



RAC Report on Motoring 2013

A Motoring Nation



1989-2013 Silver Anniversary Edition

RAC Report on Motoring Contents

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The first Report on Motoring was launched in 1989 and was based on research conducted at the end of 1988 and early 1989. This is the 25th edition of the report and all comparative figures are based on data from the years 1989 to 2013 with 2012 figures where 2013 were unavailable.

Foreword

Murray Walker

Murray Walker is the familiar and much-loved voice of motor racing with his distinctive, passionate and gentlemanly style of commentary and an encyclopaedic knowledge of the sport and its personalities...

"I have witnessed significant advances in Formula 1 over the last 25 years and the pace of change has been equally dramatic for the motorist and the evolution of the motor car.

Today's vehicles, like today's journeys, are a world apart from those of 25 years ago. The quality of engineering and design has enabled huge advances in safety, performance and efficiency, but it is very clear that being a driver today is more challenging and stressful than ever.

In 1989, when the first RAC Report on Motoring was published, I was driving a BMW 320 and I remember four star petrol cost £1.56 a gallon. Motorists in 2013 are now paying over £6 a gallon and, although it is very likely that the cars they are driving are more fuel efficient, running a car today commands a bigger share of the household budget than ever before.

So for many the cost of motoring is their biggest concern and has actually forced them to think twice before they make a journey, even though the majority say that they are more reliant on the car than at any point in time.

While car dependency is higher than ever, we have reached a watershed in terms of the funding for the maintenance and development of our road network. Financial pressures are affecting spending at all levels and we now need to think hard about ring-fencing investment for road improvements or face the long-term consequences of under-investment. And, while British drivers are in pole position in Formula 1, many young people feel they are being priced out of driving.

Many are leaving learning to drive until later, but what they are also telling us is that they would like more support and training to equip themselves to drive more confidently and safely.

For me courtesy to fellow drivers is a big issue. We all share the roads with other users including cyclists, pedestrians and motorcyclists, and it is not much to ask that we behave respectfully to one another.

Everyone knows me from reporting on the grid next to the finest F1 cars and drivers in the world, but I have always been passionate about motoring in all its forms and I still cherish the joy of the open roads and the freedom it gives you. That is why I am delighted to introduce the 'silver' edition of the RAC's Report on Motoring which provides a powerful insight into the views of drivers in this great motoring nation of ours."

Murray Walker




Executive summary

Today, there are nearly 30m car drivers in the UK, many using their cars every day to commute to work, go shopping, transport their families and socialise.

This silver anniversary edition of the RAC Report on Motoring explores their behaviour and attitudes to motoring, providing a comprehensive snapshot of exactly what it's like to be a motorist in Britain today, and details the sweeping changes that have occurred in motoring since 1989.

It includes the pressing issues on motorists' minds in 2013, the impact of the cost of motoring, views on government transport policy, the behaviour of other drivers and road safety concerns.

It is based on research from a sample of 1,542 British drivers and commentary from a distinguished panel of motoring experts¹ in March 2013.

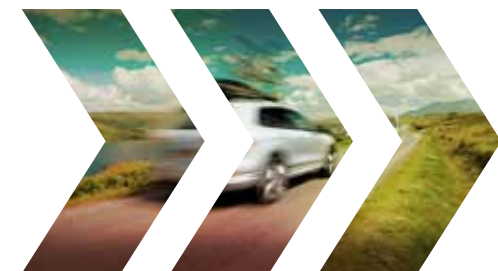
There are a number of key findings in this year's report which include:

The biggest perceived change in the last 25 years is the increased **cost of motoring**. 61% of motorists say this is the most noticeable change over the past quarter of a century. And, looking at the issues that today's drivers worry most about, cost is the primary concern for nearly half (46%) with the cost of fuel a particular worry for those living in rural and suburban areas. Even more drivers this year are being forced to curtail their social lives due to the rising cost of motoring (14% this year, compared to 9% in 2012).

Despite feeling the pinch, motorists are **more dependent on their cars than ever before**. Nine out of 10 motorists (89%) are more reliant on their cars today than they were 25 years ago and 78% of all drivers agree they would find it very difficult to adjust to a car-free lifestyle.

Motoring taxation continues to annoy motorists. Just one in 10 drivers are both aware of, and happy with, the current balance of motoring taxes. Nearly half of motorists (49%) are unhappy with the balance and there is significant support for shifting the weighting from fuel duty and vehicle excise duty (car tax) towards paying to drive on motorways and in city centres. Many (47%) believe the high taxes levied are used to deter them from using their car and a significant 90% of motorists believe they are hit by high taxes because they are easy targets for the Government. Just 17% of drivers think the current level of motoring taxes is a fair price for their motoring freedom.

The **condition and maintenance of UK roads** comes in for particular criticism from motorists this year and is one of the top three concerns for 2013. 84% of motorists believe the condition of their local roads is deteriorating, an increase of 15% from five years ago. And three quarters of motorists (75%) say the condition of motorways and other main roads is getting noticeably worse, up 5% from 2010. In rural areas, the issue is much worse – nine out of 10 (87%) drivers berate the poor condition of roads after successive harsh winters have increased the number and severity of potholes.



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

Executive summary

Motorists are very concerned about **road safety issues and in particular, the behaviour of other drivers** which is deemed to have deteriorated over the last five years. Two thirds (65%) think road rage has got worse instead of better and 62% believe the courtesy of other drivers has slipped. But, for 76% of motorists, other people using a hand-held mobile phone is a source of stress.

Technology is seen as both a blessing and a curse to motorists.

The majority (86%) recognise that cars are safer today and 63% think it has made them safer than ever before. However, there are concerns that in-car technology can be a distraction to drivers. Almost a quarter of motorists (23%) believe sat-nav has made driving today less safe. The three biggest distractions for drivers are still talking to passengers (89%), adjusting car controls (80%) and eating or drinking (49%).

Motorists' speed limit compliance

has improved over recent years, however this has plateaued in 2013 and the greatest non-adherence of speed limits still occurs on motorways. Nearly two thirds of motorists (65%) admit to breaking the 70mph speed limit, compared to 63% in 2012, but compliance is far better in 20mph urban zones because motorists understand that they are near schools and accident blackspots.

Young drivers have polarised views both on learning to drive and on how well this equips them to drive safely.

Over a third (35%) of young drivers believe the standard driving test does not test all of the skills required to cope with the demands of driving today and three in 10 (30%) did not feel confident after they passed their driving test. More than half (53%) say they would have liked supervised driving practice on the motorway as part of their driving lessons.



1.0 1989-2013 Celebrating 25 years of motoring

Margaret Thatcher was Prime Minister, Ronald Reagan had just left the White House, a pint of milk set you back just 28p, a loaf of bread only 62p² and mobile phones weighed more than 4kg³ when the first RAC Report on Motoring⁴ was published 25 years ago in 1989. >

But it's not just politics, the cost of groceries and mobile phones that have changed over the past quarter of a century; Motoring Britain is a vastly different place in 2013 than it was in the late 1980s.

In this our 'silver anniversary' edition, we ask just what are the biggest changes to motoring in Britain over the past 25 years of RAC Reports on Motoring? And, what is the impact of these sweeping changes on British motorists – are they for better or worse, richer or poorer?



2. Office for National Statistics

3. <http://www.talktalk.co.uk/mobile/galleries/view/mobile/retro/browse/609366>

4. The RAC Report on Motoring launched 25 years ago as the LEX Report on Motoring. The name changed in 2000 following the sale of RAC Motoring Service to Lex Services plc. For clarity, all previous versions are consistently referred to as the RAC Report on Motoring

1.0 Celebrating 25 years of motoring

1.1 What we were driving in the 1980s...

We used the RAC Facebook page to ask members what they drove back in the 1980s, when the very first Report on Motoring was published...



"I had my Sierra for 10 years and loved it. I cried when the new owner drove it away. I've now got a Ford Focus. Driving just seems more of a chore now and the price of petrol makes you think twice about every journey..."

Wendy, West Sussex

"I bought my dream car, a Ford Capri, in 1977 and drove it throughout the 1980s only replacing it with a Renault 21 in 1990. On a road trip through the Alps it betrayed the advertising promise and performed more like a sheep in wolf's clothing."

John, Glasgow



"I bought this MK1 Mini Cooper S in the late 80s and I've still got it. Now it's considered a real classic and worth quite a bit. I still love driving it now as much as I did then, but not near speed cameras or potholes."

Richard, Hampshire

"I owned this 1972 MGB GT for 13 years. Now I drive an Audi estate which isn't as much fun but at least the heater works."

Ian, Buckinghamshire



"Pictured here in 1989, my last year at uni, posing in a 1971 Triumph Herald convertible. I bought it in Glasgow for £700. Motoring costs me a lot more today, although I still enjoy driving my new Mini Cooper."

Jamie, Scottish Highlands



1.0 Celebrating 25 years of motoring

1.2 Prices at the pumps

One of the biggest changes to motoring in the past quarter of a century has been the huge increase in fuel prices. In 1989, the average cost of unleaded petrol was **38.5p** per litre and diesel cost **36.1p** per litre⁵. Remember the outcry when fuel went over £1 per litre for the first time? In May 2013, however, you can expect to pay **134.2p** for a litre of unleaded and **138.9p** for a litre of diesel⁶ – a whopping increase of 264% in just two and a half decades.

1.3 Taxing times

Fuel Duty

In 1989, the fuel duty on unleaded petrol was **17.7p** per litre and **17.3p** per litre on diesel⁷ and the revenue from road fuel duties in 1988/89 was £8.7bn⁸. Today, the total cost of fuel duty has soared by over 240% to **57.95p** per litre for both petrol and diesel, netting the Treasury approximately £26.8bn⁹ in 2011/12.

VAT

Drivers are dealt a double tax whammy and are taxed twice at the pump – first with fuel duty and then with VAT, which is now charged at the standard rate of 20%, having increased from 15% in 1989.

While fuel duty has been frozen until at least September 2014¹⁰, if fuel prices increase, VAT will rise accordingly.

Vehicle Excise Duty
Vehicle Excise Duty (VED) or 'car tax' has been around since the earliest days of motor vehicles, with the UK's first tax schemes for 'light locomotives' introduced in 1896. In 1989, VED was £100¹¹ on a family car.

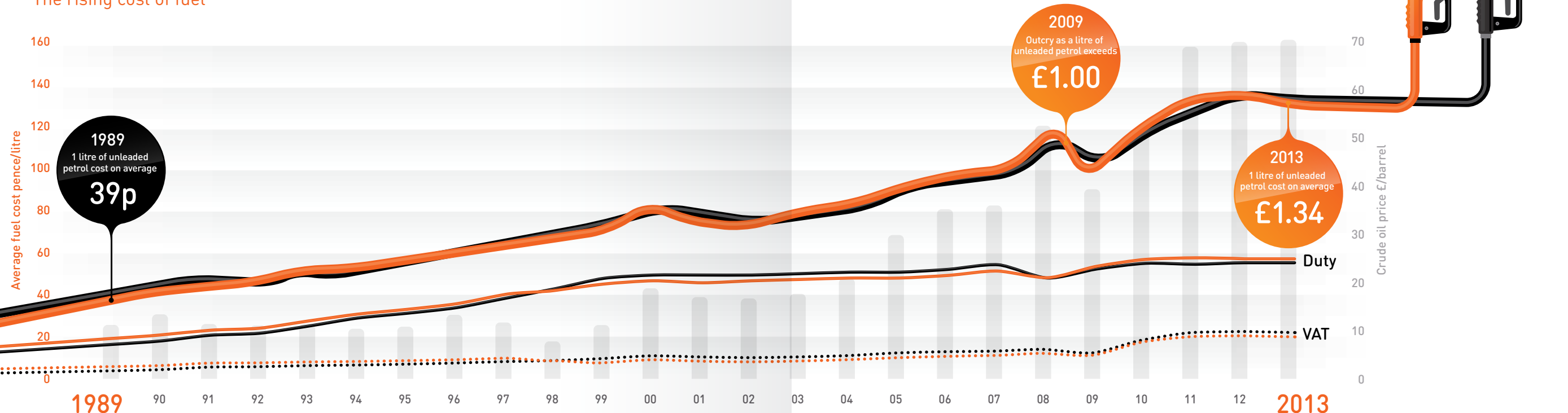
Today, the amount of VED is banded and depends on car engine size or official CO₂ emissions and the date of first registration. The more CO₂ a car emits, the greater the amount of VED payable.

