



RAC Report on Motoring 2014

Motorists' Survey – Research Report

RAC RoM Advisory Panel

Document prepared for:
RAC RoM Advisory Panel

Document prepared by:
Kendra Noonan kendra.noonan@quadrangle.com
Martyna Elliot-Cooke martyna.elliott-cooke@quadrangle.com
Patrick Banks patrick.banks@quadrangle.com



quadrangle

the butlers wharf building, 36 shad thames, london se1 2ye
t +44 (0)20 7357 9919, f +44 (0)20 7357 9773,
www.quadrangle.com

What we did.

A 25 minute survey with 1,526 motorists in Great Britain

- Motorists were nationally representative in terms of age, gender, socio-economic groups, all GB regions, company car drivers and new car buyers
- The survey was conducted online at the beginning of February 2014
- The purpose of the survey is to ask motorists a wide range of topics that are relevant to motoring today



Topics to be covered today.



Significant differences between key groups highlighted

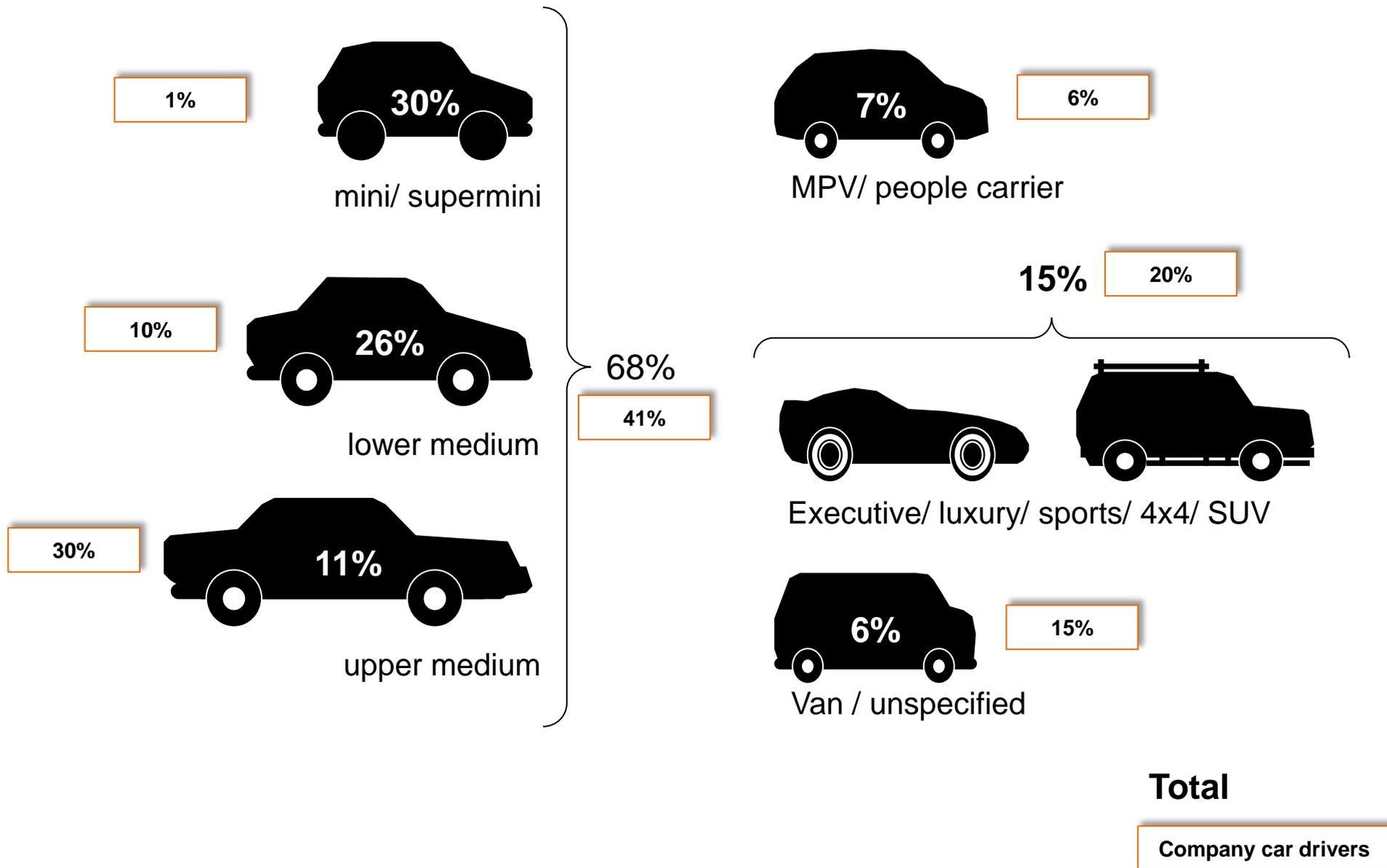


Note: Numbers may be rounded and may not add exactly to 100%



About the motorist.

Type of car owned.



Number of cars per household.

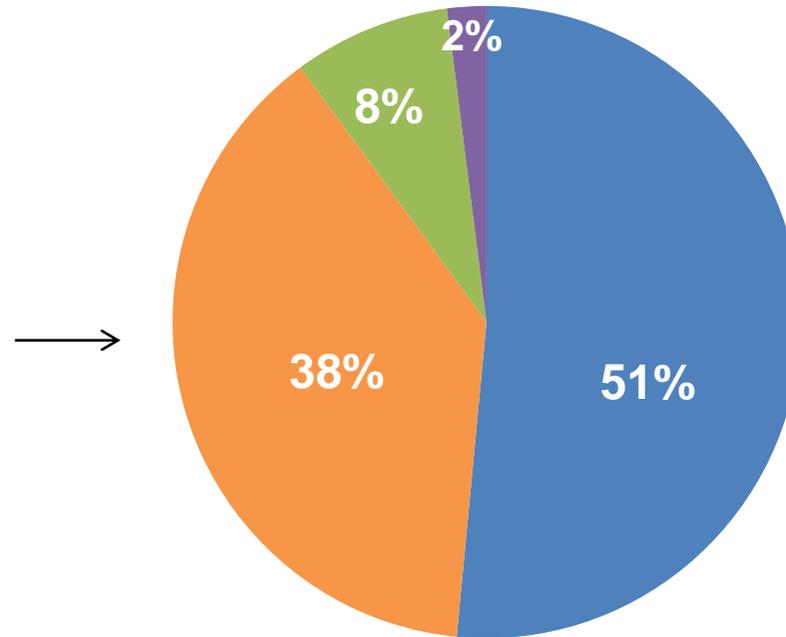
One-half of motorists have more than 1 car in their household, with younger, more affluent and rurally-located drivers typically having more cars per household than the average.

Average no. of cars

By age:	
17-24	1.9
25-44	1.6
45-64	1.7
65+	1.4

By SEG:	
ABC1	1.7
C2DE	1.5

By location:	
City	1.5
Suburban	1.6
Rural	1.8



No. cars: ■ 1 ■ 2 ■ 3 ■ 4

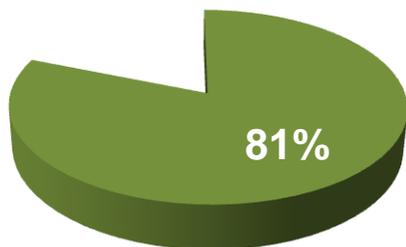
Average 2014: 1.6 cars
Average 2013: 1.6 cars
Average 2012: 1.5 cars
Average 2011: 1.7 cars



Motoring behaviour.

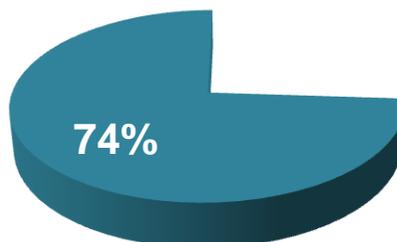
Multi-modal motorists.

Motorists are reliant on their vehicles, but on a weekly basis do use other forms of transport.



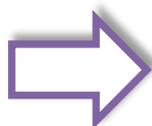
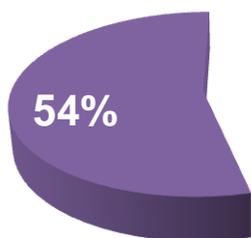
I would find it very difficult to adjust my lifestyle to being without a car
(+3% from 2013)

They drive their own car **and** use another mode of transport at least 1-3 times per week (including walking).



Multi modal motorists are more likely to...

30% live in a city or town centre vs. 21% of car only drivers
14% live in London vs. 7% of car only drivers
63% travel to major UK cities vs. 53% of car only drivers



They drive their own car **and** use another mode of transport at least 1-3 times per week (**excluding walking**).

These multi modal motorists are more likely to...

31% live in a city or town centre vs. 23% of car only drivers
16% live in London vs. 8% of car only drivers
65% travel to major UK cities vs. 56% of car only drivers

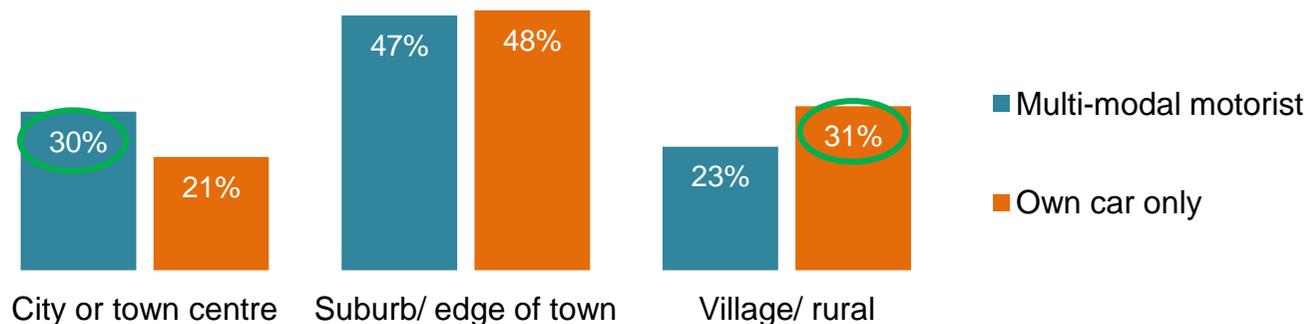
Location in more detail.

A multi-modal motorist is more likely to live in a city or town centre, compared to a motorist who only drives their car.



No significant demographic differences among typical motorists, multi-modal motorists, or those who only drive their car.



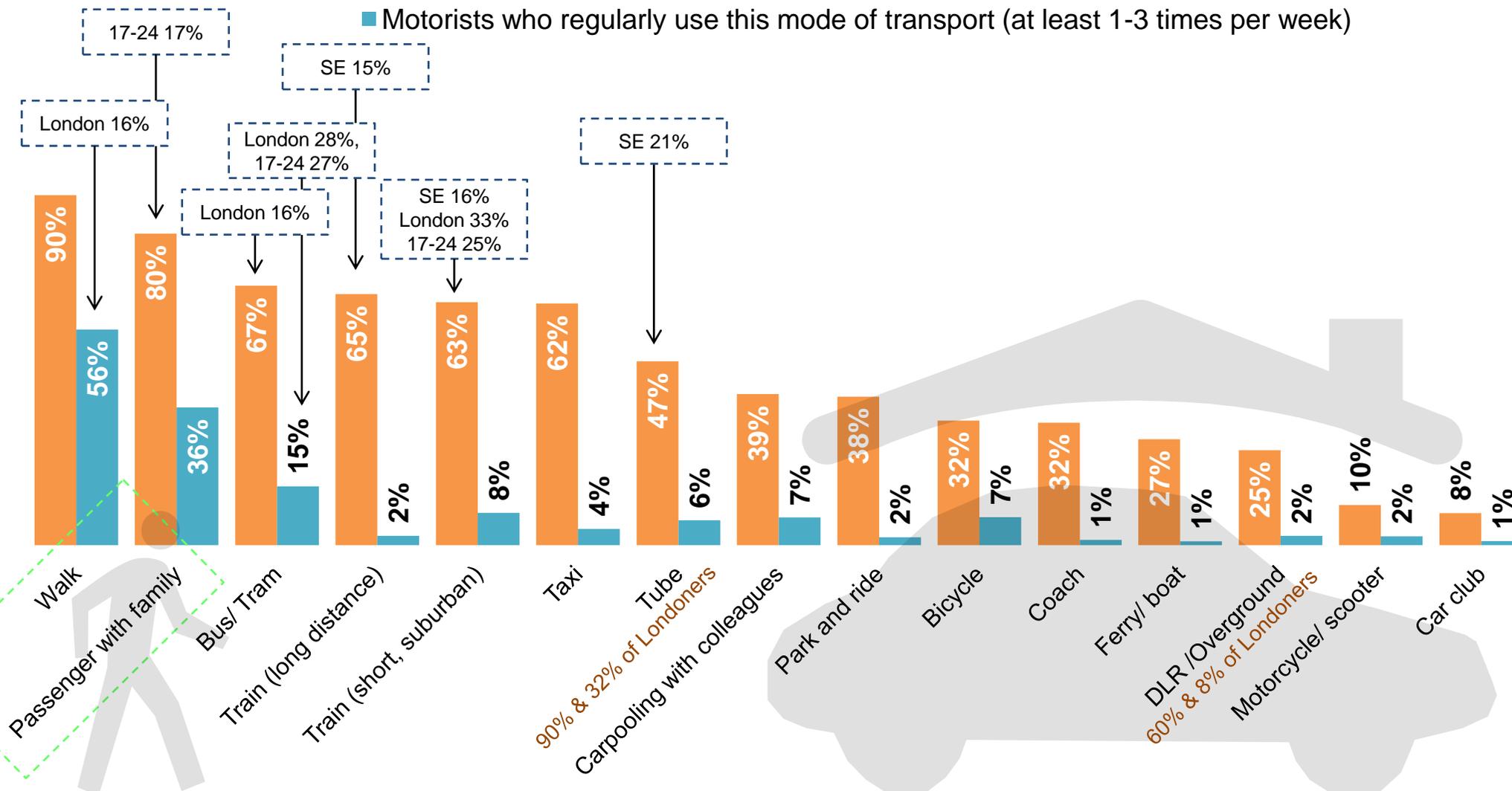


Motorists drive and...

...walk, or travel with other members of their household. Usage of other modes of transport is occasional.

■ Motorists who use this mode of transport at all

■ Motorists who regularly use this mode of transport (at least 1-3 times per week)



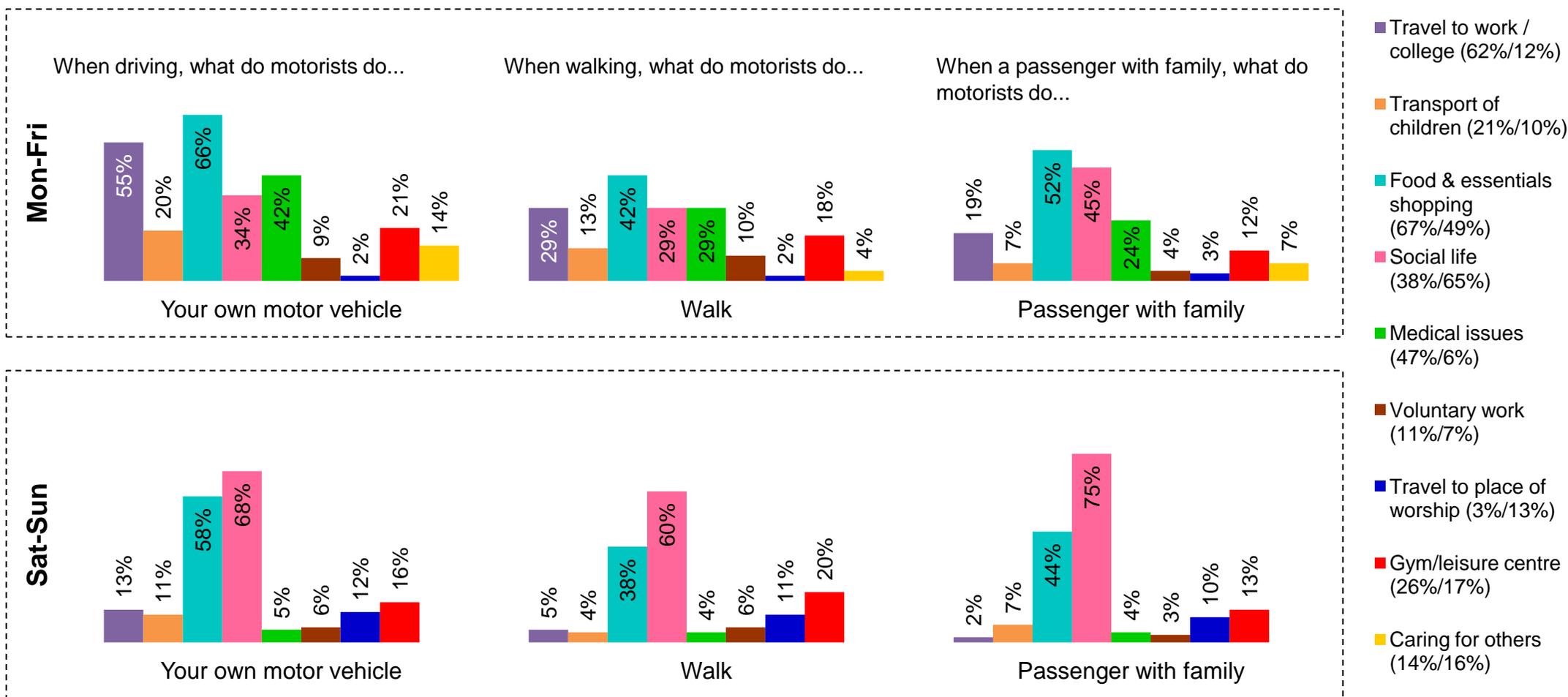
Activities done when using each mode of transport (1).

100% drive a car

90% walk

80% passenger with family members

← % of total sample



Activities done when using each mode of transport (2).

67% travel on the bus

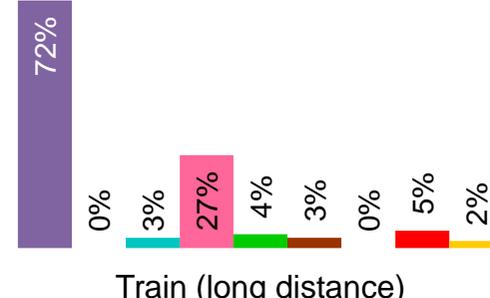
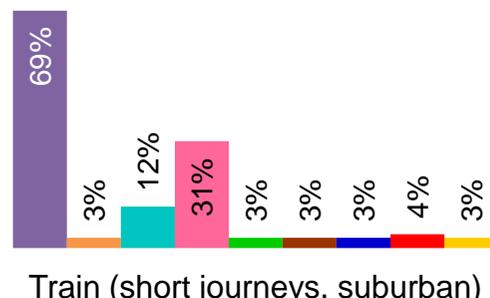
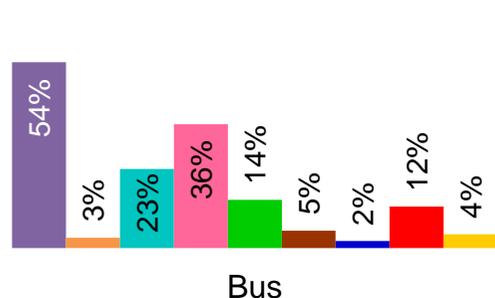
63% travel on the train (short distance)

65% travel on the train (long distance)

← % of total sample

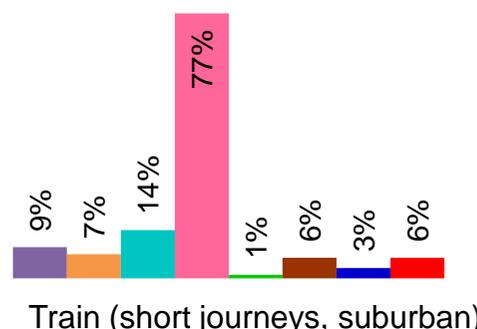
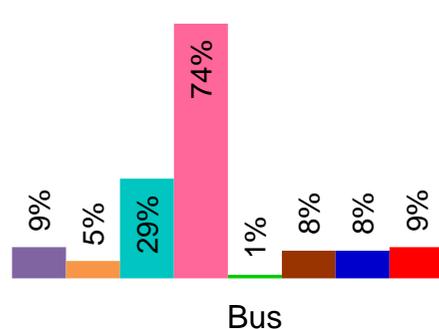
When taking a bus, what do motorists do...

Mon-Fri



- Travel to work / college (62%/12%)
- Transport of children (21%/10%)
- Food & essentials shopping (67%/49%)
- Social life (38%/65%)
- Medical issues (47%/6%)
- Voluntary work (11%/7%)
- Travel to place of worship (3%/13%)
- Gym/leisure centre (26%/17%)
- Caring for others (14%/16%)

Sat-Sun



Base too low to allow for meaningful analysis (below 50)

Activities done when using each mode of transport (3).

