

Foreword

Quentin Willson

In my many years of experience in the motoring industry, it seems to me that the sense of abandonment felt by UK motorists has never been as acute as it is today.

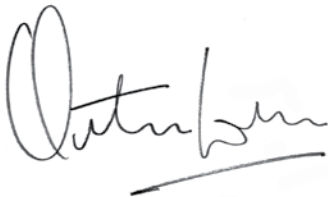
And it's fairly clear why they do feel abandoned. We have never before had such high fuel and insurance costs, factors which have combined with a road system struggling to cope, and a lack of traffic police enforcement.

I can also understand why people don't believe that the 'War on Motorists' is finally over. Drivers clearly think that the anti-car culture hasn't changed and many are saying that driving has become a cheerless and unaffordable chore.

The greatest concern in the driver's mind today is the spiralling cost of fuel. Duty rises are causing untold hardship for millions of motorists. Drivers are being forced to use the roads less, and there's a clear feeling that the price of fuel is hindering economic growth and reducing discretionary spending. In short, the lack of proper fuel price management has become a national neurosis and it is this issue that I continue to campaign vigorously on.

Different drivers are also feeling the pain in different ways. For rural motorists, public transport frequently isn't a viable option meaning they have little choice but to keep filling up the fuel tank. For urban drivers, getting to the shops, commuting to work, and doing the school run are all becoming frighteningly expensive. This is forcing people to make unpalatable personal sacrifices.

In summary, for me, this year's Report on Motoring is a serious indictment on the UK's road transport system. Sadly, too many who took part in the research think that there's little hope of change and that in the short to medium term, motoring standards won't improve. The challenge now is to provide motorists with reasons to believe they aren't facing yet another year of road misery.



RAC Report on Motoring

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Executive summary

Britain is a country of over 30 million drivers, many of whom use and depend on their car each and every day. This Report provides a comprehensive snapshot of their attitudes and behaviour in 2011 with regards to today's motoring issues, the vehicles they own, Government transport policy and the behaviour of other drivers. It is based on research from a sample of 1,002 British drivers¹.

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

The **cost of motoring is the primary concern** for drivers in 2011. 32% of drivers say this issue is their primary concern. Drink-driving; the condition and maintenance of the roads; driving without tax or insurance; and mobile phone usage at the wheel complete the top five.

Drivers are facing **an increasingly tough fight** to meet the rising cost of motoring but remain adamant there are few alternatives. This is particularly the case for rural drivers, though urban motorists are also feeling the pain. For many, using the car is seen as a necessity for daily life. For some, the high costs are already restricting their vehicle usage, to the detriment of their lives.

Drivers **do not believe the 'war on motorists' has ended**. More than three quarters still believe they are being treated as a cash cow by the Government. Just 1% believe the 'war' has ended and 8% that the Government is serious about ending the 'war' but has yet to act.

There are **clear priorities for transport investment** given the limited funds available in the current economic climate. 84% of motorists want the maintenance of existing local roads to be prioritised and 71% want targeted improvements to local roads. There is little support for prioritising the expansion of airport capacity or high speed rail.

There is strong support for **a higher speed limit on motorways**, but the appetite for higher limits on other types of road has declined. 75% of drivers want a motorway limit of more than 70mph but just 16% want a higher speed limit on 30mph roads. More police patrols and the introduction of in-car speed limiters are the most popular methods for tackling speeding.

Drink-driving continues to be a problem with 16% of motorists knowing or suspecting that they've driven over the limit in the last 12 months. **Only 18% of motorists support maintaining the current drink-drive limit** of 80mg compared to 24% who want a 50mg limit and 42% who want a zero limit.

The **illegal use of mobile phones behind the wheel continues to be a problem**, particularly amongst younger drivers. 27% of all drivers admit to using a mobile without a hands-free kit rising to 38% of 17-44 year olds. Social media is also a growing issue. 24% of young drivers admit to using email, Facebook or other social networking sites while at the wheel.



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

Rural



The rural view

"Living in the country, we need our cars – public transport is virtually non-existent! In the winter a decent 4x4 is the only way to get around, but the cost of fuel is now a real challenge..."

Chris and Philippa Sale
Oxfordshire

Urban



The urban view

"The main reason that we use our car in the city is that children from five and over are charged on buses in Edinburgh, so for us all to travel by bus costs £10.40 for a day ticket, or £8 return. Parking is cheaper unless staying somewhere for a few hours or so, and is free on Sundays."

Lorraine and Kevin White
Edinburgh

1.0 Introduction

Being a driver is no fun in 2011. The price of fuel remains on an upward path and potholes, continuous roadworks and other drivers' behaviour can make driving a chore rather than a pleasure. >>



1.0 Introduction

But what does this mean in real terms? Have drivers abandoned their cars in favour of buses or bikes? Do they believe the 'war on motorists' has really been ended by the Coalition Government? Have their concerns about the state of their local roads and driving environment been alleviated?

The RAC Report on Motoring 2011 reveals the fight has gone out of drivers. They are resigned to the fact that nothing is going to change. The 'war on motorists' is said to have ended, but it has been replaced with a 'cold war'. The cost of motoring continues to rise far in excess of inflation. While before this made drivers angry, now they are focused on cutting costs and surviving until the economy improves.

More than ever before, the economic situation is creating a divide between people who live in urban areas and those living in rural areas. The Report uncovers a need for different solutions depending on where drivers live, with those living in rural areas much more reliant on their cars than urban dwellers.

These drivers face stark choices about how much they can actually afford to use their cars and the Report reveals they are cutting back more than their urban counterparts. For many, leisure and social trips are the first to be cut. When this happens people can be left with

feelings of isolation – from friends and family, and abandonment by a Government which they feel is ignoring their plight.

The idea that drivers are primarily focused on issues that impact their daily lives, first explored in last year's Report, comes through strongly again in 2011. There is no appetite for grandiose national schemes which cost billions but benefit relatively few. Drivers want local roads (especially the roads they use regularly) improved and better preparations for extreme weather conditions. It appears they have given up trying to get their voices heard at a national level, but are still trying to influence their local environment.

Allied to this is the continued concern at other drivers' behaviour. Drink- and drug-driving, inappropriate use of mobile phones and other distractions are all contributing to a deterioration in the motoring experience. Drivers want to see better enforcement of the laws that already exist. They want

those caught drink-driving to be subject to meaningful penalties and for a more visible police presence to catch the hard core of motorists that continue to speed excessively, text while driving or drive without insurance or a valid MOT. These are all issues which are being focused on by the Government as part of its newly launched Road Safety Strategy.

The environment has fallen even further down the list of priorities this year. Drivers are not against alternatives such as electric cars, but these have to cost the same or less to buy as existing options – there is no appetite to buy them just because they are green.

Technology is another area affecting drivers and this raises the question of whether in-car technology is helping people to drive better – or simply adding to the already myriad number of distractions.

Drivers have lowered their expectations from the Government in recent years. They know the cost of motoring is not going to fall any time soon and believe proposals such as the fuel stabiliser are unlikely to benefit them to any real extent. They recognise this Government does not have cash to throw around, which is why the demands they make do not require substantial investment.

Finally they want the Government to allow their local problems to be resolved through local solutions that don't assume a 'one size fits all' approach. Policy needs to take a greater account of the differing needs and priorities of those living in urban areas versus rural areas.

2.0 Who is the motorist?



Love them or hate them, cars are here to stay for the foreseeable future. But the economic situation means they are being used less – as drivers use other modes of transport or make fewer trips. Who drives them and where they drive has changed marginally over the year but fundamentally drivers still have to drive. >>



73%
Drive a mini,
supermini, small or
medium size car

2.0 Who is the motorist?

The problem facing drivers today is that the high cost of fuel means they have to think very carefully about the journeys they take. They are combining trips and exploring alternatives. The cost of motoring is polarising the country. Urban drivers who have more options available to switch out of their cars, are typically ranged against rural dwellers with fewer options as they face fewer viable alternatives.