For example, drivers with vehicles emitting between 226 and 255g/km of CO₂ can expect to pay £475 per year, while those driving cars with less than 100 CO₂ emissions pay no VED¹².

5. www.fuelpricesonline.com
6. Average prices on Wednesday 29 May 2013
7. HMRC Hydrocarbon Oils Statistical Bulletin
8. Office for National Statistics
9. Transport Statistics Great Britain: 2012
10. The Budget: 20 March 2013
11. House of Commons Library
12. Driver & Vehicle Licensing Agency, VED rates as of 1 April 2013

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

The rising cost of fuel



1.0 Celebrating 25 years of motoring

1.4 Number of licensed vehicles

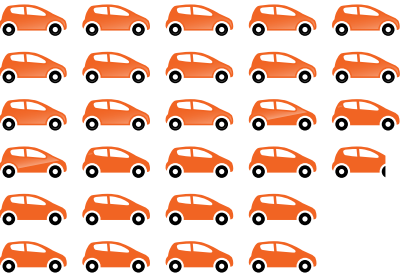
In 1989, there were 24.2m licensed vehicles on the roads. At the end of 2012 there were 34.5m vehicles licensed for use on the roads in the UK, of which 28.8m (83%) were cars¹³.

Since the recession of 2008-09 the annual growth in licensed vehicles has slowed but not stopped, increasing by an average of 0.5% per year since 2008, compared with an average of 2.4% a year between 1996 and 2007¹⁴.

Number of fully licensed drivers in the UK

1989

27.8 million



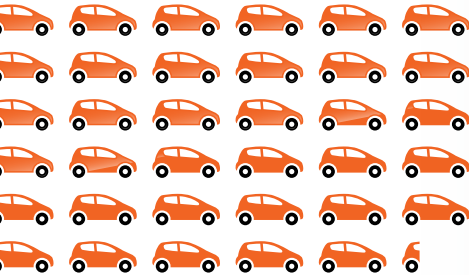
1.5 Number of driving licence holders

Today, there are 35.2m fully licensed drivers in the UK (72% of all people aged 17 or over) up from 31.4m in 2000. Of these, 18.9m are male drivers and 16.3m female drivers¹⁵. This represents a 27% growth in the total number of drivers since 1989 from 27.8m to 35.2m in 2013 and a significant increase in the number of female licence holders.

Between 1995 and 2010 the number of women holding a driving licence grew by 23% – a rise of 2.6m to 13.8m. Meanwhile, there has been a decrease in the number of young male driving licence holders; the number of men aged 20 to 29 holding a licence is down 0.3m (11%) to 2.4m¹⁶.

2013

35.2 million



13 & 14. Department for Transport, Vehicle Licensing Statistics, 11 April 2013

15. Department for Transport National Travel Survey 2011

16. RAC Foundation 'On the Move' report



1.0 Celebrating 25 years of motoring

1.6 Most popular car makes... then and now

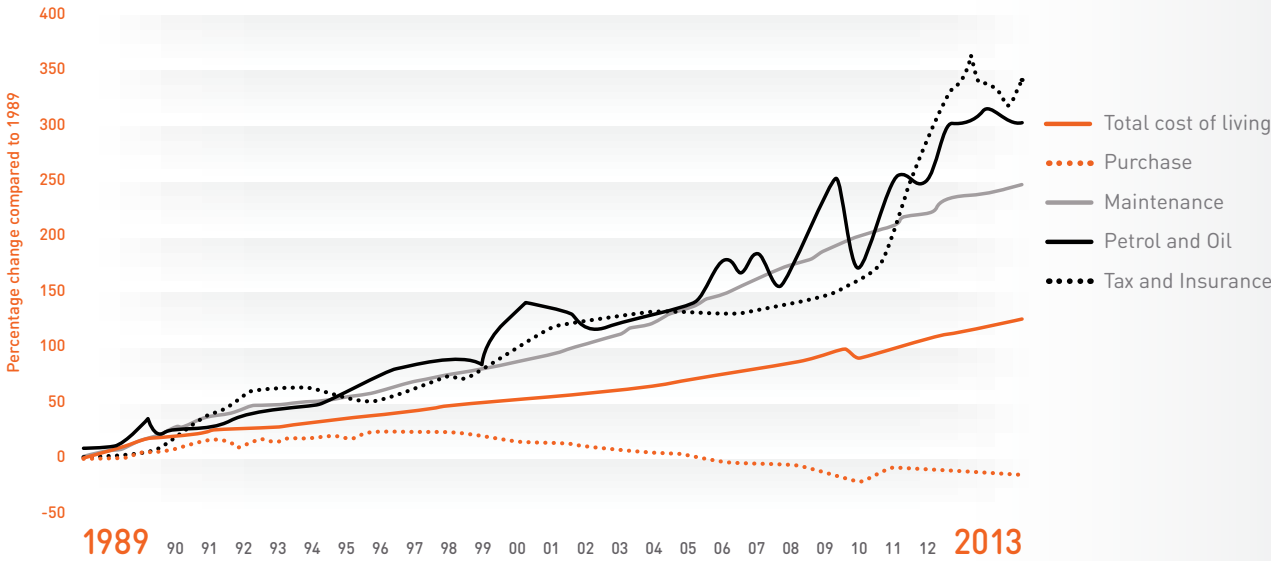
Over the past 25 years, the range of cars available has changed dramatically. In 1989, Ford monopolised the podium. The five best-selling cars were: Ford Escort; Ford Sierra; Ford Fiesta; Vauxhall Cavalier; and the Vauxhall Astra. Today, Ford still has pole position in the UK.

At the end of 2012, the most common car in Great Britain was the Ford Focus (1.4m) followed by

the Ford Fiesta (1.3m), a situation unchanged on the year before. In total, Ford accounted for 15% of all cars and Vauxhall for 12%.

The top five marques (Ford, Vauxhall, Volkswagen, Peugeot and Renault) accounted for 48% of all licensed cars in Great Britain. The next 10 (Toyota, BMW, Nissan, Citroën, Honda, Mercedes, Audi, Fiat, Rover and Volvo) take the total to over 81%¹⁷.

1.7 Cost of owning a car



This graph shows how motoring costs have changed since January 1989. It can be seen from this that there has been significant increases in certain day-to-day motoring costs (fuel 303%, tax and insurance 335% most notably). These are clearly outpacing the general increase in the cost of living (all items). However, the cost of buying a new vehicle has declined, costing less than it did in 1989.

17. Vehicle Licensing Statistics: 2012



1.0 Celebrating 25 years of motoring

1.8 Motoring Britain 2013 – moving up a gear or stalling?

The facts speak for themselves. Motoring Britain has changed considerably over the last 25 years. But how do motorists themselves feel about the differences between now and then? What are their perceptions of the changes in motoring since 1989 and is 'motoring Britain' a better place in 2013 or are we heading downhill?

The RAC Report on Motoring 2013 reveals that of those that had licences 25 years ago, nearly half (48%) of Britain's motorists enjoyed driving more than they do today, with only 7% stating that driving is more pleasurable now.

Looking at the perceived changes since 1989, by far the biggest concern is the increase in the cost of motoring, with six in 10 (61%) drivers really feeling the pinch.

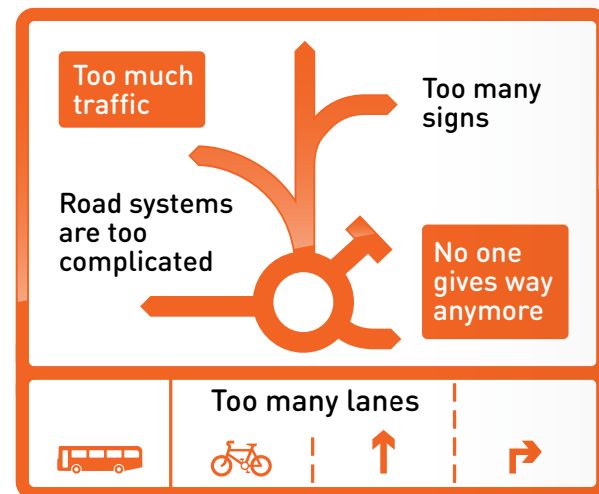
This is a particular issue for motorists living in the suburbs and rural areas – reflecting the lack of public transport alternatives to the car in many rural areas.

The behaviour of other drivers on the road today is also highlighted with over a quarter (28%) of motorists claiming driving is more aggressive than it was 25 years ago.

The sheer volume of traffic now on our roads compared to the late 1980s also shapes opinion. A quarter of drivers (22%) say increased congestion on motorways and in urban centres is a growing issue in Britain today. While a fifth of motorists (20%) believe the increase in traffic levels has made it harder than ever to find a parking spot.

"Road systems are too complicated now – there are too many signs and lanes, there is too much traffic and no one gives way anymore."

Female, aged 45 to 65 in South East England



"Roads are so busy and you can't park anywhere these days."

Female, aged 45 to 65 in East Midlands

"I like to drive but the state of the roads is atrocious – we should have a much better quality of road for the amount of taxes we pay."

Male, aged 45 to 65 in North-East England

 48%

Nearly half of Britain's motorists enjoyed driving more 25 years ago than they do today

 20%

A fifth of motorists believe the increase in traffic levels has made it harder than ever to find a parking spot

1.0 Celebrating 25 years of motoring

1.9 The car: love it or loathe it?

Against this somewhat negative backdrop, Brits continue to rely heavily on their cars. In fact, nine in 10 (89%) are more reliant on their cars today than they were 25 years ago and this is particularly the case with female drivers and those motorists aged 65 and over.

New and improved in-car technology has transformed the driving experience since 1989 and a third of motorists (33%) admit they have become more reliant on technologies such as sat-nav and parking sensors to assist them.

Indeed, 35% of motorists claim that they no longer use paper-based road maps to navigate their way around.



35%

of drivers don't use paper maps anymore



33%

of drivers have become more reliant on in-car technology e.g. sat-nav

Over a third of drivers (35%) acknowledge cars themselves have become safer as more in-car safety features are added and functionality like anti-lock braking and electronic stability control, once seen as 'bells and whistles', are now standard.

1.0 Celebrating 25 years of motoring

1.10 BACK TO THE FUTURE

Previous RAC Reports on Motoring enable us to travel back in time 25 years to learn what motorists in the late 1980s predicted for the future and to see the extent to which the face of motoring has changed in that time.