32% cycle

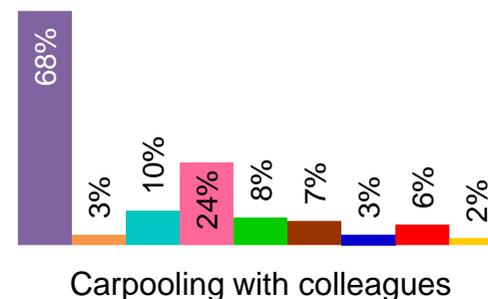
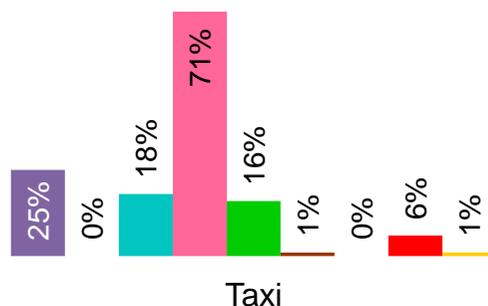
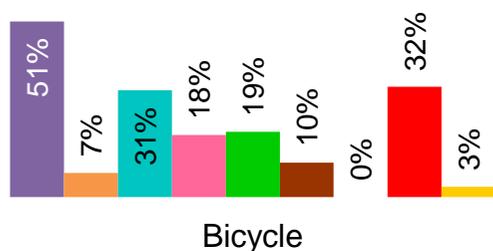
62% take a taxi

39% carpool with colleagues

← % of total sample

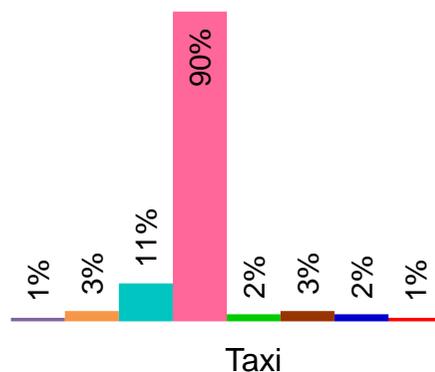
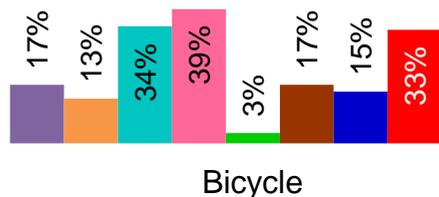
When cycling, what do motorists do...

Mon-Fri



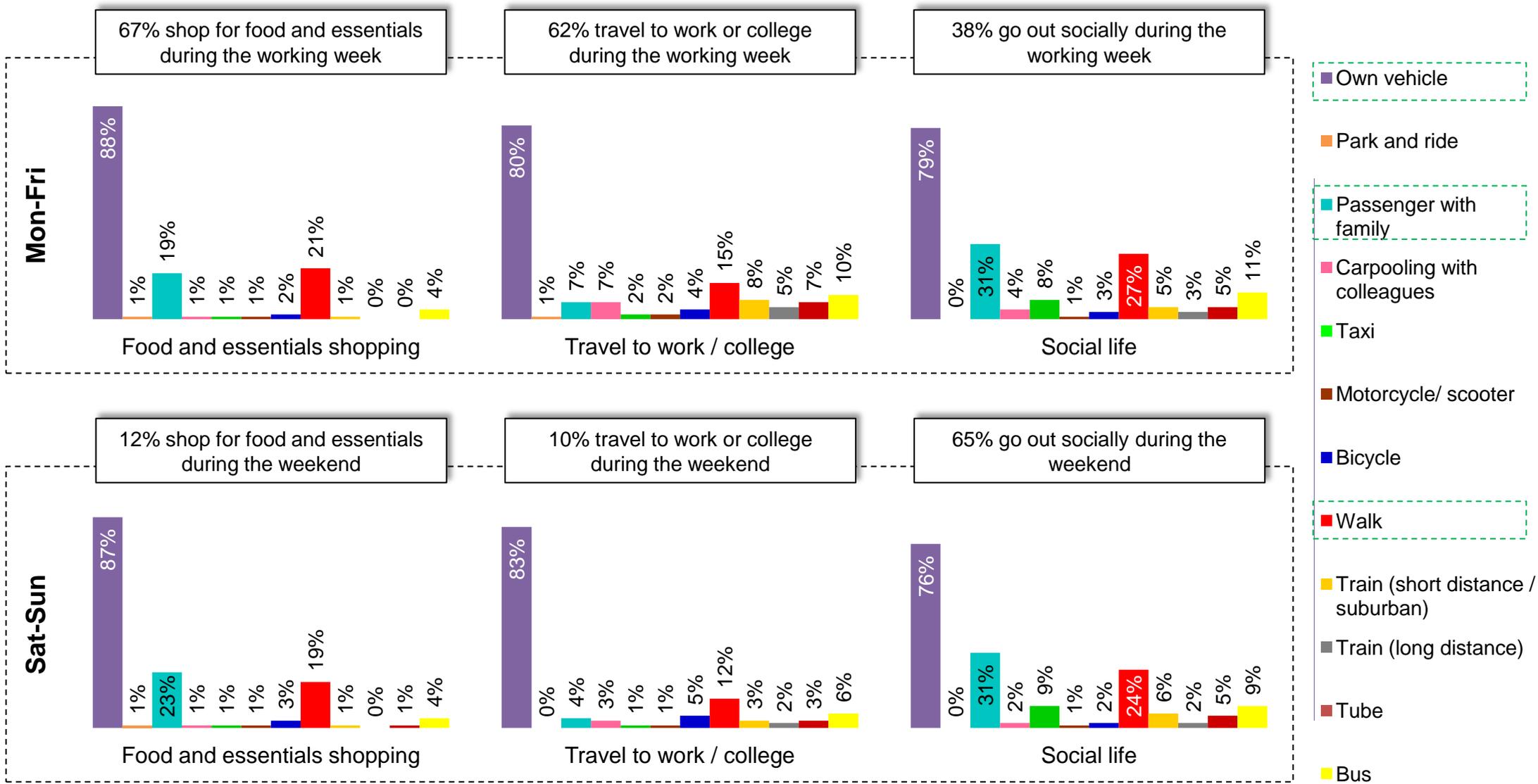
- Travel to work / college (62%/12%)
- Transport of children (21%/10%)
- Food & essentials shopping (67%/49%)
- Social life (38%/65%)
- Medical issues (47%/6%)
- Voluntary work (11%/7%)
- Travel to place of worship (3%/13%)
- Gym/leisure centre (26%/17%)
- Caring for others (14%/16%)

Sat-Sun



Base too low to allow for meaningful analysis (below 50)

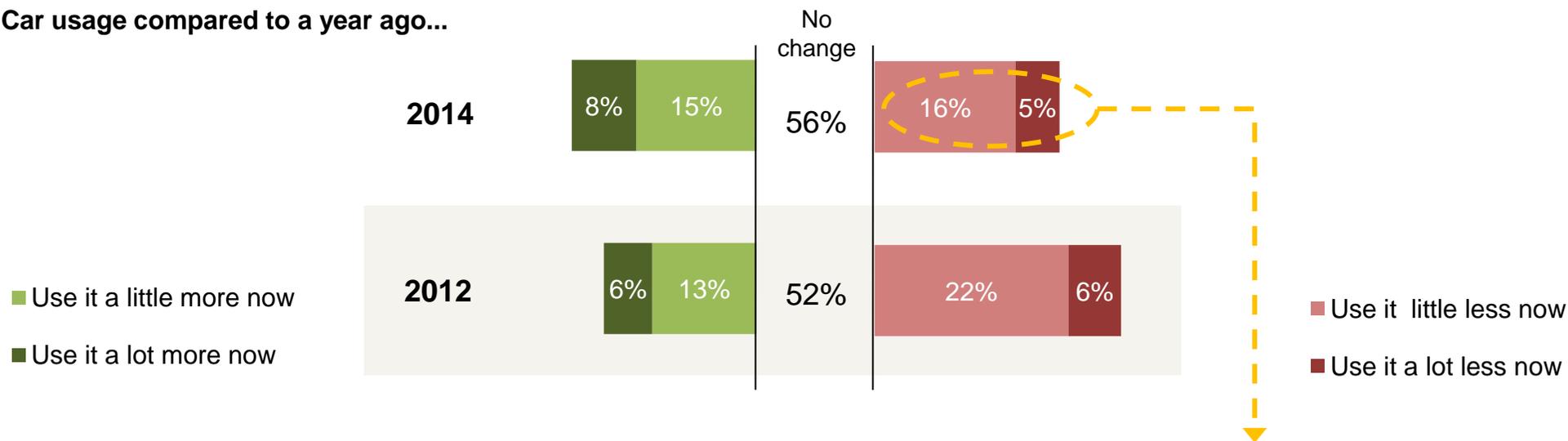
Modes of transport used for different activities.



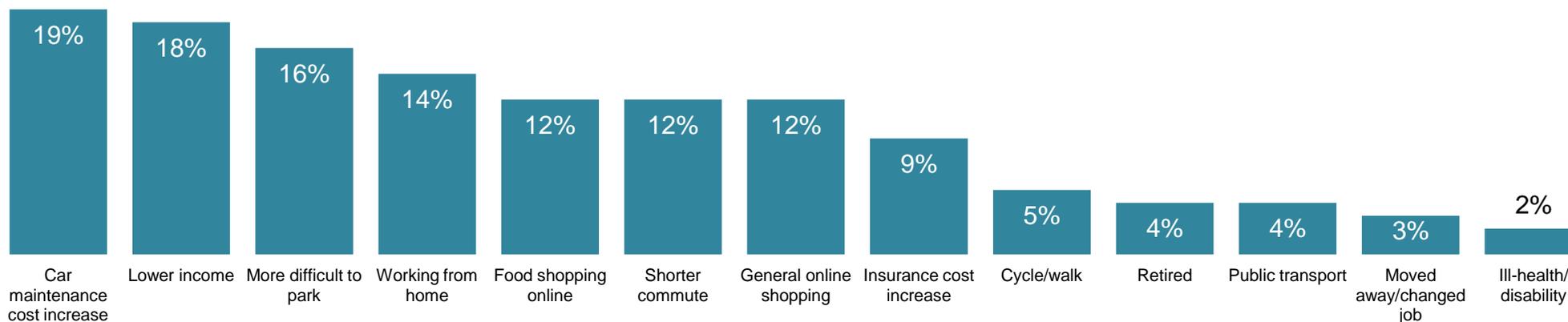
Motor vehicle usage.

Usage of motor vehicles has increased slightly from 2012, motivated mainly by financial reasons.

Car usage compared to a year ago...

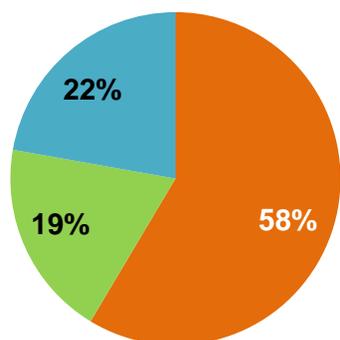


They use their motor vehicle less because...



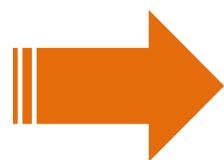
Reasons for not using public transport.

Price is the main reason motorists say they aren't using public transport even though they would like to. The logistics of time and location are also barriers.

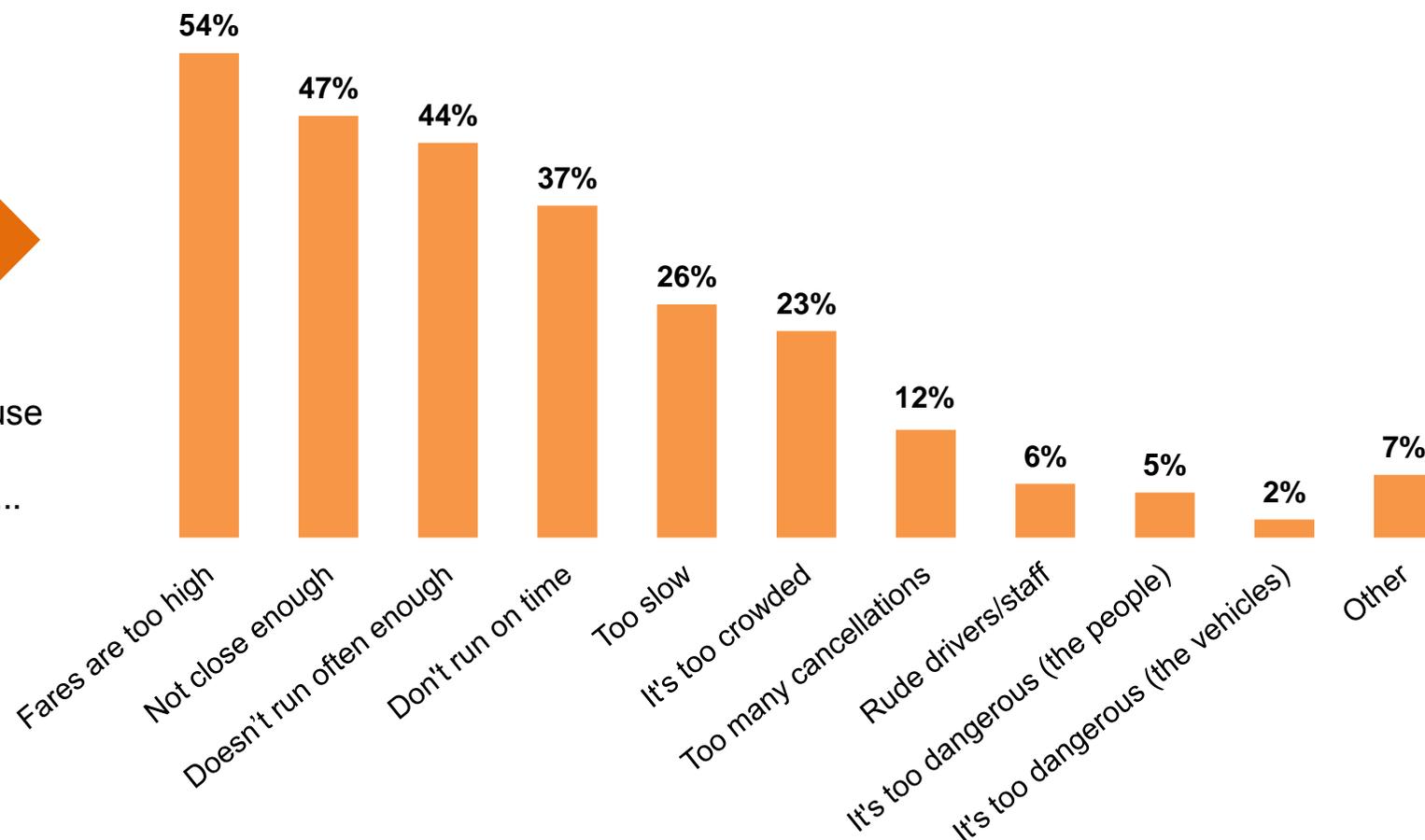


58% agree that they **would drive less if public transport was better**

(22% disagree and 19% aren't sure)



But don't use it more because...





Motoring behaviour.

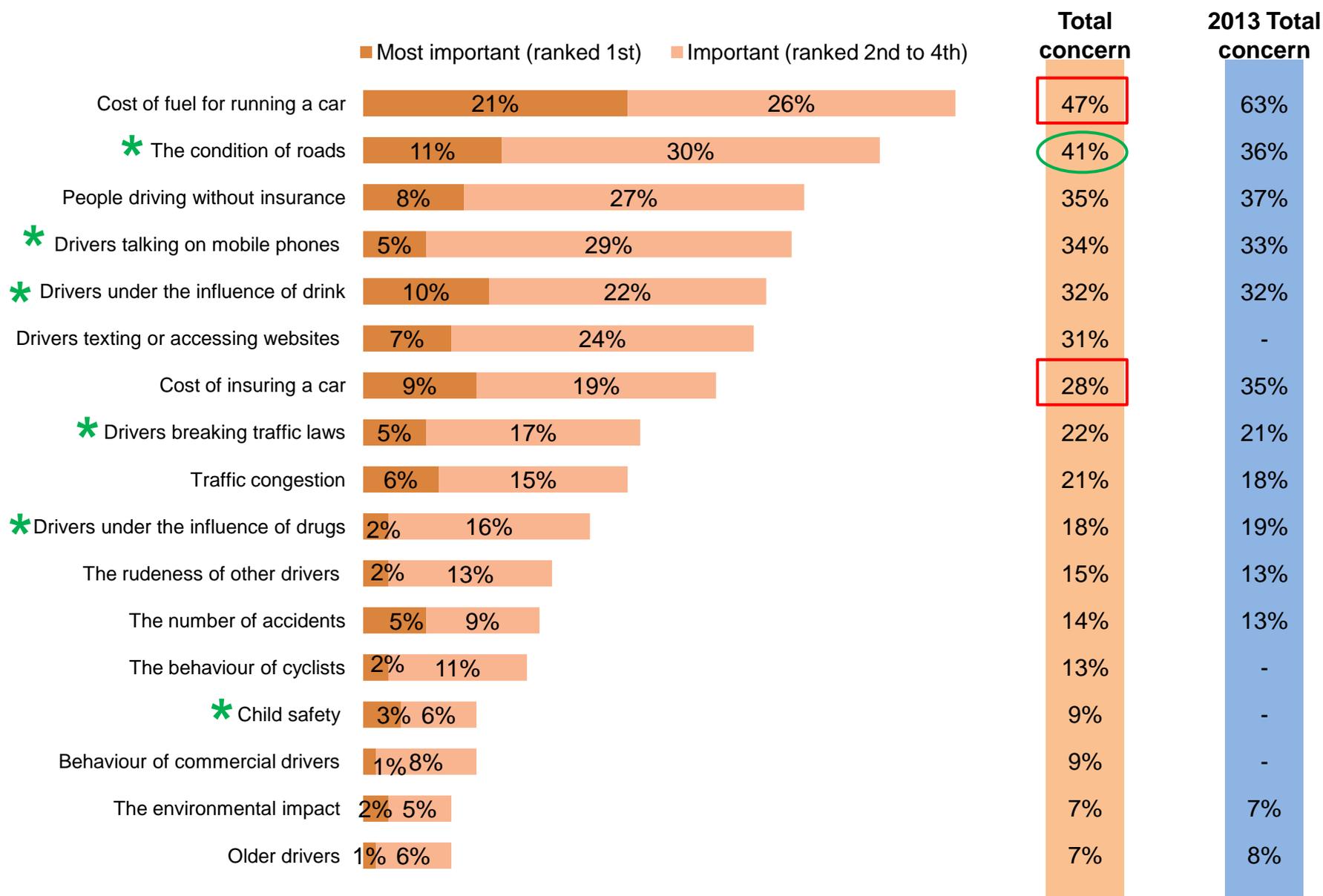
- Multi-modal motorist
- Modes of transportation used
- Activities done for each mode of transportation
- Change in vehicle usage
- Reasons for not using public transport



Motoring issues.

Motorists concerns.

Whilst the cost of fuel is still the top concern, the drop in petrol prices has made 'cost of fuel' less important than last year.



Motoring views.

