

RAC Report on Motoring 2012

A sign of the times

RAC
the driving people



Foreword Eddie Irvine

As a former Formula 1 racing driver, I understand better than most the power of a motor car and more importantly its fragility.

Driven badly they put both the driver and others on the road around them in danger, and I am constantly alarmed by the speed and carelessness of some drivers today. The roads we drive on today bear no resemblance to the ones of ten years ago, with ever increasing numbers of cars and more frenetic driving mirroring our busier lives.

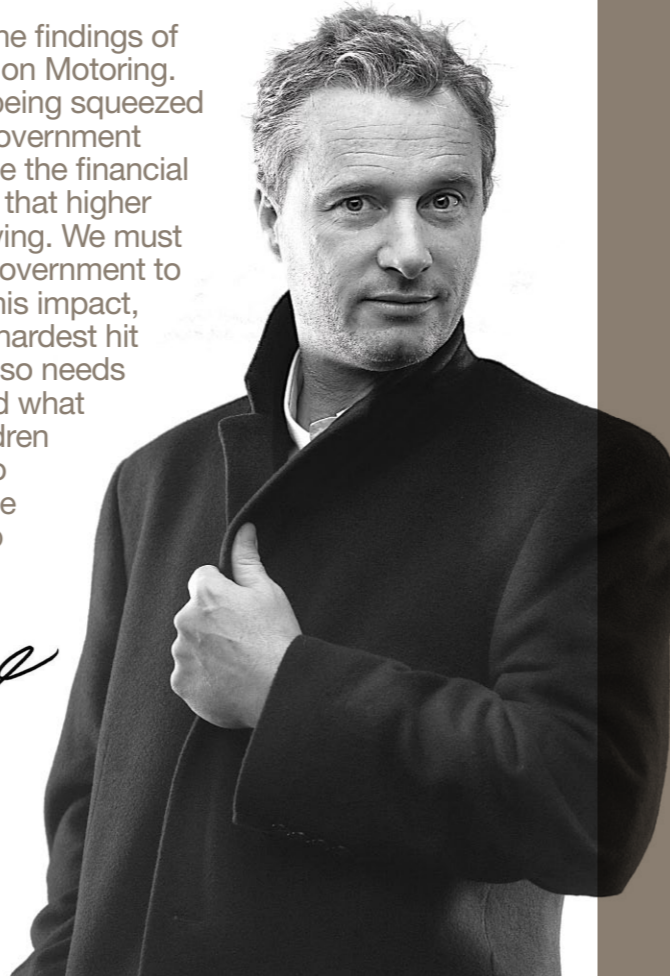
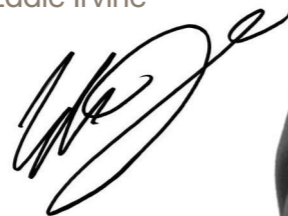
Somewhere along the way respect for motoring and other motorists has got lost. We need to address this through a fresh approach to driver education and training. Drivers, both old and new, need to be taught not just to drive the car but also about greater awareness of the road around them and the courtesy that should be extended to other road users. Despite the technological advances, cars are still fallible and the lesson that speeding can kill needs to be reinforced, especially to young learners and those newly qualified. This is one of the reasons why I am in support of charities such as Brake, promoting road safety.

The other key area of concern I have is the social impact of the seemingly endless rise in the price of fuel.

Families, older people and those living in rural areas, who are highly dependent on their vehicles, are the forgotten victims. It is they who have seen the cost of filling up their car increase almost daily, but who often quite simply do not have a public transport alternative.

I fully agree with the findings of this year's Report on Motoring. As motorists are being squeezed from all angles, Government needs to recognise the financial and social impact that higher fuel prices are having. We must see action from Government to mitigate against this impact, especially for the hardest hit in our society. It also needs to look at how and what we teach our children about motoring so we can bring some respect back onto the roads.

Eddie Irvine



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Executive summary

There are 30 million drivers in the UK, many of whom use their car each day for commuting to work, transporting their families and carrying out social activities.

This Report provides a comprehensive snapshot of their behaviour and attitudes to motoring in 2012. It includes their opinions on the vehicles they own, the reasons they drive, Government transport policy and the behaviour of other drivers. It is based on research from a sample of 1,002 British drivers and commentary from a panel of motoring experts¹.

There are a number of key findings in this year's Report which include:

The **cost of motoring remains the primary concern** for drivers in 2012. 30% of motorists say this is their primary concern, and 61% that it is one of their top five motoring concerns. Over half of drivers have cut down or combined the journeys they take this year, the majority in order to cut costs.

Motorists are **continuing to give up important day-to-day activities by car** as a result of the high cost of motoring. Rural drivers, who have little viable alternative to the car, continue to suffer in particular from high costs. 85% of people who live in the countryside say they would find it very difficult to adjust their lifestyle to being without a car, compared to 69% of urban dwellers.

While motorists are driving less to save money, the remaining essential journeys they take mean **drivers feel more dependent on their cars than previously**. 31% of motorists feel more dependent on their vehicle than one year ago, and 45% are more dependent now than five years ago on their car. Those with children feel this is especially the case.

Concerns about road safety and the behaviour of other drivers have increased across the board in 2012. Three of the top five concerns held by motorists are now about the behaviour of other drivers and only 22% of motorists say they feel safer on the roads than ever before. Conversely, 54% of drivers feel safer in their own vehicles than ever before, as technology improves in-car safety.

There is growing evidence that **cuts in budgets for road safety campaigns run by Government are having an effect on driver behaviour**. The number of motorists aged 17-24 driving under the influence of drugs has nearly doubled from 5% in 2011 to 9% in 2012. Likewise, the number of drivers aged 25-44 accessing social media on their smartphones whilst driving has increased by 50%.

Support for a higher speed limit on motorways remains high, but has fallen from 75% in 2010 to just 62% in 2012. The majority of motorists also believe that if the motorway limit is increased to 80mph, most people will drive at 90mph.

There remains **little support for investment in large scale transport projects** with only 16% of motorists ranking the new high speed rail link in their top five transport investment priorities. 83% of drivers rank investment in maintenance of their local roads as a top five priority, and 75% want investment in maintenance of existing motorways.



1. Further information about the research can be found in the Appendix on page 62

1.0 Introduction

Motorists are adaptable and patient and have put up with a lot over the years – the ever increasing price of driving, constant roadworks, the behaviour of other drivers and congested roads. >>



1.0 Introduction

But have they run out of options? Can they do any more to cut down the cost of driving? Are they walking or using other forms of transport? Do they care about the bigger motoring picture or even the state of their local roads anymore, or have they been beaten into submission by the ongoing economic battle to pay the bills?

The RAC Report on Motoring 2012 reveals a nation of drivers who have run out of ideas in terms of changing their driving behaviour and are too pre-occupied to care about anything more than their immediate driving environment.

In 2008, before the recession took hold, the Report on Motoring revealed drivers were interested in the concept of partnership with Government on the big strategic issues such as the environment and longer term transport policy. Even when questioned back in early 2009, just after the recession first started, motorists were still engaged and caring about the big issues, but were now looking for Government to drive change. Now they no longer seem to care about issues that do not impact directly on their day to day motoring.

Top of their list of concerns is the cost of driving and owning a car. Fuel prices are at record levels and they only ever seem to rise.

Motorists have cut out all superfluous car journeys and amalgamated others wherever possible. The journeys they do take are increasingly restricted to the ones that have to be done. This has led to drivers feeling more dependent on their cars than ever before and further polarised the needs and attitudes between urban and rural drivers, first evidenced in last year's Report.

Running in parallel with economic issues are concerns about other drivers' behaviour. Motorists in the 2012 Report consider themselves law abiding, but worry about other motorists' annoying and potentially dangerous bad habits. A lack of visible policing on the roads is also a concern.

A generation of motorists is growing up without having experienced high profile Government campaigns alerting them to the danger of drink and drug driving and using a hand held mobile while they drive.

This reduction in road safety education has seen the number of young people willing to drive under the influence of drink or drugs increase and the number of phone related offences soar.

Education and training for motorists come through strongly in the Report and a desire for life-long opportunities, which starts whilst in school and continues until the keys are hung up for the last time, are evident.





2.0 Who is the motorist?

Motorists are buying and running fewer cars and are only driving when necessary. Many have cut their driving back to the bare minimum. So what is it like to be a motorist in 2012? >>

2.0 Who is the motorist?

2.1 What motorists drive

Of the motorists surveyed for the 2012 Report, 57% have only one car and 35% have two cars. Three in five motorists also claim they could not reduce the number of cars in their household. Drilling down further into the data, 60% of rural drivers could not reduce the number of cars in their household against 50% of those living in urban areas.

According to the Society of Motor Manufacturers and Traders, the average age of a car on the roads is 7.25 years – though motorists questioned for the Report drive cars averaging slightly less than this. A third of motorists drive a car aged between 5-10 years old, one in ten motorists drives a car over ten years and over 50% have a car under five years old.

Decline in car sales

New car sales fell 4.4% in 2011 from 2010, down to 1,941,253. But the downward trend masked the fact that fleet sales increased by 4.7% and business sales only fell by 0.6%, with private sales pulling the overall figure down by falling 14%².

Superminis



7 in 10 motorists drive a small car of which a third drive a mini or super-mini which is unchanged from last year. Half of this group are drivers aged between 17-24 years old and only a quarter had children.

