RAC Report on Motoring 2018

The frustrated motorist

CELEBRATING
30 YEARS
OF THE REPORT ON MOTORING

Mark Souster, RAC Patrol
#OrangeHero of the Year 2018

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30 YEARS
OF THE REPORT ON MOTORING

RAC Report on Motoring
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Foreword
Wing Commander Andy Green OBE

I am delighted to introduce the 2018 RAC Report on Motoring. This is the 30th annual Report and like previous editions, tracks motorists' changing opinions, priorities and concerns.

In 1988, when the first Report on Motoring was published, the World Land Speed Record stood at 633mph, after Richard Noble's heroic efforts forced 'Thrust 2' to its limit in 1983. In 1997, new technical solutions allowed Thrust SSC to blast its way to a spectacular 763mph, becoming the only car in history to achieve a supersonic land speed record. Jumping forwards to the present, Bloodhound SSC is now targeting the almost unimaginable speed of 1000mph.

Bloodhound is generations ahead of its predecessors, using the latest jet and hybrid rocket propulsion, controlled by multiple high-speed computers, with on-board video and data streaming to a global audience. It's been created as an 'engineering adventure' to showcase science and technology.

Road vehicle technology has arguably advanced even more dramatically, with electronic systems finding their way into almost every part of passenger cars, making them more fuel efficient, cleaner, more pleasant to drive and ride in, and a lot safer. However, the quality, capacity and safety of our roads have not made the same progress.

Together with the continuing high costs of motoring and its environmental impact, these are key themes of this year's Report.

More details at bloodhoundssc.com

As in previous Reports, road safety is an important theme. There is still much debate about speed limits but (at the risk of stating the obvious) speed must be appropriate to the road and the conditions. This is true whether you are doing the school run or trying to break the World Land Speed Record. In October 1997, we had to wait for several days of perfect weather because our dry lake-bed track was damp and inconsistent.

We were about to set the world's first ever supersonic record and we needed the right conditions, so we waited until it was safe. This same principle applies equally to driving a family car. While the car may be capable of reaching speeds of over 100mph, the national speed limit has been set at 70mph for motorways and dual carriageways to provide an acceptable level of safety for all vehicles on the road. If it is dark, with rain and poor visibility, then the safe limit may well be substantially lower.

Another theme that emerges from this year's Report is one of motorists' uncertainty on what is needed to improve air quality in our towns and cities. How do we reduce carbon dioxide, nitrogen dioxide and particulate emissions? What type of vehicles should we be choosing?

While the Government has set the target to remove new conventional petrol and diesel-powered vehicles from showrooms by 2040, the path to get there is not clear.

The range of pure electric vehicles is improving and batteries will get cheaper, but without common charging standards, investors in recharging infrastructure will worry they are buying the 21st century equivalent of Betamax video.

As the quest for safe and environmentally sustainable road travel continues, we should look to ourselves for solutions, as Britain remains one of the world's leaders in innovation and technology.

This is the key principle of the Bloodhound project, as we engage directly with more than 100,000 students every year, and millions more online, to inspire and excite them about the science, technology, engineering and mathematics of the world's fastest car. These are the young scientists and engineers of tomorrow, who will build the high-technology, low-carbon world of the future, and we are grateful for the support of the RAC in helping to promote the work of the Bloodhound Project.

Motorists' own assessment of their dependence on their cars has hardly changed over the last 30 years and cars remain a central part of life for most of us. As a result, this Report is relevant to anyone that uses the roads and I commend it to you.

Andy Green OBE

Andy Green

Executive summary

The views of the UK's approximately 40m motorists[1] are of the utmost importance to politicians, local authorities and the motor industry when it comes to developing policies and plans for the future.

The 2018 Report on Motoring provides a detailed picture of drivers' attitudes and opinions on important topics – from understanding the continuing role the car plays in so many people's lives to the condition and maintenance of the UK's roads and the behaviour of other road users.

The Report also compares the most recent findings with those from previous annual Reports on Motoring in order to highlight changes and trends in motorists' views.

The research contained within the Report is based on interviews conducted with a representative sample of more than 1,800 drivers from across the UK.

Below is a summary of the key findings in the 2018 Report:

The top concern among motorists is now the condition and maintenance of local roads.

The state of local roads – in particular, road surface quality and the presence of potholes – has become the most frequently cited concern among Britain's motorists.

This year, **42%** of motorists say the condition and maintenance of local roads is one of their four main concerns, a significant rise on the **33%** recorded in 2017. Almost one in five drivers (**17%**) say this issue is their number-one concern.

Meanwhile, **78%** of motorists believe the state of both local and strategic roads – major dual carriageways and motorways – is 'generally poor'; **66%** say the condition of their local roads has deteriorated in the past 12 months, while **40%** say the same of major roads.

The majority of drivers (**83%**) would like to see a proportion of the motoring taxes they pay ring-fenced to fund maintenance of local roads.

Car use has risen for the first time in four years.

In 2018, **27%** of motorists say they are using their cars more than in 2017, while only **18%** say their use has reduced; this follows three years where a greater number of drivers reported using their car less. Not surprisingly, **33%** of motorists say they are more dependent on their car now than a year ago compared with **27%** in 2017. Of those who are driving more, **24%** blame a deterioration in public transport services.

Of motorists who are in work, **62%** say their car is their main way of commuting, while for motorists with school-age children, **61%** drive to school – although only **18%** of this group do not then go on to drive to work. This highlights how difficult it is for the majority of those taking their children to school by car to switch to alternatives such as walking, cycling or public transport.

The dangers posed by other motorists' careless, aggressive or illegal driving remains a significant issue.

The use of handheld mobile phones by other drivers at the wheel is the second most common concern this year: **38%** say this is one of their top four concerns, only slightly down from **40%** in 2017. The percentage of drivers admitting to using a handheld phone while driving has not fallen in the last year despite the stiffer penalties introduced in early 2017.

The aggressive behaviour of other motorists – which could include the likes of tailgating, undertaking or even road rage – has been named as a top-four concern by **28%** of UK motorists this year, while drink-driving is a concern shared by **27%**.

Sadly, the percentage of drivers admitting to drink-driving has risen to its highest level in recent years.

These findings are particularly interesting in light of motorists' views on traffic law enforcement: this year there has been an increase in drivers who believe they will not be caught if they break most motoring laws – up to **28%** from **24%** in 2017 – while more than two-thirds (**68%**) think there are not enough dedicated roads police officers to enforce existing laws (up from **62%** in 2017).

1. https://data.gov.uk/dataset/driving-licence-data

Executive summary

The cost of fuel is the third most important concern in 2018, with most drivers saying their expenditure on fuel has increased over the last year.

Owners of plug-in hybrid vehicles are more likely to say their fuel expenditure has fallen – most probably as a result of having switched from a conventional diesel or petrol vehicle.

Concern about the cost of insurance has fallen over the past 12 months, with **10%** of motorists saying their premiums have fallen compared to **6%** in 2017.

More than half of drivers (**56%**) say general parking charges have risen since last year, a figure which is consistent with many local authorities increasing parking charges, possibly to help balance their books at a time of ever-increasing pressure on budgets.

There has been a fall in the proportion of motorists who admit to speeding, apart from on 30mph urban roads.

Following similar trends seen in 2017, fewer drivers are saying they exceed speed limits on the UK's roads. In particular, compliance on 60mph country roads and in 20mph urban zones has improved. However, **57%** of motorists still say they have frequently or occasionally broken the 70mph-limit on Britain's motorways in the past 12 months, but this is a significant decline from **66%** and **70%** in 2017 and 2016 respectively.

A fifth (**20%**) of motorists say they have been caught speeding at some point over the past 10 years, and there is support for speed awareness courses: **48%** of those who have attended courses say they have not deliberately broken the speed limit since and a further **44%** claim to have slowed down but still speed sometimes; **38%** of all motorists think such courses are a good idea.

While road safety campaigners consistently call for changes and amendments to the Highway Code, worryingly only **49%** of all motorists say they have consulted it at any time in the last 10 years.

While environmental issues do not rank high in the overall list of motorists' major concerns, a large number say they are increasingly worried about the impact of vehicles on local air quality.

Only **12%** of drivers say the environmental impact of motoring is a top-four concern this year, although this is up from **9%** in 2017. But **44%** say they are more concerned about the impact of vehicles on local air quality than they were 12 months ago – an increase of four percentage points since 2017.

More than half (**52%**) think the Government is unfairly targeting diesel drivers as a key source of air pollution. Drivers clearly want to see greater financial incentives for the take-up of zero emission vehicles, and of the policies that local or central government could introduce to improve air quality, action to restrict older, more polluting vehicles from areas with poor air quality is both popular and seen as likely to be effective.

A significant proportion of motorists say they are confused about what car to buy next.

Two-thirds of motorists (**66%**) say they are either confused or unsure whether they are confused or not about which vehicle to buy next as a result of media and political coverage of the environmental impact of motoring, while only **30%** say they are not confused.

Almost half (**47%**) say they are unsure whether new diesel vehicles are bad for the environment, while there is strong support (**69%**) for the idea of a central database that could enable motorists to look up the Euro emissions standard of any vehicle.

There has been a fall in the proportion of drivers who plan to buy a petrol car next time they change their car, from **58%** in 2017 to **52%** this year, while **18%** still expect to buy a diesel next, a similar level to last year. There is, however, little sign that either plug-in hybrid or pure electric vehicles are taking off yet, with only **10%** saying they expect to choose one as their next car.

Four in 10 motorists state that a pure electric vehicle needs to be no more expensive to purchase or lease than an equivalent petrol, diesel or hybrid vehicle for them to choose one as their next vehicle, and **67%** say they would require a minimum range of 300 miles. Only **36%** of motorists expect to opt for a pure-electric vehicle within the next 10 years and **49%** within 15 years.

1

What's on motorists' minds?

Life on the roads is never easy for the UK's motorists. And 2018 is no different, with many issues frustrating drivers as they go about their daily lives, whether that's commuting to and from work, driving for business or for social and domestic purposes. >

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1 What's on motorists' minds?

This year's Report on Motoring has found that motorists' most often cited concern is now the condition and maintenance of local roads.

The Report asks drivers to name the four motoring-related issues that concern them most from a list of the 20 most commonly raised, to produce a percentage that shows the level of overall 'concern' about each particular issue.

In 2018, 42% of motorists say the state of local roads is an issue of concern, and this proportion is significantly higher than the 33% recorded 12 months ago. The 42% figure translates to around 16m UK drivers who are dissatisfied with the state of the country's local roads, and it represents the highest level of concern for any single issue at any point over the last four years.

2008 Flashback

In the 2008 Report on Motoring, 60% of drivers said they thought the increased cost of motoring was one of the biggest changes of the previous 20 years – although that year's Report found that motoring-related expenses had actually fallen in real terms since 1988.

Top 10 overall concerns

*In 2016-2017 we asked about the **rudeness** of other drivers

1 What's on motorists' minds?

The second largest concern in 2018 is motorists' use of handheld mobile phones: 38% say this is a concern, down slightly on last year's 40%. The cost of fuel is the third-ranked concern, although this was mentioned by just 29% of motorists.

The fourth-ranked issue of total concern this year is the aggressive behaviour of other road users (28%), while drink-driving (27%) is ranked fifth – up from eighth place in 2017 (24%).

