

# Young People and Driving

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# Contents

<b>1 Executive Summary .....</b>	<b>2</b>
<b>2 Background and Methodology .....</b>	<b>5</b>
2.1 Background.....	5
2.2 Methodology .....	5
<b>3 Current Driving Behaviours .....</b>	<b>7</b>
3.1 Understanding driving habits .....	7
3.2 Vehicle and licence ownership .....	7
3.3 Driving habits.....	9
<b>4 Future Driving Habits.....</b>	<b>13</b>
4.1 Likelihood of driving in 2035.....	13
4.2 Reasons for the likelihood of driving in 2035 .....	14
<b>5 Views on Environmental Interventions .....</b>	<b>16</b>
5.1 Willingness to reduce one's carbon footprint .....	16
5.2 Electric vehicles .....	19
5.3 Environmental interventions.....	21
<b>6 Views on Automation in Driving .....</b>	<b>24</b>
6.1 Views towards automated driving .....	24
6.2 Reasons for negative views .....	24
<b>7 Conclusions .....</b>	<b>28</b>
<b>Appendix A .....</b>	<b>30</b>
Guide to Statistical Reliability.....	30
Technical note.....	30
<b>Appendix B .....</b>	<b>32</b>
Questionnaire.....	32
<b>Appendix C .....</b>	<b>40</b>
Our Standards and Accreditations.....	40

## List of figures

Figure 3.1: Vehicle ownership.....	7
Figure 3.2: Driving licence ownership .....	8
Figure 3.3: Frequency of driving.....	9
Figure 3.4: Why make regular journeys by car or van? .....	10
Figure 3.5: Ever taken a driving test .....	10
Figure 3.6: Reasons for not taking a test .....	11
Figure 4.1: Likelihood of driving in 2035 .....	13
Figure 4.2: Reasons or likelihood of driving in 2035.....	14
Figure 5.1: Willingness to reduce one's carbon footprint .....	17
Figure 5.2: Feelings about electric vehicles.....	19
Figure 5.3: Reasons for negative views.....	20
Figure 5.4: Ever consider buying/leasing an EV in the future .....	20
Figure 5.5: Environmental interventions .....	21
Figure 5.6: Future expectations .....	22
Figure 6.1: Views towards automated driving.....	24
Figure 6.2: Reasons for negatives views – partially automated driving.....	25
Figure 6.3: Reasons for negatives views – completely automated driving.....	26

## List of tables

Table 5.1: Willingness of subgroups to reduce carbon footprint .....	18
Table A.1: Sampling tolerances .....	30

# 1

## **Executive Summary**

# 1 Executive Summary

In recent years, the media have speculated about the extent to which younger people are abandoning the idea of car ownership. However, this survey shows that the overwhelming majority of young people aged 17–24 expect to be driving a car or van regularly by 2035. Aside from those unable to drive because of a disability or health condition, over 8 in 10 (85%) in this age group think it is certain or likely to happen that they will be driving at least once a week in 2035. This is a significant increase on the 56% of young people who *currently* drive a car or van regularly.

Among those in this age group who are yet to take a driving test, the most common reasons given are the perceived high costs of driving lessons (33%) and buying, leasing, or hiring a car (26%). Other barriers include a lack of time (26%) and driving simply not being a priority for them at this moment in time (23%). Concern about the environmental impacts of driving is only selected as a barrier by 8% of those yet to take a driving test.

Many participants do not drive regularly at the moment despite having a full or (mainly) provisional licence (56% regular drivers and 44% irregular or non-drivers); however, the majority of this group expect to start driving regularly by 2035. The most common reasons given include an expectation that their lifestyles will require them to drive and a belief that driving will be more convenient for them than either public transport or active travel (walking or cycling).

However, despite most young people expecting that they will be driving in the future, this is not to say that they do not anticipate changes in the automotive sector between now and 2035. Seven in 10 are positive about the idea of electric vehicles in principle (70%), and 8 in 10 say they are open to buying one in the future (55% yes, 25% maybe). In fact, 6 in 10 of those who are already regular drivers say they would be willing to switch to an electric or hybrid car in the next 5 years (61%).

Those aged 17–24 were also asked about their willingness to reduce their carbon footprint in a variety of other ways. There is already a high take-up for many sustainable transport options, particularly when it comes to walking or cycling for non-work-related short journeys (62% currently do this) and using public transport (61% currently do this). It is encouraging that among young people who do not yet do these things, the proportion who say they would be willing to make changes in the next 5 years is substantially higher than the proportion who would not be willing in each instance.

This age group are also open to Government interventions to reduce the environmental impact of driving. Six in 10 (60%) think that we should be expecting to drive less in the future; a similar proportion (58%) think that the Government should be taking steps over the next decade to reduce traffic (even if it negatively affects their own journeys). Four in 10 current drivers say they have already cut down on the car journeys they make (40%); a further 4 in 10 say they would be willing to do this over the next 5 years (40%).

More than half are supportive of the creation of low-traffic neighbourhoods (LTNs) (61%), investment to improve cycling infrastructure (61%), and the introduction of clean air zones (57%), interventions that have not been introduced without controversy. Congestion charging is a slightly more divisive concept, but even here support outweighs opposition by almost 2 to 1 (48% vs 26%). On personal actions to improve air quality, a high proportion of current drivers say they already turn their car engines off when parked or waiting (70%), with a further 18% willing to start doing this over the next 5 years.

Finally, those aged 17–24 are broadly comfortable with the growth in *partially* automated driving technologies (52% support them, with only 19% opposing them); however, there is more of a split in opinion around the concept of *completely* automated driving (37% support it, with 35% opposing it). The top concerns are a loss of driver control, an expectation that drivers will become lazy and not pay attention, concern about traffic collisions, and a perceived overreliance on technology.

# 2

## **Background and Methodology**



## 2 Background and Methodology

### 2.1 Background

In 2002, the RAC Foundation undertook a study entitled 'Motoring towards 2050', exploring how drivers felt about the future of motoring. A survey of 500 drivers was commissioned as part of the study. The survey covered a range of topics, including questions that asked participants to make predictions about the future of motoring in 2020. Twenty years on from the initial report, the RAC Foundation commissioned Ipsos to revisit some of the themes addressed in the survey, with a central objective to understand the importance young people place on cars and the extent to which:

- young people want or expect to be driving in the next 5–10 years;
- there are barriers for those who do not drive currently but would like to in the future;
- young people are concerned about the environmental impact of motoring and the changes they are willing to make to travel more sustainably (embracing electrification; adopting alternative, more sustainable modes of transport; or reducing their mobility entirely);
- young people support environmental interventions, both locally and nationally.

### 2.2 Methodology

The survey was conducted using the Ipsos Access Panel with fieldwork taking place between 3 and 22 November 2022. A total of 1,000 British adults aged 17–24 were surveyed, with quotas set on gender, age bands, working status, and region. Data were also weighted by gender, age, work status, and region to reflect the British population aged 17–24.

More detailed sample information, along with a guide to statistical reliability, can be found in Appendix A. The questionnaire can be found in Appendix B.

# 3

## **Current Driving Behaviours**

## 3 Current Driving Behaviours

### 3.1 Understanding driving habits

Participants were asked questions about their driving habits and driving licence status. The purpose of these questions was to understand their experience with driving at the time of taking the survey.

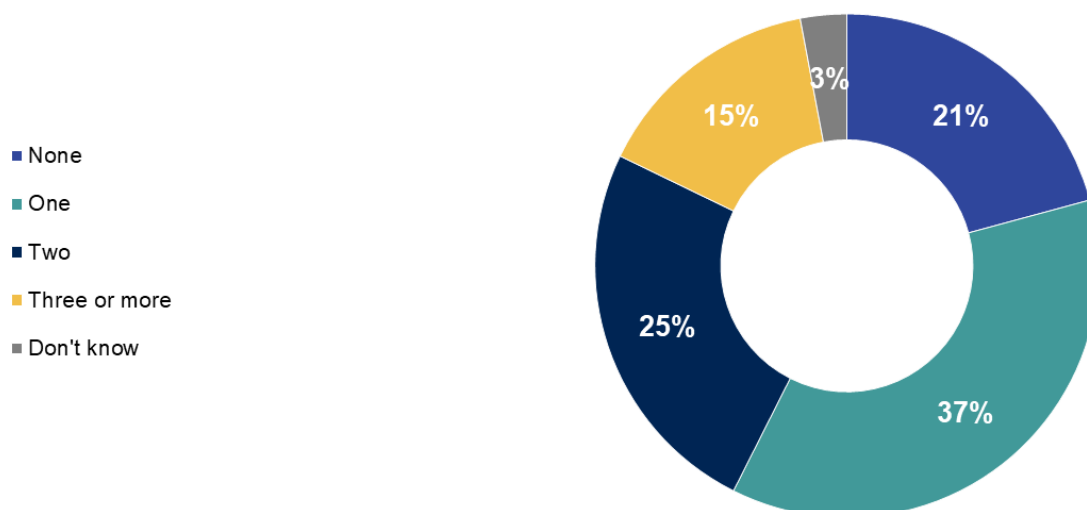
### 3.2 Vehicle and licence ownership

#### Vehicle ownership

Young British adults aged 17–24 who do not have a disability that prevents them from driving were asked how many vehicles they have ownership or continuous use of, including private or company cars. One in 5 (20%) have no vehicle to use continuously, while almost 2 in 5 (37%) say that they have access to 1 vehicle. A quarter (25%) have access to 2 vehicles, whereas 1 in 7 (15%) have access to 3 or more vehicles.

