

The Road Safety Authority Vehicle Standards

National Barometer Survey 2017

September 2017

Prepared for:

The Road Safety Authority

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Research Background & Objectives

- This research was conducted to review a series of issues relating to Vehicle Standards on behalf of the Road Safety Authority:
 - ❖ Car Servicing
 - ❖ Car Checks
 - ❖ Second hand tyres
 - ❖ Performance labels of tyres
 - ❖ Second hand cars
 - ❖ National Car Test (NCT)
- The research was conducted by Behaviour & Attitudes on our nationally representative Barometer survey.
- Each Behaviour & Attitudes Barometer survey is based on a nationally representative quota sample of 1,000 adults (aged 16 years and over) with a fresh sample used for each fortnightly survey.
- All interviewing is conducted by fully trained and experienced members of the Behaviour & Attitudes field-force, who work under direct supervision and are subject to rigorous quality controls (personal, postal and telephone checks). All aspects of our Barometer survey operate to the guideline standards established by the company's membership of the MRS and ESOMAR (the international industry representative body).
- The research was conducted in July/ August 2017.

Sample Profile: Motorists

Base: All Adults n – 1,000 (3,694,000)

**RSA Tracker Average
2011 - 2017**

70%



The National Survey delivered a sample of 695 Motorists (70%).

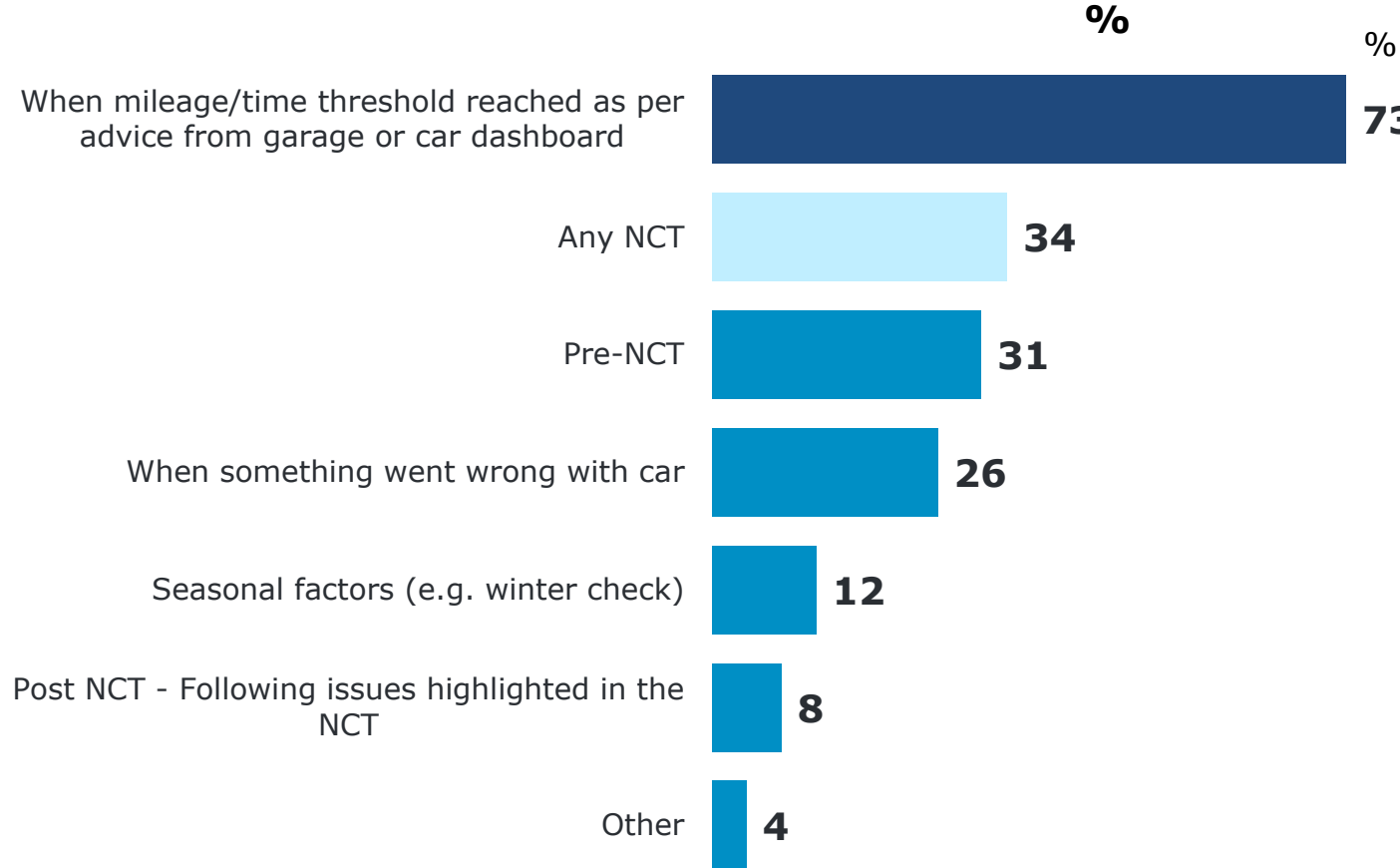


Car Servicing

Prompts to Service car

Base: All motorists n - 695

What prompted you to service your car?



The most prominent prompt for servicing our cars is reaching prescribed mileage or time thresholds. 34% of motorists reference NCT as a prompt (either Pre – or Post).

Q.3 Thinking about when you got your car serviced in the past, which, if any of these situations prompted you to service your car?

Prompts to Service car

Base: All motorists n - 695

PROMPS	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	695	376	319	160	244	194	97	355	340	203	492	444	251
	%	%	%	%	%	%	%	%	%	%	%	%	%
When mileage/time threshold reached as per advice from garage or car dashboard	73	78	67	72	69	76	80	77	70	77	72	74	72
When something went wrong with car	26	26	26	29	29	25	17	29	23	29	24	28	22
Pre-NCT	31	29	33	29	35	32	25	32	31	36	29	32	30
Seasonal factors (e.g. winter check)	12	12	11	10	11	13	14	12	11	8	13	11	13
Post NCT: Following issues highlighted in the NCT	8	10	6	12	8	7	3	10	6	3	10	5	12
Other	4	3	6	6	4	4	1	5	4	1	5	4	4
- ANY NCT	34	32	36	34	37	33	28	34	33	38	32	34	33

The pattern of prompts for servicing is largely consistent across the key demographic groups; Prompt via 'Pre- NCT' is higher among Dublin motorists.