MOTORISTS' PREDICTIONS IN 1989

 **9%**

of motorists predicted that by 2001 most cars would run on electricity. Interest in electric vehicles (EVs) is growing but they still remain a niche market. A recent RAC Foundation report predicts that EVs and plug-in hybrids (PHEVs) are unlikely to reach mass production (defined as 100,000 units sold) until the early 2020s¹⁹

 **85%**

predicted all petrol cars would be required to use unleaded petrol. This has proved to be an accurate forecast – since 1993, all new UK petrol cars have been fitted with catalytic converters and can therefore only run on unleaded petrol

 **56%**

predicted cars would be banned from all town centres. Many town centres have introduced pedestrian-only areas – although some critics say this has contributed to the demise of high street shopping

 **7%**

thought that cars would be driven by computers and there would be no need for drivers. While futuristic pods without steering wheels are still the stuff of sci-fi films, the search giant Google and car manufacturers including Audi, Toyota, Ford, Mercedes and Volvo have been experimenting with driverless-car technology since 2005. A team of researchers at Oxford University have recently developed the UK's first driverless-car technology, 'Robot Car UK'²⁰

 **51%**

predicted most households in Britain would have at least two cars by 2001. Indeed, this has come true – in 1989, the number of households with two or more cars was around 4.5m, and in 2010 – the latest figure available – it had risen to 8.1m¹⁸

 **16%**

thought the speed limit on motorways would be raised to 100mph. There has been no increase in the speed limit on motorways, though the subject is once again under debate

What motorists back in 1989 could not have foreseen is the explosion in mobile communications, the internet and the mass-market use of Global Positioning Satellite Systems (GPS). These giant technological steps forward have transformed the motoring industry, changing the cars we drive and developing safety and navigational functionality that we could never have dreamed possible.

18. Department for Transport, National Travel Survey 2010
19. http://www.racfoundation.org/assets/rac_foundation/content/downloadables/powering_ahead_kay_et_al-apr2013.pdf
20. <http://www.independent.co.uk/life-style/motoring/features/robot-car-uk-set-to-rival-googles-driverlesscar-project-8523289.html>

1.0 Celebrating 25 years of motoring

1.11 Motoring then and now

Most motorists believe the UK is now at its peak in terms of car dependency. 89% say they are more reliant on cars today than in 1989 and, looking to the future, are more car dependent in 2013 than they will be in 25 years time.

A fifth of motorists (20%) predict the nation will be less dependent on their cars in 2038 versus today, while only 29% think car dependence will not change over the next 25 years.

Considering the Government’s involvement in motoring in the UK today, seven in 10 drivers (71%) agree the state is more intrusive in driving matters than in 1989. Common complaints from motorists include the increased use of speed cameras and higher motoring taxes.

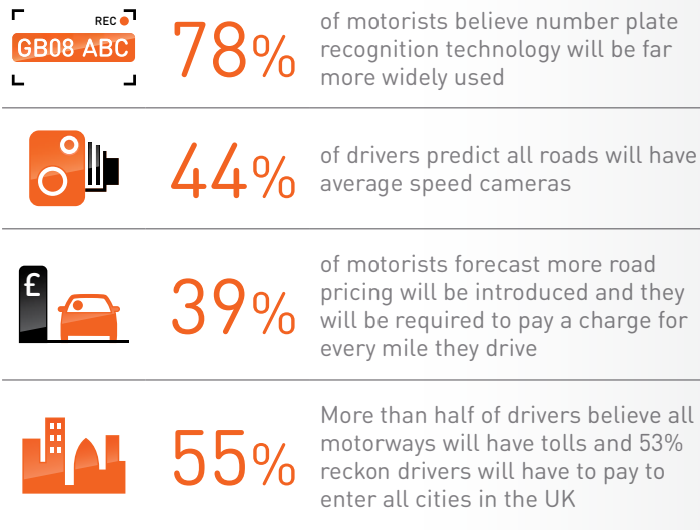
When it comes to environmental concerns, 76% of motorists think that compared to 25 years ago, drivers are, on the whole, more worried about the impact motoring has on the environment. And, even compared to five years ago, 55% of motorists are more concerned.

1.12 Crystal ball gazing

We asked motorists to think about how motoring will change in the next quarter of a century. Drivers overwhelmingly predicted technology will be the key influence on driving habits and will affect how transport policies are implemented and laws enforced.

If motorists’ predictions are correct, further congestion on our roads is on the cards with nearly half of drivers (45%) thinking that gridlocked roads will be the norm in 2038.

Motorists’ technology predictions for 2038:



“The Government are meddling too much, introducing tolls and congestion charges as well as far too many speed cameras that are implemented with absolutely nothing to do with slowing drivers down and more to do with making money. It’s immoral.”

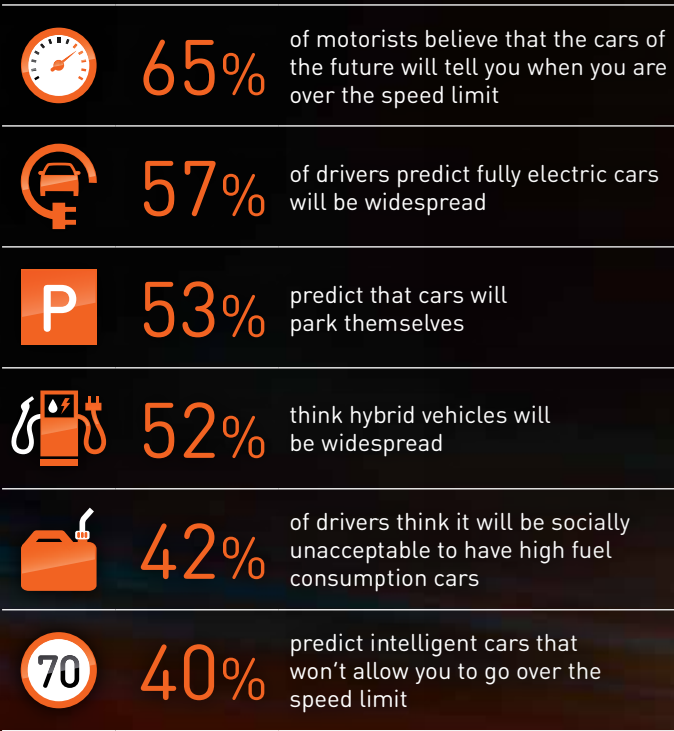
Female, aged 25 to 44,
drives an Audi A5,
based in Scotland

1.0 Celebrating 25 years of motoring

1.13 The cars of the future
We asked motorists to consider what cars will be like in 25 years' time. They predicted that new technologies will continue to transform cars.

Ground-breaking technological developments to enhance cars' safety features will prevent accidents and collisions happening in the first place and prevent drivers exceeding the speed limit. Drivers also widely predict the environment will continue to be a key consideration both for motorists and car manufacturers alike, with sustainable, green alternatives such as fully electric cars and hybrid vehicles becoming mainstream.

The list below summarises some of motorists' main predictions for 2038:



Only time will tell if drivers' predictions prove to be accurate. We will have to be patient and wait for the 2038 edition of the RAC Report on Motoring to see if they were right!



2.0 What's on motorists' minds today?

Money still tops the list of the main concerns for British motorists as they struggle to keep their cars filled up and on the road in the face of escalating costs. >

2.0 What's on motorists' minds today?

Motorists' pockets have never been hit so hard as fuel prices reach record highs and other motoring costs, such as insurance and taxes, have eaten up an ever-increasing share of household budgets.

2.1 Fuel prices

The cost of fuel is by far the biggest gripe for drivers in 2013 with 63% ranking it among their top five concerns, and over a third (36%) as their greatest concern, an increase of 6% on last year.

The 25 to 44-year-old age group is most affected by the cost of fuel with 40% ranking it number one on their list of motoring worries.

Unsurprisingly, it continues to be those living out of town who are hit hardest, 38% of motorists living in rural areas and also 38% of those in the suburbs, count the cost of fuel as the most pressing fear for them, against 28% of those living in cities or town centre locations.

20%

of 17 to 24-year-olds cite the prohibitive cost of insurance as their main motoring concern



2.2 Cost of insurance

The cost of insuring their car is also a worry for drivers in 2013 and is ranked fourth in the list of greatest concerns with a third (35%) apprehensive about the rising cost of premiums.

Of course, it is younger drivers who are hit the hardest when it comes to insuring their car and one in five (20%) 17 to 24-year-olds cite the prohibitive cost of insurance as their main motoring concern. And last year's EU Gender Directive, which forbids insurers using gender to set the price of car insurance premiums, has pushed up the cost of cover for some young drivers, particularly for young females who were seen as lower risk than their male counterparts.

Location also has a bearing on this picture with 13% of city or town dwellers putting insurance premiums as their biggest motoring concern compared to just 8% of those based in the country.

2.3 Behaviour of other drivers

Major concerns

Alongside the sheer cost involved with motoring in 2013, the behaviour of other drivers continues to be a major concern to motorists this year



Alcohol and drugs



39%

are apprehensive about other drivers on the road who may be under the influence of alcohol or drugs

Tax and Insurance



37%

worry about other people on the road that don't have tax or insurance

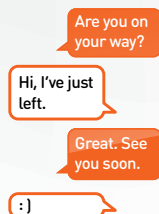
Mobile phones



33%

are anxious about other drivers talking on their mobile phones without using hands-free

Texting and websites



29%

are concerned about other people texting or accessing websites while they are driving

Traffic laws



21%

worry about other motorists breaking traffic laws



2.0 What's on motorists' minds today?

2.4 Condition of roads

The condition and maintenance of UK roads is also in the top three concerns this year.

A significant eight in 10 motorists (84%) believe the condition of their local roads is deteriorating, an increase of 15% from five years ago. And, three quarters of motorists (75%) have observed the condition of motorways and other main roads is getting noticeably worse, up 5% on 2010.

In rural areas, the quality of local roads appears to be getting much worse with nine in 10 (87%) drivers berating the poor condition of roads after successive harsh winters have increased the number and severity of potholes while local authorities' road budgets have shrunk.

Road maintenance has historically not been seen by politicians as a vote winner, but motorists regard this as the top priority in transport spending. As they already contribute over £40bn per year in motoring taxation, they are entitled to expect that roads should be maintained in a state that does not represent a risk to safety or put their vehicle at risk of damage to wheels, tyres and suspension.

2.5 Congestion

Nearly two thirds of motorists (65%) think roads are more congested than a year ago. Not surprisingly, there are regional variations with some 68% of drivers in the South East and 71% of drivers in Yorkshire and Humberside claiming to have noticed more congestion. This is despite the latest Department for Transport statistics which reported a small decrease in traffic levels of 0.4% between 2011 and 2012²¹.