**Figure 3.1: Vehicle ownership**

*Q1. How many cars or vans does your household own or have continuous use of at present?*



Base: All who do not have a disability that prevents them from driving (855). Fieldwork dates: 3-22 November 2022

Source: Ipsos

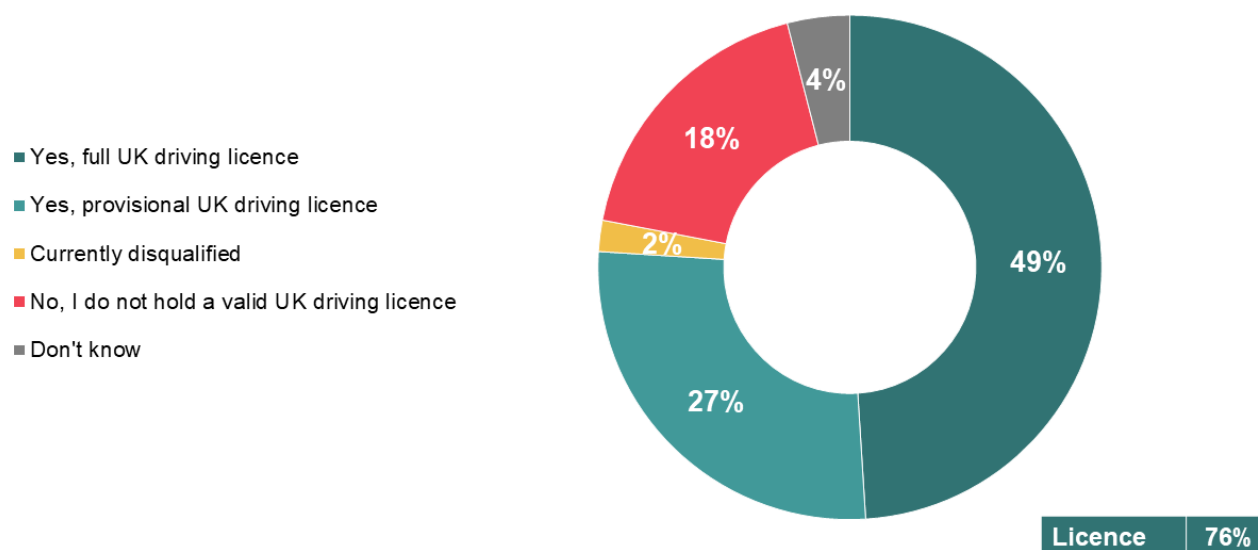
Those who are still studying are more likely to say that they have no vehicle to make use of (25%), while those who are in employment are more likely to have one vehicle (41%).

#### Driving licence ownership

The same group were then asked if they held a valid UK driving licence. Over three quarters of young adults aged 17–24 have some form of valid UK driving licence, either full (49%) or provisional (27%). Almost 1 in 5 (18%) have no licence while a minority are currently disqualified (2%).

## Figure 3.2: Driving licence ownership

Q2. Do you hold a valid UK car driving licence?



Base: All who do not have a disability that prevents them from driving (855). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Those more likely to hold a full UK driving licence include those aged 21–24 (65%) and those in employment (66%). The opposite is true for those who currently hold a provisional driving licence or no licence at all because they are more likely to be 17–20 (35% and 24% respectively) and students (31% and 25% respectively).

### 3.3 Driving habits

#### Frequency of driving

Participants with a full or provisional driving licence were asked approximately how often they make a journey in a car or van as a driver. Almost three quarters (73%) say they drive at least once a week.

**Figure 3.3: Frequency of driving**

Q3. Approximately how often do you make a journey in a car or van as a driver?



Base: All who have a driving licence (660). Fieldwork dates: 3-22 November 2022

Source: Ipsos

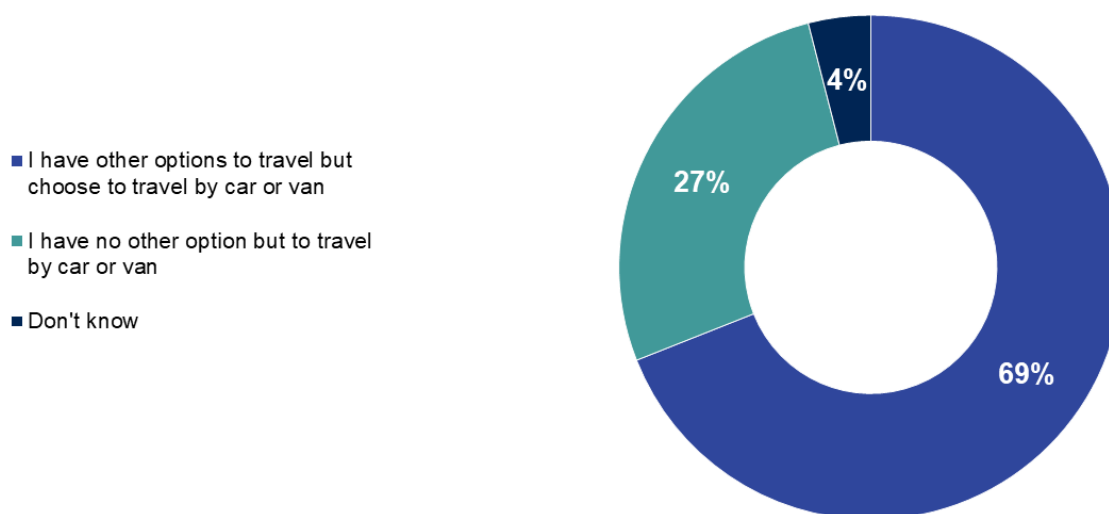
Frequent driving is especially prevalent among 21–24 year olds who are more likely to be driving 5 days a week or more (33% vs 23% of 17–20 year olds) and 3–4 days a week (23% vs 20% overall). Just over 1 in 10 (11%) of those with a UK full or provisional driving licence say they have never driven a vehicle before.

Among those with a full or provisional licence, the groups more likely to report driving at least once a week include men (81%), those aged 21–24 (78%), and those in employment (84%). Those more likely to have never driven include women (14%), those aged 17–20 (16%), those in education (15%), and those with a provisional licence only (29% vs 11% overall).

Regular drivers, defined as driving once a week or more, were asked a follow-up question asking why they make their regular journeys by car or van. Over two thirds (69%) say they have other travel options, but they choose to travel by car or van. Just over a quarter (27%) have no other choice but to travel by car or van for their regular journeys. The limited sample size at baseline for this question limits the amount of subgroup analysis that is possible.

### Figure 3.4: Why make regular journeys by car or van?

Q4. Thinking about the regular journeys you make most often by car or van, which of these apply?



Base: All regular drivers (501). Fieldwork dates: 3-22 November 2022

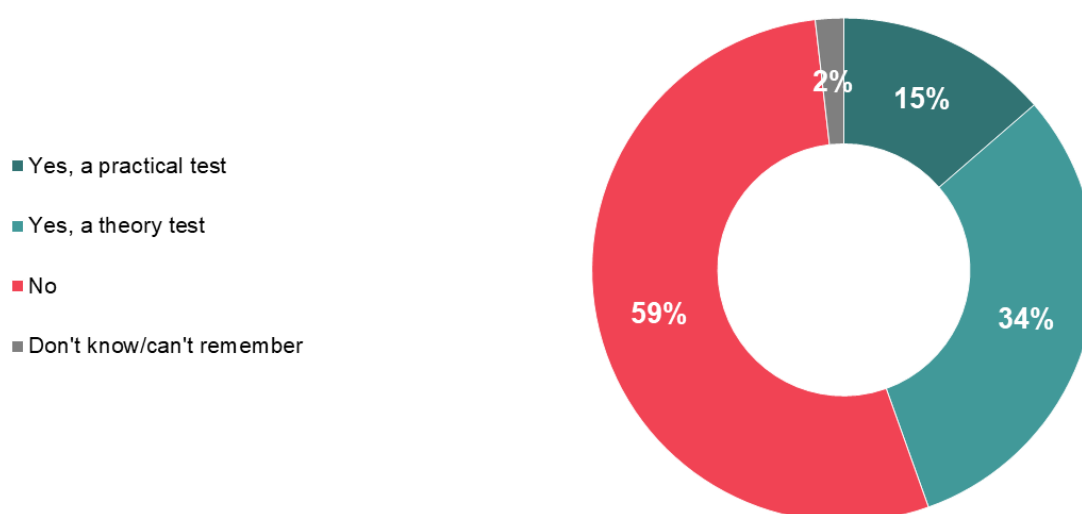
Source: Ipsos

### Non-drivers

Those who do *not* have a full driving licence were asked if they have ever taken a driving test before. Almost 2 in 5 (39%) say they have taken either a practical (15%) or theory (34%) test before. Almost 3 in 5 (59%) have never taken a driving test before.

### Figure 3.5: Ever taken a driving test

Q5. Have you ever taken a driving test before?



Base: All who do not have a full licence (373). Fieldwork dates: 3-22 November 2022

Source: Ipsos

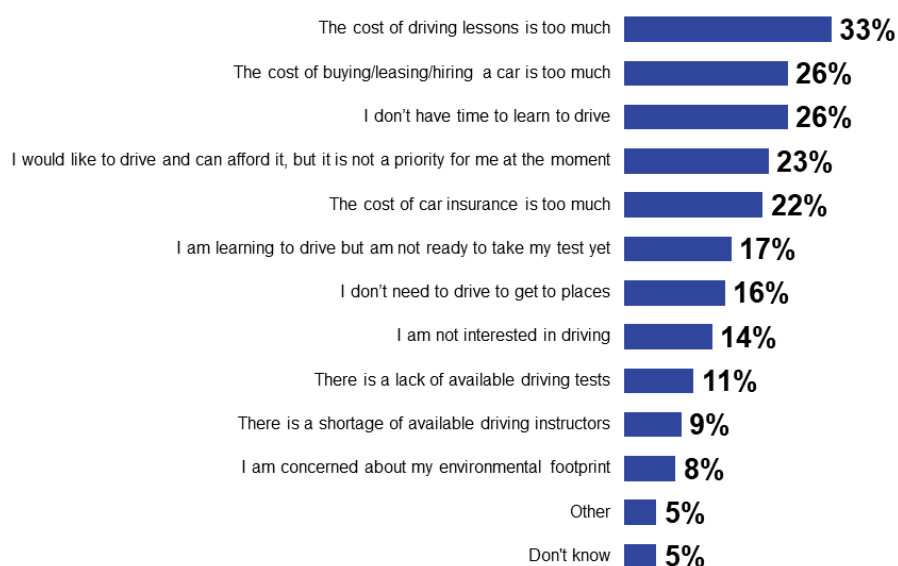
As expected, it is those in the younger age group of 17–20 who are less likely to have ever taken a driving test before (33%), compared to those aged 21–24 who are much more likely to have taken some form of driving test before (52%).