2.1 The cars they drive

Small cars continue to dominate the roads. Although the car scrappage scheme was no longer available to incentivise people, the average age of a car on the road in 2011 remained at 5.5 years, the same as 2010 – with two in five cars aged five to ten years old. 46% of homes have one car in the drive and 44% have two. Almost one in ten homes has three or more cars parked outside.



2. Quarterly Road Traffic Estimates: Quarter 1 2011, <http://www.dft.gov.uk/pgr/statistics/datatablespublications/roads/traffic/>
3. State of the Countryside 2010, <http://www.defra.gov.uk/crc/documents/state-of-the-countryside-report/sotc2010/>

2.2 Behind the wheel

All the evidence shows that we are driving less year on year. According to the Department for Transport's Traffic Estimates for 2010, traffic levels fell 2.1% in 2010 against 2009². The RAC Report on Motoring confirms this.

57% of drivers cut down the number of short distance journeys they made by car.

47% cut down the number of long distance journeys they made by car.

Of those reducing the number of miles driven, approximately a third said they did this for financial reasons.

However, the research shows rural drivers still drive the most on average with:

City drivers covering 8,596 miles a year.

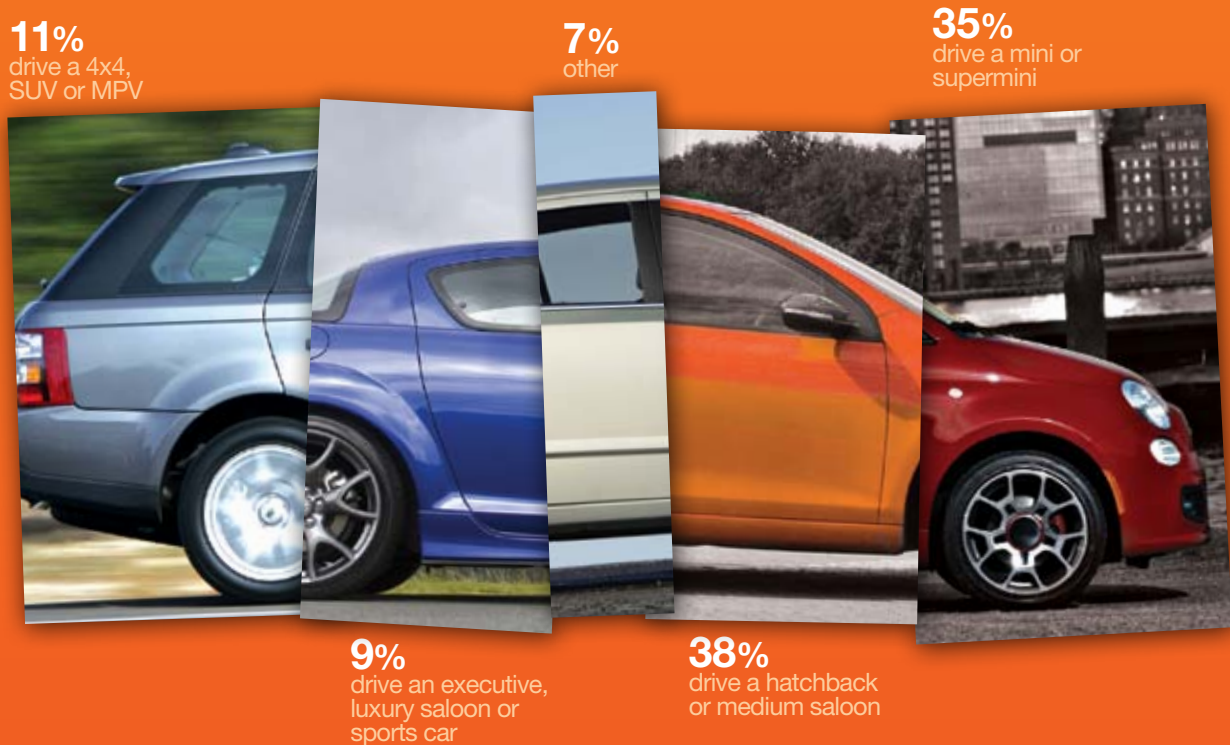
Suburban drivers covering 9,608 miles a year.

Rural drivers covering 10,008 miles a year.

Also according to the Commission for Rural Communities' State of the Countryside 2010 report, drivers living in rural areas drive

approximately 40% further than those in urban areas, but rural people make similar numbers of journeys and spend a similar amount of time travelling – so their journeys are longer and faster³.

Drivers are also combining as many journeys as possible into one regardless of where they live. Over the past twelve months, 70% of people living in rural areas have combined journeys – over half for financial reasons – against 60% and 28% respectively for people living in urban and suburban areas.



2.0 Who is the motorist?

Investment and innovation should be made in areas where alternatives to motoring can make a tangible impact
See page 60 for full RAC calls to action.

2.3 The alternatives

As the number of car journeys has fallen, the number of times public transport has been used over the past twelve months has increased.

38% of drivers have used public transport more for short journeys.

32% of drivers have used public transport more for long journeys.

But again, the options available to people living in towns against those living in a rural location fall into stark contrast.

55% of people living in a city said they chose public transport for short journeys and 45% for longer journeys.

37% of people living in a suburb said they chose public transport for short journeys and 29% for longer ones.

25% of rural dwellers said they chose public transport for short journeys and 26% for longer ones.

These differences clearly reflect the reduced access, availability and affordability of public transport options open to people who live in rural, and to a lesser extent suburban, locations. This is also set to get worse as the amount of investment in public transports falls.

It is worth noting that changes were rarely made for environmental reasons with 7% or less citing it as the main driver of the trends mentioned in the chart opposite.






“We need to understand what the barriers are to people using bicycles and public transport more.”

Robert Gifford
Executive Director, Parliamentary
Advisory Panel for Transport Safety



Walking or cycling/car sharing

	% increasing the amount of walking or cycling they do	% of workers who shared a car with others
 Urban	68% 2010: 60%	20% 2010: 29%
 Rural	44% 2010: 49%	16% 2010: 17%
 Suburbs	46% 2010: 51%	14% 2010: 15%

3.0 What is concerning drivers?

Drivers are a worried group, but money is not the only thing taxing them. The behaviour of other drivers and the state of the roads they drive on are also issues of real concern. >>

3.0 What is concerning drivers?

Fuel duty should be frozen, scheduled inflationary rises scrapped and the Government should revisit the fuel stabiliser.
See page 60 for full RAC calls to action.

But as other concerns take precedence, are drivers getting more relaxed about previous worries? Do older drivers still make their palms sweaty? What about younger ones? And is congestion as bad as they think?

As last year's Report on Motoring revealed, drivers are increasingly concerned with local rather than national issues, and particularly the condition of the roads they drive on a regular basis.

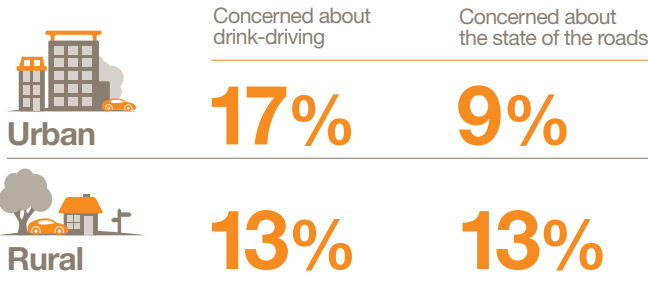
3.1 Top concerns

Unsurprisingly the cost of motoring is top of the list of concerns – up from fourth last year – reflecting the soaring cost of fuel and insurance premiums. Almost a third of drivers said cost was of most concern and