 **84%**

of motorists believe the condition of their local roads is deteriorating, an increase of 15% from five years ago

 **65%**

of motorists think roads are more congested than a year ago



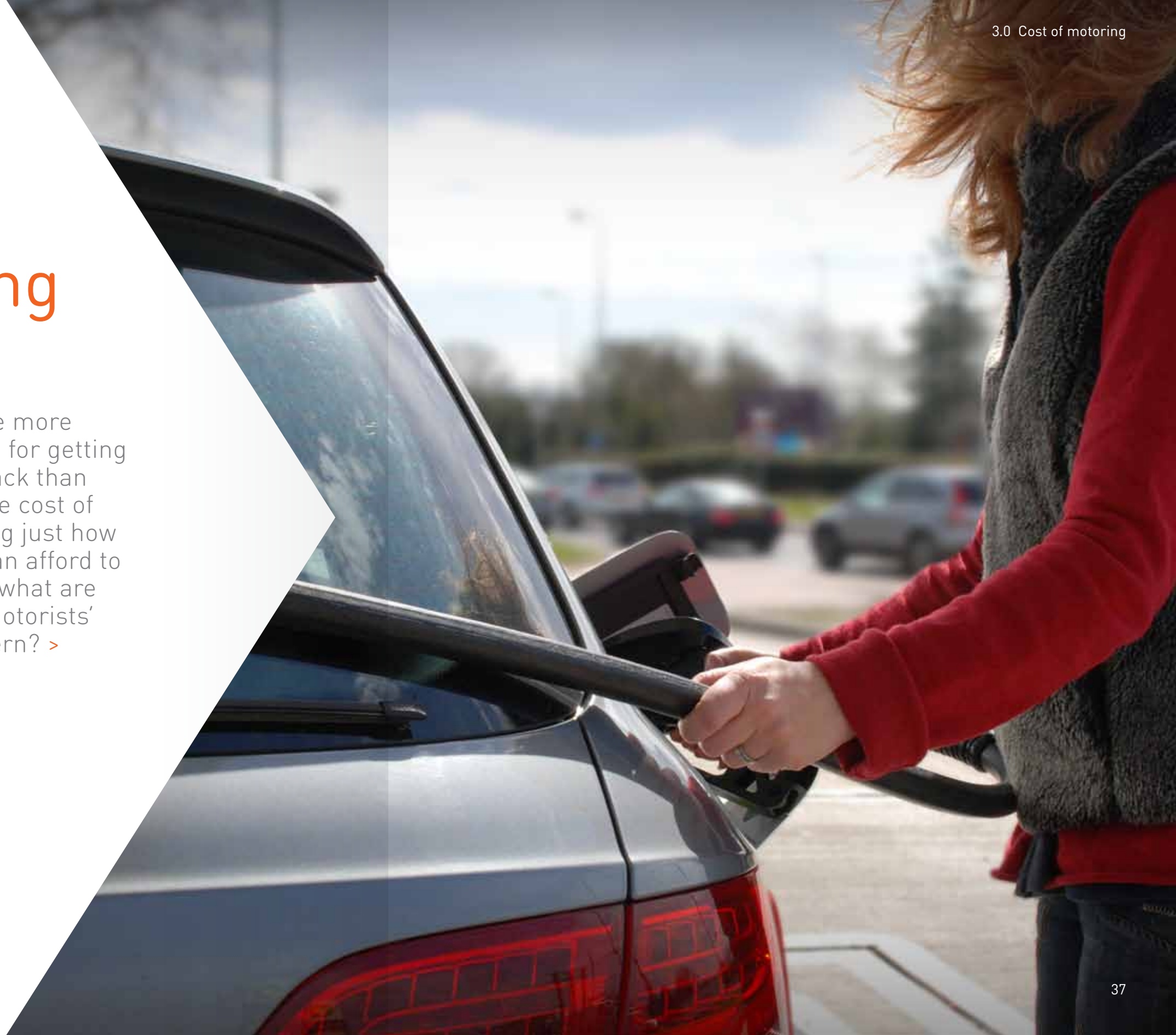
"The huge backlog of road repair work is unacceptable. A proactive programme to fix potholes properly once and for all will help kick start the economy by providing work for local businesses, improve conditions for drivers, cyclists and pedestrians and significantly reduce safety risks. We are urging the Government to create a ring-fenced 'Road Repair and Renewal Fund' for crucial road repairs before the situation gets even worse."

Stephen Joseph
Chief Executive
Campaign for Better Transport

21. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/82798/road-traffic-estimates-quarter-4-2012.pdf

3.0 Cost of motoring

As a nation, we are more reliant on our cars for getting from A to B and back than ever before, but the cost of motoring is limiting just how much motorists can afford to use their cars. So what are the facts behind motorists' number one concern? >





3.0 Cost of motoring

While the price of fuel at the pump varies almost on a daily basis, as wholesale prices move in line with supply and demand, world oil price fluctuations and exchange rates, the price of petrol has risen 16% and the price of diesel 19% over the past three years²². And, this is having an adverse effect on 77% of drivers who say they are struggling to make ends meet in the face of escalating costs.

Rising insurance premiums are also having a negative impact, with more than half of British drivers (56%) being particularly affected by increasing insurance costs. The cost of repair and maintenance is also hitting motorists where it

hurts – 50% of drivers complain the expense of running their car is putting a severe dent in their finances.

Research²³ by the RAC Foundation has revealed that the impact of high motoring costs is having a devastating effect on the poorest 10% of car-owning households, putting them in 'motoring poverty'. Approximately 800,000 car-owning households are spending at least 27% of their disposable income on buying and running a car and, of a total maximum weekly expenditure of £167, £44 goes to vehicle-related expenses such as fuel, insurance, tax and repair and maintenance costs.



The RAC has teamed up with FairFuelUK to lobby for a fairer system of taxing motorists.

Over the last 24 months we have succeeded in persuading the Government to scrap six planned duty increases, saving motorists over 13 pence a litre on fuel – that's over £6.5bn per year.

We have consistently highlighted the impact of high fuel prices on drivers and their social lives and persuaded the Government to recognise that by sensibly

controlling fuel duty, it can be a growth stimulus for business and the economy not just a 'cash cow' for the Treasury. We are calling for transparency – all fuel VAT receipts to show the duty as well, so motorists can see that 60% of the price is tax.

For more information and to register your support visit www.fairfueluk.com



"Motoring is the single biggest area of household expenditure bar none. Those on the lowest incomes are drowning under the weight of motoring costs."

The Government's recent freeze on fuel duty, while welcome, is like rearranging the deck chairs on the Titanic – ultimately futile. To make a real, meaningful difference, fuel duty needs to be cut significantly."

Professor Stephen Glaister
Director
RAC Foundation

 **77%**

of drivers say they are struggling to make ends meet in the face of escalating fuel costs



22. RAC Foundation
March 2013
23. Department of Energy and Climate Change
Quarterly Energy Prices
December 2012 – percentage increase of petrol and diesel prices from 2010 to 2012

3.0 Cost of motoring

3.1 Social impact

The cost of motoring is continuing to have far-reaching social implications for drivers throughout the UK. More than half of British motorists (54%) say they would have a fuller social life and would visit family and friends more if fuel was more affordable, rising to 77% for 17 to 24-year-olds.

Such is the extent of the issue that over two thirds of C2DE drivers (67%), 71% of drivers aged 17 to 24 and 64% aged over 65, believe motoring may actually become a rare luxury for them if the cost of driving continues to escalate. One in five (20%) drivers in rural areas think this emphasises how essential the car is for them to live a normal life.

Some 16% have already given up elements of their social life due to the rising cost of motoring, a 5% increase on last year. This has far-reaching social impacts for families who run the risk of becoming increasingly isolated as they can no longer afford to visit friends and loved-ones or attend social gatherings. 10% have been forced to stop using the car for general day-to-day getting around and 9% have had to sacrifice family commitments.

Over a quarter (26%) believe they will have to consider giving up elements of their social life if the cost of motoring continues to rise while 26% would have to bring to a halt daily car travel due to escalating costs and 21% would actually have to sacrifice family commitments such as visiting family members and helping transport elderly relatives.

3.2 Vehicle dependency: car-free = carefree?

Motorists are generally driving less than they used to, largely for economic reasons. However, that does not mean to say they are less reliant on their cars. Drivers continue to see the car as an integral part of their lives, with more than three quarters (78%) admitting they would find it very difficult to adjust to a car-free lifestyle.

However, motorists seem to be stuck between a rock and a hard place – on the one hand they are being squeezed financially, but on the other they feel the public transportation system just isn't up to scratch and doesn't meet all of their travel needs.



Unsurprisingly, city dwellers are more likely to consider using public transport than their suburban or rural counterparts, simply because they have a wider range of public transport options available to them.

Younger drivers aged 17 to 24 are more likely to be open-minded and flexible about using public transport to get around – over a fifth (21%) disagree it would be difficult to adjust to life without a car compared to only 11% of all motorists.



of drivers aged 17 to 24 believe motoring may actually become a rare luxury for them if the cost of driving continues to escalate



of drivers have already given up elements of their social life due to the rising cost of motoring

3.0 Cost of motoring

3.3 Going green

Motorists are becoming more aware of environmental issues and eight in 10 drivers now claim they are more likely to consider environmental impact when they next buy a car.

This is particularly the case for female drivers (82%), motorists aged 17 to 24 and 45 to 64 (83%) and ABC1 drivers (82%).




The majority of motorists have reduced the number of car journeys they make and combined trips wherever possible, although the main reason for this is for financial rather than environmental concerns. We are some way off drivers making more radical behavioural changes such as buying alternatively powered hybrids or pure electric vehicles.

Just 17% have considered this option so far and this is unlikely to change for some time to come because of the price of alternatively powered vehicles, the range limitations of pure electric vehicles and the continuing improvement in fuel efficiency of conventional vehicles.

17%

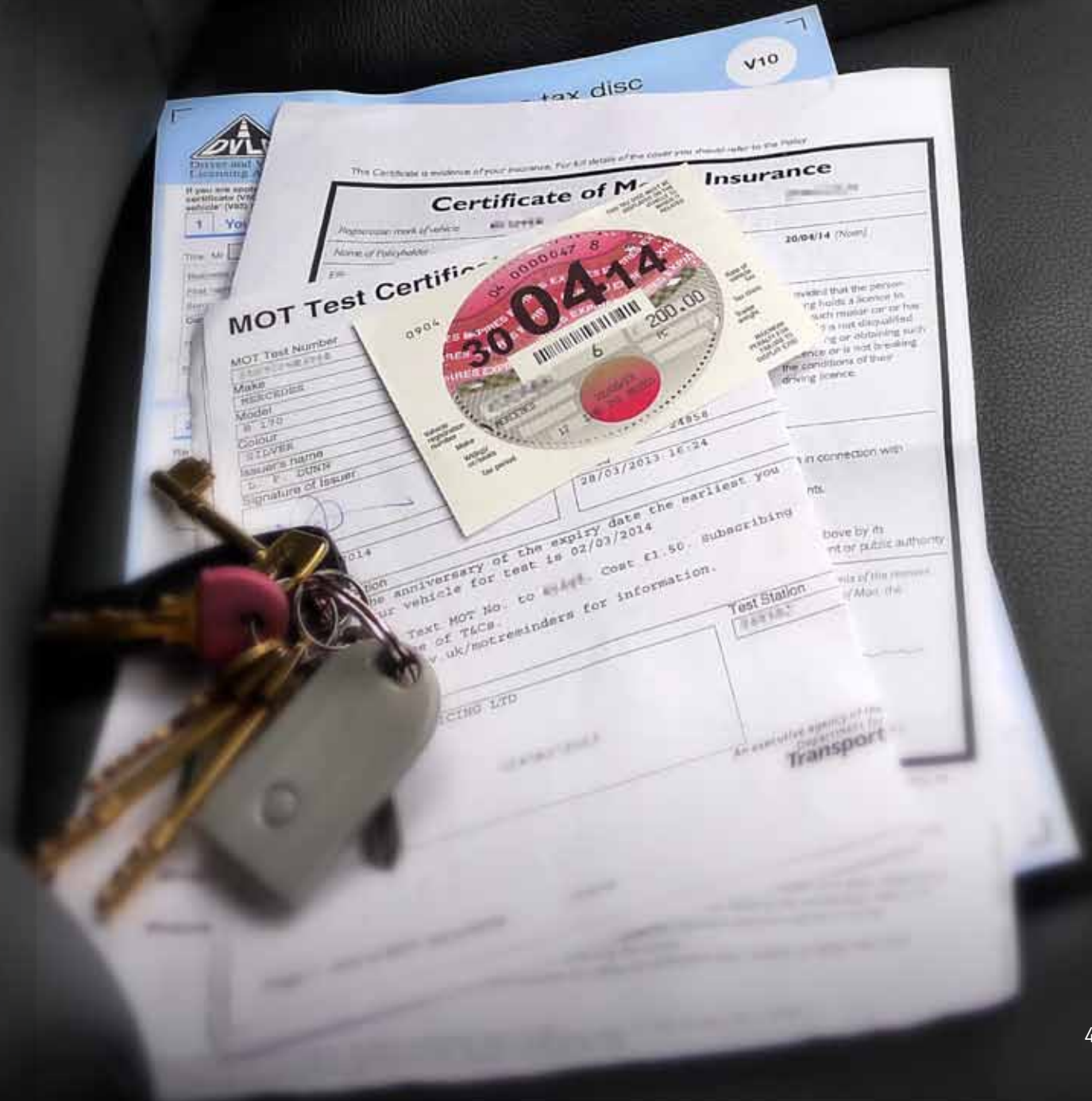
have considered buying alternatively powered hybrids or pure electric vehicles

Walking is the most popular alternative to driving:

	27%	choose to make a journey on foot every day or most days
	30%	of people chose to walk one to three times a week
	80%	of drivers now claim they are more likely to consider environmental impact when they next buy a car

4.0 Motoring taxation

It has been said there are only two certainties in life – death and taxes. But when it comes to motoring taxation, it would seem that a number of Britain's motorists aren't all that clear on how the system works. >



4.0 Motoring taxation

One in five (19%) does not understand the different elements that make up motoring taxation and just one in 10 drivers are both aware of, and happy with, the current balance of motoring taxes.