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

Congestion seems to be getting worse



Motorway journey times are becoming less predictable



If fuel were more affordable I would be able to see more family/friends



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



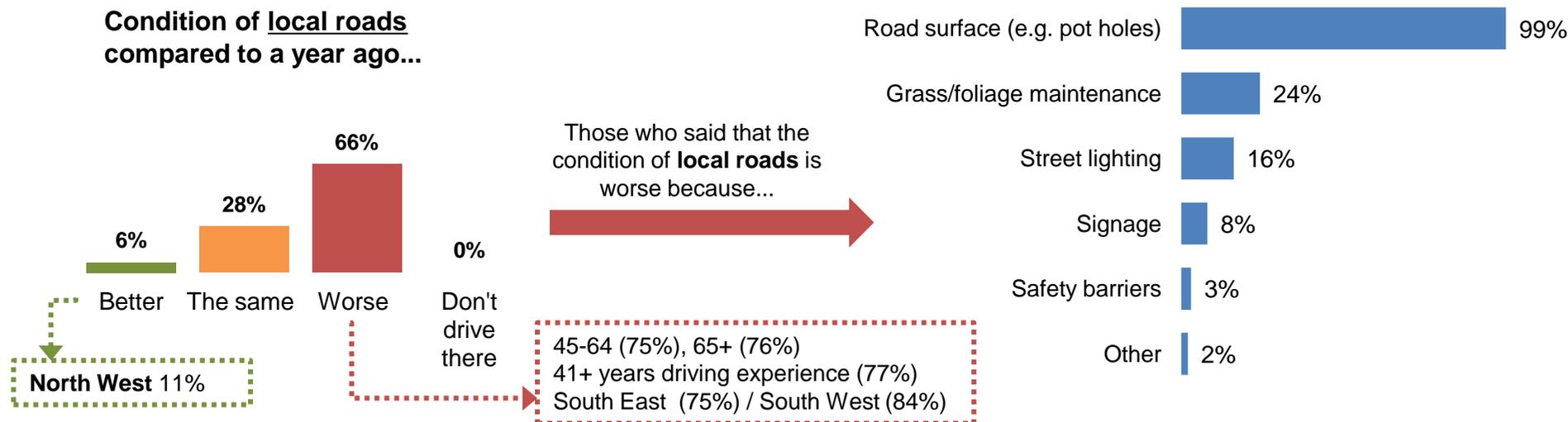
I am confused by the role of the Highway Agency traffic officers



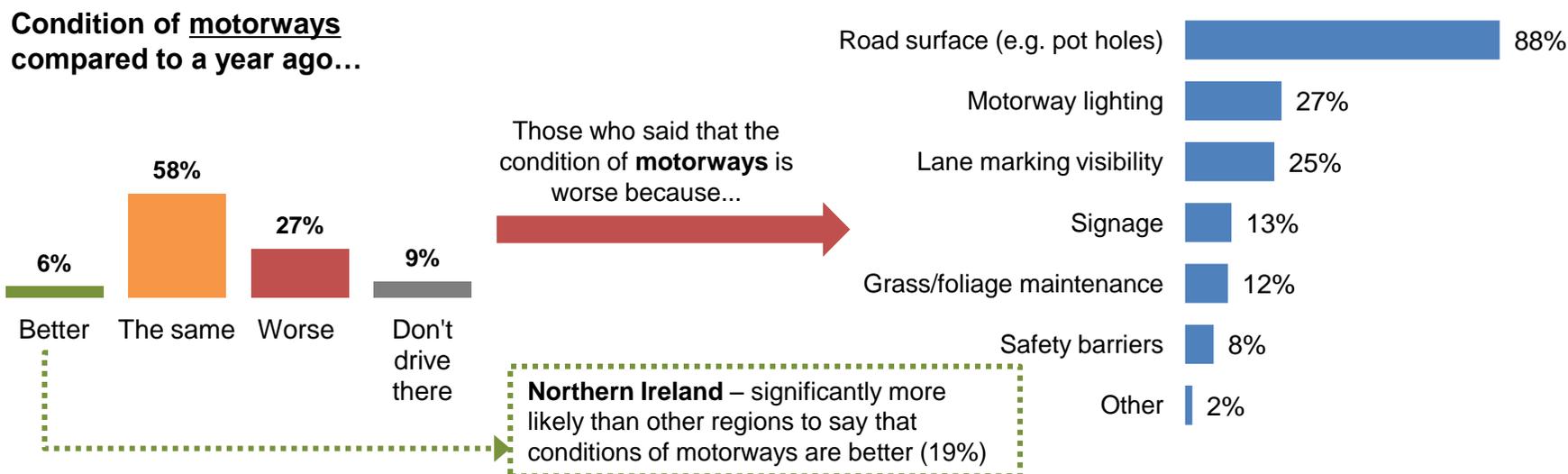
Condition of local roads and motorways.

Motorists feel that while the conditions on motorways have remained the same, maintenance of local roads has been neglected.

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

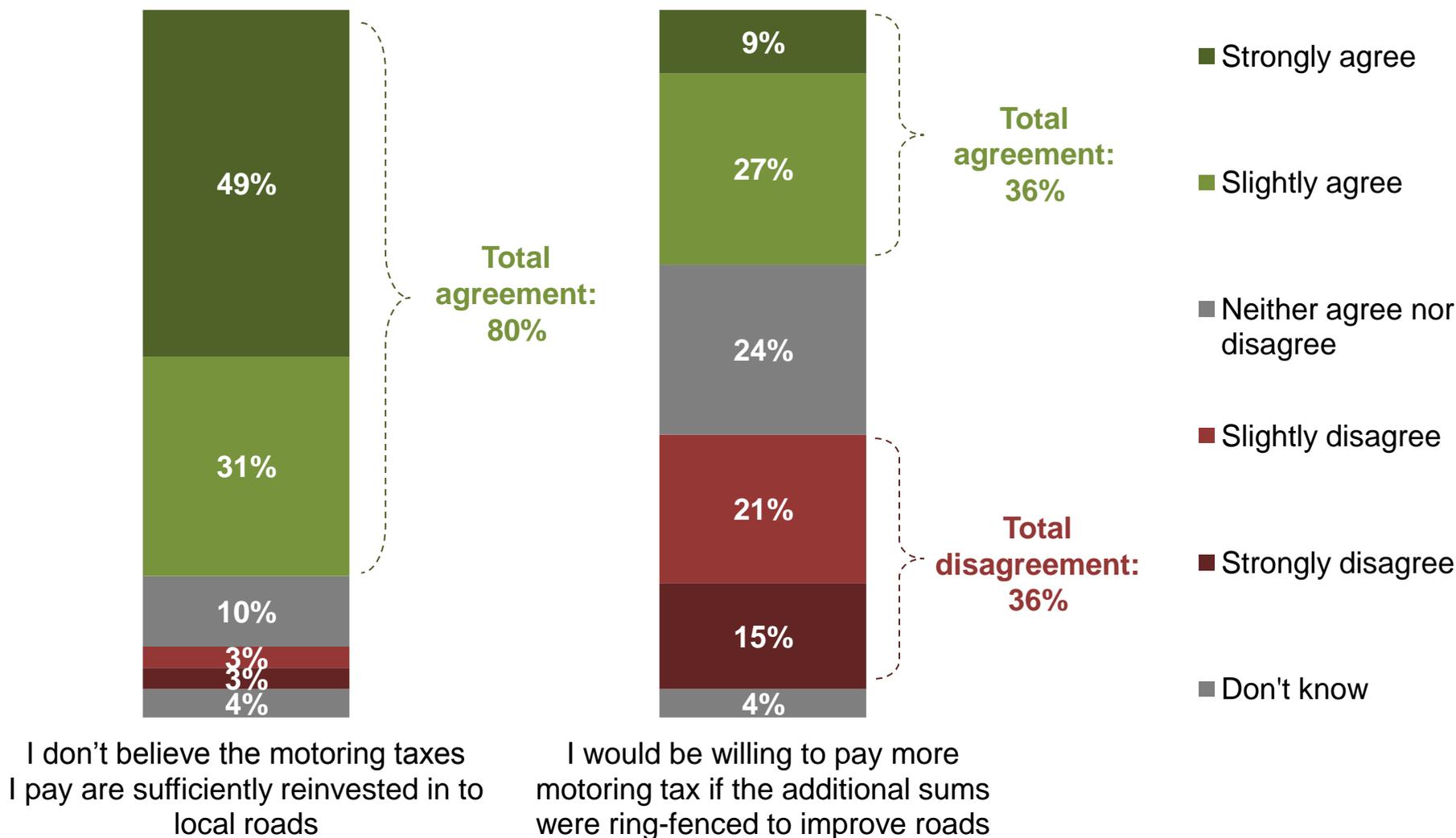


Condition of motorways compared to a year ago...



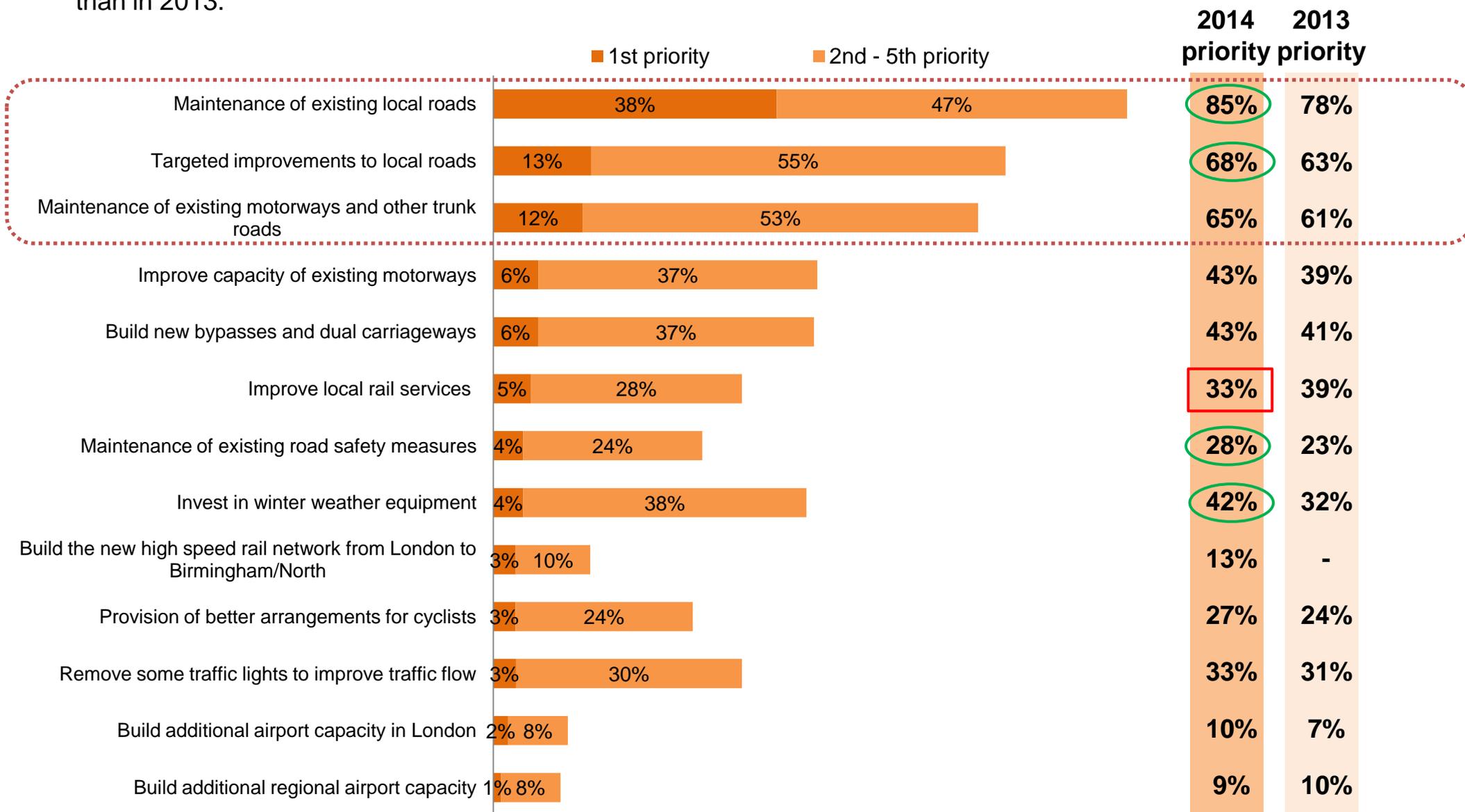
Maintaining roads through taxation.

Most feel that motoring taxes are not supporting maintenance of local roads and one-third would be willing to pay more motoring tax if they knew it would do so.



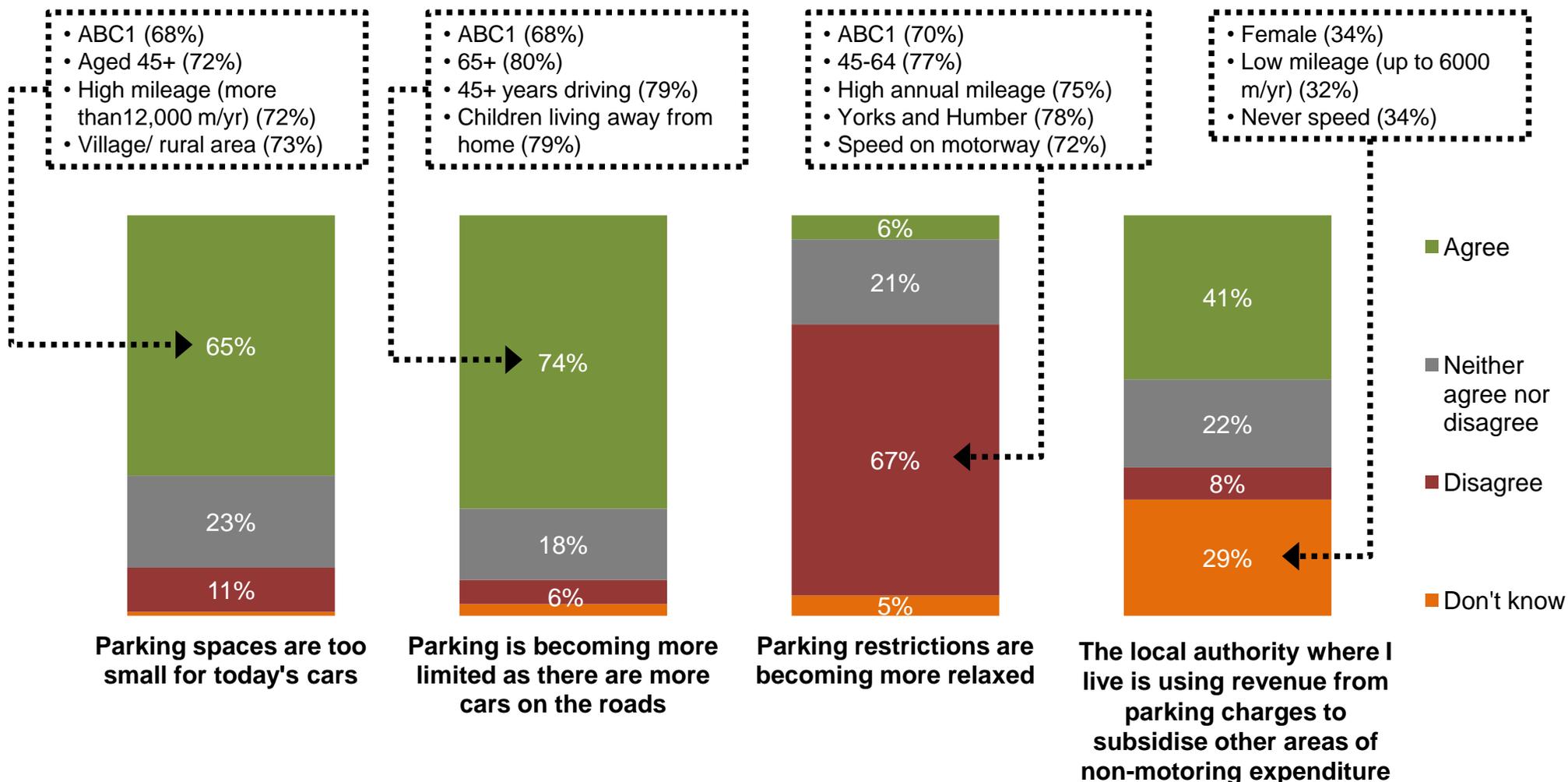
Priorities for transport investment.

Maintenance of roads, particularly local roads are seen as the top priorities for investment – significantly more than in 2013.



Views on parking.

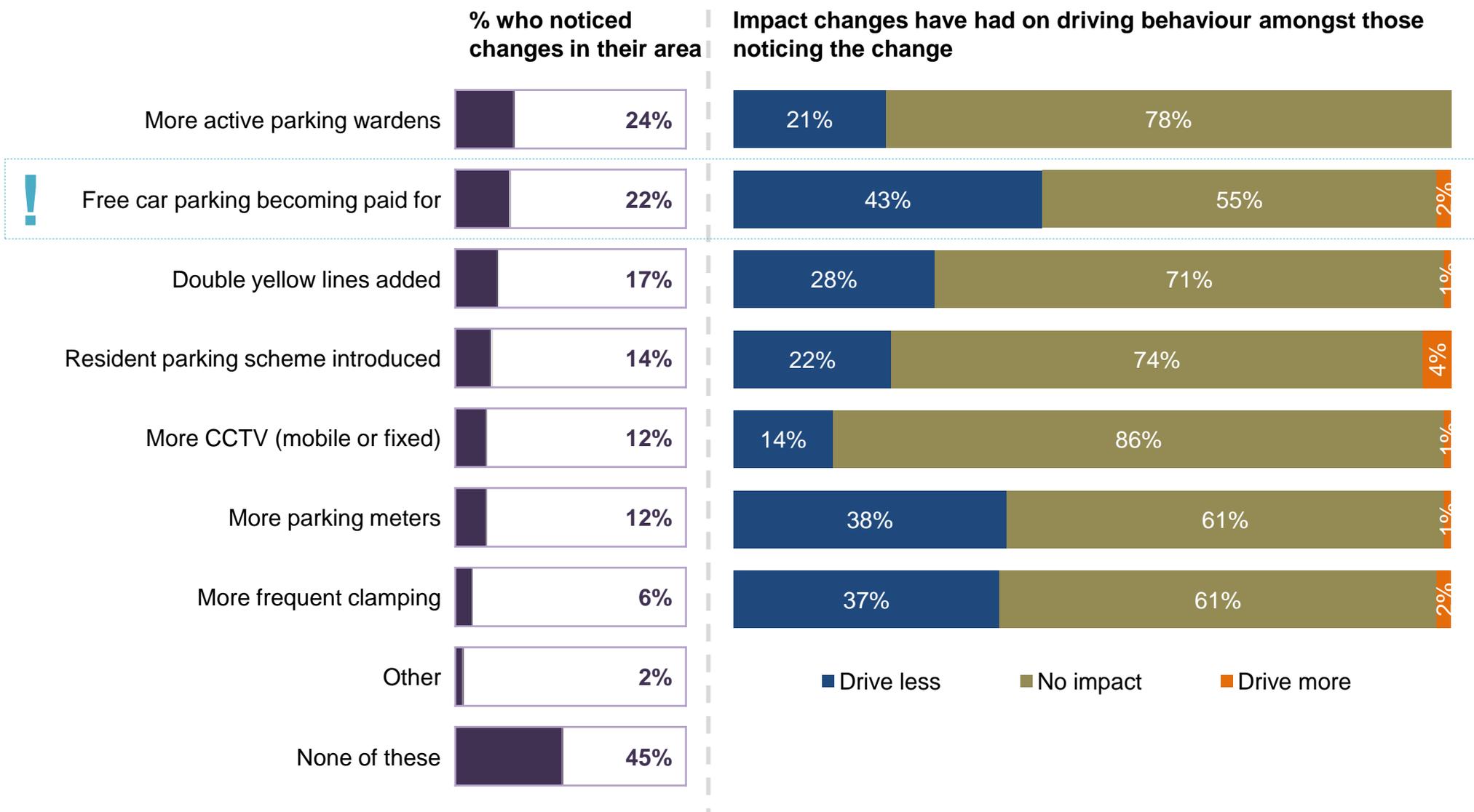
Motorists feel that parking is becoming more restricted as time goes on. Many are unsure about how local authorities use the money acquired as a results of parking fines and fees. Those that do tend to be older, more experienced drivers.



N.B. More statistical differences available in the notes section of the PPT slide.

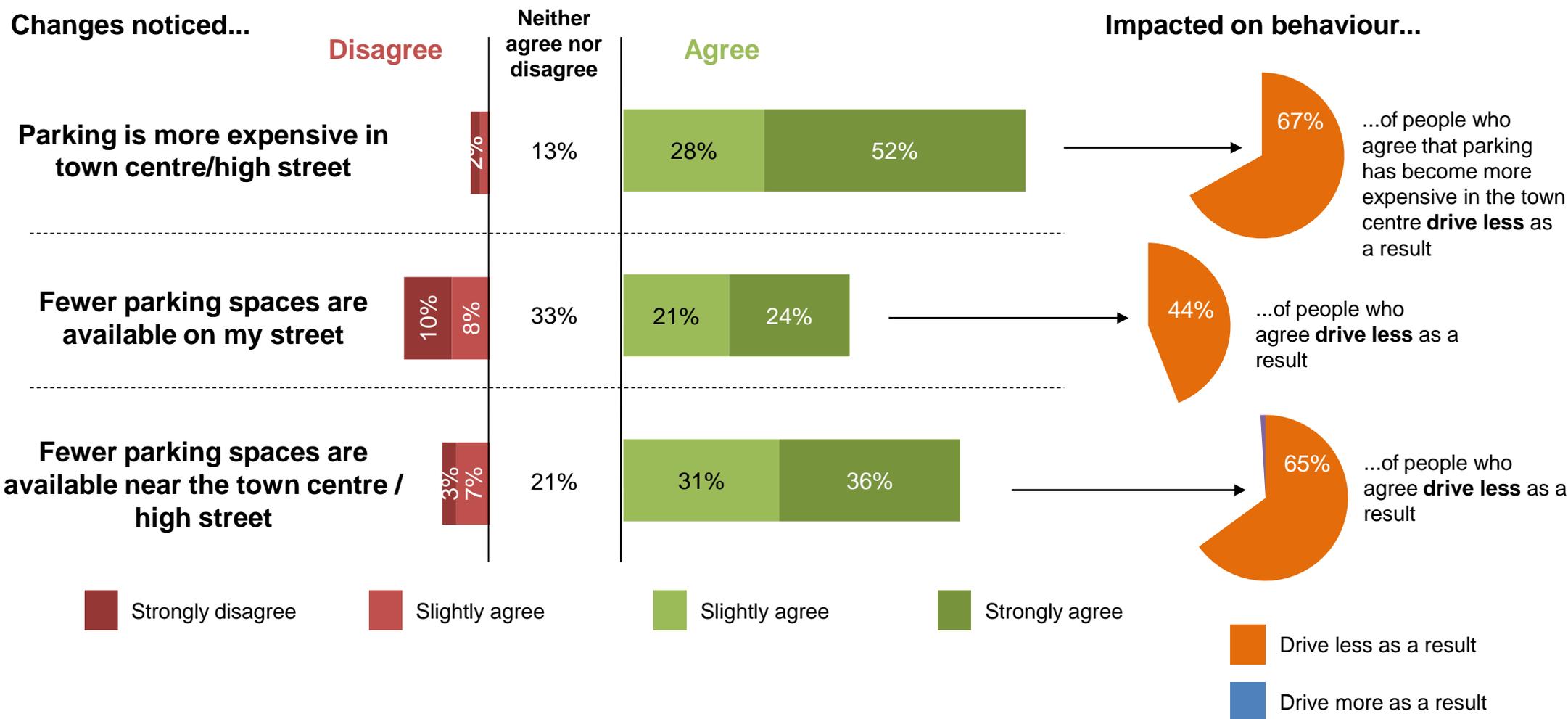
Impact of changes to parking.