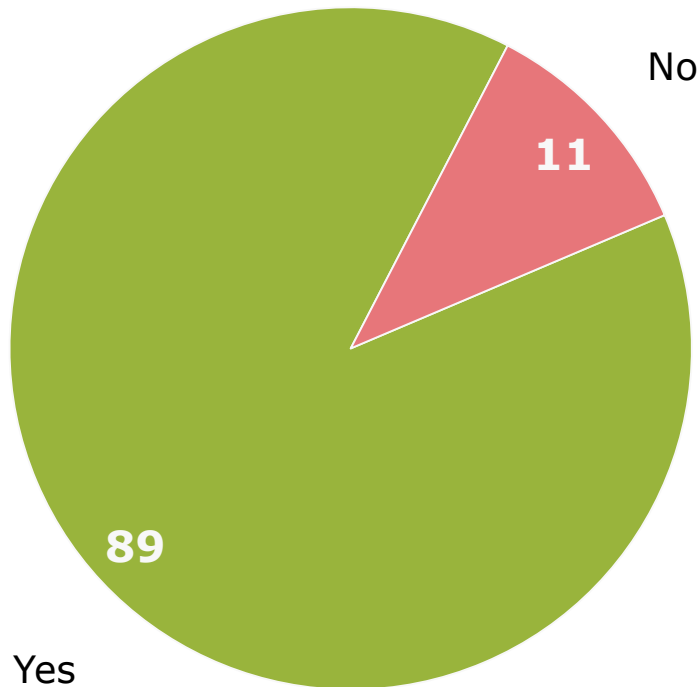


Q.3 Thinking about when you got your car serviced in the past, which, if any of these situations prompted you to service your car?

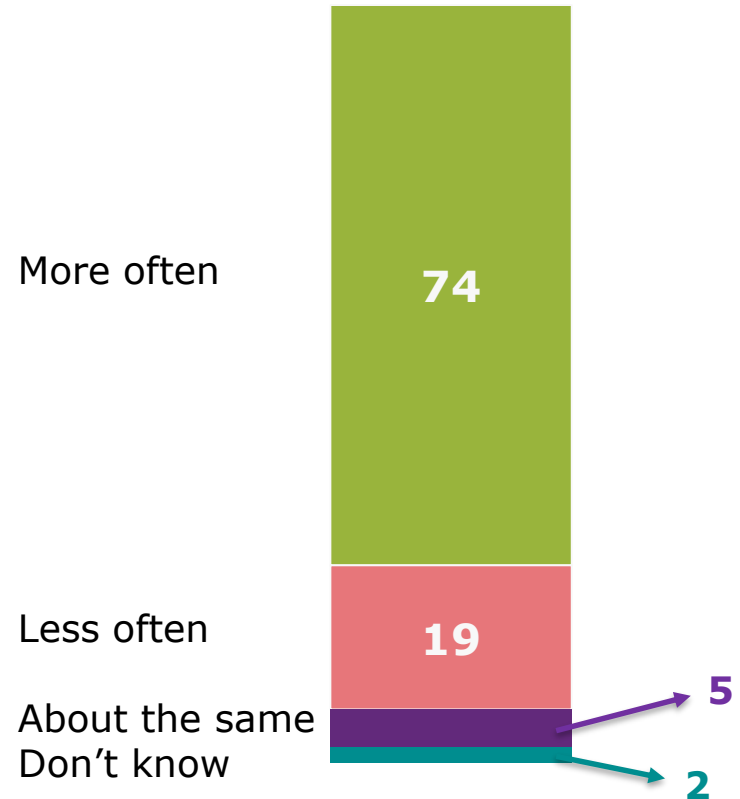
Legal responsibility to ensure car is roadworthy

Base: All motorists n - 695

Awareness of legal responsibility
%



Does legal responsibility prompt you to service your car?
%



There is strong apparent awareness of owner's legal responsibility to ensure their vehicle is kept in a safe and roadworthy condition at all times

- Q.4 Prior to this interview, were you aware that it is the legal responsibility of the owner/driver to ensure their vehicle is kept in a safe and roadworthy condition at all times?
- Q.5 Does legal responsibility prompt you to service your car?



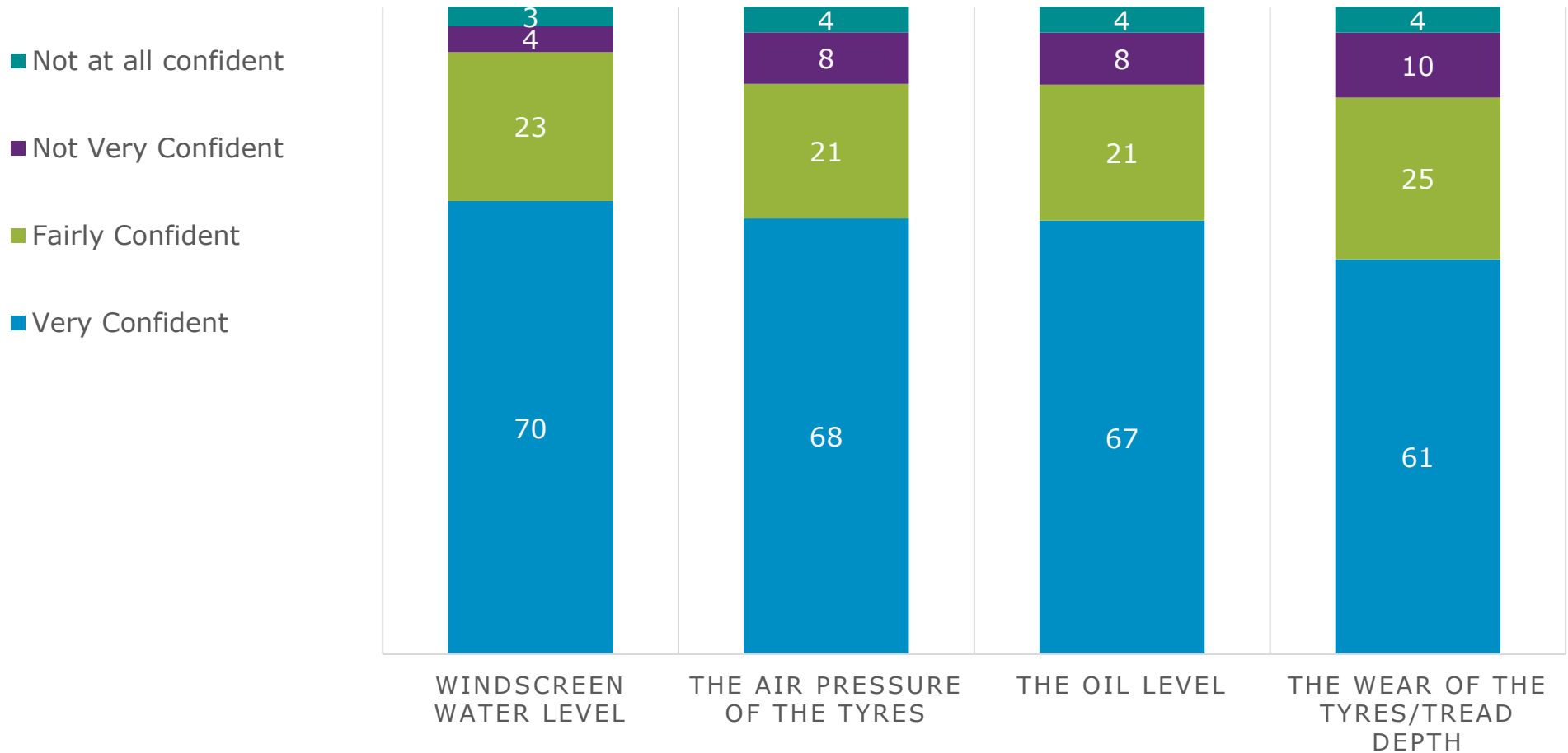


Car Checks

Confidence in conducting car checks

Base: All motorists n - 695

Confidence in knowing how to check the following:
%



The general level of confidence to conduct the range of car checks appears high, albeit does drop for checking the wear of tyres.



