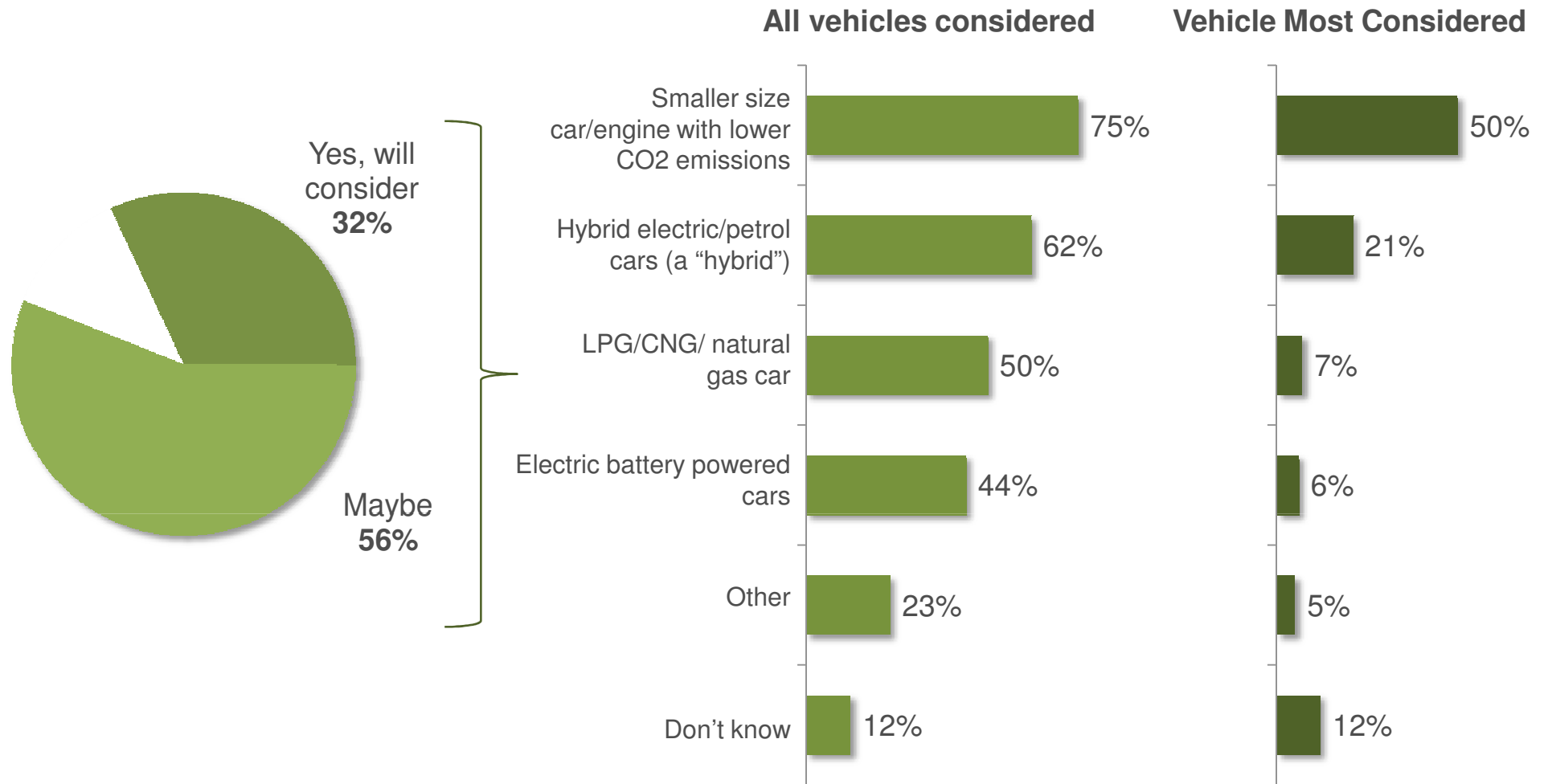


Profile of those who said 'Yes' and 'Maybe'



Environmentally friendly vehicle consideration.

The most familiar environmentally friendly vehicles – smaller sizes and hybrids – are also the most likely to be considered by motorists.





electric vehicles

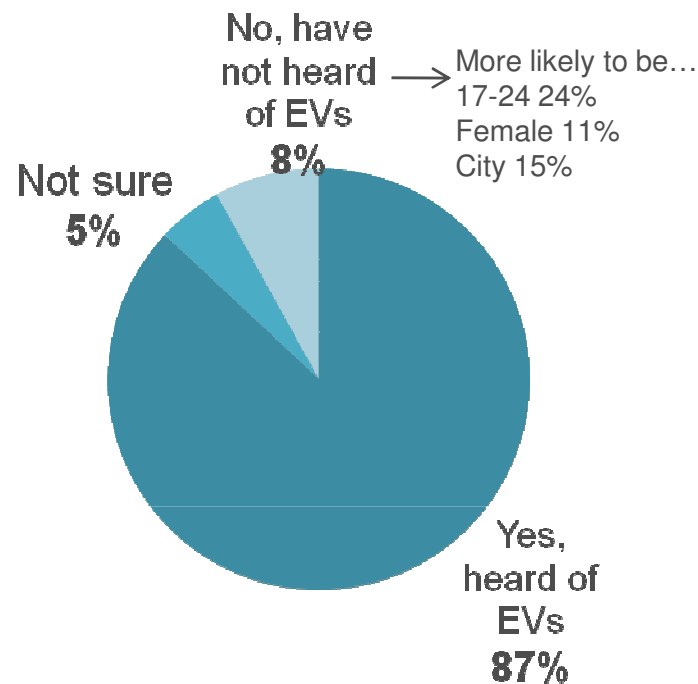
Awareness and incentive to purchase EVs.

Almost nine out of ten motorists have heard of EVs .

Increasing the distance travelled, introducing more charging points and reducing the cost of the vehicles appear to be factors that are hindering consideration of EVs.

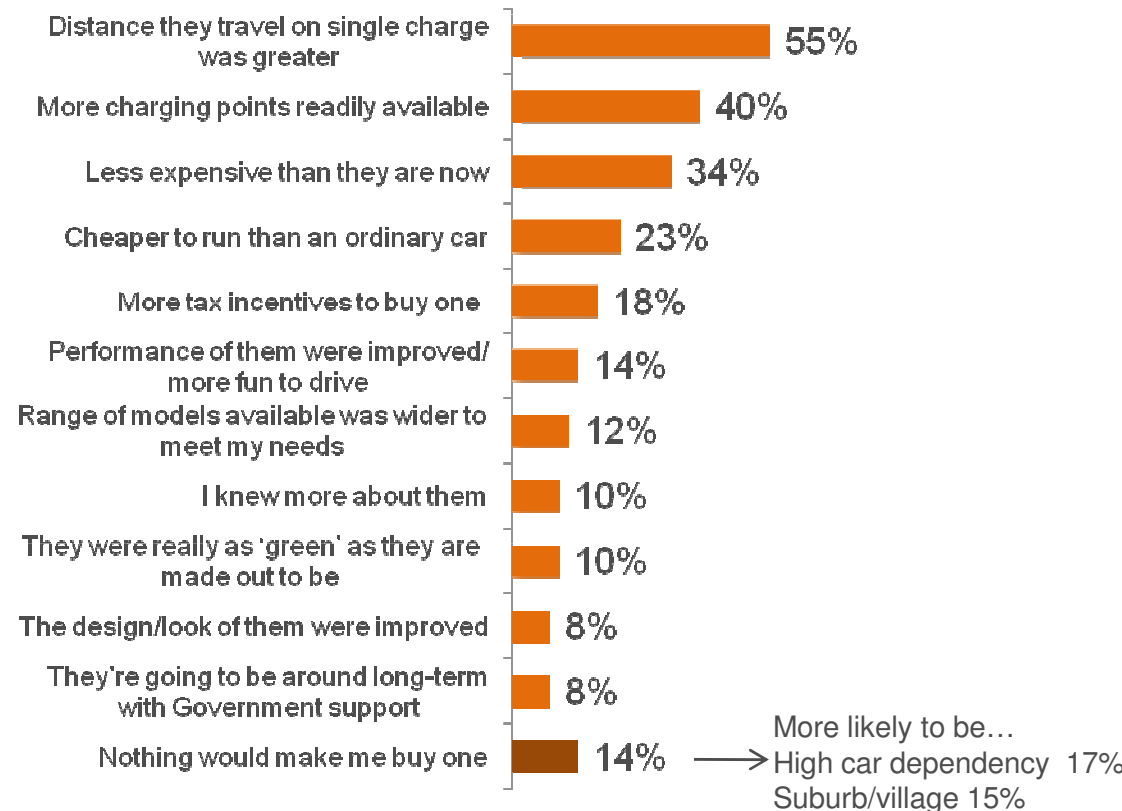
Q35. Have you heard of Electric Vehicles before today?

Base: all respondents (n=1,150)



Q36. I would be more likely to buy an electric car if...

Base: those aware of EVs (n=1,000)

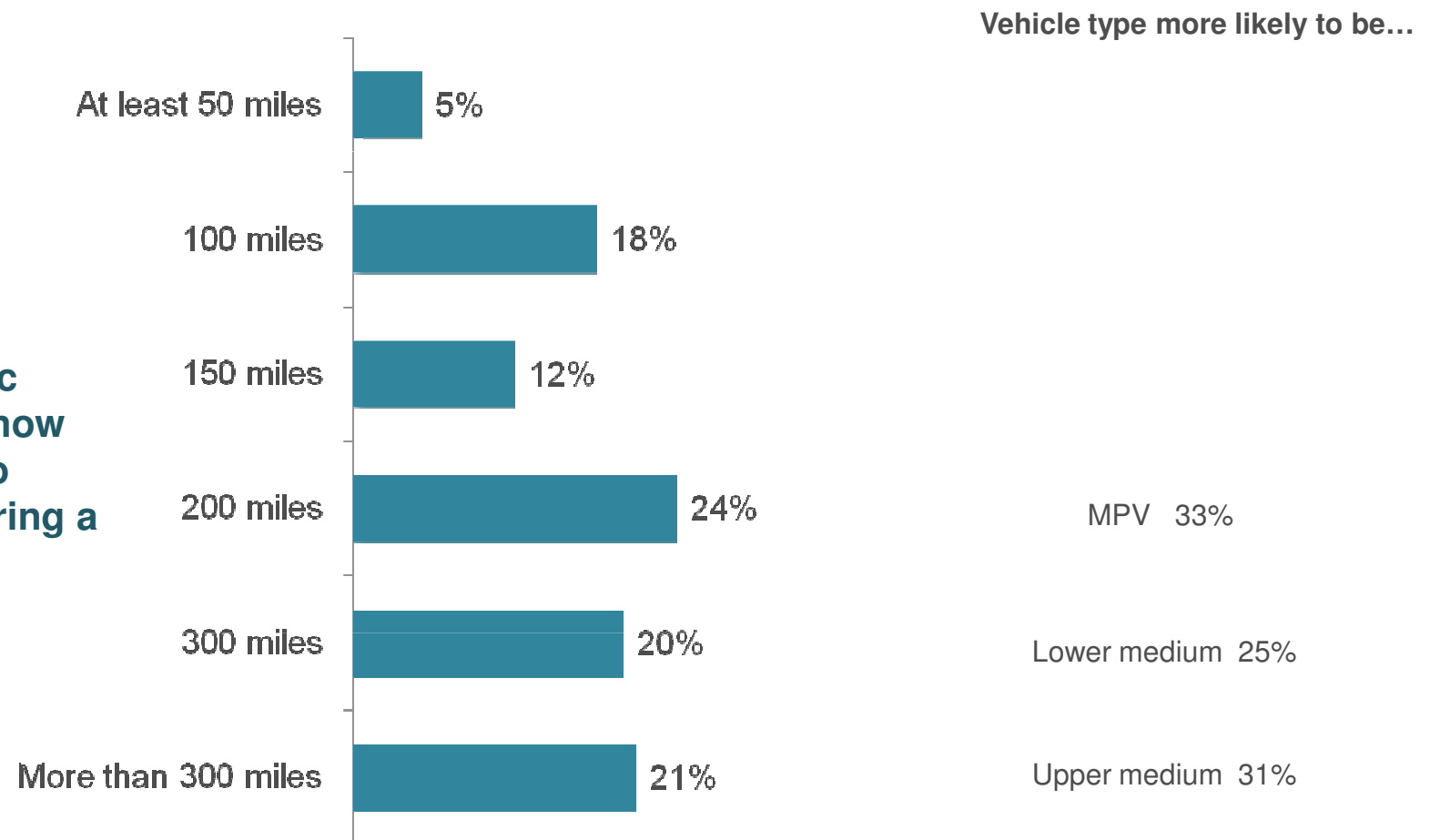


Q36 What would make you more likely to consider buying an electric car? Please complete the statement with three options from below. I would be more likely to buy an electric car if...

EV range required before purchasing.

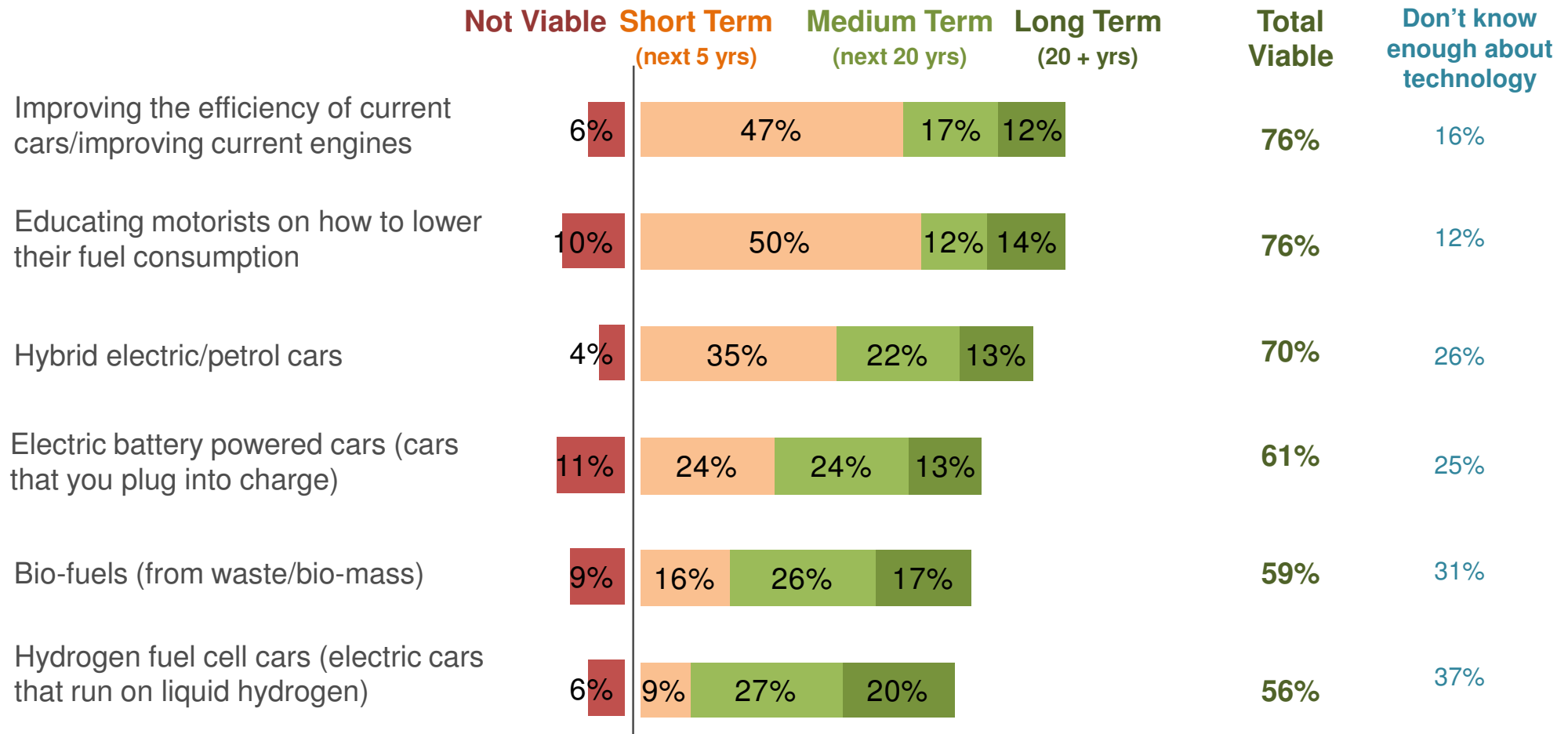
Motorist opinion of how far an EV needs to travel is wide spread although nearly two-thirds (65%) say it needs to be at least 200 miles.