### Reasons for not taking a test

Those who have never taken a driving test before were asked to select from a list of reasons why they had not taken a test. Time and money were the main factors behind not taking a driving test to date. The cost of driving lessons being too much (33%), followed by the cost of buying or leasing a car (26%), and having the time to learn (26%) were the most cited reasons. Other reasons include driving not being a priority at the moment (23%), the cost of car insurance perceived as being too high (22%), and not being quite ready to take a driving test yet (17%).

**Figure 3.6: Reasons for not taking a test**

*Q6. You said that you have never taken a driving test. Which, if any, of the following reasons apply?*



Base: All who have never taken a driving test (215). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Women are more likely than average to cite cost as a barrier to taking a driving test, particularly the cost of lessons (41%) and owning or leasing a car (31%). Perhaps due to other commitments, those aged 17–20 are more likely than average to say that they simply do not have time to learn to drive (30%).

# 4

## **Future Driving Habits**



## 4 Future Driving Habits

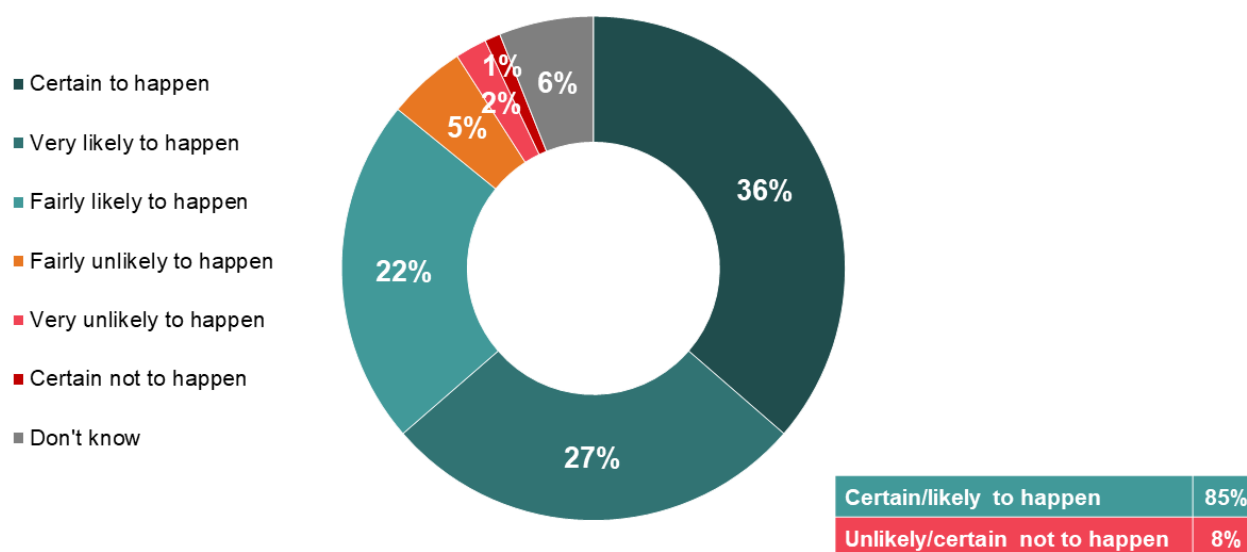
To gauge what role the car might play in young people's lives going forward, those without a disability that prevents them from driving were asked how likely or unlikely they think they are to be driving regularly in 2035. Regular driving was defined as at least once a week. The year 2035 was chosen to ensure that participants would be at least 30 years of age by this time. It is important to note that anticipated behaviour should not be treated as an accurate prediction of future driving prevalence; this survey was designed to gauge expectations at a point in time.

### 4.1 Likelihood of driving in 2035

Among those who do not have a disability preventing them from being able drive, over 4 in 5 (85%) 17–24-year-old Britons say it is either certain or likely that they will be driving regularly in 2035. Over one third think it is certain that they will be driving regularly in 2035, while just over a quarter (27%) think it is very likely and over 1 in 5 (22%) think it is fairly likely. Less than 1 in 10 (8%) think it is unlikely or certain that they will not be driving regularly in 2035, the majority of which only think it is fairly unlikely to happen (5%), while smaller proportions consider it to be very unlikely (2%) or certain not to happen (1%).

**Figure 4.1: Likelihood of driving in 2035**

Q7. How likely or unlikely do you think you are to be driving regularly in 2035?



Base: All who do not have a disability that prevents them from driving (855). Fieldwork dates: 3-22 November 2022

Source: Ipsos

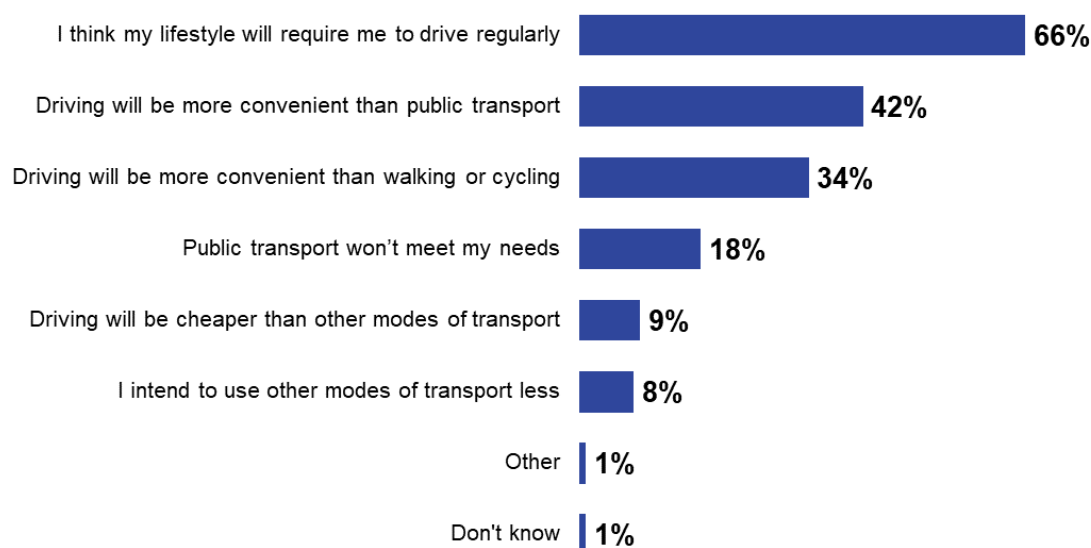
It is those in employment (90%) and those who already hold a full driving licence (92%) who are more likely to say it is certain or likely that they will be driving regularly in 2035 (vs 85% overall). When looking at regions across Great Britain, those living in Yorkshire and the Humber (95%) are also more likely to say it is certain or likely they will be regular drivers in 2035. The opposite can be said for those living in the North West (14% unlikely or certain not to happen) and those who are currently unemployed (17% vs 8% overall), although it is important to stress that among both groups, a strong majority still see it as certain or likely that they will be driving in 2035.

## 4.2 Reasons for the likelihood of driving in 2035

Participants were asked a targeted follow-up question based on their current driving habits and predicted driving habits in 2035. Among driving licence holders who do not drive regularly and think they will be driving regularly in 2035, the most common reasons given for this change are that their lifestyle will require them to drive regularly (66%) and that driving will be more convenient than either public transport (42%) or walking or cycling (34%).

**Figure 4.2: Reasons or likelihood of driving in 2035**

*Q10. You said that in 2035, you think that you will be driving regularly. Which, if any, of the following reasons apply?*



Base: All who do not currently drive regularly but think they will drive regularly by 2035 (133). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Among driving licence holders who drive regularly and **do not** think they will be driving regularly in 2035 (28 participants), the top reasons are the high costs of running or maintaining a vehicle (selected by 7 participants), intending to make regular journeys via walking or cycling (7 participants), and intending to use public transport more for regular journeys (also 7 participants).

Driving licence holders who do not currently drive and think they will not drive by 2035 (15 participants) cite as the top reasons for their decision concerns about the environmental impact of driving (selected by 6 participants), intention to use public transport instead of driving (6 participants), and being too nervous to drive (5 participants).

# 5

## **Views on Environmental Interventions**

## 5 Views on Environmental Interventions

Young adults aged 17–24 were asked several questions about any changes they were willing to make to travel more sustainably, including their views towards electrification of cars and reducing their dependency on cars.

### 5.1 Willingness to reduce one's carbon footprint

Young adults aged 17–24 were asked about their willingness to reduce their carbon footprint in a variety of ways. They were asked to indicate if they already did any of the examples provided to reduce their carbon footprint, and if not, whether they were willing to do so in the next 5 years.

All were asked about using public transport, walking or cycling for non-work-related short journeys, and using online tools as an alternative to face-to-face appointments or meetings. Those in work were also asked about walking or cycling to work. Those who drive at least once a week were also presented with a series of statements about specific ways in which they could reduce their carbon footprint.