Q.6 How confident are you that you know how to check the following in your car?

Confidence in conducting car checks

Base: All motorists n - 695

Very confident in checking:	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	695	376	319	160	244	194	97	355	340	203	492	444	251
	%	%	%	%	%	%	%	%	%	%	%	%	%
Windscreen water level	70	82	56	73	69	72	67	71	69	61	73	68	74
The air pressure of the tyres	68	84	49	70	64	72	65	68	68	61	70	66	70
The oil level	67	83	48	72	64	69	63	67	66	58	70	66	68
The wear of the tyres/tread depth	61	78	41	62	58	64	62	60	61	52	64	60	61

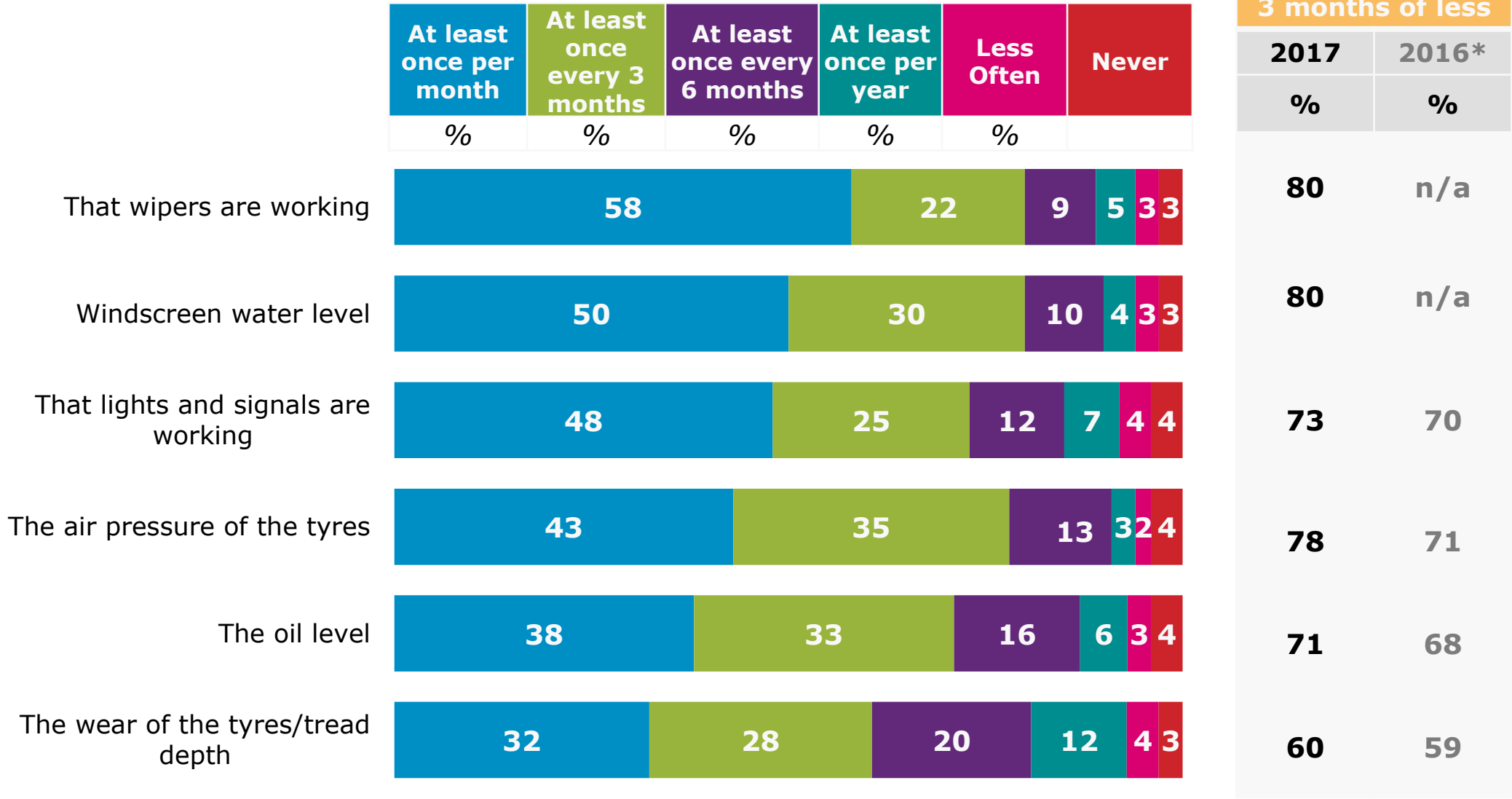
The level of high confidence in conducting each car check drops sharply among female motorists and also in Dublin; highlighting the likely need for education initiatives to be targeted both on a gender and regional basis.

Q.6 How confident are you that you know how to check the following in your car? ... the air pressure of the tyres.



Frequency of car checks

Base: All motorists n - 695



Frequency of car checks is generally strong. Checking of tread depth does occur less frequently.



Q.7 How often, if at all, are the following checked in your car?

*RSA Driver Attitudes & Behaviours survey 2016

Frequency in car checks

Base: All motorists n - 695

What gets checked quarterly / every 3 months?	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DE F	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	695	376	319	160	244	194	97	355	340	203	492	444	251
	%	%	%	%	%	%	%	%	%	%	%	%	%
That wipers are working	80	82	77	81	82	81	72	82	78	81	80	23	20
Windscreen water level	81	85	75	84	81	82	73	83	78	80	81	32	27
That lights and signals are working	73	79	66	73	74	73	68	74	72	74	72	27	22
The air pressure of the tyres	78	86	69	79	80	78	74	79	78	82	77	34	37
The oil level	71	78	62	72	67	77	67	67	74	74	69	29	39
The wear of the tyres/tread depth	60	67	53	63	57	65	56	62	59	65	59	31	23
None of these	8	5	11	7	7	6	14	5	10	5	9	8	8

Frequency of checks is again typically stronger amongst males. Little difference in levels of frequency in/outside Dublin.



Q.7 How often, if at all, are the following checked in your car?