A quarter of motorists (25%) say that the cost of insurance is a concern, and a similar proportion feel that about people driving without tax or insurance, although in both cases this is a slightly lower percentage than 12 months ago.

Concern about congestion rose in 2016 but there has not been a further increase since then. In fact, there has been a small decrease – from 26% to 24% – in the percentage of motorists who say congestion or slower journey times is a concern, positioning this as the eighth-ranked concern.

Figures from the Department for Transport[2] (DfT) indicate that traffic volumes increased in 2017 by 1.3%. However, motorists appear less phased by this and more worried about road conditions than the number of cars on the roads this year.

Concern about the environmental impact of motoring and the negative effects of diesel emissions on health have increased to some extent this year, but these issues remain well down the overall ranking of motorists' priorities.

1988 Flashback

In 1988, the Report on Motoring asked drivers for their predictions of life on the road in the then-distant year of 2001:

- **85%** expected all cars to be required to use unleaded petrol which 77% believed would only be sold in litres not gallons
- **56%** expected cars to be banned from all town centres
- **53%** thought London's cars would only be able to travel at walking pace during rush hour

2. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/722302/road-traffic-estimates-in-great-britain-2017.pdf

1 What's on motorists' minds?

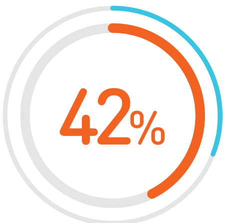
1.1 The state of our roads

The state of the UK's local roads, and in particular the hazards presented to road users by the apparently ever-increasing number of potholes, has been among the leading concerns cited by the motorists surveyed for the Report for several years.

In 2018, however, our research has identified a sharp rise in the proportion of drivers who say the condition and maintenance of such roads is a top concern: this is now 42% of all those questioned against just 33% in 2017 and 38% a year earlier.

It should be pointed out that these figures are a measure of relative concern – in some cases, falling concern about certain issues, for example the cost of motoring or handheld mobile phone use, will inevitably result in rising concern in other areas and vice versa.

However, as we highlight in Chapter 2, further data collected in this year's survey confirms there has been a definite step change – very much for the worse – in motorists' views on the state of our roads. Significantly for policymakers, this comes at a time when both official government statistics and this Report's own findings (see Chapter 5) suggest road use in the UK is on the rise.



of drivers say the condition and maintenance of the UK's roads is a top concern

33% in 2017

"I think there is a strong case to be made that the weather conditions experienced in many parts of the UK at the end of winter have had a significant impact on the condition of both local and major roads, and that this has been reflected in this year's Report."

MIKE QUINTON
Chief Executive,
IAM RoadSmart

1 What's on motorists' minds?

As well as highlighting motorists' overall concerns, the Report on Motoring also asks respondents to identify their single 'top concern': this year, 17% of motorists say the condition and maintenance of local roads is their number-one issue. Again, this represents a significant increase on the 2017 figure (10%).

Concern about the condition and maintenance of Britain's motorways and major A-roads (or so-called 'strategic' roads) remains far lower than for local roads. Just 2% (unchanged from 2017) of drivers cite this issue as their top concern, ranking it 14th on the list of top concerns.

Nevertheless, there is a significant increase in the percentage of drivers claiming that the surface condition of strategic roads is worse now than 12 months ago.

17% of motorists say the condition and maintenance of local roads is their number-one concern

10% in 2017

40% say the condition of strategic roads has worsened over the last year, up from 29% in 2017

1998 Flashback

The RAC urged the Government to recognise the inevitability of people using their cars more and to ensure they invested sufficiently in the road infrastructure and road management to enable it to cope with the increase in demand.

More motorists this year say the condition and maintenance of local roads is their number-one issue.

1 What's on motorists' minds?

1.2 The behaviour of other drivers

The issue that ranks second on the list of total concern this year is the use of handheld mobile phones at the wheel: 38% of drivers say this is a current concern, although this is marginally down on the 40% in 2017, when it was motorists' biggest overall concern.

When asked about the aggressive behaviour of other drivers, a total of 28% name this as one of their top concerns in 2018. This makes aggressive behaviour one of the most significant overall concerns, ranking fourth behind the state of local roads, handheld phone use and the cost of fuel.

In fifth place this year is drivers under the influence of drink: 27% say this is a major concern, which represents a small but statistically significant increase on the 24% in last year's Report.

Drug-driving is less of a concern: 20% of motorists say this is one of the four most important issues, ranking it in 10th place overall. When combined, however, 38% of drivers say that either drink- or drug-driving – or both – are issues of significant concern, up from 34% in 2017.

There has been a fall in overall concern both about people driving without tax or insurance (25% from 29% in 2017) and drivers breaking traffic laws (22% against 25% in 2017). These issues rank seventh and ninth respectively this year.

We report further data about motorists' views on the hazards outlined above, as well as attitudes to speeding and measures to tackle dangerous behaviour, in Chapter 3 of this Report.

27%

of drivers are concerned about other drivers under the influence of drink

28%

of drivers say the aggressive behaviour of other drivers is one of their top-four concerns

RAC call to action:
Fuel duty: see page 80

RAC call to action:
Insurance Premium Tax: see page 80

1 What's on motorists' minds?

1.3 The cost of motoring

The cost of fuel is the third biggest issue for motorists, with 29% citing it as one of their top-four concerns this year – this represents a slight increase on 2017's 28%. Eight per cent of drivers say their petrol, diesel or electricity costs for their vehicle have fallen in the past year, up from 6% who took this view in 2017. Nonetheless, a majority (61%) say their fuel expenses have increased since last year; the same proportion as 12 months ago, while 27% report no change (down from 32% in 2017).

These figures are consistent both with the increase in vehicle miles reported by the DfT (traffic volumes increased in 2017 by 1.3%) and also the fact that forecourt prices have steadily increased over the past year. At the end of May 2017, for example, the average cost of a litre of unleaded was just over 116p, but 12 months later it was over 126p largely due to rising oil prices and a weakening pound against the dollar.

61%

of drivers say their fuel expenses have increased since last year

However, the timing of the survey for this year's Report means that some of the fuel price increases seen in May 2018 will not be reflected in the figures set out in this section.

Total concern about the cost of insurance has fallen from 28% to 25% – a statistically significant decrease – over the past 12 months, and this issue now ranks sixth overall.

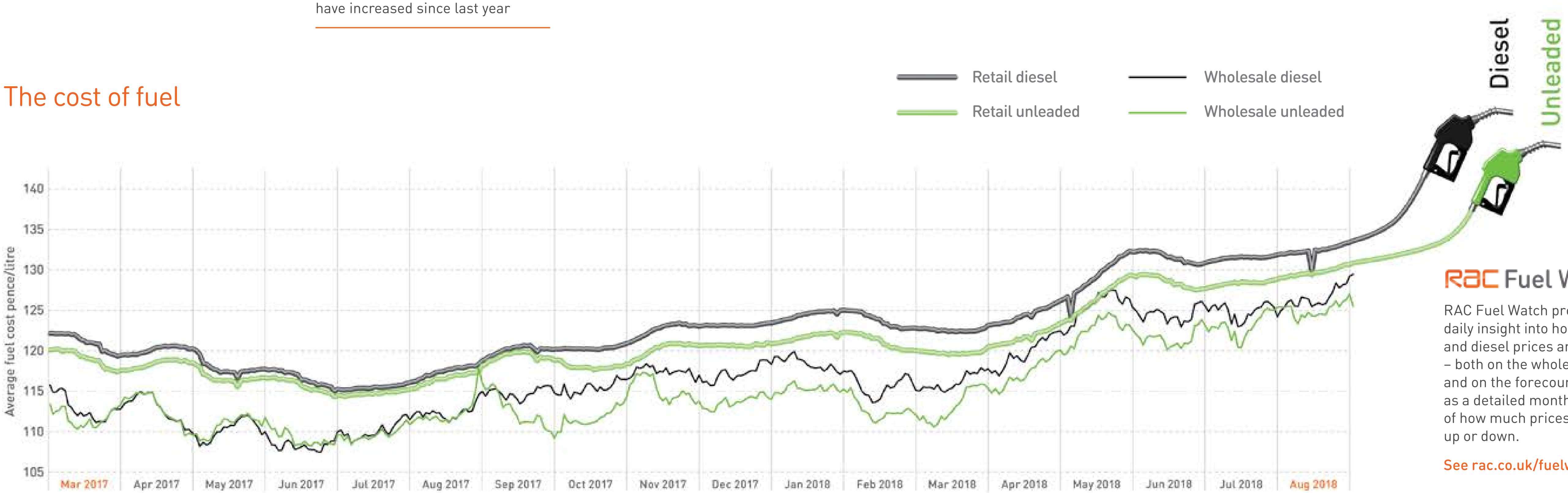
It should be noted the rate of insurance premium tax was raised to 12% in June 2017, the third increase in the tax in less than three years.

However, industry figures[3] suggest typical comprehensive premiums have nonetheless declined during the period covered by this year's Report (the 12 months to May 2018).

This trend may help to explain the fact that 10% of motorists report their premiums have fallen over the past year compared with 6% who said the same in 2017.

The proportion of motorists who say their car tax bill has increased (39%), stayed the same (51%) or fallen (6%) in the past 12 months has not changed when compared with the 2017 Report.

The cost of fuel



RAC Fuel Watch

RAC Fuel Watch provides a daily insight into how petrol and diesel prices are changing – both on the wholesale market and on the forecourt – as well as a detailed monthly analysis of how much prices have gone up or down.

See rac.co.uk/fuelwatch

3. https://www.abi.org.uk/news/news-articles/2018/07/cost-of-motor-insurance-falls-for-second-successive-quarter/

1 What's on motorists' minds?

A similar picture emerges on car maintenance and repair costs: 45% say they have increased, the same proportion say they have remained the same and 3% report they have fallen.

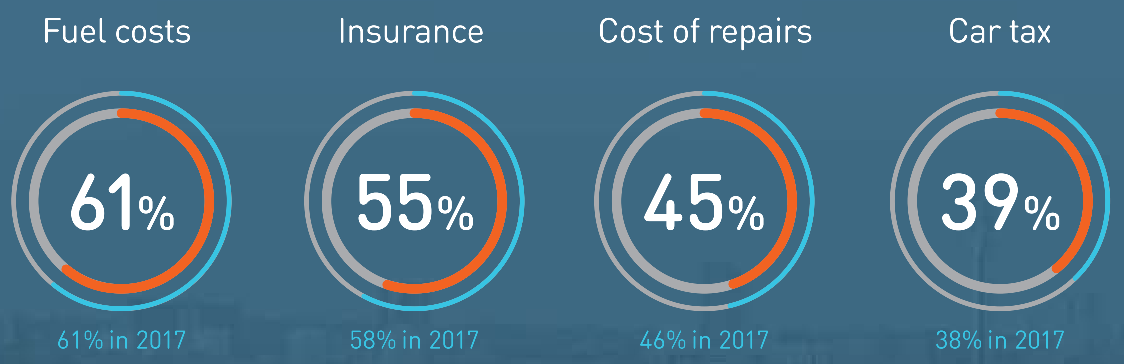
This year's data shows some differences between drivers of plug-in hybrid vehicles and the average: for example, they are, not surprisingly, far more likely to report that fuel costs have fallen. Almost two-thirds of plug-in hybrid drivers (63%) say their fuel expenditure is lower this year, a reflection of the fact that motorists who have switched from a conventionally fuelled vehicle since 2017 are likely to have seen their bills fall.