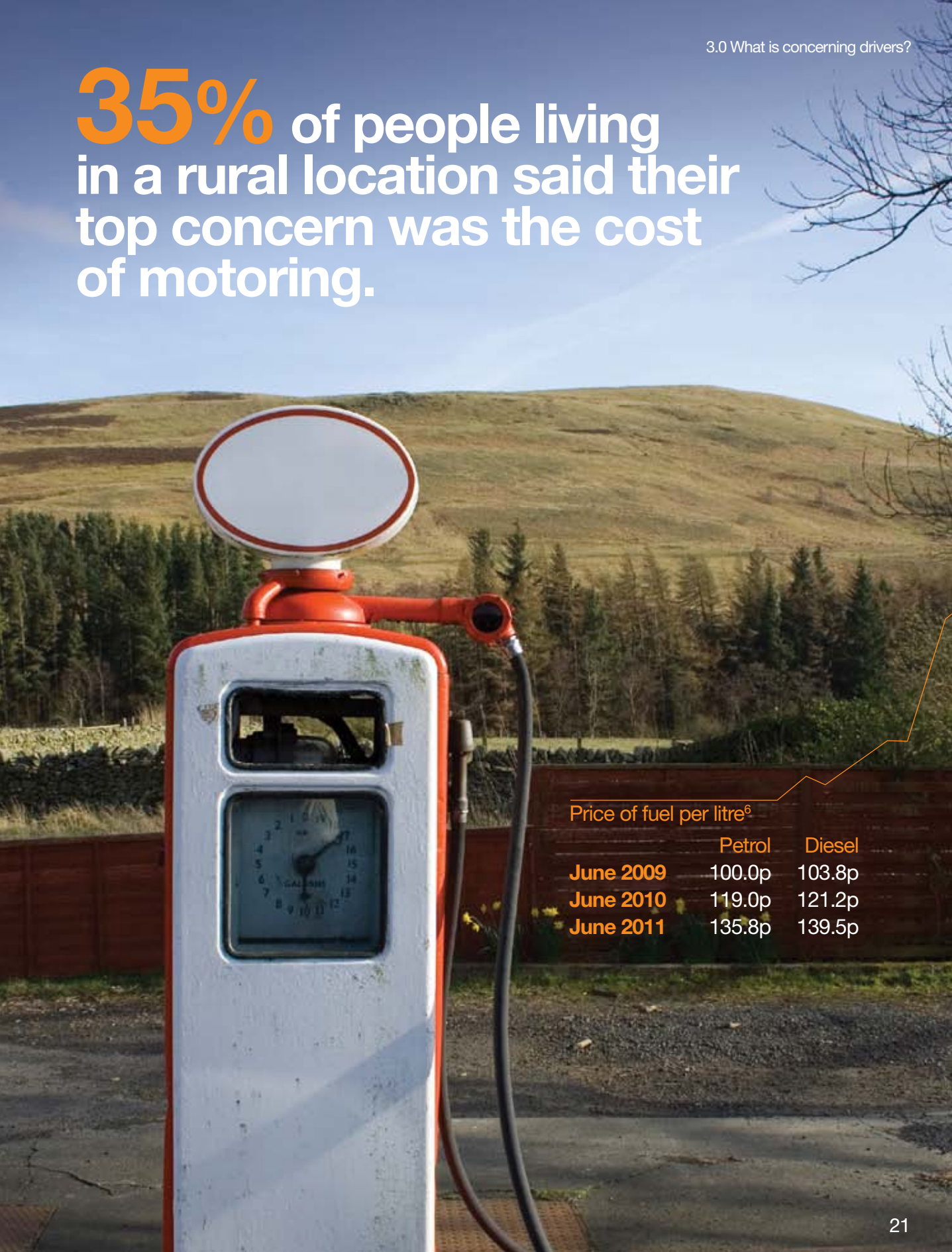
a further third that it was of some concern. But looking deeper, it was of most concern for 35% of people living in a rural location but just 30% of people in cities. According to the Commission for Rural Communities, people in rural areas spend 20-30% more on transport – motoring, taxis and public transport – than people in urban areas⁴.

Concerns about costs also came through in people's worries about the number of people driving without insurance or tax – with three in five expressing some concern about this – and one in ten labelling it the motoring issue they're most concerned about. According to the Motor Insurers' Bureau, uninsured drivers cost honest drivers £500 million in extra premiums – equivalent to £30 on each policy⁵.

Concerned about drink-driving/state of the roads



35% of people living in a rural location said their top concern was the cost of motoring.



Price of fuel per litre⁶

	Petrol	Diesel
June 2009	100.0p	103.8p
June 2010	119.0p	121.2p
June 2011	135.8p	139.5p

4. State of the Countryside 2010, <http://www.defra.gov.uk/crc/documents/state-of-the-countryside-report/sotc2010/>
5. Motor Insurers' Bureau Key Facts, <http://www.mib.org.uk/Media+Centre/en/Key+Facts/Default.htm>
6. Prices as at 1 June. Source: www.petrolprices.com

3.0 What is concerning drivers?

3.2 Not bothered

As the economy has failed to improve significantly over the last year so drivers' priorities have changed. At the bottom of the list:

Only 10% of drivers rated the behaviour of young drivers (under 21) as a top five issue of concern to them.

Only 11% of drivers rated the impact of motoring on the environment as a top five issue of concern to them.

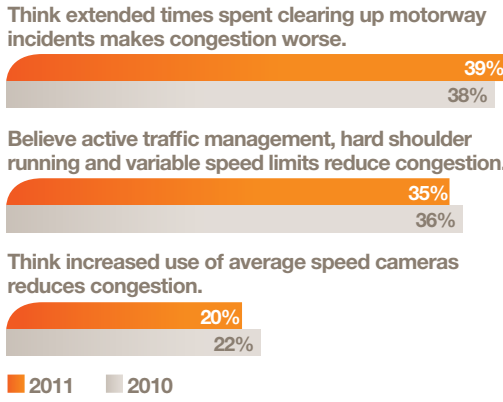
Only 13% of drivers rated the behaviour of older drivers (over 70) as a top five issue of concern to them.

3.3 Congestion

Congestion continues to be a major concern for drivers with 73% believing congestion is worse than a year ago – up from 66% last year – and seven in ten would like to see tough measures taken to reduce traffic levels. Allying this with the fact only 41% of people think local journey times are becoming more predictable and a pattern of concern

begins to reveal itself. This is likely to be an extension of drivers' perception they cannot influence national motor policy, but would like some control over their local roads and the routes they drive most. The belief that congestion is getting worse is not backed up by official statistics. However, everyday journeys such as school runs are unlikely to have improved in the eyes of drivers making them.

Views on measures introduced to reduce congestion have also stayed almost static over the year.




73%

believe congestion is worse than a year ago despite the fact that official figures show congestion has decreased over the past three years



7. source: Inter-urban Congestion Statistics Year Ending March 2011, <http://www.dft.gov.uk/pgr/statistics/datatablespublications/roads/congestion/>

4.0 The necessity of motoring

A photograph of three children in the back seat of a car. The child on the left is a boy in a green hoodie, looking down. The child in the middle is a boy in a striped sweater, looking at a small object in his hands. The child on the right is a girl in a striped shirt, sleeping with a stuffed dog. A surfboard is visible in the background through the car window.

People drive because they have to – take children to school, go to work, for shopping or to visit friends and relatives. But the high cost of fuel is making them scrutinise every journey they take to make sure it is necessary and more importantly affordable. >>

4.0 The necessity of motoring

So what are drivers doing about the increased costs? Are they driving less? What areas are they cutting back on to keep bills manageable? And how are these strains impacting on different sections of the motoring population?

One of the most interesting revelations within the research is that while people are happy to car share when children are young, they revert back to solitary trips once they are no longer required to act as ‘mum and dad’s taxi’. This is supported by the fact only 16% of drivers participated in car sharing with colleagues in 2011.

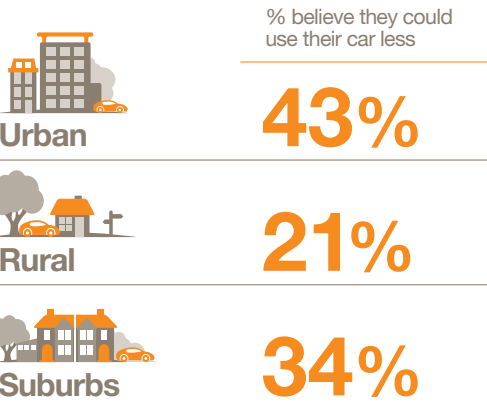


4.1 Unavoidable journeys

A third of drivers still believe ‘most people in cars could use public transport instead’ – which has been constant for the last four years. But equally, almost four in five would find it ‘very difficult to adjust my lifestyle to being without a car’ – again a consistent view over the last few years.