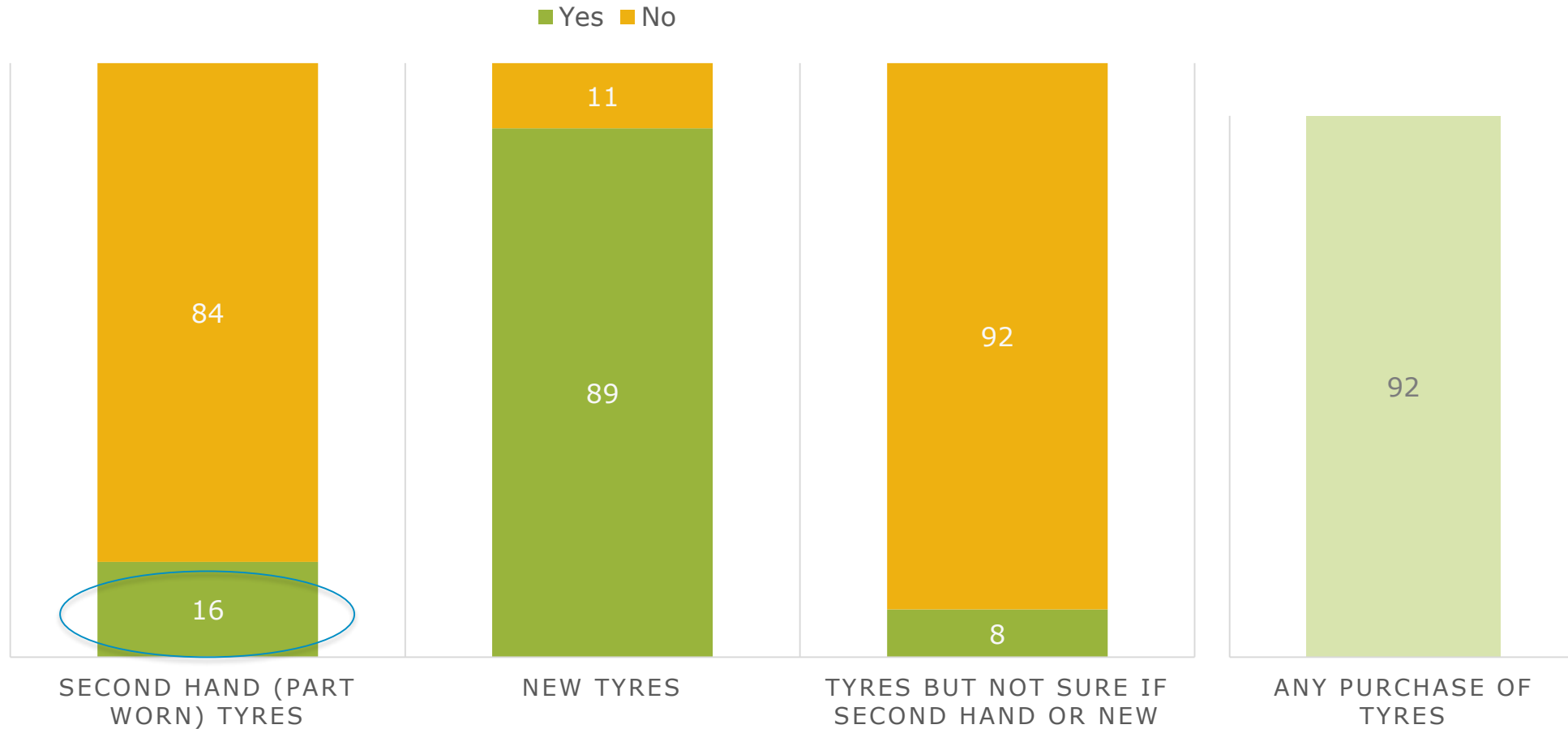
Tyres



Types of tyres ever purchased

Base: All motorists n - 695

What type of tyres have you brought
%



At least 16% of motorists have purchased second hand tyres

Types of tyres ever purchased

Base: All motorists n - 695

Have bought tyres for their vehicle	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	695	376	319	160	244	194	97	355	340	203	492	444	251
	%	%	%	%	%	%	%	%	%	%	%	%	%
Second hand (part worn) tyres	16	17	15	21	18	17	6	13	19	17	16	19	12
New tyres	89	92	86	85	90	92	90	92	87	78	94	89	94
Tyres but not sure if second hand or new	8	8	7	6	10	9	5	8	8	10	7	8	8
Any purchase of tyres	92	93	90	89	93	94	90	93	90	80	86	89	96

Purchase of past worn tyres peaks among younger motorists.

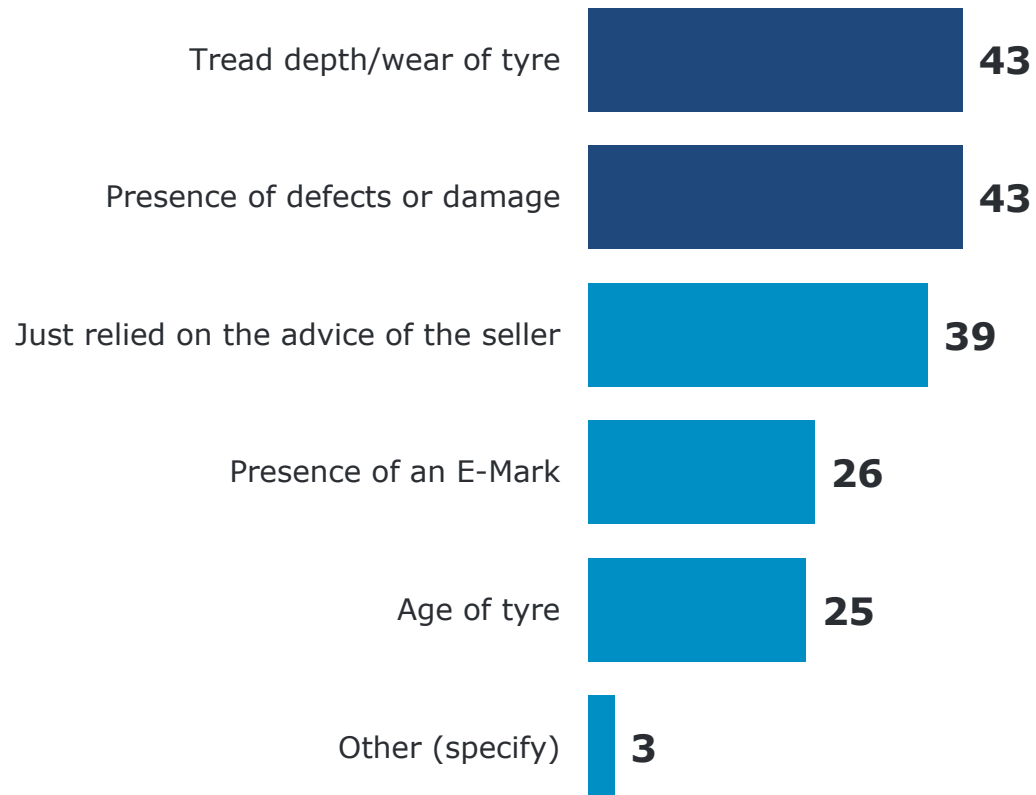


Q.8 Have you ever purchased second hand (part worn) or new tyres?

Checks before purchasing second hand tyres

Base: Every purchased second hand tyres n – 111 (16%)

Did you carry out any of the following checks when you purchased second hand tyres?
%

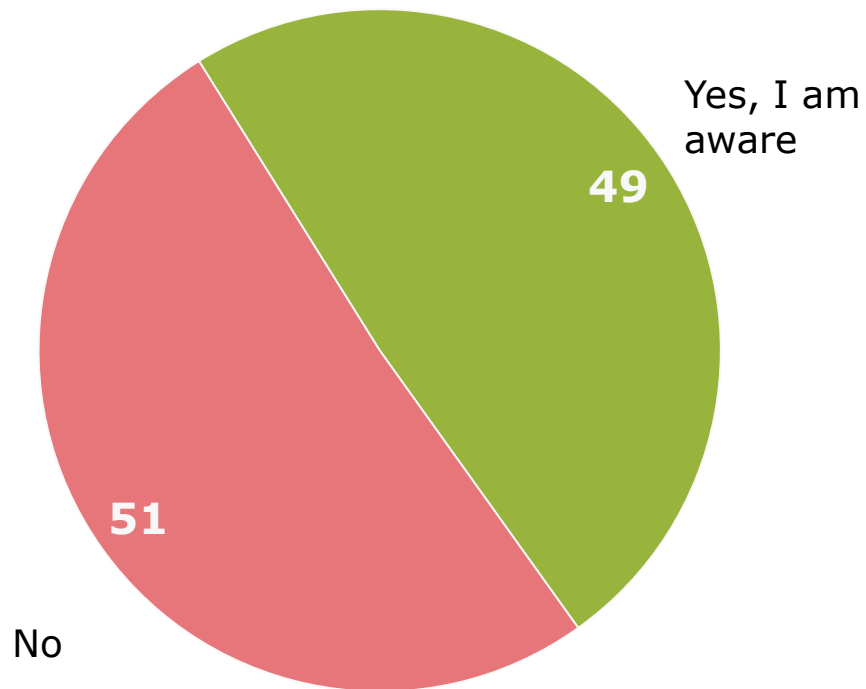


39% of purchasers of second hand tyres relied solely on the advice of the seller.