At the same time, a third (33%) of plug-in hybrid drivers say their insurance costs are lower than a year ago. Concern about the cost of parking has barely changed over the past 12 months: 16% say this is a top-four concern against 17% in 2017.

More than half of motorists (56%) say general parking charges have increased since last year (24% say they have stayed the same), while 16% report a rise in residents' parking permits (16% no change and 59% said this charge does not apply to them). Many cash-strapped local authorities have increased parking charges to help balance the books and this is reflected in these figures.

Running costs

The percentage of motorists who have felt a rise in fuel and other types of running costs.



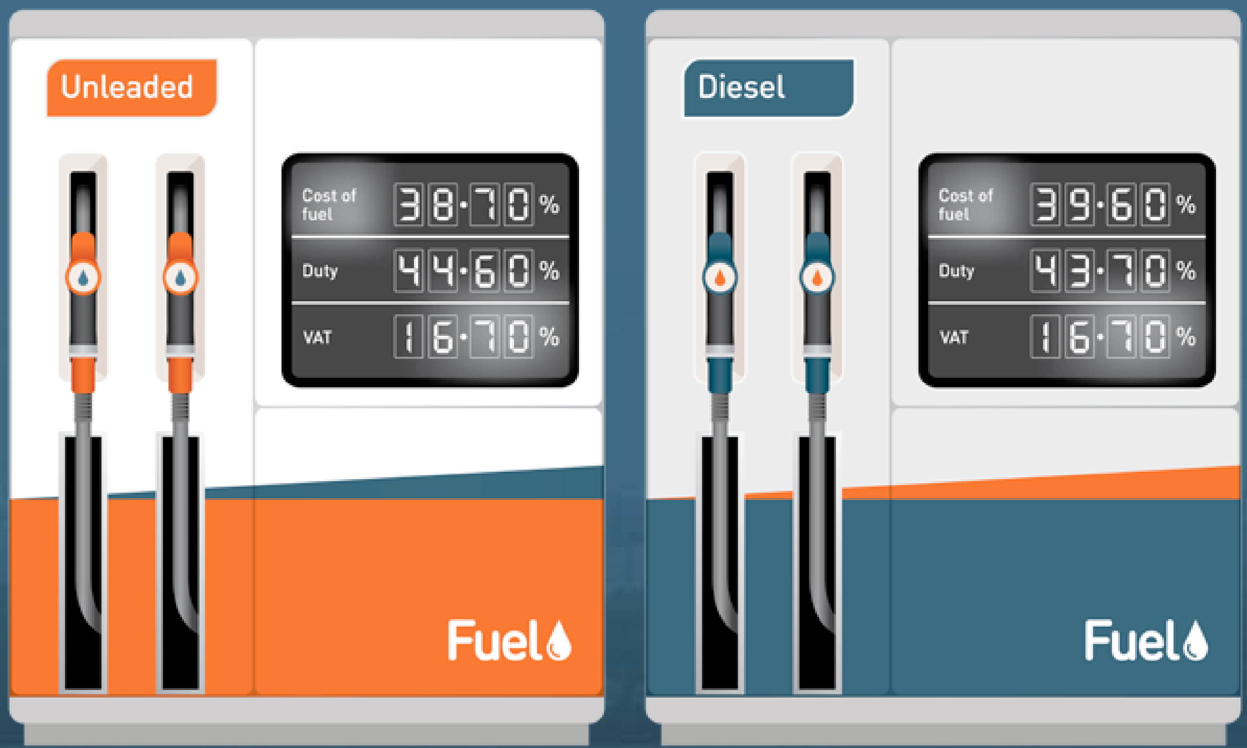
The percentage of those saying their residents' parking charges have risen is greater in London (29% vs 16% average) and this may have been influenced by some London boroughs introducing surcharges for diesel vehicle owners.

Finally, 23% of motorists say their expenditure on road tolls has risen over the past 12 months, while 21% say they have remained static (and 38% say this does not apply to them).

How motorists respond to this question is likely to depend on where they live. For those who, for example, regularly use the Dartford Crossing or the M6 Toll, the response will be heavily influenced by what has happened to the charges on these roads.

Fuel costs

Breakdown of current cost of unleaded petrol and diesel. Drivers pay over £46bn in motoring taxes to the Treasury per year.



2

The state of our roads

The condition and maintenance of the UK's road network – and in particular local roads – has long been a major theme of the Report on Motoring. >

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The condition of local roads »

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The strategic road network »

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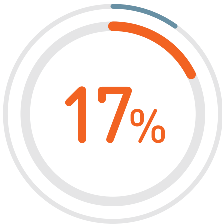
Congestion and journey times on all roads »

2 The state of our roads

This year we have seen a marked increase in the proportion of drivers who say the state of local roads is their top overall concern, up from 33% in 2017 to 42% in 2018. More specifically, 17% cite this as their number-one concern compared to 10% in 2017.

The state of local roads is the issue of greatest concern for motorists this year.

While these figures only indicate levels of concern about local road conditions relative to other issues, it is clear from responses to more specific questions on this topic there has been a significant increase in drivers' dissatisfaction over the past 12 months, as we will make clear later in this chapter.



10% in 2017

The state of local roads is the single biggest concern at 17%

26%

of those who stated the condition of their local roads was worse than a year ago blamed the amount of litter

"It is surely time that central and local government got to grips with the state of the UK's roads, whether they are local or motorways and main dual carriageways. The overwhelming key concern for motorists is the road surface, with litter being a consistently strong second.

"Highways England and local authorities need to make a concerted effort to improve the condition and appearance of our roads so that motorists can feel safer and a little prouder of their country – and so we do not continue to lag behind many other developed economies."

THEO DE PENCIER
Non-executive Board Member, Transport Focus;
Former Chief Executive, Freight Transport Association

2 The state of our roads

Concern about the state of strategic roads – that is, motorways and high-speed dual carriageways – has not increased significantly this year relative to other issues. However, a growing number of motorists feel the condition of these roads has also deteriorated over the last 12 months.

When asked specifically for their views on the state of the UK's roads, 78% agree the state of them – including motorways and major dual carriageways as well as local roads – was 'generally poor'. Less than one in 10 (9%) disagree with this.

Those living in villages and rural areas are more likely to agree (86%), as are those over the age of 45 (85% agreement). However, those living in urban areas (69%) or London (71%) are less likely to agree that road conditions are poor, as are drivers aged between 25 and 44 (69%). As well as identifying widespread unhappiness about the state of road surfaces, the Report has also sought motorists' views on how best to fund investment in the network and to what extent they would be willing to pay for such investment in the form of higher motoring taxes.

78%

of drivers agree the state of UK roads is generally poor

"There is a clear message in this year's Report that, at a time when car usage is on the rise, motorists believe there has been a clear deterioration in the condition of the UK's roads. This is an issue that urgently needs to be addressed."

STEVE GOODING
Director
RAC Foundation

66% of motorists say the condition of local roads has deteriorated over the last 12 months.

2 The state of our roads

2.1 The condition of local roads

As stated, the condition and maintenance of local roads is the biggest concern for motorists. The Report has identified a significant worsening of sentiment: in 2017, for example, 51% of drivers said the condition of local roads had deteriorated in the previous 12 months. This year that figure has leapt to 66%.

Motorists who live in the East of England (81%), the East Midlands (82%) or Scotland (78%) have a greater tendency to say conditions have become worse.

Just one in 10 (9%) of motorists say conditions have improved (7% in 2017) – urban (20%) and London (35%) residents are far more likely to take this more positive view.

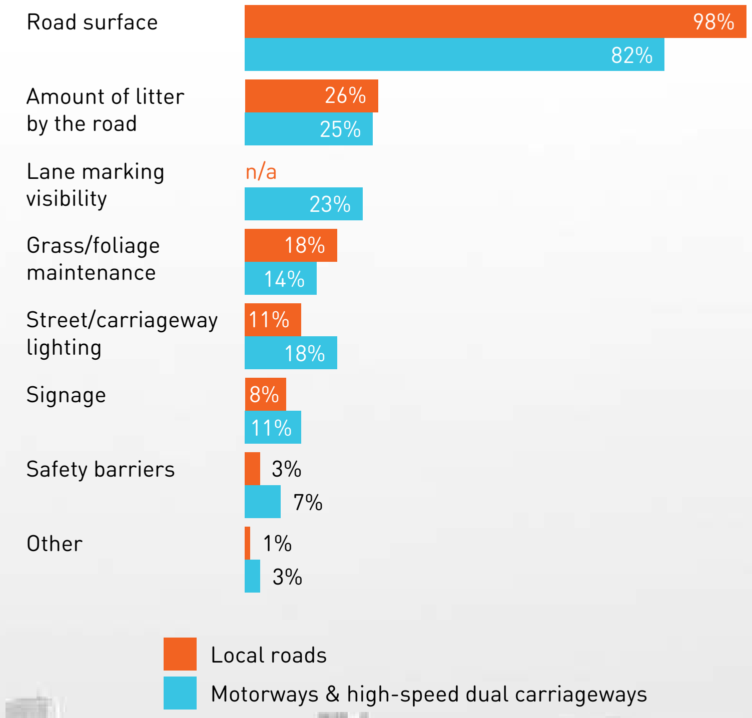
Among those who say conditions are worse in 2018, the overwhelming majority (98%) blame road surfaces – this is an even higher proportion than the 92% who did so last year.

Other problems cited by motorists in this group include litter by the roadside (26%), grass and foliage maintenance (18% – down from 22% in 2017) and street lighting (11%, down from 16% a year ago).

of drivers said the condition of local roads had deteriorated in the last year

There is little doubt local road conditions in many parts of the country are substandard and have been so for quite some time. The most recent edition of the annual independent survey carried out by the Asphalt Industry Alliance (AIA) shows the backlog in terms of road repairs and maintenance continues to grow: the AIA's 2018 Annual Local Authority Road Maintenance (ALARM) report, which was published in March[4], shows around 20% of local roads are in 'poor structural condition', which is defined as meaning they have five years of life or less remaining. This proportion has risen from 17% in 2017, and continues a trend seen over recent years.

Concerns about the state of local roads and motorways



4. http://www.asphaltuk.org/alarm-survey-page/

RAC call to action:
Local roads: see page 80

2 The state of our roads

Often, periods of particularly cold and wet weather can exacerbate road surface problems and it may be that the exceptional wintry storms – in particular, 'the Beast from the East' and Storm Emma which were experienced by much of the UK in late February and early March – led to a rise in the number of potholes shortly before this year's survey was carried out.

The RAC's own Pothole Index found that in the first three months of 2018, the proportion of breakdowns caused by road surface problems almost doubled from 1.2% in the final quarter of 2017 to 2.3% of total breakdowns attended – the highest rate since early 2015.

The second three months of 2018 led to RAC patrols dealing with more pothole-related breakdowns than in any other second quarter since 2015.