Similarly in terms of using their own cars less, this would be very difficult for 86%, 69% and 80% of drivers in rural, urban and suburban locations. This car dependence is also reflected in the fact that 65% of urban car drivers believe motoring will become a luxury activity for them if prices continue to escalate against just 56% of suburban and rural drivers.

Using cars less



4.2 Rural versus urban drivers

Urban drivers have options that are just not open to those living in rural areas, and this is a key gripe that rural drivers have against the Government. Policies do not appear to take into account the differing transport issues faced by people in their own locality. The Government wants people to drive less, but cuts to budgets both on a local and national level may impact upon the availability of subsidised public transport for both young and old people. There seems to be a distinct lack of joined up thinking.

According to The Commission for Rural Communities’ State of the Countryside 2010 report 96% of households in urban areas have an hourly or better bus service within 13 minutes walk compared with 50% in rural areas. Furthermore 77% of those eligible in urban areas have benefited from concessionary fares compared with 53% in rural ones⁸. This again suggests rural drivers have fewer public transport options so do not bother to apply for concessionary fares.

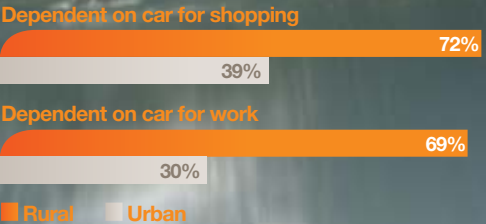
The Report on Motoring this year looked at exactly what journeys drivers would find difficult or impossible to make without a car. It reveals:

More than half of motorists who use their car to transport children to school and other activities could only do this by car. 60% of rural drivers could not make these journeys without their car compared to 39% of urban drivers.

The urban/rural split is even more noticeable when it comes to other family commitments such as visiting or transporting elderly relatives.

Overall 65% could only do this by car, but 80% of rural drivers have no other option, against 66% of suburban drivers and 44% of urban drivers.

Drivers living in rural areas are also more reliant on their cars for shopping and commuting.



8. State of the Countryside 2010, <http://www.defra.gov.uk/crc/documents/state-of-the-countryside-report/sotc2010/>

4.0 The necessity of motoring

Worryingly if the cost of fuel continues to rise, increasing numbers of drivers feel they will have to stop undertaking these journeys leaving many of them feeling increasingly isolated as they are unable to visit friends and family and maintain their social life – 39% of drivers say they could only maintain their current social life using their car. For rural motorists, this figure rises to 56%.

There is also an economic impact as local retailers and leisure venues such as gyms and restaurants suffer from loss of trade. In extreme cases, motorists may be forced to give up their jobs and look for more local work as the cost of petrol or diesel makes the commute unaffordable.



“The really big losers at present are young people.

Yes, public transport is being cut back for all, but another cost-cutting measure is the removal of many concessionary fares for youngsters – it’s a simple cost saving measure but amounts to a significantly increased charge for young people to use public transport.”

David Leibling
Transport and Motoring Consultant

9. ‘Unacceptable’ fuel prices forcing drivers out of their cars, 24 February 2011 <http://www.rac.co.uk/press-centre/press-releases/>

11%

serviced or repaired
their car themselves

4.3 Saving money

Combining journeys is not the only thing drivers have done over the last year to keep their costs down. Almost two in five have changed their driving style to become more fuel efficient and reduce costs. Breaking this down, 42% of rural drivers, 39% of suburban ones and 31% of urban ones changed their habits, perhaps reflecting the decreasing level of mileage each group drives, as documented earlier.

21% of drivers waited longer between services to save money.

11% serviced or repaired their car themselves.

12% bought a smaller vehicle over the last year.

6% reduced the number of cars in their household.

3% sold their car and opted to use other modes of transport.

“I couldn’t manage
without my car because...

I live in a village and there is not a very good public bus service for where I want to go.”

Glenis Soanes

I cannot transport elderly relatives without a car, my family is well spread over the UK.”

Sheila Atkins

I go to places that are not on the bus or train route.”

Tony Longhurst

I live in a rural area and need a car to get out for socialising. My family do not live nearby and as I live in a rural area, buses are not regular and trains do not exist here.”

Susan Yuill



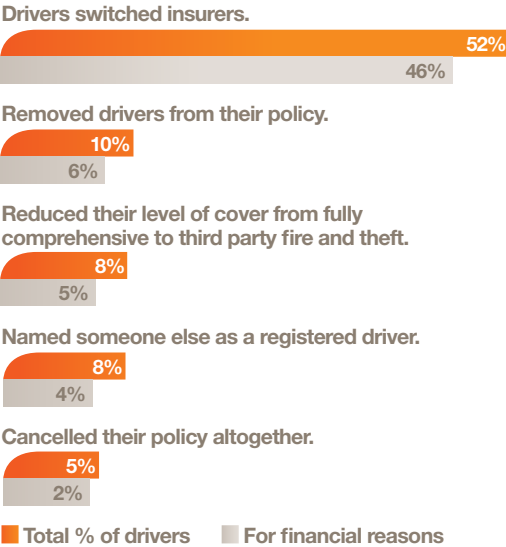
4.0 The necessity of motoring

4.4 Insurance

Fuel is not the only thing pushing up the cost of motoring; insurance premiums have soared by over 40% this year, adding further pain for motorists. This has led to an estimated 4% of people driving without insurance¹⁰. A key reason for the price increase is the soaring cost of personal injury claims.

To save money 8% of motorists have named another person as their vehicle's registered main driver. This process can invalidate insurance cover and depending on circumstances can be illegal – a practice known as 'fronting'. A further 8% of drivers have reduced their level of cover in an effort to save money. The increase in premiums is likely to get worse with no sign of prices levelling out, and the anticipated effect of the European Court ruling against gender discrimination hitting price-sensitive sectors of the motoring public.

Over the last 12 months:



10. Uninsured drivers face new crackdown, 11 January 2011 <http://www.mib.org.uk/Media+Centre/en/Press+Releases/Default.htm>
11. European Court of Justice gender ban is disappointing news for UK insurance customers, 1 March 2011, <http://www.abi.org.uk/Media/Releases/default.aspx>



‘Stay Insured Stay Legal’– Cracking Down on Uninsured Drivers

In May, the Department for Transport, DVLA and Motor Insurers’ Bureau combined forces to unveil a new campaign, Continuous Insurance Enforcement, aimed at tackling the issue of uninsured drivers on the roads. Under new laws that come into force in June, not only will it be illegal to drive without insurance but it will also be illegal to keep a vehicle without insurance unless declared as ‘off the road’ to the DVLA. To monitor and police this, the MIB will be able to track the ownership and insurance status of every vehicle in the UK.

European Court of Justice Ruling

In March, the European Court of Justice in Luxembourg upheld an ‘opinion’ by one of its advocate generals that it was discriminatory to ask the gender of an applicant for any form of insurance. The ban comes into force in December 2012 and research from the Association of British Insurers suggests women under the age of 25 will then see their premiums rocket by as much as 25%, while premiums for men under 25 will only fall by 10%¹¹.

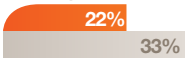
4.0 The necessity of motoring

4.5 Company car drivers

Company car and business drivers naturally use their cars more than private motorists, with 93% using it every or most days, against 71% of other motorists. Their cars are also younger, with an average age of 2.4 years against private cars at 5.9 years old.

Company and business drivers have different views and concerns to other motorists.

Are most concerned about the cost of owning and running a car.



Are most concerned about congestion and slower journey times.



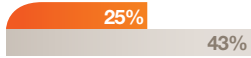
Disagree with the statement 'most people in cars could use public transport'.



Would find it very difficult to adjust their lives to being without a car.



Think local journey times are becoming more predictable.



Company car drivers Private car drivers

Clearly these findings reflect the importance these drivers put on their cars and the use of them for their work as well as their daily lives.