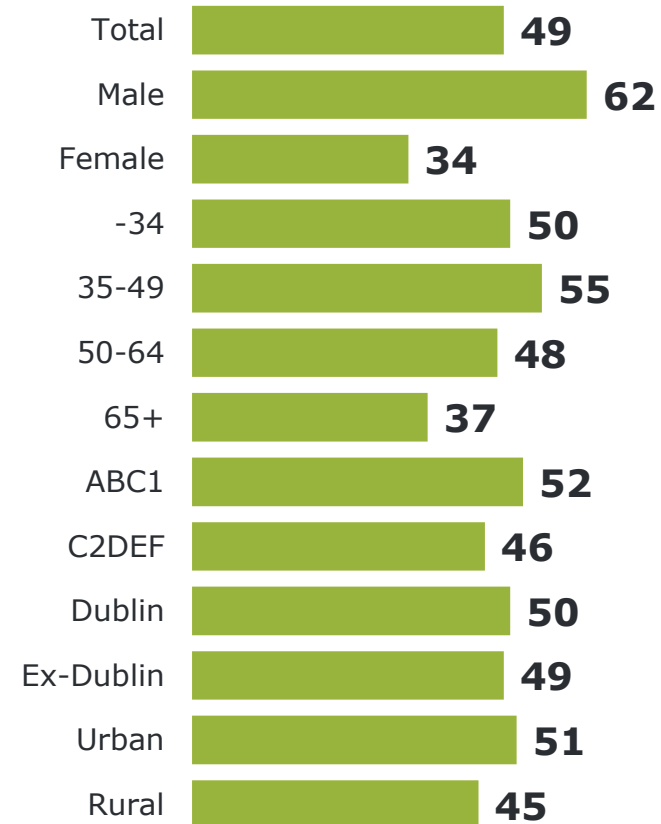
Awareness of label information on tyres

Base: All motorists n - 695

Awareness that most tyres have performance information labels
%



Information on who said they were aware about performance information labels
%

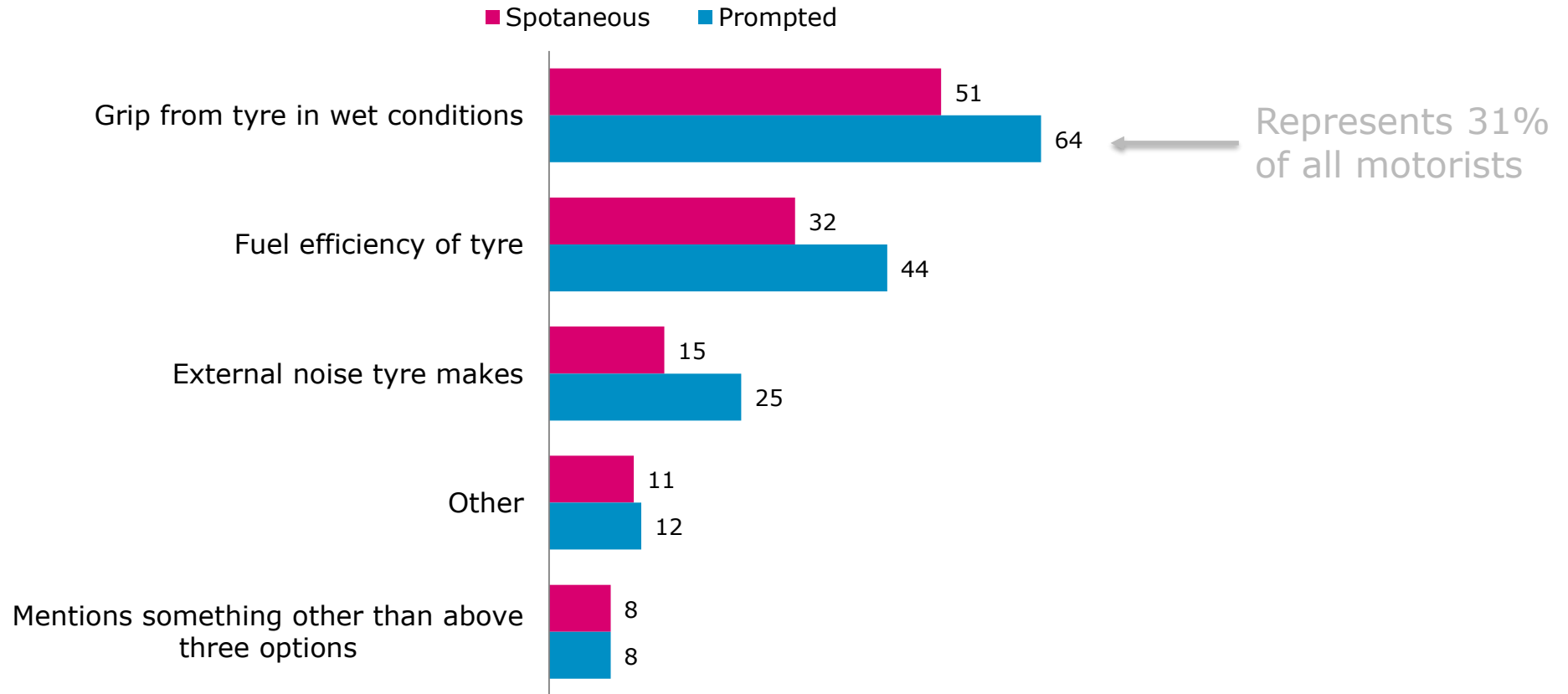


About half of all motorists are aware that most tyres have labels that provide performance information; awareness lowest among female motorists (34%).

Recall of types of information tyre labels provide

Base: Aware of performance labels on tyres n – 347 (49%)

Which types of performance information recalled that labels on tyres provide %



The most likely recalled information on tyre labels is 'Grip from tyre in wet conditions'.

Usage of performance labels when purchasing tyre

Base: Aware of performance labels on tyres n – 347 (49%)

Ever used performance labels to choose tyres
%

Yes

30%

← 15% of all motorists

Tyre retailer has explained performance labels to you when purchasing
%

Yes

40%

← 20% of all motorists

Usage of performance labels when purchasing tyres is modest – only 15% of motorists have done so; only 20% of motorists have had a retailer explain labels to them.

Q.12 Have you ever used the performance label of a tyre to help you choose one tyre over another?

Q.13 Has a tyre retailer ever explained to you the information on the performance label of a tyre you are buying?