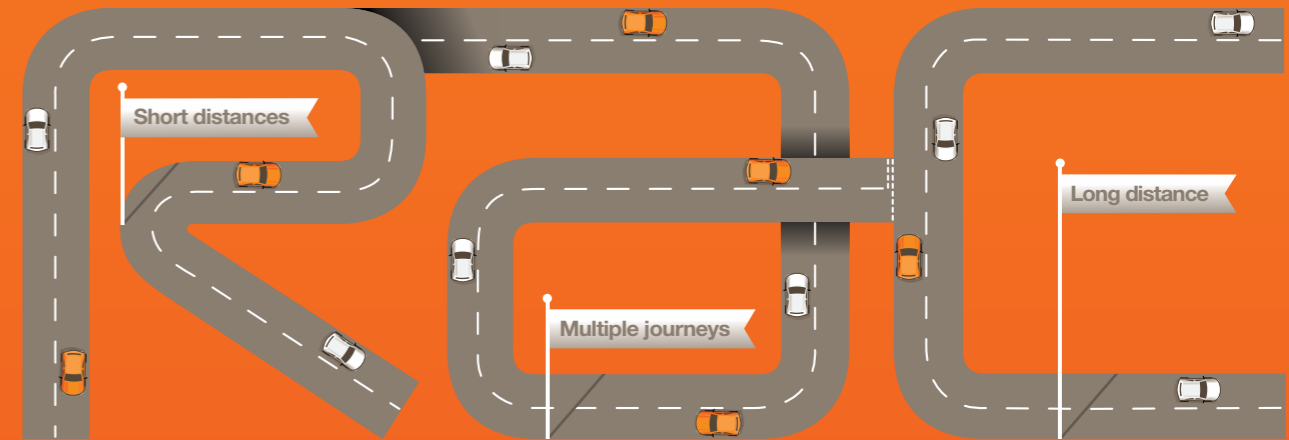
50%
have a car under five years old

2.2 The amount driven

The average motorist drives 9,115 miles a year – though company car drivers cover 18,266 miles annually. Men drive more than women at 10,240 and 7,921 miles respectively and those with children drive around 1,330 miles more than those without.

While motorists are trying to drive less by combining journeys and reducing the number of non essential trips, provisional figures from the Department for Transport indicate that the number of miles driven last year actually increased by 0.9% after falling steadily since 2008³.

Cutting down on long/short journeys



56%
cut down on the number of short journeys they made – 48% for financial or personal reasons.

63%
of drivers combined as many journeys as possible into one – 57% for financial or personal reasons – a significant increase on the 58% doing so in 2010.

49%
cut down on the number of long journeys they made – 43% for financial or personal reasons – up from 42% in 2010.

2. <http://www.smmmt.co.uk/shop/motor-industry-facts-2012/>
3. <http://www.dft.gov.uk/statistics/tables/tra2501/>

2.3 Motorists' concerns

Cost of motoring



The cost of motoring tops the list of concerns with **60%** ranking it of importance and **30%** of most importance; this has fallen from **65%** last year as other issues become more prominent.

The most concerned age group is the 25-44 year olds with **34%** ranking it of most importance.

By the time motorists reach 70, only **26%** think it is most important. But not surprisingly **36%** of those living in rural areas count it as the most important issue for them, against **27%** of those living in urban areas.

Behaviour of other drivers

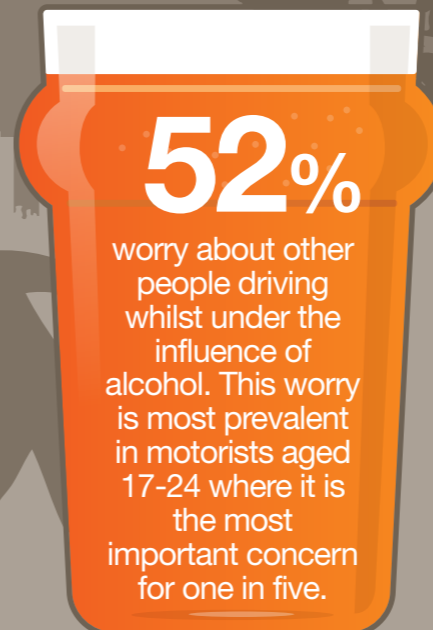
Alongside the cost of motoring, the behaviour of other drivers on the road is of high concern to motorists this year. Three of the top five concerns held by motorists are about other drivers.



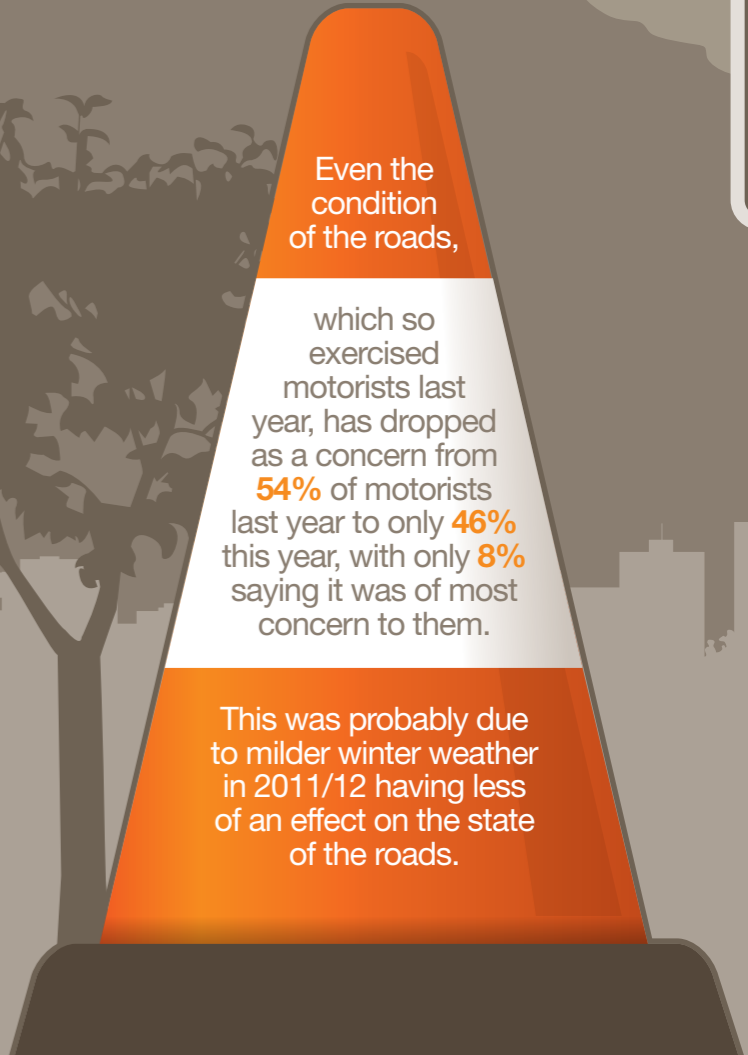
No tax and insurance




Driving under the influence



Condition of the roads



3.0 Motorists and money



Money still remains the number one concern for motorists with an ever increasing proportion of their weekly spend being eaten up by transport costs whether they are driving or using other modes of transport. But is the financial burden equal across all motorists and what are they giving up to balance the books? >>

3.0 Motorists and money

The planned rise in fuel duty in August should be scrapped at a time when drivers are being hit by record fuel prices
See page 60 for full RAC calls to action.

3.1 The cost of motoring

The price of petrol rose 16.9% and the price of diesel 20.3% over the last two years⁴. Overall, the cost of motoring soared by 14% in 2011 – bringing it up to an average of £6,689 – or 55.7p per mile to own and run a car⁵.