Attitudes of company car drivers versus rest of population on key issues

	Company car drivers	Private car drivers
Believe the drink-drive limit in the UK should be dropped to from 80mg to 50mg (the equivalent of one pint of beer).	27%	24%
Agree that the maximum speed limit on Motorway should be increased to 80mph.	64%	47%
Will have to severely reduce their car usage if the price of fuel continues to rise.	38%	69%
Are confident driving in adverse weather conditions.	76%	56%



4.0 The necessity of motoring

More information is needed on the long-term cost-savings achievable from using alternatively powered vehicles.
See page 60 for full RAC calls to action.

4.6 Future of motoring

Only a quarter of drivers would consider buying an alternatively powered vehicle such as a hybrid, electric or hydrogen car as their next car, down from 34% last year.

But why are environmental concerns so far off drivers' radars?

49% said price was the biggest barrier, up from just over a third last year.

30% said they would only buy an alternatively powered car if it was cheaper to run than a conventional one – up from 23% last year.

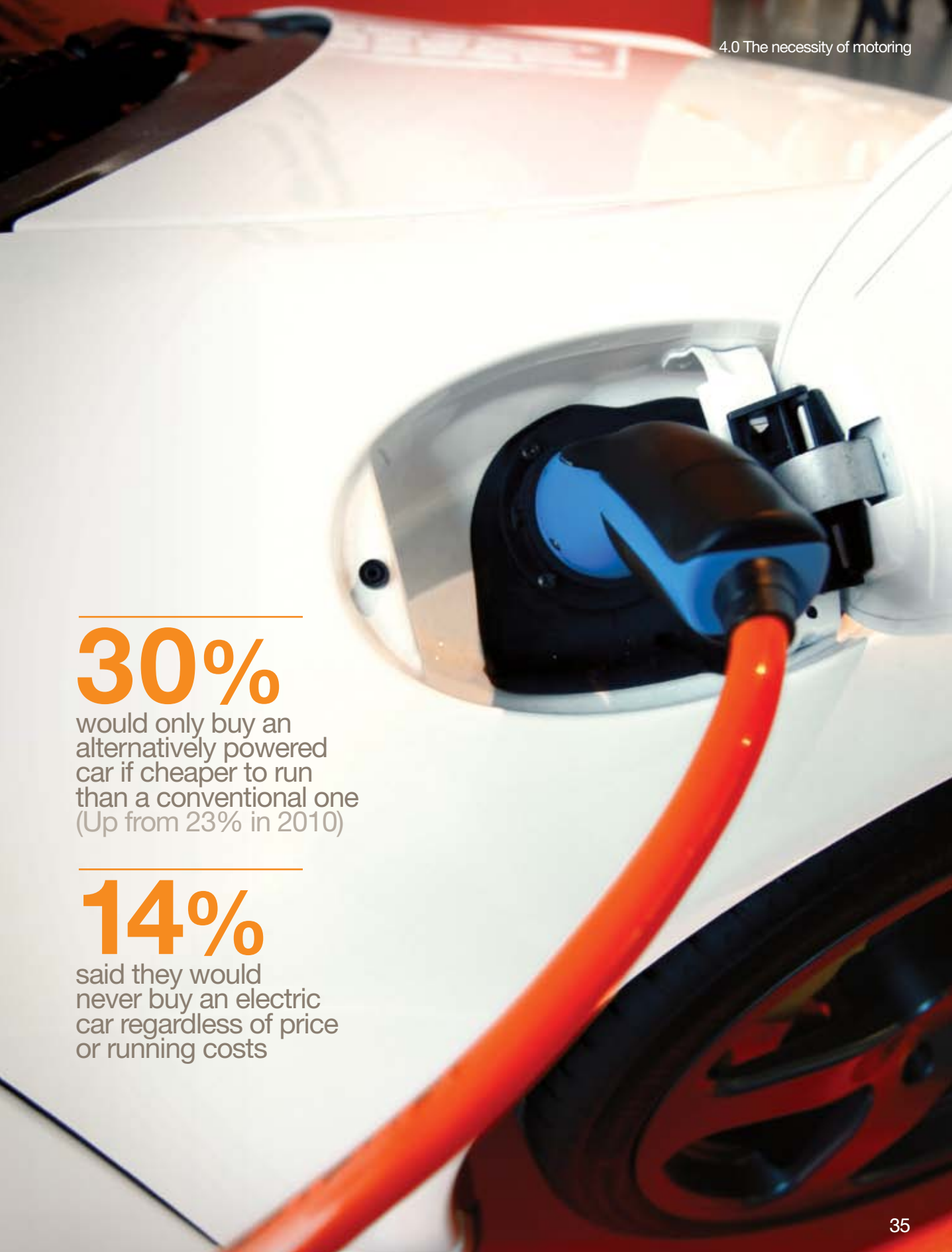
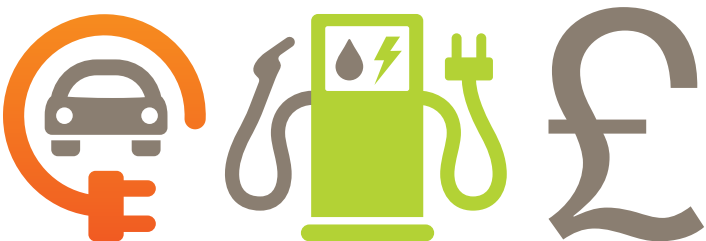
Concerns also remain about the logistics of running an electric car.

36% wanted more charging points.

35% would want a longer range, with 24% requiring a car to travel at least 200 miles before it needed recharging.

A hard core 14% would never buy such a car regardless of its price and running costs.

Clearly, cost remains the key factor for drivers. More widespread take-up of alternatively powered vehicles will therefore likely not be achieved until prices are reduced.



30%

would only buy an alternatively powered car if cheaper to run than a conventional one (Up from 23% in 2010)

14%

said they would never buy an electric car regardless of price or running costs

5.0 State of the roads

Most drivers think the roads they drive on are a disgrace. There are potholes and constant road works and no obvious plan – joined up or otherwise – to improve the situation. >>

5.0 State of the roads

But is this different to a year ago? Do they honestly believe the Government should divert what little cash it has away from hospitals and schools into transport? And do they think they pay too much in motoring taxation for the service they get?

5.1 Lack of investment

More than three quarters of drivers still believe they are being treated as a cash cow, though 1% do think the 'war' has ended and 8% think the Government is serious about ending the 'war on motorists', but hasn't done anything about it yet.

They also think the quality and condition of all roads has deteriorated over the last year – with:

92% believing this is true of local roads.

78% believing this is true of motorways and main roads.

Geographically this is felt by:

94% of rural drivers about local roads, by 92% of suburban drivers and 88% of urban ones.

83% of rural drivers about motorways and main roads, by 78% of suburban drivers and 73% of urban ones.

5.2 Taxation

The level of motoring tax has always been contentious, with the vast majority of drivers thinking they are overtaxed compared with the amount of money reinvested in the road network and transport in general.

This year however, drivers are more pragmatic in their views. Six in ten drivers now think the level of tax paid is not a fair price for their motoring freedom – up from less than half last year. Meanwhile, 61% think more taxes should be reinvested back in public transport – down 6% from 2010.

“The Government is interested in long-distance travel...

and tackling that, but the priorities coming through in this research are about local travel. Motorists want local solutions, but the Government isn't interested and is leaving it entirely to local authorities.”

Stephen Joseph
Executive Director, Campaign for Better Transport

The Government should create a national framework to ensure consistent maintenance standards on local roads by local authorities
See page 60 for full RAC calls to action.

5.3 Priorities for investment

Drivers want smarter use of the limited transport funds available. They want the Government to make good its promise to give more freedom to choose where the money is spent to local authorities as promised in the Spending Review.

Top priorities this year are:

84% of drivers want the maintenance of existing local roads to be prioritised.

71% want targeted improvements to local roads to be prioritised.

70% want the maintenance of existing motorways to be prioritised.

62% want investment in winter weather equipment to be prioritised.

Further down the list:

42% want improvements to local rail services to be prioritised.

39% support the building of new bypasses and dual carriageways.

Bottom of the list are:

A new high speed rail link from London to Birmingham and the North – supported by only 14%.