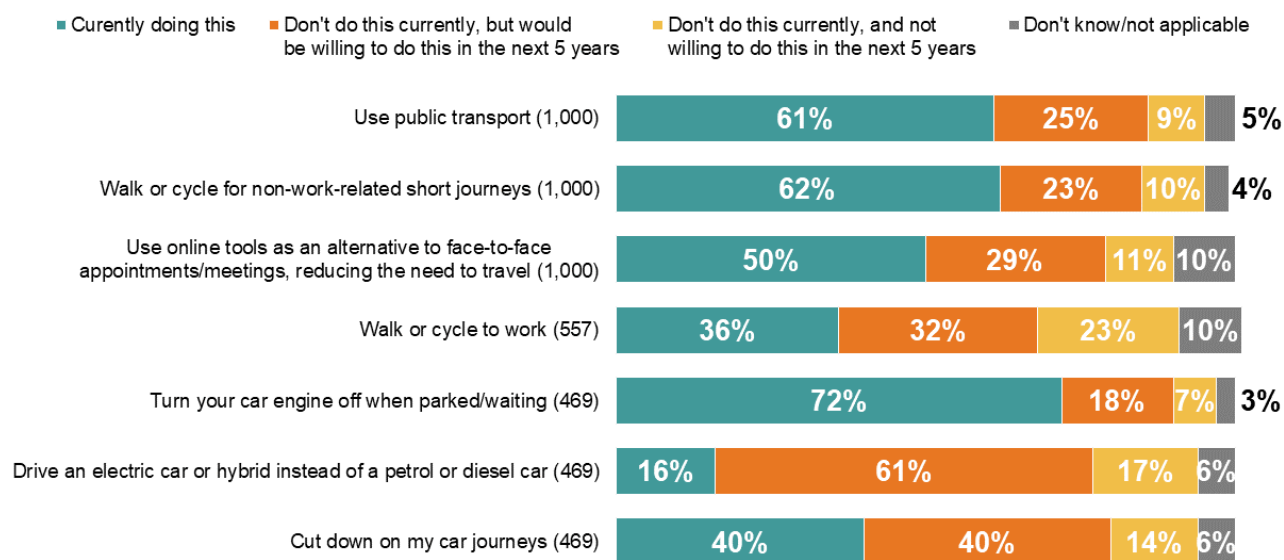
For the examples provided to all young adults aged 17–24, at least half said that they currently do all of them, although more say they walk or cycle for non-work-related journeys (62%) and use public transport (61%) than using online platforms for meetings or appointments (50%). A further 3 in 10 young adults are willing to attend meetings or appointments virtually in the next 5 years though (29%), followed by starting to use public transport (25%), and walking and cycling for shorter journeys (23%).

Over a third (36%) of young adults who work say they currently walk or cycle to work. Slightly fewer (32%) say they do not currently do this but would be willing to in the next 5 years, while less than a quarter (23%) do not currently do this and would be unwilling to do so in the next 5 years.

Of the statements presented to those with at least 1 vehicle in their household, who drive at least once a week, 72% say they currently turn off their car engine when parked. A smaller proportion say they are already cutting down on their car journeys (40%) and even fewer say they currently drive an electric or hybrid car (16%). Young adults reported being most willing to drive an electric or hybrid car in the next 5 years (61%), followed by cutting down on their car journeys (40%).

## Figure 5.1: Willingness to reduce one's carbon footprint

Q11. Are you willing to do the following to reduce your carbon footprint/environmental impact in the next 5 years?



Base: All respondents (see above). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Table 5.1 outlines which subgroups are more likely to say they currently do, will do in the next 5 years, or will not do each of the actions to reduce their carbon footprint in the next 5 years.

**Table 5.1: Willingness of subgroups to reduce carbon footprint**

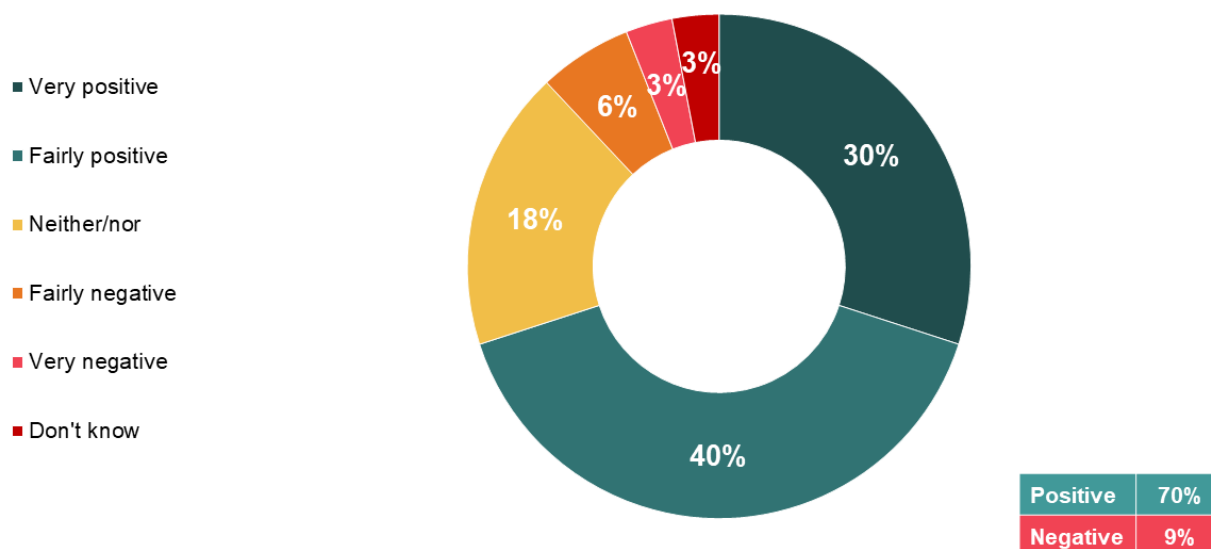
More likely to ...	Currently do this	Do not do this currently but would be willing to do this in the next 5 years	Do not do this currently and are not willing to do this in the next 5 years
Use public transport (1,000)	Women (65%) 17–20 year olds (65%) Greater London residents (72%) Students (69%) Provisional licence holders (73%) No licence holders (80%) Irregular drivers (73%) Non-drivers (77%)	21–24 year olds (28%) Employed full-time (34%) Full driving licence holders (32%) Regular drivers (32%)	Men (12%) South West residents (17%) Employed (12%) Full driving licence holders (14%) Regular drivers (13%)
Walk or cycle for non-work-related short journeys (e.g. shopping) (1,000)	17–20 year olds (69%) No disability or health condition (64%) South East residents (72%) Students (71%) Provisional licence holders (69%) No licence holders (82%) Irregular drivers (73%) Non-drivers (77%)	21–24 year olds (29%) Employed full-time (35%) Full driving licence holders (30%) Regular drivers (30%)	Men (13%) Disability or health condition (17%) West Midlands residents (19%)
Use online tools as an alternative to face-to-face appointments and meetings, reducing the need to travel (1,000)	North East residents (63%) Employed full-time (56%) Irregular drivers (64%)	South East residents (37%) Employed part-time (38%) Regular drivers (33%)	Men (15%) Disability or health condition (17%)
Walk or cycle to work (557)	17–20 year olds (42%) No licence holders (70%) Non-drivers (55%)	Full driving licence holders (36%) Regular drivers (38%)	21–24 year olds (25%) Full licence holders (27%) Regular drivers (26%)
Turn car engine off when parked or waiting (469)	Full licence holders (75%)	East Midlands residents (37%) Employed (21%)	–
Drive an electric car or hybrid instead of a petrol or diesel car (469)	Men (21%) Employed full-time (29%) Full driving licence holders (18%)	Women (67%) Employed part-time (70%)	–
Cut down on their car journeys (469)	Yorkshire and the Humber residents (55%)	Employed (43%)	–

## 5.2 Electric vehicles

All British adults aged 17–24 who do not have a disability that prevents them from driving were asked how positive or negative they feel about electric vehicles (EVs). Overall, 7 in 10 (70%) are positive towards EVs compared to the 1 in 10 (9%) who are negative. Just under 1 in 5 (18%) have no opinion either way.

**Figure 5.2: Feelings about electric vehicles**

*Q14. How positive or negative do you feel about electric vehicles?*



Base: All who do not have a disability that prevents them from driving (855). Fieldwork dates: 3-22 November 2022

Source: Ipsos

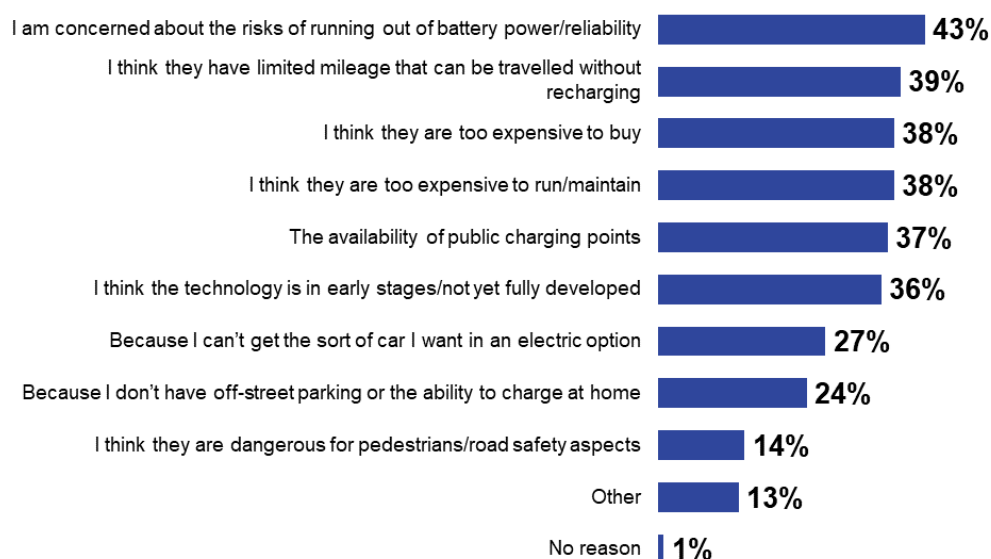
Those who do not drive now but think they will in the future are more likely to be positive about EVs (78%).