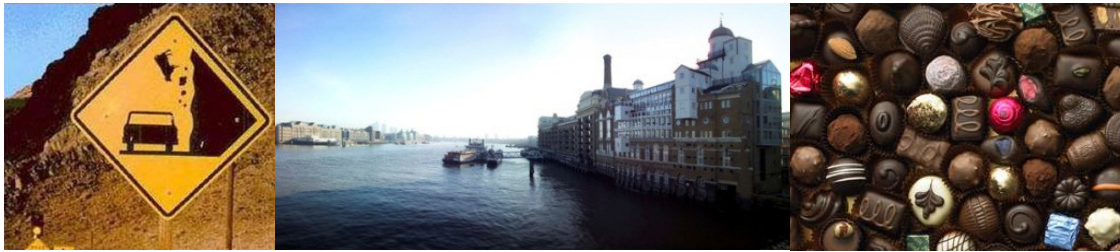
In order for you to consider an electric powered vehicle, how far would it need to travel before requiring a recharge?



Viable environmentally friendly vehicles

Hydrogen fuel cell cars and those powered by bio-fuels are seen to have the greatest potential over the medium and long term – vehicle types furthest from being available on the road today. In contrast improving efficiency and educating motorists are seen as short term solutions.





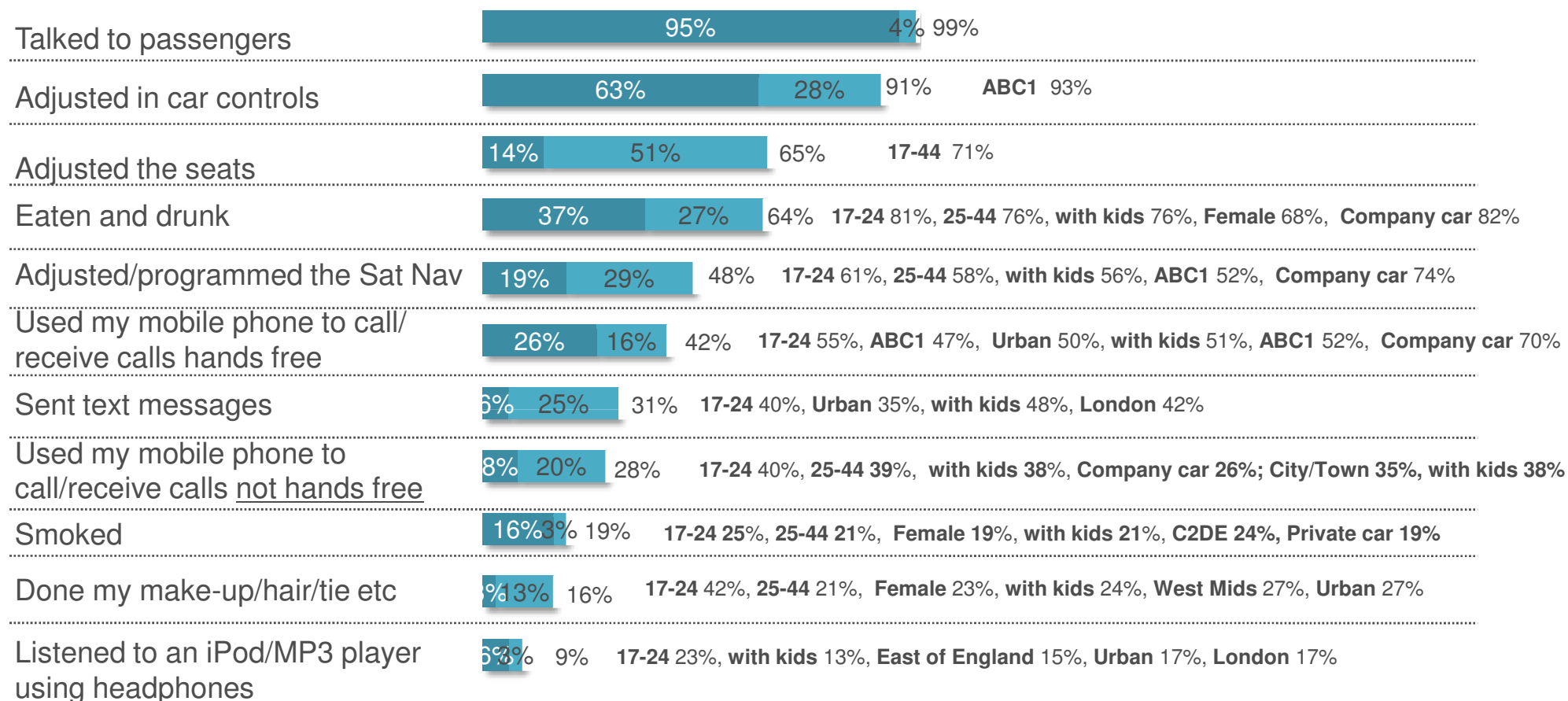
safety on the road

Dangerous roads.

Many respondents have done activities that might distract them whilst driving.

Q13. Which of the following activities have you done in the past 6 months whilst driving?

■ Yes, whilst driving ■ Only when stationary



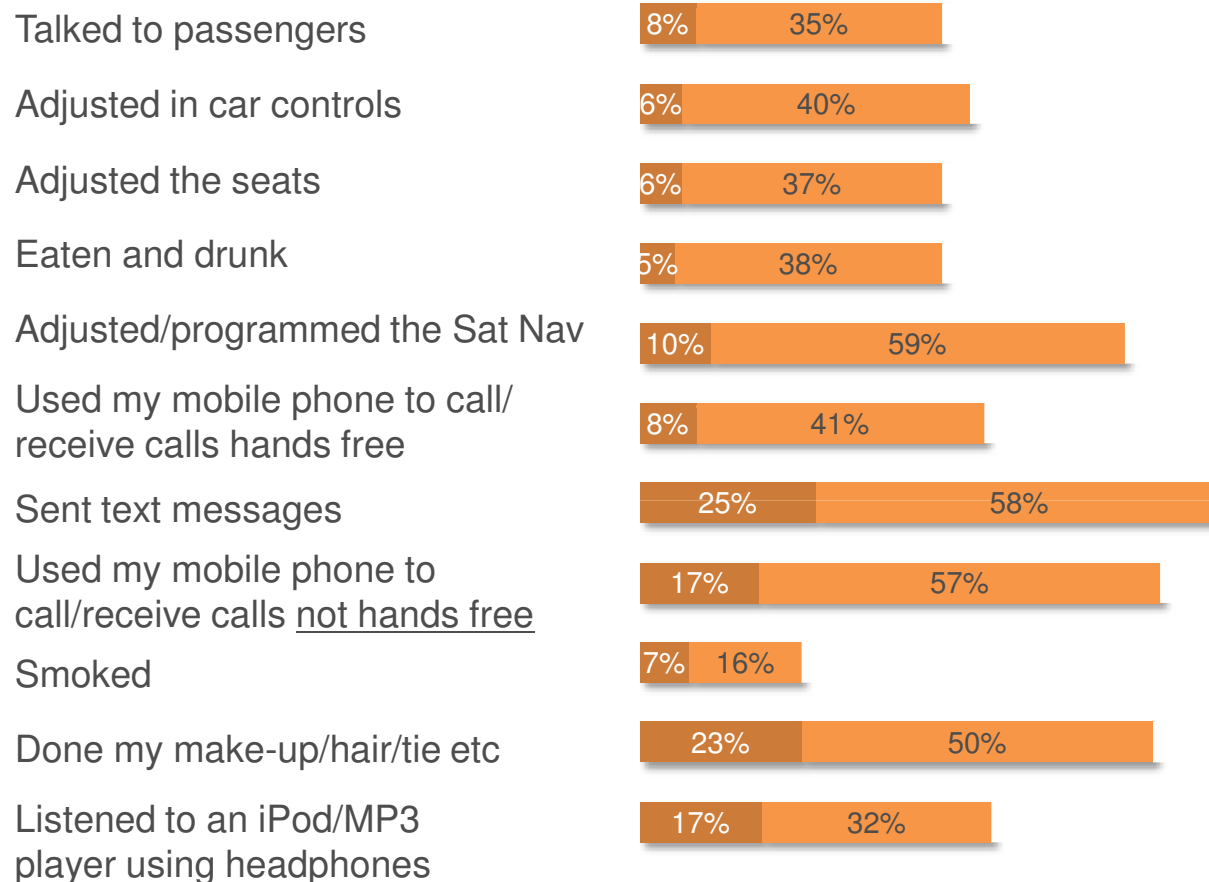
Dangerous roads.

Although many respondents have done activities that might distract them whilst driving, often, they do not think this activities actually distract them.

Q.14 How often do these activities cause you to become distracted whilst driving?

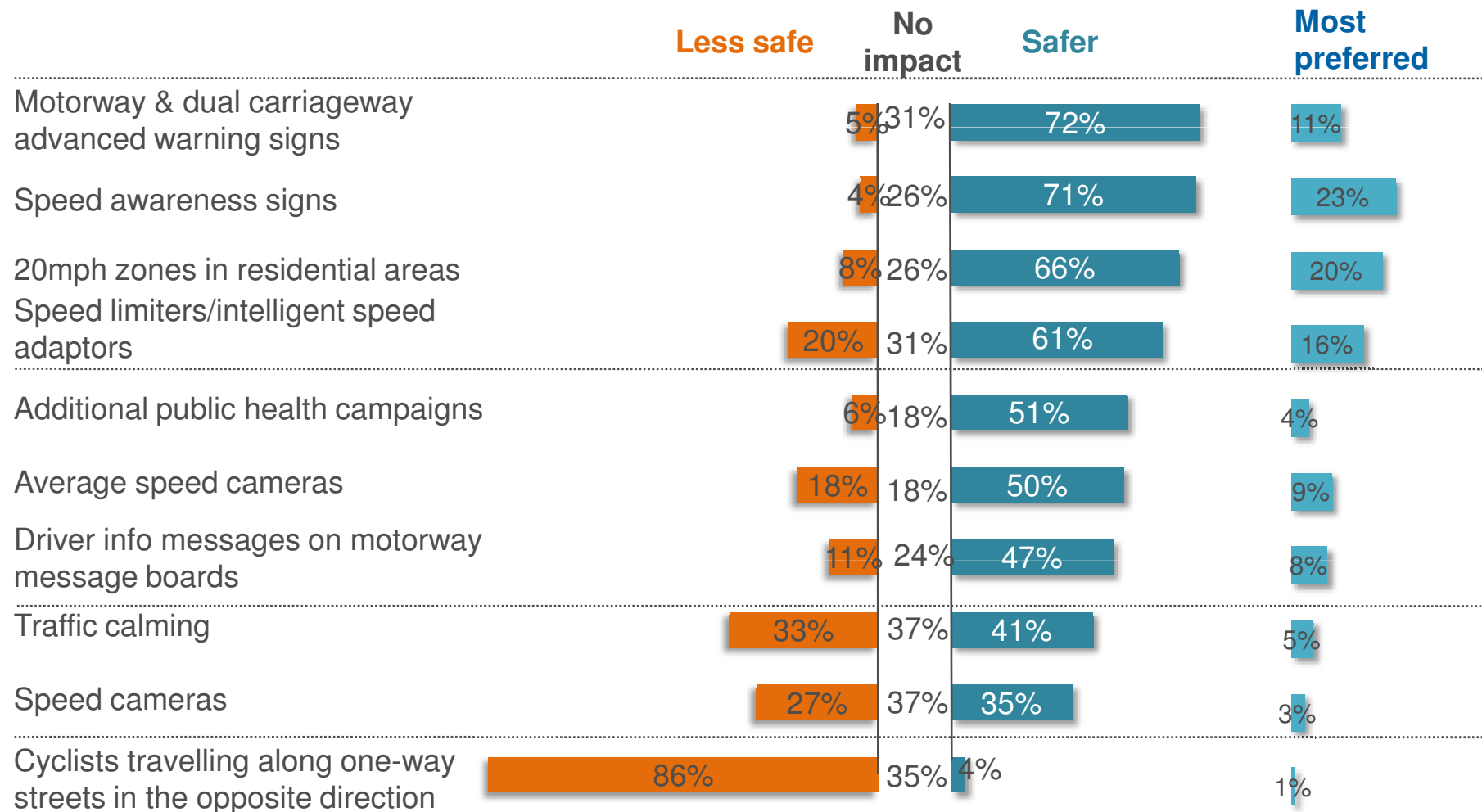
Amongst those doing whilst driving

■ Frequently ■ Occasionally



Traffic features and their impact on safety.

Despite motorway warning signs being the top feature for creating safer roads overall, speed awareness signs are the most preferred followed by 20mph zones.



Q15 Do you think the introduction or further implementation of the following features have made motoring in general: more safe, less safe or had no impact?

Q16 Which one of the following options would you most like to see more of or be introduced on the roads that you regularly drive on to make them safer?

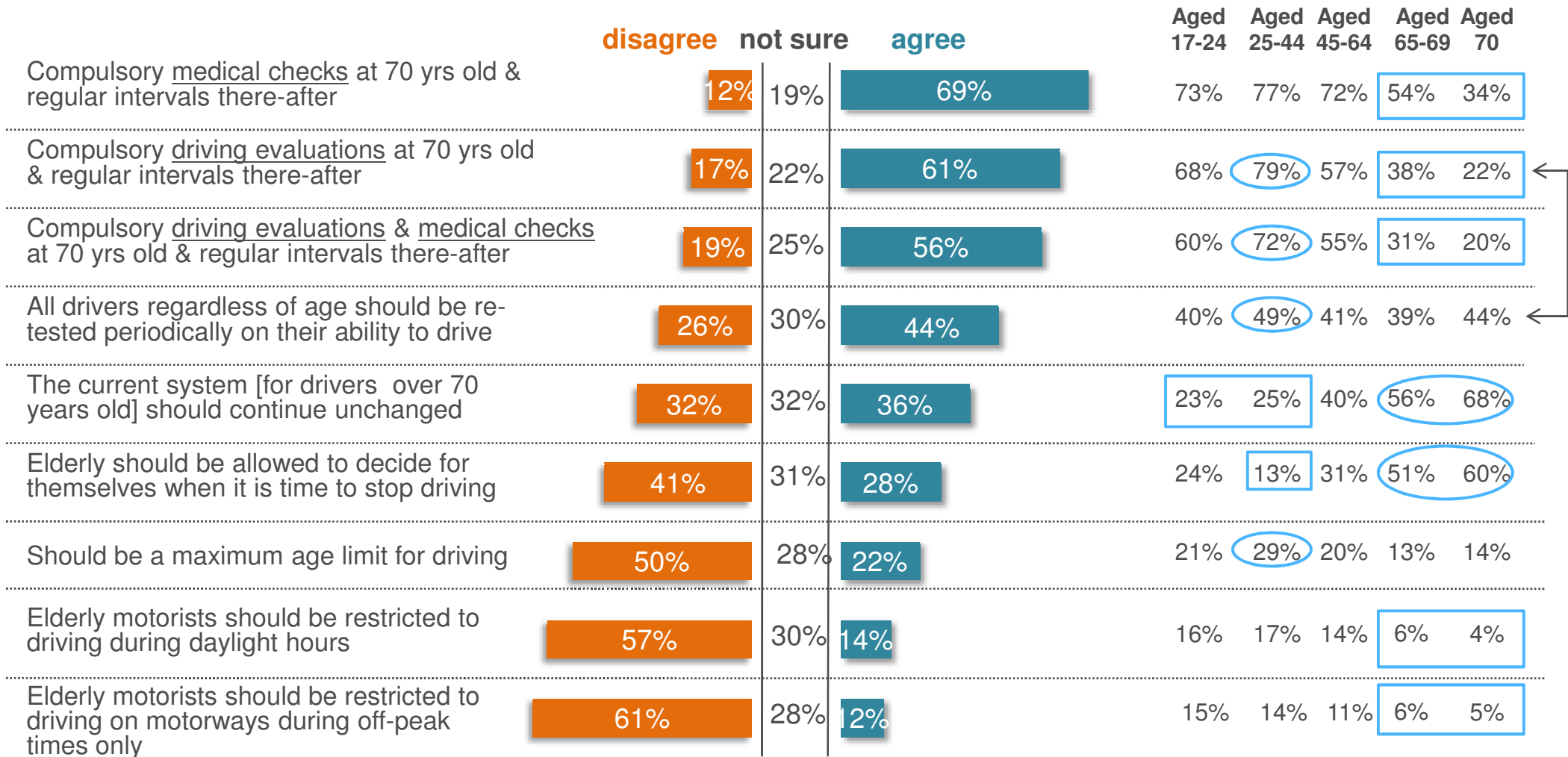
Base: all respondents (n=1,150)

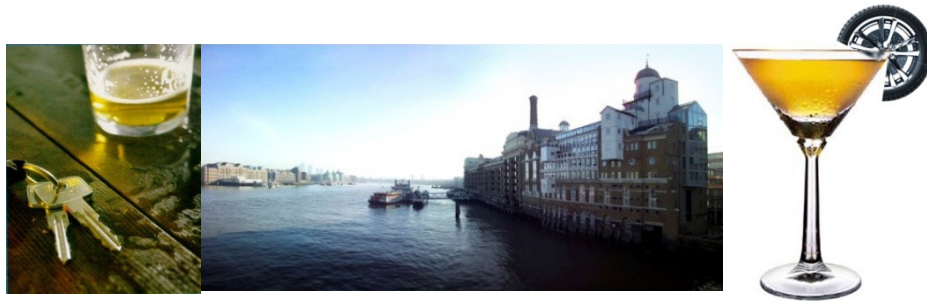


older drivers

Elderly Drivers

The large majority of respondents agree that elderly drivers should have both medical and driving tests at 70. Those over the age of 65, particularly those over 70 years old are more likely to disagree with restrictions on their driving.