Additional capacity at London airports – supported by only 4%.

Additional capacity at regional airports – supported by only 7%.

84%
of drivers want the maintenance of existing local roads to be prioritised.

5.0 State of the roads

Government should investigate the removal of barriers to local communities assisting the authorities in tackling adverse weather.
See page 60 for full RAC calls to action.

5.4 Winter weather

Although lessons were learned from the snow at the beginning of the year, drivers would still like more to be done. Almost one in four stated the authorities' lack of preparedness for the extreme weather conditions was of real concern and almost two thirds want more investment in snow ploughs and other snow clearing machinery.

In terms of actually driving in the snow:

67% make sure they are prepared with shovels and blankets – rising to 74% for people in rural locations.

59% are confident driving in adverse weather conditions.

Perhaps in line with the 'Big Society' theme, 80% would like to see the Government incentivise farmers and others to keep local roads clear during adverse weather conditions with 84% of rural drivers and 78% of suburban and urban drivers wanting this.

Transport Select Committee Report on Winter Weather

In May, the Transport Select Committee published its report, 'Keeping the UK Moving: The impact on transport of the winter weather in December 2010'.

The Report recommended additional investment and coordination by Government to minimise the impact of future adverse weather. Further recommendations include:

The launch of a high profile campaign to increase the proportion of motorists taking precautions for driving in winter weather.

The final version of the Department for Transport's Climate Change Adaptation Plan to refer to the future risk of severe winter weather.

Improved aid and better electrification of the rail network south of the River Thames.

Co-ordinated airport planning for major incidents including snow chaos.

Provision of better online advice for people about tackling problems arising from severe winter weather.

An investigation of the case to provide the Met Office with more money to improve its long range forecasting capability¹².



“Do the problems of recent winters suggest that a more fundamental change in approach is required? Does it make sense for UK plc to invest significantly more to prepare for winter weather conditions, or would that be disproportionate to the likelihood and cost of disruption?”



The Secretary of State for Transport, Rt. Hon. Philip Hammond MP, giving evidence to the Transport Select Committee's Report on Winter Weather.

12. Keeping the UK moving: The impact of the winter weather in December 2010, <http://www.parliament.uk/business/committees/committees-a-z/commons-select/transport-committee/news/>

6.0 Road safety and law abiding drivers

The vast majority of drivers consider themselves law abiding, but believe other road users flaunt the rules by drink driving, breaking speed limits and texting while behind the wheel. >>

6.0 Road safety and law abiding drivers

But are ‘other drivers’ really that bad? Is there a hard core of drivers who will not obey speed limits and have one too many before setting out on their journey? And if yes, who are these drivers?

Almost six in ten drivers believe that that there are not enough police on the roads to act as a deterrent’. 24% also believe they are unlikely to be caught if they break most motoring laws, perhaps the ‘hard core’ of persistent offenders?



“According to our research,...

the main cause of motoring accidents is definitely driver distraction – the ‘look but don’t see’ issue¹⁴. Breaking the speed limit isn’t as big a cause of accidents as it’s made out to be.”

Simon Best
Chief Executive, Institute of Advanced Motorists

The Government’s Road Safety Strategy

The Department for Transport launched their Strategic Framework for Road Safety in May with Secretary of State for Transport Philip Hammond declaring that Britain already has “a road safety record that is the envy of the world”, but also that he believes “our roads can be safer still”¹³. This was launched on the same day as the UN’s Decade of Action for Road Safety.

The key points of the Government’s Road Safety Strategy include:

1. A focus on education to help support the majority of law-abiding drivers in the UK to improve their driving skills.
2. Greater enforcement of the law on the minority of drivers who deliberately and persistently break the law.
3. New fixed penalty fines for police to fine careless drivers.
4. Motorists who re-offend to get mandatory retraining and a new test to demonstrate their improved level of skill to insurers.
5. Greater enforcement and rehabilitation schemes for drink- and drug-drive offenders.
6. Targeting uninsured drivers through continuous insurance enforcement and more appropriate penalties for those caught uninsured.



13. Strategic Framework for Road Safety, <http://www.dft.gov.uk/pgr/roadsafety/strategicframework/>
14. Licensed to skill: Contributory factors in road accidents, http://www.iam.org.uk/policy_and_research/policyaresearch.html

6.0 Road safety and law abiding drivers

6.1 Speeding

Britain was the first country to impose a maximum speed limit of 10mph in the 1861 Locomotive Act. But are limits, some of which were last updated more than 75 years ago, still relevant?

The majority of people are happy with speed limits on slower roads but only 28% think motorways should be restricted to 70mph. Almost half would like to see the limit raised to 80mph and 16% to 90mph.

But despite being happy with the limits, motorists do still speed – though not as much as they used to.

Two thirds admit to breaking the speed limit on motorways down from 73% last year. 24% admitted doing this on most journeys this year.

Half of drivers admit to speeding on 30mph roads down from 57% last year.

38% admit to speeding on 20mph roads – down from 44% last year.

38% also speed on country roads – down from 45% last year.

Drivers between the ages of 17-24 are mostly likely to speed on all four types of roads. 38% admit they are regular speeders.

It is interesting to note the percentage of people admitting to speeding has fallen quite significantly over the year. Whether this is because there is more acceptance of limits or because they are conserving fuel by driving more slowly will only become clear when the economy starts to recover.

History of speed limits

1934



30mph limit introduced for roads in built up areas.

1965



70mph restriction for all roads including highways and motorways.

1977



70mph limit for motorways and dual carriageways and 60mph for single carriageways.

1992



20mph limit introduced for urban, often residential areas¹⁵.

The Government should consider raising the speed limit to 80mph on some sections of motorway based on considerations of construction, usage and safety implications.

See page 60 for full RAC calls to action.

Speed Cameras in Oxfordshire

All 72 fixed sites and 89 mobile speed cameras were turned off in Oxfordshire on 1 August 2010 after the County Council had its road safety grant cut, and would not pay its £600,000 share of funding. But after a 50% increase, to 18, in road deaths in the following six months they were reactivated on 1 April this year¹⁶.

15. Understanding Speed Limits, <http://www.safermotoring.co.uk/UnderstandingSpeedLimits.html>

16. Road deaths rise after speed cameras switch-off, 26 March 2011, www.oxfordmail.co.uk/archive/2011/

6.0 Road safety and law abiding drivers

6.2 Enforcing speed limits

So what can be done to make people observe the speed limit?

When asked what would make them personally slow down:

45% said a higher likelihood of getting caught.

39% a built-in speed limiter in their car.

29% more average speed cameras.

26% higher fines.

More than eight in ten people also supported more severe penalties for excessive or regular speeders than those just over the limit. Only a quarter felt the current system of punishment worked well.

On a wider scale:

78% of people think more police patrols would make the roads safer.

74% think more speed awareness signs would make the roads safer.

71% think in-car speed limiters would make the roads safer.

59% think more average speed cameras would make the roads safer.

41% of drivers support variable speed limits based on the time of day or night. These already exist outside some schools and on a number of motorways.

Local Authorities should conduct audits of their speed cameras to ensure they are best-placed to minimise crashes.

See page 60 for full RAC calls to action.

6.3 Drinking and drugs

Driving while under the influence of any substance that impairs driving, whether legal or illegal, is seen as socially unacceptable by the vast majority of drivers. But there is a proportion of drivers that do break the law in this way and young drivers aged 17-24 are most likely to have driven or been driven under the influence of both drink and drugs.

The statistics again reinforce the view that there is a hard core of drivers that knowingly flout the law, be it on speeding or drink- or drug-driving. This could be why so many motorists would like to see better enforcement of existing laws to act as a deterrent to this group.

Drink driving habits



6.0 Road safety and law abiding drivers

6.4 Enforcing drink/drug limits

The majority of drivers know what the current drink driving limit is through the units of alcohol they can drink rather than the number of milligrams of alcohol in their blood. They also support better application of existing laws, assuming that most people know, like themselves, when they are over the limit. And three in five want to see harsher penalties for those excessively over the limit, compared to those just over.

Want stricter application of sentencing within current laws for seriously injuring or killing someone.