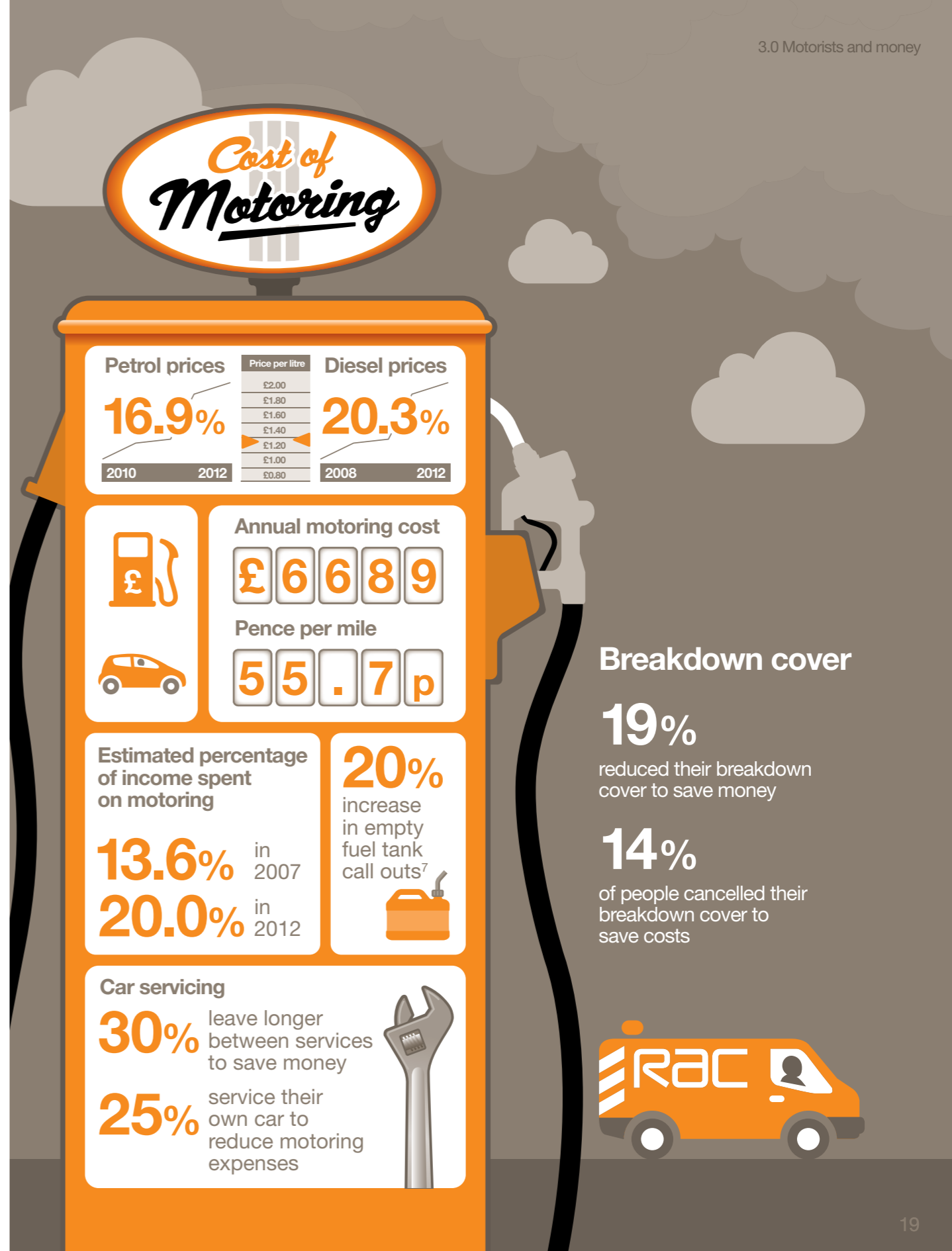
So how do these increases affect motorists' views on the cost of motoring? More than half don't know what percentage of their income they spend on motoring and cannot estimate whether it is more or less than five years ago or even 12 months ago. Those that think they know, estimate that they spent an average 13.6% of their income on motoring five years ago and that this has now rocketed to 20%. According to the Office for National Statistics, transport accounts for 13.7% of the average weekly household budget, of which motoring costs form the vast majority (11.1%)⁶. For family households with two cars, the figure is likely to be significantly higher.

With costs so high, more than half are changing the way they drive to conserve fuel. Interestingly, while

driving to conserve fuel has environmental benefits, only 12% of motorists claim that environmental concerns affect their driving style. This desire to save money can be clearly seen elsewhere in the Report, with motorists leaving longer between servicing and changing their insurance and cancelling breakdown cover.

For example three in ten motorists are leaving longer between services to save money with more than a quarter claiming to service and repair their own cars. Some 14% also claim to have cancelled their breakdown cover and 19% have reduced their level of cover. These trends are obviously of concern because of the increased risk of more accidents attributable to motorists driving unroadworthy vehicles. Despite cash-strapped motorists cutting back on breakdown cover, the number of breakdown calls resulting from motorists running out of fuel soared by 20% compared to 12 months ago due to rising fuel prices, showing the increasing risks that motorists are prepared to take to try to squeeze the last mile out of their tank.

4. The average petrol and diesel prices on 26 April 2010 were 121.1p/litre and 122.3p/litre, compared to 141.5p/litre and 147.1p/litre on 26 April 2012. www.petrolprices.com
 5. <http://www.rac.co.uk/press-centre/press-releases/post/2011/11/cost-of-motoring-soars-by-14-almost-three-times-inflation/>
 6. <http://www.ons.gov.uk/ons/rel/family-spending/family-spending/family-spending-2011-edition/index.html>
 7. <http://www.rac.co.uk/press-centre/press-releases/post/2012/3/rac-reports-20-increase-in-motorists-running-out-of-fuel-as-petrol-prices-soar/>



3.0 Motorists and money

3.2 City versus countryside

36% of motorists believe other drivers could get out of their cars and use public transport. But the view is polarised between 47% of people in cities believing this against just 29% of motorists in rural areas – reflecting the lack of alternatives to the car in many rural areas.

The difference becomes ever more pronounced on the issue of car dependency:

85% of people who live in the countryside would find it very difficult to adjust their lifestyle to being without a car, against 69% of those who live in a town or city.

47% of all motorists said they walked or cycled more and left the car at home, but only 31% of rural drivers were able to do this, against 58% of urban ones.

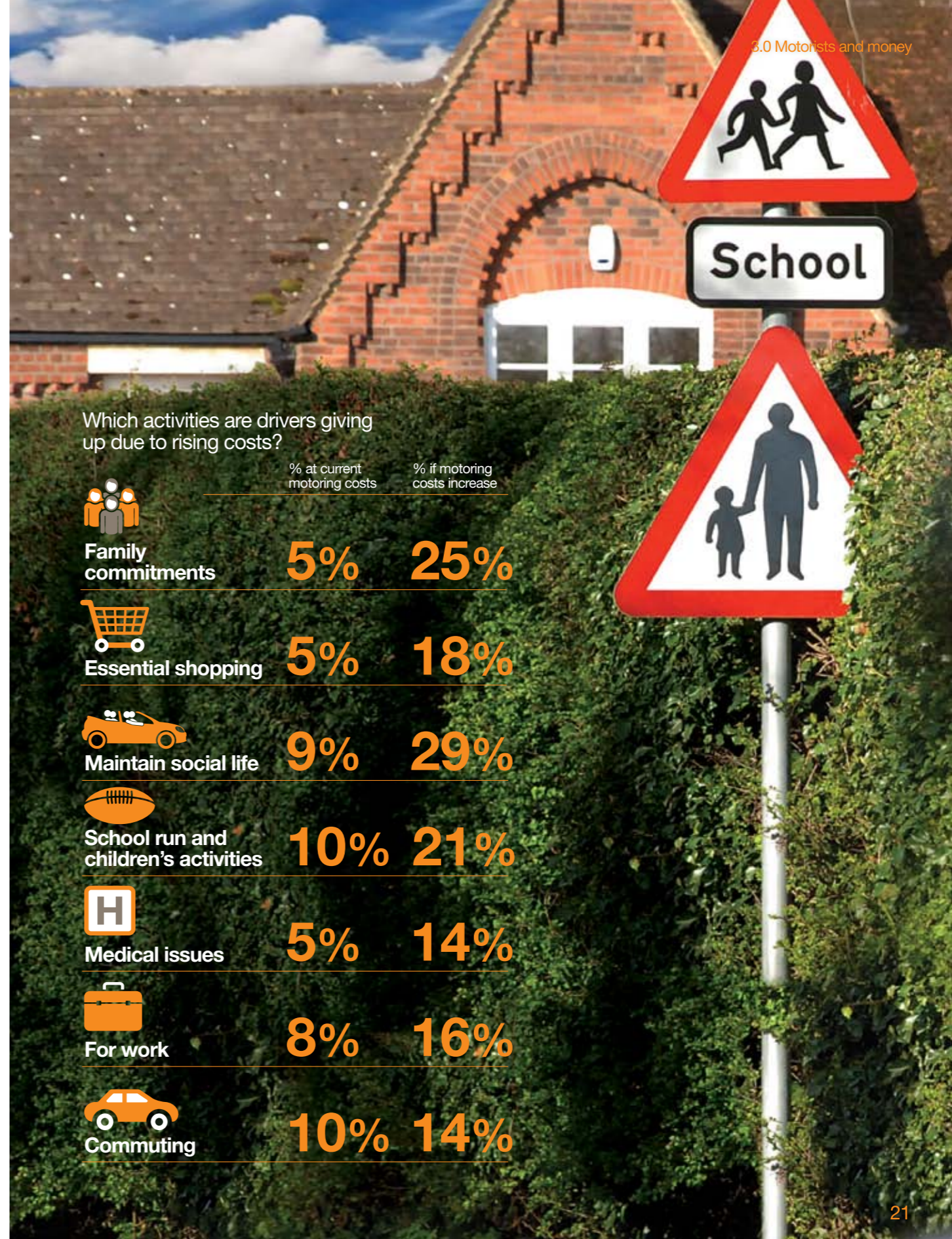
40% of all motorists used public transport for short journeys, but only 28% of rural drivers were able to do this, against 51% of urban ones.

32% of all motorists used public transport for long journeys, but only 26% of rural drivers were able to do this, against 43% of urban ones.

3.3 Giving up

As the economy continues to bump along the bottom, motorists are being forced to change their behaviour and give up activities to keep motoring costs down. Some have made radical changes such as the 2% that sold their car and now use public transport, a bike or motorbike instead, and the 12% that have downsized their car. But the vast majority are just using their car less.

The figures opposite are similar to those reported last year, which means an increasing number of motorists and their families risk becoming isolated as they can no longer afford to visit friends and family or attend social gatherings. This could eventually lead to a disconnected and dysfunctional society where the only affordable social interaction for the less affluent is via a computer or phone from their home. There is also evidence of communities suffering as local shops and community facilities such as restaurants and sports centres shut down because local people can no longer afford to travel to use these facilities.



Which activities are drivers giving up due to rising costs?



3.0 Motorists and money

3.4 Car dependency

Motorists are driving less, typically for economic reasons, but that does not make them feel less dependent on their cars. Indeed, nearly half say they feel more dependent on their car than they did five years ago, despite just over a third saying they drive less than they did then. And a third says they feel more dependent than they did just a year ago against a background of more than a quarter saying they drive less.