Free car parking becoming paid for is something motorists are significantly more likely to notice as well as be affected by – it is the financial impact that makes it an issue.



Impact of changes to parking regulations.

Significantly more people agree than disagree that a number of changes have been introduced to parking in their area, all of which had a perceived impact on how much they drive (they are driving less as a result). The only change motorists are less likely to have experienced is the reduction in the number of parking spaces in their area.





Motoring issues.

- Motorists concerns
- Condition of roads & taxation
- Priorities for investment
- Views on parking
- Perceived changes in parking
- Impact of parking changes



Technology & safety.

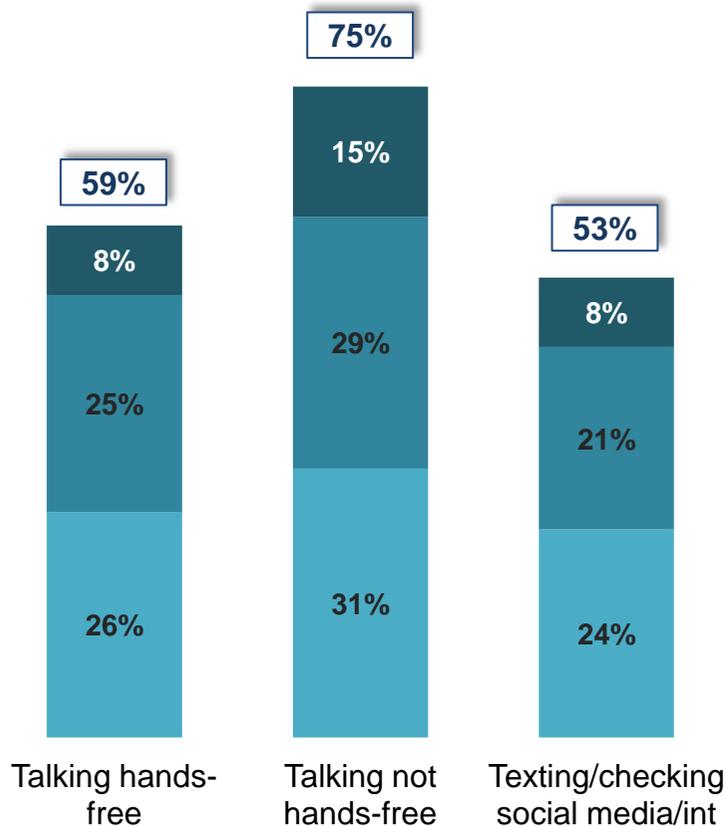
Phone usage on the roads.

34% say mobile phone usage is a top motoring concern

51% of men keep their phone in their pocket whilst driving whilst 56% of women keep it in their bag. 19% of both men & women keep their phone next to them

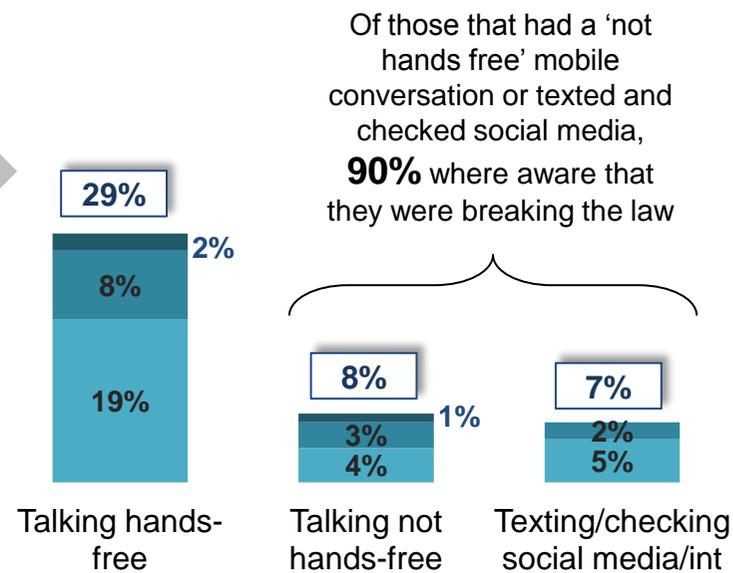
15% connect the phone via Bluetooth (22% of men, 45% of company car owners)

How often do you see other people....



- During every journey
- During most journeys
- During some/about half of my journeys

How often do you



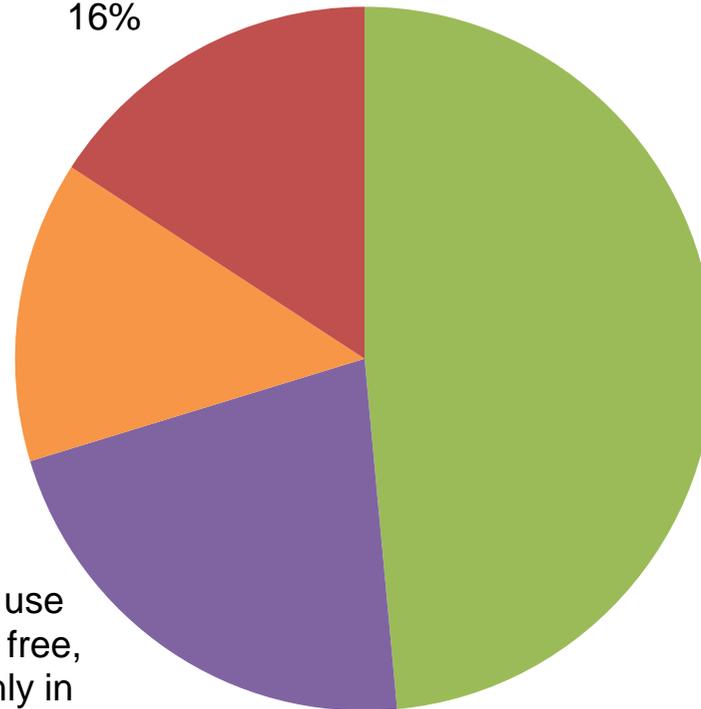
Company policy regarding mobile phone use.

Most drivers with a company car say their company has a policy about mobile phone usage whilst driving, with almost half saying their company requires them to use hands free while in the car.



Aren't allowed
to take calls
while in the
car
14%

No policy
16%



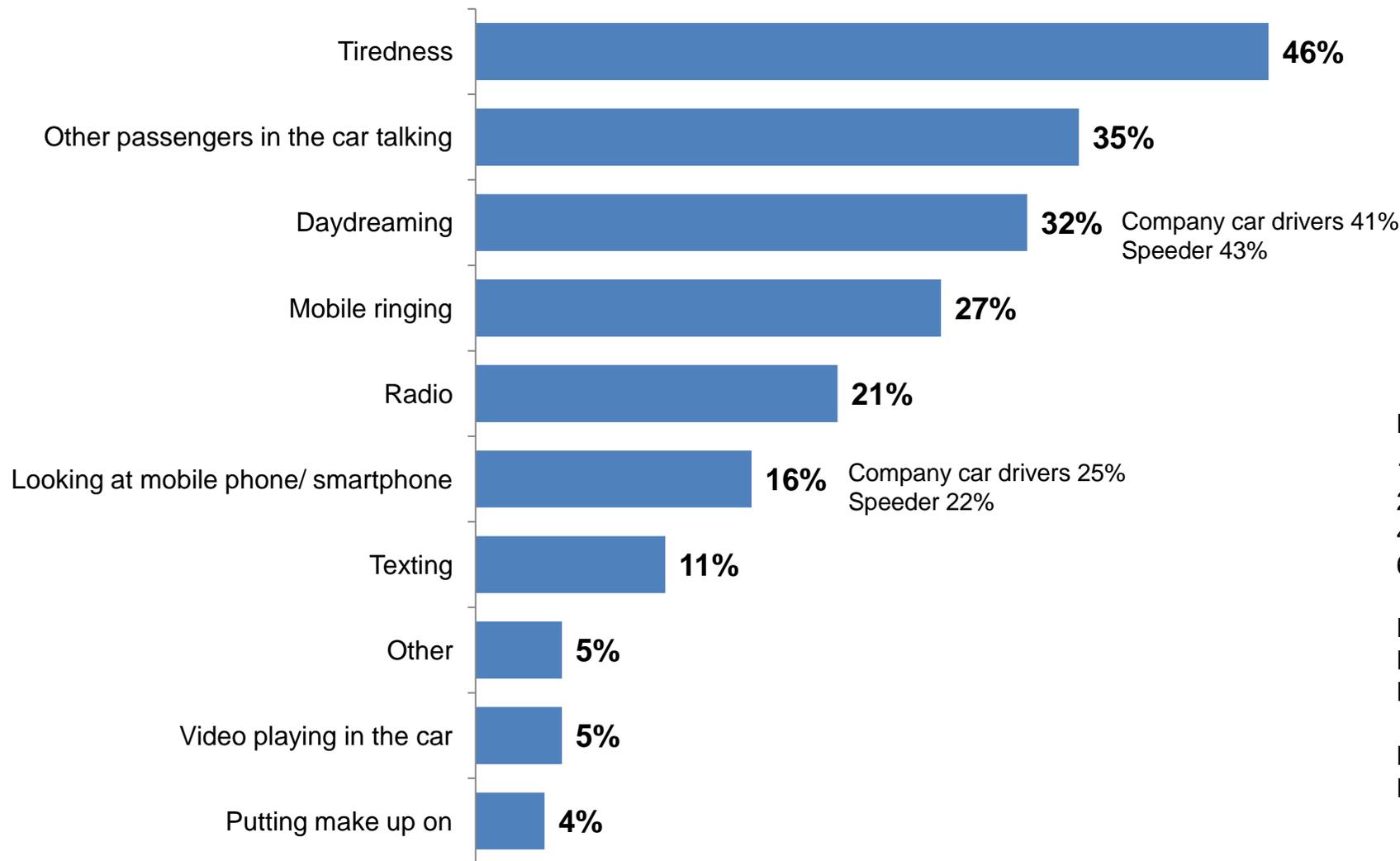
Must use
hands free,
but only in
some
situations
22%

Must use
hands free
49%



Distractions whilst driving.

Technology is not the main distraction whilst driving, more it is 'traditional' elements of tiredness, passengers and daydreaming.



36% of motorists say that they do not get distracted when driving

Don't get distracted:

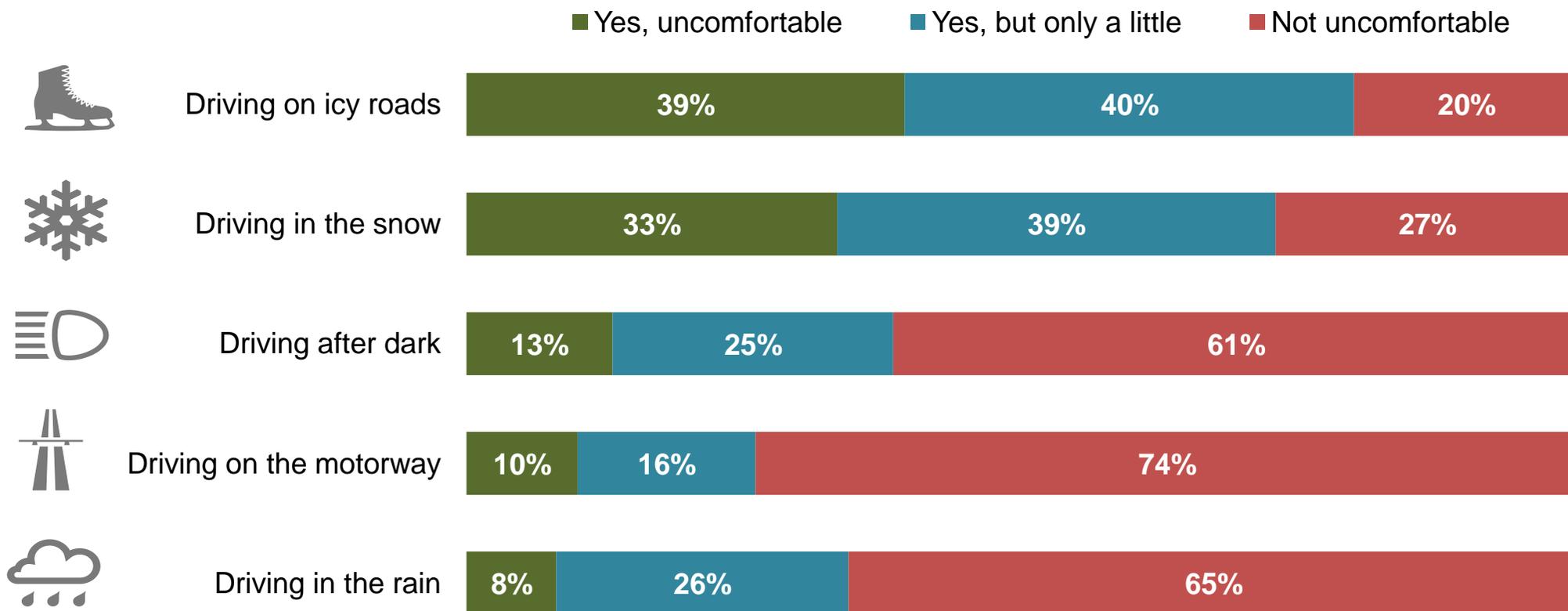
17-24	18%
25-44	28%
45-64	39%
65+	58%

Kids at home	30%
Kids not home	52%
No kids	29%

Motorway speeder	28%
Never speed	46%

Uncomfortable driving situations.

Motorists are most uncomfortable driving on ice and snow.

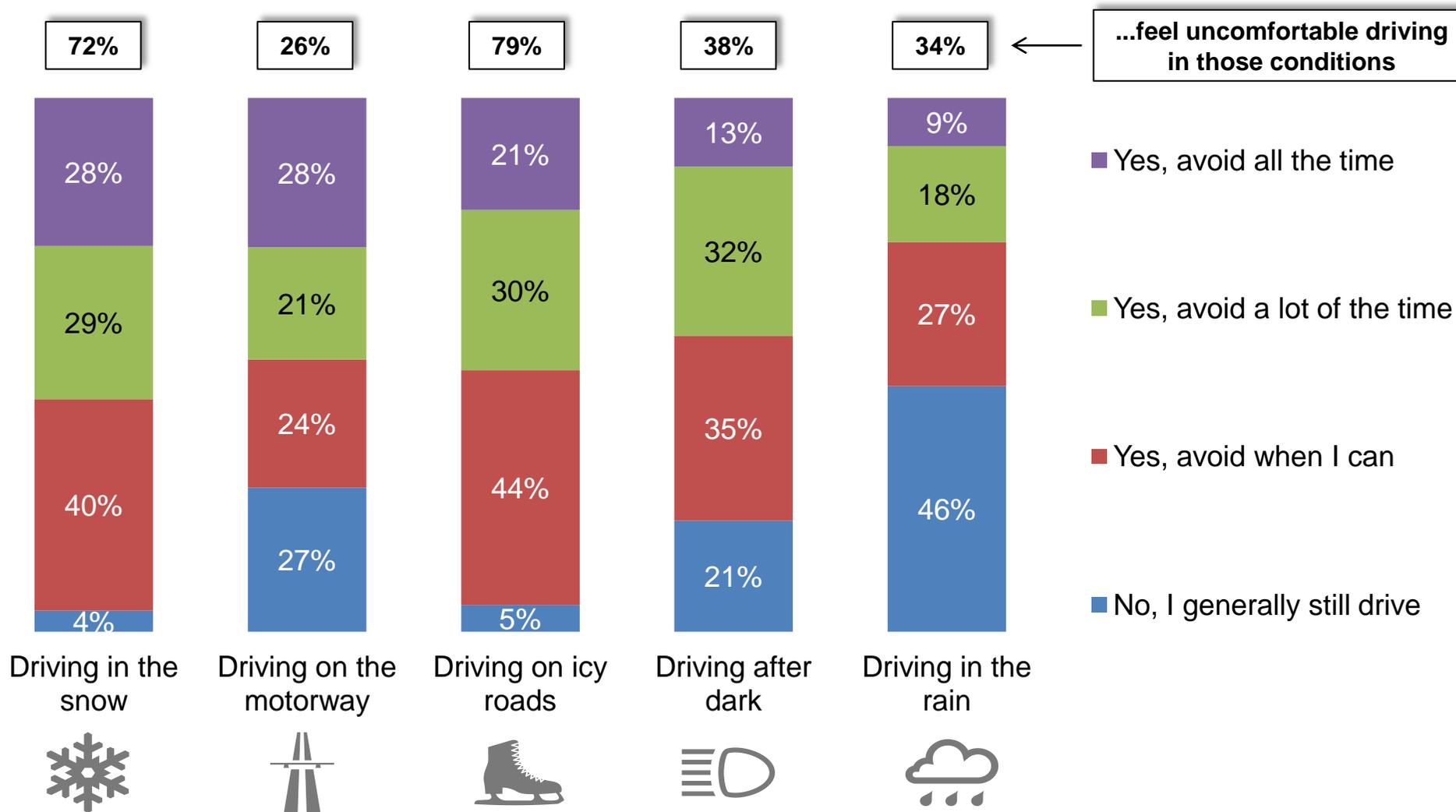


17-24 year olds are the most uncomfortable across all driving conditions
65+ are the next most uncomfortable

C2DE's are more likely to be at least a little uncomfortable driving in the dark, snow or on the motorway

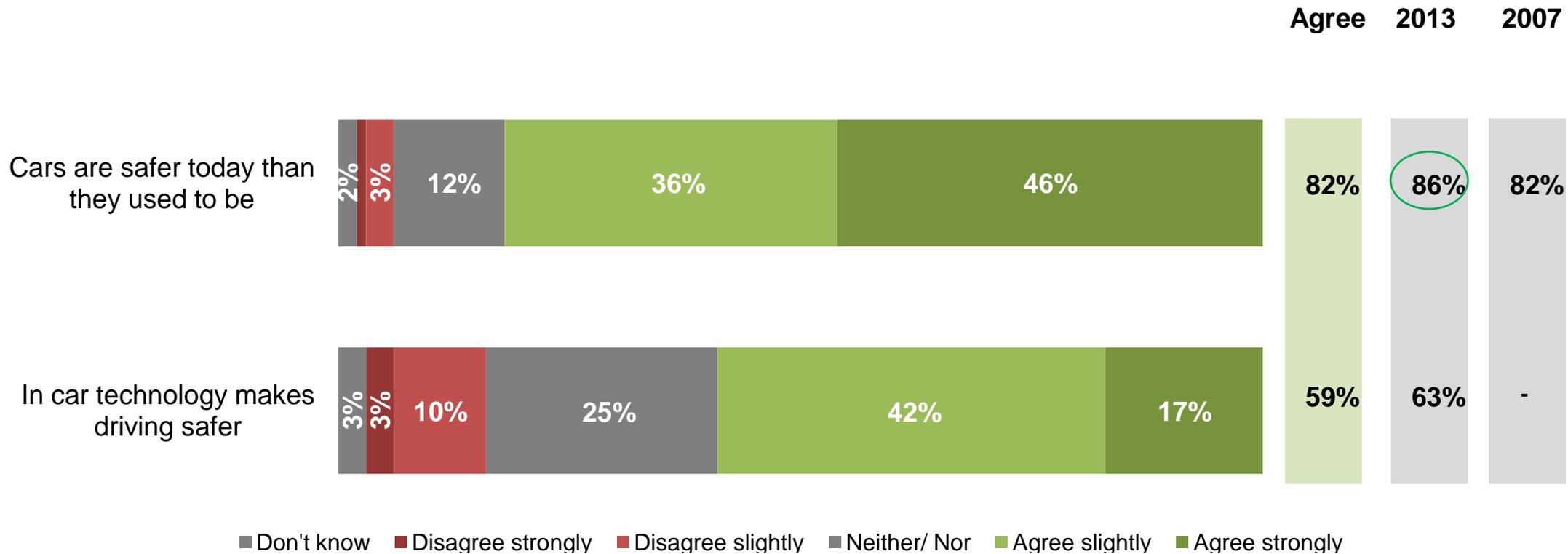
Avoiding uncomfortable driving situations.