Want better education on the perils of drink-driving for learner drivers.



Want more information on drink-driving limits.



Want in-car anti-drink-drive technology for repeat offenders and those caught excessively over the limit.



Want more random breath testing of drivers on the roads.



2011 2010

Again this year, drivers would like to see the drink-drive limit lowered – with 42% wanting a zero limit, and a further 24% a reduction to 50mg per 100ml of blood. Only a small proportion of drivers (18%) support the current 80mg limit. It is all the more surprising the Government decided to keep the current limit despite the recommendation in the North Report. There is common agreement that better enforcement is needed but Government felt that lowering the drink driving limit would not tackle the underlying problem of those excessively over the limit.

Government has agreed with proposals in the North Report to introduce better testing equipment and processes for people suspected of both drink- and drug-driving and streamline enforcement of drink- and drug-driving laws. It is also examining the case for a new drug-driving law.



Random breath testing should be increased to target repeat and excessive drink-drive offenders.
See page 60 for full RAC calls to action.



“Regardless of the outcome of the North Report we need to make sure there is proper enforcement of the worst offenders, even with the limit staying at 80mg.”

Professor Stephen Glaister
Director, RAC Foundation

The North Report

Written by Sir Peter North and published in June 2010, the North Report into drink- and drug-driving proposed among other things reducing the drink-drive limit to 50mg¹⁷. The Government published its response to the Report in March. While accepting some of the recommendations, they declared that the drink-drive limit would remain at 80mg rather than being reduced to 50mg as proposed. Instead, the Government stated that they would “focus on improving enforcement and education to tackle the drink- and drug-drivers who put lives at risk”¹⁸.



17. Independent North Review of Drink and Drug Driving Law, <http://webarchive.nationalarchives.gov.uk/>
18. The Government’s Response to the Reports by Sir Peter North CBE QC and the Transport Select Committee on Drink and Drug Driving, <http://www.dft.gov.uk/pgr/roadsafety/drivinglaws/govtresponse/>

6.0 Road safety and law abiding drivers

6.5 In-car distractions

One of drivers’ biggest concerns is the behaviour of other drivers – and particularly the activities they carry out which take their minds off the road.

Distractions appear to fall into two camps – acceptable and unacceptable ones. Ones deemed acceptable, such as talking to passengers are admitted by 96% of drivers both while driving and stationary at lights, as is adjusting in-car controls such as the heating or radio done by 93% of drivers. But unacceptable ones such as texting and using a mobile without a hands free kit are still undertaken by a sizeable and worrying minority. These drivers are also likely to be younger and less experienced adding to the risk of distraction.

For example while behind the wheel over the last 12 months:

27% of drivers use a mobile without a hands-free kit – though 15% say only while stationary at lights – even

though both are illegal. But 37% of 17-24 and 38% of 25-44 year olds admit to doing this.

27% of drivers text while driving – 19% only while stationary. But 53% of 17-24 years olds have done this.

9% have done their make up or shaved – 21% of 17-24 year olds and 15% of 25-44 year olds.



have accessed their email, Facebook or other social networking sites or other apps on their phone.

24% of 17-24 year olds accessed email, Facebook or other social networking sites

20% of 17-24 year olds accessed other apps

12% of 25-44 year olds accessed email, Facebook or other social networking sites

12% of 25-44 year olds accessed other apps

As mentioned earlier almost half of drivers are concerned about other people using their mobiles without a hands-free kit while driving.

Enforcement of the law on mobile phone usage must be more rigorous and visible to act as a credible deterrent.

See page 60 for full RAC calls to action.



In-vehicle clutter...

“Vehicles fitted at the time of manufacture with Sat Navs and iPods have the safer advantage of these working through the main controls, causing less distraction. Compare this with the challenge of using the in-vehicle clutter of Bluetooth connections, Mobile Phones and Sat Navs while driving and trying to concentrate on the road ahead.”

Paul Everitt,
Chief Executive, Society of Motor Manufacturers and Traders



53%
of 17-24 year
olds have texted
while driving

7.0 Generation gap – older and younger drivers' views



In 2009 and 2010, the Report on Motoring examined the issues facing younger and older drivers, as well as their attitudes on key areas of motoring. How have the views of these two groups changed in 2011, and what do other motorists think about the subject of driving later into life? >>

Attitudes towards elderly drivers

41%

agree that elderly drivers should be allowed to decide with their families when it is time for them to stop driving

70%

agree that drivers should have compulsory medical checks at 70 years old and at regular intervals thereafter

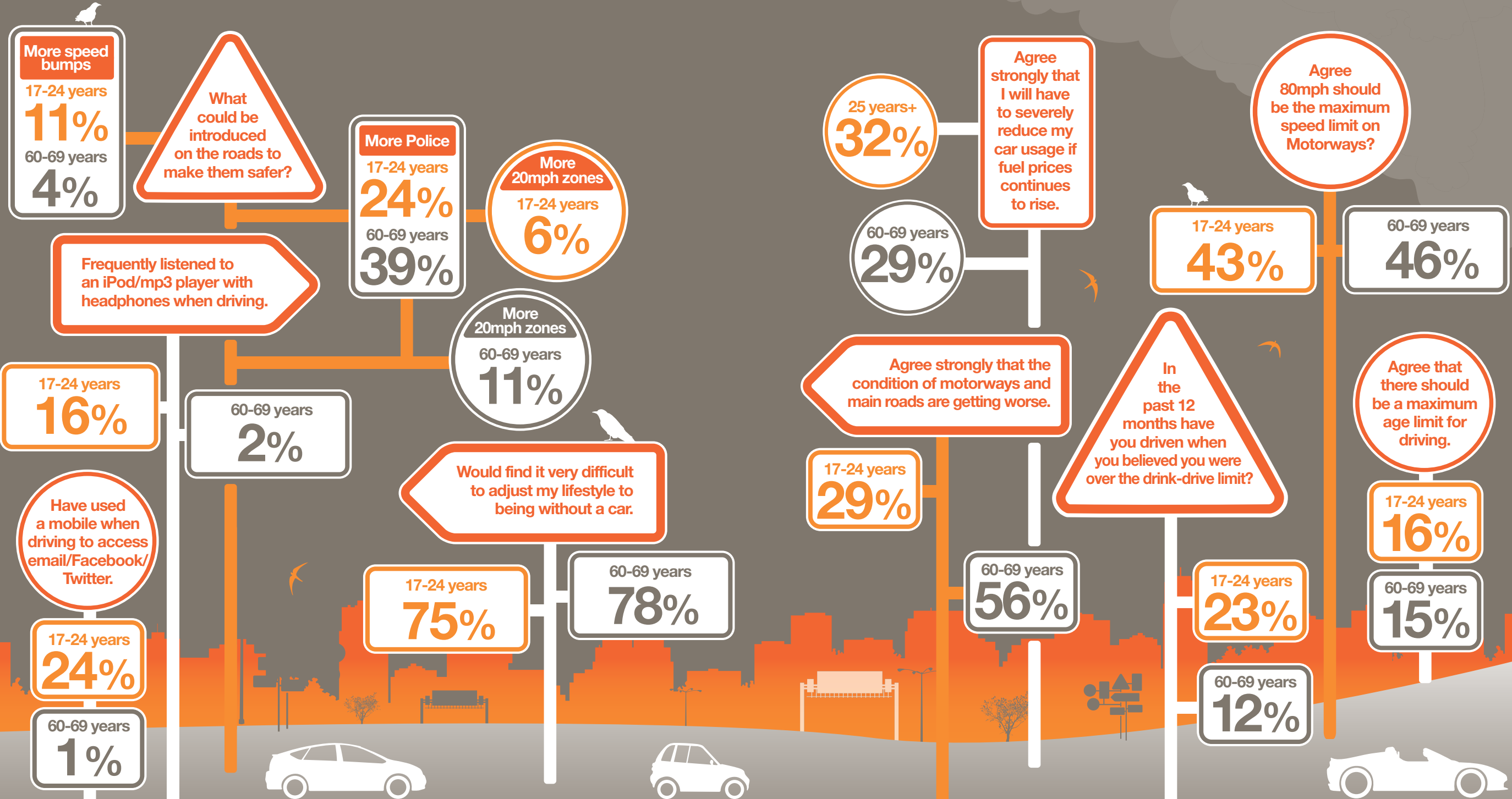
62%

agree that drivers should have compulsory driving evaluations at 70 years old and at regular intervals thereafter

24%

agree that there should be a maximum age limit for driving

7.0 Generation gap – older and younger drivers' views



8.0 Conclusion

Motoring is a necessity for the majority of drivers. But as this year's Report shows it is rapidly becoming an unaffordable one. Economics has become the number one concern for drivers in every aspect of their motoring, from the number of journeys they make to how fast they drive. >>

This overriding concern means other issues have become less important. Last year's Report saw drivers becoming disillusioned with the wider world around them. This year drivers are resigned to the fact nothing they say or do seems to make any difference to transport policy or the costs they must pay to use their car. But the quest to make ends meet financially appears to mean they care less about this disenfranchisement than they did 12 months ago. When they do make demands they are moderate and in keeping with the general environment of austerity.

