



RAC



RAC Report on
Motoring 2014
Britain on the road

RAC Report on Motoring

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Foreword

Suzi Perry

Suzi Perry is one of the UK's top motor sports correspondents and presented MotoGP for 13 years before taking the helm as anchor on Formula One for the BBC in 2013. She also presented Channel 5's The Gadget Show. Her personal style has won her many accolades and fans and Suzi is adept at communicating her passion for all things motor sports and technology.



It has been another challenging year for Britain's motorists with some significant milestones. Motorists have faced atrocious weather, pothole-ridden roads and the threat of new insurance scams, and yet we are still reluctant to give up the freedom our car offers.

Whether driving a Challenger 2 tank or flying in a Typhoon fighter jet and breaking the sound barrier, being on the move at whatever speed is an overwhelming passion of mine. I regard the days I passed my driving test and, later, my motorbike test as two of my happiest. Both were a big step to freedom and gave me an overwhelming feeling of independence.

I have loved every vehicle that I owned and I love motoring but I am not averse to jumping on a bus on occasions or taking the train, and I will even hop on a bicycle once in a while.

So I find the concept of the multi-modal motorist fascinating. Increasingly, motorists are facing tough choices about how they travel to work, to see their friends and family or to just do the weekly shop, and so we can all learn from this insight into what motivates our choices and who is the most reluctant to use alternatives to the car.

There are encouraging signs that the UK is emerging from years of economic gloom with green shoots of growth in the economy and record levels for British car production. However, drivers are still suffering the effects of the punishing cost of motoring and a dilapidated roads infrastructure.

The terrible weather conditions that we encountered across the winter with floods, high winds and storms, have taken their toll on our roads and have made driving quite hazardous in some areas. Drivers are facing new threats on the road. Every day I see other drivers using hand-held phones and even texting at the wheel. When will people realise that, whatever it is, it can always wait?

And, regrettably criminals are increasingly targeting unsuspecting motorists with insurance scams like 'crash' and 'flash for cash'.

So more UK motorists are deciding to protect themselves by installing dashboard camera technology – a common feature in countries like Russia, but now catching on quickly in the UK.

In this proud motoring nation I have one of the best jobs – I actually get paid to watch and commentate on the greatest sport ever! It is such an exciting time for Formula One with some of the greatest drivers and the most exciting cars with new technology on the grid. And for me, F1 is evolving to become more relevant to road cars.

The new hybrid power units are saving a third of the fuel used by last year's cars, and are only a few seconds slower per lap. This is simply amazing and points the way ahead for the next generation of family cars.

It is, therefore, with great pleasure that I introduce you to the 26th edition of the RAC's Report on Motoring which reflects today's concerns and views of UK drivers.

Suzi Perry

Executive summary

Great Britain is a motoring nation. A country of nearly 36 million drivers, who rely on their cars day in, day out, as they go about their everyday routines. Despite fuel prices, pot holes, taxes and bottlenecks, we refuse to turn our backs on the car, and it continues to play a crucial role in all our lives.

This year's RAC Report on Motoring explores British motorists' relationship with their car and with motoring in general. It examines motorists' behaviours, attitudes and beliefs to paint the most detailed and accurate picture yet of what makes drivers in 'Motoring Britain' today tick.

Based on research from a sample of 1,526 British drivers and with expert commentary from a distinguished panel of leading motoring industry experts¹, this report is essential reading for motorists, transport authorities, industry bodies, politicians and policymakers alike.

Some of the key findings in this year's report include:

Cost of fuel is still a top concern for motorists

With the last recession fresh in motorists' minds, many are still worried about the **high cost of petrol and diesel**. The freeze on fuel duty and falling world oil prices have helped to stabilise how much motorists pay at the pumps and have restored confidence to an extent; but some 47% of motorists still rank the cost of fuel as their biggest motoring concern. While even more motorists ranked the cost of fuel as their top concern last year, it is clear drivers are still feeling vulnerable and are only too aware that fuel prices could rise again.

Drivers have had enough of pot holed roads

Motorists are getting **more and more concerned about the state of Britain's roads and the sheer number of potholes**, particularly on the local roads they use every day. The pothole epidemic is a major worry for 41% of motorists this year, compared to just over a third (36%) this time last year. Two thirds of drivers (66%) believe that local roads have been neglected by the authorities and have deteriorated over the last 12 months as a result. And, older drivers are most likely to notice the worsening condition of their local roads, with over three quarters (77%) rating it as a top concern. Such is the strength of feeling about the state of the UK's roads, that a third of motorists (36%) would willingly pay more motoring tax if the additional funds generated were ring-fenced to go back into improving local roads.

Motorists need to brush up on the Highway Code

This year's report shows that motorists are failing to maintain their knowledge of current motoring laws and driving best practice over the years after passing the driving test. When asked about the recommended stopping distances at 70mph on motorways and at 30mph on local roads, only a small minority knew the correct distance and, worryingly, the majority seriously underestimated the correct stopping distances. There is also a lack of understanding of the law on new driving offences such as tailgating and hogging the middle lane, and a majority of motorists don't understand the law regarding using mobile phones while driving. The vast majority of motorists think it is perfectly legal to send texts while their car is stationary with the engine running, with only 39% of drivers recognising that it is illegal to do so.



1. Further information about the research can be found in the Appendix on page 85

Executive summary

Drivers tend to speed on motorways

Motorists are more likely to speed on motorways than on any other roads. Two thirds (67%) of drivers admit they speed on the motorway, a 2% increase on last year and a 4% rise compared to 2012. While 35% claim to reach speeds of 80mph on Britain's motorways and a small minority (4%) say they drive at 90mph or more, motorists estimate that their average speed on UK motorways is 72.5mph. Exceeding the speed limit on motorways is seen as acceptable by a greater proportion of motorists than speeding on other types of roads. Four in 10 (41%) feel that it is perfectly acceptable to travel at up to 80mph in a 70mph limit, however, just 12% of motorists think it is appropriate to drive at 40mph on roads where the speed limit is 30mph. A majority of motorists (70%) would like to see the speed limit on motorways increased which is consistent with similar views expressed by motorists going back as far as 2009. More than half (58%) of motorists think the speed limit for motorways should be 80mph or above.

Drivers are concerned that mobile phones are a deadly distraction

The **distraction caused by mobile phones remains a major concern for motorists.** Over a third (34%) worry about other drivers being distracted by their mobile phones while behind the wheel. And, it is the older generation who are most concerned about this. Forty nine per cent of motorists aged 65 or over voiced concerns – a 9% increase compared to 12 months ago. Some three quarters (75%) of motorists report regularly observing other people chatting on their mobile phones while driving and 44% claim they see this happen during most of their car journeys. However, just 8% of motorists admit to doing it themselves, suggesting perhaps that they are being economical with the truth or simply do not consider themselves as lawbreakers when it comes to using their mobiles when they are on the move.

Child road safety remains a concern despite falling casualty rates

While the vast majority of motorists (69%) feel children are as safe on the roads, if not safer, than when they were young, **child road safety is still a key concern. Drivers are worried about youngsters being distracted by modern technologies with 31% of motorists concerned about the impact of smartphones, making children dangerously oblivious to their surroundings.** Motorists aged over 45 years (39%) are particularly worried about this issue.

Motorists feel uncomfortable driving in adverse conditions

When it comes to **driving in demanding weather conditions such as heavy rain, snow or ice, many British motorists feel distinctly uncomfortable** with many actually avoiding driving altogether in these situations. Eight in 10 (79%) motorists admit to feeling uncomfortable driving on icy roads and 95% of those try to avoid driving when it's icy. Seventy two per cent of drivers are uncomfortable driving when it is snowing with the majority of them (96%) avoiding driving in these conditions whenever they can. This leaves just 4% of motorists who are uncomfortable driving in snowy conditions who say they will still drive as normal despite the snow. Young drivers are significantly more likely to feel uncomfortable (85%) in snowy conditions than older, more experienced drivers (75%).



1.0 Meet the 'multi-modal motorist'

For a number of years, Britain's motorists have told us how difficult it would be for them to adjust to life without their cars. >

 **81%**

Eight in 10 of us admit we would struggle if we had to live a completely car-free lifestyle

1.0 Meet the 'multi-modal motorist'

Despite this, most motorists walk, cycle and use trains and buses. But how much they use these alternatives is heavily influenced by where they live, their lifestyle and their perceptions of public transport.

1.1 Barriers to a multi-modal lifestyle

This year's Report on Motoring reveals a detailed picture of 2014 Motoring Britain, a place where the car still dominates and is central to motorists' lives. A place where eight in 10 (81%) of us still put our hands up and admit we would struggle if we had to live a completely car-free lifestyle. And yet, 58% of us would drive less if public transport was better. But there are significant barriers to overcome if motorists are going to make significantly greater use of buses and trains.

Those making little use of public transport believe fares are too high (54%), bus stops and train stations are not close enough to where they live (47%), services don't run often enough (44%) and don't operate on time (37%). Clearly, our public transport still suffers somewhat from an image problem.

Despite these reservations about public transport, in reality most motorists are 'multi-modal' and regularly use alternatives to the car when it suits them. In this year's Report on Motoring, we set out to understand this better and really get to grips with what it's like to be a multi-modal motorist in Britain today.



"People want more travel choices when it comes to how they get to school, work, shopping and days out, but feel their travel...

... needs are not being met by public transport. Stuck between a rock and a hard place, they feel they have little option but to grab their keys and get behind the wheel. Cheaper fares, smartcards and much better services and information will be needed to make people feel they have a real choice."

Stephen Joseph
Chief Executive
Campaign for Better Transport



More than a third of people using public transport believe services don't operate on time

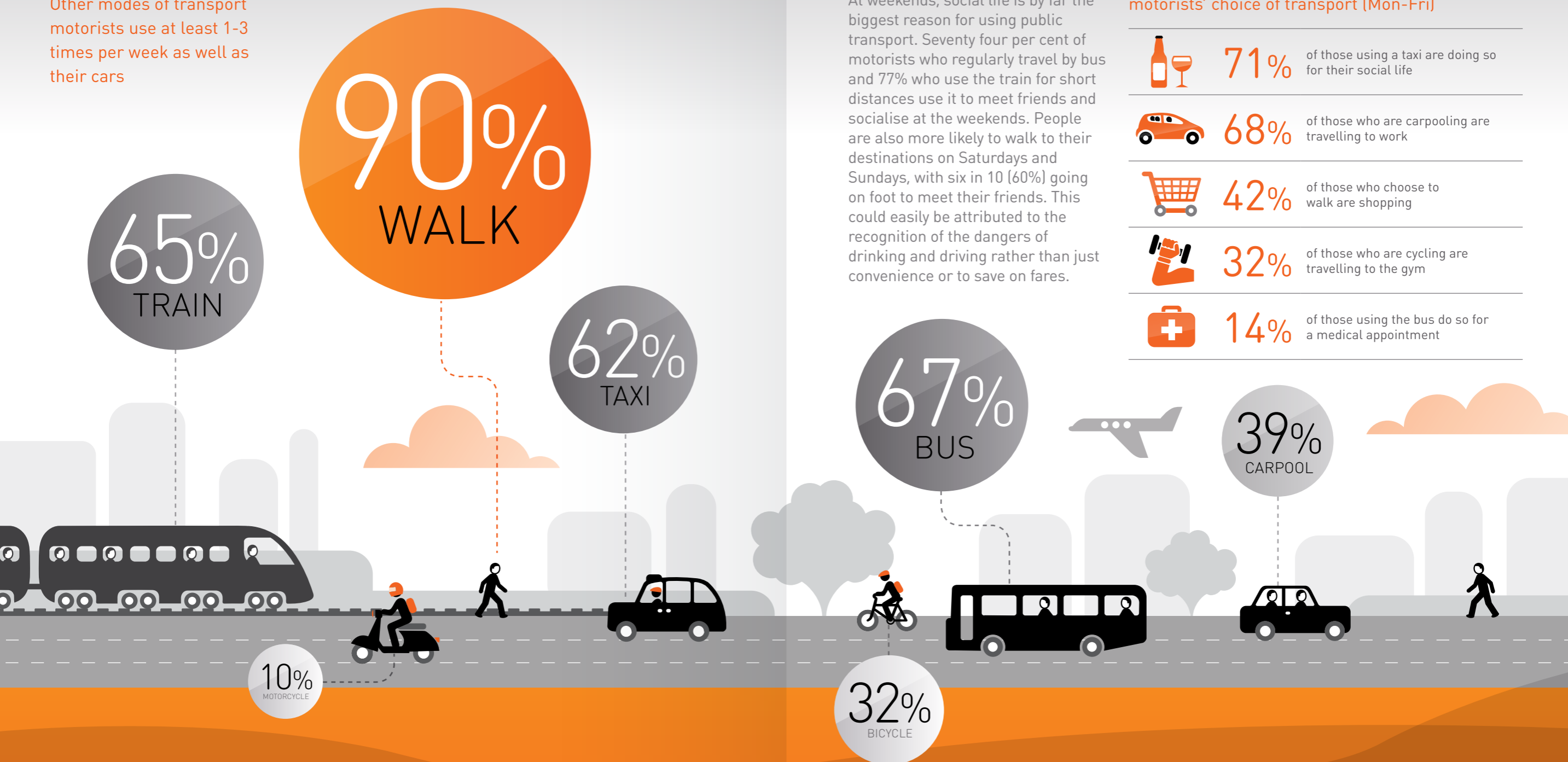


Over half of those making little use of public transport believe fares are too high

1.0 Meet the 'multi-modal motorist'

1.2 The facts

Other modes of transport motorists use at least 1-3 times per week as well as their cars



1.0 Meet the 'multi-modal motorist'

1.3 The 'multi-modal' society

In our research, the 'multi-modal motorist' uses an alternative mode of transport to the car (excluding walking) at least one to three times a week.