In fact, a significant proportion (49%) are unhappy with the current mix of motoring taxation and this rises to 56% of male drivers and 42% women. Instead, almost half of motorists (47%) believe the high taxes levied are there to deter them from using their car and just 17% think the current level of motoring taxes is a fair price for their motoring freedom.

Motorists are also dissatisfied with how the funds raised through motoring taxation are used. For example, over three quarters of drivers (78%) don't believe the taxes they pay are sufficiently reinvested into improving local roads.



Over three quarters of drivers don't believe the taxes they pay are sufficiently reinvested into improving local roads.



One in five does not understand the different elements that make up motoring taxation

These views confirm, not surprisingly, that motoring taxation is a somewhat contentious issue among drivers and there is growing concern regarding how fair (or otherwise) the system is and how money raised through taxation should be spent. Almost a third of drivers (31%) would support the introduction of more toll roads in return for a reduction in current motoring taxes, though this percentage has dropped from 38% of motorists last year.



Almost a third of drivers would support the introduction of more toll roads in return for a reduction in current motoring taxes



4.0 Motoring taxation

4.1 Getting the balance right

So, what exactly should the balance of motoring taxation look like?

It is clear motorists want tax levied on fuel and Vehicle Excise Duty ('car tax') to represent a smaller share of what they pay. Over three quarters (77%) would prefer to pay less fuel tax and half (49%) would like to pay lower levels of car tax.

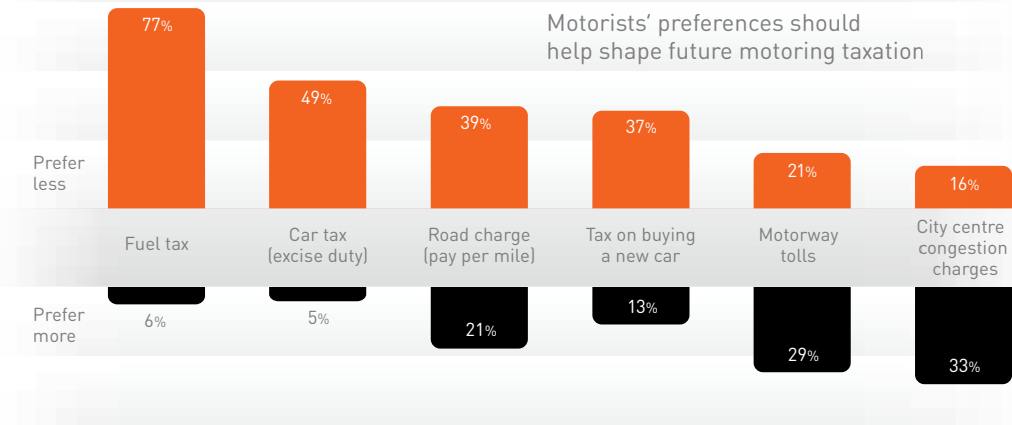
Instead, a significant number of motorists are in favour of replacing these with charges for use of motorways and access to city centres – 29% of drivers would support more motorway tolls, with only 21% opposed to this and a third (33%) would support more city centre congestion charges with only 16% opposing this.

And, when it comes to charging for the use of roads, six in 10 drivers (60%) are in favour of higher charges for those with the most polluting vehicles. Four in 10 (41%) believe such charges should be higher for those roads with the greatest congestion levels while 35% would accept 'pay per mile road charges' on motorways potentially on new trunk roads.

This suggests that motorists would prefer to see a higher share of motoring taxation levied on those things over which they have greater control – such as whether or not they choose to drive into city centres or use particular motorways.

Changing the balance of motoring taxes²⁴

Motorists' preferences should help shape future motoring taxation



"Tax is always going to be something of a 'hot potato' where motorists are concerned.

Investment is needed in our roads and transport infrastructure, that is a given, but the Government faces a dilemma as to how to restructure an ageing motoring taxation system we've lived with for many decades which is currently based on carbon emissions. This is at a time when cars are increasingly fuel efficient and we are on the cusp of alternatively powered vehicles becoming more widespread."

David Leibling
Transport and Motoring Consultant



4.0 Motoring taxation

4.2 Transport investment: setting out the priorities

Motorists are unequivocal – the top priority for spending the money raised through motoring taxation should be the maintenance and improvement of Britain’s roads.

Several successive harsh winters have taken their toll on the UK’s road network and the latest research bears this out – the number of potholes filled over the last year has risen to 2.2m, an increase of 29% on the

previous year, costing councils £113m in repair costs and over £13m in compensation claims²⁴.

As with previous years, motorists’ priorities differ depending on the type of driving they are more likely to do. For example, company car drivers and people living in rural areas give greater priority than urban motorists to maintaining motorways while suburban drivers strongly advocate more maintenance and improvement of local roads.

It would appear British motorists are not short of ideas on how money raised from motoring taxes should be used to improve the transport infrastructure.

Four in 10 (39%) would like to see local rail services improved and almost a quarter (24%) demand better provision for cyclists, reflecting the fact that motorists don’t just exclusively rely on their cars to get around – they use buses and trains, and many are cyclists.

What is clear is that motorists have little appetite for expensive, grandiose schemes; just 15% of motorists see HS2, the proposed high speed rail network as a transport investment priority and even fewer favour further expansion of airport capacity.



“The condition of our roads is a huge concern for local residents.

Our evidence shows that people want the Government to focus on getting the basics right and that means improving and maintaining the roads that they use day in, day out. While local authorities have, understandably, had to bear the brunt of the Government’s swingeing spending cuts, there has been a disproportionate reduction in road maintenance spend – this is quite wrong and in our view, unjustifiable.”

Simon Best
Chief Executive, Institute of Advanced Motorists

Overall, the top three priorities for British motorists are:



potholes were filled on the UK’s road network over the last year



of people demand better provision for cyclists

24. ALARM Survey 2013

5.0 Safety and behaviour

Most motorists agree that overall driving standards have slipped in the last five years with two thirds (65%) believing that anti-social behaviour, including road rage, is actually becoming more common and 62% think the courtesy of other drivers has gone downhill. >



5.0 Safety and behaviour

More than half (56%) have noticed a discernible slip in drivers' compliance with motoring laws while some 46% believe car crime, including vandalism and theft, has worsened in the last five years (although crime statistics would suggest otherwise).

On the positive side, over a third (35%) of motorists agree that increasingly sophisticated in-car technology over the past few years has made people safer drivers, rising to 42% of high mileage drivers and 39% of city or town dwellers.

 **46%**

believe car crime, including vandalism and theft, has worsened in the last five years



"There is no doubt that technology plays a major part in making driving...

... safer and easier than ever before, allowing car owners to be more informed about their vehicle, occupants and journey. Vehicle manufacturers have been, and will continue to be, at the forefront of global innovation in safety technology, which is something we can be rightly proud of.

Keith Lewis
SMMT Head of Communications



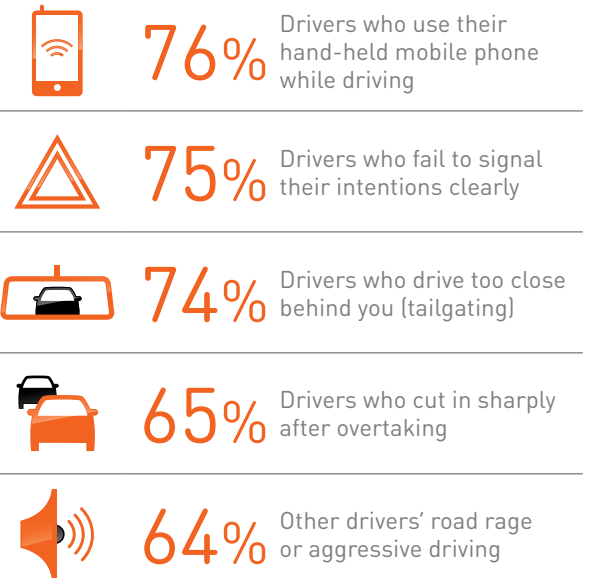

5.1 Driving stress

Looking at what makes motorists stressed or angry when they are behind the wheel, it is the behaviour of other drivers that seems to have the greatest impact. Interestingly, five years ago, other drivers using hand-held mobile phones was tied in second place as the most stress-inducing behaviour – today, it is the number one source of frustration and anxiety for motorists.

This certainly begs the question:

- Have driving standards really slipped so much in the past few years?
- Are drivers angrier, more aggressive and ruder in 2013?
- Are things really as bad as people think, or are drivers' perception versus reality two different things?

Top five 'causes of stress' for motorists

"There are those unwritten codes of driving behaviour that, from my personal observation of over 30 years' driving, people are getting better at...

... switching their lights on when it's raining, changing lanes to let other drivers on to the motorway, showing thanks when someone gives way to them and giving way to pedestrians crossing the road. These simple, every day actions demonstrate most motorists' common sense, decency and general courtesy towards other road users."

Nick Starling
Director of General Insurance, Association of British Insurers

5.0 Safety and behaviour

5.2 Feeling safe and sound?

Technology is widely acknowledged to have improved road safety. The majority of motorists (86%) recognise that cars are safer today than they used to be and nearly two thirds of drivers (63%) believe in-car technology makes them feel safer than ever before.

Despite the small increase in fatalities in 2011, Britain's roads themselves are unquestionably safer than ever before. Over the last 25 years, the number of people killed or seriously injured on our roads has fallen from 63,000 per year in 1989 to just over 25,000 per year now.

Over the same period, annual road casualties (killed, serious casualties and slight injuries) have decreased from 342,000 (including 63,000 serious injuries) to just over 200,000 (including 25,023 serious casualties)^{25/26}.

 **86%**

The majority of motorists recognise that cars are safer today than they used to be

Despite the fact almost half of motorists (48%) think the authorities are not as interested in road safety as they used to be and 36% believe the management of roads and traffic has deteriorated over the years, more than a third (37%) agree the roads are safer today than before, rising to almost half (49%) of high mileage drivers.