However, Government does need to factor into policy the effect of the high cost of motoring on different sectors of society, a finding highlighted for the first time in the annual Report on Motoring this year. Unsurprisingly, people living in rural areas are much more dependent on their cars than drivers in urban or even suburban areas. They spend more of their income on motoring costs and have much less opportunity to get out of their cars and use other modes of transport. But it is the stark choices they have to make, about when and where they use their cars, which could cause issues in the future.

If they can no longer afford to drive to work they could be forced to give up their jobs and claim unemployment benefit from an already cash-strapped State. And if they can no longer afford to visit friends and relatives, the psychological effects could be immense as people feel isolated and abandoned by society.

Drivers do want some change – but the priority is local change. However for this to happen, the Government needs to put together a national framework for transport which focuses on the local needs of drivers and then allow local authorities to get on and implement these changes in light of local motoring needs, while making sure policy remains joined up across the country.

Government should also bear in mind drivers want the available money spent on maintaining local roads and motorways rather than on building new ones. Any new investment in transport infrastructure should improve local situations such as reducing local bottlenecks.

Drivers are also looking to the Government to provide better enforcement of existing motoring laws. They are still concerned about other drivers' behaviour especially usage of mobile phones without a hands-free kit and uninsured drivers.

While a significant and growing minority do not believe they will get caught breaking motoring laws and the majority believe there are not enough police on the road, this desire for better enforcement continues. More visible and high profile policing is needed to make sure the minority that flout the laws are deterred.

Very few drivers believe the 'war on motorists' has ended, though it may have become a 'cold war' with some high profile initiatives aimed at gaining popularity with motorists while not impacting on the Treasury. But drivers seem resigned to this. However they do want the Government to improve their driving lives within its constrained budgets, but most importantly they want it to recognise the impact their financial measures are having on their lives and wellbeing.

Like the Government itself, drivers have a finite amount of money they can afford to spend on transport and that limit is rapidly being reached. If prices continue to rise unhindered, the implications for both drivers and wider society will be huge, potentially slowing the recovery and certainly causing hardship for millions of drivers and their families.

RAC calls to action

Fuel challenges

Fuel Duty: With UK drivers already paying the highest duty and tax on fuel in Europe by some margin, RAC would like to see at the very least, fuel duty frozen, and the scheduled inflationary rises scrapped.

Fuel stabiliser: RAC believe the Government should revisit the stabiliser and look at alternatives that actively help reduce/control the price at the pumps. For example, a mechanism that reduces fuel duty and is funded by additional revenues from VAT and North Sea oil taxes arising from further crude oil price increases.

Regulation of fuel pricing: RAC believes the Government should consider either extending the remit of OFGEN and/or holding a public enquiry into the issue of transparency of forecourt pricing.

Investment

RAC would like to see investment and innovations in areas where alternatives to motoring can make a tangible impact e.g. developing safe cycling routes, maintaining concessionary and free fares, increased parking at train stations, and continued availability of park and ride.

Maintenance

RAC believes the Government needs to create a national framework to ensure local authorities maintain similar roads to the same consistent standards.

RAC recommends long term repairs of pot holes using Government funding to best effect as compared to short term solutions which fail in the next cold spell.

Winter challenges

RAC calls on the Government to remove barriers to local communities assisting in tackling problems of adverse weather conditions in their local areas.

Speed

RAC wants the Government to consider raising the speed limit to 80mph on those stretches of motorway where their construction and usage patterns are such that the benefits to users would offset any safety or environmental implications.

RAC calls on Local Authorities to do an audit of their speed cameras (fixed and average) to ensure they are correctly located to minimise crashes.

Drink-driving

With the Government's decision to keep the drink-drive limit at 80mg per 100ml of blood, RAC calls for increased random breath testing to target excessive offenders through more robust enforcement of the existing laws plus increased education on the morning after effect.

Distractions

RAC wants Government to encourage all those involved in social media to push the road safety message with regards to in-car phone usage and other causes of driver distraction.

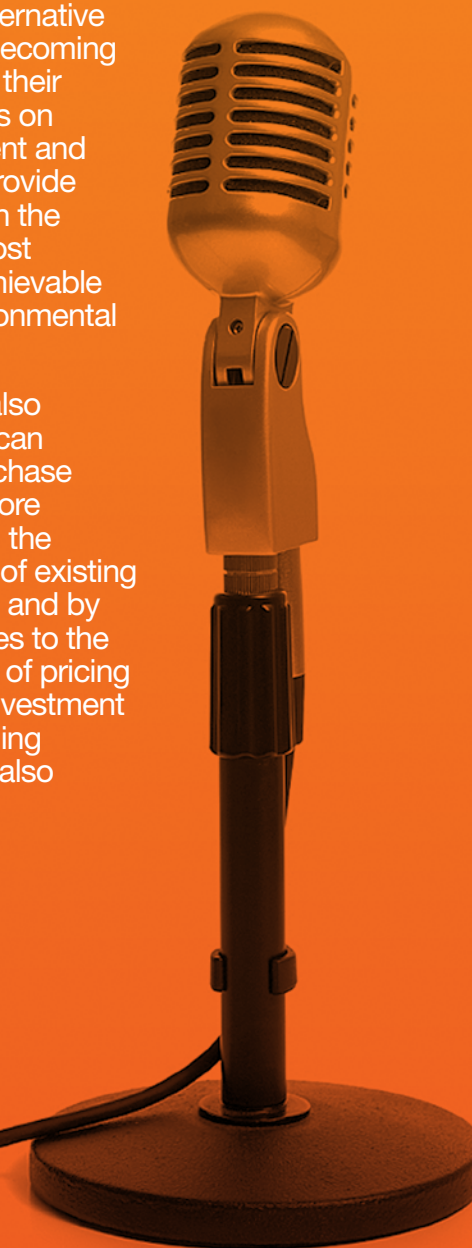
RAC calls on the Government to rigorously enforce the law on mobile phone usage and continue to increase the numbers being caught as a visible and proven deterrent. Businesses should also be asked to step-up their efforts to educate and monitor their workforce.

Alternative vehicles

With the price of alternative powered vehicles becoming more of a barrier to their purchase, RAC calls on both the Government and manufacturers to provide more information on the overall long-term cost savings that are achievable as well as the environmental benefits.

Both parties must also consider how they can make the initial purchase of these vehicles more accessible, through the potential extension of existing Government grants and by exploring alternatives to the traditional methods of pricing and buying a car. Investment in refuelling/recharging infrastructure must also remain a priority.

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



Research methodology

‘RAC Report on Motoring 2011’ 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 February and March 2011, 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 11 to provide sufficient numbers for analysis of this group (resulting in a total of 101 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 affect 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 motorists’ needs.

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

RAC awarded a Which? Best Buy for Breakdown Cover – August 2010

RAC Insurance has also been awarded the Best Overall Vehicle Insurance Provider 2010/11 by [themoneypages.com](#)

RAC is part of Aviva, the world’s sixth largest insurance group, serving 53 million customers across Europe, North America and Asia Pacific.

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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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