They are more likely to live in an urban environment. Thirty per cent dwelling in a city or a town centre are multi-modal compared to 21% of motorists living in other areas who rely mainly on their cars. Not surprisingly, of those motorists living in rural areas, over a quarter (27%) use their car mainly to get around (excluding walking).



of motorists claim they also travel by bus, but only 15% do so on a regular basis

Two thirds (67%) of motorists claim they also travel by bus, but only 15% do so on a regular basis. Seven in 10 (71%) motorists aged 25-64 never use the bus and travel using other modes of transport only very occasionally.



"Time is a very scarce resource for many. How long it takes to get to work, education or other activities by different modes of travel is a key factor in the decision-making process. While many people will use a multitude of transport modes, if it's quicker and more convenient to take the car, most motorists will take that option."

Mike Hawes

Chief Executive
Society of Motor Manufacturers and Traders

1.4 Age matters

17 to 24-year-olds are far more likely to be multi-modal than their older counterparts. Seventeen per cent of younger drivers get the bus one to three times per week, compared to just 8% of 25 to 44-year-olds and 7% of 45 to 64-year-olds.

However, bus usage does increase in later years, 17% of motorists aged 65 and over catch the bus up to three times a week, clearly taking full advantage of the free bus pass scheme for pensioners.

1.0 Meet the 'multi-modal motorist'

1.5 Drive or the driveway?

Overall, there is little evidence of a significant shift in car usage. Twenty three per cent of motorists claim they are now using their cars more than this time last year, up 4%, no doubt driven by the improving economic situation and the cost of fuel which has remained steady.



London – the 'multi-modal' city

Motorists living in the capital are well and truly multi-modal. With public transport options much more readily available and accessible, car travel is significantly lower among Londoners and they are far more likely to travel by bus (28%) and tube (32%) on a regular basis.

Understandably, London is the least car-dependent city in the UK².

The average distance travelled on a bicycle by London residents has increased by 63% since 1995/97, nearly three times the national percentage increase³. London's public bicycle sharing scheme, affectionately known as 'Boris' Bikes', may be a significant factor. With more than 8,000 bikes and over 550 bicycle docking stations across the city, more than 22 million journeys have been made on the bikes since the scheme's launch in 2010⁴.

Reasons for motorists deciding to use their cars less than a year ago are illustrated here:



2. Car Dependency Scorecard 2012, The top UK cities for sustainable transport, Campaign for Better Transport

3. Department for Transport, National Travel Survey: 2012, Statistical Release, published: 30 July 2013

4. visitlondon.com/traveller-information/getting-around-london/london-cycle-hire-scheme

1.0 Meet the 'multi-modal motorist'

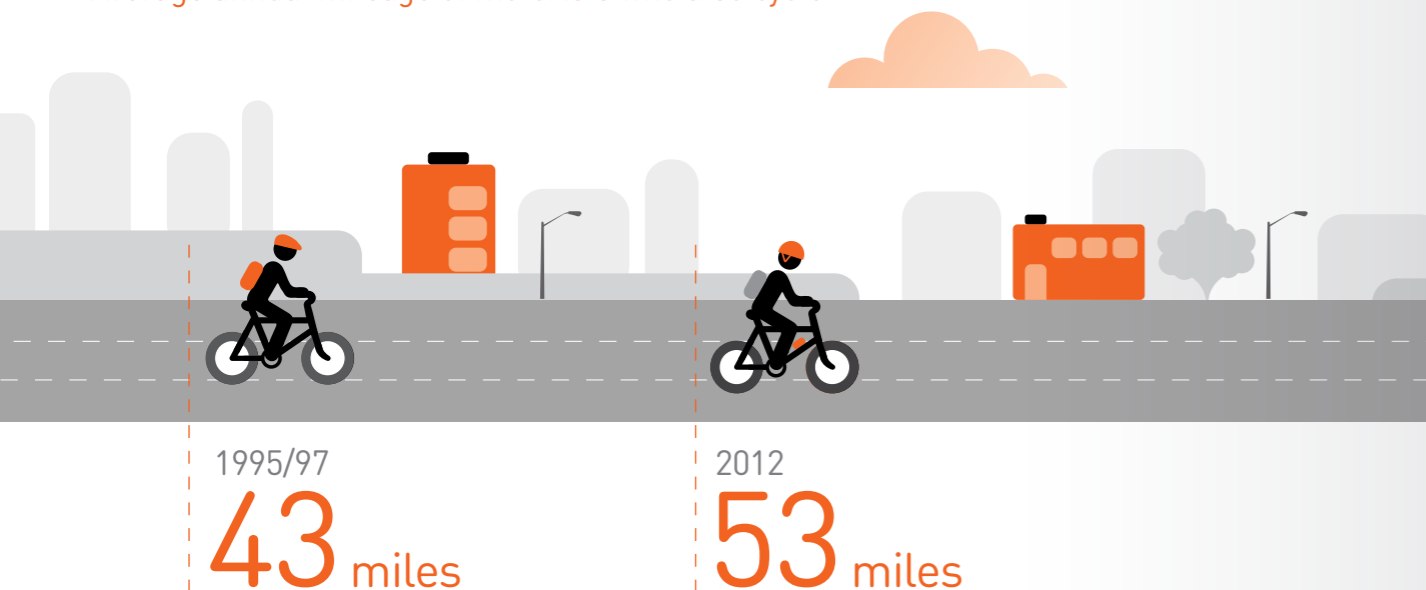
1.6 Pedal power

Just 7% of motorists regularly cycle. According to the Department for Transport (DfT) the bicycle is still a relatively uncommon mode of transport. In 2012, only 2% of all trips were made by bicycle and there was a small drop in the number of bicycle trips per person per year from 18 trips in 1995/97 to 16 trips in 2012⁵.

However, in terms of distance travelled, the average number of bicycle miles has increased by 23% from 43 miles in 1995/97 to 53 miles in 2012 – the highest level recorded over this time period.

There are some signs that attitudes to cycling are starting to change. Initiatives such as the Local Sustainable Transport Fund have led to more investment in cycling infrastructure and schemes.

Average annual mileage of motorists who also cycle



“We need to make our cities fit for cycling. Simply painting strips of road green or blue is not enough. The country needs sustained investment...

... over decades to build segregated cycle lanes and bring our deficient infrastructure up to par with our European counterparts. The Government, from the Prime Minister down, talks a good game but the slow-drip of funding is failing all those who would like to get on their bikes but are too scared. Motorists, pedestrians and, most of all, the families of those who are being needlessly killed and injured on our roads are being let down.”

Philip Pank
Transport Correspondent, The Times

5. Department for Transport, National Travel Survey: 2012, Statistical Release, published: 30 July 2013

2.0 What's on motorists' minds today?

Over the last 12 months, the UK has started to emerge from a prolonged period of economic stagnation during which many people have seen their standard of living fall. However, the issues on the minds of the majority of motorists have not changed materially since last year. >

Of those who thought the roads had deteriorated...

 99%

identified deteriorating road surfaces and potholes on local roads as the biggest issue

2.0 What's on motorists' minds today?

They are still primarily concerned about the cost of motoring, the state of our roads and the number of potholes, parking issues and the behaviour of other drivers. And, there is little evidence to suggest that actions by the Government will be sufficient to address these concerns in the short-term.

2.1 Fuel for thought

The cost of fuel is a perennial issue for Britain's motorists. With the last recession still fresh in motorists' minds and the UK economy not quite out of the woods yet, money worries still remain top of the list of drivers' concerns. However, in 2014 the cost of fuel is not quite the concern that it was 12 months ago.

Less than half (47%) of motorists rank it as their biggest worry, compared to 63% this time last year, a fall of 16%. Clearly, the freeze on fuel duty, lower global oil prices and that strength of the pound have contributed to this.

This easing of concern is evident in groups who were expressing greatest concern about fuel prices 12 months ago. The age group most affected by the price of fuel is 25 to 44-year-olds with over half (56%) ranking it as number one on their list of motoring concerns. However, this percentage has declined sharply since last year, when nearly seven in 10 (68%)⁶ ranked the cost of fuel as their number one concern.

Go to rac.co.uk/fuel to keep up to date on the price at the pump

Similarly, last year over two thirds (67%) of motorists living in rural areas were particularly worried about the cost of fuel⁷ but in 2014 this figure dropped to 50%.

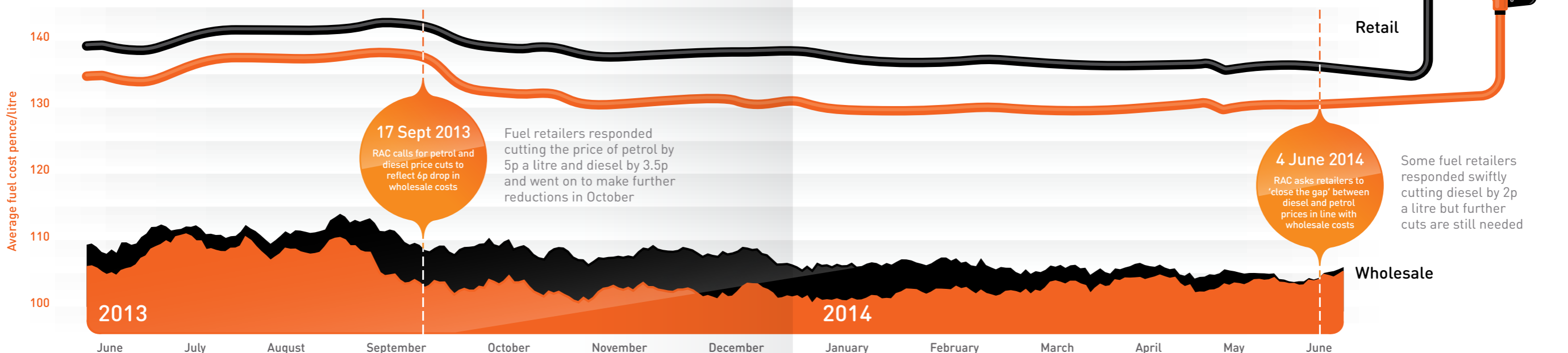
Over the past year, motorists have reaped the benefits of competitive price-cutting among the major supermarkets. This has encouraged other retailers to cut prices in areas where they are competing against supermarkets. Petrol prices on retail forecourts have dipped as low as 125.7p per litre with shoppers at some supermarkets receiving discounts on fuel linked to their in-store spending⁸. Fuel forecourt prices were at a three-year low, averaging 129.46p in March 2014,

compared to the 138.42p average one year ago. And, diesel prices were at their lowest since July 2012, averaging 136.59p per litre in March 2014, compared to last year when they cost on average 145.24p a litre⁹.

However, motorists are only too aware that fuel prices can go up as well as down. If there is one thing motorists have learned since the downturn in 2009, it is how things can dramatically change with the swings and roundabouts of the global economy and world events.

- 6. RAC Report on Motoring 2013
- 7. RAC Report on Motoring 2013
- 8. thisismoney.co.uk/money/cars/article-2564643/Petrol-prices-fall-three-year-low-according-AA.html
- 9. Fuel price data supplied by Experian Catalist, www.catalist.com
- 10. petrolprices.com/the-price-of-fuel.html

RAC calls for action - average pump prices vs wholesale costs¹⁰



2.0 What's on motorists' minds today?

2.2 Fuel duty: a taxing issue

The level of fuel duty British motorists pay has long been contentious, primarily because they are hit by a 'double whammy' every time they fill up. They pay around 58p fuel duty on every litre and then pay VAT on the cost of the fuel and the fuel duty.

With the Exchequer still taking more than 60% in tax revenue on every litre and the UK paying over the odds with one of the highest levels in the EU, the nett effect is an adverse impact on the cost of living, inward investment, businesses and employment¹¹.

However, there are signs the Government is waking up to the detrimental effects of fuel duty on the economy and may be making a taxation U-turn. In a recent report¹², the Treasury admitted there is a direct link between the cost of fuel and economic growth. It revealed that by abolishing the planned fuel duty escalator rise in 2011, cutting duty by 1p per litre and freezing this rate that GDP will increase between 0.3% and 0.5%.

Here's how the price motorists are paying at the pumps breaks down in 2014:



"Cutting fuel duty in the 2014 Budget would have helped millions of struggling families and businesses and also...