However, just one fifth (19%) of motorists believe driving standards are better today than they used to be, again reflecting that it is other drivers' behaviour that is the main source of stress for motorists today. On a more positive note, four in 10 (39%) think drivers are generally more safety conscious today than ever before.

Annual road casualties

1989

342,000

including 63,000 killed or seriously injured

2011

200,000

including 25,023 killed or seriously injured

5.3 Impact of technology

In-car technology has undoubtedly made motoring safer and easier. Features such as airbags and anti-lock braking systems have made 72% of motorists feel safer and eight out of 10 drivers (81%) credit parking sensors with making life easier.

However, motorists' views on some technologies, such as sat-navs and electronic handbrakes, are more polarised – almost a quarter (23%) believe sat-navs have made driving less safe, while 30% think they have made driving more safe. The jury appears to be out on electronic handbrakes too, with 22% saying they make driving safer, and 14% disagreeing.

Backseat DVD players come in for criticism with four in 10 motorists (41%) arguing they have made driving less safe. However, those who think this may be forgetting just how much more of a distraction the kids would be without the DVD!

 **23%**

of motorists believe sat-navs have made driving less safe

25. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/9066/reported-road-casualties-in-great-britain-main-results-2011.pdf

26. http://www.apccs.police.uk/fileUploads/APCC_Group_Emails/Road_accident_statistics.pdf

5.0 Safety and behaviour

5.4 Driving distractions

Touchscreens, integrated smart phones, music players connected via USB ports, built-in hard drives, and social media – are all available in today’s cars. While many of these technologies provide motorists with useful functionality, there are real concerns about how much their use distracts drivers from concentrating on the road ahead.

According to new Which? research, more than seven in 10 drivers find interacting with these systems distracts them from driving²⁷.

Indeed, distraction caused by in-car technology is currently under close scrutiny in the USA. American transport officials are considering voluntary guidelines to limit driver distraction from integrated electronic devices, including mobile phones. In 2010, US figures suggested that ‘distraction by a device or control integral to the vehicle’ was reported in 26,000 crashes²⁸.

However, new technology also continues to give cause for concern. Nearly a quarter of motorists (24%) admit they have adjusted or programmed their sat-nav when driving, an increase of 2% on last year.

Here in the UK, motorists tell us their three greatest distractions are still the activities that have been there for the last 100 years.

Three greatest distractions:

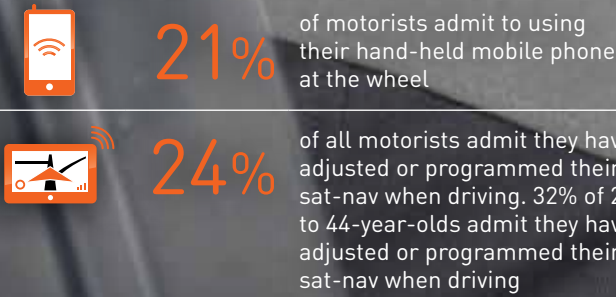
- Talking to passengers (89%)
- Adjusting car controls (80%)
- Eating or drinking (49%)

Company car drivers are the worst culprits – 78% admit to fiddling with their sat-nav while driving, compared to 45% of private car owners.

Although it is against the law to use handheld mobile phones at the wheel, over a fifth (21%) of motorists admit to having done so in the past 12 months. 25 to 44-year-olds are the worst offenders with 30% admitting they have while only 12% aged 65 and over (up 3% on 2012) say they have.

This figure is unchanged from last year – suggesting too many motorists regard using a handheld mobile phone while driving as socially acceptable. It also suggests that current penalties are an insufficient deterrent when compared to the likelihood of being caught.

Distractions of new technology



27. <http://www.which.co.uk/cars/driving/sat-navs-and-car-accessories/in-car-technology/in-car-tech-tested/>
28. <http://www.bbc.co.uk/news/technology-17073764>



5.0 Safety and behaviour

5.5 Compliance: the need for speed?

From what they tell us, drivers' speed limit compliance has improved over recent years, in part due to motorists driving slower to conserve fuel.

This is supported by official figures showing there is a greater level of compliance when it comes to drivers obeying speed limits. Looking at fixed penalty notices (FPN), there were 1.5m FPNs for motoring offences issued by the police in 2011, a decrease of 18% on 2010. Just over half of FPNs in 2011 were for speeding offences and speed infringements saw the largest decrease in numerical terms – down by 208,112 offences²⁹.

However, research for this year's report shows compliance has plateaued. The poorest adherence of speed limits still occurs on motorways. Nearly two thirds of motorists (65%) admit to breaking the 70mph speed limit, compared to 63% in 2012. And, this is against a background of a massive 92% who consider themselves to be law-abiding drivers, up from 83% in 2008.

Just one fifth (20%) of motorists say the speed limit should never be broken on motorways, compared to 51% who state the speed limit should never be broken in towns, once again showing that for many motorists the 70mph limit on motorways lacks credibility.

While research in previous years suggests the majority of motorists support raising the speed limit on motorways to 80mph, the Government's plans to implement an 80mph trial on some stretches of motorway appears to have stalled.



of motorists admit to breaking the 70mph speed limit



consider themselves to be law-abiding drivers



29. <https://www.gov.uk/government/publications/police-powers-and-procedures-in-england-and-wales-201112/police-powers-and-procedures-in-england-and-wales-2011-12#fixed-penalty-notice>



5.0 Safety and behaviour

5.6 '20's plenty'?

While speed limit compliance in 20mph urban zones is slightly better than in 30mph areas – 36% of motorists still admit to speeding in them. It appears that because most 20mph zones are confined to local areas where the safety risk is high, such as adjacent to schools, playgrounds and accident blackspots, motorists generally understand and accept them. However, there is a risk that non-adherence will rise if 20mph zones are applied more widely in urban areas where the dangers are less obvious.

There has been a wider use of 20mph zones in recent years, with many big cities across the UK including Bristol, Liverpool, London, Manchester and Newcastle introducing them.

However, the experience in Portsmouth suggests more research is needed to assess the impact of 20mph zones. Portsmouth City Council was the first local authority in England to implement an extensive area-wide 20mph speed limit scheme covering most of its residential roads.

Analysis carried out on behalf of the Department for Transport found that prior to the speed reductions, an average of 18.7 people per year were killed or seriously injured and this rose to 19.9 people per year after the implementation of the blanket 20mph limits. And motorists' average speeds were reduced by only 1.3mph to 18.5mph³⁰. While this represents an increase it may not be appropriate to draw firm conclusions on the effectiveness of the widespread use of 20mph speed limits on this experience alone.



There is a risk that adherence will fail if 20mph zones are applied more widely



"No sound conclusions can be drawn on the basis

of Portsmouth's 20mph limits alone. Unfortunately, at this time, there is no specific national information on where all 20mph zones and limits are located. Therefore evaluating the changing relationship between accident rates, travel behaviour, wider health impacts and 20mph zones is challenging."

Daryl Lloyd

Head of Road Safety Statistics,
Department for Transport

30. <http://assets.dft.gov.uk/publications/speed-limits-portsmouth/speed-limits-portsmouth.pdf>

5.0 Safety and behaviour

5.7 Crime

Three in 10 motorists say their car has been broken into in the past, but the vast majority of drivers now take precautions against car crime by always locking windows and doors. Cars are better protected against theft today, with features such as car alarms and immobilisers being the norm. As a result, car crime is falling and vehicle-related theft has decreased considerably over recent years.

Estimates of vehicle-related theft for the year ending September 2012 showed a statistically significant decrease of 11% compared with the previous year. The latest estimate indicates that there were around 1.1m vehicle-related thefts in England and Wales, compared with around 1.2m in the previous year³¹.

Over the longer term, the Crime Survey for England and Wales reports a consistently downward trend in vehicle-related theft, with the latest estimates being 34% lower than those reported in the 2006/07 survey, and 56% lower than in 2001/02. This has surprised many crime experts, as crime levels would normally rise in periods of economic uncertainty³².

More than a quarter of motorists (26%) have had their car vandalised at some time in the past, with 13% claiming to have suffered in the last six years and 3% during the last 12 months. The problem is worse for drivers of top-end cars such as luxury/executive or sports cars, with 17% of drivers reporting vandalism in the last six years. These percentages seem high against the fall in reported car crime suggesting some vandalism may go unreported to the police and the problem could therefore be greater than is apparent from reported figures.



of motorists have had their car vandalised at some time in the past



of luxury/executive or sports car drivers have reported vandalism in the last six years

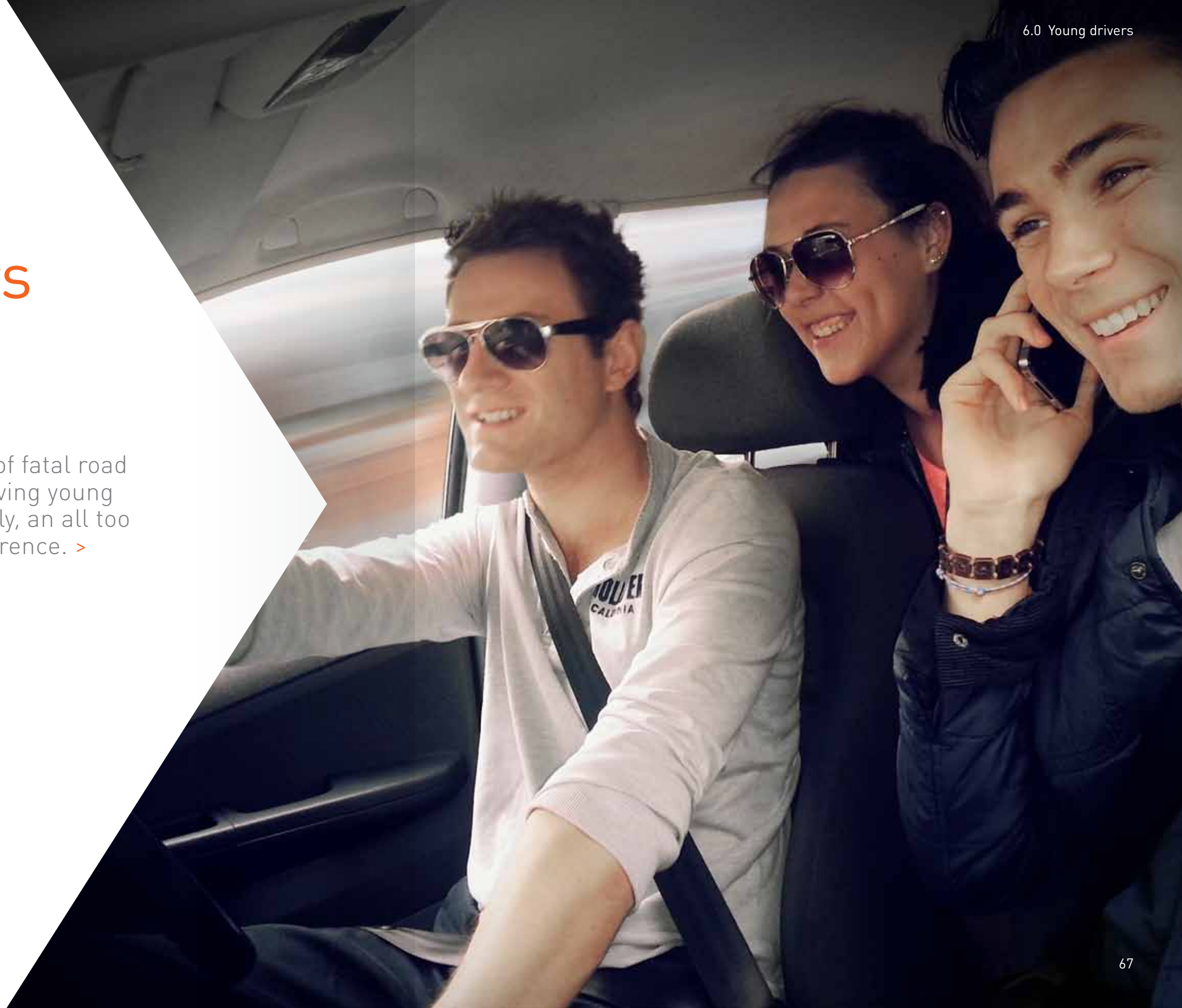
31. <http://www.ons.gov.uk/ons/rel/crime-stats/crime-statistics/period-ending-sept-2012/stb-crime-in-england-and-wales--year-ending-sept-2012.html#tab-Key-points>

32. <http://www.bbc.co.uk/news/magazine-21041160>



6.0 Young drivers

Media reports of fatal road accidents involving young drivers are sadly, an all too common occurrence. >



6.0 Young drivers

There is a wealth of statistics available which show that young drivers, and in particular, young male drivers, are at a much higher risk of being involved in a serious accident than their older counterparts. Sadly, their friends travelling as passengers are also therefore more likely to be killed or seriously injured.