The majority of motorists have reduced the number of journeys they make and amalgamated trips wherever possible.

This means that while they may have actually reduced their car usage overall, they are no less dependent on their cars and may have no other alternative to driving.

Interestingly however, while 84% of motorists shop online, almost two thirds say it has made no difference to either their car dependency or their car usage.

So what are the journeys motorists are so dependent on their cars for, and could they use other forms of transport?

“It’s not surprising that many motorists feel they have no alternative to the car;

cuts in bus funding have seen 1100 services disappear over the last year and the design and location of some new developments add to car dependence. Government needs to use planning powers and fuel tax income to unhook people from car dependence and give them real and attractive alternatives to more of their car journeys.”

Stephen Joseph
Chief Executive, Campaign for Better Transport



How dependent are motorists on their cars for different activities?



3.0 Motorists and money

The UK's 'compensation culture' must be tackled as part of efforts to limit the surge in car insurance premiums
See page 60 for full RAC calls to action.

3.5 Motoring alternatives

Motorists living in urban areas will often have a range of public transport alternatives to allow them to conduct their lives without their car. Those in rural areas commonly have no choice as public transport options will be limited and, for many, do not exist at all. But for those living in the suburbs, public transport options may exist but are often inadequate or inconvenient. For example, a third of suburban motorists could do their essential shopping without a car but it would be more difficult, against one in three urban drivers and one in five rural drivers who have little choice.

It is this lack of good alternatives to the car, rather than an underlying reluctance to use public transport that appears to drive behaviour. Thus, 60% say they would get out their cars more if public transport was better. But ironically, the state of the economy has led to cut backs in the number of bus services, particularly in rural areas and this, combined with increasing fares makes public transport less attractive and less viable for many motorists.

3.6 Insurance

The price of insurance soared by 14.4% in 2011⁸, forcing motorists to do all they can to reduce this cost:

Seven in ten have used a price comparison website.

Half have switched provider for a better deal.

Two in five have renegotiated their premium with their current insurer.

15% have reduced their level of cover and 24% removed extras such as legal insurance.

More worryingly:

More than one in ten has named someone else as the registered driver to save money – an illegal practice known as fronting.

7% have cancelled their cover altogether – though some of these will be those who have also sold their car.

Meanwhile Government is also considering proposals to slash the number of whiplash claims by setting a minimum speed limit below which such claims cannot be made. It also wants to limit referral fees, to lawyers in particular, to reduce the cost of claims, and hence premiums.



From 21 December, insurers will not be allowed to use gender to determine the price of car insurance premiums. The changes are needed because of a European Court of Justice ruling stopping gender being taken into account in any insurance contract. The effect of this will be to significantly push up the cost of cover for young female drivers, while reducing the cost of cover for young males, though by a lower percentage. All other age groups are likely to be affected but by less significant amounts.



3.7 Company car drivers and money
 Company car drivers are significantly less affected by the cost of motoring than other groups of drivers so their attitudes differ:

48% say they will have to cut down on the amount they drive if fuel prices continue to increase compared to 68% of private motorists.

53% have combined journeys to save money compared to 64% of private motorists.

39% have walked or cycled more compared to 47% of private motorists.

49% have changed their driving style to conserve fuel compared to 54% of private motorists.

8. <http://www.rac.co.uk/press-centre/press-releases/post/2011/11/cost-of-motoring-soars-by-14-almost-three-times-inflation/>

The FairFuelUK campaign: supporters have their say

RAC is a key supporter of the FairFuelUK campaign which is calling on Government to cut fuel duty to ease the financial pressure on motorists, stimulate growth in the economy and create thousands of new jobs.

Research by the Centre for Economics and Business Research reveals a 2.5p per litre cut in fuel duty would boost GDP by 0.33%, create 180,000 jobs over 12 months and would not cost the Treasury a penny in lost revenue⁹.



I have a 30 mile round trip to work and back every day. Unless I get a pay rise then I'm going to have to give up work after the fuel duty increase in August because I can't afford to get there in my car, while public transport would mean 4-5 hours of travelling every day but still paying out about the same money to get to work and back.

Helen, Ashton Under Lyne

I only have a small car and I struggle to pay my fuel costs every month. I work full time and am a single mum. I need to take my car to work as it would be two bus journeys to get there. Petrol prices are an absolute disgrace and Government should be ashamed of themselves. Any higher and I won't be able to continue to work – then Government will have to pay my rent, council tax, school meals, and pay me benefits. Is that what they want?

JM, Perth

“Fuel duty is now a social issue...”

Pump prices in the UK are the highest ever recorded and economic activity is being stifled. The Treasury's fuel duty model no longer works and the pressure on business and families is unbearable and unsustainable. I don't believe this Government understands the huge discontentment they're creating. They need to reduce duty as soon as possible.”

Quentin Willson
Motoring Journalist and National Spokesman for FairFuelUK

FairFuelUK's report from the Centre for Economics and Business Research on the effects of a cut in fuel duty should be properly examined by Government

See page 60 for full RAC calls to action.

I have a 90 mile round trip to work. In three years my weekly diesel bill has gone from £30 to £85 a week. We live in a rural location so with school and shopping runs my wife spends £30 a week on fuel as well.

MW, Benington

I take our only car to work most days leaving my wife without her own transport. We used to have two cars but with road tax increases and the continued rise in the cost of petrol we could no longer afford to run the second one. My wife is no longer looking to return to work as the cost of having a second car outweighs having extra income. I'm coming close to packing in work as well – it's just too expensive to travel to work.

PE, Sheerness

I can just about afford to go to work five days a week in my car. As for getting the motorcycle out and going for a ride at the weekend, forget it! It's embarrassing telling friends I can't join them simply because I can't afford to pay for fuel.

Ian, Wigan

My husband and I both work and have to run two cars and the cost of this is horrendous. As Government knows, the general working public are reliant on their cars especially if they are running a family as well. It is unfair to penalise us this way.

ED, Newport



9. <http://www.rac.co.uk/press-centre/press-releases/post/2011/11/cost-of-motoring-soars-by-14-almost-three-times-inflation/>

4.0 Motorists' priorities

Motorists continue to have little appetite for grandiose and expensive transport infrastructure schemes. They recognise that funding for investment in transport is limited and want what money that is available to be prioritised so that local authorities have the resources to maintain and improve their local roads. >>

4.0 Motorists' priorities

Maintenance of motorways and high speed carriageways takes a slightly lower priority but is still important. However, new airport capacity and high speed rail links command a low funding priority.

Government proposals to increase the number of toll roads are supported by 38% of motorists but only instead of, rather than as well as, existing forms of motoring taxation.

4.1 The state of the roads

More than eight in ten motorists think the quality of their local roads is getting worse and 77% think they are getting busier. Seven in ten motorists think the condition of motorways and major roads is noticeably worse. But there is slightly less concern about the state of the roads than 12 months ago. This is likely to be attributable to a milder winter resulting in less damage in 2011/12 than in 2010/11. An injection of Government funding to repair potholes during 2011 will also have influenced opinion. Encouragingly, 44% think both local and motorway journey times are becoming more predictable.

4.2 Motoring taxation

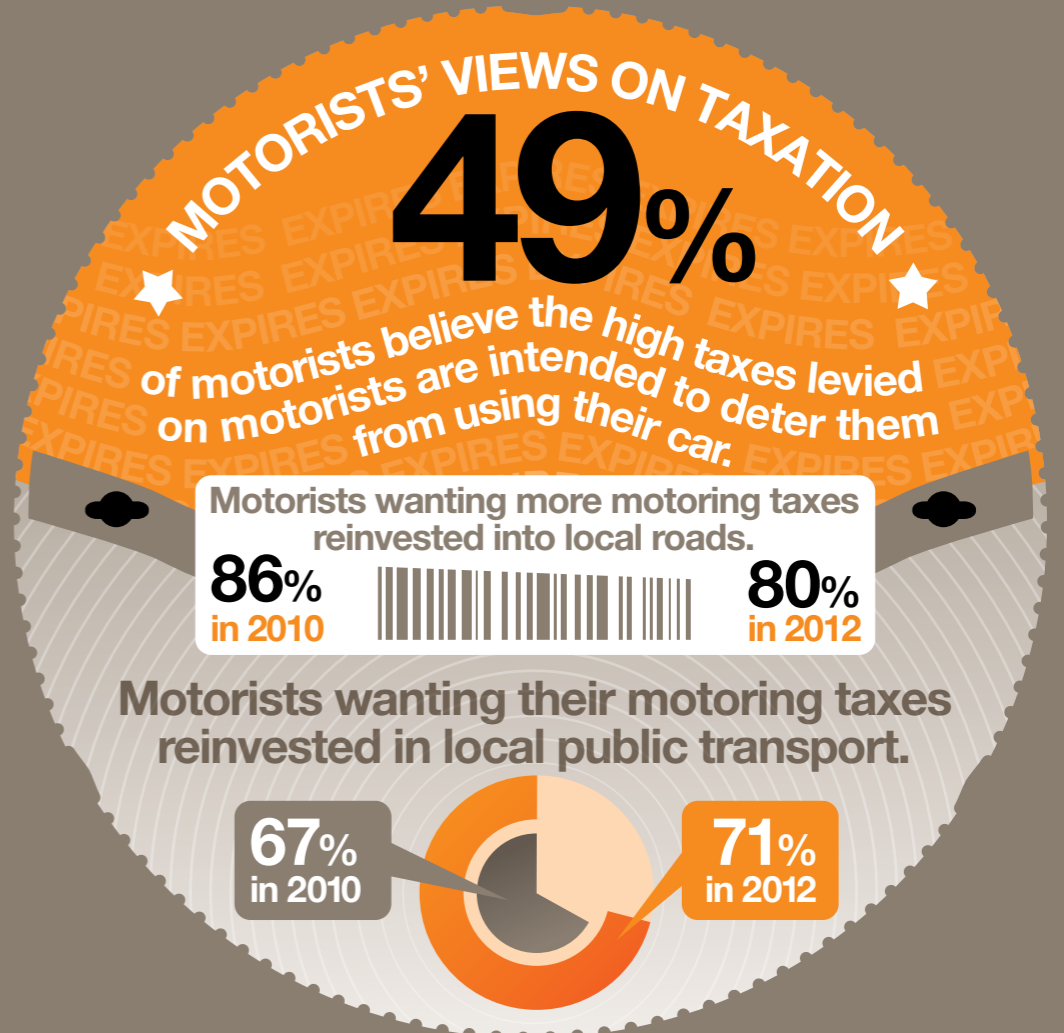
Half of motorists (49%) believe the high taxes levied on motorists are intended to deter them from using their car. Not surprisingly, four in five motorists believe more of the motoring taxes that they pay should be reinvested into local roads. But support for this has fallen from 86% in 2010 as memories of the worst excesses of potholes fade.