... boosted the fragile economic recovery. This was a baffling lost opportunity given the Treasury has finally admitted what FairFuelUK and the RAC has been telling them for years – that low fuel duty actually stimulates the wider economy. Reducing the tax on beer and bingo was patronising electioneering and a clear sign that when it comes to cars, vans, trucks and our essential road economy, this Government is woefully out of touch."

Quentin Willson
Motoring Journalist and FairFuelUK Campaigner

11. Research undertaken for Fair Fuel UK by the Centre for Economic and Business Research and The National Institute for Economic and Social Research.
12. gov.uk/government/uploads/system/uploads/attachment_data/file/303233/Analysis_of_the_dynamic_effects_of_fuel_duty_reductions.pdf

Go to rac.co.uk/advice/fuel-prices-explained for further information on UK fuel prices

2.0 What's on motorists' minds today?

Fuel duty revenue contributed more than £33bn to the Treasury in 2012 (includes VAT charged on fuel duty)¹³ and this year is estimated to reach a similar sum.

However, the Treasury faces a dilemma. Environmental policy is targeted at reducing carbon dioxide emissions from transport, however, the carbon dioxide emissions from new vehicles has fallen steadily as motor manufacturers find innovative ways of improving fuel economy.

As a consequence, treasury revenues from diesel and petrol sales will fall over time as more fuel-efficient vehicles become the norm. In recognition of this, the RAC called for a radical review of motoring taxation in last year's Report on Motoring. It is clear that this was a step too far for a government approaching a general election. However, it remains an important issue for the next parliament to address.

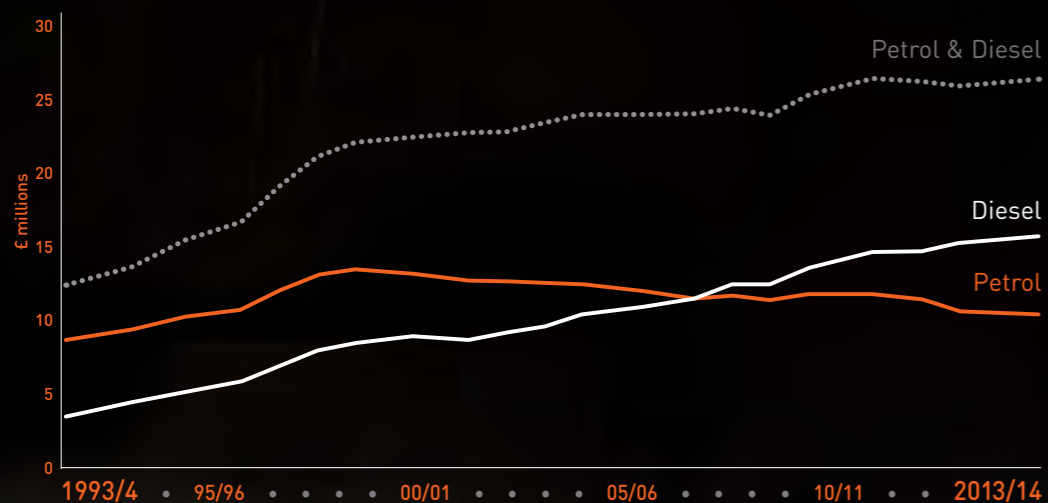


2.3 Caution ahead

While the green shoots of economic recovery are evident, caution is still required. The average household income remains below pre-recession

levels and can only be expected to recover gradually over the next few years. It may be some years before many low and middle earners feel the recession is really over¹⁵.

Total fuel duty contributions over the past decade¹⁴



13. Including the VAT charged on the fuel duty (see HM Treasury, 2012)
 14. [www.uktradeinfo.com/Statistics/StatisticalBulletins/Pages/BulletinArchive.aspx?viewname=Hydrocarbon Oils Duties Archive](http://www.uktradeinfo.com/Statistics/StatisticalBulletins/Pages/BulletinArchive.aspx?viewname=Hydrocarbon%20Oils%20Duties%20Archive)
 15. pwc.co.uk/the-economy/publications/uk-economic-outlook/

2.0 What's on motorists' minds today?

2.4 State of the roads

The condition of the roads is a huge concern for motorists today, second only to the cost of fuel. Specifically, it is a major concern for four in 10 (41%) motorists in 2014, compared to just over a third (36%) of motorists last year.

Concern is highest for motorists living in villages and rural locations (45%) compared to 30% living in towns or cities. Regionally it is a particular concern for motorists living in Scotland (53%) and in the South East (47%).

While only 27% believe road conditions on motorways have deteriorated over the last year, a massive 66% believe that their local roads have been neglected and have worsened in condition. And when asked what has deteriorated, 99% of those respondents identified road surfaces and potholes on local roads as the biggest issue.



of motorists state the condition of UK roads is a major concern



believe that their local roads have been neglected and have deteriorated in condition

Not surprisingly, the picture is not uniform across the UK. Local authorities have to decide what priority they give to road maintenance and they will take account of what they see as the local priorities and affordability. Nevertheless, motorists' concerns regarding the state of local roads resonate across the UK. Over eight in 10 (84%) motorists living in the South West believe the state of their local roads has declined in the last 12 months, compared to 75% of drivers in the South East.



2.0 What's on motorists' minds today?

2.5 Getting the priorities right

Not surprisingly, motorists believe that the maintenance of roads, and in particular local roads, should be a top priority for the Government's transport investment – 85% of drivers would like to see a higher proportion of transport investment spent on improving the condition of existing local roads compared to 78% last year, up 7%.

And, over two thirds (68%) of motorists feel that investment priority should be given to targeted improvements to local roads, a 5% rise compared to this time last year.

However, it is not just the local roads that motorists use day in, day out that require investment for essential repair and maintenance. Nearly two thirds (65%) of motorists feel that the

maintenance of existing motorways and other major trunk roads should be given priority. Again, this has gained importance in motorists' minds over the last 12 months, up 4% compared to last year.



Eight in 10 motorists feel that the motoring taxes they pay are not sufficiently reinvested into the maintenance of local roads



Over a third of drivers claim they would be willing to pay more motoring tax if the additional funds were ring-fenced to improve roads



“The Government seems more interested in investing in big, shiny, new transport legacy schemes such as ‘HS2’ rather than putting hard-earned tax payers’ money into making motorists’ daily lives better by improving the shocking state of local roads.”

Quentin Willson

Motoring Journalist and FairFuelUK Campaigner



“Winston Churchill once said: ‘there is no such thing as a good tax’ but it is clear from the research that motorists hate potholes more than paying their taxes! It may come as a surprise to government policymakers to hear that British drivers would willingly put their hands in their pockets and pay more tax if it meant our roads were properly repaired and maintained.”

David Leibling

Transport and Motoring Consultant

2.0 What's on motorists' minds today?

2.5 Plastering over the cracks

Britain's motorists have good reason to be concerned about the condition of our roads. The latest ALARM report¹⁶ from the Asphalt Industry Alliance (AIA) reveals a steady decline in the condition of the nation's road network, despite more than two million potholes undergoing repair in 2013.

Tarmageddon; It would take more than 10 years of work to get Britain's streets back to an acceptable condition with the cost of 'catch-up' road repairs rising by £1.5bn in the last 12 months, to £12bn. Meanwhile, in the last 12 months, the number of compensation claims for personal injuries or vehicle damage caused by potholes has increased to an average of 540 per council in England (excluding London), a rise of 20%. These repairable hazards are a danger to all road users, with cyclists and motorbike riders particularly vulnerable¹⁷.

However, there are signs that road maintenance and repair are now starting to move up the political agenda. An additional fund of £200m has been announced to improve poor road conditions across the UK, of which £168m has been allocated as a 'pothole fund' for local authorities in England.

However, while this is welcome in the run-up to a general election, it represents a very small proportion of the £12bn in England alone that AIA believes is required to return our road network to a state that is fit-for-purpose.

Government road maintenance funding



16 & 17. Annual Local Authority Road Maintenance (ALARM) Survey 2014



"Britain's pothole-riddled roads are a national disgrace. Millions are paying the price for many years of underinvestment,...

... risking damage to vehicles and threatening road users' safety. The Government should be embarrassed that our roads are in a worse state of repair than ever before. Motorists don't want to hear a long list of excuses for our crumbling roads, they want to see action. More money needs to be ring-fenced by central government to establish a sustained, long-term roads repair programme which not only clears the unacceptable maintenance backlog, especially on the local roads, but provides investment upfront to ensure Britain's shameful pothole pandemic never happens again. Ministers should focus on sorting out local road potholes rather than developing grandiose motorway plans."

Stephen Joseph
Chief Executive
Campaign for Better Transport


Go to
rac.co.uk/advice/potholes
for advice on potholes and to report a pothole


2.0 What's on motorists' minds today?


2.7 Parking pressures

Motorists are well and truly caught in the crossfire when it comes to parking – trapped between ever-increasing parking charges as some local authorities seek to raise extra revenues from parking to fill gaps in other areas of their budgets. Others reduce parking spaces to discourage the use of cars in town and city centres or, at best, have failed to provide extra parking to accommodate increased car usage over many years.


Parking is a growing concern for motorists:

 **22%** of motorists have observed parking that was previously free of charge having charges imposed in their local area, rising to 24% of motorists living in the suburbs or on the edge of towns

 **80%** of motorists say they have noticed parking has become more expensive in the high street or town centre

 **67%** of those who have noticed it's become more expensive, have cut down on the amount of driving they do in high streets and town centres as a result

 **59%** of London motorists in particular, have felt the effects of increased parking costs and are finding high street parking is hitting their pocket more

 **67%** of motorists who have noted it is more expensive believe there are now fewer parking spaces available near the high street or town centre and this has impacted on the amount of driving they now do, with 65% of them using the car less



“The British high street is suffering and the squeeze on parking spaces is making it even tougher for many to get there. We need to find creative solutions that encourage motorists to use the high street or else the out-of-town shopping centre with its free parking will continue to thrive at the expense of the high street.”

Mike Hawes
Chief Executive
Society of Motor Manufacturers and Traders

2.0 What's on motorists' minds today?

One in ten motorists (10%) claim they are driving less these days due to the difficulty in finding parking spaces and even if they can find somewhere to park, two thirds of motorists (65%) believe parking spaces are too small for today's cars.

Three quarters of motorists (74%) believe that more cars on the road is the primary reason for parking becoming increasingly hard to find, rising to eight in 10 (80%) motorists aged over 65. And, more than two thirds (67%) of motorists feel parking restrictions are becoming more stringent.

Limitations to on-street parking vary from area to area as well as changing through the week. Motorists' views on parking will differ depending on where they live and work and their perceived levels of difficulty in parking.



80%

of motorists over the age of 65 believe it's becoming increasingly difficult to find car parking spaces due to more cars on the road



"Parking is up there on the list of motoring bugbears with the price of fuel and potholes. From over-zealous traffic wardens...

... to misuse of disabled and family parking spaces and excessive penalties for a minor misdemeanor, it's a prickly issue guaranteed to needle even the most mild-mannered motorists. Drivers understand the need for parking restrictions to improve traffic flow and reduce dangerous or obstructive parking, but they also want more parking provision to cope with the extra cars on the roads. They also object to local authorities raising parking charges as a means of increasing their revenues."

David Leibling
Transport and Motoring Consultant

Residents-only parking scheme

Bristol City Council has embarked on a controversial plan to implement a blanket roll-out of resident-only parking zones to halt commuter parking in its city streets. Under the scheme,

residents will have to pay £48 to park outside their houses for one car and £96 for a second permit. The scheme has faced fierce criticism, from residents, local businesses and commuters alike.

"Anyone trying to get around Bristol will know it is incredibly frustrating. It is a tax without any thought to how everyone will get around. They are just beating drivers with a stick, saying 'it is your fault'.

Bristol-based Ben Collins, stunt driver, former 'Stig' on TV's Top Gear and former participant in the RAC Future Car Challenge¹⁸

"Parents need to be able to drop off their children – plus there's Ramadan, Friday prayers, funerals and functions. This is impossible for us – a mosque without parking facilities."

Wazir Ali, Bristol Jamia Mosque, Totterdon, Bristol¹⁹

18. bbc.co.uk/news/uk-england-bristol-26415658

19. bbc.co.uk/news/uk-england-bristol-23469717

2.0 What's on motorists' minds today?

2.8 Pay and display

Parking charges have always been an emotive issue for motorists. Many are unsure about how local authorities use the monies raised from parking fines and fees. Four in 10 (41%) motorists believe the local authority where they live uses the revenue from parking charges to subsidise other areas of non-motoring expenditure. And, there is plenty of evidence to support their views.

Figures analysed by the RAC Foundation²⁰ show the vast majority of local authorities in England generate a surplus from their parking activities:

P 2011/2012
£565 million

The English councils' total current account surplus from on-and-off street parking operations in 2011/12

2012/2013
£594 million

The English councils' total current account surplus from on-and-off street parking operations in 2012/13. This is £54m more than the previous year

 **£39.7** million

Westminster Council in London was the authority with the biggest income surplus in 2012/13



"The bottom line is that hundreds of millions of pounds are being contributed annually to council coffers through parking charges...