Road accidents are now the biggest single killer of young people, both in the UK and worldwide³³. An 18-year-old driver is more than three times as likely to be involved in a crash as a 48-year-old³⁴.

These statistics tell a poignant and thought-provoking story. It raises the question as to whether we can do more to educate our young, both about safe and courteous driving and the dangers of excess speed, drink and drug driving while they are in the education system.

However, there is little enthusiasm for additional lessons or supervised practice. 38% felt this was not necessary, possibly due to the high associated cost of lessons rather than the underlying need. Females are more likely to see a requirement – twice as many women would have liked more supervised driving practice than men. Overall, 42% of young drivers do not feel they need additional driving tuition once they've passed their test.

Many young drivers are daunted by the prospect of driving on the motorway once they've actually passed their test. Although there is little evidence to suggest that inexperienced drivers on motorways cause accidents, a disproportionate number of accidents involving young drivers take place at night on country roads.

 25%

of young drivers feel they need additional driving tuition once they've passed their test

33. Death registrations in England Wales (ONS, 2010)

34. Reported Road Accidents Involving Young Drivers 2009 (Department for Transport, 2011)



"Young drivers are telling us they want more support and learning to equip them with the skills required to drive with confidence on Britain's roads. They would welcome supervised learning on motorways and agree that lessons on safer driving should be taught in our schools. We as an industry need to listen to them and act accordingly."

David Bizley
Technical Director, RAC

6.0 Young drivers

When it comes to their views on driving, young motorists have fairly polarised views, both on learning to drive and on how well this equips them to drive on today's roads.

We asked young motorists aged 17 to 24, how they felt about their driving test and whether it adequately equipped them for modern driving. We also wanted to find out how young drivers felt immediately after passing their test – did they feel confident in their driving ability?

6.1 Viewpoint: young drivers' perspectives



agreed the standard driving test does not cover all of the skills required to cope with the demands of driving today. However, a sizeable 28% disagreed with this



say they would have liked supervised driving practice on the motorway as part of learning to drive



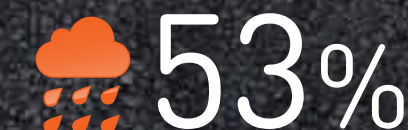
admitted they did not feel confident having passed their driving test



came out of their test feeling positive about their abilities. Indeed, perhaps understandably, young women are less likely to feel confident than young men



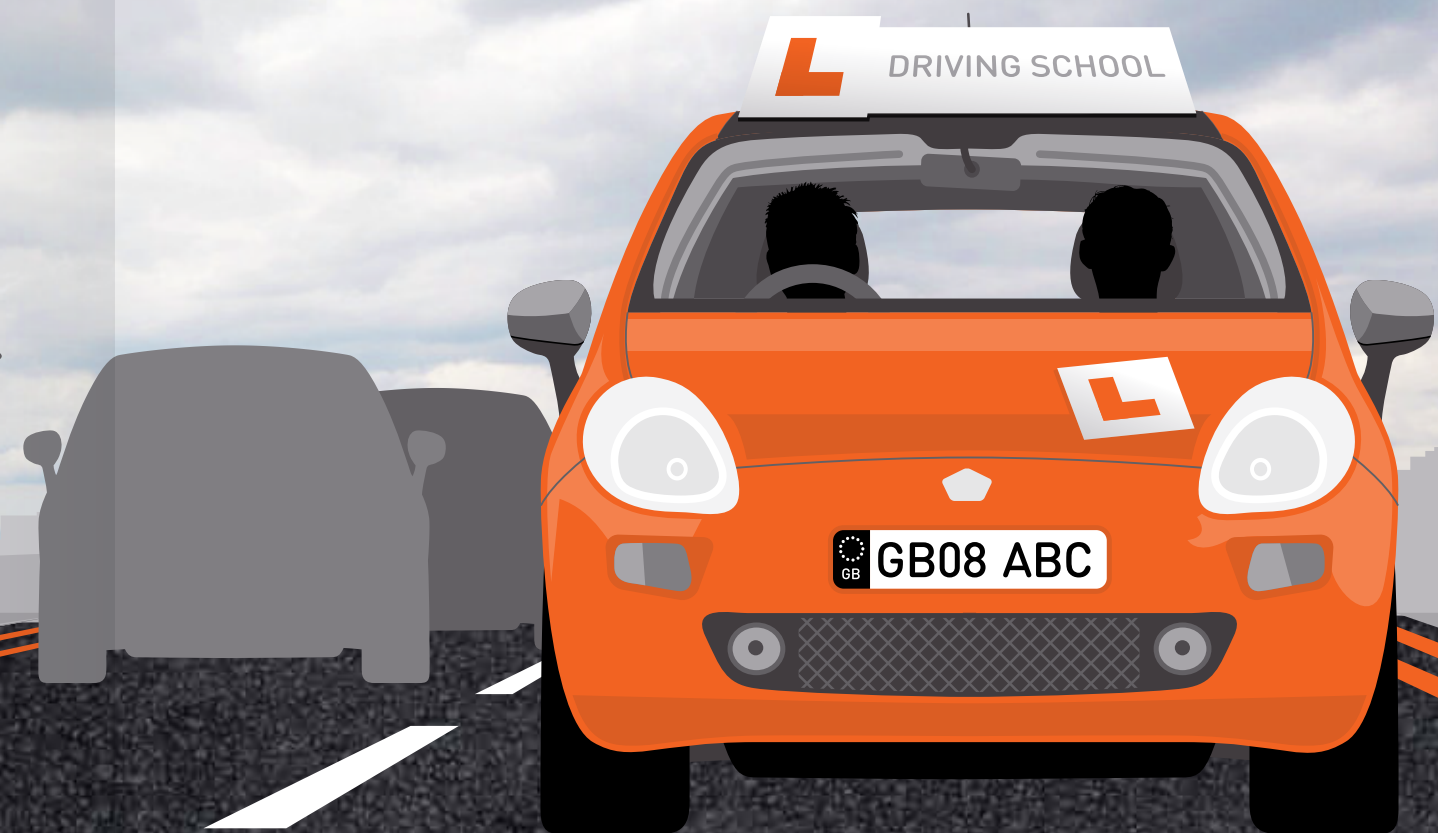
of young drivers agree they would have liked to learn more about safe driving while still at school



admit they are sometimes nervous about driving in adverse weather conditions



state they are sometimes nervous about driving at night



6.0 Young drivers

6.2 Viewpoint: parents' perspectives

Safety measures

Parents who drive were asked what measures should be taken to protect younger drivers and improve the overall safety record of 17 to 24-year-olds



Motorway driving



of driving parents believe that motorway driving should be an integral part of driving education

Night driving



of parents think 'night driving training' should be compulsory before young people take their driving test

Supervised driving



overwhelmingly agree young drivers should be required to do a minimum number of supervised driving hours prior to gaining their licence

Passenger limits



are in favour of limiting the number of people who can be in a car driven by a young driver

6.3 Signalling the way forward?

Whether it's down to inexperience, youthful bravado or sheer recklessness, it is clear from the tragic accident statistics that some young drivers are, unfortunately, a danger to themselves, their passengers and other road users.

Given the scale of the problem, it is hardly surprising that the cost of car insurance for young drivers has continued to rise. High insurance premiums are a direct consequence of the statistically higher risk that young, inexperienced drivers will cause accidents that result in life-changing injuries and requirements for life-long care for those involved.

The emergence of low-cost telematics affords opportunities here. An inexpensive unit the size of a matchbox can be plugged into a vehicle's diagnostic socket and can monitor driving performance. This information is transmitted back over the mobile phone network to a virtual dashboard that can be viewed by the driver online.

This provides valuable feedback to the driver on how they can improve their driving style so they are both safer and, as a bonus, can make fuel savings of up to 15%.

However, this same information can also provide insurers with insight on where, when and how safely a young driver is driving a vehicle and this will allow an insurer to base premiums on individual risk with substantially lower premiums for responsible younger drivers.

The Association of British Insurers (ABI) argues tough action and meaningful reform is the only way forward if our young drivers are to become better equipped to handle the dangers of driving and attract more affordable insurance premiums.



"Young drivers with passengers driving at night on country roads is a toxic combination compared to motorway driving."


Nick Starling


Director of General Insurance,
Association of British Insurers





6.0 Young drivers


Based on extensive analysis, the ABI recommends the following measures – a stance that has the backing of the RAC:

- 

A minimum 12-month learning period before the driving test can be taken, enabling drivers to undertake supervised practice without an incentive to rush to take the practical test
- 

A ban on intensive driving courses
- 

The lowering of the age at which young people can learn to drive to 16 ½ years
- 

The introduction of graduated driver licensing to include a restriction on the number of young passengers that can be carried by a young driver and a restriction on their driving during night-time hours
- 

A lowering of the blood alcohol concentration for drivers aged between 17 and 24 years



“The Government’s recent announcement that this year it will look into a range of options for improving the safety of...

... young, newly-qualified drivers, including graduated licensing, has to be welcomed. The high insurance premiums and disproportionately high casualty rates provide strong motives for action. The Government should seize this opportunity and take decisive action to reduce the level of casualties involving young drivers.”

David Davies
Executive Director,
Parliamentary Advisory Council for Transport Safety



7.0 Conclusion

A lot can change in 25 years and motoring is no exception. Today, we feel more reliant on our cars than ever before, but increasingly, we have a strong sense of being under pressure. >

The increased cost of motoring and, in particular, the escalating price of fuel, the extra congestion we face on a daily basis, the crumbling road network and our concerns about other drivers' courtesy and compliance with the law are all impacting on our stress levels and testing our patience.

Those who were driving in 1989 look back on this as a golden age of motoring and feel that driving in Britain in 2013 is less enjoyable. Currently, the harsh reality for many motorists is one where journeys to work or just to the shops are fraught with traffic jams, road works, potholes and fuel prices over £1.30 a litre.

7.0 Conclusion

And yet, cars are safer now than ever before; we have the very latest advances in vehicle design and engineering and other innovative, ground-breaking technologies at our fingertips, making it much easier to drive now than ever before.

At the same time, the average price of a new car has actually gone down in real terms, with motorists paying less for more sophisticated, technologically superior vehicles that require less maintenance. But there is little point in owning a car if you cannot afford to keep it on the road.