Motorists tends to drive in the rain even though they may be uncomfortable with it, they will, however, actively avoid ice and snow.



Improvements in road safety.

There is near universal agreement that cars are safer now than ever before, but the drivers themselves are not seen in the same positive light.



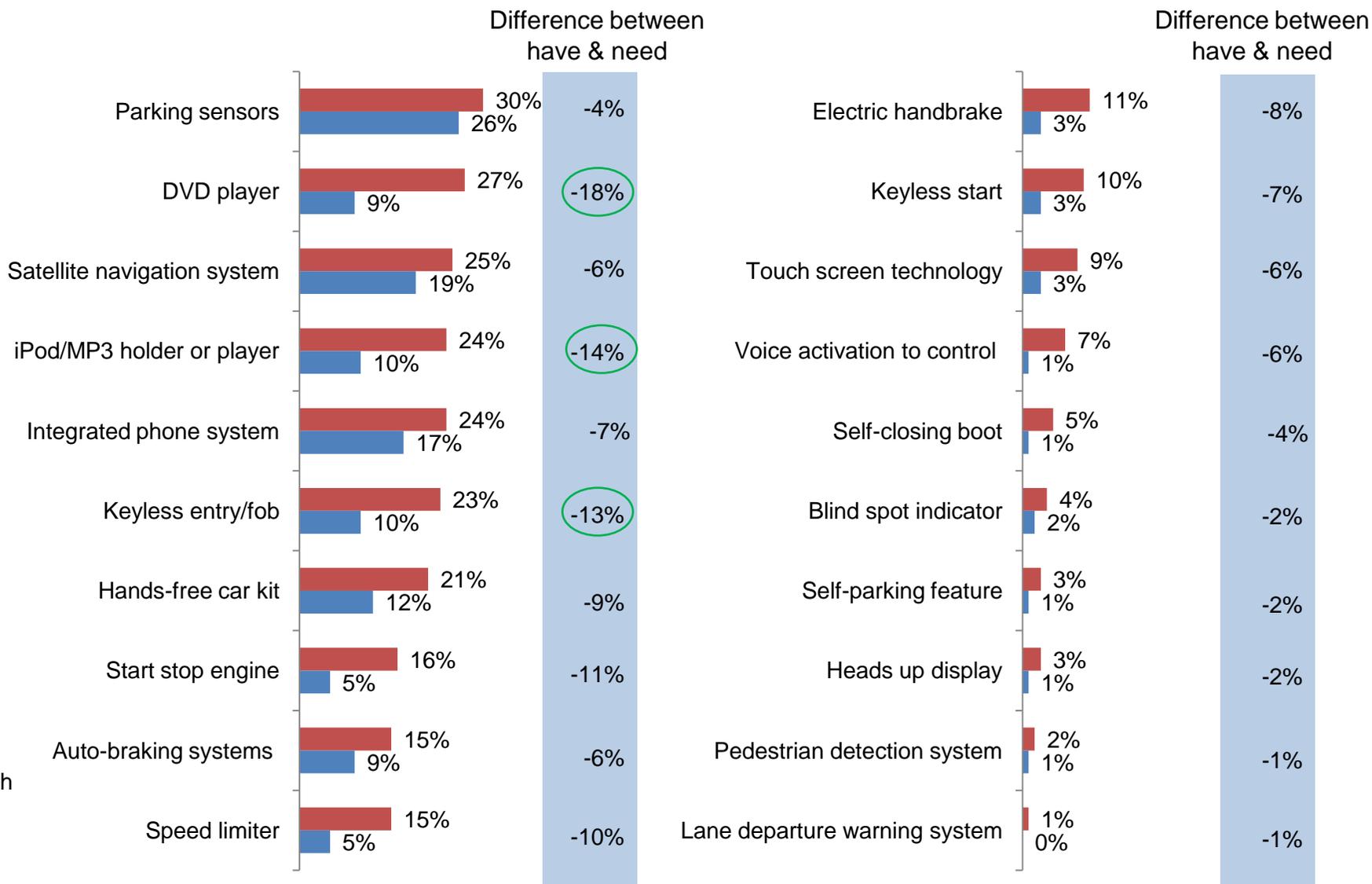
In-car technology & must haves for next time.

DVD players and iPod connections are the features that many have currently, but don't require in their next vehicle. In contrast, many have parking sensors and can't imagine their next car without them.

29%
don't currently have tech features in their vehicle

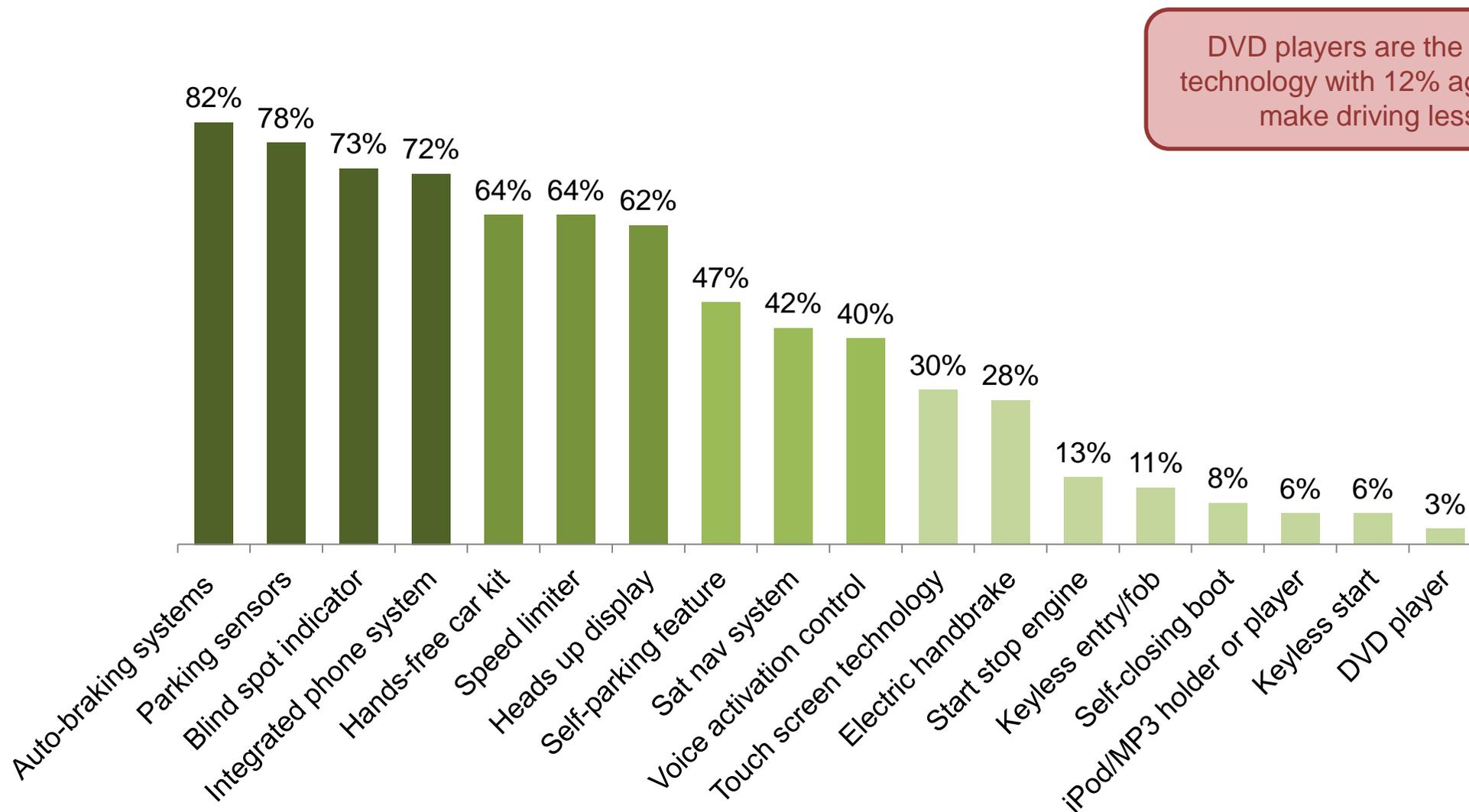
33%
of those with tech feel they don't need it in their next vehicle

Currently have tech
Want next time



In-car technology making driving safer.

Sensors and phone accessories are technologies that are perceived to making driving more safe.





Technology & safety.

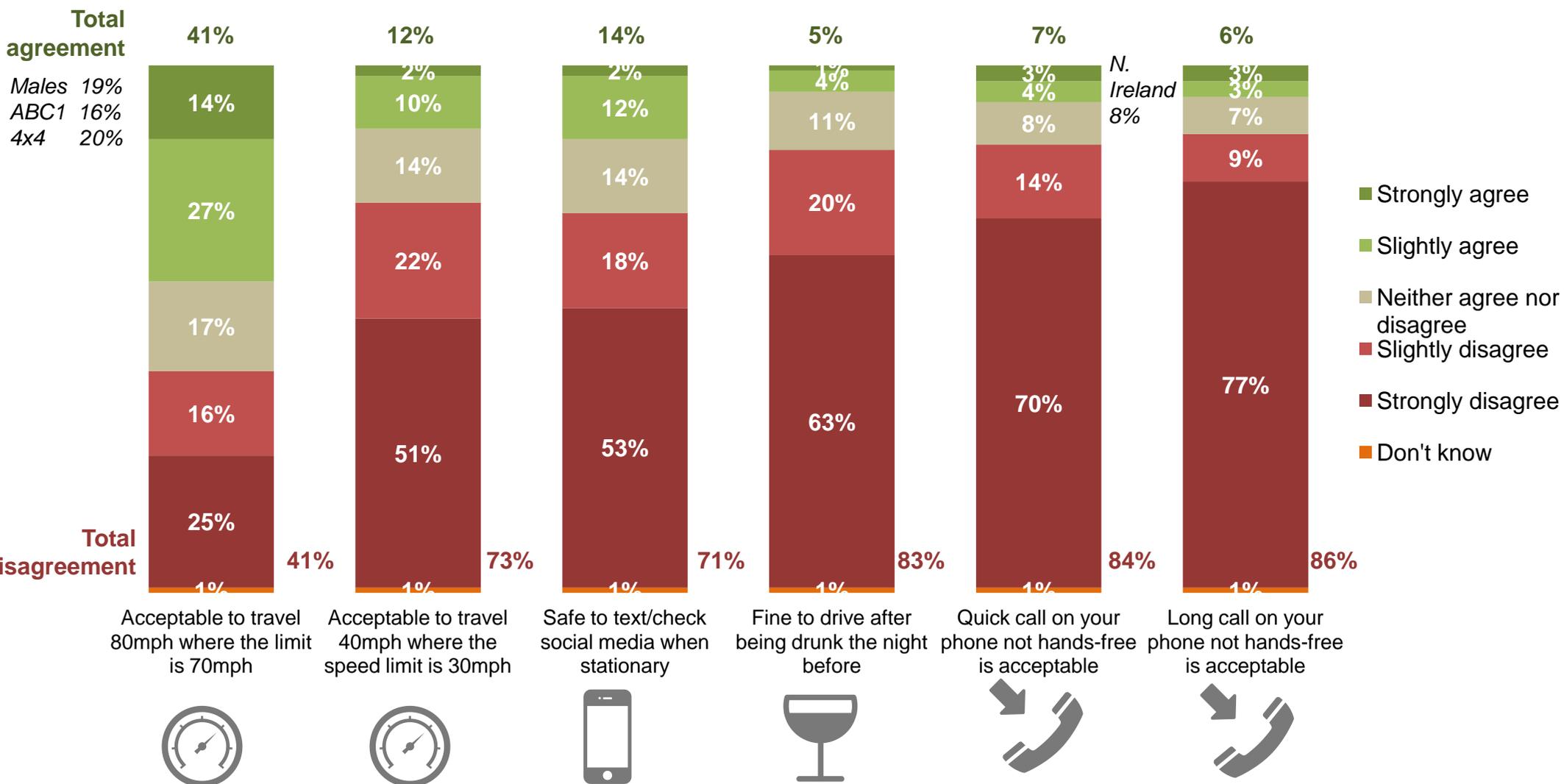
- Mobile phone usage
- Company policies
- Driving distractions
- Comfort level of driving in different conditions
- Change in behaviour in different conditions
- In-car technology
- Perceived safety of in-car technology



Highway code and the law.

Acceptability of 'grey area' behaviour.

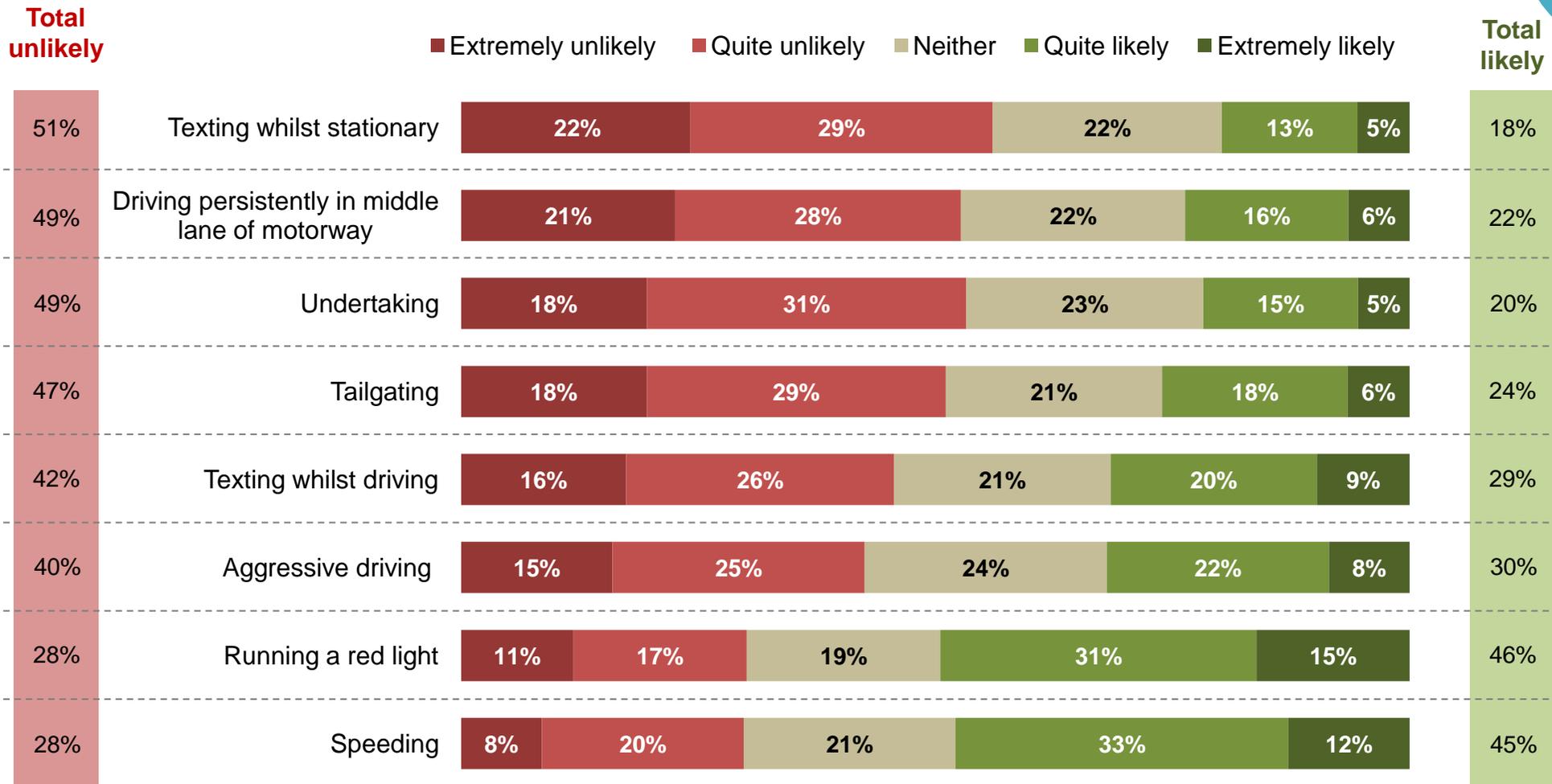
There is strong agreement that talking on a mobile phone with hands is not acceptable but slightly less strength of conviction for using a phone whilst stationary for texting and social media.



Likelihood of getting caught for offences.

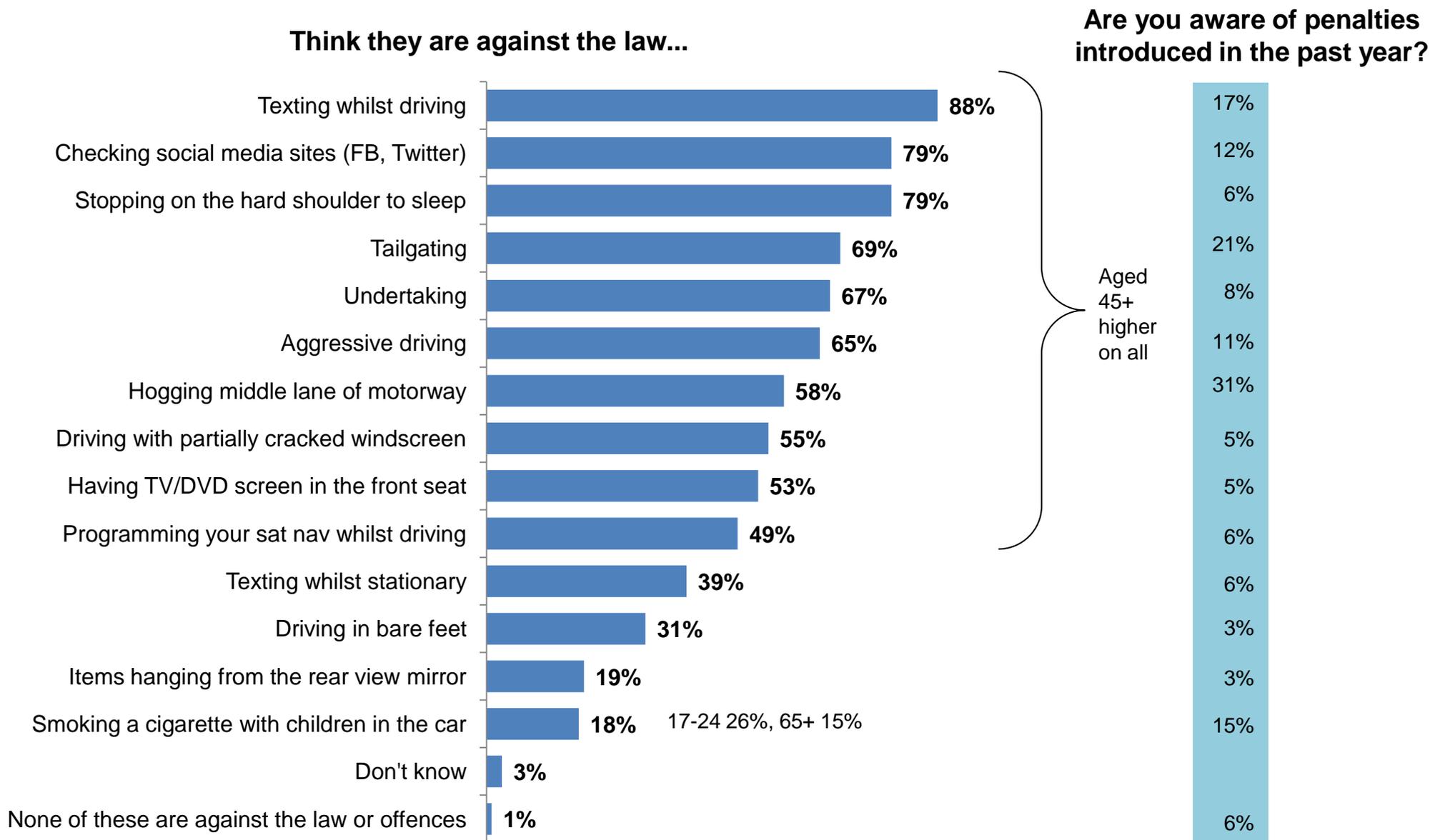
Overall motorists feel they will not get for many motoring offences. Running red lights and speeding, which can be caught via cameras, are where consumers are most likely to feel they are most likely to get caught.