Between April and June, an analysis of RAC breakdown data showed there were a total of 4,091 call-outs for damaged shock absorbers, broken suspension springs or distorted wheels – faults which are most likely to be directly attributed to poor quality road surfaces.

The Government has continued to make some efforts to address the issue. In March 2018, transport secretary Chris Grayling announced a further £100m would be made available to help local authorities repair potholes and storm damage that had resulted from the recent harsh weather.

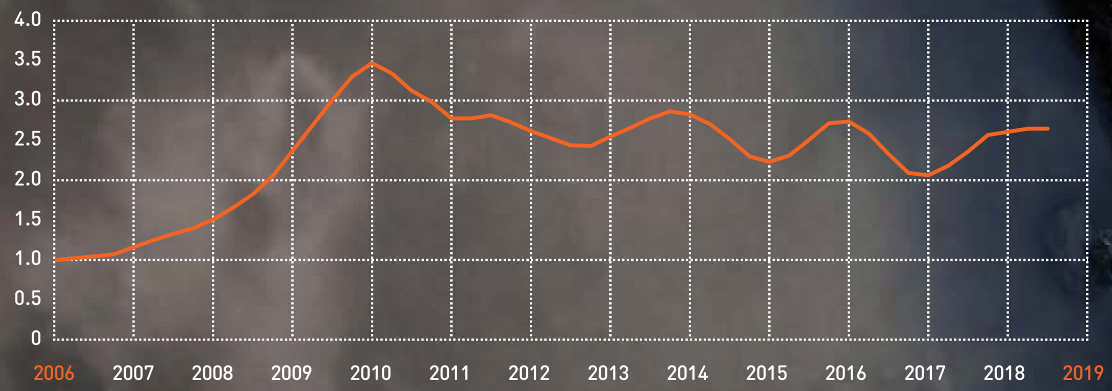
However, this needs to be seen in the context of the maintenance backlog of over £9.3bn reported by the AIA which is their estimate of the one-off investment required to return local roads to a state that is fit-for-purpose.

The AIA's report found that while local authorities had benefitted from an increase in average highway maintenance budgets this year, the shortfall between current spending and what is actually required to keep roads in 'reasonable order' stands at £556m – an average of £3.3m for each local authority and these sums are what is required to maintain the status quo and do not address the huge preventative maintenance backlog.

Over
£9.3bn
investment required to return local roads to state that is fit for purpose

RAC Pothole Index

The RAC has used its database of over two million breakdowns attended each year to develop the RAC Pothole Index as an ongoing monitor of the state of the UK's roads. The index is essentially a measure of how often the average RAC member requests roadside assistance for a breakdown where the fault was of a type where damage from a pothole or other road surface defect was the most likely cause i.e. damaged shock absorbers, broken suspension springs and wishbones and distorted wheels. This 'call-out rate' is aggregated over the previous 12 months to remove seasonal effects.



The index uses the call-out rate at the start of 2006 as a benchmark and the value of the index is therefore a measure of how likely a motorist's vehicle is to suffer pothole damage compared to 2006. Thus an index of 1.2 would mean the likelihood of pothole damage had increased by 20%.

The index shows there was a steady deterioration in the condition of roads between 2005 and 2010 as highways authorities' budgets were tightened and many cut back on preventative maintenance.

After 2010 it suggests there was some overall improvement in road quality, but progress is heavily influenced by extreme weather and the availability of emergency funding from central government. However, since the beginning of 2017 the index indicates the condition of roads across the UK has deteriorated steadily.

RAC Pothole Index
rac.co.uk/potholeindex

2 The state of our roads

Clearly, extra central government funding to help alleviate the most serious road surface problems is welcome, but it is clear that sustained long-term investment is needed to fully address the condition and maintenance issues frustrating millions of UK motorists.

Encouragingly, there are signs the Government may consider a fresh approach to how local road maintenance is dealt with. During a House of Commons debate on potholes and road maintenance in early June, for example, transport minister Jesse Norman said he thought there was a case for "a more long-term, strategic approach to local roads".[5] Policymakers should take note that there is widespread support among drivers for a proportion of the motoring taxes they pay being ring-fenced to fund the maintenance of local roads: this year's Report found that 83% would back such a move.

Meanwhile, almost half (47%) of motorists say they would be willing to pay more in motoring taxes if the extra money was devoted to road improvements – this proposition is more likely to be supported by London residents (63%) as well as those who frequently drive for business (60%). Motorists are concerned at the absence of a long-term central government plan and funding to address the problem of effective local road maintenance.

The percentage who say they would not be happy to pay more in tax for this purpose has, however, risen from 25% in 2017 to 29% this year, though it is broadly similar to the level recorded four years ago. This suggests that more needs to be done to better fund local road maintenance using current levels of taxation – and 78% of motorists agree the motoring taxes they pay aren't sufficiently re-invested into local roads.

1988 Flashback

Two out of five (39%) of Britain's drivers were dissatisfied with the road system in the area where they live and nearly three out of 10 (28%) expressed dissatisfaction with the national motorway network.

5. https://hansard.parliament.uk/commons/2018-06-05/debates/03FC8C46-D1AA-413F-BC95-FFDC57864E04/PotholesAndRoadMaintenance

The problem has got so bad that in August 2018 the House of Commons Transport Select Committee announced an inquiry into the condition of local roads which has been widely welcomed.

83%

of motorists would like to see a proportion of the motoring taxes they pay ring-fenced to fund maintenance of local roads

47%

Almost half of motorists are willing to pay more in motoring taxation to improve roads

RAC call to action:
Major roads: see page 80

2 The state of our roads

2.2 The strategic road network

When compared with the other pressing issues facing motorists, the state of the country's strategic roads – motorways and high-speed dual carriageways – does not rank as a major concern in its own right. Just 14% of drivers say it is among their four main concerns (a small rise on last year's 12%) and only 2% say this is their top concern.

However, there has been a significant increase in the proportion of motorists who think the condition of these roads has worsened in the last 12 months: 40% believe this to be the case, up from 29% who held this view in 2017.

Less than half (46%) think conditions have stayed the same (59% in 2017), while 9% say they have improved (8% last year).

Drivers who live in the East of England (54%) or who are aged between 45 and 64 (50%) are more likely to report conditions have got worse.

The main factors responsible for this deterioration are road surface quality (cited by 82% of those who said conditions had worsened; 76% in 2017), as well as litter (25%) and lane-marking visibility (23%; down from 31% a year ago).

As with local roads, it may be the increase in the number of motorists who think strategic road conditions have worsened in the past 12 months is as a result of the poor weather the country experienced in late 2017 and the first few months of 2018.

Unlike local roads, the strategic road network benefits from the Government's Road Investment Strategies which are five-year plans and associated funding allocated to maintain and develop the network. From 2020, taxes raised through vehicle excise duty will be ring-fenced to directly fund strategic road maintenance and development.

say the condition of strategic roads has worsened in the last 12 months

29% in 2017

82%

of those who said conditions on strategic road network have worsened believe the main factor responsible is road surface quality

2 The state of our roads

2.3 Congestion and journey times on all roads

Concern about congestion and slower journey times has fallen slightly this year: 24% of motorists say this is one of their top four concerns, down from 26% in 2017, while 6% say this is their top concern (8% last year).

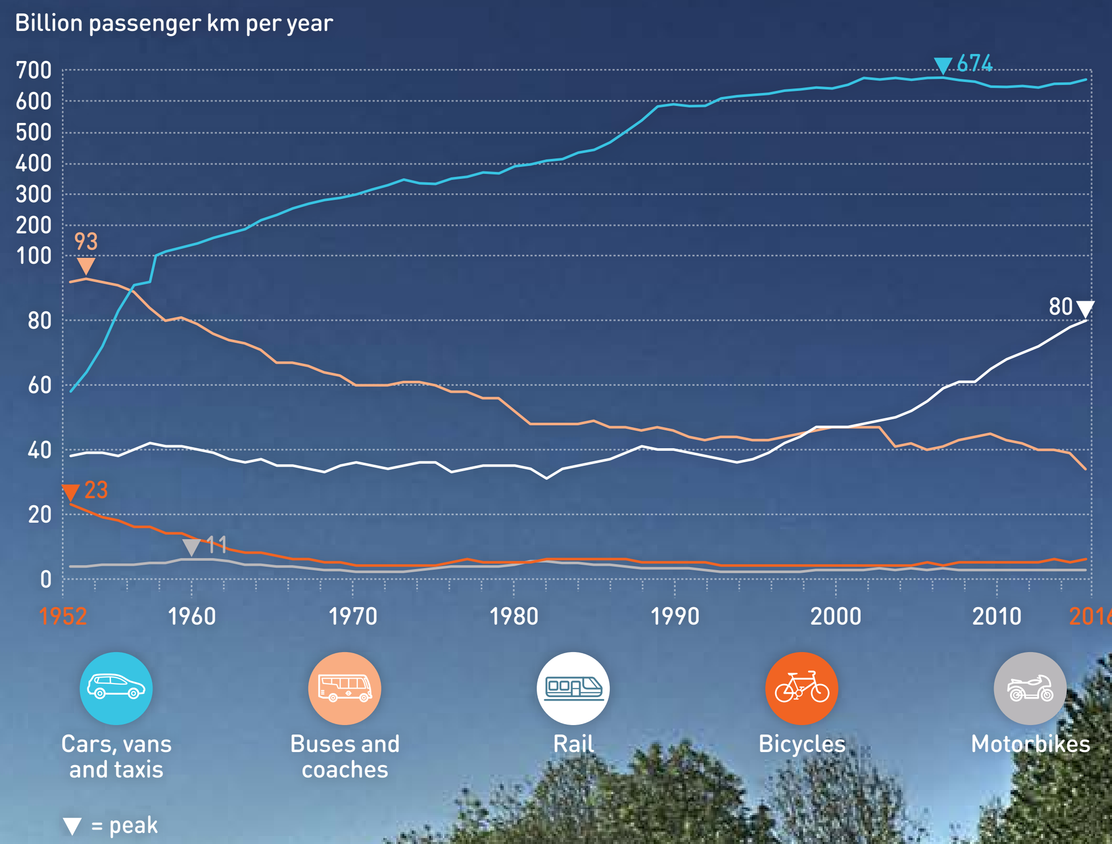
Nonetheless, there is strong agreement that both local journey times and those involving motorways and/or high-speed dual carriageways are becoming less predictable (71% agreement in both cases).

One of the reasons for this might be the fact private cars continue to account for the majority of journeys people make – and as data from the National Travel Survey shows, there has been a long-term reduction in the total distances travelled using other forms of transport, with only journeys by rail recently bucking this trend.

71%

agree local journey times are becoming less predictable. The same percentage (71%) think the same about motorways and high-speed dual carriageways

Road and rail travel since 1952



Source: Department for Transport statistics: Modal comparisons – Table TSGB0101

3

The dangers on our roads

Motorists unquestionably face many dangers at the wheel, but research for this year's Report very clearly reveals their greatest safety concerns centre on the actions of other drivers. >

Page 46 Mobile phone use: concern vs compliance »

Page 49 Drink- and drug-driving »

Page 50 Speed limits and speed awareness courses »

Page 53 Traffic law & the Highway Code »

3 The dangers on our roads

In the 2018 Report on Motoring, five of the top 10 causes for concern among motorists relate to the dangerous or reckless behaviour of other drivers.