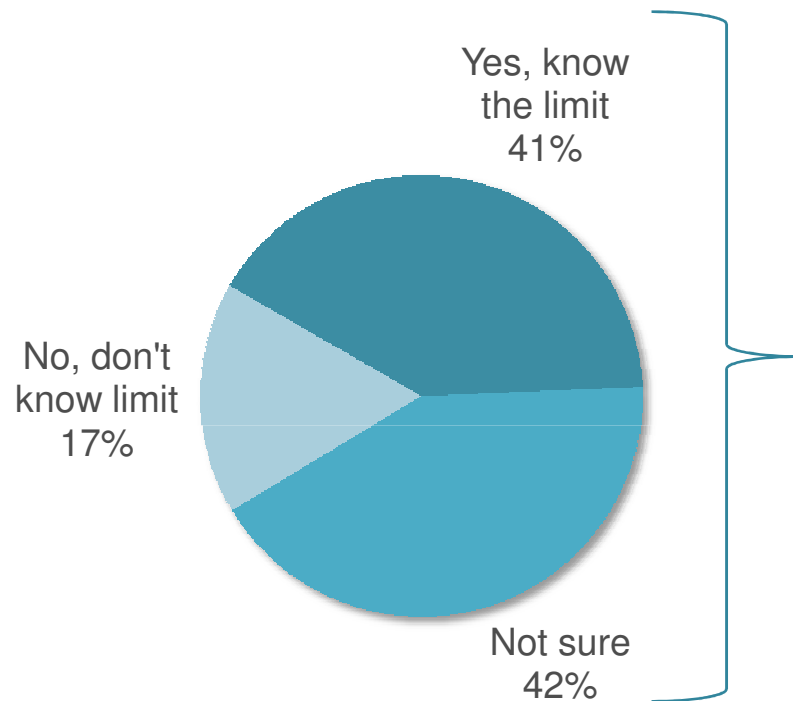
driving under the influence

Estimation of UK Drink Driving Limit.

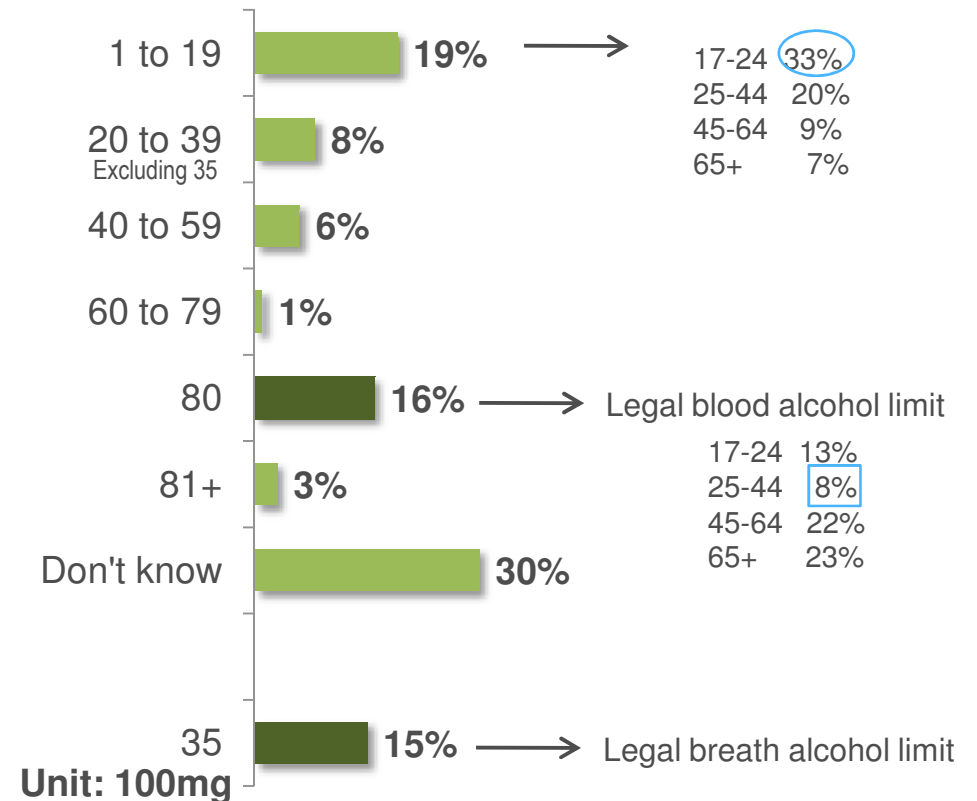
Whilst 41% say they know the drink driving limit only 31% of those that think they know are able to correctly recall the limit spontaneously.

Q18 Do you know what the current drink driving limit is in the UK?

Base: all respondents (n=1,150)

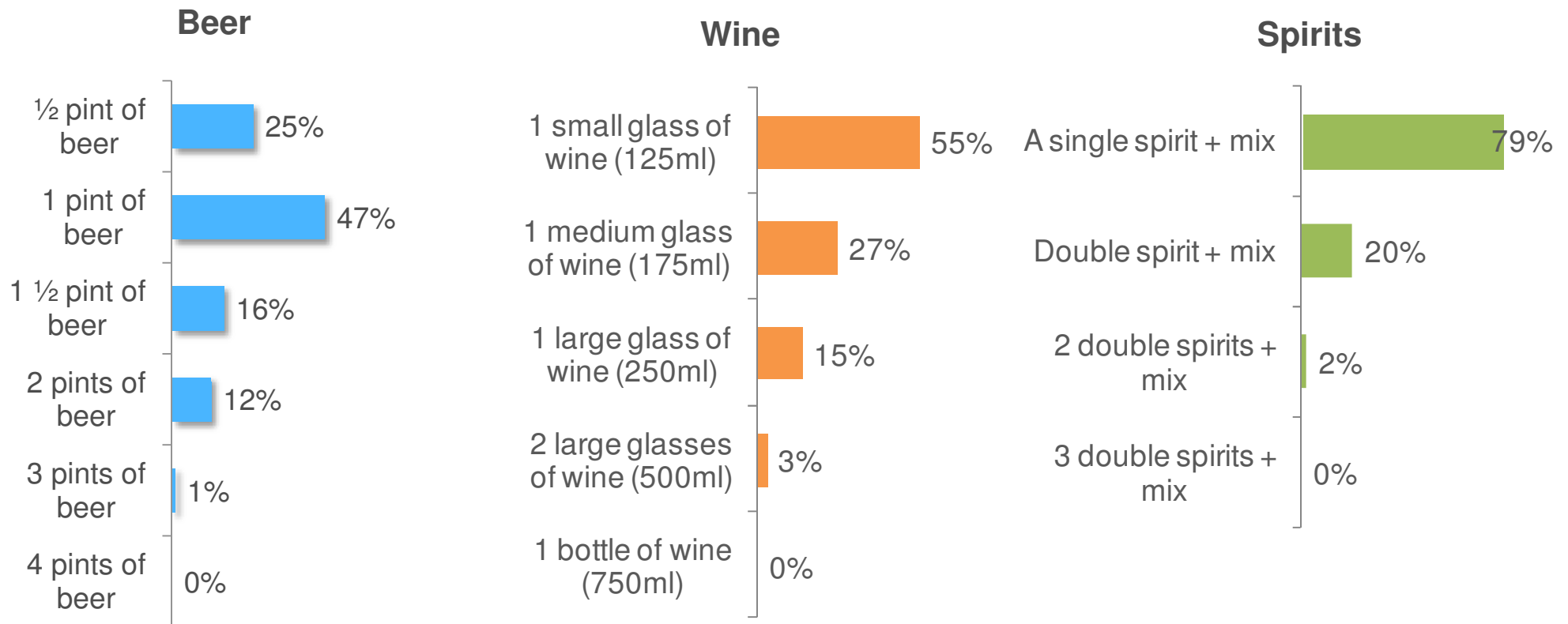


Q19 Please tell us what you think the drink-drive limit is in the UK? Please use mg of alcohol per 100 ml of blood (the standard measure). Base: those who can respondents (n=963)



Legal Number of Drinks Whilst Under the Limit.

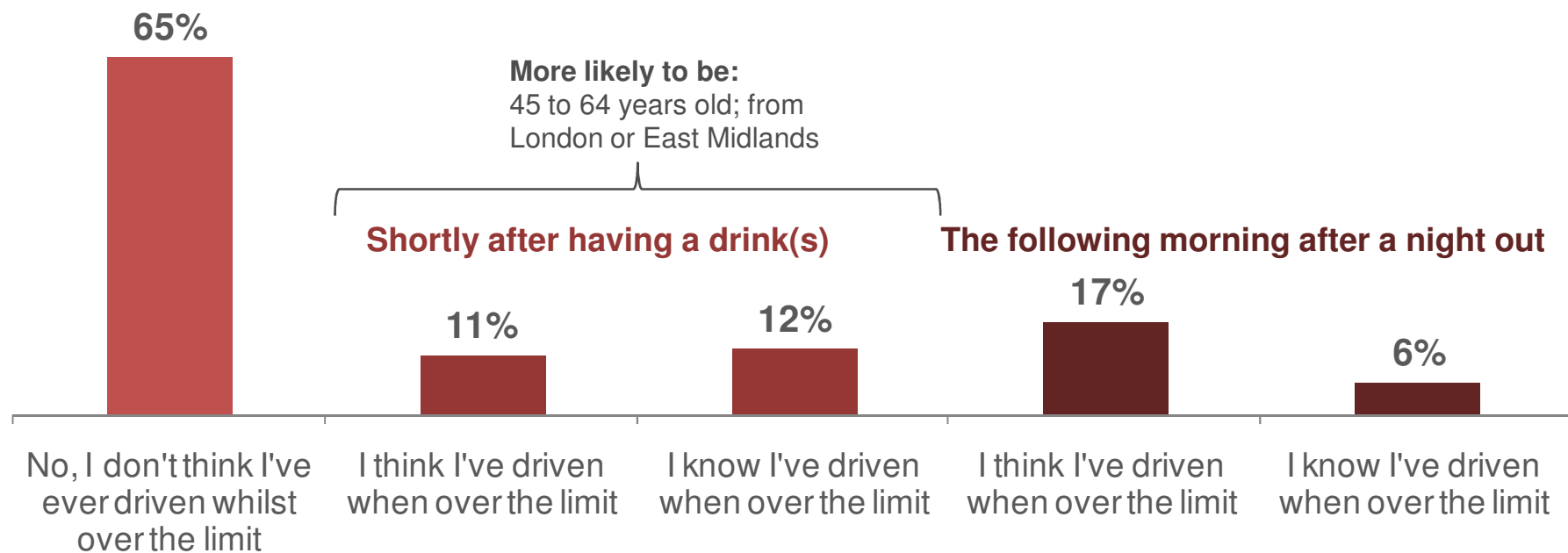
On the whole, the majority of all motorists can accurately cite the number of drinks whilst remaining under the legal limit. This is despite no official communication from government equating units and drink driving limits.



Incidence of Drink Driving.

Almost two-thirds say they have never driven whilst over the limit but almost one-in-five feel they might have still been over the limit whilst out driving the next morning after drinking.

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



RoM 2009
Q1

71%

9%

10%

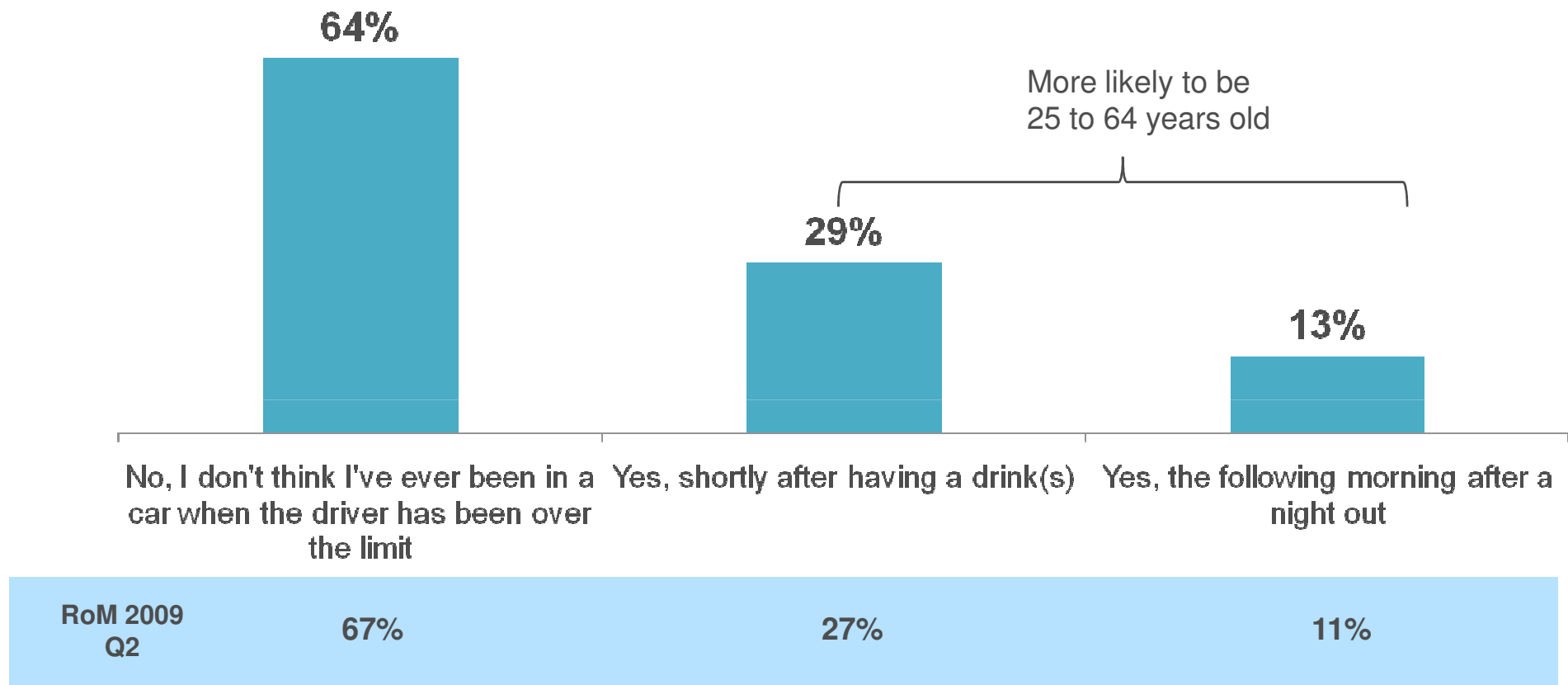
12%

4%

Drink-Drive Passenger.

The same percentage that claim to not have driven themselves while intoxicated also claim never to have driven with someone else who is over the limit.

Have you ever been in the car when the driver is over the drink-drive limit?