Overall 24% thought they were likely to get caught for motoring offences



Speeders are only slightly more likely to think they won't get caught 32%

Understanding of motoring offences.

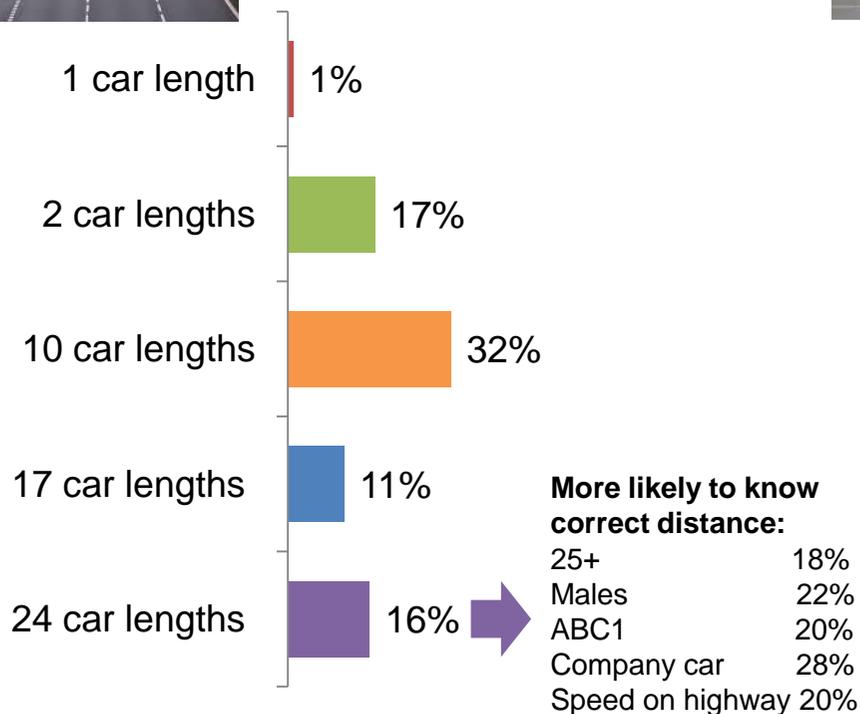


Knowledge of stopping distances.

Few know the correct distance that will allow them to stop safely, with the majority underestimating the distance needed.



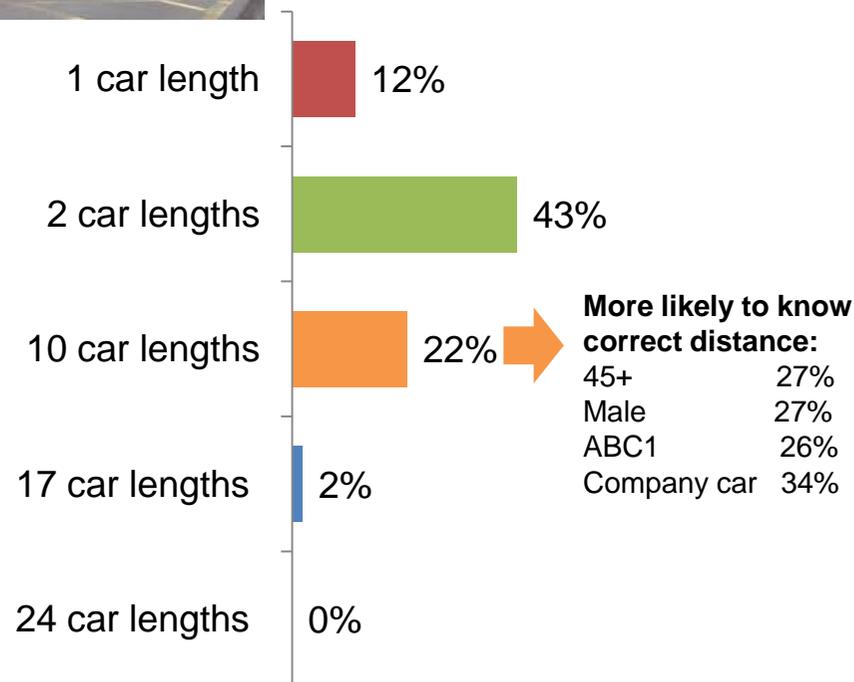
On the motorway with 70mph speed limit



Recommended stopping distance: 24 car lengths



On an urban road with 30mph speed limit



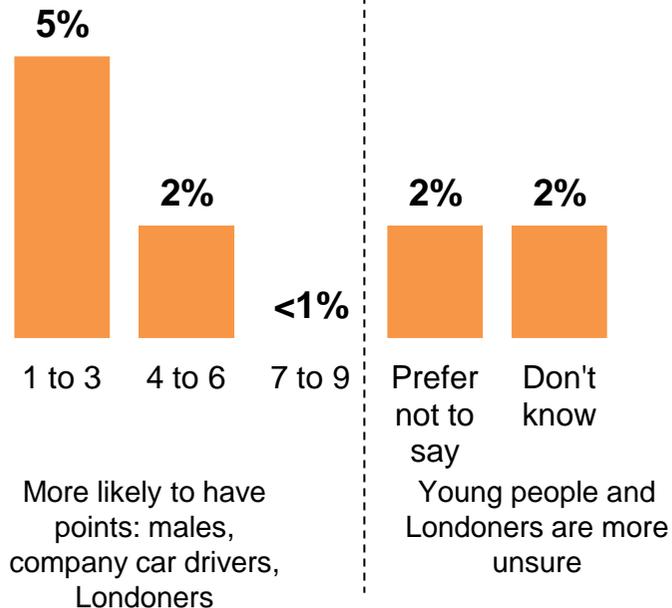
Recommended stopping distance: 10 car lengths

Infringements.

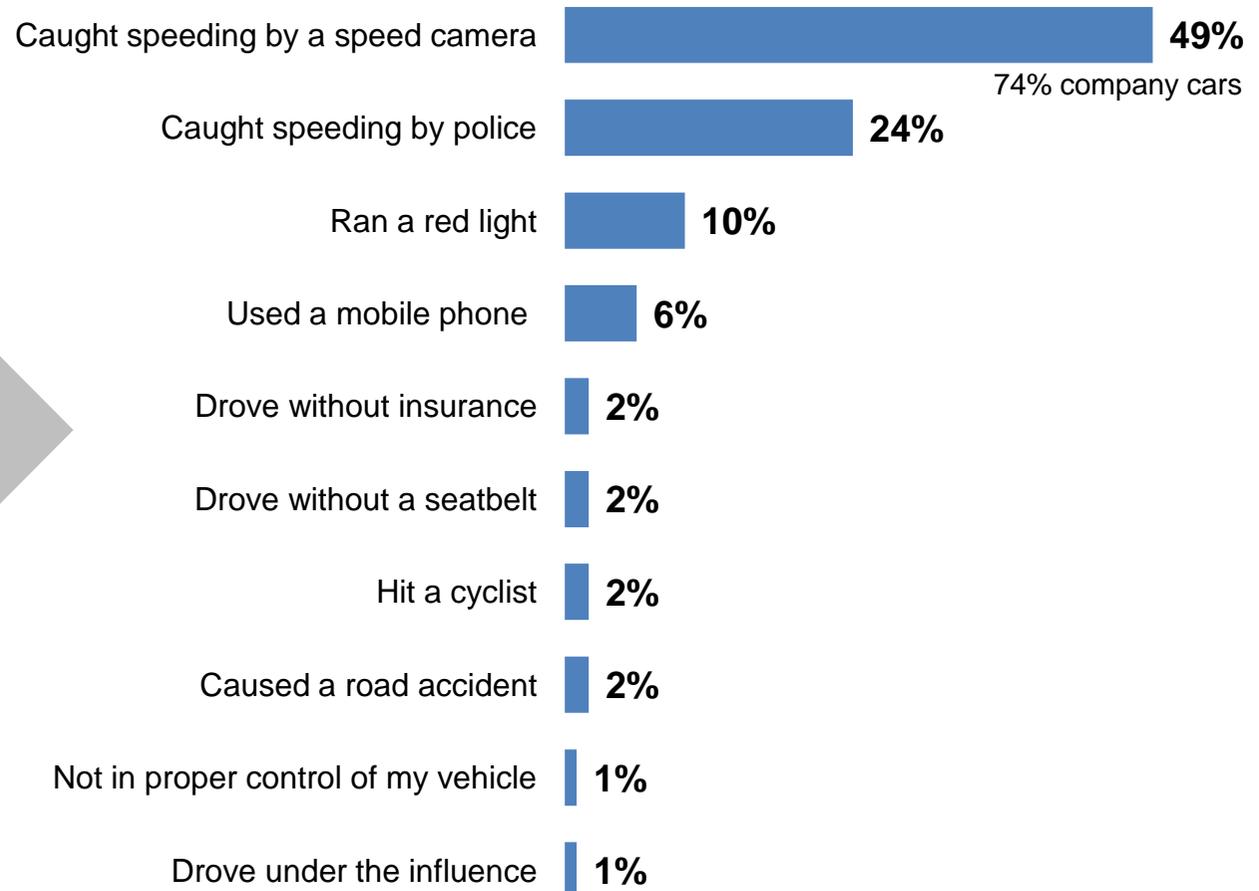
The majority of motorists do not have any points on their licence. For those that do, speeding is the number one cause.

90% don't have points on their licence

Those with points on licence...

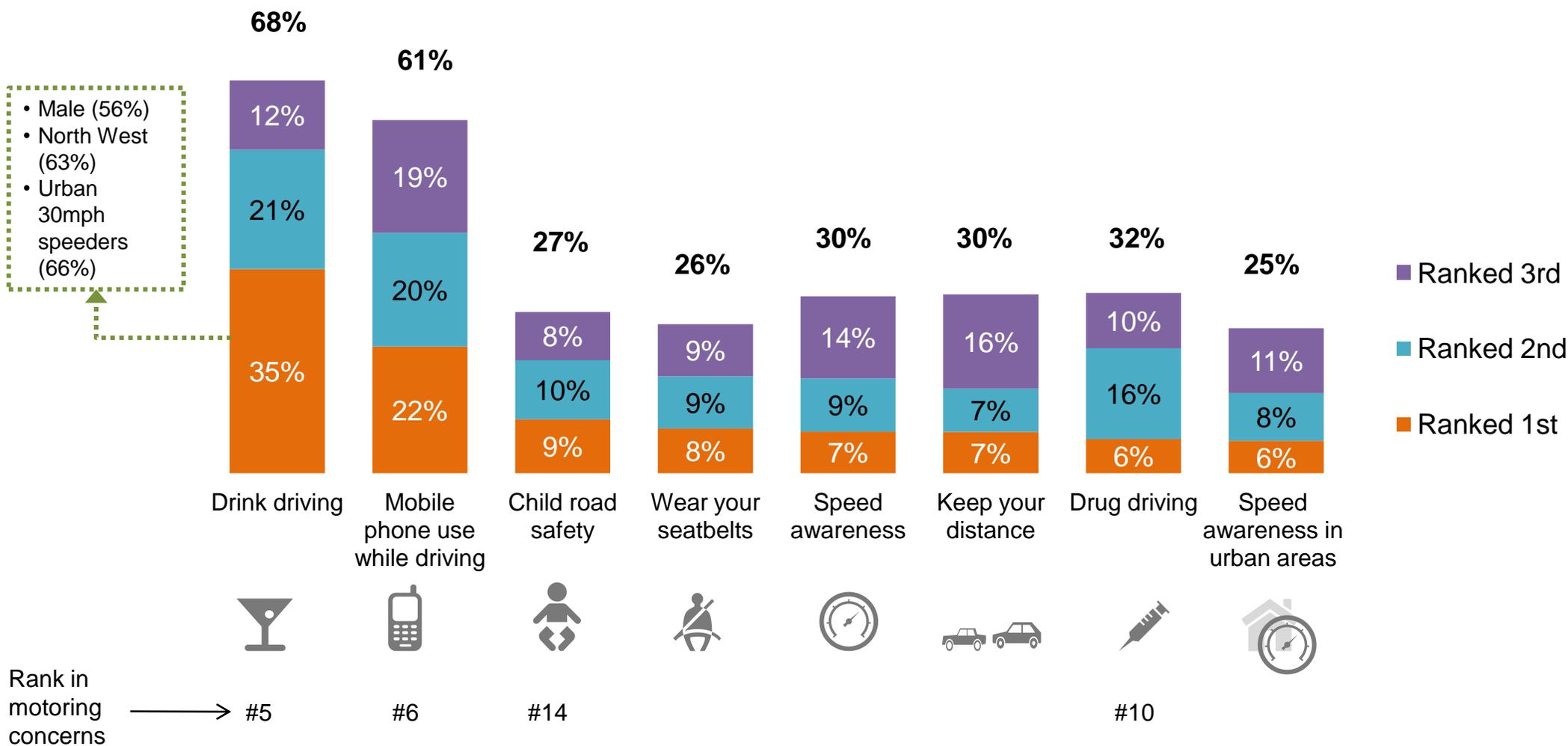


How motorists acquired their points...



Government campaigns.

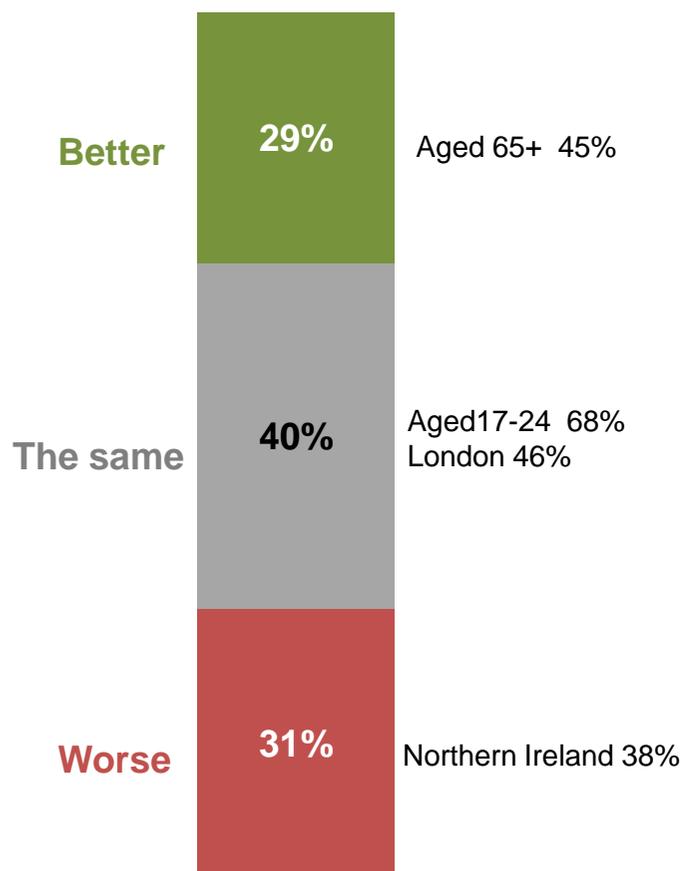
Motorists feel that a campaign warning against drink driving should be a priority for the government, along with other campaigns focusing on safer driving.



Child safety on today's roads.

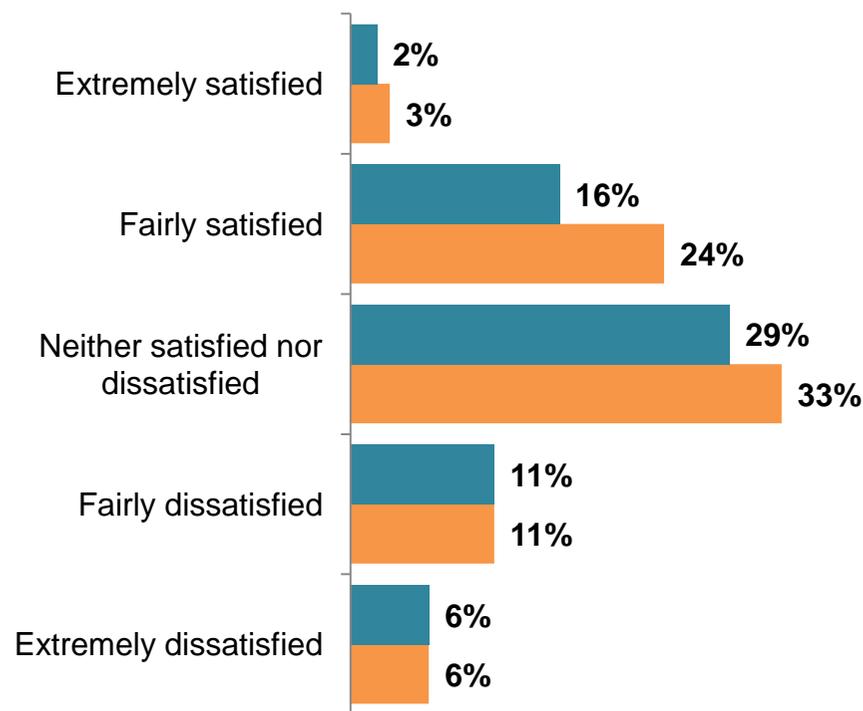
The majority feel children are as safe, or safer than when they were children on the roads. Of those with an opinion, more are satisfied with the level of education in today's schools than dissatisfied.

The current level of child safety on today's roads, compared to when I was a child is...



No difference by those with children at home

Satisfaction with child road safety education in primary and secondary schools

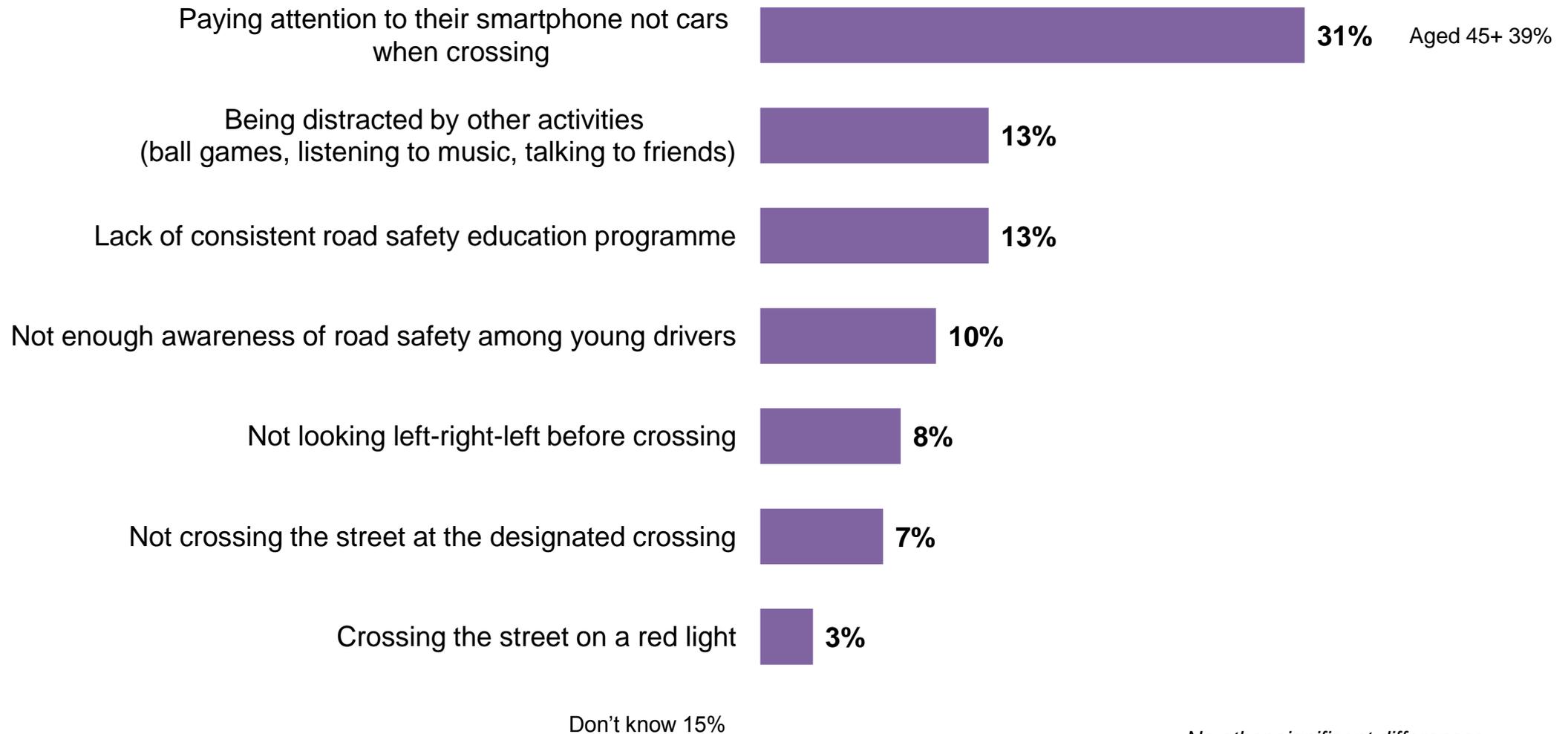


36% don't have an opinion, including 23% of parents

Total
Parents with kids at home

Child safety most need of addressing.