Chief among these remains the use of handheld mobile phones at the wheel, and this is the second most widely reported overall concern, behind only the state of local roads. For the first time this year, motorists were also asked their views on the aggressive behaviour of other drivers: almost three in 10 (28%) said this was a major concern, ranking the issue fourth overall.

Drink- and drug-driving, as well as general lawbreaking by other motorists, also ranked in the top 10 concerns with worries about drink-driving specifically appearing to have increased.

Unfortunately, however, there is no evidence the use of handheld mobile phones among motorists over the last 12 months – whether to make calls, or to send or receive messages – has fallen. This is despite the recent introduction of stiffer penalties for this offence and the large volumes of media coverage around the issue.

Just as worrying is the proportion of motorists who say they have driven while over the legal drink-drive limit which has risen to its highest level in several years.

Policymakers looking to address these issues should note there have been statistically significant increases both in the percentage of motorists who believe there are not enough police on the road to enforce driving laws (68% in 2018, up from 62% last year) and the proportion who think they are not very likely to get caught if they break most motoring laws (28% from 24%).

Nevertheless, for the second consecutive year, motorists say their compliance with speed limits has improved, while questions relating to speed awareness courses for drivers who are caught exceeding the limits suggests there is a belief that this kind of training can be effective in reducing the number of repeat offenders.

1988 Flashback

When asked in 1988 what safety features motorists would particularly look for the next time they bought a car, 29% said rear seatbelts and 27% anti-lock brakes – the most popular answers by far.

"We know there is widespread concern about general levels of policing – indeed, it was a major issue at last year's General Election. But there are certainly far fewer dedicated road police today than at the start of the decade."

DAVID DAVIES
Executive Director
Parliamentary Advisory Council for Transport Safety (PACTS)

RAC call to action:
Handheld mobile phones: see page 82

3 The dangers on our roads

3.1 Mobile phone use: concern versus compliance

The percentage of drivers who say other motorists' use of handheld mobile phones is one of their four leading concerns has decreased only slightly in 2018, from 40% to 38%. This means the issue is now the second most common concern, behind the state of local roads.

The proportion of motorists who say handheld mobile phone use is their top concern has fallen from 16% to 13%.

While these differences may simply reflect the fact that other issues have risen in prominence over the past 12 months, the statistics in this year's Report relating to drivers' own reported handheld phone usage while driving make for somewhat grim reading.

25%

of motorists admit to making or receiving handheld calls while driving – this includes only 10% who say they do this rarely

While there has been no change in the proportion of motorists who say they make or receive handheld calls while driving – 75% never do this and a further 10% do this only rarely – there has been an increase (from 6% to 8%) in the percentage of drivers who say they make or receive calls most or all of the time if they are stationary with the engine running.

While last year, 87% of motorists said they never wrote texts, emails or social media posts while driving, this number has fallen to 84% in 2018. And although 86% of respondents this year say they never take photos or record videos with their phones while driving, this is a fall from 2017's 89%.

In March 2017, shortly before the research for last year's Report was carried out, the Government introduced tougher penalties for handheld mobile phone use while driving[6]. While the Government had already been consulting on stiffer penalties, media coverage of the findings in the 2016 Report on Motoring on the level of illegal phone use by drivers prompted them to bring forward their introduction and to set the new penalties at higher levels than suggested in the consultation proposal.

6. https://www.gov.uk/government/news/double-penalties-for-motorists-using-mobiles

Nature of mobile phone use while at the wheel

Making or receiving calls:

	Driving	Stationary
2018	25%	39%
2017	24% in 2017	40% in 2017

Check texts, email or social media:

	Driving	Stationary
2018	19%	40%
2017	18% in 2017	38% in 2017

Text, email or post on social media:

	Driving	Stationary
2018	16%	33%
2017	13% in 2017	29% in 2017

Take photos/videos with phone:

	Driving	Stationary
2018	14%	22%
2017	11% in 2017	16% in 2017

3 The dangers on our roads

The 2017 Report showed a welcome and not unsurprising increase in reported compliance – but, regrettably, it is now evident this did not mark the start of year-on-year reductions in illegal phone use among motorists.

Drivers were also asked for their views on the acceptability of handheld phone use at the wheel: here there has been little change in opinion over the past 12 months, suggesting those who were prepared to change their behaviour have done so but worryingly there is still a hard-core of drivers who have no intention of doing so.

This year, 16% say they think it is safe to text or check social media while stationary (15% in 2017), while 13% say it is acceptable to take a quick call on a handheld phone, up from 11% in 2017.

Clearly, there is still a need to convince those drivers who persist in using handheld phones while driving of the dangers of doing so, and for new technology to help those responsible for enforcement of the law on mobile phone use to detect their illegal use. Similarly, technology can help drivers stop using their smartphones when in a moving vehicle such as 'Do Not Disturb' or 'drive safe' modes.

13%

think it is acceptable to take a long call on a handheld phone while driving

"A possible explanation for the increase in reported drink-driving is the fact that people simply feel they are less likely to be caught: there are fewer police on the roads, and this is a crime that a camera cannot detect."

DAVID DAVIES
Executive Director
Parliamentary Advisory Council for Transport Safety (PACTS)

RAC call to action:
Drink-driving: see page 82

3.2 Drink- and drug-driving

Concern about drivers under the influence of alcohol has risen over the past 12 months: while the issue ranked in eighth place on the list of major concerns in 2017, cited by 24% of motorists, this year 27% of drivers identified it is as a major concern placing drink-driving in fifth place.

There has been a small but not statistically significant increase in concern about drug-driving (from 19% to 20%), and this ranks 10th for the second consecutive year.

Eight in 10 motorists (81%) say they do not think they have driven under the influence of alcohol over the past 12 months, down from 84% in 2017 but generally in line with the figures seen over the past four years.

However, there has been a statistically significant increase – from 8% to 12% – in the proportion of drivers who admit they have driven in the past 12 months when they think or know they were over the legal limit shortly after drinking.

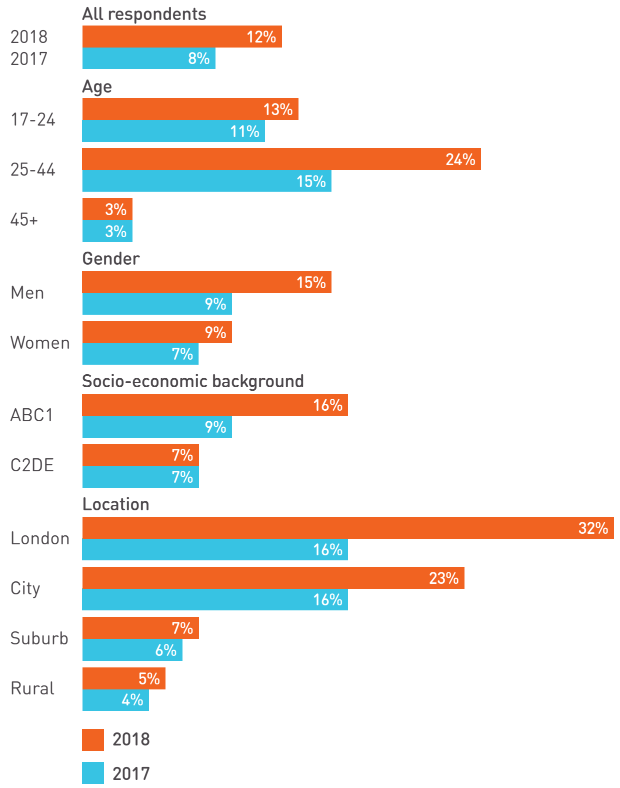
Motorists aged between 25 and 44 (24%) are more likely to admit to doing so than those in other age groups, while those who live in London (32%) or in other cities (23%) also have a greater propensity to drink-drive.

These points are significant and in some cases surprising given that younger drivers under 25 are often seen as more likely to drink and drive, and generally, city dwellers have better public transport alternatives to the car compared to those living in rural areas.

There has been no change since 2017 in the percentage of motorists (10%) who say they either know they have driven while over the limit the morning after a night out or think they have done so.

Driving under the influence

Motorists who know, or think, they have driven over the limit shortly after having drinks.



RAC call to action:
Driver re-training: see page 83

3 The dangers on our roads

3.3 Speed limits and speed awareness courses

For the second consecutive year, there has been a fall in the number of motorists who admit to speeding. The proportion of drivers who say they frequently or occasionally exceed 70mph on the UK's motorways has fallen to 57% in 2018, down significantly from 2017's 66% and the 70% in the two previous years.

Compliance on 60mph country roads (36% admit breaking limits) and 20mph urban area zones (39%) has also improved. However, there has been no change in reported speeding on roads with 30mph limits (39% say they occasionally or frequently exceed these limits).

There has been much debate about the effectiveness of speed awareness courses and how best to treat offenders, so this year's Report on Motoring asked drivers for their views on both topics. A fifth (20%) of motorists told us they have been caught speeding on at least one occasion in the past decade.

Of this group, more than one-third (35%) have been caught multiple times. There has been a greater incidence of being caught speeding in the past 10 years for men (27%), drivers from higher income groups (24%) and, in particular, those who drive for business (37%).

"It is possible that the reduction in the proportion of motorists who say they exceed motorway speed limits is at least partly a result of the cameras that are being used for enforcement on smart motorways. Similarly, improved compliance in 20mph zones may also be the result of speed limits being enforced by technology."

SUZETTE DAVENPORT
Former Chief Constable, Gloucestershire Police, and National Lead for Roads Policing in England and Wales

Three-quarters (76%) of drivers say they were caught on the most recent occasion by a speed camera – most commonly a mobile speed camera (42% of those caught by a camera) or a fixed speed camera on a road other than a motorway (35%).

Across the country, the proportion who say they were caught most recently by a police officer was 23%, but this rises to 39% in London and 35% in other urban areas.

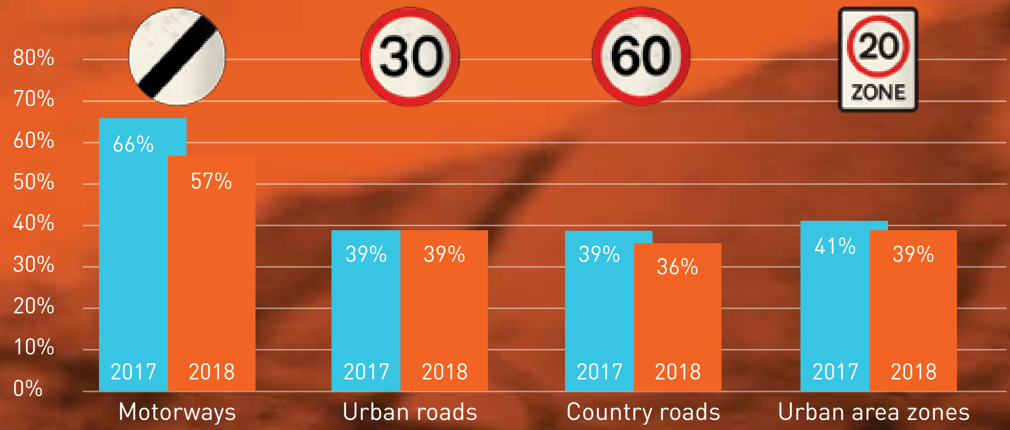
However, it is likely many of these officers will have been using approved handheld or vehicle-mounted equipment to measure the speed of offending motorists.