Conversely, men are more likely to be negative towards EVs (12% vs 9% overall), as are those who have a negative outlook towards automated driving (15% partial automated driving, 14% complete automated driving).

Those who responded negatively were asked to select from a list of reasons as to why they did so. The main factors cited included concerns about batteries and/or reliability (43%), limited mileage (39%), and the price of buying (38%) and running or maintaining an EV (38%).

### Figure 5.3: Reasons for negative views

Q15. Why do you say this?



Base: All who answered negatively (72). Fieldwork dates: 3-22 November 2022

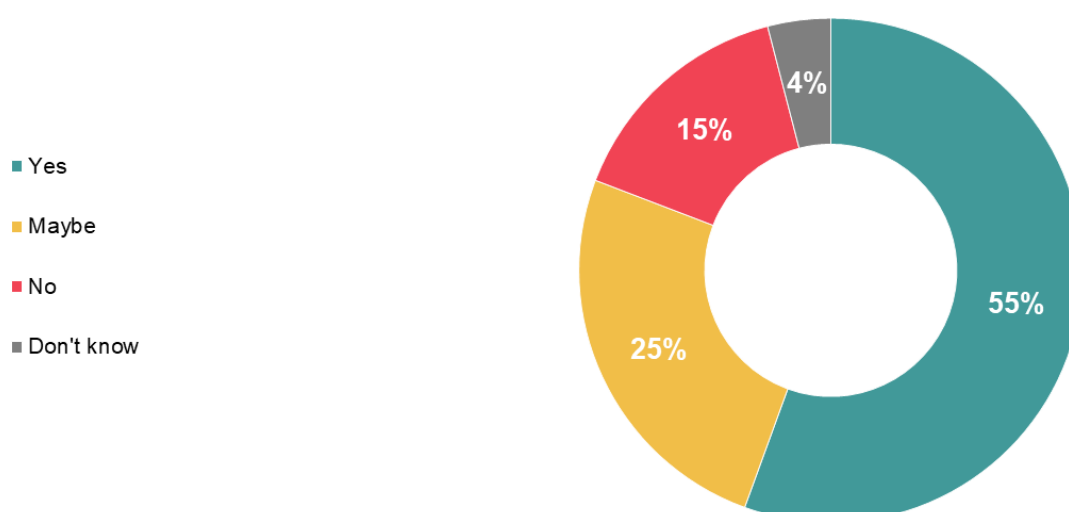
Source: Ipsos

Those who would not consider buying an EV in the future are more likely to refer to the technology as not yet being fully developed (48% vs 36% overall).

Overall, 55% of young adults aged 17–24 (who do not have a disability that prevents them from driving) say they would consider buying or leasing an EV in the future.

### Figure 5.4: Ever consider buying/leasing an EV in the future

Q16. Would you ever consider buying or leasing an electric car in future?



Base: All who do not have a disability that prevents them from driving (855). Fieldwork dates: 3-22 November 2022

Source: Ipsos



The proportion saying they would consider buying or leasing an EV was particularly high among 21–24 year olds (62%), those who are employed (59%), current regular drivers (61%), and those who expect to drive regularly in the future (63%).

Males are less willing to consider buying or leasing an EV (18% say they would not vs 15% overall). Those aged 17–20 were more likely than average to answer 'maybe' (29% 'maybe' vs 20% of those aged 21–24).

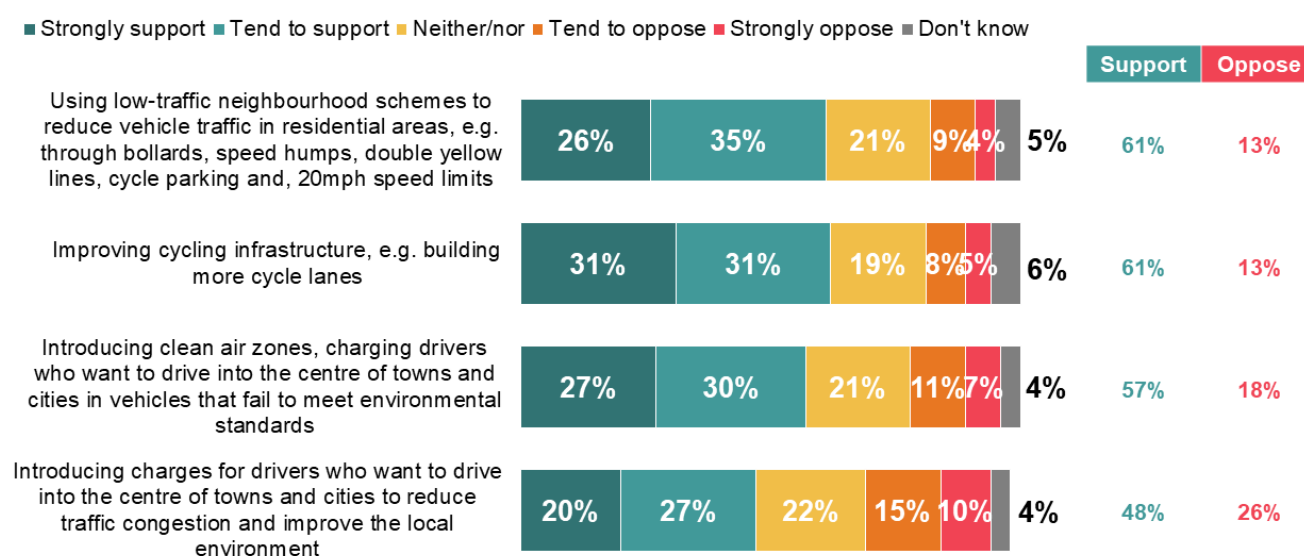
### 5.3 Environmental interventions

All participants aged 17–24 were asked to what extent they support or oppose various environmental interventions. Most respondents (61%) are in favour of LTN schemes, with smaller proportions opposing these (13%). A similar proportion (61%) are in favour of improving cycling infrastructure while more than 1 in 10 (13%) oppose it.

Regarding the introduction of clean air zones, almost 3 in 5 (57%) support these schemes while less than 1 in 5 (18%) oppose them. Less than half (48%) support charges for drivers who want to drive into the centre of towns and cities, while one quarter (26%) oppose the idea.

**Figure 5.5: Environmental interventions**

Q17. To what extent do you support or oppose the following...?



Base: All respondents (1,000). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Regular drivers (64%) are more likely to support LTNs. Men and those living in the West Midlands are more likely to oppose them (16% and 21% respectively vs 13% overall). The higher levels of opposition in this region could be linked to recent LTNs introduced in Birmingham and the West Midlands.<sup>1</sup>

<sup>1</sup>BBC News (6 April 2022). *Kings Heath Low Traffic Scheme To Be Made Permanent*. Accessed 12 February 2023 at [www.bbc.co.uk/news/uk-england-birmingham-60985170](https://www.bbc.co.uk/news/uk-england-birmingham-60985170)

Those without a driving licence are more likely to be in favour of improving cycling infrastructure (77% vs 61% overall). Those in the South West are more likely to oppose these improvements (21% vs 13% overall).

In terms of implementing charges for drivers in towns and cities, those who drive regularly now and will also drive regularly in 2035 are more likely than average to support this policy (51% vs 48%).

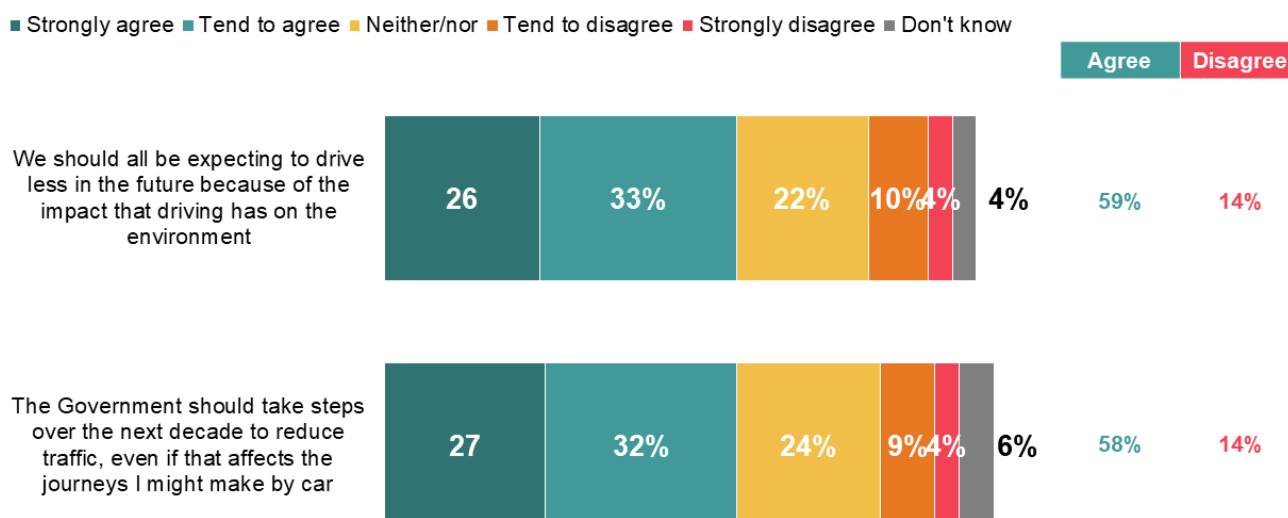
Those in employment are more likely to be supportive of clean air zones (61% vs 57% overall), with males more likely to oppose these interventions (21% vs 18% overall).