... and the drivers who are paying them have a reasonable expectation to see the cash spent on improving the roads. Sadly, this does not always happen – as was the case last year when a judge declared Barnet Council had acted illegally trying to set charges to raise general revenue, rather than as part of its traffic management plan."

Professor Stephen Glaister
 Director
 RAC Foundation

20. racfoundation.org/media-centre/councils-make-record-profit-parking-2012

3.0 Driving lifelong learning

The Highway Code has been essential reading for anyone who wants a driving licence, even before the introduction of the theory test back in 1996. >



16%

of motorists remember stopping distances quoted in the Highway Code

3.0 Driving lifelong learning

How much do motorists remember once they've consigned their L-plates to the bin and to what extent do motorists keep up with any subsequent changes to motoring laws once they have passed their test?

3.1 Knowing when to stop

Most of us recall trying to memorise the stopping distances for different speeds and driving conditions for our driving test, but just how much of it do we recall once the test is a distant memory?

Worryingly, we found that the vast majority of motorists underestimate the distance for their car to come to a complete stop when braking in an emergency.

When asked about driving on motorways at 70mph, just 16% of motorists remembered the stopping distance quoted by the Highway Code for a car travelling at 70mph is 24 car lengths. Around half of respondents thought the stopping distance was 10 car lengths or less.

Similarly, around 50% of motorists thought the stopping distance at 30mph was two car lengths or less, which is a third of the six car lengths quoted in the Highway Code. It is not surprising, therefore, that we see so many 'rear-end shunts' if motorists have such a poor understanding of how much distance to leave between themselves and the car in front.

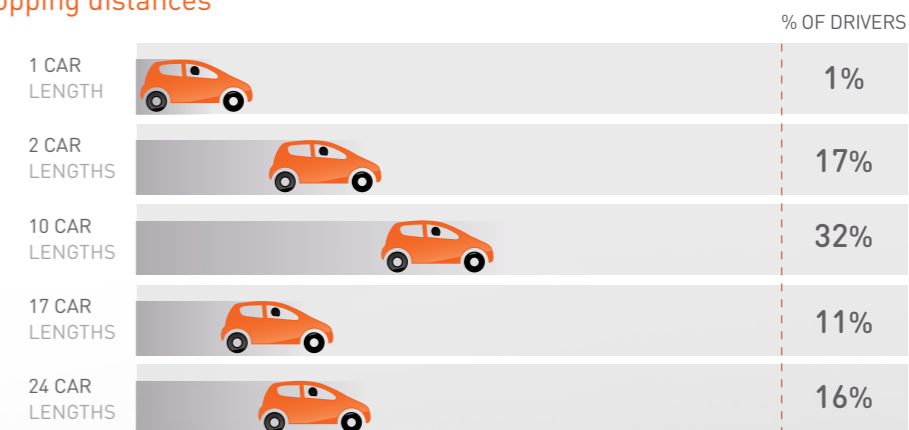
Stopping distance is the total distance motorists travel before they hit the brakes, plus the distance they travel while the brakes slow the car to a stop.

drivingtestsuccess.com/tests/stopping-distances/

Drivers perceptions of stopping distances



Highway Code stopping distance at 70mph:
24 car lengths



“Information from the Highway Code, including stopping distances, should be for life and not just for the theory test. Drivers need to make judgment calls every day but this can be seriously impaired if they don't understand how long it will take for their car to stop safely while travelling at speed or in challenging road conditions.”

Simon Best

Chief Executive, Institute of Advanced Motorists

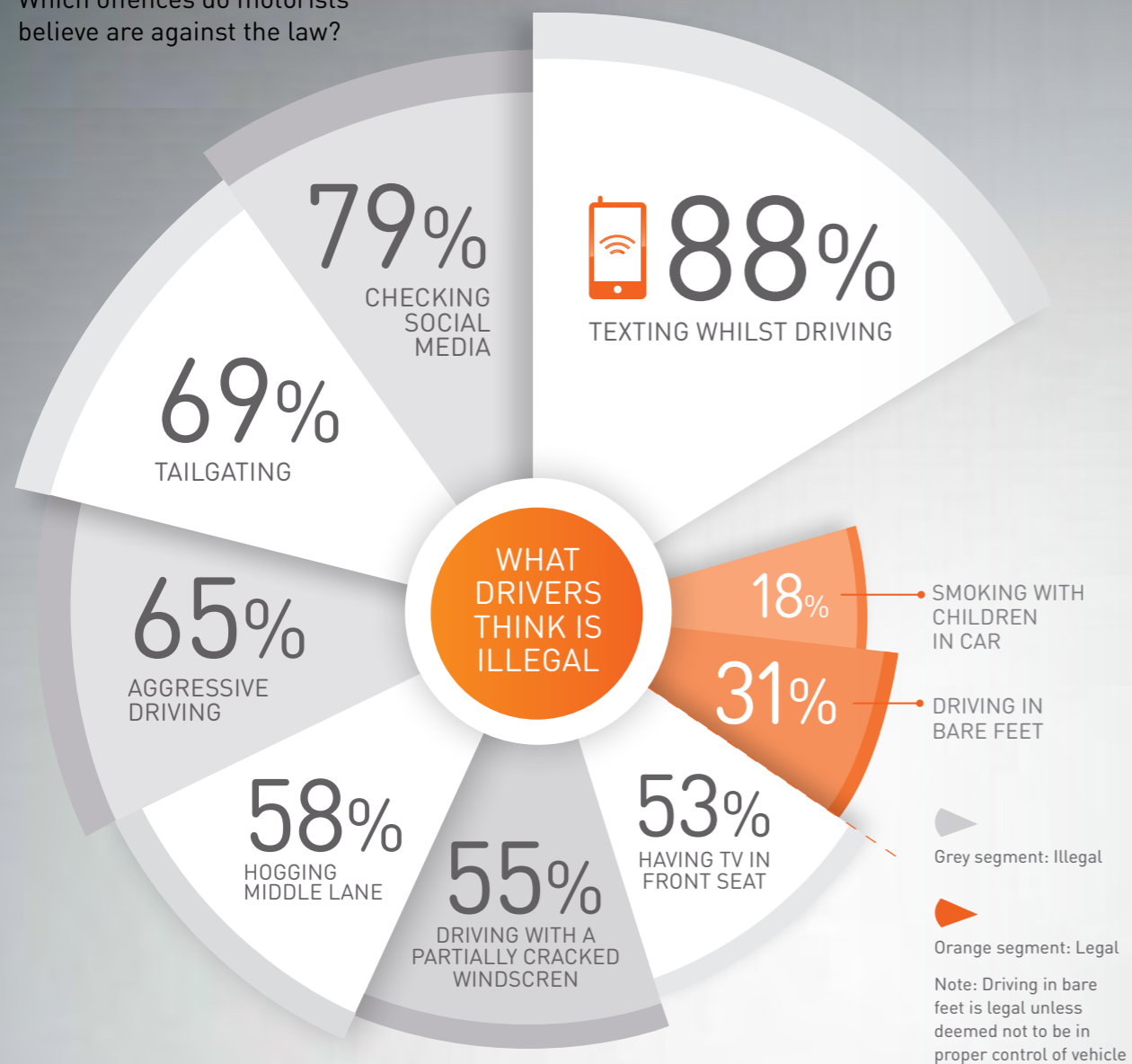


3.0 Driving lifelong learning

3.2 Legal or illegal?

We set out to establish whether today's motorists actually know what's legal and what isn't?

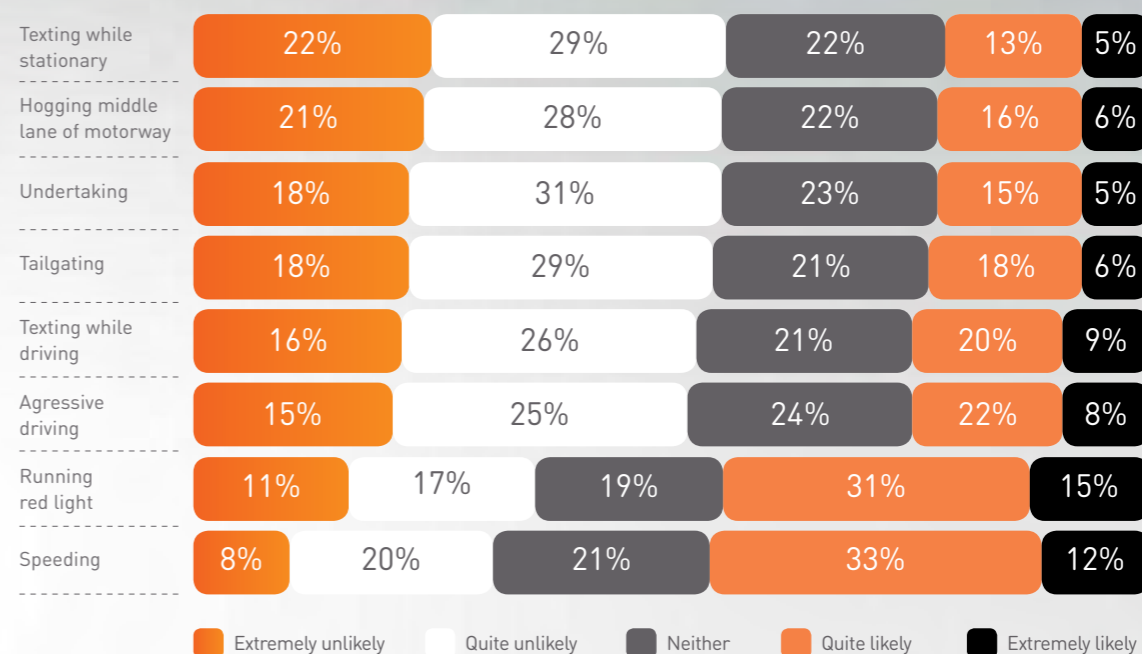
Which offences do motorists' believe are against the law?



3.3 Getting away with it?

So, what do motorists expect to get caught for? On the whole, the majority of motorists expect to get away with most motoring offences. It is hardly surprising, therefore, that they would like to see a greater police presence on our roads to enforce motoring legislation more effectively on other motorists, which in turn would act as a genuine deterrent.

How likely do motorists' think they'd be caught for offences?



3.0 Driving lifelong learning

3.4 Caught in the act

So what offences are motorists actually getting caught for? The facts show that motorists are spot on when it comes to what they think they will be caught for and how they actually gain points on their licences.

10% of motorists surveyed said they had points on their licence. Of these:



of motorists who acquired points were caught speeding by a speed camera



were issued points for using a mobile phone while driving



gained their points for running a red light

3.5 A safer environment

The research for this year's Report on Motoring suggests that the majority of drivers soon lose touch with road law and driving best practices once they have passed their test. Such behaviour would be regarded as unacceptable or detrimental in many professions where colleagues are encouraged or obliged to keep abreast of best practice, technology updates and even legislation with ongoing training or refresher courses. Drivers of HGVs, buses and coaches are required to undertake training in order to demonstrate their professional competence, however, we appear to regard it as acceptable for motorists, who are driving a potentially lethal weapon, to remain on the road without the requirement to undergo any further training or assessment.

Just as continuous professional development is now seen as normal in many workplaces and often a requirement for continued practice or to operate potentially dangerous equipment, it may be time to instill a similar approach to driving. This need not be onerous, costly or punitive but there is a potential benefit to all road users if drivers were required to complete a simple computer-based knowledge assessment, say every 10 years.



4.0 Blue light – keeping law and order

The behaviour of other drivers remains a major concern for motorists, behind only the cost of motoring and the state of the roads. >



4.0 Blue light – keeping law and order

In this section we look in greater depth at several areas of particular concern where driver behaviour is not only anti-social but also illegal.

4.1 Driven to distraction – mobile phones

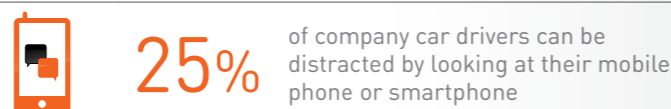
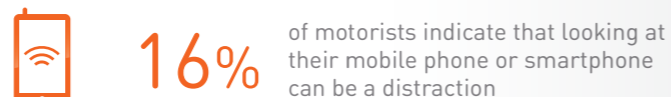
Mobile phones are now an intrinsic part of our lives. As a nation we have become addicted to them – we just can't seem to be able to put them down – even when it is dangerous and against the law.

Ofcom warns we are a nation of mobile phone addicts unable to go without checking our phones even for very short periods of time. Over a third (37%) of adults and 60% of teens admit they are 'highly addicted' to their smartphones²¹.

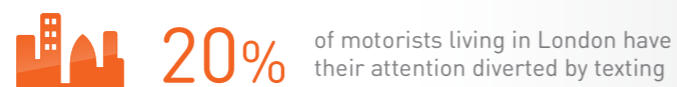
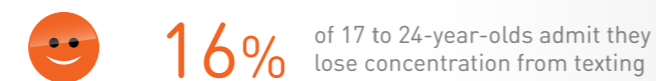
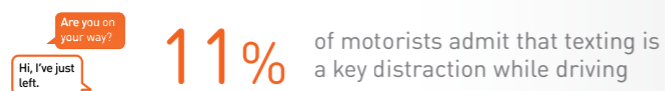
4.2 How big is the problem?