Almost half (47%) of speeding motorists say they chose to attend a speed awareness course on the most recent occasion they were caught.

1998 Flashback

In 1998, the Report found strong support for certain road safety improvements: there was +45% net support – the difference between the proportion that supported the measure versus those against it – for 'a 20mph speed limit in built-up areas and safer conditions for cycling and walking'.

Percentage of drivers who frequently or occasionally speed



3 The dangers on our roads

Overall, 77% of motorists caught speeding since 2008 chose to attend an awareness course: among this group, 48% say they have not deliberately broken the speed limit since, while a further 44% say they have slowed down – although they do still speed occasionally. However, a third of drivers (33%) who have attended speed awareness courses in the past 10 years say they have been caught speeding since.

There is a reasonable level of support for the concept of speed awareness courses: 38% of all motorists think they are a good idea, while 26% believe all drivers – not just those caught speeding – should be required to attend such a course. Only 14% believe they do not challenge speeding behaviour.

These findings complement those of a report published by the Department for Transport in May 2018[7]. The analysis of speed awareness courses in England and Wales between 2012 and 2017 indicated such training 'has a larger effect in reducing speed reoffending than the penalty points and fine associated with fixed penalty notices'.

Which of the following statements best represents your view on road traffic enforcement cameras for various infringements other than speeding offences?

7. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/706208/national-speed-awareness-course-evaluation.pdf

RAC call to action:
Enforcement of traffic offences: see page 82

3.4 Traffic law enforcement and the Highway Code

In this year's Report, motorists were asked about their experiences of receiving fixed penalty or penalty charge notices, after being caught by a traffic enforcement camera, for transgressions other than speeding offences: 27% of drivers say they have been caught at least once since they obtained their licence.

The most common transgression is driving in a prohibited bus lane (16%), followed by going through a red light (12%) and stopping in a yellow box junction (also 12%).

According to data compiled by the RAC in April 2018, more than 1.1m penalty charge notices were issued for drivers' misuse of bus lanes in the UK's 20 largest cities over the course of 2017. We have now called for a review of national signage guidelines as well as for the introduction of smart bus lanes to make it clearer to motorists when they can and cannot use bus lanes.

It should be pointed out the April RAC research related solely to penalty charge notices, which are usually issued by local authorities – it did not cover the fixed penalty notices issued by the police.

Despite the large number of associated penalties issued, the Report concludes there is a fair level of support for traffic enforcement cameras among motorists: almost half (48%) of motorists say they are necessary to reduce lawbreaking – a view that is more likely to be held by Londoners (61%) or those in the North West of England (60%).

RAC call to action:
Highway Code: see page 83

3 The dangers on our roads

Finally, the 2018 Report also asked motorists how recently they had consulted the Highway Code. Road safety campaigners often call for changes to the Highway Code, but clearly such changes cannot be fully effective if motorists are not aware of them.

Our findings suggest a relatively small proportion of motorists update their knowledge of the Highway Code with any regularity: 38% of drivers say they have consulted it within the last five years and less than half (49%) have done so in the last decade.

At the same time, there is strong support for regular mandatory checks on drivers' knowledge of the Highway Code: 56% of motorists believe drivers should at the very least be required to demonstrate they understand the 'rules of the road' regularly, most commonly agreeing every time they renew their licence, which would mean every 10 years for drivers under the age of 70.

61%

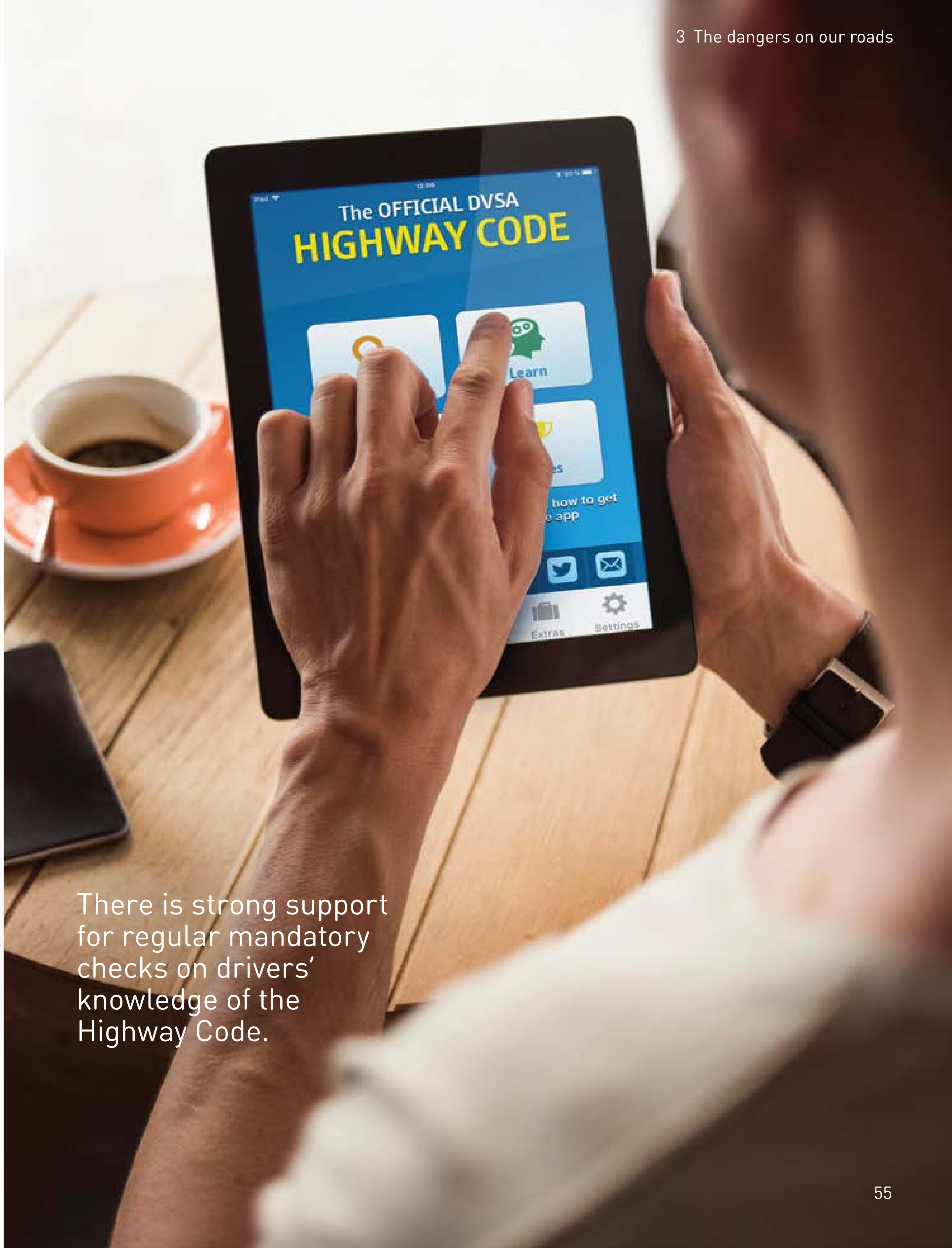
of London motorists say traffic enforcement cameras are necessary

56%

believe drivers should be required to demonstrate the rules of the road regularly

"I am surprised that as many as 38% of motorists have consulted the Highway Code within the last five years. I would have imagined that the overwhelming majority of drivers last consulted the Code when they were about to take their driving test."

MIKE QUINTON
Chief Executive,
IAM RoadSmart



There is strong support for regular mandatory checks on drivers' knowledge of the Highway Code.

4

Air quality and the environment

The harmful effects of vehicle emissions – in particular nitrogen dioxide from diesel engines – have again been widely reported in the media over the past 12 months. >

Page 58
Local air quality concerns »

Page 62
Policies to tackle pollution »

4 Air quality and the environment

Both central and local government are now proposing, and in some cases implementing, measures to tackle air quality problems, especially in urban areas.

This year's Report on Motoring shows that while worries about air quality and the environment rank well below issues such as the state of roads, irresponsible driving and the cost of motoring, concern has increased in the past 12 months.

While only 12% of motorists say the environmental impact of motoring is one of their top-four concerns this year, this is a clear rise on 2017's 9%. Similarly, 9% now say the impact of harmful diesel emissions on health is a major concern, up from 7% in the previous Report.

When asked specific questions about the effect of motoring on the environment, there has been a clear increase in concern about the impact vehicles have on local air quality. Despite this, a majority of motorists believe diesel drivers are being unfairly targeted by the Government as a key source of air pollution, as was the case a year ago.

A significant proportion of drivers say they are willing to make changes to their own behaviour in order to reduce their emissions footprint, and this year's Report has also asked motorists about which, among a range of potential policies, they believe would have the greatest impact on improving air quality, and which policies they would most like to see introduced.

4.1 Local air quality concerns

Although the environmental impact of motoring ranks in 16th place on the list of the top 20 concerns put to drivers in the 2018 Report – and the harmful effects of emissions from diesel vehicles on health ranks 19th – almost half of drivers (44%) say their concern about the impact vehicles have on local air quality has increased in the past 12 months (40% said this in 2017).

Drivers of diesel vehicles are the least likely (36%) to say their local air quality concerns have increased over the past year, while among owners of low-emissions vehicles such as plug-in hybrid or pure electric cars, concern is not surprisingly the highest (65%).

For this year's Report, drivers were asked what changes to their motoring behaviour they would be willing to make – or have already made – in order to reduce their own impact on the environment.

44%

of drivers say they are more concerned about the impact vehicles have on air quality in the area where they live than they were 12 months ago

Unsurprisingly, the greater the personal financial cost of any change, the less support it is likely to receive. The changes that motorists say they are most likely to have made already are switching off their engines more often in traffic (25% of drivers already do this, though they may have stop-start technology engaged), and walking or cycling rather than driving on short journeys (19%).

More than half of drivers (56%) say they would welcome understanding more about their own vehicle's impact on air quality, while the same proportion say they would buy a zero emissions car if the Government increased the financial incentives to do so (see Chapter 5 for more information about drivers' views on such incentives).

69%

agree the Government needs to develop a website that allows any driver to check how polluting their vehicle is, based on its Euro emissions rating

1998 Flashback

The Report on Motoring found in 1998 that the environmental damage caused by the car was 'well understood but seen as a less significant contributor to environmental problems than many other sources'. 'However,' the Report continued, 'old cars in particular are seen as highly polluting.'

4 Air quality and the environment

More than four in 10 drivers (42%) are willing to switch off their engines more frequently while stationary in traffic, and the same percentage would share a car with a friend or colleague in order to improve local air quality – findings which may be useful to local authorities.

Those who are willing to walk or cycle rather than drive short journeys outnumber those unwilling to do so (31% willing while 28% are unwilling). But when asked about their willingness to buy a zero-emissions vehicle if there are no financial incentives to do so, those unwilling outnumbered those willing (23% are willing against 30% unwilling).

The least popular behavioural change of the options was paying a charge to enter a city centre as part of a plan to improve local air quality: only 22% would be willing to do so, while 40% are unwilling.