## 5.4 Future expectations

Those aged 17–24 who do not have a disability that prevents them from driving were asked to what extent they agreed or disagreed with statements regarding driving in the future.

**Figure 5.6: Future expectations**

Q18. To what extent do you agree or disagree with the following statements?



Base: All who do not have a disability that prevents them from driving (855). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Nearly 3 in 5 agree that we should all be expecting to drive less in the future because of the impact that driving has on the environment (59%). Levels of agreement are higher among those who are positive towards partially automated vehicles, completely automated vehicles, and EVs (68%, 70%, and 70% respectively). Those with a full driving licence are also more likely to agree with this statement (63%).

A similar proportion of respondents also agree that the Government should take steps over the next decade to reduce traffic (58%); again, levels of agreement are higher than average among those who are positive towards partially automated vehicles, completely automated vehicles, and EVs (68%, 69%, and 67% respectively).

# 6

## **Views on Automation in Driving**

## 6 Views on Automation in Driving

Young adults aged 17–24 were asked a series of questions about automated driving to understand their attitudes towards technological advancements and indicate what kind of role this may have in their future transport habits. Those who responded negatively when asked about automation in driving were also asked a follow-up question to better understand their views.

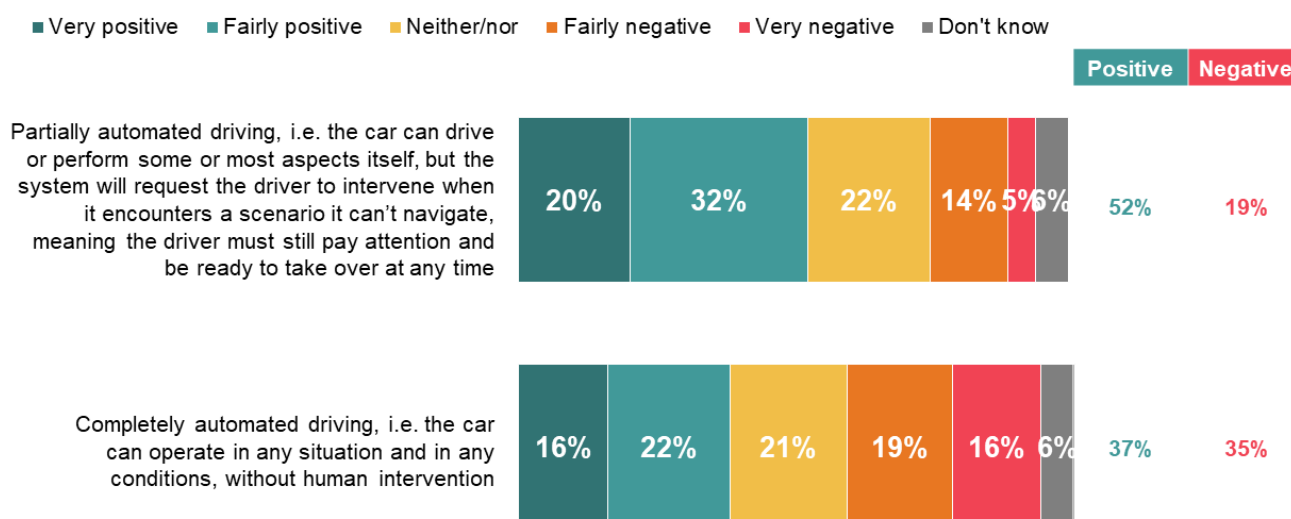
### 6.1 Views towards automated driving

Young adults were asked their views about both partially and completely automated driving. More than half say they are positive towards partially automated driving (52%), with 1 in 5 (20%) very positive and just under a third (32%) fairly positive. Less than 1 in 5 (19%) say they are negative towards the idea of partially automated driving, while 22% say they are neither positive nor negative about the concept.

Opinions towards completely automated driving are split, with 37% positive towards the idea compared to 35% who are negative. Over 1 in 5 (21%) have no opinion either way.

**Figure 6.1: Views towards automated driving**

Q12. How positive or negative do you feel about the following...?



Base: All respondents (1,000). Fieldwork dates: 3-22 November 2022

Source: Ipsos

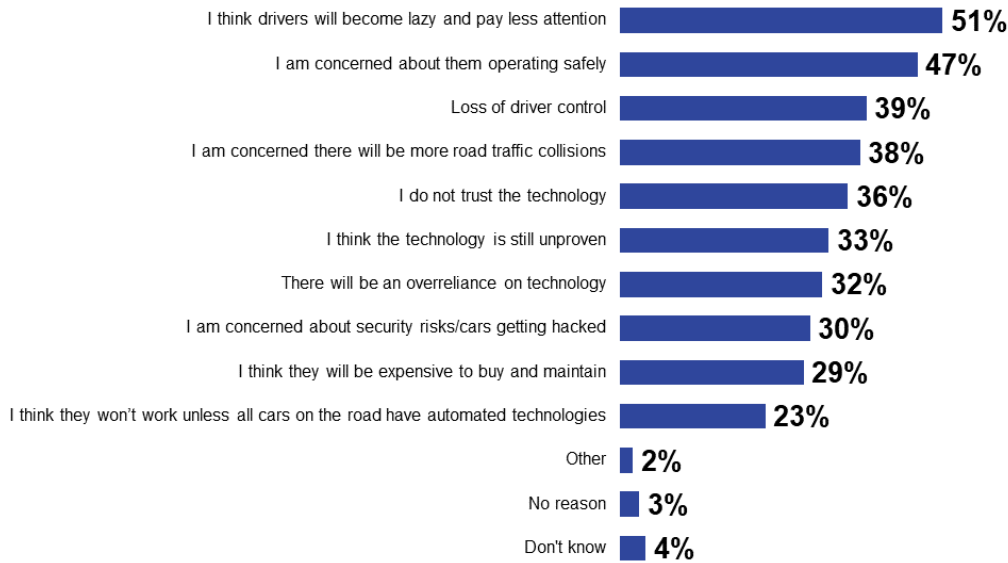
Men are more positive than women when it comes to both partially and completely automated driving (59% vs 47% for partially automated driving, 46% vs 30% for completely automated driving). The same is true of those in employment (60% partial, 44% complete) and current regular drivers (56% partial, 42% complete).

### 6.2 Reasons for negative views

Those who responded negatively when asked about partial automation were asked a follow-up question to gauge their driving view.

**Figure 6.2: Reasons for negatives views – partially automated driving**

Q13. Why do you say you are negative about...?  
PARTIALLY AUTOMATED DRIVING



Base: All who answered negatively (179). Fieldwork dates: 3-22 November 2022

Source: Ipsos

More than half (51%) say they are negative towards partially automated driving because it makes drivers lazy. Slightly fewer (47%) say they are concerned about partially automated vehicles operating safely when on the roads and 39% are concerned about loss of driver control. Smaller proportions feel negative towards partially automated driving because the vehicles are expensive to buy and maintain (29%), as well as concerns about partially automated vehicles not working unless all cars on the road have automated technologies (23%).

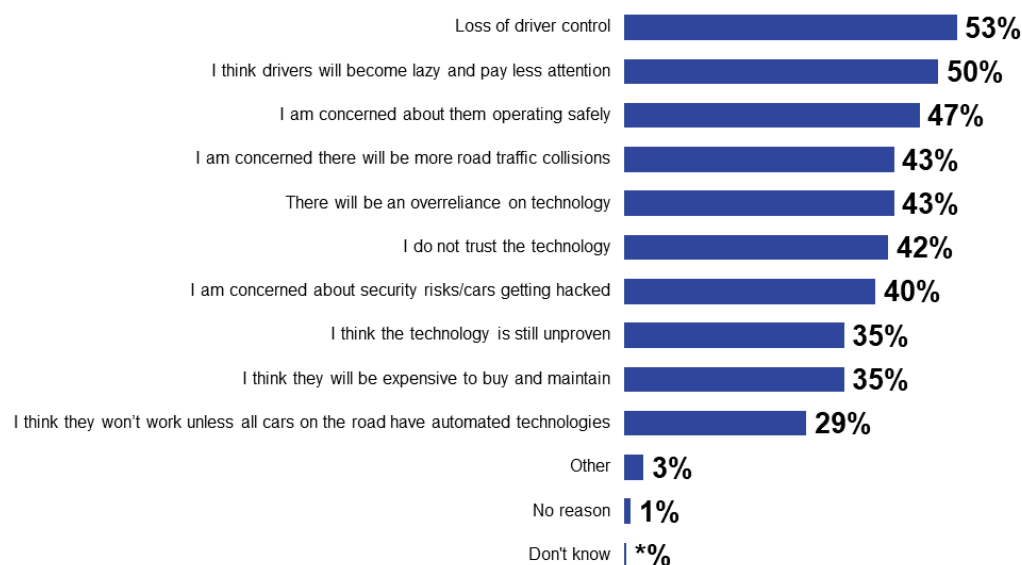
Women are more likely than men to cite several reasons when it comes to why they have a negative view of partially automated driving, including:

- drivers becoming lazy and paying less attention (59% vs 39%);
- concerns about partially automated vehicles operating safely (57% vs 33%);
- concerns of more traffic collisions (50% vs 20%);
- no trust in the technology (44% vs 23%);
- overreliance on technology (40% vs 20%).