The number of motorists that believe their motoring taxes should be invested back into local public transport has grown from 67% in 2010 to 71% in 2012.

These views suggest a gradual acceptance by motorists that there is not a bottomless pit of money to be spent on transport, and local councils are perhaps doing their best with the resources available to them. However they are looking to Government to offer incentives to entice drivers out of their cars rather than imposing additional motoring taxes as a deterrent to driving.

71%

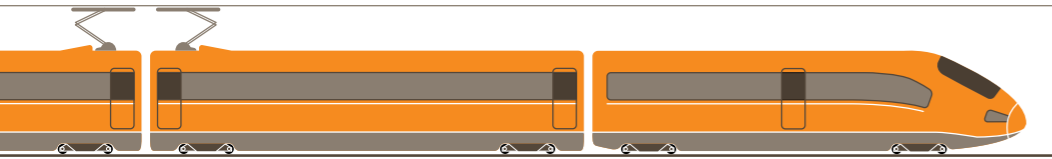
believe their motoring taxes should be invested back into local public transport



4.0 Motorists' priorities

4.3 Where to spend

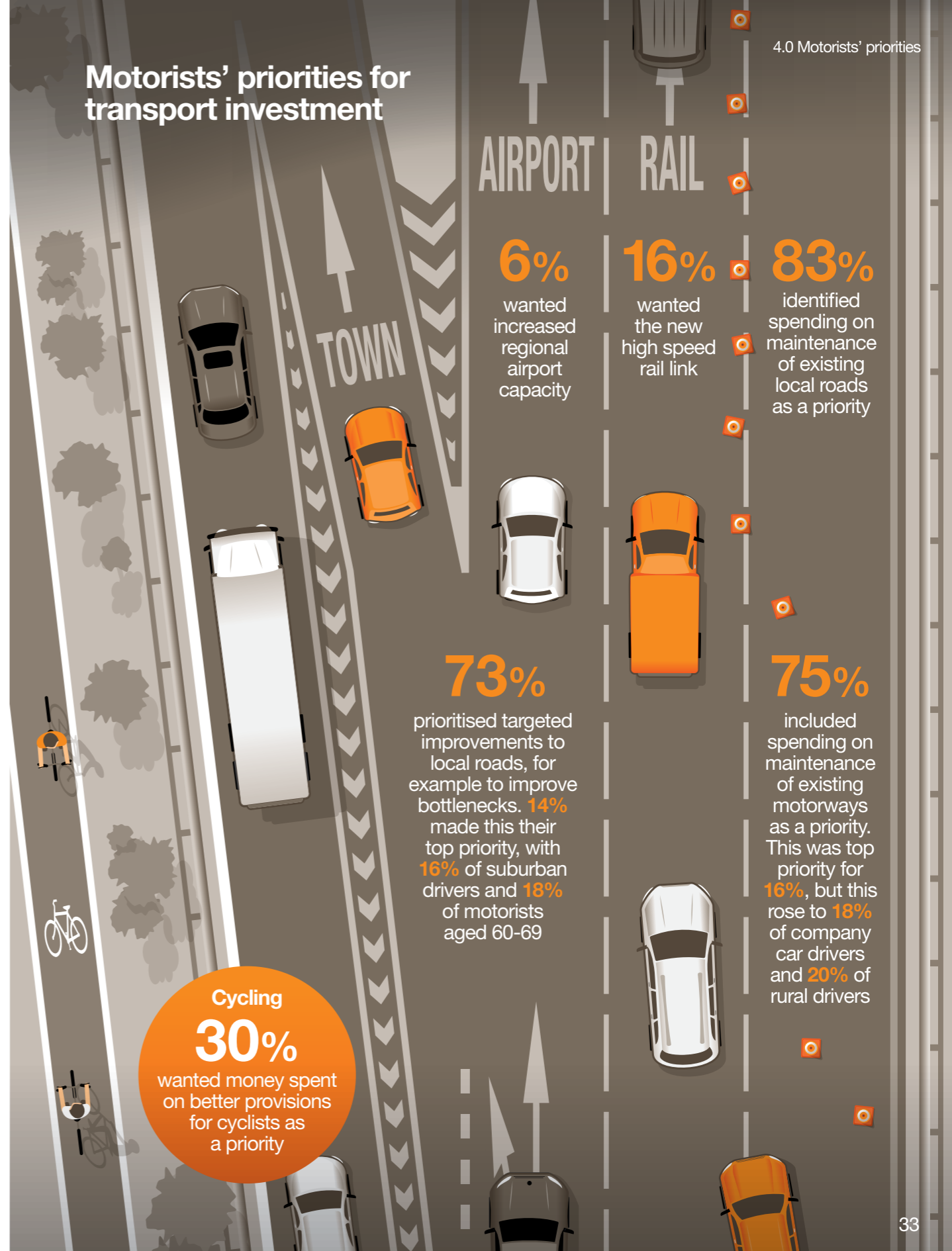
Motorist's priorities clearly reflect the type of driving that motorists do most often. Company car drivers and rural motorists give greater priority than urban motorists to maintaining motorways, perhaps because they drive on them most, whilst suburban and older drivers feel more strongly about local roads being maintained and improved for the same reasons.



“Government has given the go ahead for a high speed rail network between London and Birmingham, but there is still little support from the general public – it’s the wrong solution to the wrong problem.”

David Leibling
Transport and Motoring Consultant

Motorists' priorities for transport investment



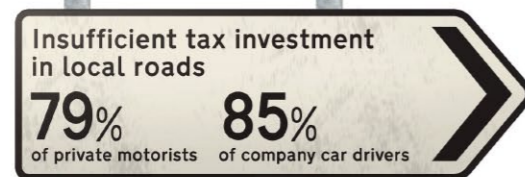
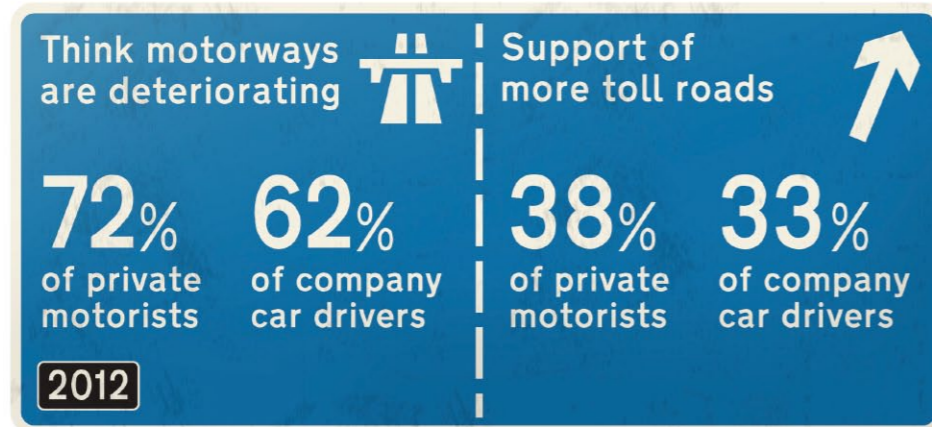
4.0 Motorists' priorities

4.4 What company car drivers want

As the group of motorists who typically drive the most, company car drivers often have differing views on motoring to the rest of the driving population. For example, while 72% of private motorists think motorways are deteriorating, only 62% of company car drivers support this view. They do however feel more strongly than private motorists that congestion is getting worse (71% against 69%).

85% think taxes are not sufficiently reinvested in local roads against 79% of private motorists.

33% of company car drivers would support more toll roads as an alternative to the current system of taxation against 38% of private motorists.



5.0 Safety and security



Motorists are facing a conundrum. They have never felt safer and more cocooned than they do now in the cars they drive. But they also believe the roads themselves are not getting safer. >>

5.0 Safety and security

Some 44% of motorists do not feel safer on the roads, almost three times as many as those claiming to feel safer than ever before. In terms of where they live, 49% of rural against 32% of urban motorists don't feel safer. Allied to this, only 19% of motorists agreed with the statement 'I believe the standard of driving amongst all motorists is as good as it ever has been'.