The distraction caused by mobile phones is a major concern for motorists. Over a third (34%) worry about other drivers being distracted by talking on mobile phones while at the wheel. And, it is the older generation who are most concerned about this with half (49%) of motorists aged 65 or over voicing concerns – a 9% increase compared to 12 months ago.

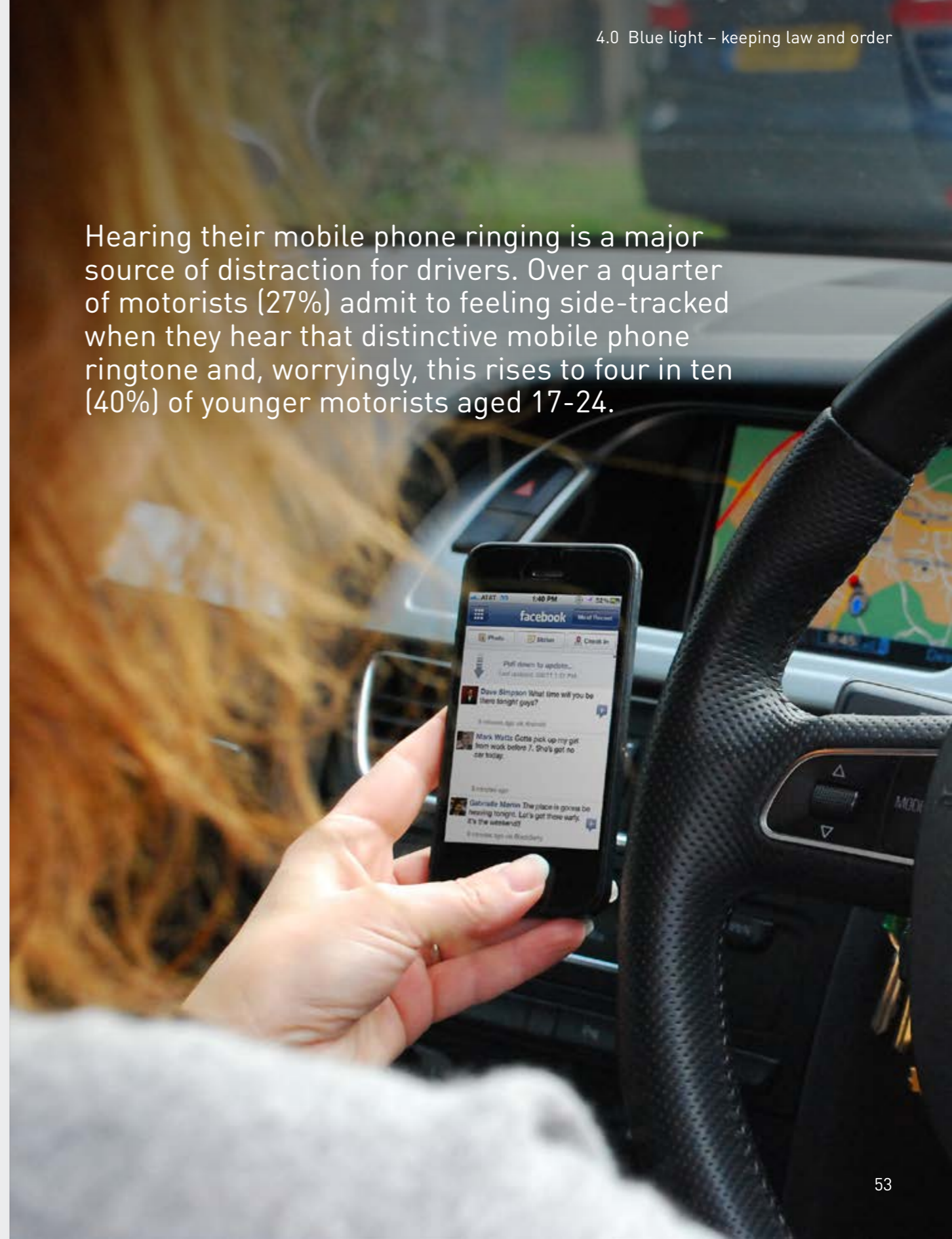
Distractions from mobile phones while driving:



Who is distracted the most by texting while driving:



Hearing their mobile phone ringing is a major source of distraction for drivers. Over a quarter of motorists (27%) admit to feeling side-tracked when they hear that distinctive mobile phone ringtone and, worryingly, this rises to four in ten (40%) of younger motorists aged 17-24.



21. consumers.ofcom.org.uk/2011/08/a-nation-addicted-to-smartphones/

4.0 Blue light – keeping law and order

There is a huge discrepancy between what motorists report they are seeing when they drive, and what they admit to doing themselves when it comes to talking on a hand-held mobile phone when driving.

Three quarters (75%) of motorists report regularly observing other people doing this and 44% see this happening during most of their car journeys.

However, just 8% of motorists admit to doing it themselves. Motorists with less than 10 years' experience are more likely to admit to talking on a hand-held mobile phone illegally (16%) compared to just 4% of those who have been driving 25 years or more.

This suggests some drivers are being economical with the truth or simply do not consider themselves as being 'one of them'!

And, when it comes to texting or checking social media or other websites while driving, the situation isn't much better:

Fifty three per cent of motorists report regularly seeing other people doing this during some of their journeys, while 29% see this during most journeys.

But only 7% of motorists admit to doing it themselves, though this figure almost doubles to 15% for 17 to 24-year-olds.



of 17-24 year olds admit to texting or checking social media on their phones while driving



4.0 Blue light – keeping law and order

4.3 Beware deadly texts and calls

Motorists are four times more likely to crash if they use a mobile phone while driving and the reaction time of drivers using a mobile phone is around 50% slower than normal driving²². Research into the impact of sending or receiving text messages among young drivers found the amount of time motorists spent with their eyes off the road increased by up to 400%. Also, young drivers made 28% more lane excursions and 140% more incorrect lane changes while texting and driving²³.

4.4 Above the law

British motorists regard themselves as law abiding and out of 35.8 million driving licence holders in the UK²⁴ just three million drivers have points on their licence²⁵. That said, more than one million drivers have been convicted of using a hand-held mobile phone while driving since 2003, when it was made explicitly illegal²⁶. This prompts the question as to whether motorists are deliberately flouting the law or whether they are just unaware of the rules?

The answer is very clear. Of those motorists who admit to having used a hand-held phone or having texted or checked out social media while driving, 90% know they are breaking the law.


And, while the majority (88%) recognise that texting while driving is illegal and 79% know that checking social media sites such as Facebook and Twitter while driving is also against the law, only 39% of motorists believe texting while their car is stationary with the engine running is illegal.

This suggests many motorists may not fully understand the law regarding in-car mobile phone usage. It is an offence for anyone to use any type of hand-held communications device when they are driving. The definition of driving includes whenever the engine is switched on, even if the vehicle is stationary. It is therefore an offence to use a hand-held mobile phone or smartphone when the vehicle is stopped at traffic lights, is stationary in a traffic jam or is parked with the engine running.

So the law is clear, and yet it seems that motorists view using a mobile phone while stationary at traffic lights or stuck in congestion as more socially acceptable and less dangerous than using their phones while on the move. They forget, for example, that when concentrating on their phone, a cyclist may pull up beside or just ahead of them and they may pull away, totally unaware of the cyclist's presence.

Worryingly, only 53% of motorists strongly disagree that it is safe to use a mobile phone while sat in traffic lights or stuck in congestion. Fourteen per cent think it is safe to text and look at social media sites when stationary with the engine running, while a further 14% don't have an opinion.

There seems to be a perception among many motorists – rightly or wrongly – that they won't get caught if they use their mobile phones while driving. More than half (51%) believe it is unlikely that they will be caught sending texts while their car is stationary. And, four in 10 (42%) motorists also think it is unlikely they will be caught texting while driving, with 16% believing it is 'extremely unlikely' they will get caught.



Are you on your way?
Hi, I've just left.

16%

believe it is extremely unlikely they will get caught for texting while driving

22. think.direct.gov.uk/mobile-phones.html

23. The effects of text messaging on young novice driver performance, Monash University Accident Research Centre, 2006

24. Department for Transport, National Transport Survey 2012, published July 2013

25. FOIR3891 03.04.14

26. transport-network.co.uk/Drivers-face-mobile-phone-clampdown/8786

4.0 Blue light – keeping law and order

4.5 Other deadly distractions

Distraction from mobile phones, particularly smartphones, is a relatively recent problem and therefore receives particular focus. However, most motorists do not believe that new technology is the main source of distraction. They still believe that distractions present since the invention of the car are most likely to lead to a loss of concentration. The most common concerns ranked by the percentage of motorists that included them in their 'top 3' distractions were as follows:

Tiredness (46%)

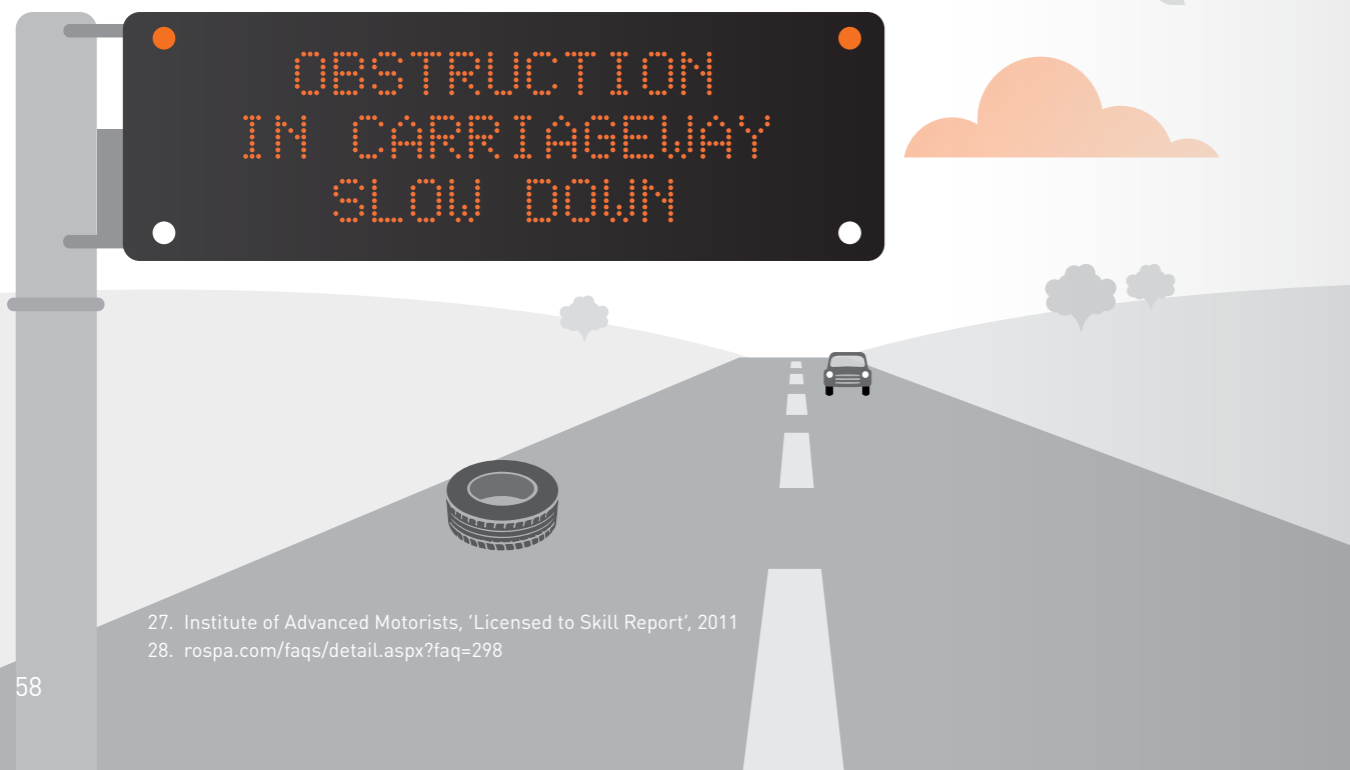
Passengers in the car talking (35%)

Daydreaming (32%)

4.6 Full speed ahead?

Speed remains the number one contributory factor in road traffic accidents today. But exceeding the speed limit is only part of the picture, accounting for just 13.9% of fatal accidents. A bigger share of fatalities (15.9%) is attributable to driving too fast for the conditions, even though within the speed limit²⁷.

Around 400 people a year are killed in collisions in which one of the vehicles involved was exceeding the speed limit or driving too fast for the conditions²⁸. While drivers accept that the speed of a vehicle should be appropriate to the road and weather conditions, just what is the reality on UK roads?



27. Institute of Advanced Motorists, 'Licensed to Skill Report', 2011

28. rospa.com/faqs/detail.aspx?faq=298



"Driving a car is the most complex and challenging activity most of us do on a...