When asked to expand on why they responded negatively to completely automated vehicles, more than half say it is down to concerns around a loss of driver control (53%) and slightly fewer (50%) say they think completely automated vehicles will make drivers lazy and make them pay less attention. There are also concerns about completely automated vehicles operating safely (47%). Fewer cited other reasons such as the expense of buying and maintaining an automated vehicle (35%), the technology being unproven (35%), and completely automated vehicles not working unless all cars on the road have automated technologies (29%).

**Figure 6.3: Reasons for negatives views – completely automated driving**

Q13. Why do you say you are negative about...?  
COMPLETELY AUTOMATED DRIVING



Base: All who answered negatively (336). Fieldwork dates: 3-22 November 2022

Source: Ipsos

Like partially automated driving, it is women who are more likely to cite several concerns than men, including:

- loss of driver control (64% vs 34%);
- drivers becoming lazy and paying less attention (59% vs 34%);
- concerns around completely automated vehicles operating safely (55% vs 33%);
- no trust in the technology (53% vs 23%);
- concerns of more traffic collisions (49% vs 32%).

# 7

## Conclusions

## 7 Conclusions

Despite media speculation around the diminished importance given to driving by young people, the car seemingly has a very important role to play in this group's future transport behaviours, as most 17–24 year olds expect to be driving regularly, at least once a week, by 2035 (85%). Even as much of daily life moves online, such as working from home, most young people who think they will be driving regularly in the future think their lifestyle will require it (66%) and that it is more convenient than public transport (42%) and cycling (34%).

Although driving is an important factor for most young people going forward, it is not quite for everyone as almost 3 in 5 (59%) of those who do not have a full UK driving licence say they have never taken a test before. Perhaps because of the current economic situation in the UK, cost is the most cited reason for not taking a driving test to date (33% cost of driving lessons; 26% cost of owning a car), followed by a lack of time (26%).

In terms of environmental attitudes and behaviours, young people are open to, or are already doing, a number of carbon footprint-reducing actions such as walking, cycling, and using public transport. EVs are also of interest to the younger generation with 7 in 10 (70%) saying they have a positive view on these types of vehicles in principle, with over half (55%) saying that they would consider buying or leasing one in the future. A number of Government interventions that help tackle climate change and lower carbon emissions are popular with the young generation; most are in support of things like LTNs, investment in cycling infrastructure, and clean air zones.

Some forms of technology and driving sit well with young people, namely partially automated driving (52% positive). However, young people are cautious when it comes to relinquishing their control of a vehicle entirely (37% positive and 35% negative towards completely automated driving). The main concerns with fully automated driving include drivers becoming lazy (51%), safe operation (47%), and loss of driver control (39%). These findings suggest that while young people are open to the introduction of further technologies to enhance the driving experience, they are not yet willing to place their trust in it completely.



# **Appendix A**

## **Guide to Statistical Reliability**

# Appendix A

## Guide to Statistical Reliability

Participants in the research are only samples of the total population, so we cannot be certain that the figures obtained are exactly those we would have found if every single person in Great Britain aged 17–24 had been surveyed. However, we can predict the variation between the sample results and the true values from knowing the size of the samples on which the results are based and the number of times that a particular answer is given.

It is important to note that margins of error relate only to samples that have been selected using strict random probability sampling methods. However, in practice it is reasonable to assume that these calculations provide a good indication of the confidence intervals relating to this survey and the sampling approach used.

Table A.1 illustrates the predicted ranges for different sample sizes and percentage results at what is called the 95% confidence interval.

**Table A.1: Sampling tolerances**

Size of sample on which the survey results are based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90% ±	30% or 70% ±	50% ±
1,000 (all participants)	1.9%	2.8%	3.1%
885 (all participants who do not have a disability that prevents them from driving)	2.0%	3.1%	3.4%

For example, with a sample of 1,000 where 50% give a particular answer, the chances are 19 in 20 (95%) that the true value, which would have been obtained if the whole population had been surveyed, will fall within the range of  $\pm 3.1$  percentage points from the sample result, i.e. between 46.9% and 53.1%.

Unless otherwise stated, all subgroup differences included in the report represent statistically significant differences.

## Technical note

Data points that appear as asterisks (\*) denote a figure of less than 0.5% but greater than zero.

Throughout this report an asterisk is displayed next to any mention of the subgroup ‘those who mainly travel for business purposes’, as the base is lower than 100. These findings should be treated as indicative.

Where percentages do not add up to 100, this is due to computer rounding, multiple responses, or the exclusion of ‘don’t know’ categories.

Where percentages of combinations are shown (e.g. ‘Agree’), these reflect the combined raw numbers; thus, they may not be the same as the sum of the individual percentages (e.g. ‘Strongly agree’ and ‘Tend to agree’).

# **Appendix B**

## **Questionnaire**

# Appendix B

## Questionnaire

### RAC Foundation – Young People and Driving

N = 1,000 British adults aged 17–24

**DEMOGRAPHICS – AGE, GENDER, WORK STATUS, URBAN/RURAL**

**ASK ALL**

**Q0.** Do you personally have a disability or long-term health condition that completely prevents you from being able to drive a car or not?

**SINGLE CODE**

1. Yes, I do **SKIP TO Q11**
2. No, I do not
3. Prefer not to say

**SHOW ALL WHO DO NOT HAVE A DISABILITY WHICH PREVENTS THEM FROM DRIVING (Q0=2 AND 3)**

First, we would like to ask you some questions about your driving habits.

**ASK ALL WHO DO NOT HAVE A DISABILITY WHICH PREVENTS THEM FROM DRIVING (Q0=2 AND 3)**

**Q1** How many cars or vans does your household own or have continuous use of at present?

*Please include company cars if available for your private use. Please also include any broken-down cars or vans which may be in use within the next month.*

**SINGLE CODE**

*Please select one option only*

1. None
2. 1
3. 2
4. 3 or more
5. Don't know

**ASK ALL WHO DO NOT HAVE A DISABILITY WHICH PREVENTS THEM FROM DRIVING (Q0=2 AND 3)**

**Q2.** Do you hold a valid UK car driving licence? This can be a manual driving licence or an automatic only licence. This also includes international permits or other foreign licences valid in the UK.

**SINGLE CODE**

*Please select one option only*

1. Yes, full UK driving licence
2. Yes, provisional UK driving licence
3. Currently disqualified
4. No, I do not hold a valid UK driving licence
5. Don't know

**ASK ALL WHO HAVE A DRIVING LICENCE (CODES 1 AND 2 AT Q2)**

**Q3.** Approximately how often do you make a journey in a car or van as a driver?

*If you are currently taking driving lessons, please include these in your answer.*

**SINGLE CODE**

*Please select one option only*

1. 5 days a week or more
2. 3–4 days a week
3. 2 days a week
4. Once a week
5. Once a fortnight
6. At least once a month
7. At least once every 3 months
8. At least once a year
9. Not driven in the last 12 months
10. Never driven

**ASK ALL REGULAR DRIVERS (CODES 1–4 AT Q3)**

**Q4.** Thinking about the regular journeys you make most often by car or van, which of these apply?

**SINGLE CODE**

*Please select one option only*

1. I have other options to travel but choose to travel by car or van
2. I have no other option but to travel by car or van
3. Don't know/not sure

**ASK ALL WHO DO NOT HAVE A FULL LICENCE (CODE 2 OR 4 AT Q2)**

**Q5.** Have you ever taken a driving test before?

**MULTICODE**

*Please select all that apply*

1. Yes, a practical test
2. Yes, a theory test
3. No **(EXCLUSIVE)**
4. Don't know/can't remember **(EXCLUSIVE)**

**ASK ALL WHO HAVE NEVER TAKEN A DRIVING TEST (CODE 3 AT Q4)**

**Q6.** You said that you have never taken a driving test. Which, if any, of the following reasons apply?

**MULTICODE**

*Please select all that apply*

**RANDOMISE 1–11**

1. I don't need to drive to get to places
2. I would like to drive and can afford it, but it is not a priority for me at the moment
3. The cost of driving lessons is too much
4. The cost of buying/leasing/hiring a car is too much
5. The cost of car insurance is too much
6. I don't have time to learn to drive
7. I am concerned about my environmental footprint
8. There is a shortage of available driving instructors
9. There is a lack of available driving tests
10. I am not interested in driving
11. I am learning to drive but am not ready to take my test yet
12. Other: please specify **(OPEN TEXT BOX)**
13. Don't know **(EXCLUSIVE)**

**ASK ALL WHO DO NOT HAVE A DISABILITY WHICH PREVENTS THEM FROM DRIVING (Q0=2 AND 3)**

**Q7.** How likely or unlikely do you think you are to be driving regularly in 2035?

By regularly we mean about once a week or more, and by 'driving' we mean physically driving (steering, etc.) or being in the driving seat of a car or van at your disposal that might be highly automated or self-driving.

**SINGLE CODE, FORWARD/REVERSE 1–6**

*Please select one option only*

1. Certain to happen
2. Very likely to happen
3. Fairly likely to happen
4. Fairly unlikely to happen
5. Very unlikely to happen
6. Certain not to happen
7. Don't know

**ASK ALL REGULAR DRIVERS WHO THINK THEY WON'T BE DRIVING REGULARLY BY 2035 (CODES 1–4 AT Q3 AND CODES 4–6 AT Q7)**

**Q8.** You said that in 2035, you do not think that you will be driving regularly. Which, if any, of the following reasons apply?

As a reminder, by driving regularly we mean about once a week or more.