Usage of performance labels when purchasing tyre

Base: Aware of performance labels on tyres n – 347 (49%)

Answered yes to Q.12 and Q.13	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	347	236	111	82	132	94	39	184	163	102	245	233	114
	%	%	%	%	%	%	%	%	%	%	%	%	%
Used performance label to choose a tyre	30	36	18	31	36	30	12	33	27	31	30	30	32
Had a retailer explain performance label when purchasing	40	44	31	45	44	33	29	44	36	39	40	36	46

**Only 18% of female motorists aware of performance labels have used them to help choose tyres – this equates to only 6% of all female motorists.
Rural motorists are more likely to have had retailers explain performance labels.**

Q.12 Have you ever used the performance label of a tyre to help you choose one tyre over another?

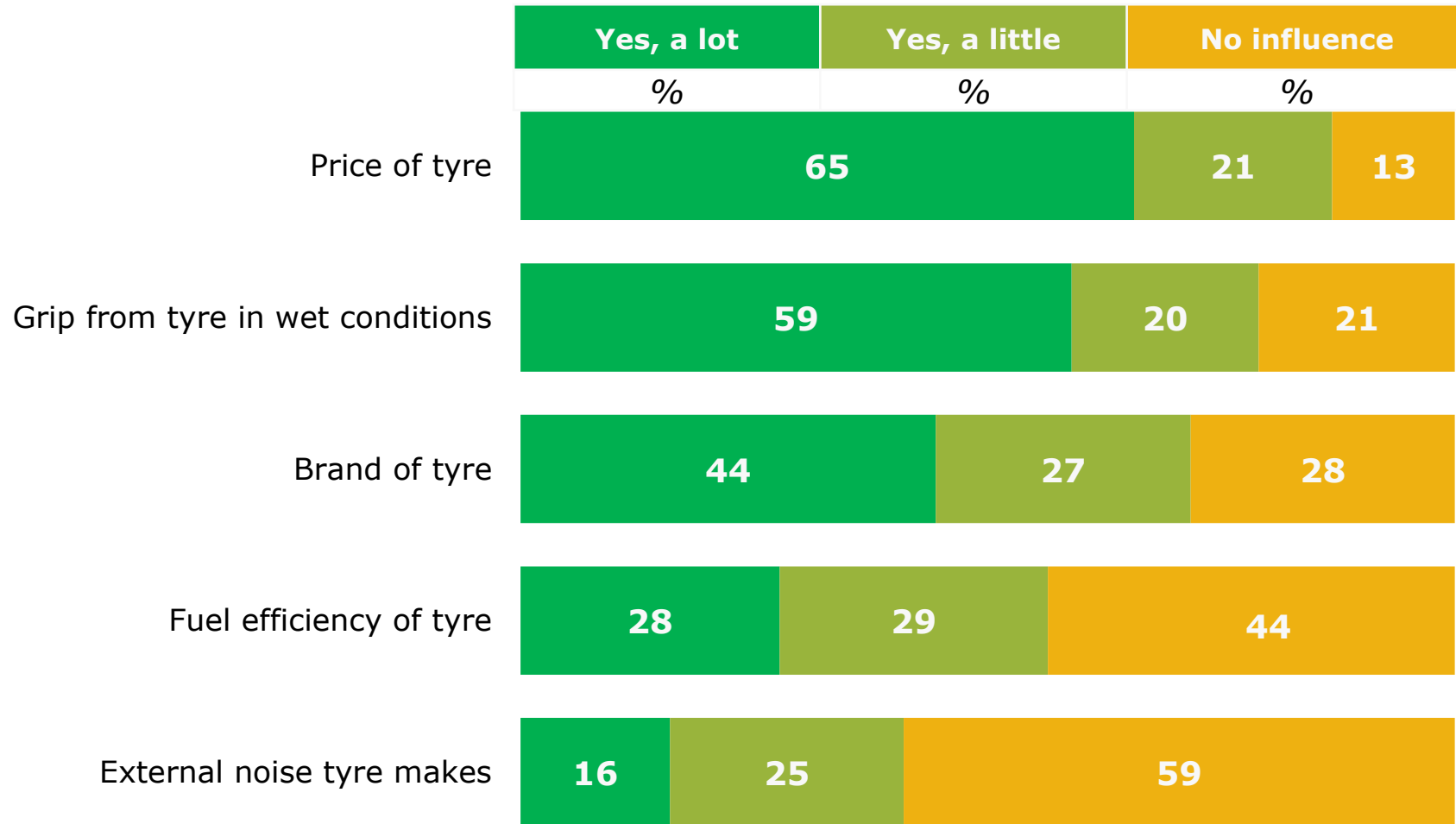
Q.13 Has a tyre retailer ever explained to you the information on the performance label of a tyre you are buying?



Features influencing type of tyre purchased

Base: Ever purchased tyres (new or second hand) n – 635 (92%)

Last time you purchased a tyre, which of these features influenced your decision



Price and grip in wet conditions are the most influential features when purchasing tyres.



Q.14 Last time you purchased a tyre, which of these features influenced your decision?

Features influencing type of tyre purchased

Base: Ever purchased tyres (new or second hand) n – 635 (92%)

Answered yes a lot to Q.14	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	635	350	285	142	224	182	87	329	306	160	475	394	241
	%	%	%	%	%	%	%	%	%	%	%	%	%
Price of tyre	65	68	62	73	72	56	55	65	66	54	69	58	76
Grip from tyre in wet conditions	59	66	51	58	58	63	60	65	54	53	61	57	62
Brand of tyre	44	52	35	48	43	43	43	52	37	45	44	43	44
Fuel efficiency of tyre	28	32	22	28	31	27	20	31	24	36	25	32	22
External noise tyre makes	16	18	13	16	15	15	16	20	11	16	15	18	11
Any	84	89	79	88	87	82	79	87	82	85	84	83	87

Influence of features in tyre purchase is typically stronger among male motorists. Influence of Price much stronger among younger and rural motorists.



Q.14 Last time you purchased a tyre, which of these features influenced your decision?