... daily basis. It needs full concentration and you need to have your wits about you. Mobile phones and driving are a lethal combination – potentially more dangerous than driving under the influence of drink or drugs – whether you are on the move or stationary at lights or in a traffic jam. There are no two ways about it – mobile phones are a distraction, taking your mind and your eyes off the road. Texting, tweeting, looking at Facebook, emailing, surfing the net, taking or making calls – all are major distractions affecting your ability to monitor and negotiate traffic safely. Our advice to motorists is loud and clear: switch it off when you're behind the wheel – no call or text or email is worth risking your life or the lives of others – your mobile can wait."

Simon Best

Chief Executive, Institute of Advanced Motorists

4.0 Blue light – keeping law and order

4.7 70mph

Britain's first section of motorway was the Preston Bypass in Lancashire (now part of the M6), which opened in 1958 by the then Prime Minister Harold Macmillan. With grassy 'soft' shoulders and no central barrier, it was a far cry from the modern motorways we know today²⁹. However, it wasn't until seven years later in 1965 that Britain's 70mph top speed limit was imposed on motorways in what was supposed to be only a temporary measure³⁰.

In 2014's 'Motoring Britain' motorways and cars have changed beyond all recognition but one thing remains the same – the speed limit is still 70mph.

For many years, the Report on Motoring has highlighted that motorists are more likely to speed on motorways than on any other roads and this remains true today. In fact, two thirds (67%) of drivers admit they speed on the motorway, a 2% rise on last year and a 4% rise compared to 2012. However, this figure is still lower than the 73% of motorway speeders reported in 2010 and may well reflect the fact that motorists were moderating their speed to save fuel when it was at its most expensive and least affordable because of the economic downturn.

Across all motorway drivers the average speed is 72.5mph. Thirty five per cent claim to reach speeds of 80mph, with only a small minority (4%) driving at 90mph or more.

There still seems to be a perception that speeding is more acceptable and somehow less serious than other motoring offences. In particular, exceeding the speed limit on motorways is seen as acceptable by a greater proportion of motorists than speeding on other roads.

Four in 10 (41%) feel that it is perfectly acceptable to travel at up to 80mph in a 70mph limit. However, just 12% of motorists think it is appropriate to drive at 40mph on roads where the speed limit is 30mph.

Motorists are generally content with the current speed limits on our roads, with the exception of motorways. Seventy per cent say they would like to see the speed limit on motorways increased and this desire for higher speed limits has remained relatively consistent over several years. In 2009 and 2011, 70% of drivers also called for an increase in the speed limit on motorways.



of motorists think the speed limit for motorways should be 80mph or above



of drivers admit they speed on the motorway



of company car drivers are more likely to exceed the speed limit on the motorway



of motorists feel that it is perfectly acceptable to travel at up to 80mph in a 70mph limit

More than two thirds (70%) of motorists think the speed limit should be 80mph or above and this increases to 80% of experienced motorists with 25-40 years of driving behind them.

Motorists that exceed the speed limit on the motorway are more likely to be male (77%, compared to 59% of females), company car drivers (88%), socio-economic groups ABC1 (76%) and living in the South East (76%).

Motorists' reasons for speeding on the motorway

"To get to my destination quicker."

"To use my car more economically."

"To safely manoeuvre around traffic."

"To overtake someone, particularly those hogging the middle lane."

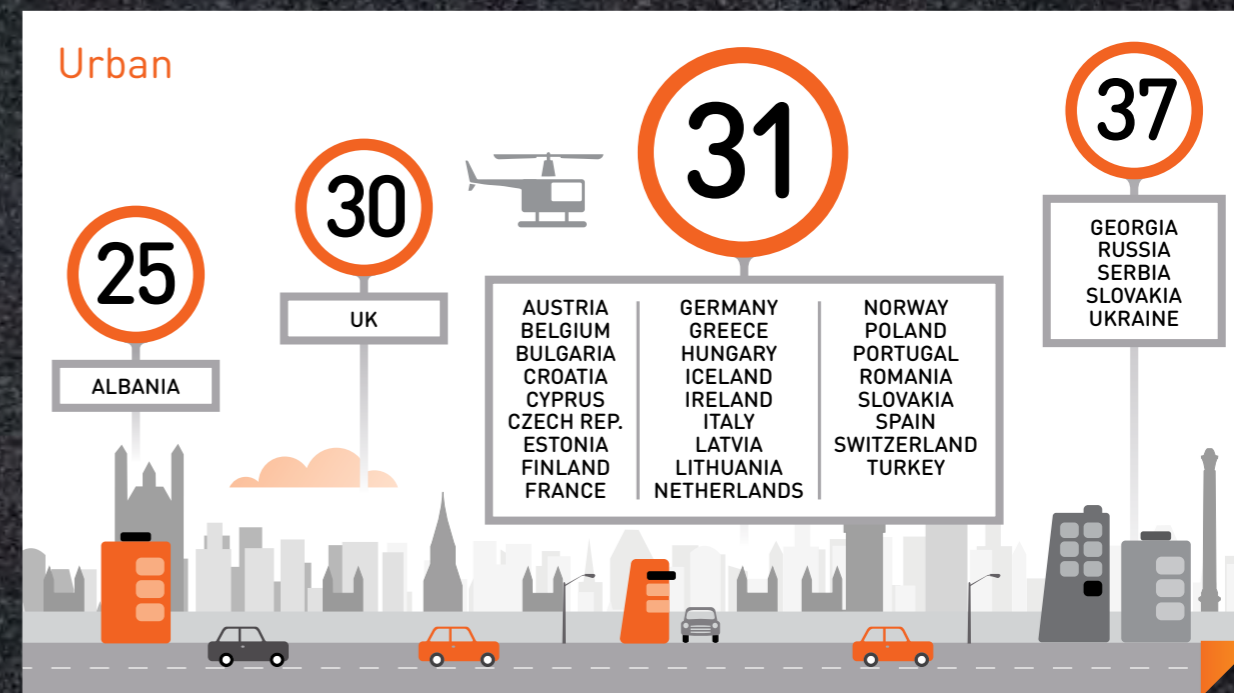
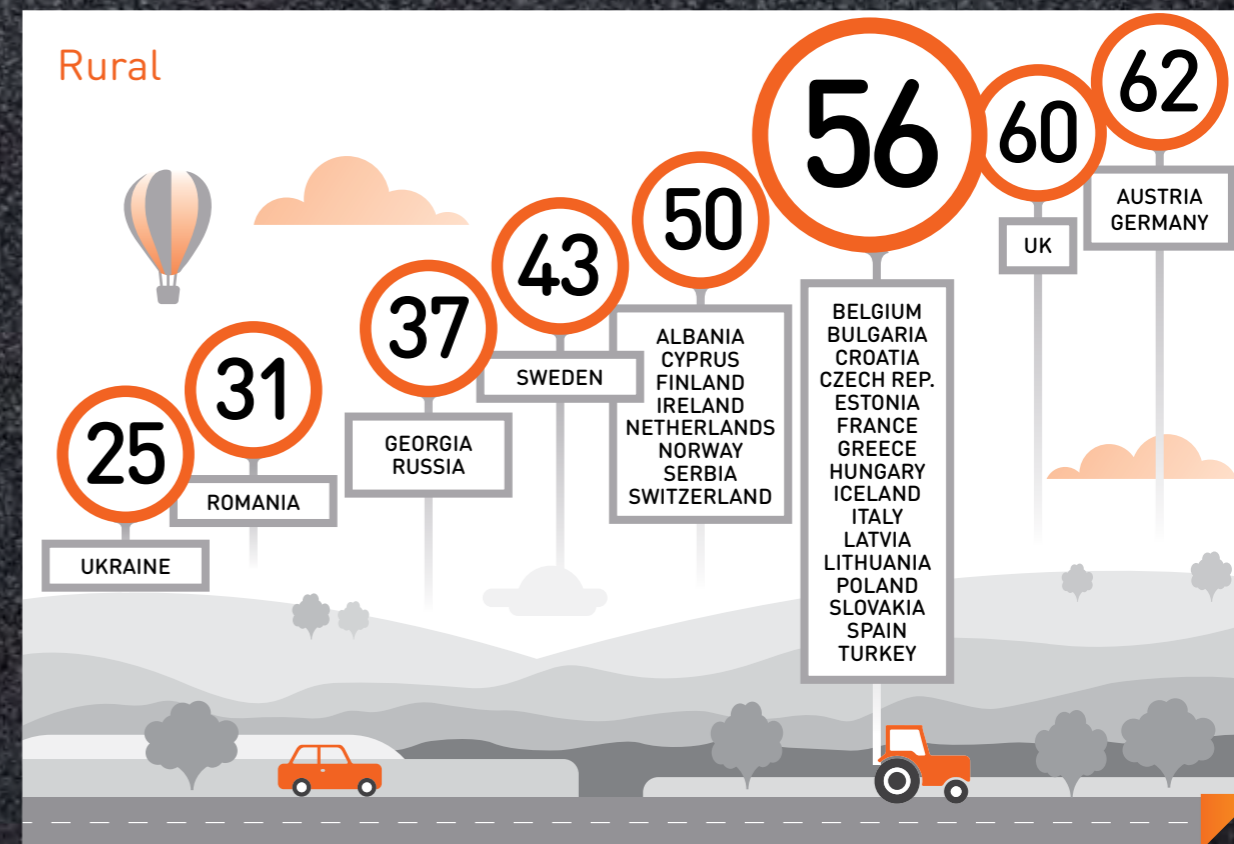
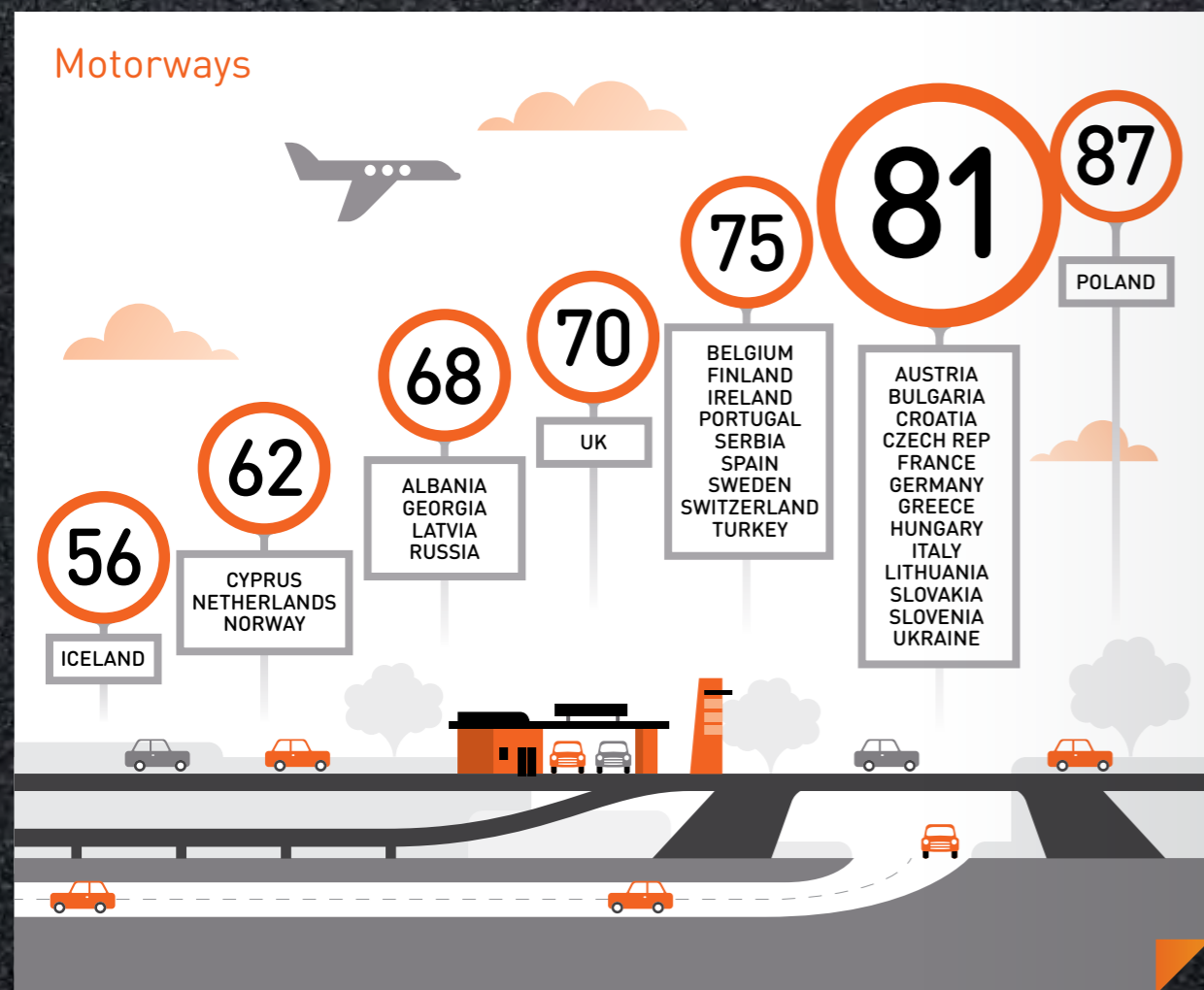
29. ciht.org.uk/motorway/stats.htm

30. uk.news.yahoo.com/on-this-day--70mph-speed-limit-imposed-on-motorways-164136359.html#KvLozyk

4.0 Blue light – keeping law and order

European Speed Limits

Speed limits vary widely across European countries. See how the UK compares for motorways, rural and built-up areas³¹.