**MULTICODE**

*Please select all that apply*

**RANDOMISE 1–10**

1. I think the cost of buying/hiring a car or van will be too high
2. I think the cost of running/maintaining a car or van will be too high (e.g. fuel, insurance, MOT)
3. I think I will be able to get lifts from family/friends
4. I will be reducing my environmental impact
5. I won't need to make the same journeys that I currently make by car (e.g. commute, school run)
6. I intend to use public transport for my regular journeys more
7. I intend to walk or cycle more for my regular journeys
8. Government policies which discourage driving in certain places
9. Parking restrictions will make driving too difficult
10. Online services mean I will not need to drive regularly (e.g. shopping, remote working)
11. Other, please specify (**OPEN TEXT BOX**)
12. Don't know (**EXCLUSIVE**)

**ASK ALL WHO DO NOT CURRENTLY DRIVE REGULARLY AND ALSO THINK THEY WON'T DRIVE REGULARLY BY 2035 (CODES 5–10 AT Q3 AND CODES 4–6 AT Q7)**

**Q9.** You said that in 2035, you do not think that you will be driving regularly. Which, if any, of the following reasons apply?

As a reminder, by driving regularly we mean about once a week or more.

**MULTICODE**

*Please select all that apply*

**RANDOMISE 1–10**

1. I don't think I will need to drive to get to places
2. I intend to use public transport for my regular journeys, instead of driving
3. I intend to walk or cycle for my regular journeys, instead of driving
4. I think my lifestyle will not require me to drive regularly
5. Online services mean I will not need to drive regularly (e.g. shopping, remote working)
6. The cost of buying/hiring a car/van will be too high
7. The cost of running/maintaining a car/van will be too high (e.g. fuel, insurance, MOT)
8. I am concerned about the environmental impact of driving
9. I think I will be too nervous to drive
10. I think I will be able to get lifts from family/friends
11. Other: please specify (**OPEN TEXT BOX**)
12. Don't know (**EXCLUSIVE**)

**ASK ALL WHO DON'T CURRENTLY DRIVE REGULARLY BUT THINK THEY WILL DRIVE REGULARLY BY 2035 (CODES 5–10 AT Q3 CODES 1–3 AT Q7)**

**Q10.** You said that in 2035, you think that you will be driving regularly. Which, if any, of the following reasons apply?

As a reminder, by driving regularly we mean about once a week or more.

**MULTICODE**

*Please select all that apply*

**RANDOMISE 1–6**

1. I think my lifestyle will require me to drive regularly (e.g. shopping, family commitments, work)
2. I intend to use other modes of transport less
3. Driving will be more convenient than walking or cycling
4. Driving will be more convenient than public transport
5. Driving will be cheaper than other modes of transport
6. Public transport won't meet my needs
7. Other: please specify (**OPEN TEXT BOX**)
8. Don't know (**EXCLUSIVE**)

**ASK ALL**

**Q11.** Are you willing to do the following to reduce your carbon footprint/environmental impact in the next 5 years?  
(A carbon footprint is the total amount of greenhouse gases that are generated by our actions.)

Please indicate if you already do this to reduce your carbon footprint/environmental impact.

**SINGLE CODE FOR EACH ROW. PROGRESSIVE GRID**

*Please select one option only*

**ROWS**

1. Use public transport
2. Walk or cycle for non-work-related short journeys (e.g. shopping)
3. Use online tools as an alternative to face-to-face appointments/meetings, reducing the need to travel
4. **IF EMP01=1–3:** Walk or cycle to work
5. **IF Q3=1–4 AND Q1=2–5:** Turn your car engine off when parked/waiting
6. **IF Q3=1–4 AND Q1=2–5:** Drive an electric car or hybrid, instead of a petrol or diesel car
7. **IF Q3=1–4 AND Q1=2–5:** Cut down on my car journeys

**COLUMNS**

1. Currently do this
2. Don't do this currently, but would be willing to do this in the next 5 years
3. Don't do this currently, and not willing to do this in the next 5 years
4. Don't know/not applicable

**ASK ALL**

**Q12** How positive or negative do you feel about the following ...?

**SINGLE CODE PER ROW. PROGRESSIVE GRID.**

*Please select one option only for each statement*

**ROWS**

- A. **Partially automated driving**, i.e. the car can drive or perform some or most aspects itself, but the system will request the driver to intervene when it encounters a scenario it can't navigate, meaning the driver must still pay attention and be ready to take over at any time
- B. **Completely automated driving**, i.e. the car can operate in any situation and in any conditions, without human intervention

**COLUMNS**

1. Very positive
2. Fairly positive
3. Neither positive nor negative
4. Fairly negative
5. Very negative
6. Don't know

**ASK IF NEGATIVE TO EITHER (CODES 4 AND 5 AT Q12A OR Q12B)****Q13.** Why do you say you are negative about ...?**MULTI CODE, PROGRESSIVE GRID****SHOW ROWS CODED 4 AND 5 AT Q12****ROWS**

- A. Partially automated driving
- B. Completely automated driving

**RANDOMISE 1–10***Please select all that apply*

1. I am concerned there will be more road traffic collisions
2. I am concerned about them operating safely (e.g. vehicles' ability to safely complete a manoeuvre)
3. Loss of driver control
4. I think drivers will become lazy and pay less attention
5. There will be an overreliance on technology
6. I think the technology is still unproven
7. I think they will be expensive to buy and maintain
8. I do not trust the technology
9. I am concerned about security risks/cars getting hacked
10. I think they won't work unless all cars on the road have automated technologies
11. Other, please specify (**OPEN TEXT BOX, ANCHOR**)
12. No reason (**EXCLUSIVE**)
13. Don't know (**EXCLUSIVE**)

**ASK ALL WHO DO NOT HAVE A DISABILITY THAT PREVENTS THEM FROM DRIVING (Q0=2 AND 3)****Q14** How positive or negative do you feel about electric vehicles?**SINGLE CODE. FORWARD/REVERSE 1–5***Please select one option only*

1. Very positive
2. Fairly positive
3. Neither positive nor negative
4. Fairly negative
5. Very negative
6. Don't know

**ASK IF NEGATIVE (CODES 4 AND 5 AT Q14)****Q15.** Why do you say this?**MULTICODE 1–10****RANDOMISE 1–9***Please select all that apply*

1. I think they are too expensive to buy
2. I think they are too expensive to run/maintain
3. I am concerned about the risks of running out of battery power/reliability
4. I think they have limited mileage that can be travelled without recharging
5. I think they are dangerous for pedestrians/road safety aspects
6. I think the technology is in early stages/not yet fully developed
7. The availability of public charging points
8. Because I can't get the sort of car I want in an electric option
9. Because I don't have off-street parking or the ability to charge at home
10. Other, please specify (**OPEN TEXT BOX**)
11. No reason (**EXCLUSIVE**)
12. Don't know (**EXCLUSIVE**)



**ASK ALL WHO DO NOT HAVE A DISABILITY THAT PREVENTS THEM FROM DRIVING (ALL EXCEPT CODE 1 AT Q0)**

**Q16.** Would you ever consider buying or leasing an electric car in future? (This could either be new or second-hand.)

**SINGLE CODE**

*Please select one option only*

1. Yes
2. No
3. Maybe
4. Don't know

**ASK ALL**

**Q17.** To what extent do you support or oppose the following ...?

**RANDOMISE ORDER OF ROWS. SINGLE CODE PER ROW. PROGRESSIVE GRID. FORWARD/REVERSE COLUMNS 1–5**

*Please select one option only for each statement*

**ROWS**

1. Using low-traffic neighbourhood schemes to reduce vehicle traffic in residential areas, e.g. through bollards, speed humps, double yellow lines, cycle parking, and 20mph speed limits
2. Improving cycling infrastructure, e.g. building more cycle lanes
3. Introducing charges for drivers who want to drive into the centre of towns and cities to reduce traffic congestion and improve the local environment
4. Introducing clean air zones, charging drivers who want to drive into the centre of towns and cities in vehicles that fail to meet environmental standards

**COLUMNS**

1. Strongly support
2. Tend to support
3. Neither support nor oppose
4. Tend to oppose
5. Strongly oppose
6. Don't know **(EXCLUSIVE)**

**ASK ALL WHO DO NOT HAVE A DISABILITY WHICH PREVENTS THEM FROM DRIVING (Q0=2 AND 3)**

**Q18.** To what extent do you agree or disagree with the following statements?

*Please select one option only for each statement*

**RANDOMISE ORDER OF ROWS. SINGLE CODE PER ROW. PROGRESSIVE GRID. FORWARD/REVERSE COLUMNS 1–5**

**ROWS**

1. We should all be expecting to drive less in the future because of the impact that driving has on the environment
2. The Government should take steps over the next decade to reduce traffic, even if that affects the journeys I might make by car

**COLUMNS**

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know **(EXCLUSIVE)**

**ASK ALL**

**Q19.** Thank you very much for taking part in the survey. Would you be willing to be contacted again by Ipsos about further research on this topic over the next 12 months? This would either be in the form of a focus group or one-on-one interview with an Ipsos researcher. You would be under no obligation to take part if you say yes, and you would be paid for your time if selected.

Please note that your personal data would **never** be shared outside of Ipsos and only ever be used to recontact you about further research on this topic. Your personal data would be securely deleted from Ipsos servers by October 2023.

**SINGLE CODE**

1. Yes, my email address is (OPEN TEXT BOX)
2. No

# **Appendix C**

## **Our Standards and Accreditations**

# Appendix C

## Our Standards and Accreditations

Ipsos standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.



### ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates Interviewer Quality Control Scheme. It covers the five stages of a market research project. Ipsos was the first company in the world to gain this accreditation.



### Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence, and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.



### ISO 9001

This is the international general company standard with a focus on continuous improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.



### ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.



### The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.



### HMG Cyber Essentials

This is a Government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the Internet.



### Fair Data

Ipsos is signed up as a 'Fair Data' company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

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Ipsos Public Affairs works closely with national governments, local public services, and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. Combined with our methods and communications expertise, this helps ensure that our research makes a difference for decision-makers and communities.