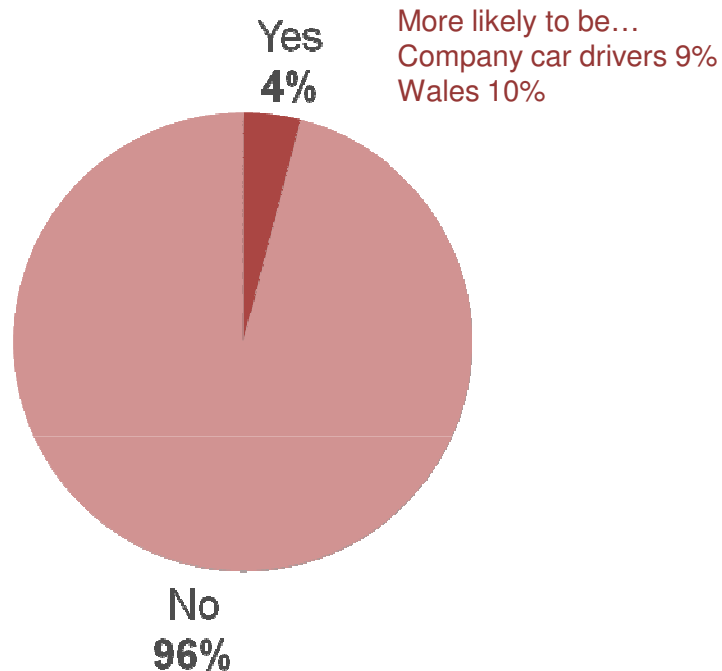


Driving Under the Influence of Drugs.

Less than 10% of the motoring sample has driven under the influence, or with someone they believed to be under the influence of drugs. These percentages are smaller than those from the Aviva 2009 Survey.

Q26 Have you ever driven under the influence of those drugs?

Base: all respondents (n=1,150)

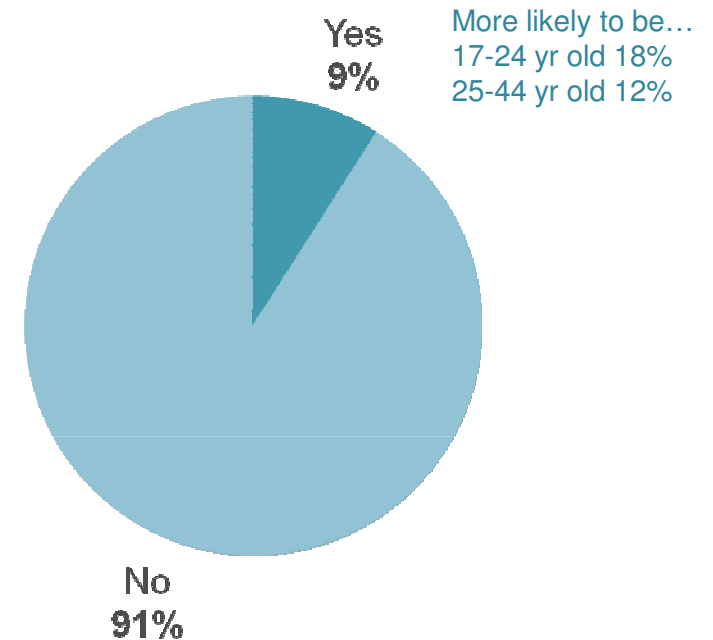


More likely to be...
Company car drivers 9%
Wales 10%

Aviva Drug Driving Survey May 2009 Q5
Yes - 7% No - 93%

Q25 Have you ever been in the car with a driver who you believed to have been under the influence of drugs?

Base: all respondents (n=1,150)

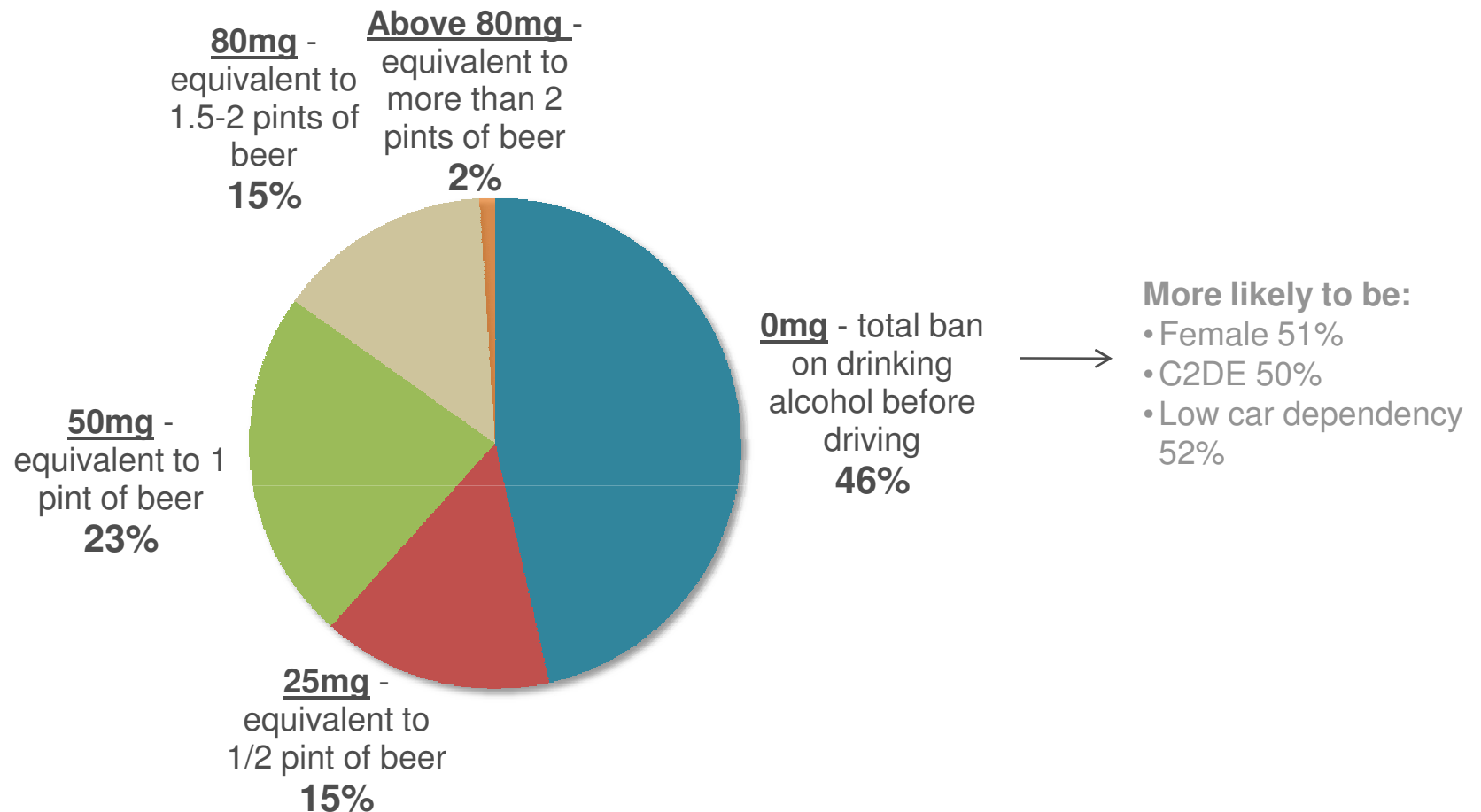


More likely to be...
17-24 yr old 18%
25-44 yr old 12%

Aviva Drug Driving Survey May 2009 Q4
Yes - 12% No - 88%

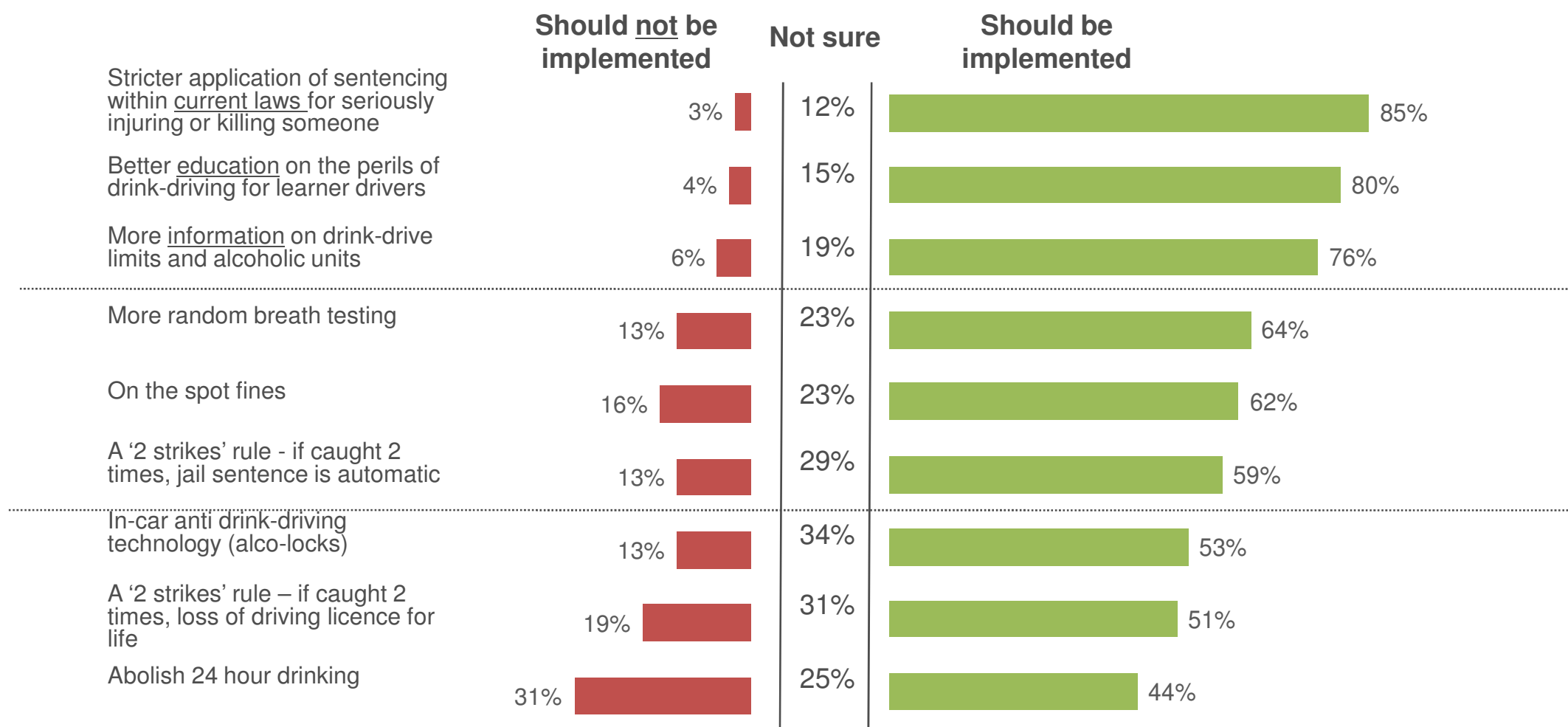
What the Drink Driving Limit Should Be.

Almost one-half of motorists think there should be zero tolerance on drinking before driving. Whilst only 15% site the current limit as their preferred limit in the UK we must recall that most do not know what the current drink driving limit is.



Methods to Reduce Drink-Driving.

Most of the methods proposed are accepted by the majority of respondents, with the exception of 'abolishing 24 hour drinking'.

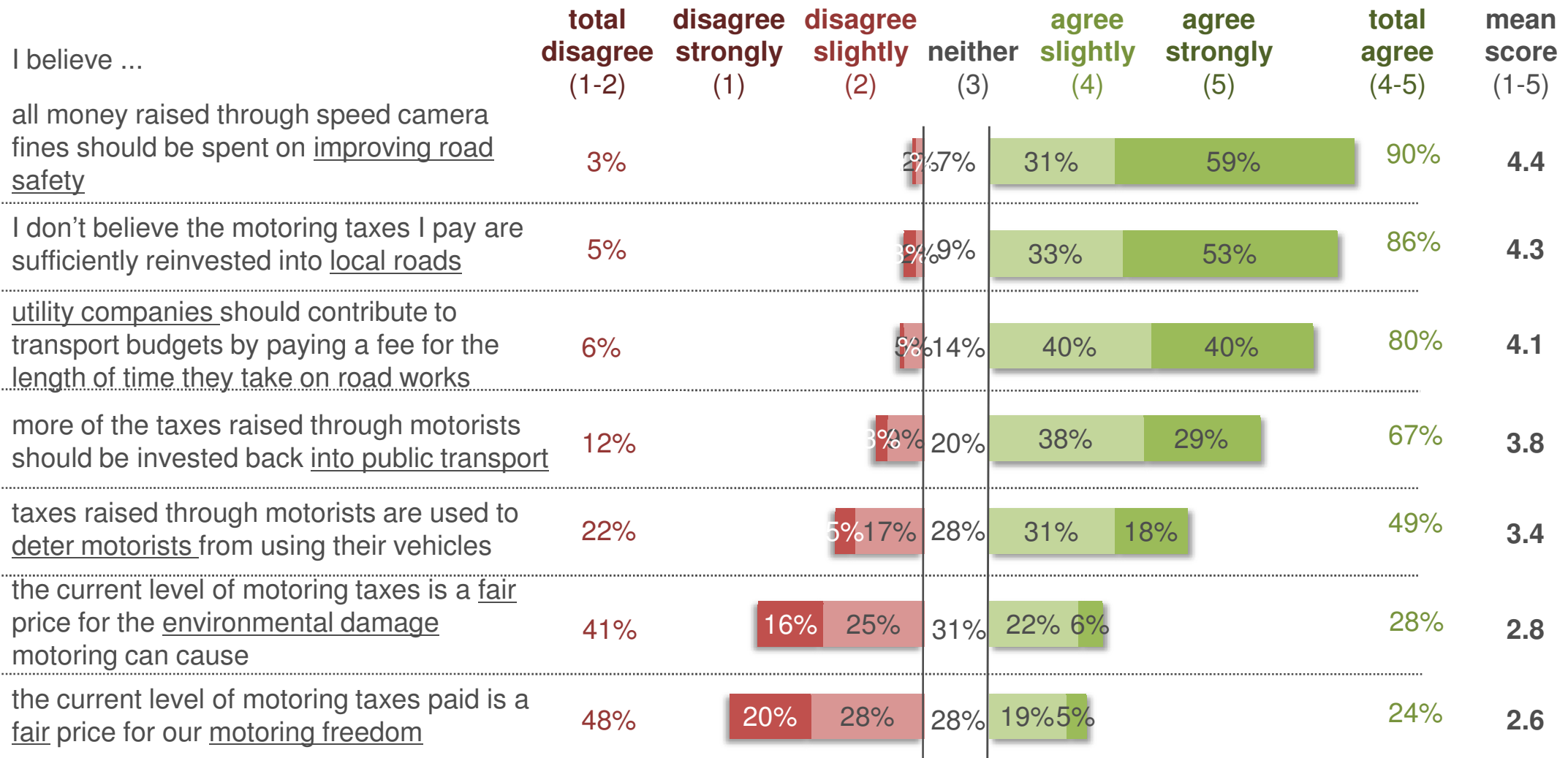




taxation

Motoring taxation.

90% feel that money raised via speed cameras should be invested in road safety and 86% feel that more tax needs to be reinvested into local roads. Over four-in-ten feel that the current levels of motoring taxes are not a fair price to pay – either for environmental damage or motoring freedom.

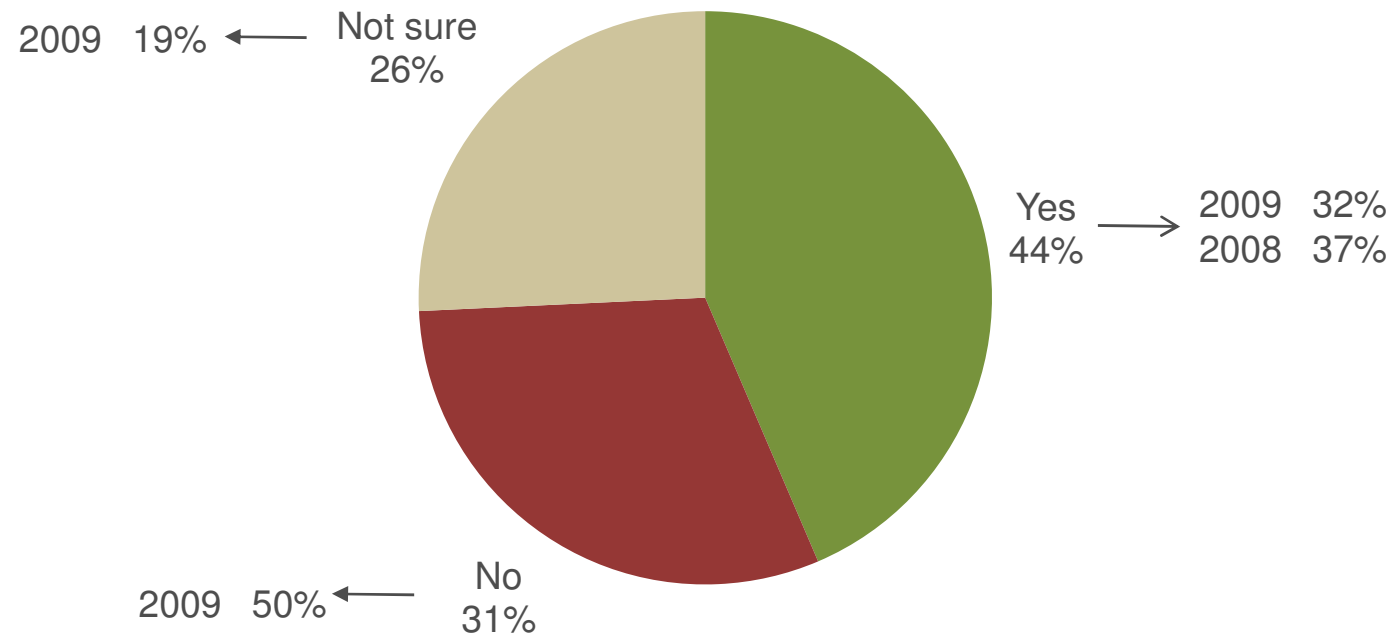


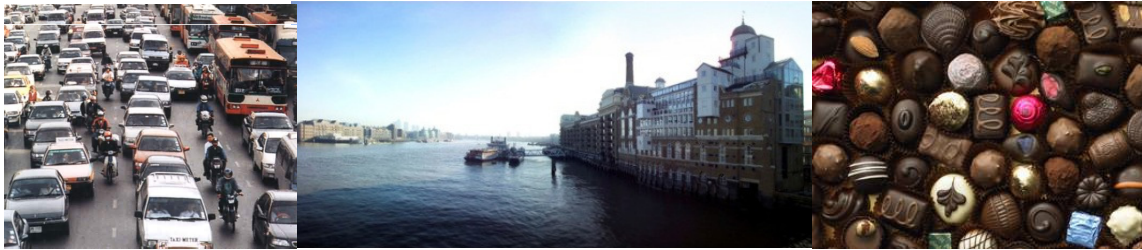
Awareness of Road Tax bands.