London will introduce an Ultra-Low Emission Zone in 2019

Birmingham, Leeds, Southampton, Nottingham, Derby, Bristol, Cambridge and Oxford have announced plans to introduce Clean Air Zones in England. And in Scotland, Glasgow and Edinburgh have drawn up plans and Dundee is expected to follow.

Willingness to reduce personal emissions footprint

56% of motorists are willing to buy a zero emissions vehicle if the Government increased the financial incentive to do so

56% of motorists want to understand more about how their vehicle's emissions impact on air quality

42% of motorists are willing to switch off their engines more often when in traffic to reduce their emissions footprint

42% of motorists are willing to share a car with a friend or colleague to reduce their emissions footprint

22% of motorists are willing to pay a charge to enter a city centre as part of a plan to improve air quality

31% of motorists are willing to walk or swap their car for a bicycle for short journeys to reduce their emissions footprint

23% of motorists are willing to buy a zero emissions vehicle even if the Government doesn't provide any financial incentives to do so

4 Air quality and the environment

4.2 Policies to tackle pollution

The proportion of motorists who believe the Government is unfairly targeting diesel drivers as a key source of air pollution remains high: 52% take this view (53% in 2017). Only 17% of motorists disagree with this statement.

Over the past four years, however, there has been a steady increase in the proportion of drivers who believe the current level of motoring taxation is a fair price to pay for the environmental damage motoring can cause. In 2018, 37% agree with this sentiment, up from 34% in 2017. A smaller proportion of motorists (28%) disagree with this viewpoint.

The 2018 Report presented motorists with a series of potential or existing environmental policies related to motoring to assess both the level of support for such measures and also drivers' views on how effective the policies could be in improving local air quality.

This information provides policymakers with a valuable insight into which proposals are likely to have both a significant level of public backing and high perceived benefit.

Three policies in particular appear to fall into this category: a ban on older, more polluting vehicles from entering areas with the poorest air quality is favoured by 31% of motorists, while 47% believe this would cut pollution. Similarly, the introduction of charges for more polluting vehicles entering such areas is supported by 30%, while 45% would expect this policy to be effective.

Enforcing 'no-idling' zones – where drivers are required to switch their engine off in traffic or when stopped – has slightly lower support (27%), however a high proportion (40%) believe this will have a high impact on reducing pollution.

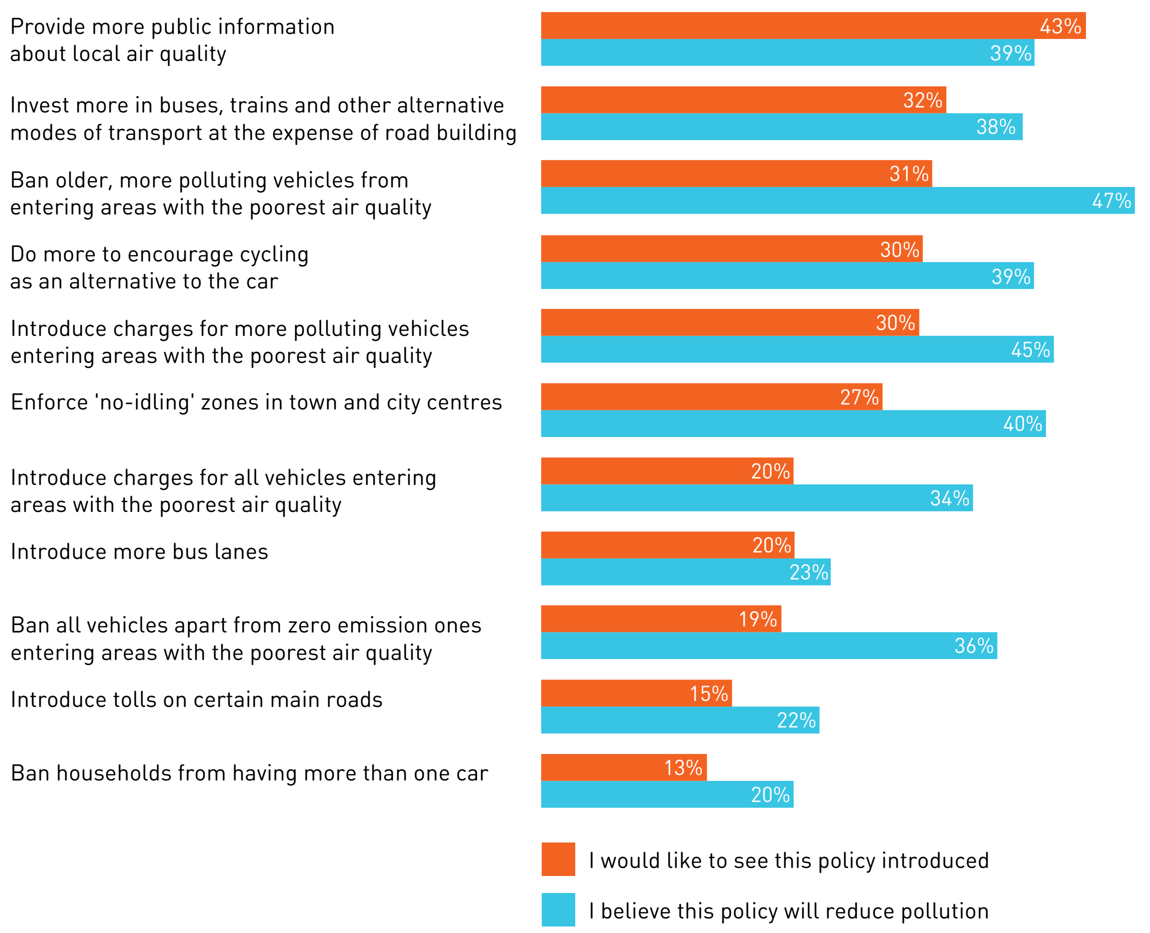
2008 Flashback

Two-thirds of motorists in 2008 agreed that taxing a vehicle based on CO_2 emissions was, in principle, a good thing. But the Report found that drivers' understanding of the emissions generated by different fuel types was 'somewhat confused'.

RAC call to action:
Local measures to improve air quality: see page 81

Motorists also support providing more public information about local air quality (43%) but fewer (39%) believe it would be effective in reducing pollution. Policies aimed at reducing how much motorists drive their cars are also seen as relatively effective: investing more in public transport at the expense of road building (supported by 32% and 38% believe it would be effective in reducing pollution) and doing more to encourage cycling as an alternative to a car (supported by 30% and 39% believe it would effectively reduce pollution).

Policies that could be implemented to improve local air quality



4 Air quality and the environment

A lower percentage (19%) would support a ban on all traffic with the exception of zero emissions vehicles from areas with poor air quality, but 36% say this would improve local air quality.

Policies motorists perceive likely to be less successful include the introduction of charges for all vehicles in areas with poor air quality (only 20% would like to see this measure introduced although 34% think it would be effective), the introduction of additional bus lanes (20% support, 23% think effective), introducing tolls on certain main roads (15% support, 22% think effective) and, least popular, is limiting household car ownership to a single vehicle (13% support, 20% think effective).

The findings outlined above suggest a significant proportion of motorists believe a number of the clean-air zone or low-emissions zone policies being considered in major UK cities are likely to be effective.

While there appears to be a good degree of support for policies to improve air quality we have to balance this with the latest evidence which suggests car use is increasing.

However, as we explain in the next section of this Report, drivers are asking for more information to be made available, in particular with regard to establishing the emissions rating of any vehicle.

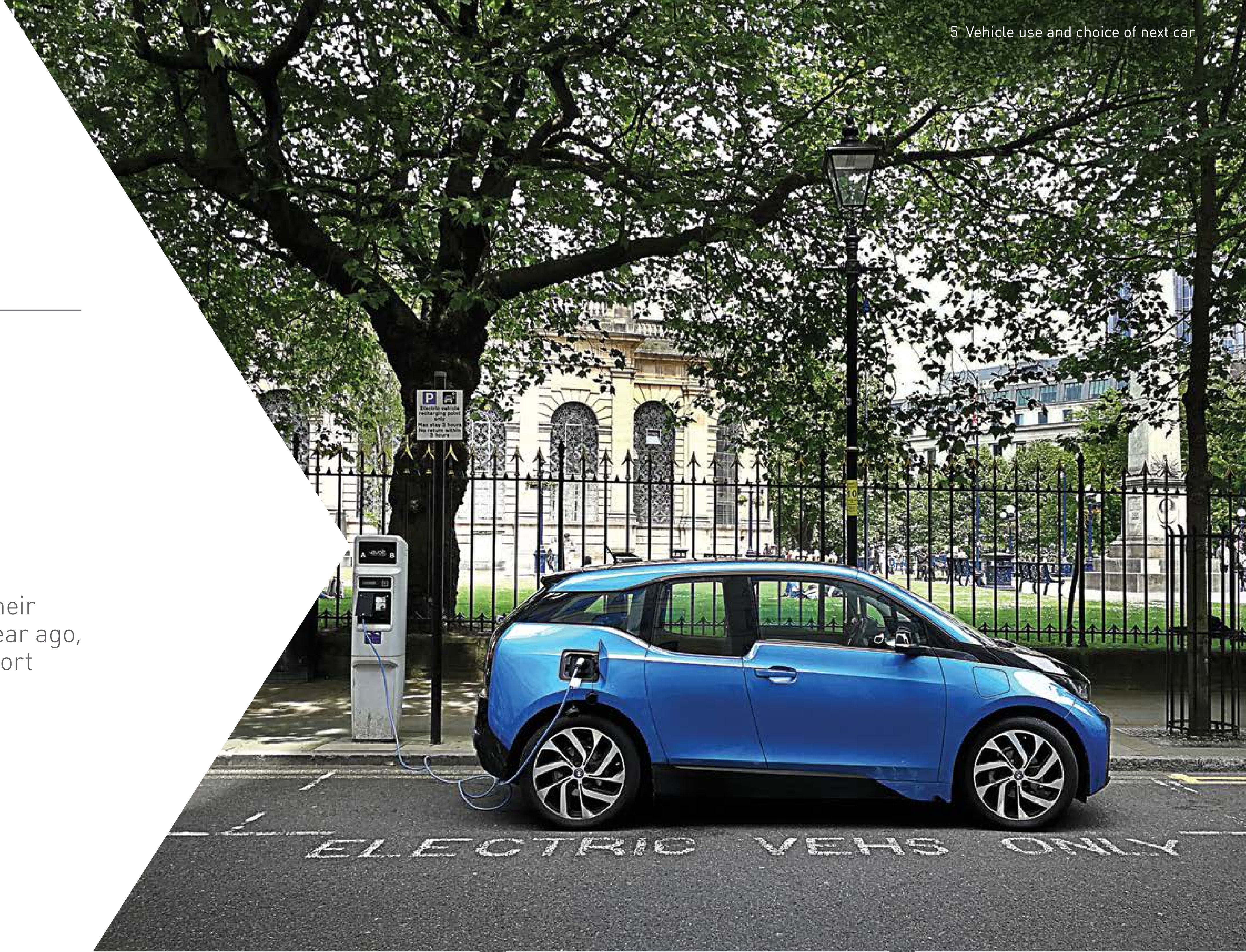
2008 Flashback

According to the 2008 Report, more than two-thirds of motorists said they would buy a more environmentally friendly car if the tax incentives were better, while half said they considered CO_2 emissions carefully when buying a new vehicle.