31. cars.uk.msn.com/news/speed-limits-in-europe-%e2%80%93-how-does-the-uk-compare

4.0 Blue light – keeping law and order

4.8 20mph

While the majority of motorists (58%) are generally happy with the 20mph speed limit in urban area zones, the number of drivers admitting to driving above the speed limit in these areas has increased from 36% in 2013 to 44% in 2014. Compliance is now on par between 20mph and 30mph areas.

Those motorists who are exceeding 20mph in these zones are not grossly exceeding the limit. The overall average speed that motorists claim is 21.4mph, with 22% admitting driving at 25mph and just 8% admitting to driving at 30mph.

There is overwhelming support for 20mph limits when there is a clear justification. Nine in 10 (91%) motorists see 20mph speed limits as worthwhile near schools, rising to 95% of drivers who have children.

There is also widespread acceptance of 20mph zones in accident black spots with 76% of motorists supportive. This rises to 84% of motorists living in Scotland.

Most motorists (61%) also support the implementation of 20mph zones in residential areas and 64% of Londoners agree '20 is plenty' in streets where people live.

However, support falls considerably for 20mph speed limits outside residential areas with 74% arguing it should never be implemented on 'through roads' and this could be a factor in the decrease in compliance in the past 12 months.



admit to driving above the speed limit in urban area 20mph zones



of drivers who have children support 20mph speed limits near schools



“Those motorists who are not complying with 20mph limits are, in the majority of cases, still travelling at less than 30mph, with the average speed in 20mph zones being 21-22mph. The deteriorating compliance in 20mph limits is a real cause for concern, which implies more work is needed to improve compliance with this lower speed limit.”

David Bizley
Technical Director, RAC

4.0 Blue light – keeping law and order

4.9 30mph

In contrast to 20mph limits, the proportion of motorists admitting to exceeding 30mph limits on urban roads continues to decline.






Forty two per cent of drivers admit to speeding in 30mph limits, down 15% since 2010. Motorists who have a high annual mileage in excess of 12,000 miles per year are more likely to speed in urban areas, with half (50%) admitting to exceeding the 30mph limit. In contrast, six in 10 (61%) of motorists aged 65 and over claim they never speed on 30mph roads.

4.10 Speed limit compliance – in summary

A review of motorists' speed limit compliance levels over the past five years reveals a mixed picture. Overall, compliance at all speeds is no worse, and in some cases significantly better, than five years ago.

However, this doesn't tell the whole story with compliance having peaked in 2012 with only compliance at 30mph continuing to improve since then.

Proportion of motorists who break the speed limit:

	2010	2011	2012	2013	2014
 Motorways	73%	67%	63%	65%	67%
 Urban roads	57%	50%	46%	41%	42%
  Country roads	45%	38%	37%	40%	43%
 Urban area zones	44%	38%	36%	36%	44%



Motorists' reasons for speeding on urban 30mph limit roads

"Late at night there are no other users or pedestrians on the road."

"If the road is quiet then 30mph is very slow."

"It's easy to exceed 30mph without realising."

"It is sometimes safer in some circumstances."



4.0 Blue light – keeping law and order

4.11 One for the road? Driving under the influence

The Road Safety Act of 1967 introduced the first legal maximum blood alcohol (drink-driving) limit in the UK³². Since then, the number of motorists driving under the influence has fallen dramatically.

In 1979, which is the first year for which accurate records of drink-drive attitudes, behaviour and casualties are available, 28 people were killed or seriously injured every day in drink driving accidents on British roads. By 2009, this number had fallen to just four a day³³ – a seven-fold reduction³⁴.

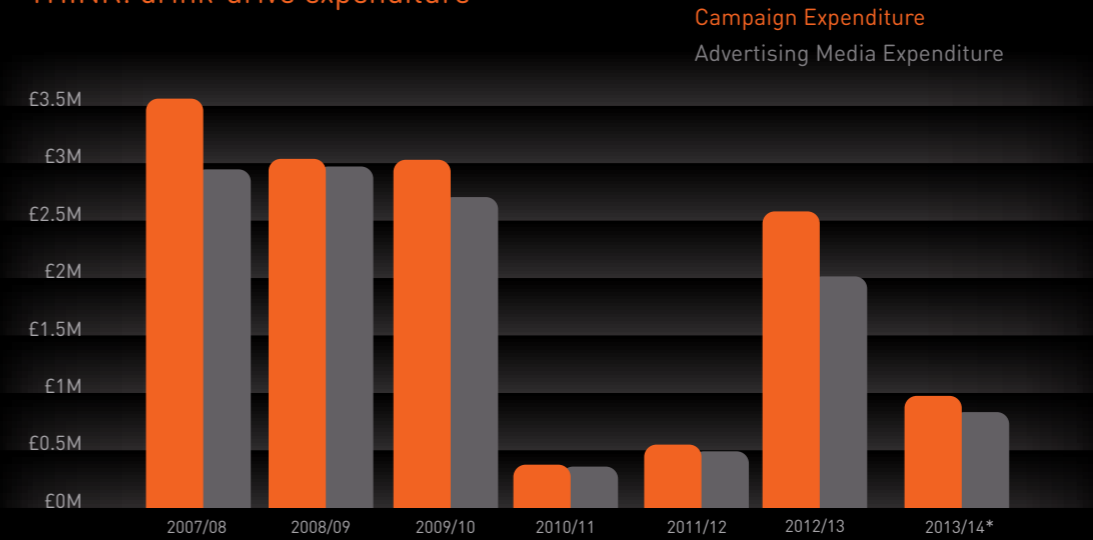
The vast majority of motorists do not drink and drive. Six per cent of drivers admit to knowing or suspecting they have driven in the last 12 months while over the limit shortly after consuming alcohol. And, 11% of motorists believe or suspect they have done so the morning after a night out. However, younger drivers are more likely to drink and drive with 14% admitting to knowing or suspecting they have driven under the influence the morning after.

Fortunately, the percentage of drivers admitting to drink drive behaviour has decreased steadily. It was a different story back in 2006, when nearly one in five (19%) motorists claimed they occasionally got behind the wheel after exceeding the legal limit and some 32% of drivers of company and luxury cars admitted to doing on 'rare occasions'³⁵.

The Government's hard-hitting anti drink-drive campaigns over the past 30 years are widely credited with being instrumental in highlighting the dangers of driving under the influence, changing motorists' behaviour for the better and making it socially unacceptable to drink and drive.

Motorists fully support the Government's drink-drive campaigns. Over two thirds (68%) believe that campaigns warning against drink driving should be a priority and it is the number one road safety campaigning priority for over a third (35%) of motorists.

THINK! drink-drive expenditure



The table** above shows the Department for Transport's expenditure on the THINK! drink-drive campaigns from 2002-present³⁶



"Results from the ONS Crime Survey for England and Wales suggest around 0.5% of drivers admitted to driving under the..."

... influence of drugs in the past year. This figure has fallen over the last couple of years, although we don't have a definitive reason for it. We have recently commissioned an evaluation to understand drug driving better and assess the impact of the new drug driving offence."

Fay Graves

Road Safety Statistics, Department for Transport

32. drinkdriving.org/drink_driving_information_uklawhistory.php

33. gcn.civilservice.gov.uk/wp-content/uploads/2012/12/Department_for_Transport_How_thirty_years_of_drink_drive_communications_saved.pdf

34. gov.uk/government/uploads/system/uploads/attachment_data/file/269601/rrcgb-2012-complete.pdf

35. RAC Report on Motoring 2006, page 38

36. gov.uk/government/uploads/system/uploads/attachment_data/file/291955/drink-drive-costs.pdf

* Estimated as final figures are not available until the end of the financial year

** The table was prepared using a range of sources held by the Department for Transport and provides an estimate of the advertising campaign expenditure where the information is available in an existing source. Campaign expenditure refers to all spend relating to Drink Drive including advertising media, production, PR and research. Advertising media expenditure is also given for the years where the full campaign expenditure is not available. Advertising media expenditure refers to bought advertising space such as radio, TV and outdoor spaces/slots.

4.0 Blue light – keeping law and order

4.12 Drink-drive passengers

In the past couple of years, there has been a small fall in the percentage of 'drink-drive passengers', (i.e. those drivers who believe they have travelled in a car as a passenger in which the driver was over the limit) with the number falling from 12% in 2011 to 10% in 2014.

There is a strong link with age. Younger drivers are almost four times more likely than someone aged 45-64 to have travelled in a car over the last 12 months as a passenger with a driver they know or suspect to be over the legal alcohol limit (19% compared to 5%).

4.13 Drug-driving

Incidences of drug-driving are lower than drink-driving with those admitting to driving under the influence of drugs or being driven by someone under the influence of drugs over the last 12 months representing just 3% of the motoring population. Not surprisingly, younger drivers are more likely to have experienced drug-driving either as a driver or a passenger (8% of 17 to 24-year-olds).

Impairment by drugs was recorded as a contributory factor in about 3% of fatal road accidents in Great Britain in 2011, with 54 deaths resulting from these incidents. This compares to 9% or 156 fatal road incidents, with 166 deaths, which have impairment by drink reported as a contributory factor³⁷.

Drug-driving laws are changing. In May 2012 the Government introduced primary legislation that would create a new offence of driving with a specified controlled drug in the body above a specified limit for that drug³⁸. Regulations are now being drawn up and the Government has just completed two initial consultations seeking stakeholder views³⁹. The new laws are expected to come into effect in early 2015.

 3%

of the motoring population admit to driving (or being driven) under the influence of drugs

37. gov.uk/government/uploads/system/uploads/attachment_data/file/167971/drug-driving-expert-panel-report.pdf

38. gov.uk/government/speeches/drug-driving-27-march-2014

39. gov.uk/government/speeches/drug-driving-27-march-2014



"It is extremely encouraging that the number of road casualties caused by drink driving has fallen significantly since 1979. However, there is no room...

... for complacency. Provisional estimates for 2012 suggest that 280 people were killed in drink-drive accidents, an increase of around 17% compared with 2011 and accounting for 16% of all road deaths in Great Britain[1]. It is vital that the Government presses ahead with measures to make enforcement more effective and efficient, including long-overdue evidential roadside breath-testing and closing legal loopholes. We also need to keep repeating the message that drinking and driving is wholly unacceptable."

David Davies

Executive Director, Parliamentary Advisory Council for Transport Safety

5.0 A safer future?

The number of children being killed or injured on the Britain's roads in recent years is at its lowest in decades. >



5.0 A safer future?

In 1979, 396 children died as a result of a road traffic accident and 7,398 were seriously injured⁴⁰. Over 30 years later, British roads are much safer and the number of children killed or seriously injured have fallen dramatically, however, sadly, in 2012, 61 children lost their lives and 2,211 children were seriously injured⁴¹.

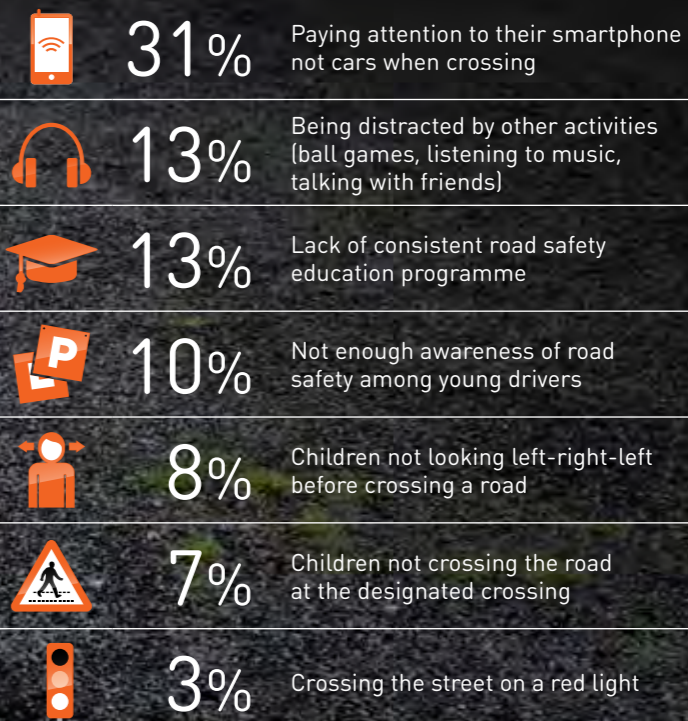
5.1 Starting young – child road safety

The majority of motorists (69%) feel children are as safe, if not safer, than when they were young. Over 65s are more likely to think that children are safer than when they were young and those living in Northern Ireland are less likely to feel so than those living in Great Britain.