More than two-in-five motorists claim to be aware of the Road Tax bands. This level of awareness is an increase from 2009 and 2008.

Q9. At the 2008 Budget, the Chancellor announced a change to the car Road Tax bands (also known as Vehicle Excise Duty/ VED ratings). If your car is registered after 1 March 2001, there are a series of car road tax bands (A-M) which are based on fuel type and CO2 emission levels.

Are you aware of the current system of Road Tax (VED) bands A – M?

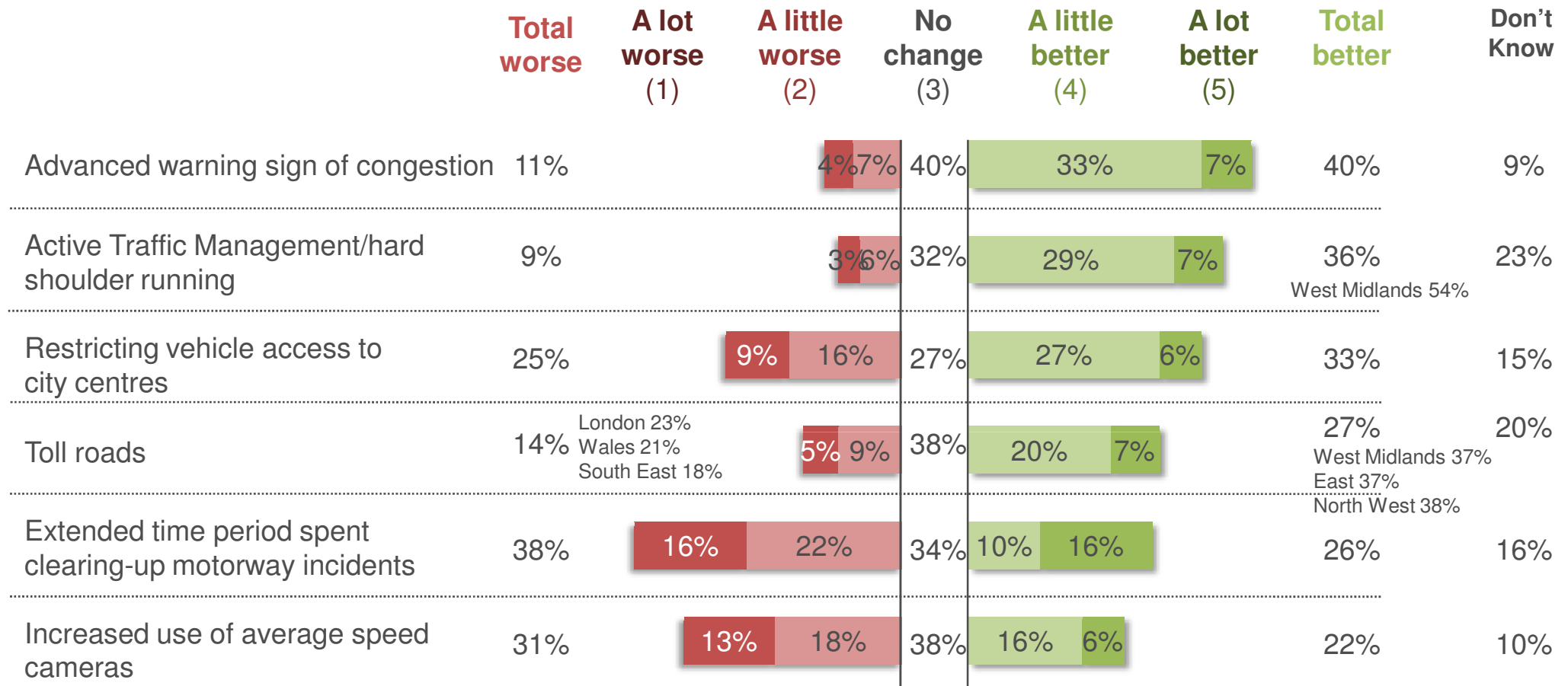




congestion on the road

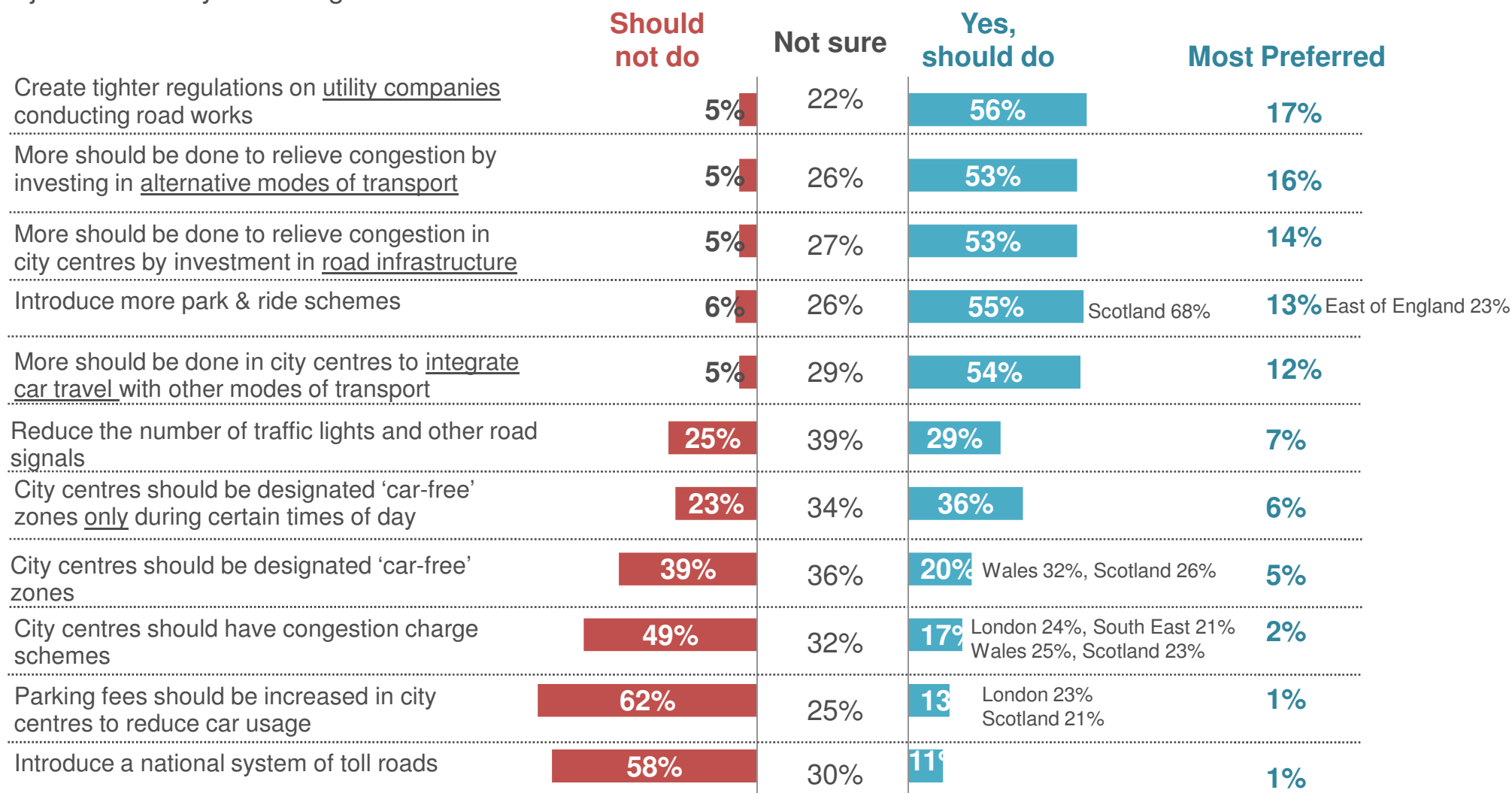
Impact on congestion.

Advanced warning signs are seen to have had the most positive effect on reducing congestion. Restricting access to city centres is polarising although more motorists feel it has had made congestion better.



Government measures to reduce congestion.

There are five measures which have equal appeal to motorists in government attempts to reduce congestion, three of which involve providing or integrating different modes of transportation. This should be viewed in conjunction with 65% who say they would use their car less if public transport and 79% who say they would find it very difficult to adjust their lifestyle to being without a car.

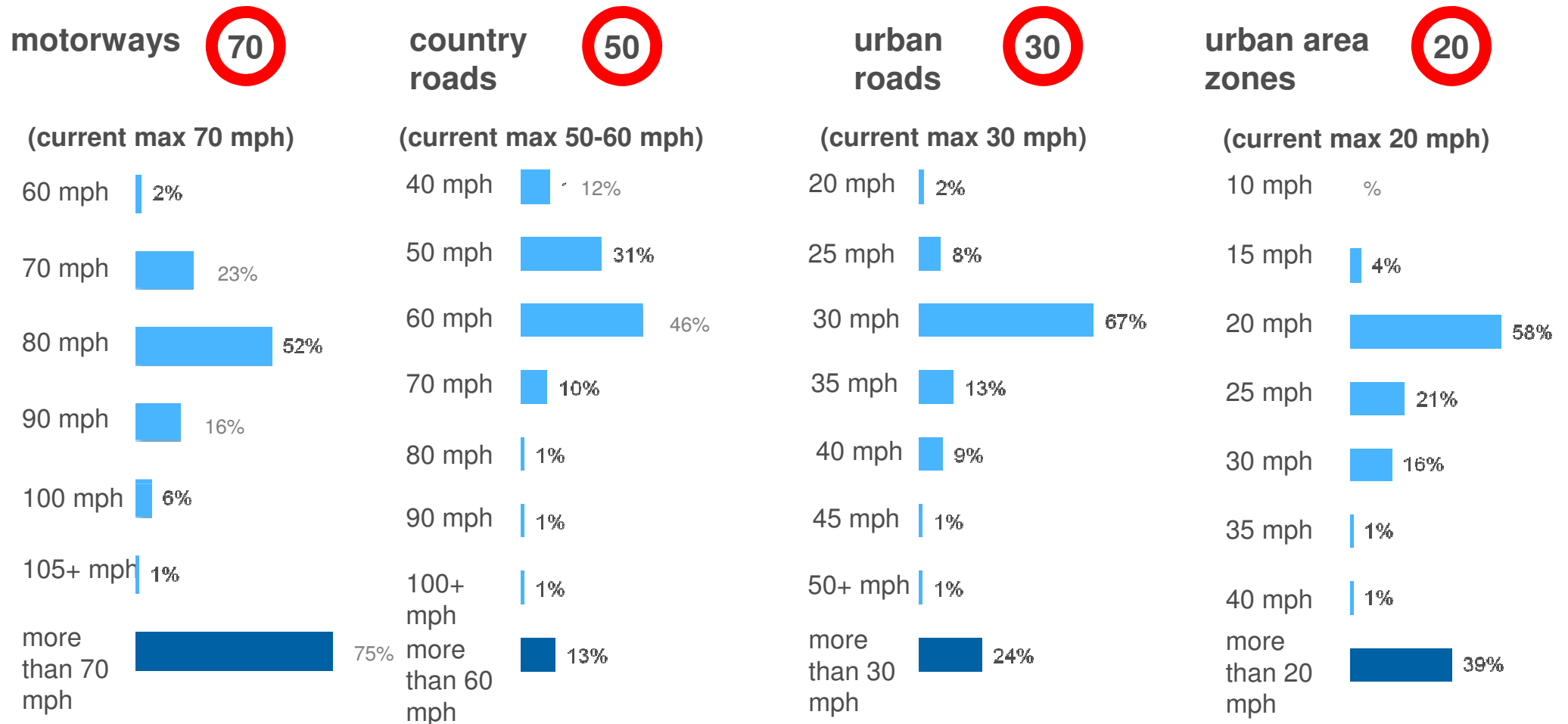




speeding

Opinion of maximum speed limits.

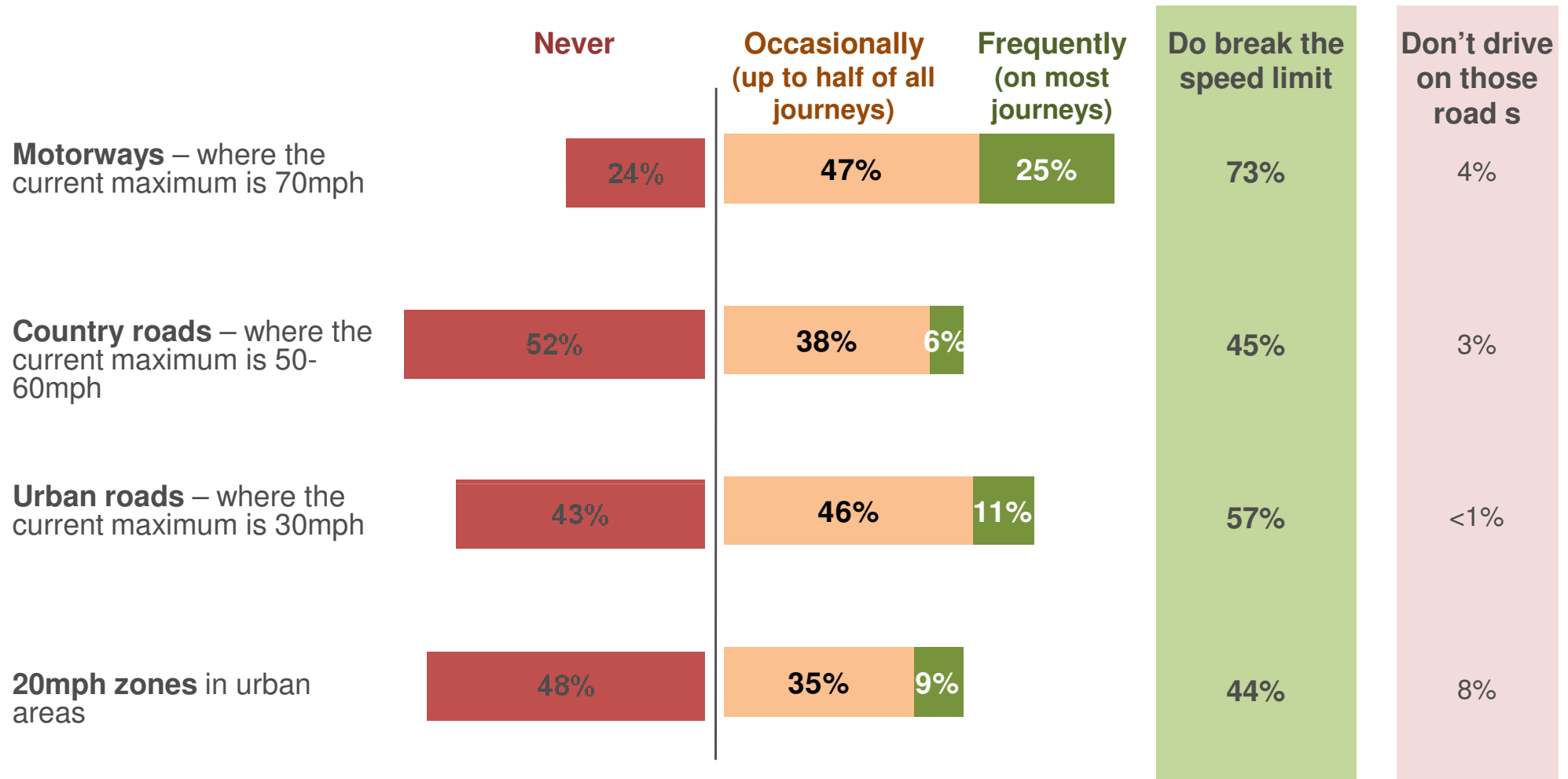
Three-quarters of motorists think that the speed limit on the motorways (the safest road to drive on) should be higher than the current limit of 70mph. However, the majority of motorists agree with the speed limit on country, urban roads and urban zones.