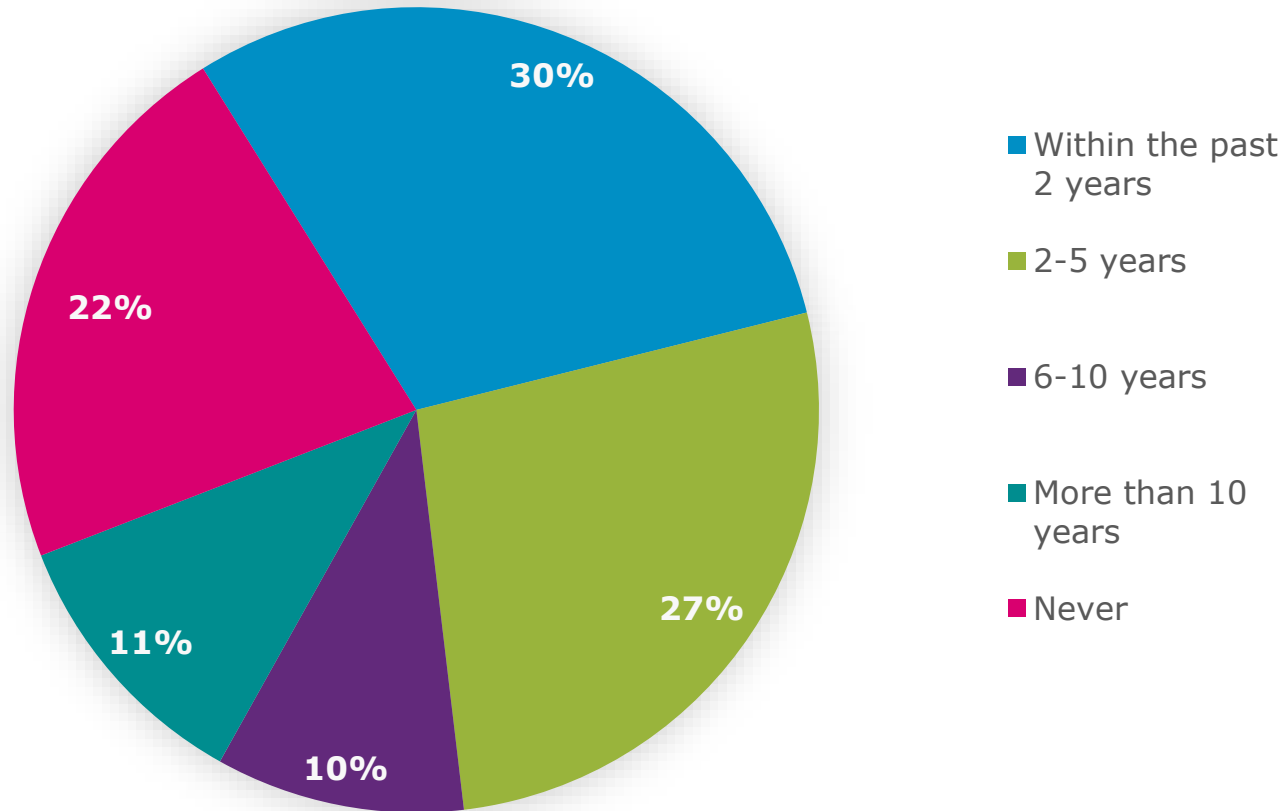


Second hand cars and NCT

Recent purchase of second hand cars

Base: All motorists n - 695

When, if ever was the last time you bought a second hand car
%



**69% of motorists have purchased a second hand car within the last 10 years.
(57% within the last 5 years).**

Recent purchase of second hand cars

Base: All motorists n - 695

Purchased a second hand car	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	695	376	319	160	244	194	97	355	340	203	492	444	251
	%	%	%	%	%	%	%	%	%	%	%	%	%
Within the past 2 years	30	31	30	51	28	24	17	34	27	21	34	30	30
2-5 years	27	27	27	26	32	26	21	23	31	24	29	24	33
6-10 years	10	10	9	6	12	9	13	9	10	7	11	9	10
More than 10 years	11	11	10	1	7	16	24	10	11	15	9	12	9
Never	22	21	24	17	22	25	25	23	21	34	18	25	18

Most recent purchasers (within past 2 years) peaks significantly among young motorists.



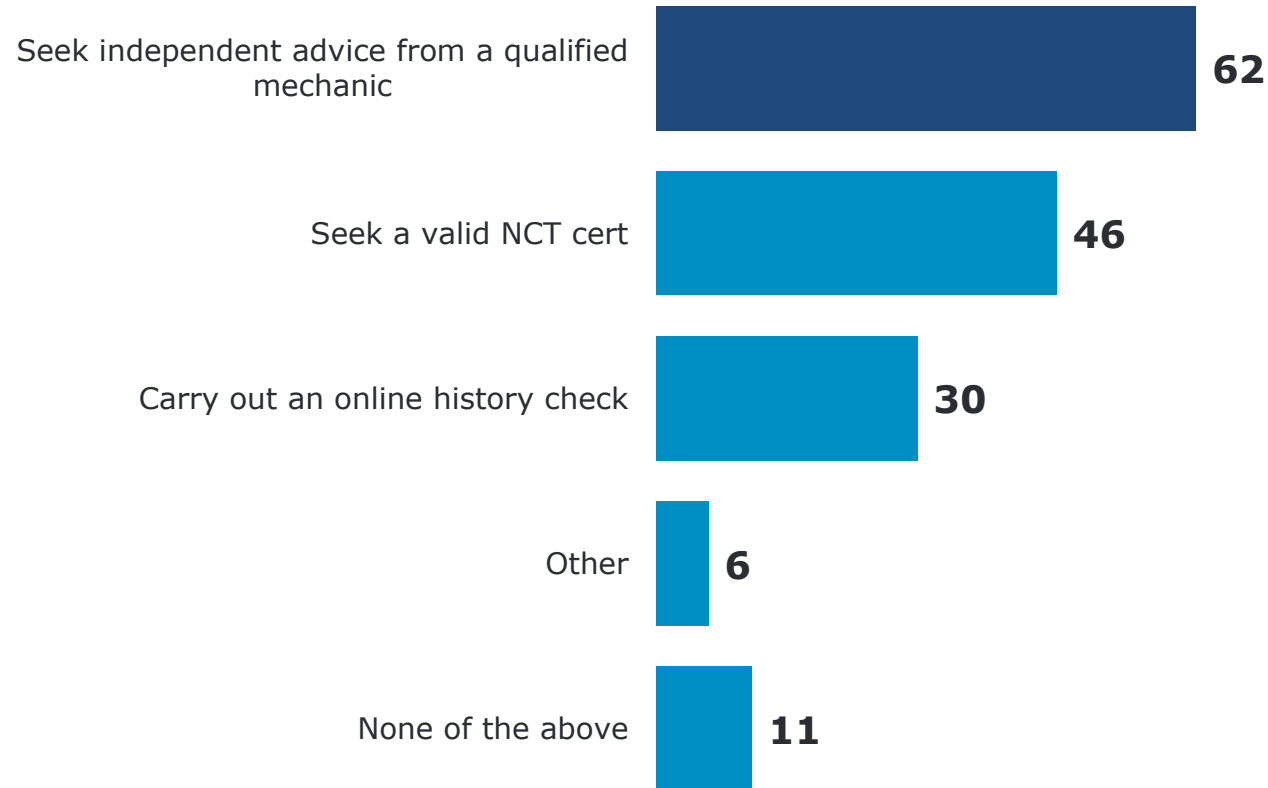
Q.15 When, if ever, was the last time you bought a second hand car?

Checks before purchasing second hand car

Base: Purchased second hand car within last 10 years n – 466 (69%)

Did you do any of the following when you bought your second hand car?

%



62% of second hand car purchasers sought independent advice from a qualified mechanic and 46% sought a valid NCT cert.