Surprisingly, the vast majority of motorists don't have strong views about how satisfied they are with child road safety education in primary and secondary schools – whether or not they have school age children. Over a third (36%) claim they don't have any opinion, including 23% of parents. And, while a quarter (24%) of parents with children living at home are 'fairly satisfied' with their children's road safety education at school, some 17% expressed dissatisfaction.



Other child road safety concerns raised by motorists:



"The road safety education our schoolchildren get is currently patchy to say the least. A more consistent and evidence-based...

... approach is needed. Road safety training has a vital role to play in giving them the skills they need for independent mobility which is important for promoting physical activity. Education can shape attitudes towards risk and make young people more aware of the dangers on the roads and equip them with skills to stay safe."

David Davies

Executive Director, Parliamentary Advisory Council for Transport Safety

40. gov.uk/government/publications/reported-road-casualties-great-britain-annual-report-2012 RAS30064 Reported pedestrian casualties by age, Great Britain 1979-2012

41. gov.uk/government/publications/reported-road-casualties-great-britain-annual-report-2012 Department for Transport RAS41001 Reported pedal cycle casualties by age, Great Britain, 1979-2012

5.0 A safer future?

When asked about what they see as the greatest child road safety concern, motorists identified modern distractions such as smartphones as the priority issue that needs to be addressed. Thirty-one per cent of motorists voiced concern about children being distracted by their smartphone and not concentrating when crossing the road. Motorists aged over 45 years (39%) are particularly worried about the impact of smartphones and the resulting lack of awareness of

their surroundings. This is particularly poignant when considering that the most at risk age group are 11 to 12-years olds who are invariably walking to school on their own, perhaps for the first time, and this is also the most common age when children first get their own mobile phone.

'Traditional' distractions such as playing ball games and talking with friends are still seen as a threat to children's road safety by 13% of motorists.



"As the motorist's champion, the RAC is committed to making our roads safer places for everyone and we believe engaging road...

... users from a young age and championing safety education in schools will be one key factor to achieve this. Road casualties in the UK might be at a record low but greater effort is needed to cut child fatalities to zero. Every life lost is one too many and another family devastated."

Pete Williams
RAC Head of External Affairs

Visit rac.co.uk/community/road-safety-champions to find out more about Horace and the RAC's Child Road Safety Campaign

5.2 Here's Horace...!

The RAC has teamed up with the Department for Transport's THINK! campaign and Aardman Animations to launch a national child road safety programme. 'Horace Champion', the 21st Century's version of 'Tufty the Squirrel' will ensure a whole new generation understands the importance of road safety and help prevent more children being killed or seriously injured on Britain's roads. Horace is heading up the ground-breaking initiative to encourage school children to create

their own short, animated films to communicate key road safety messages to their peers.

The RAC campaign has been incorporated into the THINK! website and road safety resource packs produced for schools and children's organisations.

The winning entries will be used nationally to illustrate road safety messages that the children feel are important.



AURASMA

DOWNLOAD THE FREE **AURASMA** APP from the App Store or Google Play

- ▲ Tap this icon on your screen
- 🔍 Search for 'RAC Road Safety'
- 📺 Follow the channel
- 📱 Point phone at the page

RAC Child Road Safety Campaign

Watch the campaign launch video in augmented reality using your smart phone or tablet. Follow the instructions above

5.0 A safer future?

5.3 Are you sitting comfortably?

With heavy snow, monsoon-like rainfall, flooding and winter storms, the past three years has brought a potent mix of extreme weather patterns that has wreaked havoc on transport in Britain, causing major disruption and huge challenges for motorists as they tried to go about their daily lives.

But what driving conditions do British motorists fear the most and how do they change their driving behaviours as a result?

A significant eight in 10 (79%) motorists admit to feeling uncomfortable driving on icy roads

and the vast majority (95%) of those who are uncomfortable, try to avoid driving when it's icy. Of those, more than half (51%) will rarely do so and a further 44% will try to minimise how much they drive when it is icy.

And, there is a definite gender split when it comes to driving in freezing conditions. A quarter (25%) of female motorists refuse to drive when there is ice on the roads, compared to just 13% of male drivers.

Most motorists are not fans of driving in the snow either! Seventy two per cent of drivers are uncomfortable driving when it is snowing with the majority (96%) of those who are uneasy about it, avoiding driving in those conditions



“When extreme weather hits bringing roads to a standstill, it is easy to blame a myriad of things we can't control such as climate change, not enough salt on the...

... roads or the actions of other drivers, but we all need to accept personal responsibility. That means taking note of severe weather warnings, staying at home if necessary and if we do have to venture out, being as prepared as possible and adjusting how we drive to suit the conditions of the roads.”

Simon Best
Chief Executive, Institute of Advanced Motorists

Visit rac.co.uk/advice/winter-driving for advice on driving in adverse weather

whenever they can, leaving 4% of those motorists who would drive as normal despite the snow. Young drivers are significantly more likely to feel uncomfortable (85%) than older, more experienced drivers (75%) and similar proportions among those actively avoid driving in the snow.

When it comes to the rain, most motorists continue to drive as normal, even though 34% feel uncomfortable when doing so.

The record-breaking rainfall and flooding that hit many areas during the period December 2013 to March 2014 presented motorists with a new set of challenges. However, these occurred at a time of the year when the UK normally experiences more severe ice and snow.

The UK weather has conspired against motorists in recent years and periods of severe weather seem to be getting more frequent and much more extreme and the flooding was a further example of this. General advice is to stay at home during treacherous weather conditions, however, it is not always practical for motorists to do so. Life needs to go on and preparation and planning is vital to ensure motorists are equipped for whatever the weather throws at us.



of motorists admit to feeling uncomfortable driving on icy roads



of young drivers avoid driving in the snow

5.0 A safer future?

5.4 Outside the comfort zone

It's not just inclement weather that puts off drivers. Driving at night presents challenges for many motorists. Over a third of motorists (38%) feel uncomfortable when driving after dark. Of those, 45% avoid it most of the time or a lot of the time.

It is a particular concern for older motorists who are uncomfortable driving in the dark with 93% of those motorists who are aged 65 and over actively avoid driving at night or in the morning when it is still dark. This may be in part due to the fact that older drivers are more sensitive to glare than younger drivers because their eyes take longer to adjust to changing light levels⁴².

However, it is noticeable that as they get older, the majority of drivers tend to self-regulate and adapt their driving patterns to cope with these kinds of difficulties.

A quarter (26%) of motorists feel uncomfortable driving on the motorway and, again, it is older drivers who show common sense and are more likely to plan their journeys to avoid driving situations which make them uneasy. Nearly nine in 10 (88%) of older driver who are uncomfortable driving on the motorway try to steer clear of them, which changes to 68% of younger drivers who felt the same.

 **93%**

of motorists aged 65 and over who are uncomfortable driving in the dark actively avoid it

 **88%**

of older drivers who feel uncomfortable driving on the motorway try to steer clear of them

42. seniordriving.aaa.com/understanding-mind-body-changes/vision/driving-night-managing-glare



"No longer can we regard severe weather as isolated incidents. As the climate changes we all need to revise our view of what is 'normal' and be...

... prepared to deal with the unexpected. When we are warm and snug in our modern cars it is easy to get complacent and think we are immune to the elements and that we have the technological resources to deal with whatever nature might throw our way – the reality is we do not."

Professor Stephen Glaister
Director
RAC Foundation

6.0 RAC calls to action

1 The RAC acknowledges the benefits to the economy of the Government's freeze on fuel duty over the last three years. However, there are powerful arguments to go further and the RAC endorses FairFuelUK's call for a further cut in fuel duty of 3p to sustain growth in the economy, create lasting jobs and boost GDP.

2 Recent estimates suggest an investment of £12bn is required in England alone to bring the road network back to a state that is fit for purpose.

The RAC calls on the Government to give the highest priority to a nationwide programme of repair and proactive preventative maintenance backed by funding of a magnitude consistent with the scale of the problem.

The RAC also calls on those responsible for both local and strategic roads to adopt an approach which fixes defects 'once only' by addressing the underlying cause and eradicates the repetitive 'patching up' seen in recent years.

3 The 2014 RAC Report on Motoring has highlighted a deterioration in drivers' understanding of current motoring law and best driving practice over their motoring lives after passing their test. The RAC calls on the Government to consider how this might best be addressed, possibly by periodic refresher training using computer-based training modules.

4 The research for the 2014 RAC Report on Motoring demonstrates the continuing need for greater awareness of the dangers of drivers using mobile phones and texting regardless of whether their vehicle is stationary or on the move.

The RAC calls on those accountable for enforcing the current laws on the use of hand-held phones while driving to do so more effectively. This must be supported by a high-profile, government-funded road safety campaign that makes using a hand-held mobile phone at the wheel as socially unacceptable as drinking and driving.

5 Earlier in this Parliament, the Roads Minister announced plans for an objective trial to understand the safety, environmental and economic benefits and disadvantages of raising the speed limit to 80mph on appropriate stretches of motorway, but these plans were subsequently shelved.

A majority of motorists would still like to see the 70mph limit raised to 80mph and the RAC, therefore, calls on the Government to reinstate plans for a trial of 80mph on appropriate motorways in combination with robust enforcement.

6 The RAC recognises the benefits of 20mph limits near schools, accident black spots and in residential areas. However, the RAC calls on the Government to provide clearer guidance to local authorities so that 20mph limits are not imposed on through routes and there is greater consistency in their application from area to area to avoid the risk of confusion amongst drivers.

7 While the numbers of children killed or seriously injured on our roads is at an all-time low, there are worrying areas of increased risk such as the distraction to child pedestrians caused by their use of mobile phones and particularly smartphones.

The RAC acknowledges the excellent work undertaken by local road safety professionals and teachers and the high quality supporting training and campaigning aids developed both at national and local level. The RAC, therefore, calls on the Government to maintain momentum in reduction of child road safety casualties by taking the lead to create a lasting framework that ensures greater consistency in the way that child road safety education is delivered and encourages the greater sharing of best practice. Consideration should also be given to investing in a government-funded national campaign targeted at the most at risk 12 to 15-year-olds.

Go to rac.co.uk/advice/report-on-motoring to find out more and have your say

7.0 Who is the motorist?

Miles per year



0-1,000 miles	5%
1,001-3,000 miles	10%
3,001-6,000 miles	23%
6,001-9,000 miles	15%
9,001-12,000 miles	20%
12,001-15,000 miles	6%
15,001-18,000 miles	2%
18,001-21,000 miles	3%
>24,000 miles	6%

Average mileage (all motorists)



1 0 1 6 8

Miles

Types of vehicle



Mini/supermini
(55% of 17 to 24-year-olds and 34% of 65+)

30%



Lower medium

26%

Upper medium
(13% male drivers)

11%



MPV/people carrier

7%

Executive/luxury/sports

15%

4x4/SUV
(up 10% on 2013)

15%

Van
(up 4% on 2013)

6%

Number of cars per household



Households with one car

51%

Households with two cars

38%

Average number of cars for households in which 17 to 24-year-olds live

1.9

Average number of cars in ABC1 households

1.7

Average number of cars in rural areas

1.8

Age of vehicles



Average age of vehicles in 2014 (average in 2013 was 5.4 years, compared to 5.1 in 2012)

Between 3-4 years old

Motorists who own a car less than a year old

11%

Motorists who own a car between 5 and 10 years old

34%

8.0 Appendix

8.1 Research methodology

The RAC Report on Motoring 2014 is based on a large-scale internet survey carried out by Quadrangle on behalf of the RAC.

In total, Quadrangle interviewed 1,526 British motorists (i.e. those who hold a current driving licence and drive at least once a month). The survey was conducted in February 2014, with the questionnaire taking around 25 minutes to complete.

The sample was nationally representative of age, gender, socio-economic groups, all GB regions, company car drivers and new car buyers.

8.2 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



9.0 Company overview

Contacts

With over eight million members the RAC is one of the UK's most progressive motoring organisations, providing services for both private and business drivers.

The RAC is committed to providing the very highest levels of service to its members. From roadside assistance to insurance, vehicle inspections and roadside checks to legal services, and up to the minute traffic and travel information, the RAC endeavours to meet drivers' needs.

Today, the RAC is quietly undergoing a revolution re-launching itself with a refreshed brand identity and a new range of products and services including: RAC Business Club and Fuel Card for fleet managers; RAC Cars website offering buyers a safer way to purchase a used car; and RAC Advance – state-of-the-art telematics technology.

As the UK's oldest motoring organisation the RAC continues to be at the fore of innovation, driven by its vision to be the motorists' champion and one-stop-shop for all motoring needs.

Advisory Panel

This report was guided by the expert contributions of the RAC Report on Motoring Advisory Panel.

Chaired by David Bizley,
Technical Director, RAC

Simon Best, Chief Executive,
Institute of Advanced Motorists

David Davies, Executive Director,
Parliamentary Advisory Council
for Transport Safety

Professor Stephen Glaister,
Director, RAC Foundation

Fay Graves, Vehicle Safety Statistics,
Department of Transport

Mike Hawes, Chief Executive
The Society of Motor Manufacturers
and Traders

Stephen Joseph, Executive Director,
Campaign for Better Transport

David Leibling,
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Connect

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