Frequency of breaking the speed limit.

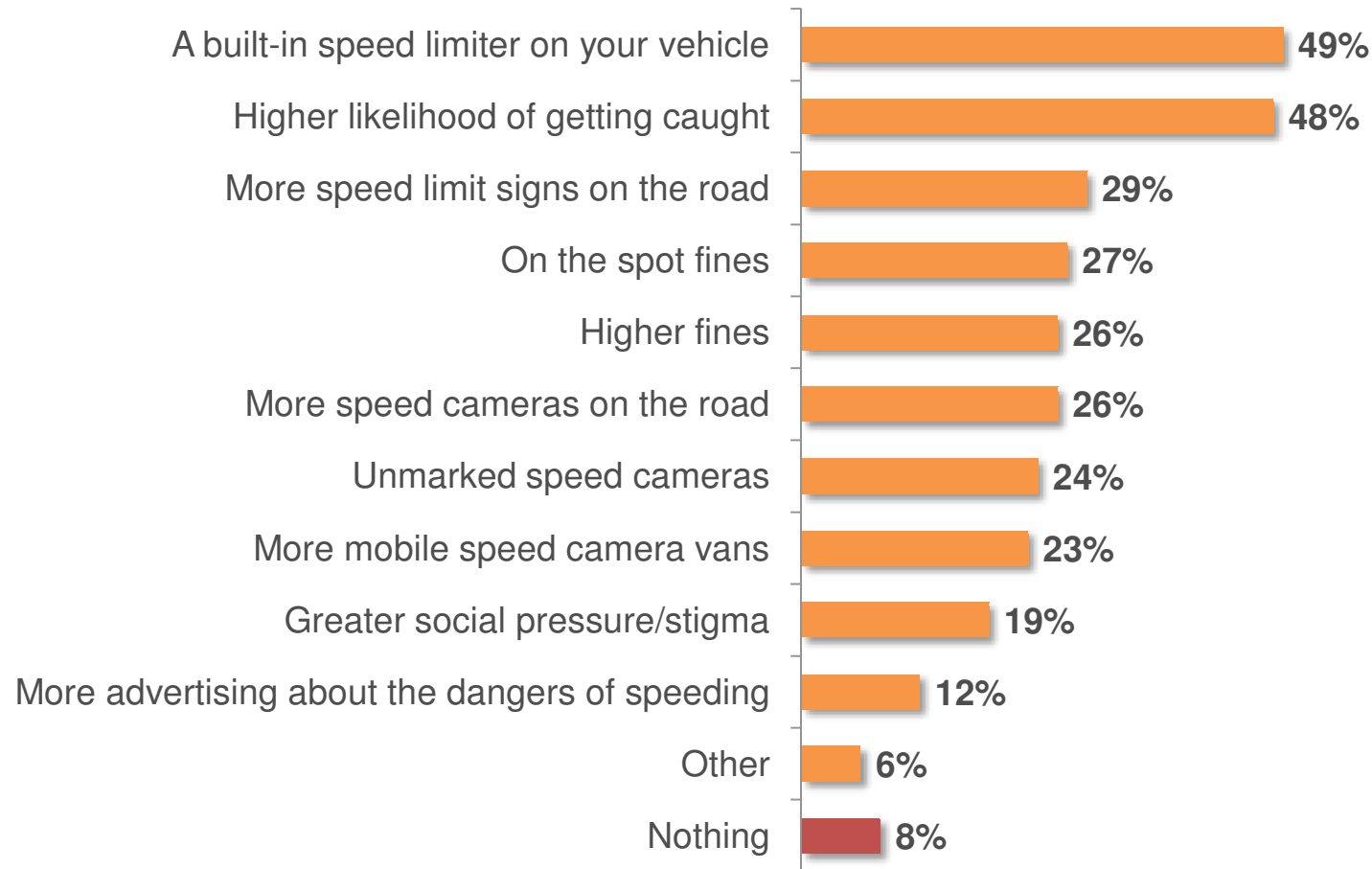
Motorists are most likely to break the speed limit on motorways – unsurprising given three-quarters want a higher speed limit on this type of road.

However, although more motorists speed on urban roads it was urban zones where more wanted a higher speed limit.



Motivations to stop speeding.

The top reasons that would stop motorists from speeding are built-in speed limiters and a higher likelihood of getting caught. Speed cameras do not appear to not motivate motorists to stop speeding.



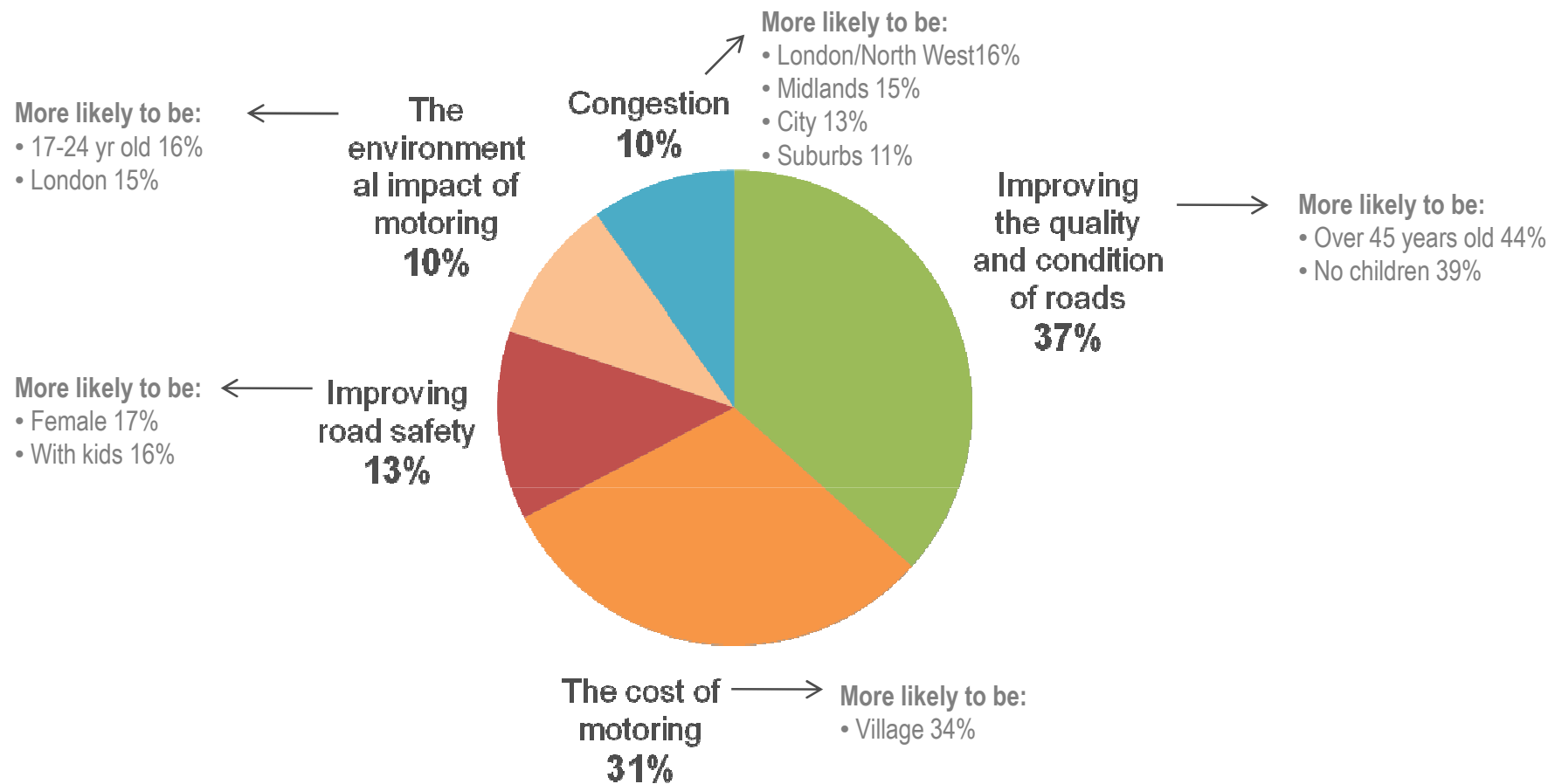


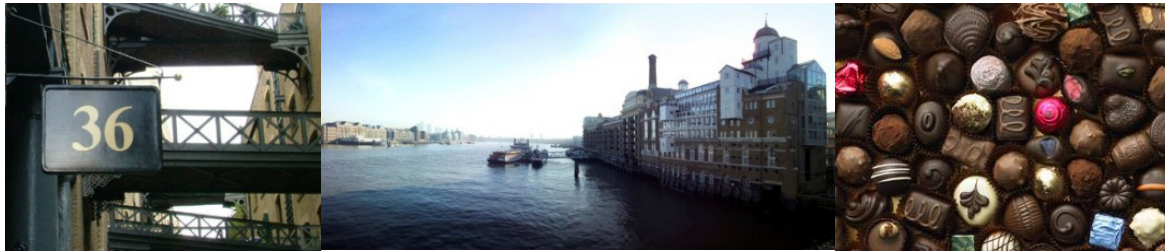
focus for the government

Focus for a new government.

Improving the quality of road conditions is seen to be the main area of priority for 37% but reducing the cost of motoring is a close second at 31%.

Q45 With a general election taking place this year, which one of the following areas do you think should be the main priority for a new government to tackle from a motoring point of view?

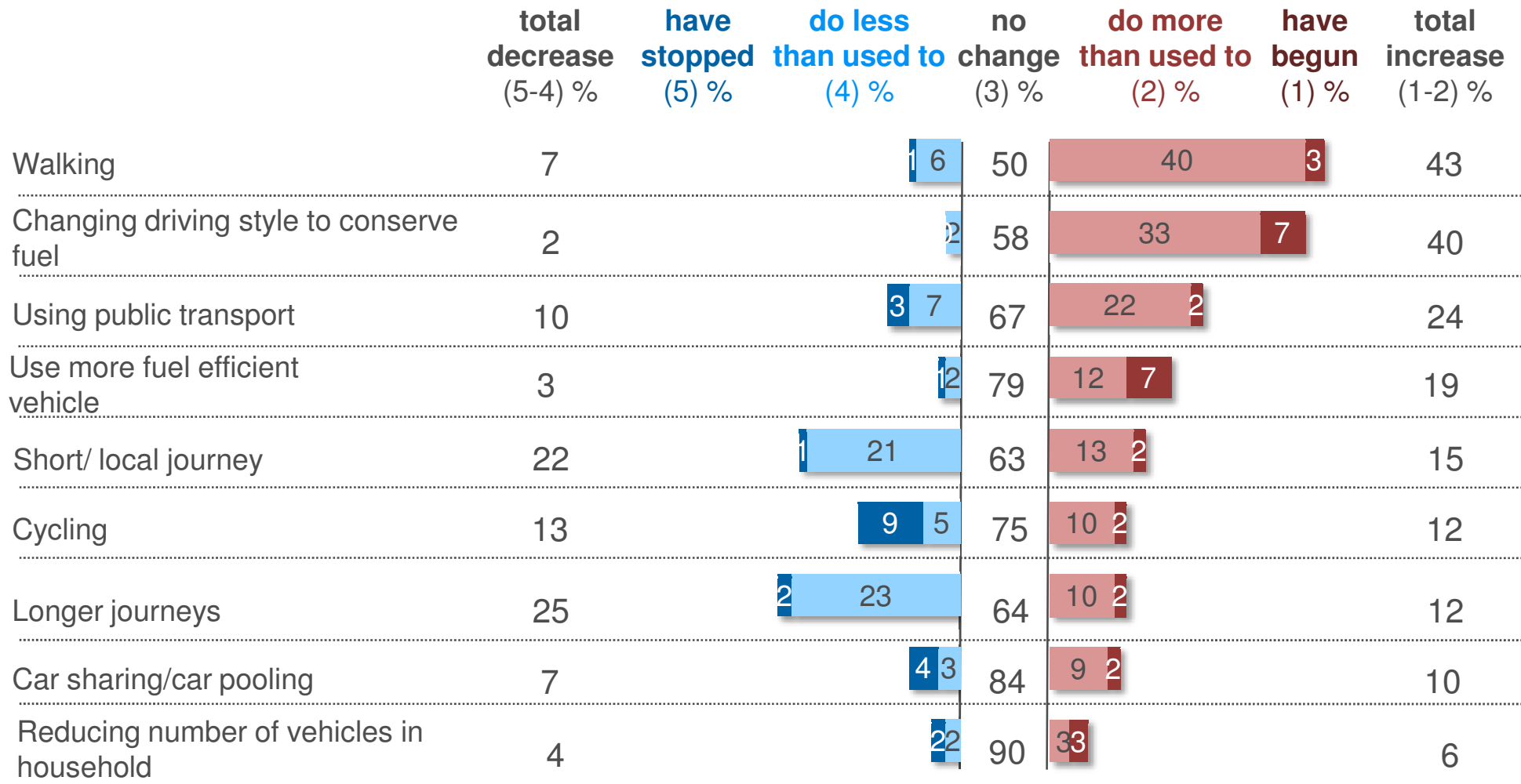




Appendix

Changing driving behaviour.

The actions that respondents are doing more of are walking and changing their driving style to conserve fuel. On the other hand they have decreased their number of short/local journeys and longer journeys. The results are on par with 2009 except 53% last year were driving better to conserve fuel compared but in 2010 motorists are more likely to say 'no change'.



Opinion of speed limits

– comparisons to previous year.

The percentage of people that believe that the maximum speed limit should be higher than it currently has increased from 2009 for motorways and country roads.