5.1 Feeling safe

In-car technology makes more than half of motorists feel safer than ever before. And those that drive the most feel safest, with almost seven in ten company car drivers feeling safer in their cars because of new features and technology. Two thirds of drivers aged 70 and over also take comfort from this, against just 43% of drivers aged 17-24, who perhaps never experienced driving cars without many of the safety and hi-tech features that we take for granted today.



“The feeling of being safe inside the car versus feeling less safe on the roads is a ‘cocoon’ effect.

Younger generations of drivers have grown up with the in-car safety technologies that are now seen as standard. They are comfortable with these, which adds to this feeling. But at the same time, people clearly want more done to monitor the behaviour of other drivers on the roads, who they feel pose a risk to them due to perceived bad driving habits.”

Robert Gifford
Executive Director, Parliamentary Advisory Panel for Transport Safety



What makes people feel safe

83%
of motorists over the age of 60 appreciate and feel safer with new safety technology such as parking sensors

70%
of motorists aged 45 and over feel safer with Alcolocks, but only 60% of motorists aged 17-24 felt this way

5.0 Safety and security

The motorway speed limit should be raised to 80mph only on stretches of road where it is appropriate to do so
 See page 60 for full RAC calls to action.

5.2 Speeding

In this year's Report, 92% of motorists believe they are law abiding, even though 83% admit to being regular speeders. The belief that speeding is acceptable and is somehow less serious than other motoring offences is evidenced in attitudes to changing speed limits and their penalties.

Two thirds of motorists support different speed limits on similar classes of road depending on their suitability, with 70% of rural drivers and 63% of urban drivers feeling this way. Company car drivers, with 72% in favour, felt most strongly on this.

Raising the motorway speed limit



75%

of motorists believe that if the motorway speed limit was increased to 80mph, then the majority of drivers would drive at 90mph.

Interestingly this latter figure has fallen from 75% in 2010 during a period when average speeds on motorways have also fallen. Whether this is because of the increased cost of fuel when driving fast rather than for environmental or safety reasons will only become clear if fuel prices fall.



Attitudes to speed limits



in urban area zones
 (schools, certain residential streets)



on urban roads



on country roads

While the majority of motorists still want a higher speed limit on motorways, most drivers are happy with current limits on other roads. This doesn't stop a sizeable minority speeding on them though, with 36% admitting to driving above the speed limit in a 20mph zone. However, unlike motorways, only a very small minority of drivers regularly exceed the limit on these types of roads. Rural drivers admit to speeding more on motorways when conditions are good than their urban counterparts, but urban drivers speed more on all other type of road than they do. Again though, according to the research in the Report, average speeds have fallen compared to a few years ago.

Speeding



46%
 of motorists admitted to speeding in a 30mph limit



37%
 of motorists admitted to speeding in a 50/60mph limit

5.0 Safety and security

Company car drivers have different attitudes to speeding from their private motorist counterparts, and see it as a lesser crime. This is perhaps because their livelihoods depend on being able to drive, and some may be required to have a clean licence by their employer.

38% of this group support no penalty for minor speeding offences against 29% of private motorists.

6% support a five year ban for motorists caught speeding excessively against 19% of private motorists.

87% admit to speeding on motorways (38% on most motorway journeys) against 61% of private motorists (19% on most motorway journeys).

There appears to be a fundamental lack of understanding about the social impact of speeding and the increasing likelihood of fatalities and serious injuries as speeds rise. This, and a perceived lack of police presence, has engendered a lax attitude to speeding amongst a significant proportion of motorists that endangers both themselves and other drivers around them. There is a strong argument for renewed campaigning on the dangers of speeding as the problem is quite clearly not confined to the stereotypical 'young male driver'.

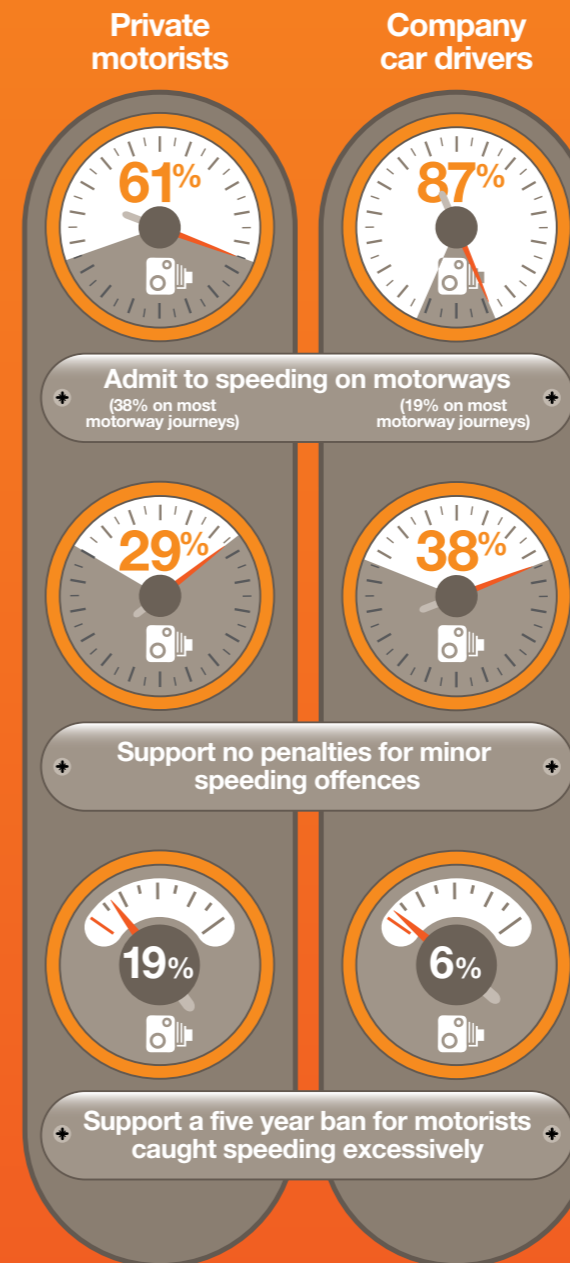
“It’s very interesting that support for a higher motorway speed limit has fallen so much in 2012, despite all the publicity on the issue.

Nationally, statistics show that driving speeds are falling but regionally it’s a more mixed picture. Some local councils turned off speed cameras as part of ending the ‘war on the motorist’ but others didn’t. The result is the complex picture we’re seeing.”

Professor Stephen Glaister
Director, RAC Foundation



Attitudes to speeding



Road safety campaigns
Unlike in previous years, Government did not run a major road safety campaign from May 2010 to Christmas 2011 – when drink driving adverts ran. In total, the Department for Transport spent £2.34m on road safety campaigns in 2010/11, compared to £18.6m in 2009/10.



5.0 Safety and security

High profile road safety campaigns need to be reintroduced to avoid a generation of drivers missing out on this vital information
See page 60 for full RAC calls to action.

5.3 Driving under the influence

Only 7% of motorists admit to knowing or believing that they have driven over the limit shortly after having a drink and 6% to having done so the morning after. But 14% of 17-24 year olds admit to knowing or believing they have driven under the influence the morning after. Younger people are also three times as likely – at 21% – than someone aged 45-59 to get in a car the morning after with someone they know or suspect to be over the limit.

Young people are also more likely to drive under the influence of drugs.

9% of 17-24 year olds admitting to having done so against 5% of all motorists.

Company car drivers are the least likely to have done so at 1%.

6% of urban drivers against 2% of rural motorists admitted to drug-driving.

7% of 17-24 year olds admit to being driven by someone under the influence of drugs against 2% of all motorists.

Motorists, whilst being tolerant of speeding, are much less forgiving of driving regularly, or while excessively, under the influence of drink or drugs, with 55% calling for a lifetime ban for

such offences and 95% calling for a ban of some duration. However support for a ban fell to 61% for drink and 73% for drugs for one off or just over the limit offenders. There appears to be a direct link between the likelihood of offending and the views on severity of penalties. For example only 49% of 17-24 year olds support a lifetime ban for people caught regularly or excessively under the influence of drugs against 62% of 45-59 year olds.

This attitude again highlights the dangers of allowing people to drive without regular reminders about the dangers of drink and drug driving and how impaired senses can lead to fatalities. It also brings back into focus the perception that the lack of visible policing encourages these motorists to continue to endanger themselves and other road users.

5.4 Mobile phones

It is illegal to use a hand held mobile phone whilst driving, and police figures suggest it was a contributing factor in 2% of road fatalities in 2010¹⁰, but motorists appear to be constantly flouting this law.

Too many motorists do not treat using hand held mobiles as an offence, which suggests that current penalties are not working.



14% of 17-24 year olds admit to knowing or believing they have driven under the influence the morning after.

From 1 July, all drivers in France are required to carry a breathalysers so that they can confirm that they are not over the limit. Non-compliance currently carries a fine of 11 Euros.

10. <http://www.dft.gov.uk/statistics/releases/road-accidents-and-safety-annual-report-2010/>

5.0 Safety and security

The laws on hand held mobile phone usage at the wheel need to be more effectively enforced and businesses engaged on this issue
See page 60 for full RAC calls to action.

Only 124,700 people were given a fixed penalty notice for driving using a mobile phone without a hands free kit last year¹¹. However:

42% would like to see a ban for people convicted of mobile phone related offences, whilst 53% support fines and three or six points on a licence. Only 4% support no penalty at all.