Modern distractions such as smartphones are seen as the main issue that needs to be addressed but 'traditional' elements such as playing and talking are also seen as elements to improve safety for children.



No other significant differences



Highway code and the law.

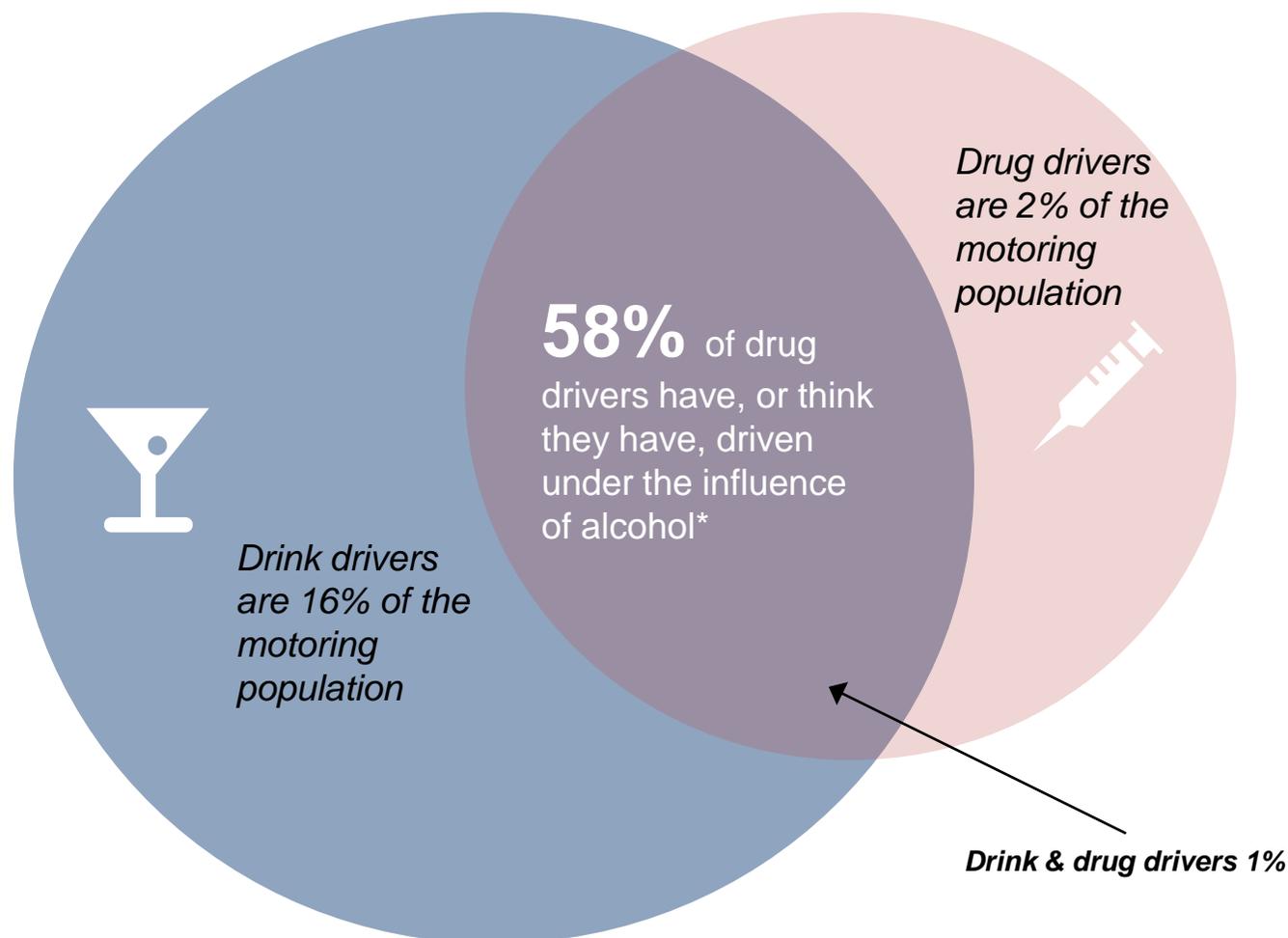
- Acceptability of 'grey behaviour'
- Likelihood of getting caught
- Understanding of offences
- Stopping distances
- Points on licence
- Child safety
- Government campaigns



Driving under the influence.

Drug drivers are likely to be drink drivers.

The prevalence of drink driving is low amongst motorists, and drug driving even lower. However, if you are a drug driver you are also likely to be a drink driver.

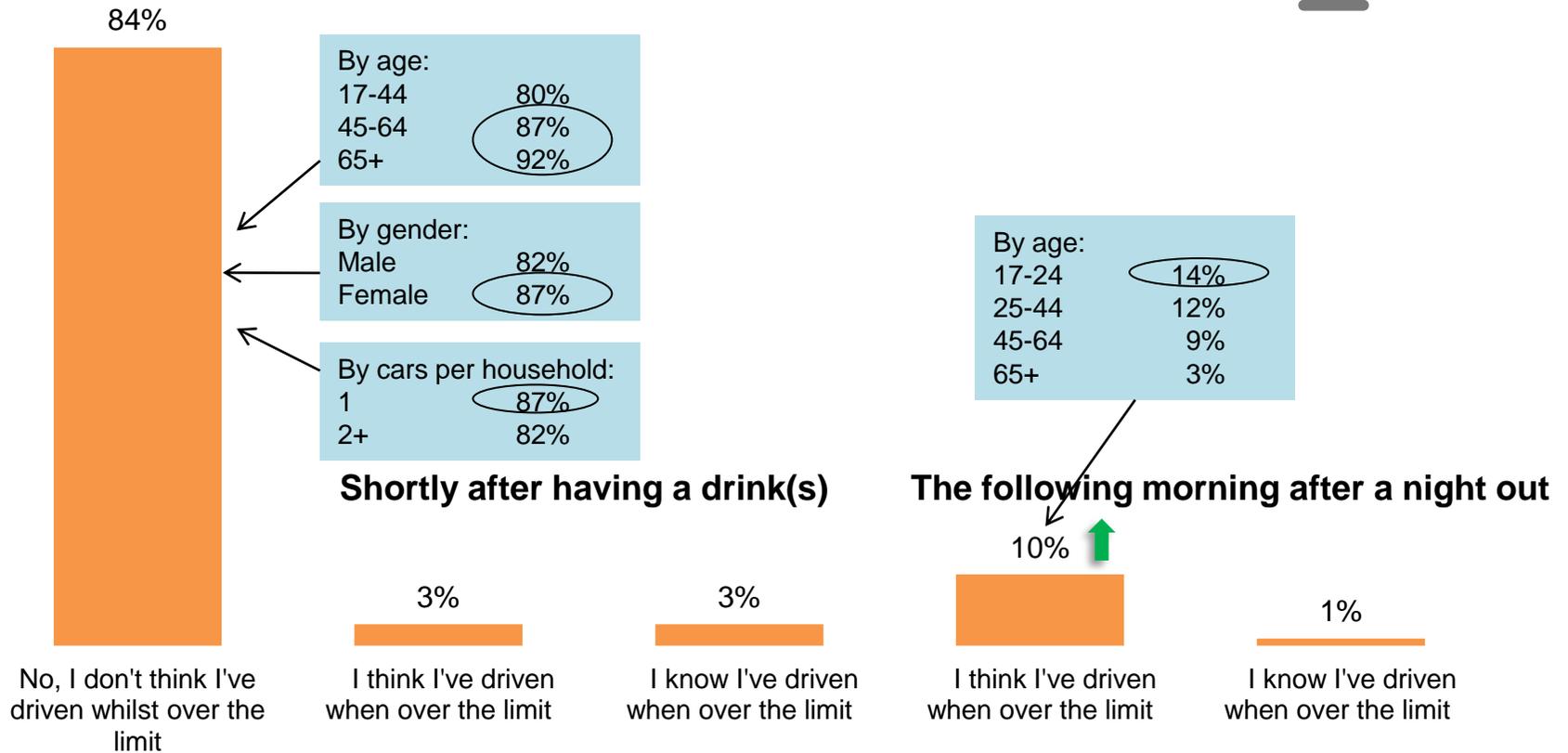


* **CAUTION:** Base very low (19), therefore, finding is indicative only.

Incidence of drink driving.

Drink drive behaviour has not changed in the last few years with very few knowingly driving drunk. Younger motorists are most likely to drive drunk, whether intentionally or not.

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

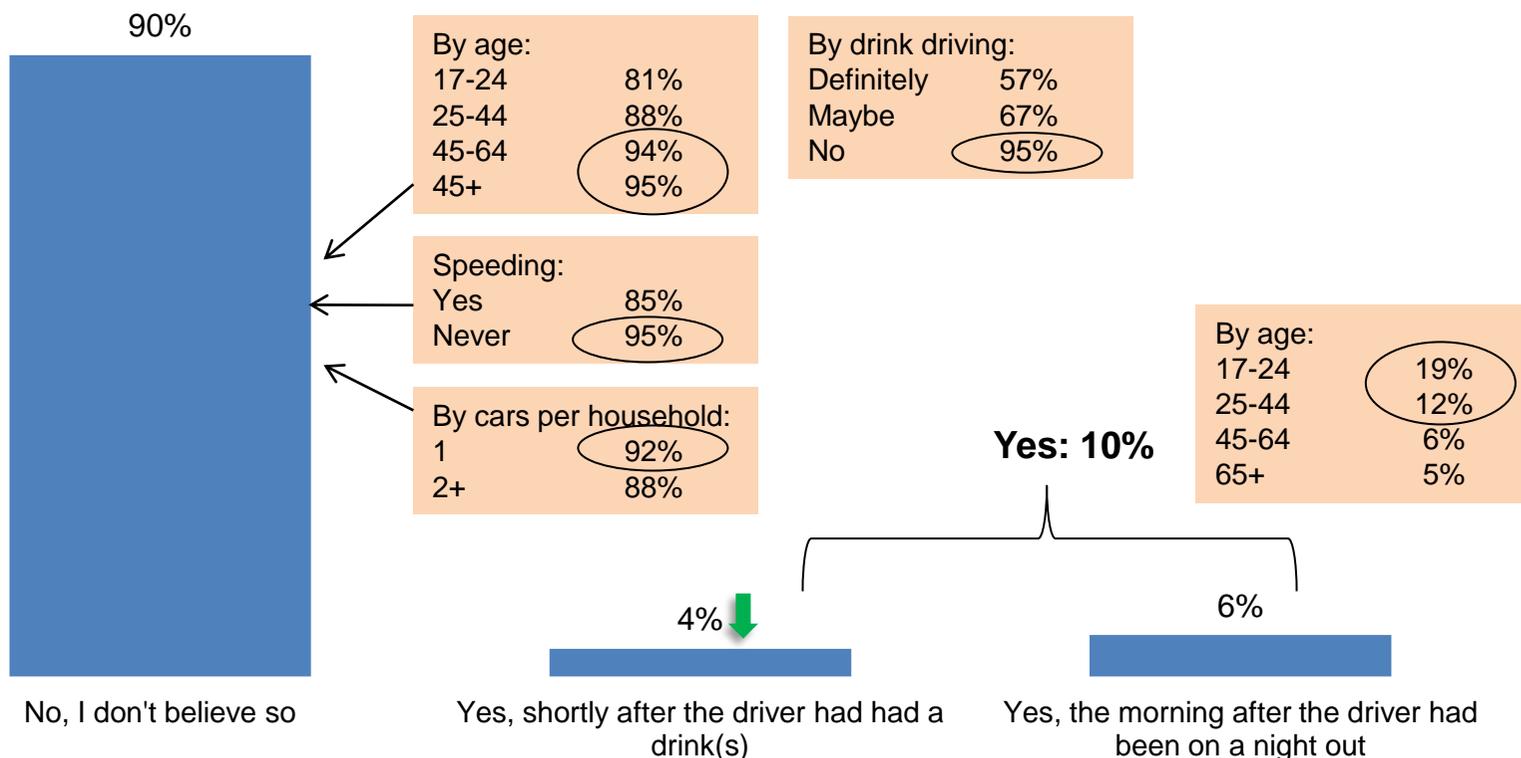


2012	89%	4%	3%	5%	1%
2011	84%	7%	3%	7%	2%

Drink-drive passengers.

This past year saw a decrease in the proportion of 'drink-drive passengers' since last year. Younger drivers, speeders and those who drink-drive themselves are most likely to get into a car whose driver is above the limit.

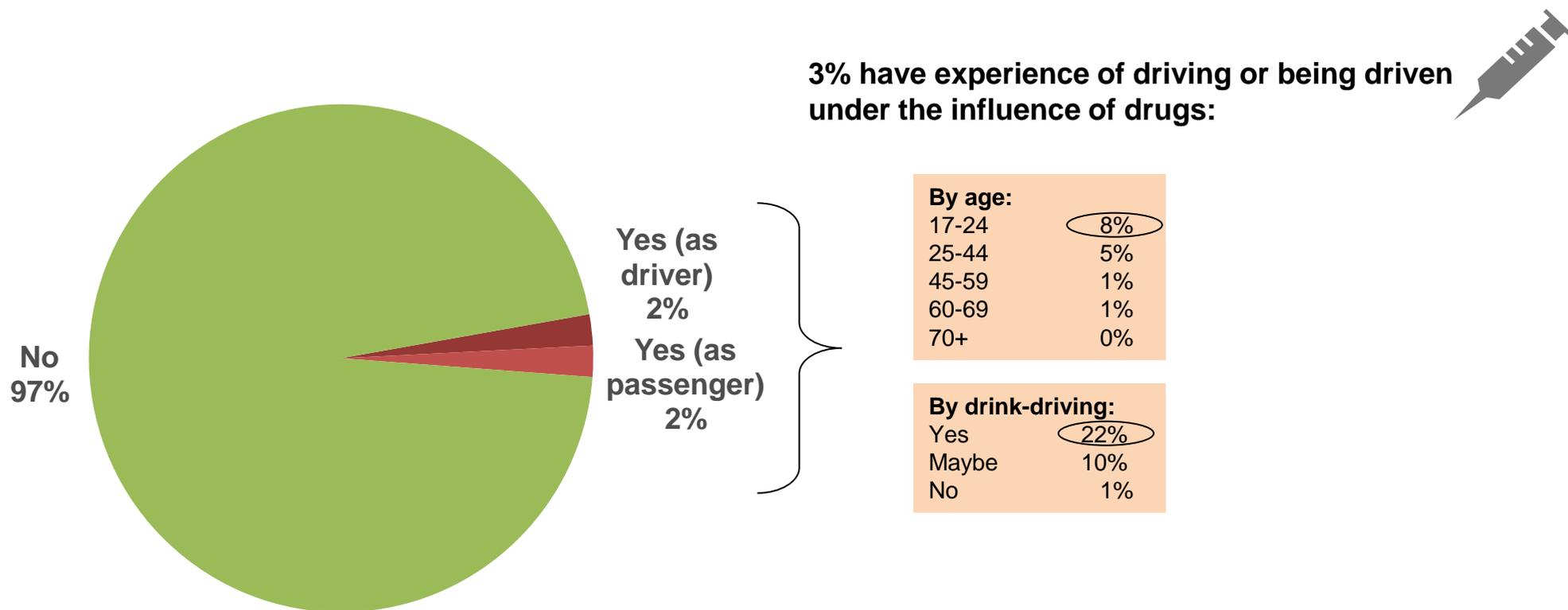
Have you ever been in a car when the driver was above the drink drive limit?



	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
2012	89%	9%	2%
2011	89%	8%	4%

Driving under the influence of drugs.

Only young or middle aged drivers have experienced drug-driving (as a driver or passenger). Those who have driven under the influence of alcohol are also more likely to have been in a drug-drive vehicle (22%).



2012	Yes (as driver) – 5%	Yes (as passenger) – 2%	No – 94%
2011	3%	2%	96%



Driving under the influence.

- Drink driving
- Drink driving as a passenger
- Drug driving



Speeding & speed limits.

Breaking the speed limit.

Those who speed are regular speeders with one-third speeding across all types of roads. As with previous years, many speed on the motorway. Two-thirds admit to speeding on motorways where 41% thought it was acceptable to do so.

In general, why do you speed on the motorway where the maximum is 70mph?

“To get to my destination quicker.”

“To use my car more economically.”

“To overtake someone, particularly those hogging up the middle lane”

“Sometimes it is necessary to exceed the limit in order to safely manoeuvre around traffic”

- Men (77%)
- Aged 65+ (58%)
- ABC1 (76%)
- South East (76%)
- North East (48%)
- Company car drivers (88%)
- Driven drunk (88%)

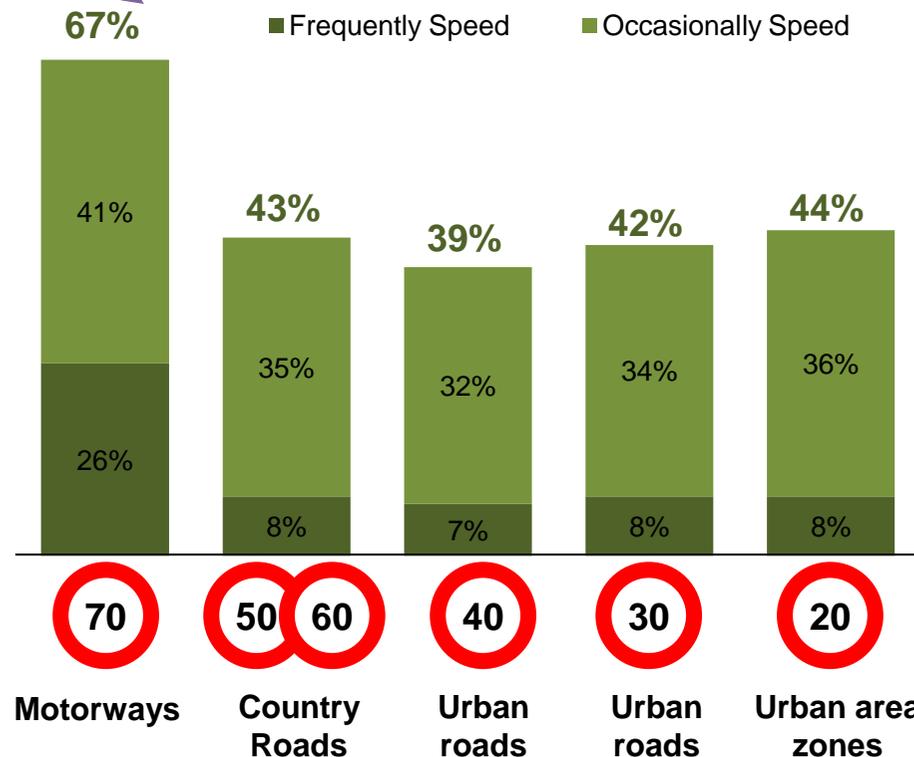
In general, why do you speed on urban roads where the maximum is 30mph?