What in your opinion should the maximum speed limit be on the following types of road:

motorways

70

country roads

50

urban roads

30

urban area zones

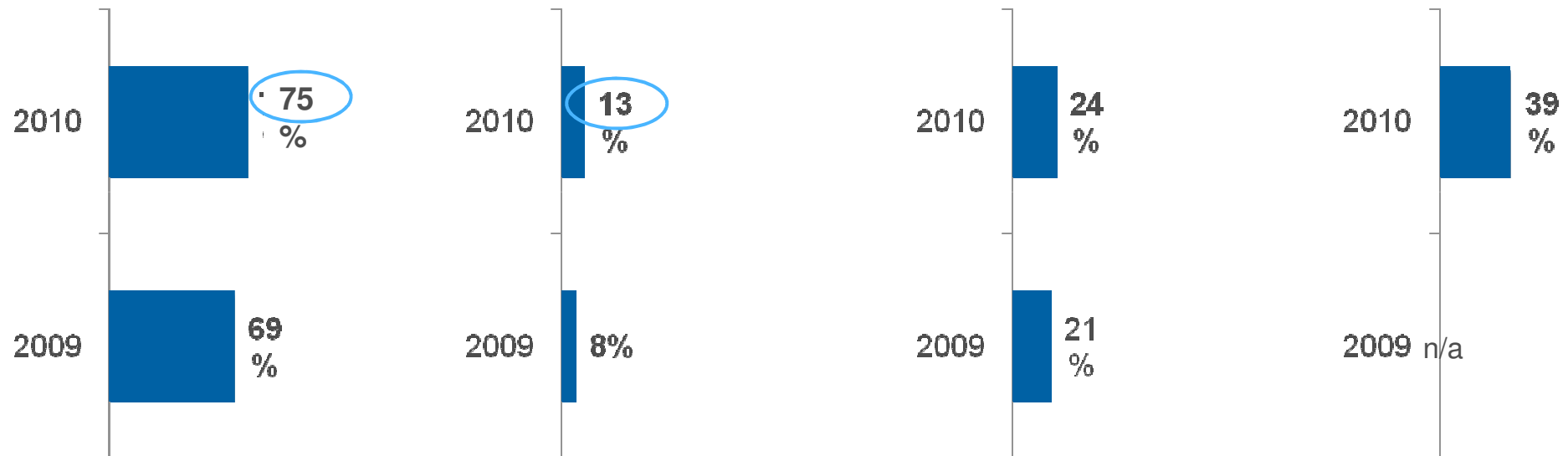
20

% saying more than 70mph

% saying more than 60mph

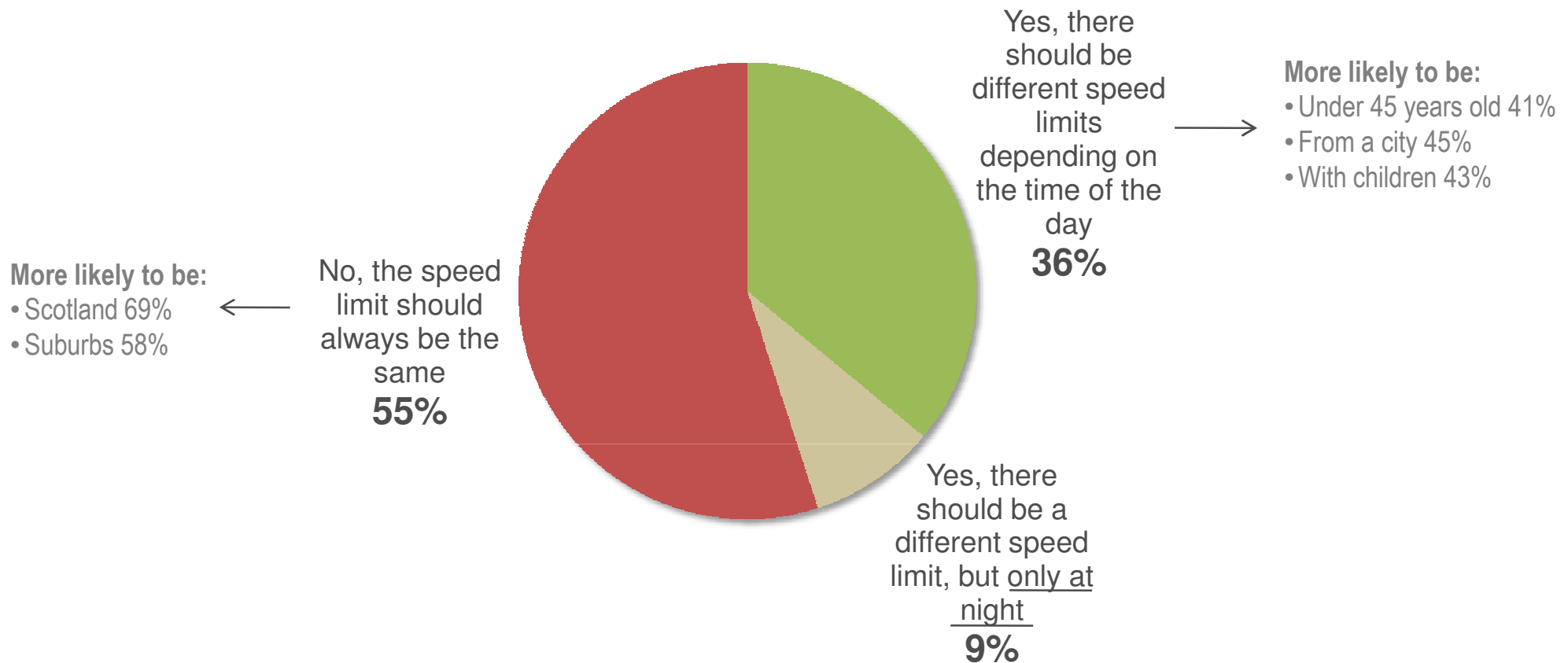
% saying more than 30mph

% saying more than 20mph



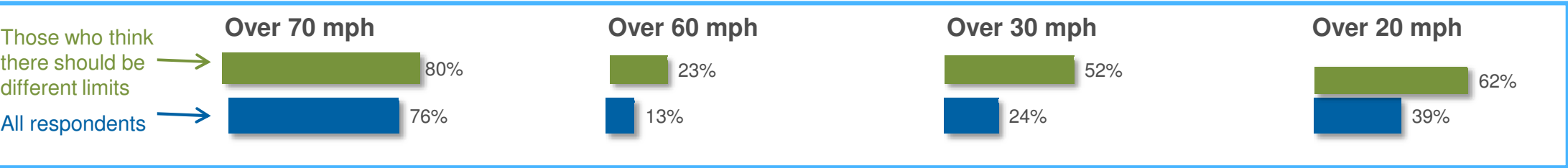
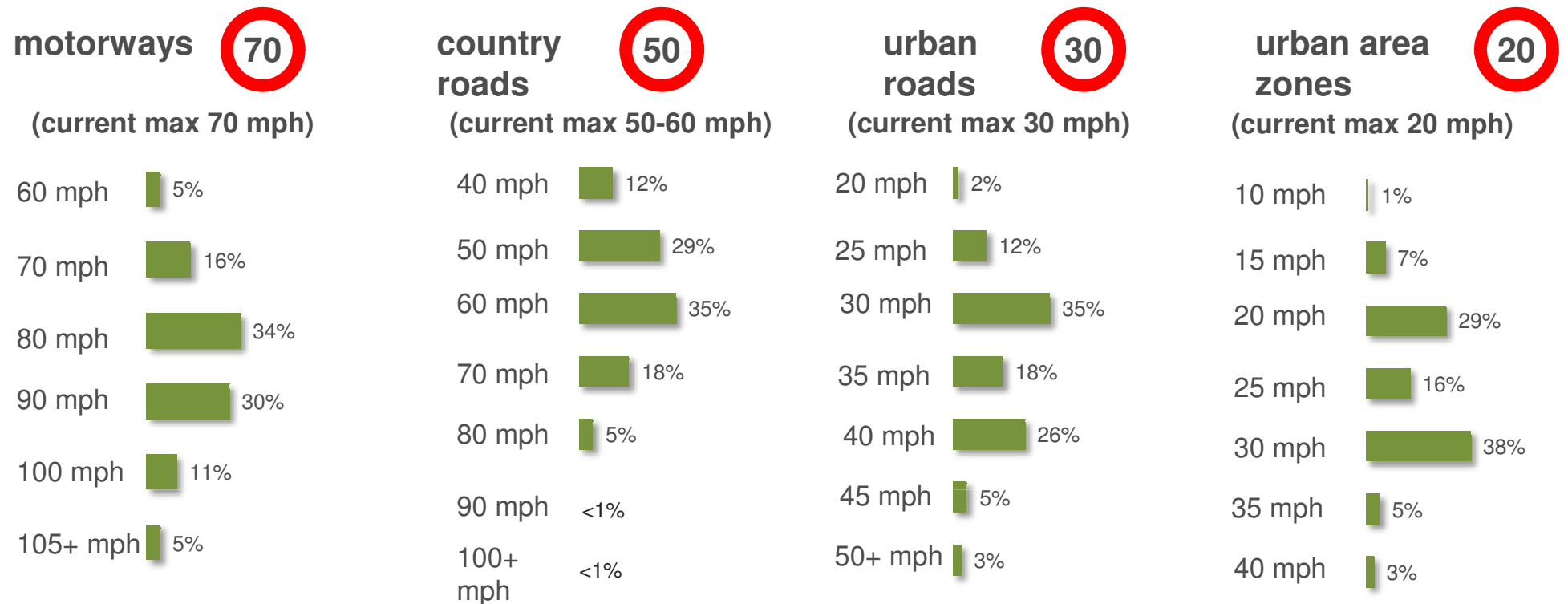
Different speed limits at different times.

The majority of motorists (55%) don't think that there should be different speed limits at different times of day. Over one-third (36%) feel that a variable speed limit is appropriate at depending on the time of day – particularly those with children in the household.



Opinion of maximum speed limits at different times.

The largest difference between what speed 'standard' daytime speed limits should be and 'variable' limits at night are on urban roads and urban zones.

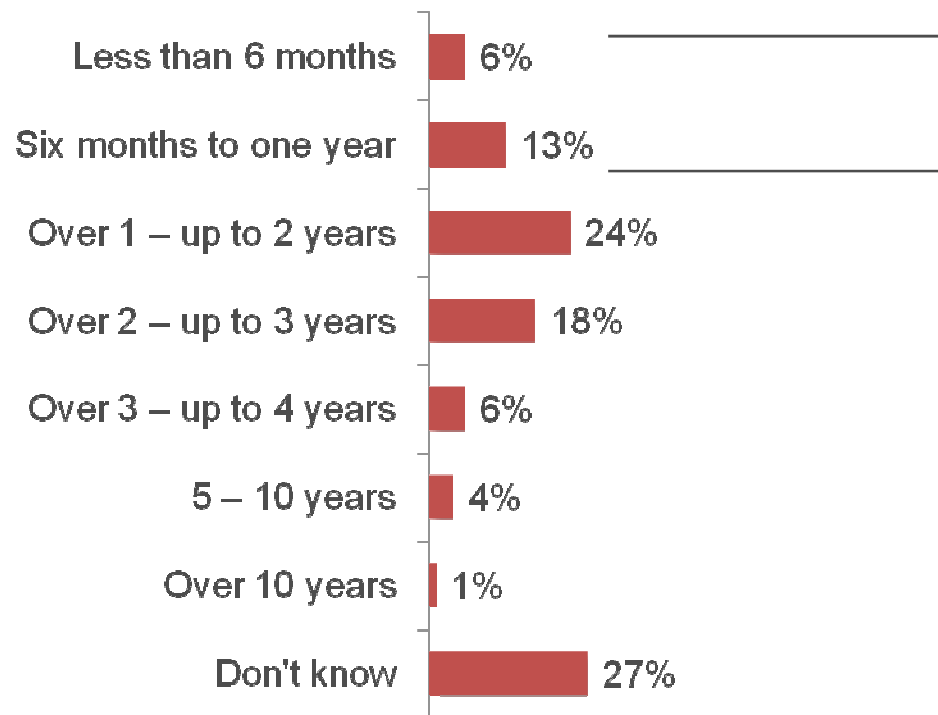


Vehicle replacement intention period.

Despite some economic recovery in the UK since April 2009 there has been no change in how long motorists are likely to replace their current vehicle with a new one.

Q32. When do you intend to replace your current car?

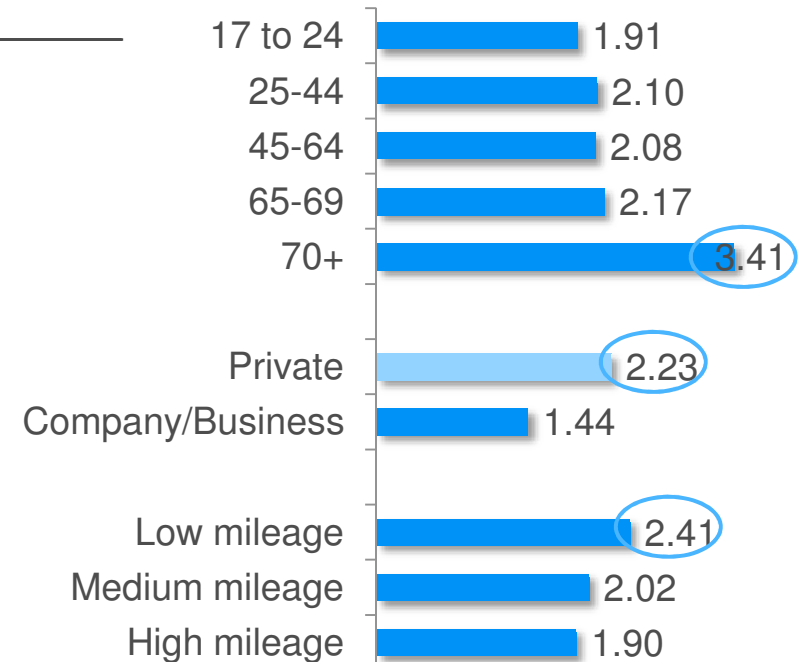
Base: all respondents (n=1,150)



Total average time 2.15 yrs

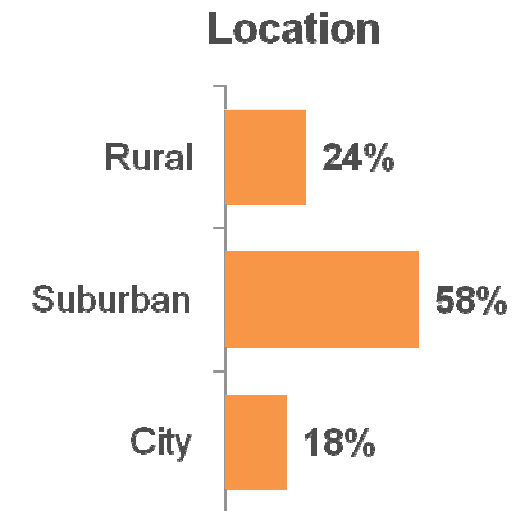
Total average time 2009 2.08 yrs

Profile of those intending to change their vehicle in the next 12 months.



Region.

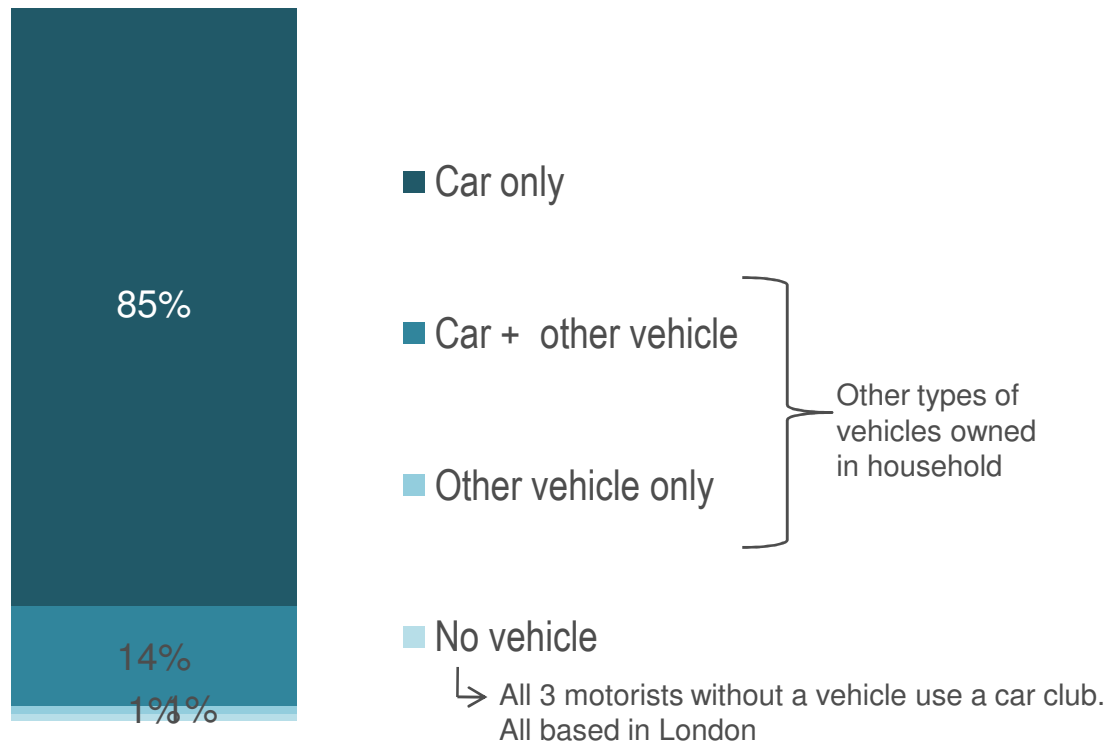
	Quota set (n=1,000)	Achieved (n=1,150)	Weighted (n=1,150)
East Midlands	7%	8%	7%
East of England	9%	9%	9%
London	13%	12%	13%
North East	4%	5%	4%
North West	12%	13%	12%
Scotland	9%	7%	9%
South East	14%	16%	14%
South West	9%	9%	9%
Wales	5%	4%	5%
West Midlands	9%	9%	9%
York/Humb.	9%	9%	9%



Cars and vehicles in household.

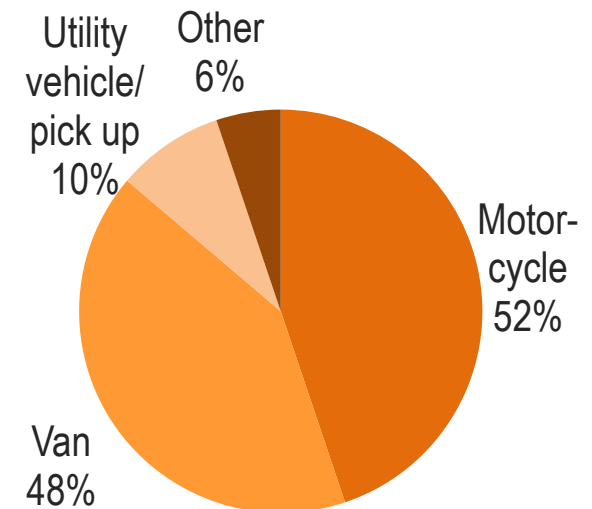
SQ6. What type of motor vehicle(s) do you have in your household?