Again, awareness campaigns on the dangers of being distracted by a mobile phone and more visible police enforcement are needed. A sizeable minority also want more severe penalties as evidenced above which shows the depth of feeling about this. The recent Department for Transport British Social Attitudes 2011 survey reveals that half (49%) of respondents wanted any form of mobile phone usage in a car banned and 71% felt the law was not properly enforced. Moreover 90% claimed it was not safe to talk on a hand held mobile while driving¹².

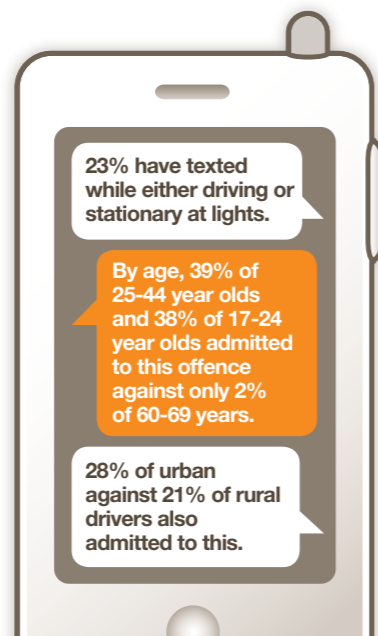
Whilst media attention is focused on offences whilst driving linked to specific equipment such as mobile phones, it is an offence to drive without care and attention when adjusting radios or air conditioning. These can, and do cause accidents by distracting drivers which is why

campaigns need to alert motorists to any distraction that can take a driver's concentration away from the road.

21% have held a mobile phone while either driving or stationary at lights. 17-44 year olds are the worst offenders with 28% admitting it against just 9% of motorist aged 70 and over.

11% of all motorists have accessed social media or their emails whilst driving, rising to 19% for the 17-24 year old age group. 19% of urban drivers also admitted to this against 9% of rural drivers.

11% of all motorists also accessed other websites whilst driving – 18% of 17-24 year olds. 20% of urban drivers also admitted to this against 7% of rural drivers.



11. <http://www.homeoffice.gov.uk/publications/science-research-statistics/research-statistics/police-research/police-powers-procedures-201011/>
 12. <http://www.dft.gov.uk/statistics?tag=mobile-phones>



Roads policing needs more priority from Government to discourage poor and anti-social driving behaviour
See page 60 for full RAC calls to action.

5.5 Policing

As stated earlier in the Report, four of the top five issues of concern for motorists relate to the behaviour of other drivers and the deteriorating state of the roads they drive on. Green issues, concerns about older and young drivers and even our preparedness for bad weather have gone down the priority list as motorists focus increasingly on the issues concerning their immediate driving environment.

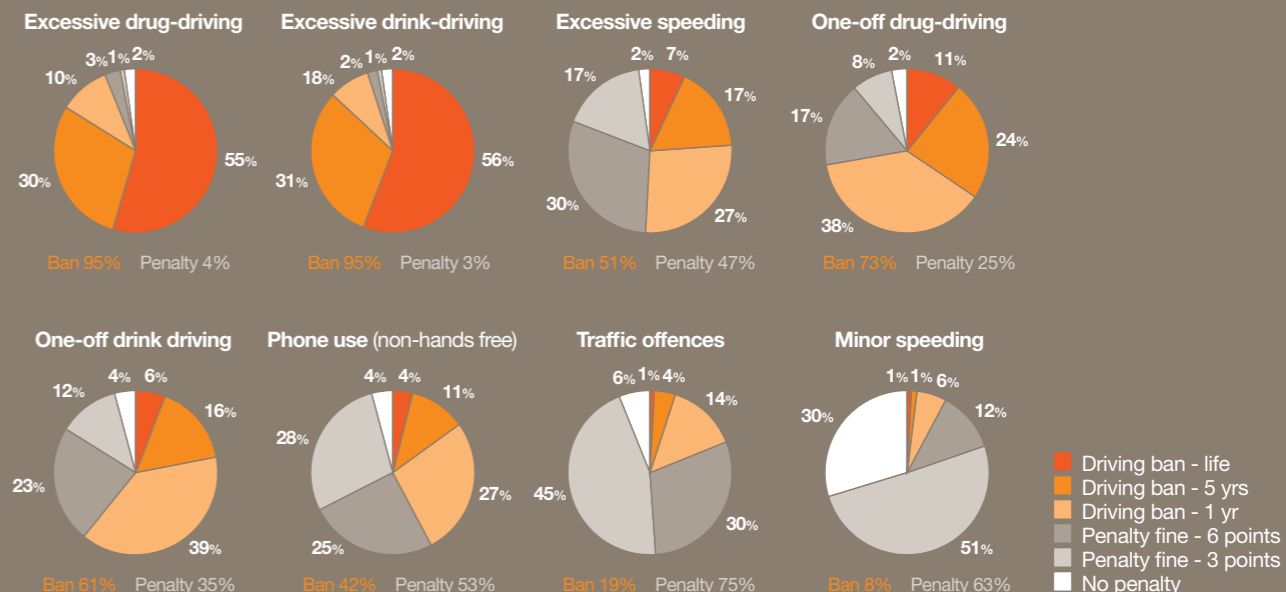
Not surprisingly therefore, they believe there are not enough police on the road and that this allows a

hard core of badly behaved drivers to constantly break the law, secure in the knowledge they are unlikely to get caught.

More than three in five motorists think there are not enough police on the road enforcing driving laws and this includes many of those same drivers who admit to speeding regularly. 57% of rural drivers want more visible roads policing, against 64% of urban ones. However 23% of all motorists actually believed they were unlikely to get caught breaking the law, which appears something of a contradiction.

Motorists' views on appropriate punishments

The vast majority would punish excessive drug- or drink-driving with a ban – unsurprisingly, those who admit to committing these offences would be more lenient.



6.0 Education and driver confidence

The better the driver education and training motorists receive, the better the driver they are likely to be. >>



6.0 Education and driver confidence

A detailed study into the merits of learning about driving at a younger age than 17 needs to be held
See page 60 for full RAC calls to action.

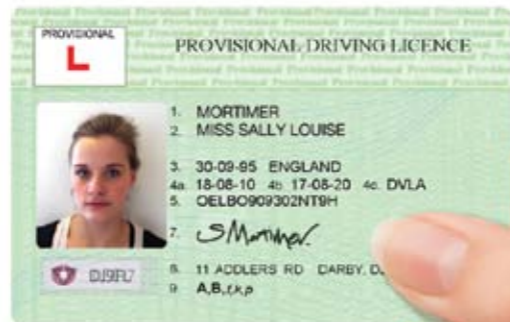
Driver training needs to span everything from attitudes, such as courtesy to other drivers, to the dangers of driving under the influence. It also needs to include sufficient training about the vehicle itself to enable a driver to ensure their vehicle is safe and roadworthy.

6.1 Learning to drive

Under the current system, most young people are not formally taught about driving until they turn 17 years of age. In the US – ‘Driver Ed’ starts at 14 or 15 depending on the state that they live in. However, while UK motorists do not support a lowering of the age at which young people can start to take lessons on public roads, 62% think they should be able to take lessons off public roads before age 17 – with three in ten supporting 16 years and almost one in five, 15 years old.

Swedish study

The Swedish Government conducted a study, comparing the driving behaviour of two groups – one where pre-licence age drivers were given early tuition and the other where they learnt to drive normally. The result was a 41% decline in accidents in the group given early education¹³.



13. ‘Sixteen years age limit for learner drivers in Sweden – an evaluation of safety effects’, <http://www.ncbi.nlm.nih.gov/pubmed/10576673>

6.0 Education and driver confidence

There is also strong support for teaching driving theory earlier – with 84% supporting this – 22% at age 16 and 21% at age 15. In addition, over two thirds of motorists would like to see the rules of the road included as part of the school curriculum. This was supported by more than seven in ten for people over 45 years old and by three quarters of rural drivers who perhaps recognise that their children will have a similar high level of car dependence to themselves. More than half of motorists also support re-testing through a motorists' driving lifetime.

There are also issues surrounding the test itself. A recent report from the Institute for Advanced Motorists found that drivers who think simply gaining years of experience on the road is enough to improve their driving are wrong. According to the report, what makes the real difference is having extra coaching, just as it would be in any other activity. Drivers are more likely to blame chance or bad luck, if the only training they've ever had is those early driving lessons. But they're more likely to take responsibility for avoiding and responding to incidents if they've taken the trouble to try to improve their skills later in life¹⁴.

“A lot of car manufacturers now run off-road programmes with teenagers to experience driving before the age of 17.

This is a positive move, but we need to recognise that it takes a long time to learn to drive safely – experience needs to be gained both before and after passing the test.”

Nikki Rooke
Head of Communications, Society of Motor Manufacturers and Traders

14. <http://www.iam.org.uk/policy-and-research/policy-and-research135/196-policy-a-research>



Driver education

75%
of people over 45 would like to see the rules of the road included as part of the school curriculum

50%
of motorists also support re-testing through a motorists' driving lifetime



6.0 Education and driver confidence

The case for driver education across people's entire motoring lifetime needs to be seriously examined
See page 60 for full RAC calls to action.

6.2 Car maintenance

As cars have become more complicated, it has become increasingly difficult for motorists to perform all but the most basic maintenance. But even this is beyond a significant proportion of those who drive. This is worrying, particularly when considered alongside the trends reported earlier that motorists are leaving longer between services and cancelling or reducing their breakdown cover.

Two in five motorists are not confident about changing a wheel and 48% have never done so. 62% of women, but only 11% of men lack this confidence, while, 61% of motorists aged 60-69 are very confident in doing so against only 22% of 17-24 year olds.