So what now for our Motoring Nation? This year’s report reveals a somewhat battle-scarred motorist, more dependent on their car than ever before but with few viable alternatives to driving.

Financial hardship

The cost of motoring is causing severe financial hardship to many, bringing ‘motoring poverty’ to those on the lowest incomes and forcing many motorists to curtail social life and visits to family members and friends which has the potential to lead to an increasingly isolated society.

Motorists should not be paying the current levels of motoring taxation for a transport infrastructure that is suffering from years of under-investment, both in its maintenance and development.

Increasing fuel duty has historically been a relatively simple way to raise money for the Treasury’s coffers while addressing the concerns of the environmental lobby, but at what price to motorists? The truth is that drivers’ pockets are being hit hard where it hurts, causing real financial hardship to many.

In this day and age, it is unacceptable that those on lower incomes are struggling to make ends meet as the price at the pump gushes to unaffordable levels. The Government has responded to public concern by shelving the recent scheduled rises, but this is a short-term fix for a motoring taxation regime that is well beyond its ‘sell-by’ date. It is time for a proper review of the UK’s unfair and outdated motoring taxation.

Perfect storm

As motorists’ finances are being stretched to the limit, our roads are getting worse instead of better. Decades of underfunding and several harsh winters have created a ‘perfect storm’ in which Britain’s road network has deteriorated to an embarrassing state of disrepair, damaging vehicles and putting road users at risk. Britain’s cash-strapped motorists should not have to pay through the nose for the ‘privilege’ of driving on some of the worst roads in Europe.

We need to pave the way for the next generation of drivers. Over 90% of travel takes place on the roads and Britain’s economy and future growth prospects will be severely impacted if we don’t reinvest in the country’s transport infrastructure.

Evidence-based guidance

We also need government leadership on speed limits. Motorists would like to see the limit on motorways raised to 80mph but we have to weigh up the safety and environmental impacts of this. Clarification is needed as to whether the proposal to trial 80mph on some stretches of motorway will proceed.

Evidence-based guidance is also needed on when and where it is appropriate for local authorities to use 20mph limits in residential areas. Specifically, we need to understand whether extending the use of 20mph beyond obvious high risk areas like schools and accident blackspots reduces accidents sufficiently to offset the inconvenience of longer journey times and the associated cost to the economy.



7.0 Conclusion

Common ground

And, it is vital we do what we can to protect our young drivers. While it is important not to stigmatise them, the statistics are beyond dispute. For many young drivers, a lack of experience and a tendency to drive at night, often with young passengers who may distract them, combined with youthful enthusiasm can be a potent and highly lethal combination.

Young people are telling us they see flaws in the way they learn to drive and many believe the standard driving test does not equip them with the skills required to cope with the demands of driving today. Parents, too, have voiced their concerns and are overwhelmingly in favour of changing the system to give our young drivers the confidence, skills and experience they so desperately need.

For once, there is much common ground between young and old; learning to drive should evolve to reflect modern day motoring in Britain – this means supervised driving on motorways, at night and in simulated adverse weather conditions as an integral part of driver training.

There is a growing body of evidence that graduated driving licensing with temporary restrictions until young drivers

gain experience on the roads could contribute to cutting accidents.

The wider use of telematics would also help young drivers to monitor their own driving style and could also make insurance premiums more affordable.

Courageous thinking

As this silver anniversary edition of the RAC Report on Motoring is published, there is a palpable sense that Britain is at a crossroads in 2013. Action is needed, both to cut the cost of motoring for those least able to pay and are most dependent on their vehicles, and to improve our transport infrastructure and reverse the decline in the roads network. Government needs to act now in both of these areas to protect the UK's economic growth prospects.

Britain's motorists need courageous, joined-up thinking and longer-term planning from our leaders. Ring-fenced funding and a means of attracting private sector investment is needed for the network and a rethink of how motoring taxation is levied is equally essential so that in 25 years' time we can be proud of our roads and can continue to enjoy the benefits of being an affordable and environmentally sustainable Motoring Nation.



8.0 RAC calls to action

Cost of motoring

The Government's freeze on fuel duty until at least 2014 is welcome, but it's not enough. The recent study by the National Institute of Economic and Social Research funded by the FairFuelUK campaign has established a clear link between the cost of fuel, economic growth and employment. The RAC calls on the Government to take further immediate action to cut fuel duty so as to reduce 'fuel poverty' and stimulate economic growth, create jobs and reduce inflationary pressures.

The RAC also calls on Government to create greater transparency in the price motorists pay at the pump by requiring all receipts issued by filling stations to itemise the cost of the fuel, fuel duty and VAT separately.

Motoring taxation

The RAC calls on the Government to initiate a process of re-balancing motoring taxation to better reflect the needs to offset vehicle carbon dioxide emissions, fund the maintenance and development of the roads infrastructure, administer a national vehicle database and provide incentives to make best use of existing road capacity.

Road maintenance

The RAC calls on the Government to ensure more of the motoring taxation collected centrally by the Treasury is used by local authorities to fund the maintenance of local roads.

The RAC calls on the Government to carry out an objective assessment of the work required to effectively repair the UK's roads and motorways and ensure appropriate funding is ring-fenced and available through a combination of local and national sources.

The RAC believes this will be significantly greater than the £9bn currently allocated to road maintenance and improvements but as motorists contribute over £40bn to the Treasury each year it considers this to be fair.

Without this investment the RAC believes the Government is overseeing a massive decline in the state of our highways impacting business, stalling economic growth and storing up a huge bill for future tax payers.

The RAC also calls on local authorities to follow recommendations of the Government's Pothole Review to make best use of the money available by preventing rather than repairing potholes and adopting a 'right-first-time' approach.

Motorway speed limits

A majority of motorists support raising the speed limit on motorways to 80mph. While the Government proposed trialling an 80mph limit on some stretches of motorway, this has not been progressed. The RAC calls on the Government to clarify its policy on raising the motorway speed limit to 80mph.

20mph zones

The RAC calls on the Government to provide clear guidance to local authorities on the use of 20mph limits based on rigorous analysis that balances road safety with keeping traffic moving, ensuring 20mph limits are used where they can to make the greatest difference to safety.

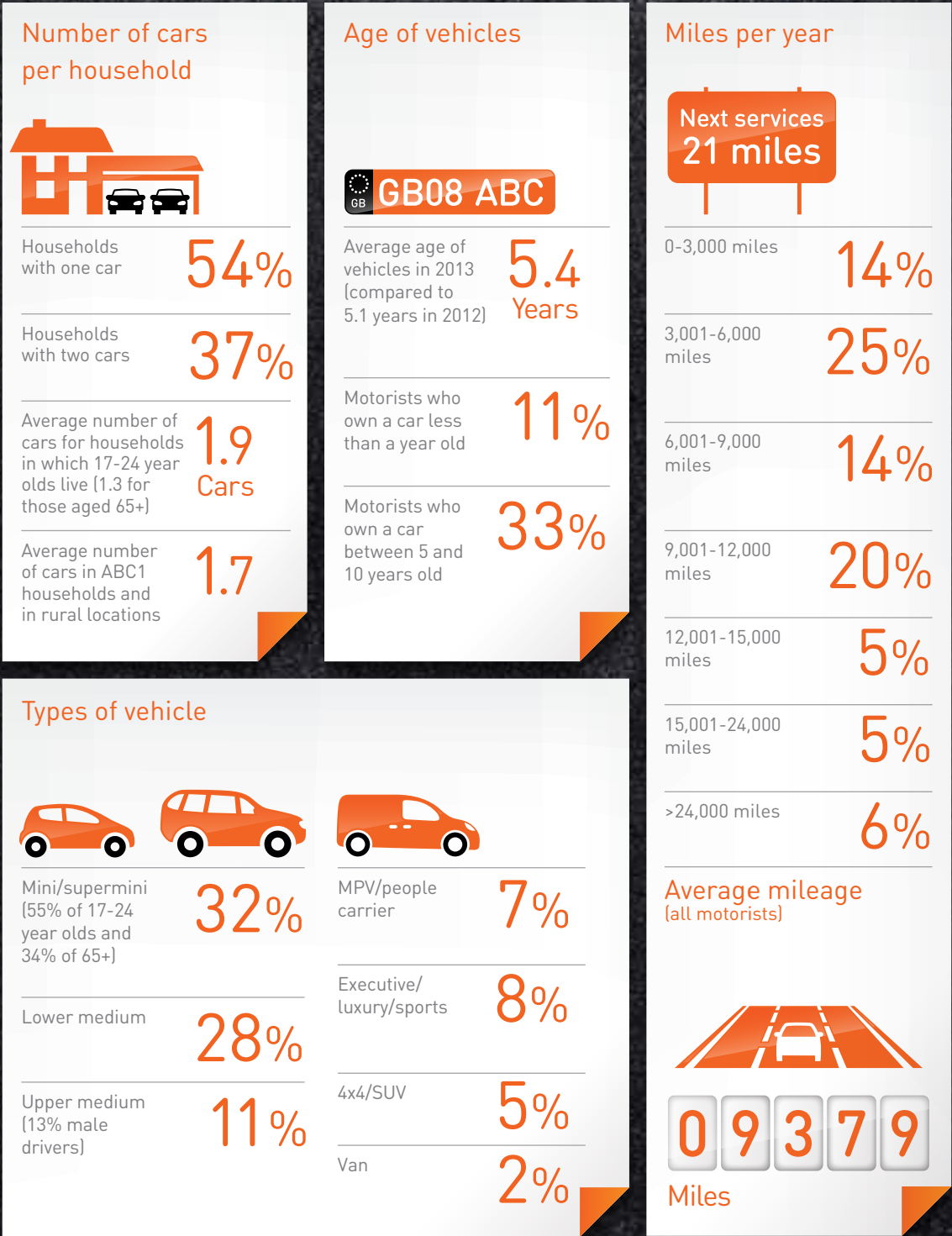
Young drivers

The RAC calls on the Government to use the forthcoming green paper as a step towards reforming driving education for young people and introducing graduated driving licences with a minimum supervised learning period and restrictions on the number of passengers permitted in the car.

 Go to
rac.co.uk/reportonmotoring
to find out more and have your say



9.0 Who is the motorist?



10.0 Appendix

10.1 Research methodology

The RAC Report on Motoring 2013 is based on a large-scale internet survey carried out by Quadrangle on behalf of the RAC.

In total, Quadrangle interviewed 1,542 British motorists (i.e. those who hold a current driving licence and drive at least once a month). The survey was conducted in March 2013, with the questionnaire taking around 25 minutes to complete.

The number of company car drivers in the sample was boosted by an additional 27 interviews to provide sufficient numbers for analysis of this group (resulting in a total of 107 company car drivers in the overall sample).

The sample was nationally representative of age, gender, socio-economic groups, all UK regions and new car buyers. The number of company car drivers in the sample was weighted by 8% to provide sufficient numbers for analysis of this group. The results were then post-weighted to represent national household car ownership.

10.2 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

11.0 Company overview

Contacts

With over seven 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 which will change the face of rescue – giving remote diagnostics and breakdown alerts.

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

Advisory Panel

The Report has been 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
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Professor Stephen Glaister,
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RAC Patrol Ambassadors Kevin Andrews and Phil Kerby, dressed in authentic 1950s patrol uniforms, saluting motorists as they arrived at the pre-1966 car park at Goodwood Revival in September 2012. The RAC is proud sponsor of Goodwood Festival of Speed and Revival.



A pdf copy of this report is available at rac.co.uk/reportonmotoring and is also available from the App Store for free: 'RAC ROM 2013'