Base: all respondents (n=1,150)



SQ7. 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: those that have other vehicles in household (n=164)



Motoring/ car ownership/ car purchase.

	Quota set (n=1,000)	achieved (n=1,150)	weighted (n=1,150)
Hold current driving licence	N/A	100%	100%
Drive car at least monthly nowadays	NA	100%	100%
Car ownership			
Privately owned	90%	88%	91%
Provided by company	10%	6%	9%
Car purchase			
New	N/A	36%	38%
Nearly new	N/A	19%	18%
Second- hand used	N/A	45%	44%

SQ8 Do you personally hold a full current UK driving license?

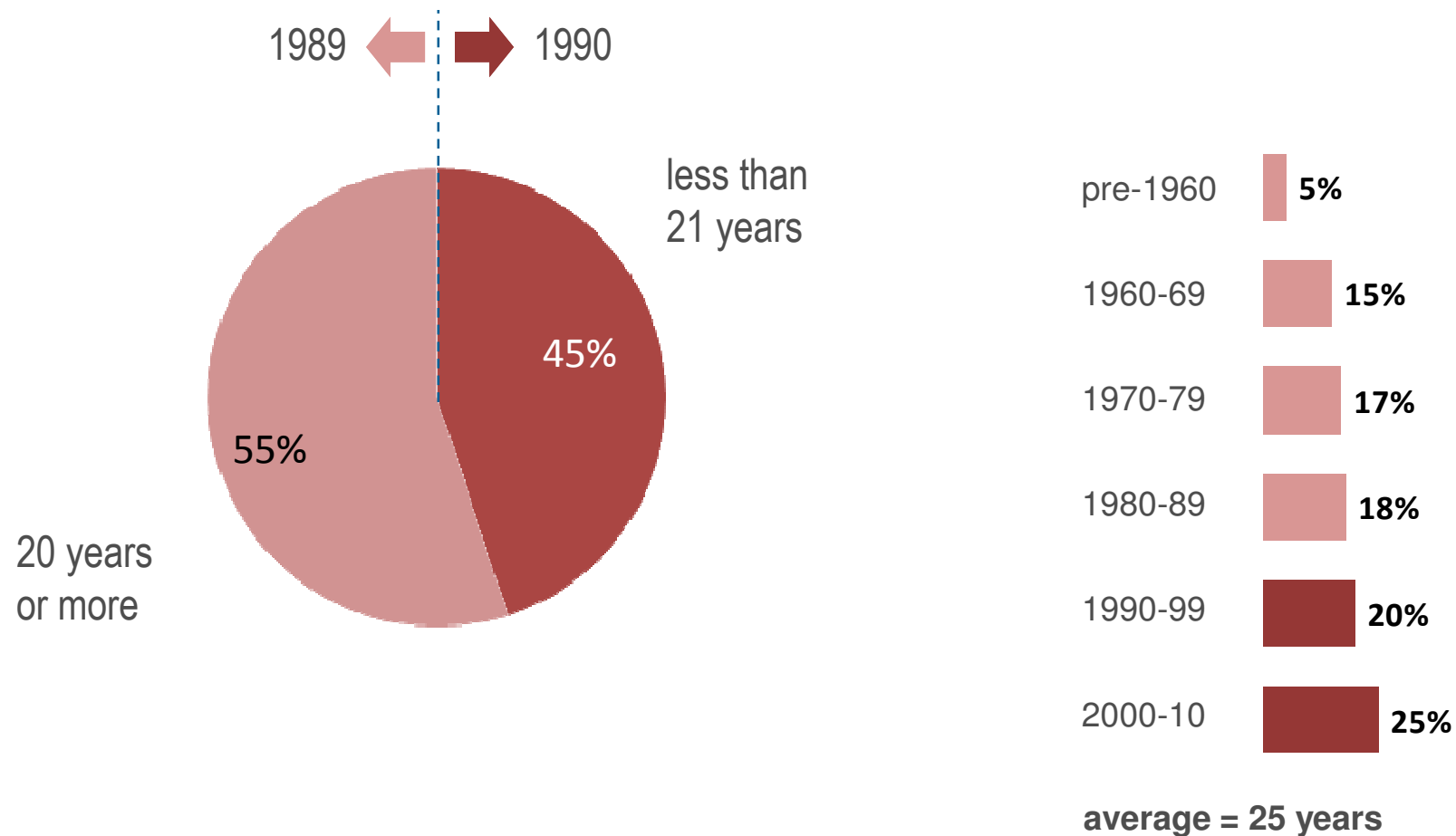
SQ9 How often do you drive your car nowadays?

SQ11 How was the car you use bought?

SQ12 Was your car bought from...?

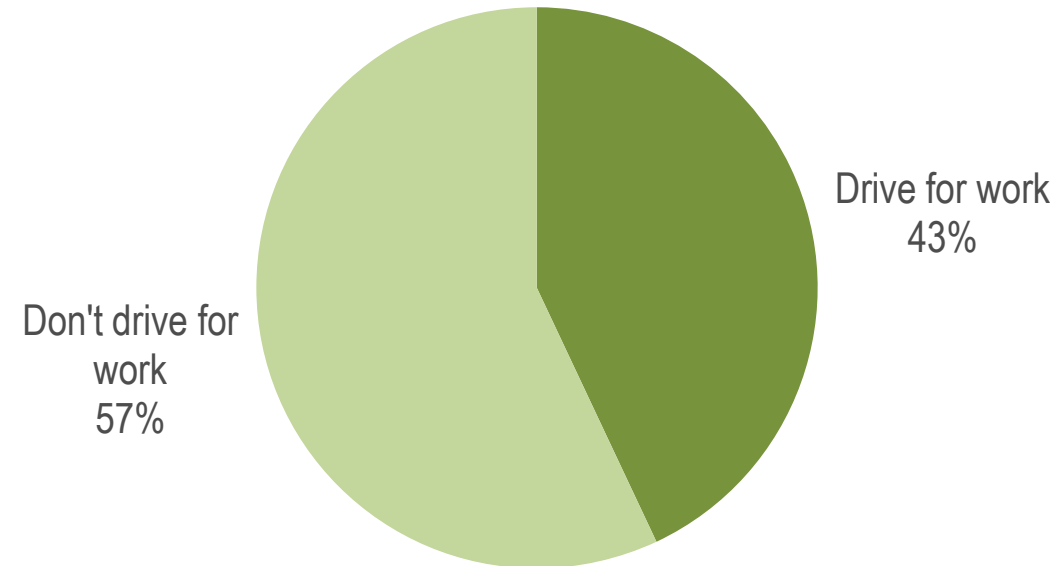
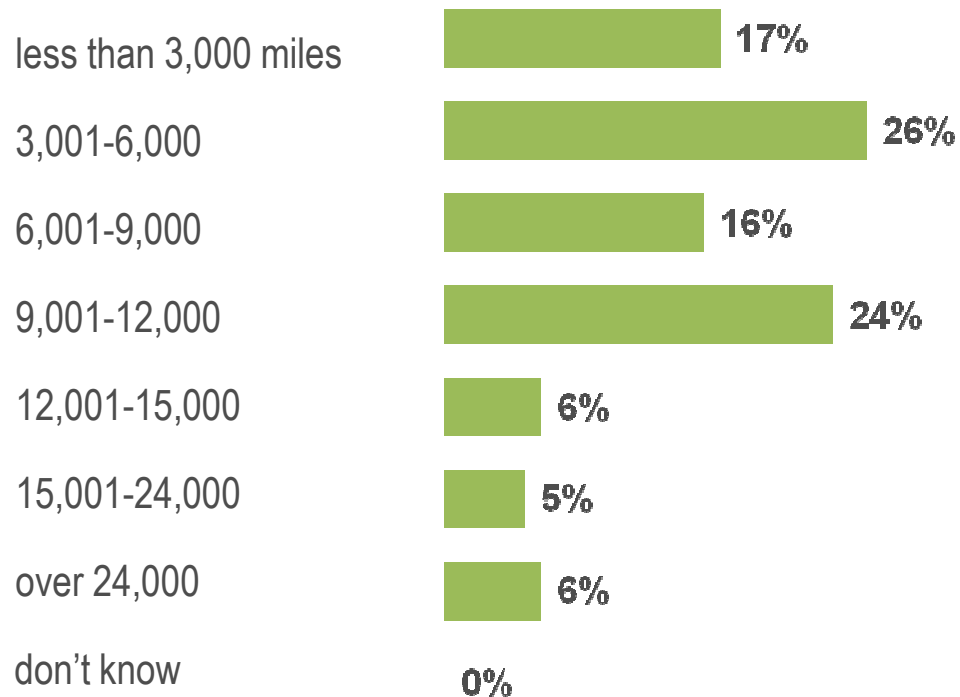
Base: all respondents (n=1,150)

Length of time driving.



Annual mileage.

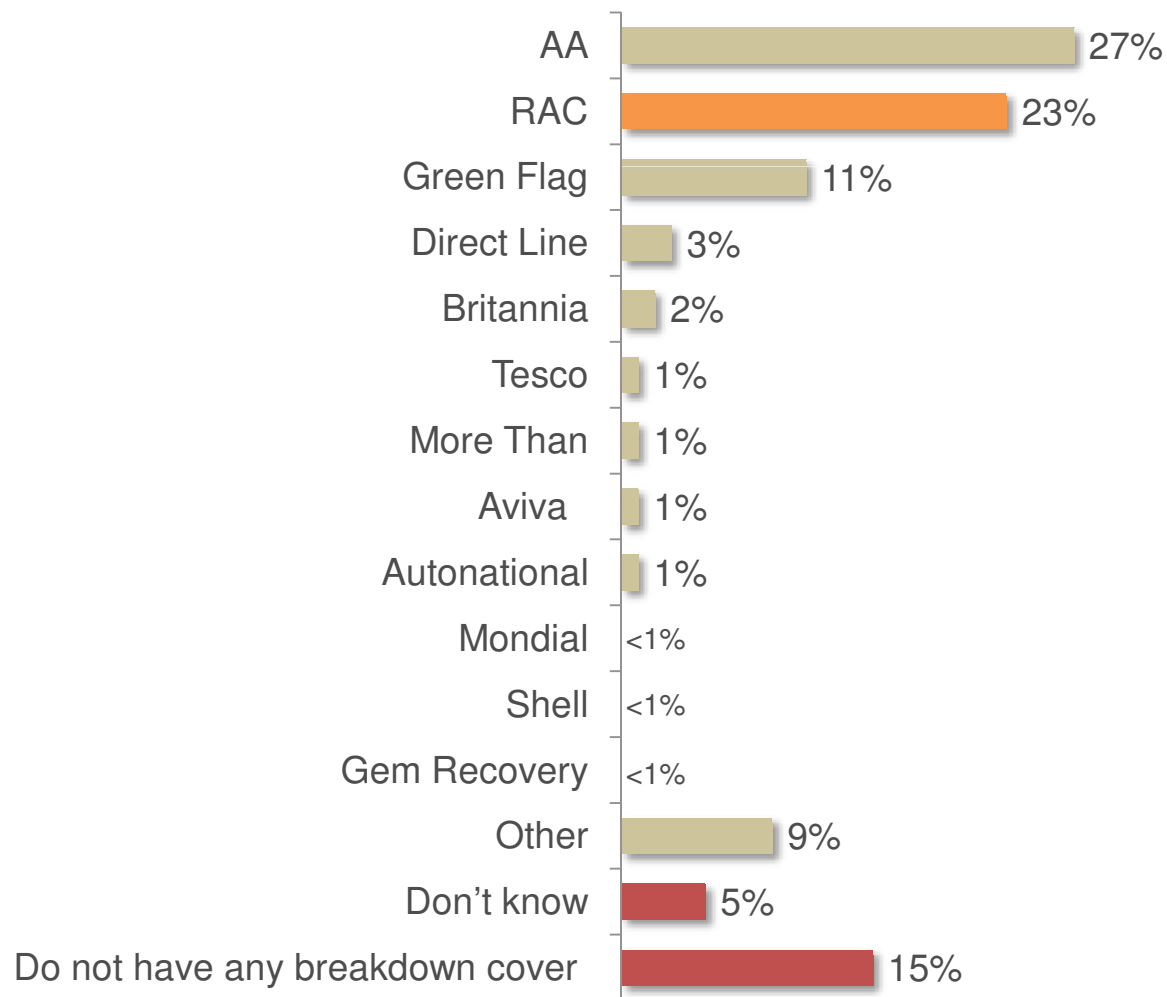
Miles travelled per year:

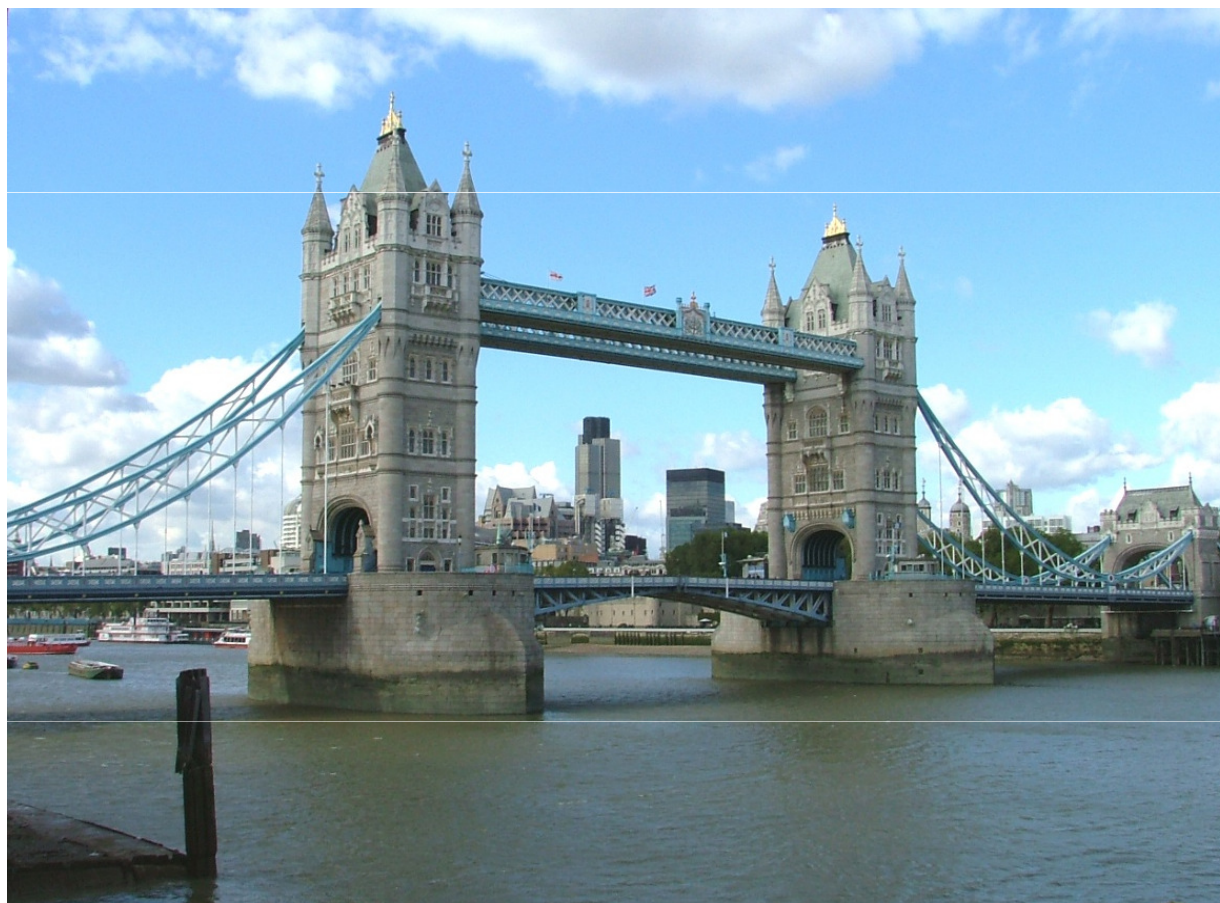


Annual average:

all motorists	9,335
all company car drivers	22,165
all private motorists	8,055
those that drive in connection with work	12,738
miles driven for work	7,075

Breakdown cover provider.





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