A third are not confident enough to change a light bulb in their car, with 42% never having attempted it. 54% of motorists aged 60-69 are very confident in doing so against 30% of 17-24 year olds.

Confidence in their ability to carry out basic maintenance, including checking tyre pressure and tread and checking the oil, was lowest for young drivers in all tasks.

This yet again highlights how their ability to maintain their car in a safe and roadworthy condition is being hampered by a lack of training as part of the process of learning to drive.

6.3 Older drivers

As the number of older drivers on our roads continues to increase, society is still seeking to find the appropriate balance between maintaining the mobility of an ageing population and ensuring that road safety is not threatened by ageing drivers no longer able to deal with the challenges of our congested roads. However, only 15% of motorists rated this amongst their major concerns. There is, nevertheless, slowly growing support for introduction of further checks.

2 in 5

motorists are not confident about changing a wheel



Attitudes towards elderly drivers

27%
of motorists think there should be a maximum age for driving – up from 24% last year and 22% in 2010

19%
think elderly motorists should be restricted to daylight driving – up from 16% last year and 14% in 2010

7.0 Conclusion

Motorists need help. They have got to the point where they can no longer cut down on the number of trips they make in their cars. But they also accept that if the cost of motoring continues to rise they will have to make even more cutbacks. >>

They are being impacted by a lack of joined up thinking at the heart of Government. Raising fuel tax may add money to Treasury coffers and appease environmentalists by forcing motorists to drive less. But the social implication of this relentless assault on drivers' wallets is being ignored.

Many motorists, particularly those living in rural areas, have no more fat to trim in terms of the number or types of journeys they make in their car. They have, in the main, already cut out the superfluous ones. So if prices continue to rise unchecked, the journeys they are likely to cut out are those that make their lives fuller – visits to friends

and family and maintaining their social life. When social interaction starts to decrease there is a very real danger that society itself will start to break down and people will feel increasingly lonely and isolated. While social networking and the telephone offer a means of staying in touch with the rest of society they are not a substitute for face to face contact.

There needs to be a mechanism to cap prices so that motorists can budget for the essential journeys. Despite promises to look at stabilisation mechanisms whilst in opposition, Government has failed to do so in office. >>

7.0 Conclusion

Safety

Motorists are also concerned about other drivers. They have safe environments within their cars but are worried about the behaviour of other drivers. The issues here are two-fold. Firstly, there is a lack of campaigning and education across all drivers to raise awareness of the implication of anti-social driving behaviour such as speeding or using a hand held mobile phone. Secondly, motorists do not believe there are sufficient numbers of police on the roads to enforce current laws, leading to a core of persistent offenders who feel immune to getting caught and do not understand or care about the extent to which they put themselves or other road users at risk.

Life-long learning emerges as a theme throughout this report. There is strong support for inclusion of driving theory in the school

curriculum and a desire for off-road driver training to start at 15 or 16. And there is a need for drivers to learn how to maintain their vehicles in a safe and roadworthy state. There is also recognition that throughout a driver's life there is a need to constantly reinforce the messages about the dangers of anti-social behaviour (drink-, or drug-driving, use of hand held mobiles etc). There is support for retraining being offered as an alternative to penalties for first time offenders for a range of driving offences and there is a desire to help older drivers to come to terms with their own limitations through informing them rather than imposing more draconian constraints.

Continuous learning needs to become an integral part of a driver's life. Being able to learn is a privilege and needs to be promoted to drivers as such.

Priorities

The most immediate priority is for Government to rejuvenate its driver road safety campaigns to highlight the issues to an increasing number of motorists that have never been subject to these hard hitting adverts on TV or radio.

There is also a strong argument for a rethink of motoring penalties. The Report on Motoring clearly shows there is strong support for harsher penalties for those caught repeatedly breaking the law, but also support for less harsh penalties for minor or one off offences. This would perhaps allow police to spend more of their time catching repeat or serious offenders rather than have their time taken up with more minor misdemeanours.

Finally motorists want Government to spend the limited funds available for transport on improving the roads they drive on daily rather than on new airports or high speed rail. They also want to see public transport improved, so there is a viable alternative to the car as motoring becomes less affordable for all but the most essential of journeys.

But above all, motorists want Government to recognise the crisis that is facing them in their lives and reduce the crippling taxation on fuel that is damaging society and causing genuine hardship.

RAC calls to action

The Price of Fuel

RAC calls on Government to scrap the planned rise in fuel duty in August at a time when drivers are being hit by record fuel prices and are struggling to cope with the impact of high motoring costs.

RAC calls on Government to respond to the recent report by the Centre for Economics and Business Research demonstrating that a cut in fuel duty would stimulate growth, create jobs and be fiscally neutral for the Treasury.

RAC also calls on Government to revisit and amend the new Fair Fuel Stabiliser, which will do nothing to lower the price of fuel at the pumps as presently constructed. A proper mechanism is needed which actively reduces fuel duty in response to rising crude oil prices. Rising prices themselves would offset any reduction in tax revenue from lower fuel duty as a result of increased tax from VAT and North Sea oil taxes.

The 80mph Speed Limit

RAC welcomes the consultation and potential trials on raising the motorway speed limit to 80mph. However, RAC calls on Government to raise the limit only on those stretches of motorway where it is appropriate to do so. Only sections of motorway whose construction and usage patterns are assessed as having suitably modern design and safety features should be upgraded to the higher limit.

In addition, RAC calls on Government to introduce more effective enforcement, in order to ensure 90mph does not become the new de facto limit.

Road Safety Campaigns

The new generation of drivers is in danger of missing out on vital information about the dangers of driving under the influence and using a mobile phone behind the wheel. RAC calls on Government to reintroduce high profile campaigns on the dangers of speeding, mobile phone use, drink- and drug-driving following the lack of such campaigns over the past two years.

To find out more and have your say, go to rac.co.uk/reportonmotoring

Roads Policing

RAC calls on Government to consider raising the priority of roads policing in recognition that the current approach to enforcement is encouraging poor and anti-social driving behaviour.

RAC calls for more effective enforcement of the laws on hand held mobile phone usage at the wheel. RAC also calls for businesses to increase their efforts to educate and monitor their workforce on this issue.

Lifelong Learning

Driving is a skill that needs to be practiced and to adapt to the changing environment on the roads and technology in the vehicle through a driver's lifetime. RAC therefore calls for Government to consider measures to ensure drivers can continue to develop and reassess their motoring skills from the first time they pick up their car keys to the last.

Re-examine when teenagers learn about driving

RAC believes there is a lack of up-to-date information regarding the effectiveness of teaching pre-licence age drivers, particularly in the UK. RAC therefore calls for a study to identify at what age pre-licence tuition would be most effectively introduced, and what form, practical or theoretical, this should take.

Retraining of offenders

RAC calls on Government to conduct a thorough review of the effectiveness of speed awareness courses as a means of altering behaviour.

Depending on the outcome, RAC also calls for the introduction of similar training for first time offenders for a wider range of motoring offences.

Insurance

RAC welcomes the recent Government initiative to reduce whip-lash claims and calls for introduction of stricter rules on the pursuing of insurance claims on a wider range of personal injuries in order to reign-in the burgeoning 'compensation culture' and limit insurance costs overall for drivers in the UK.

Research methodology

'RAC Report on Motoring 2012' is based on a large-scale internet survey carried out by Quadrangle on behalf of RAC.

In total, Quadrangle interviewed 1,002 British motorists (i.e. those who hold a current driving licence and drive at least once a month). The survey was conducted in January and February 2012, with the questionnaire taking around 20 minutes to complete.

The sample was nationally representative of age, gender, socio-economic groups, all GB regions and new car buyers. The number of company car drivers in the sample was boosted by an additional 20 to provide sufficient numbers for analysis of this group (resulting in a total of 100 company car drivers in the overall sample). The results were then post-weighted to represent national household car ownership.

Statistical reliability

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown are an estimate, within a small margin of error, of the actual figures. The error margin varies with the sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering so the error is lower for a 90/10 result than for a 50/50 result.

In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with different sample sizes from the car drivers' survey. For example, from a sample of 1,000, if 50% answered in a particular way, we would be 95% confident that the true range is between 47% and 53%.

Sample size	%age error: 90/10 result	%age error: 50/50 result
2,000	+/-2	+/-3
1,000	+/-2	+/-3
800	+/-2	+/-3
600	+/-2	+/-4
400	+/-3	+/-5
200	+/-4	+/-7
100	+/-5	+/-10

Company overview

Contacts



With around seven million customers, RAC is one of the UK's most progressive motoring organisations, providing services for both private and business motorists. Whether it's roadside assistance, insurance, vehicle inspections and checks, legal services or up-to-the-minute traffic and travel information – RAC is able to meet drivers' needs.

RAC is committed to providing the very highest levels of service to its customers and ranked first for customer satisfaction by J.D. Power and Associates' UK Roadside Assistance Study 2006 to 2009. RAC was also the top-named breakdown organisation in the July 2009, January 2010, July 2010 and July 2011 half-yearly UK Customer Satisfaction Index from the Institute of Customer Service.

Which? Recommended Breakdown Services Provider September 2011 and RAC Insurance has also been awarded the Best Overall Vehicle Insurance Provider 2010/11 by themoneypages.com

RAC's news releases and a selection of images are available from the internet press centre at rac.co.uk/press-centre/

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The Report has been guided by the expert contributions of the RAC Report on Motoring 2012 Advisory Panel.

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