Checks before purchasing second hand car

Base: Purchased second hand car within last 10 years n – 466 (69%)

Purchased a second hand car	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DE F	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	466	255	211	133	171	113	49	234	232	106	360	284	182
	%	%	%	%	%	%	%	%	%	%	%	%	%
Seek independent advice from a qualified mechanic	62	59	65	59	63	64	62	64	60	71	59	30	30
Seek a valid NCT cert	46	47	45	52	44	44	40	48	43	47	45	24	33
Carry out an online history check	30	35	24	38	30	23	25	40	22	32	30	9	10
Other	6	6	5	7	5	4	9	5	6	1	7	25	18
None of the above	11	10	12	8	13	15	7	9	13	14	10	12	9

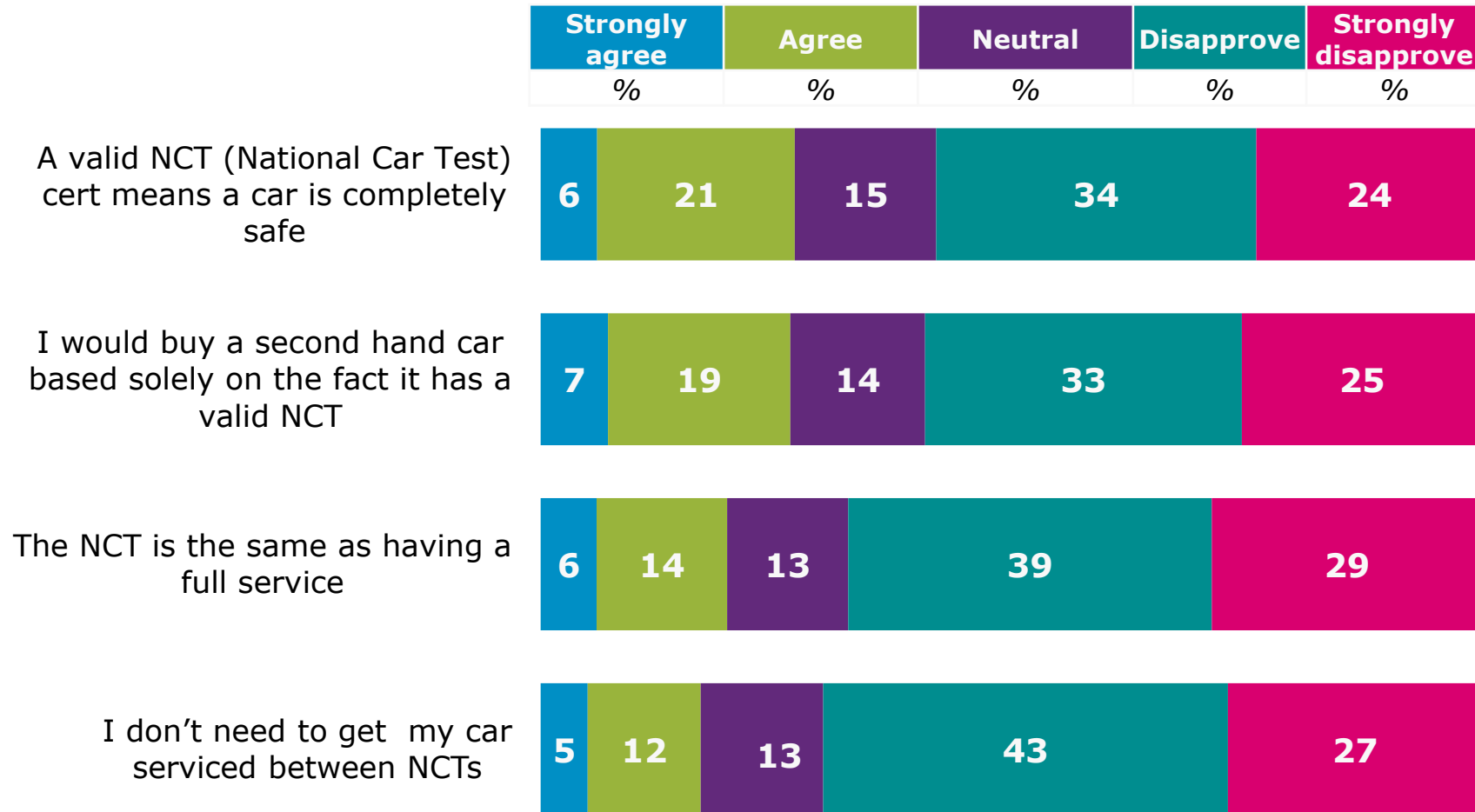
Seeking a valid NCT cert is more likely among younger purchasers.



Attitudes towards the NCT

Base: All motorists n - 695

To what extent do you agree or disagree with the following:
%



At least 1 in 4 motorists agree that a valid NCT cert means a car is 'completely safe'



Q.17 To what extent do you agree or disagree to the following?

Attitudes towards the NCT

Base: All motorists n - 695

Any agree	Total	Gender		Age				Social Class		Region		Area	
		Male	Female	-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Ex-Dublin	Urban	Rural
<i>Base:</i>	695	376	319	125	244	194	97	355	340	203	492	284	182
	%	%	%	%	%	%	%	%	%	%	%	%	%
A valid NCT (National Car Test) cert means a car is completely safe	27	27	27	25	31	26	25	27	27	44	21	32	20
I would buy a second hand car based solely on the fact it has a valid NCT	27	27	27	24	30	24	28	25	28	40	22	31	20
The NCT is the same as having a full service	20	20	19	14	24	21	17	20	20	35	14	25	20
I don't need to get my car serviced between NCTs	17	19	15	14	21	18	13	18	16	32	11	22	9
Any agreement	42	43	42	38	43	40	38	40	44	57	36	47	34

Influence of / confidence in the NCT appears much stronger among Dublin and urban motorists generally.



Summary & Conclusions

Summary & Conclusions

Car Servicing

- The most prominent prompt for servicing our cars is reaching prescribed mileage or time thresholds. 34% of motorists reference NCT as a prompt (either Pre – or Post). The pattern of prompts is largely consistent across the key demographic groups, albeit prompting via 'Pre- NCT' is higher among Dublin motorists.
- There is strong awareness of owner's legal responsibility to ensure their vehicle is kept in a safe and roadworthy condition at all times

Car Checks

- The general level of confidence in conducting the range of car checks appears high, albeit it does drop for checking the wear of tyres.
- The level of high confidence in conducting does drops sharply among women and in Dublin however – highlighting a likely need for education initiatives to be targeted on a gender and regional basis.
- Frequency of car checks appears generally strong. Checking of wear of tyres appears to occur much less frequently. Frequency of checks is again typically stronger amongst males. Little difference in levels of frequency of checks in / outside Dublin.

Summary & Conclusions

Tyres

- At least 16% of motorists have purchased second hand tyres with such purchasing peaking among younger motorists (21% of motorists under 34 years). 39% just relied on the advice of the seller when purchasing second hand tyres.
- About half of motorists are aware that most tyres have labels that provide performance information. The most likely recalled information on tyre labels is 'Grip from tyre in wet conditions'.
- Usage of performance labels when purchasing tyres is modest – only 15% of motorists have done so; and this declines to only 6% of female motorists.
- Price and grip in wet conditions are the most influential features when purchasing tyres. The influence of features in tyre purchase is typically stronger among male motorists. Price is a much stronger influence among younger and rural motorists.

Summary & Conclusions

Second hand cars and NCT

- 69% of motorists have purchased a second hand car within the last 10 years. (57% within the last 5 years) with most recent purchasing (within past 2 years) peaking significantly among young motorists.
- 62% of second hand car purchases sought independent advice from a qualified mechanic and 46% sought a valid NCT cert.
- Seeking a valid NCT cert before purchase is more likely among younger purchasers.
- At least 1 in 4 motorists agree that a valid NCT cert means a car is completely safe. In general, the influence of / confidence in the NCT appears much stronger among Dublin and urban motorists: they are far more likely to agree that *'I would buy a second hand car based solely on the fact it has a valid NCT'*.



THANK YOU

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