“It’s easy to exceed 30mph without realising”

“If the road is quiet then 30mph is very slow”

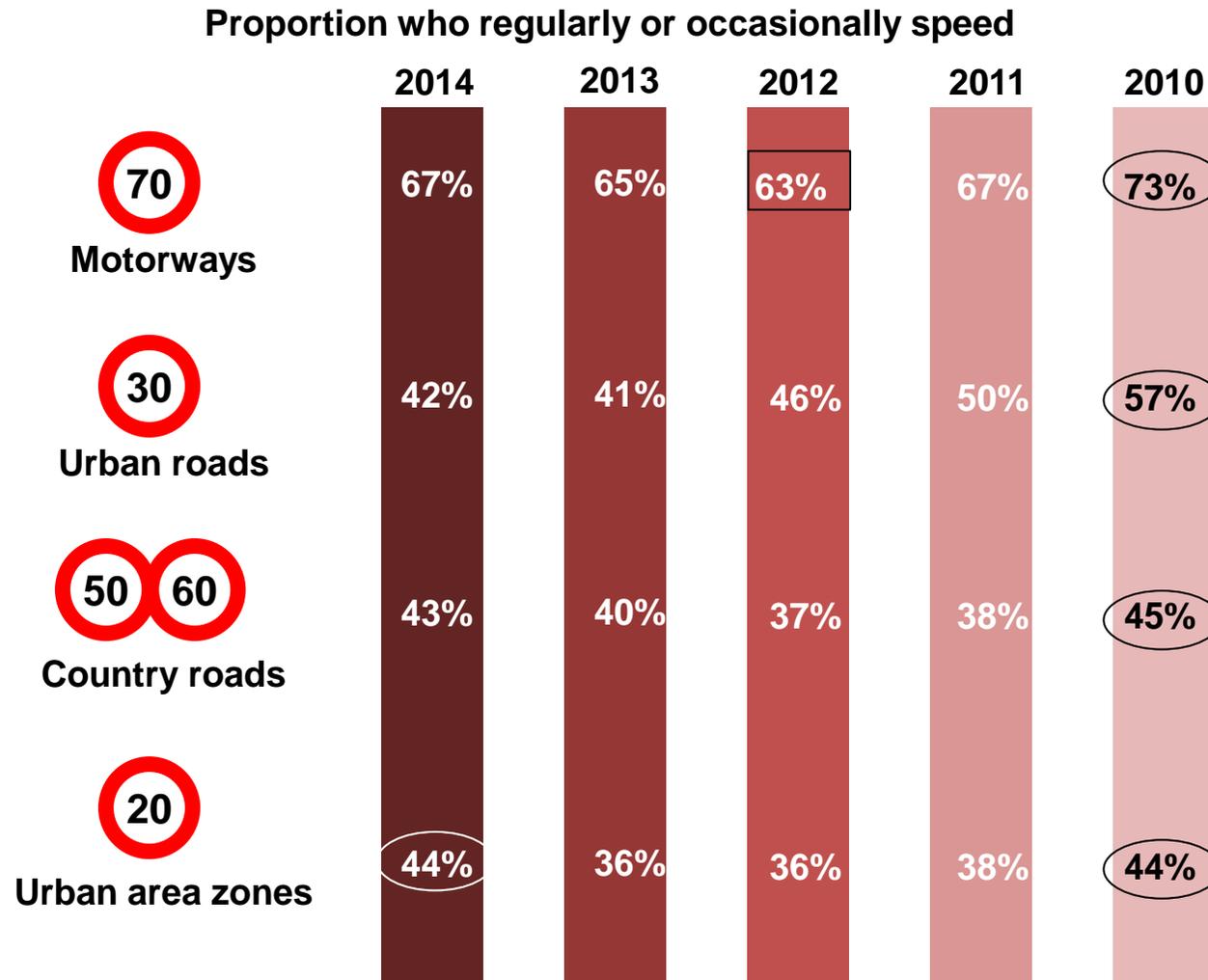
“Only if late at night when no other users or pedestrians on road”

“It is sometimes safer in some circumstances”



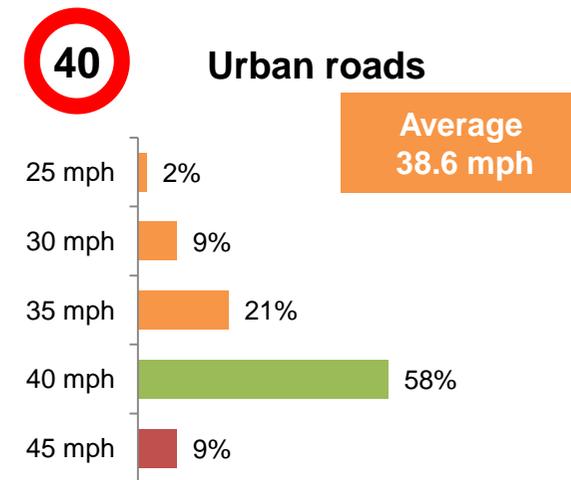
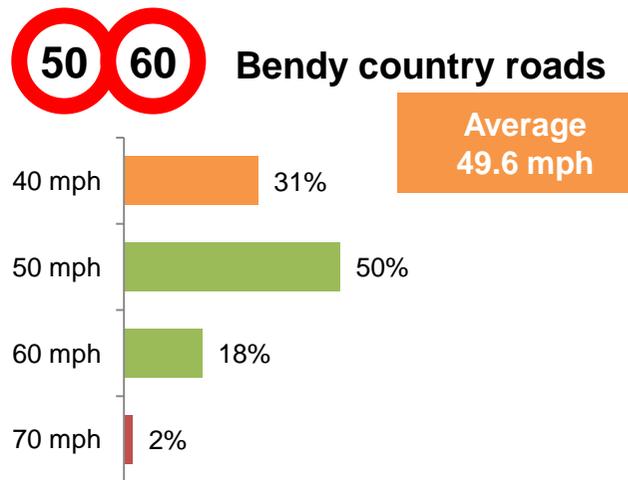
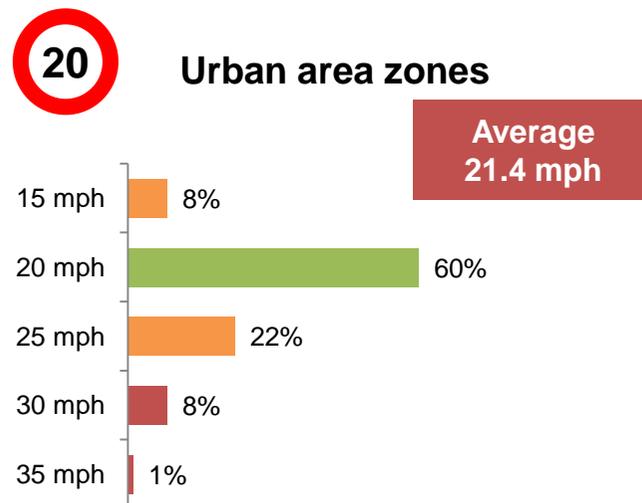
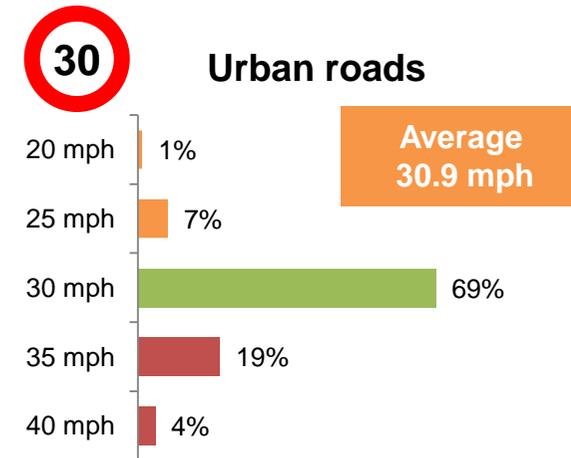
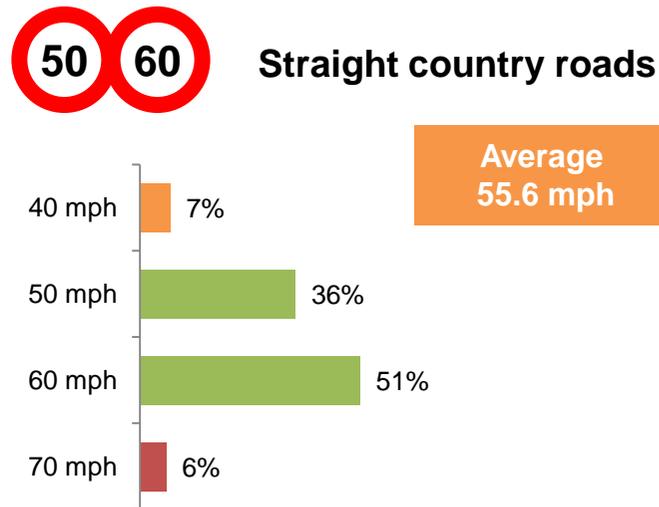
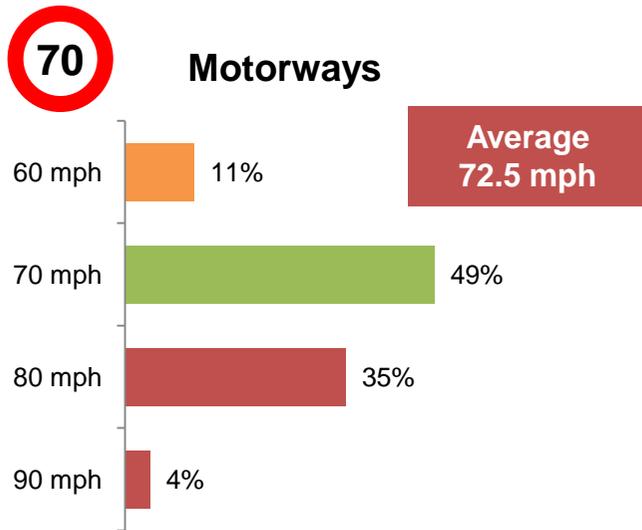
Breaking the speed limit.

The proportion speeding on urban roads where the speed limit is 30mph continues to decline steadily.



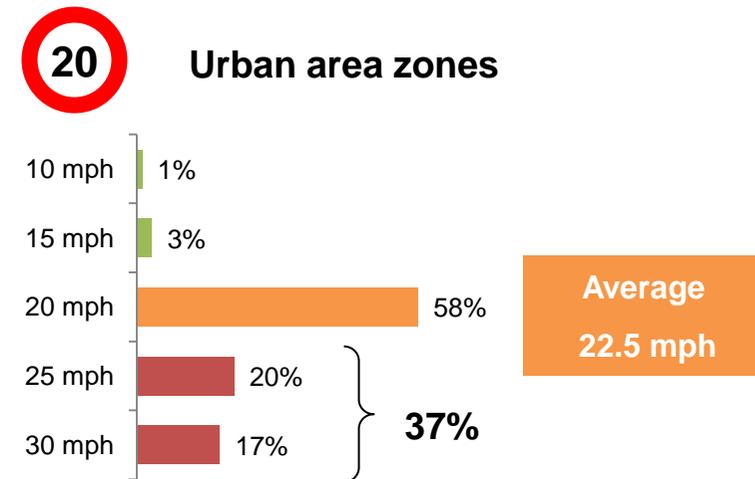
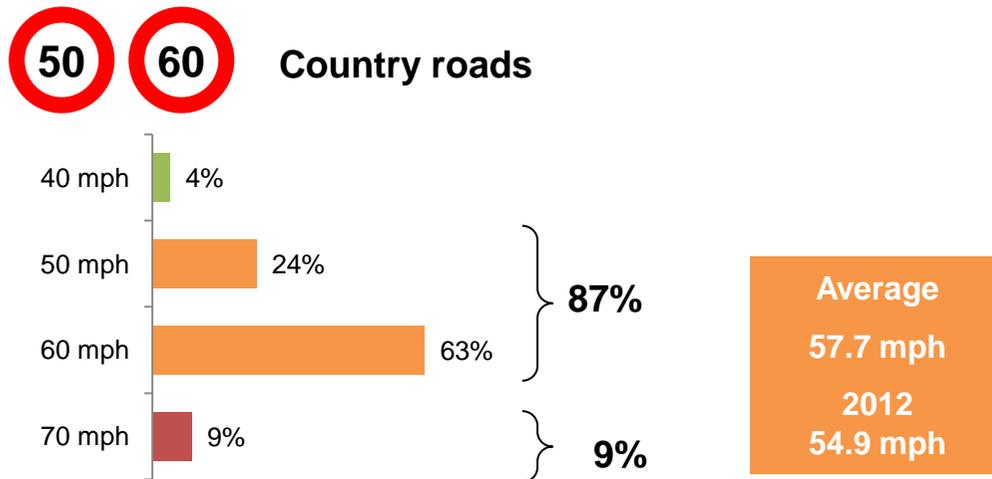
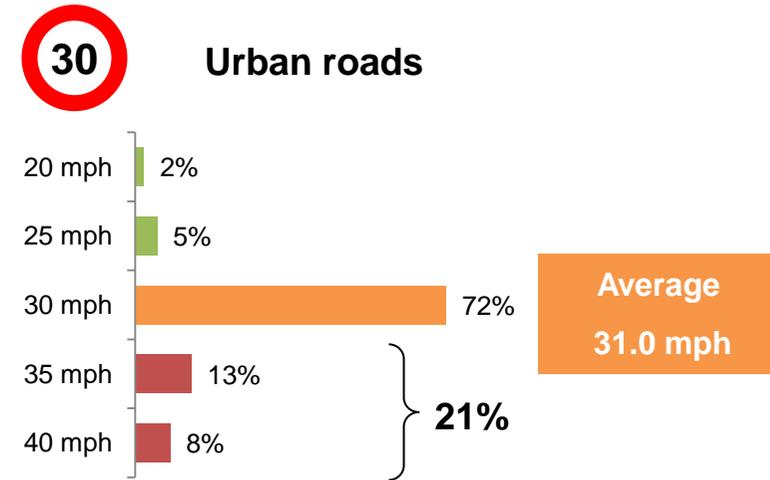
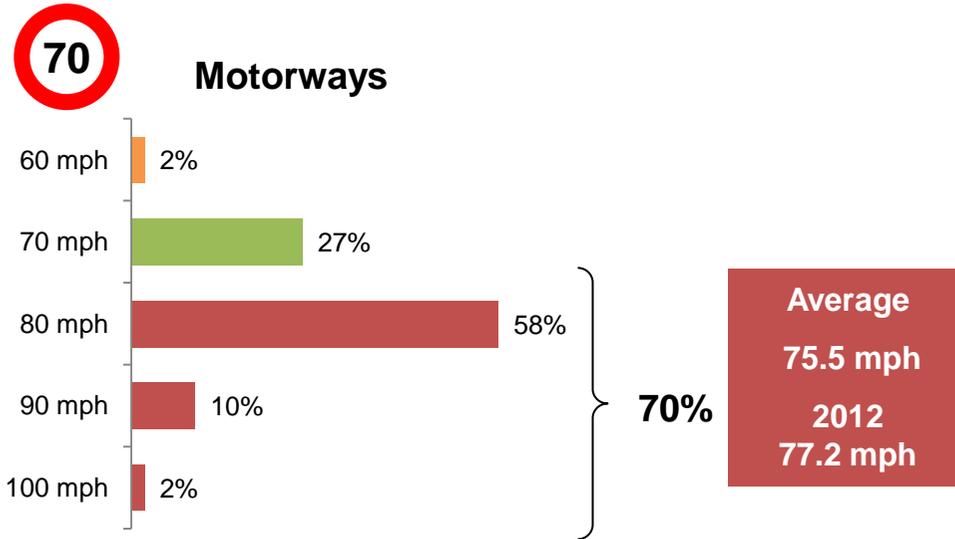
Average motoring speed.

With the exception of motorways the majority drive the speed limit most of the time. There are few who usually speed well above the speed limit.



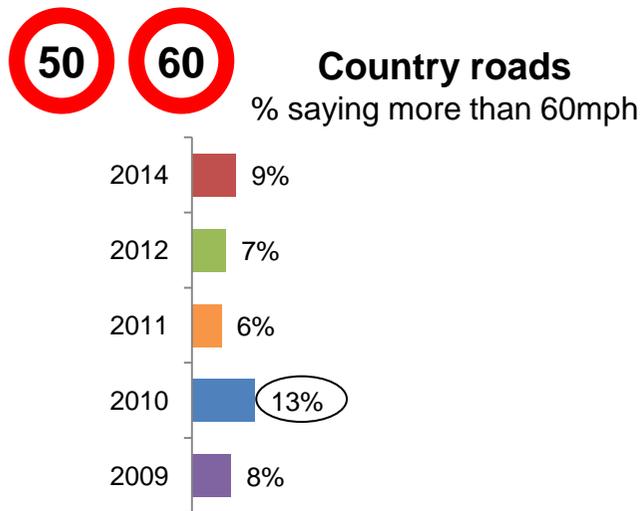
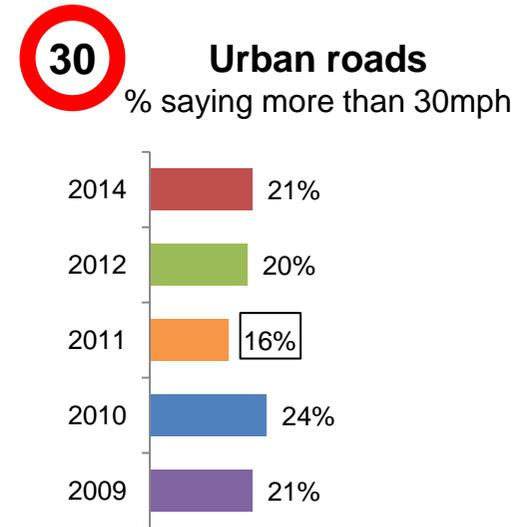
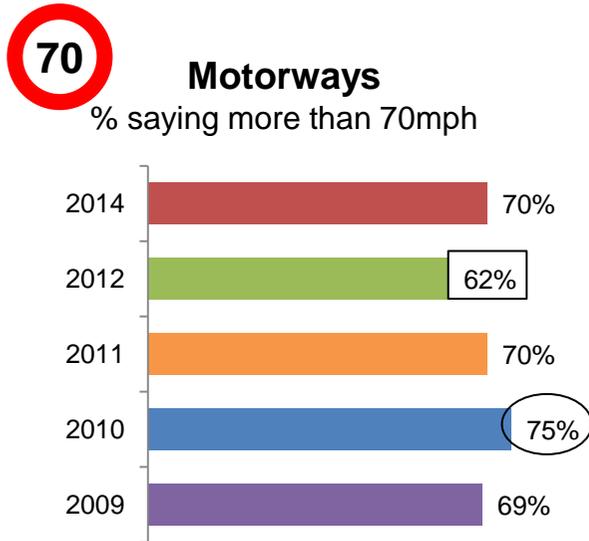
Maximum speed limits.

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.

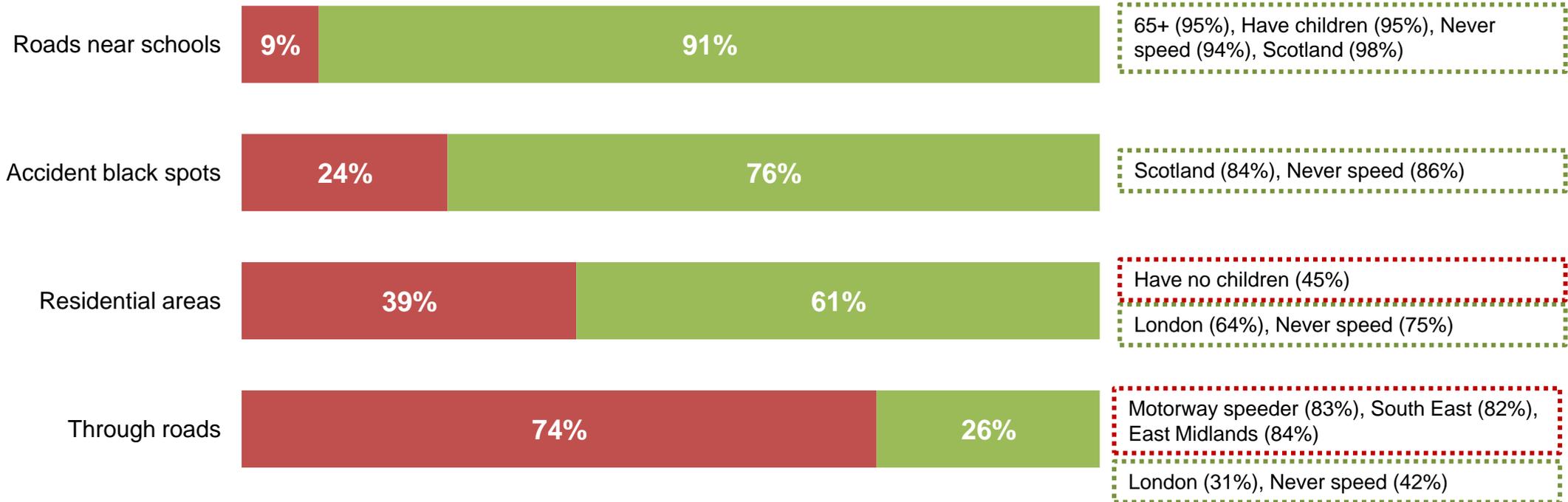
Since 2009 the desire for higher speed limits has remained relatively consistent.



Implementation of 20mph areas.

Motorists see 20mph speed limits as worthwhile near schools and areas that are known to be dangerous but as an overall speed limit outside of residential areas it is disliked.

■ Should not be implemented ■ Should be implemented



Of those who think a 20 mph speed limit is too low **90%** agree that a 20mph speed limit should not be implemented anywhere



Speeding & speed limits.

- Frequency of speeding
- Average speeds
- Preferred maximum speed limits
- 20mph speed limit



quadrangle

The Butlers Wharf Building
36 Shad Thames
London
SE1 2YE

Telephone +44 (0)20 7357 9919 Facsimile +44 (0)20 7357 9773 Website www.quadrangle.com