5

Vehicle use and choice of next car

Britain's drivers are using their cars more than they did a year ago, research from the 2018 Report on Motoring reveals. >



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Car use rising, not falling »

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Choice of next car: a confusing picture »

5 Vehicle use and choice of next car

For the first time in several years, a greater proportion of drivers (27%) say their vehicle use has risen over the past 12 months than say it has declined (18%). A significant number of those whose car use has increased say this is in response to worsening public transport services in their areas (24%).

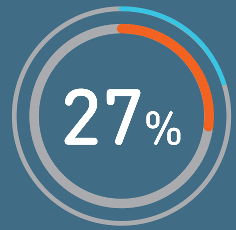
The car is by far the most popular mode of transport when it comes to commuting for those in paid employment, and taking children to school for those with school-aged children. Indeed 82% of those who take their children to school by car say they also use their car to get to work.

When asked about what type of car they would choose as their next vehicle, motorists admit to a considerable degree of confusion. Two-thirds of drivers (66%) say they are confused about whether to choose a petrol, diesel or an alternatively fuelled car as a result of media coverage of proposals aimed at improving air quality.

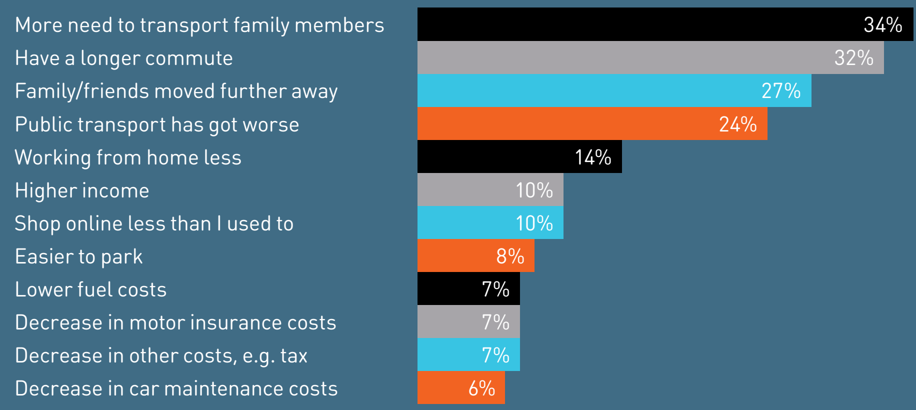
Following the Government's announcement in summer 2017 that new diesel and petrol cars would no longer be sold from 2040, this year's Report asked motorists for their views on electric vehicles. Almost three-quarters (73%) say pure electric cars would have to be priced at the same level or less than diesel or petrol equivalents before they would consider buying one, and just under half of motorists (49%) do not expect to purchase a pure electric vehicle in the next 15 years.

They use their motor vehicle more because...

Percentage of motorists who say they are using their car more than 12 months ago



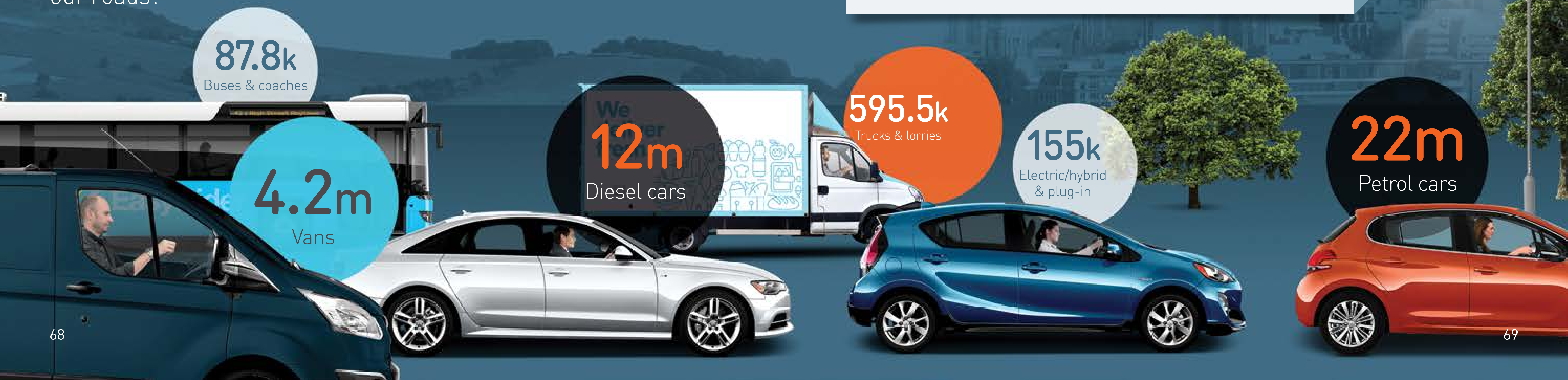
20% in 2017



"There was a drop in car usage levels during the last recession, but the rate has increased steadily since then and the figures in this year's Report are not a surprise. Certainly, this is clear evidence that we have not reached 'peak car'."

DAVID LEIBLING
Transport and Motoring Consultant
Founder of the Report on Motoring

What's on our roads?



5 Vehicle use and choice of next car

5.1 Car use rising, not falling

In 2018, 27% of motorists say they are using their vehicles more than 12 months ago while only 18% say their use has declined since last year. This is the first time in four years the former group has outnumbered the latter – a net increase of 9%.

By comparison, in 2017, only 21% said their vehicle use had increased over the previous year while 24% said it had declined. In 2018, a third of drivers (33%) also say they feel more dependent than 12 months ago on their car, compared to 27% last year.

Worryingly, 25% of 17 to 24-year-olds and 22% of newer drivers saying they are 'much more dependent' on their car (compared to 14% of all motorists) – this is a serious concern.

The most common reasons drivers say their car use has risen since 2017 include an increased need to transport family members (34%), longer commutes (32%) and family or friends being further away (27%). But more interestingly, a quarter of this group (24%) say they are driving more due to a deterioration in local public transport services.

Of this group – a cohort that represents 2.6m UK motorists – 44% say the problem is poorer public transport reliability, 39% blame higher fares and 33% say it is due to cuts to the number of their local services (respondents were allowed to cite more than one factor). Department for Transport figures indicate traffic volumes increased in 2017 by 1.3% when compared to 2016[8].

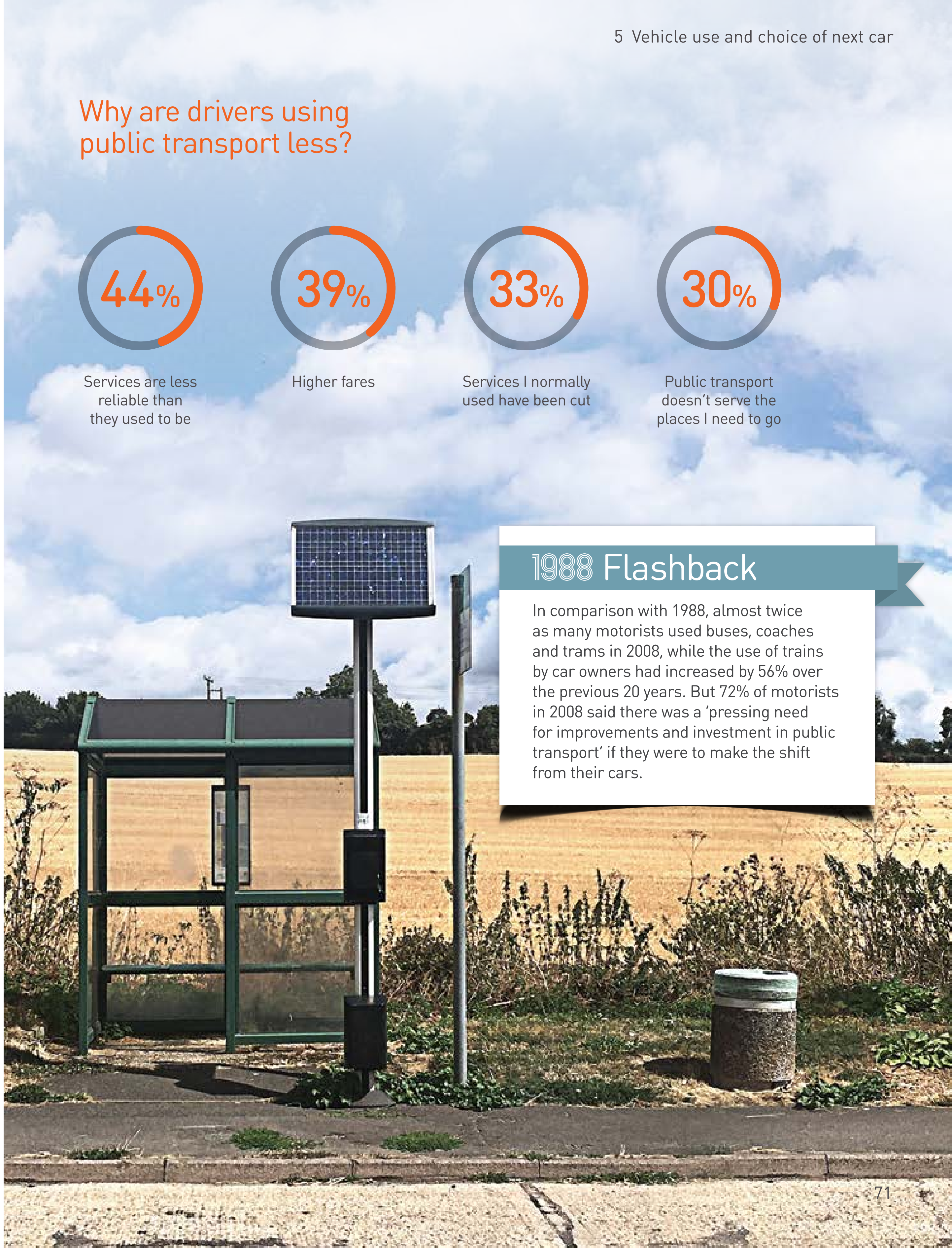
The research for this year's Report was completed two days before the new rail timetables were introduced on some networks and parts of the rail network descended into meltdown so it is possible that respondents would have been even more critical of the reliability of public transport, had they responded a few weeks later.

The chart to the right illustrates some of the key reasons why drivers say public transport does not represent a viable alternative.

"In many rural areas, bus services have been scaled back dramatically over the past 10 years, often as a result of local authority cuts. In many cases, if there is no longer a reliable bus service, the only alternative is to cycle or, more likely, use a car."

STEPHEN JOSEPH
Former Chief Executive
Campaign for Better Transport

8. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/722302/road-traffic-estimates-in-great-britain-2017.pdf



Why are drivers using public transport less?

44% Services are less reliable than they used to be

39% Higher fares

33% Services I normally used have been cut

30% Public transport doesn't serve the places I need to go

1988 Flashback

In comparison with 1988, almost twice as many motorists used buses, coaches and trams in 2008, while the use of trains by car owners had increased by 56% over the previous 20 years. But 72% of motorists in 2008 said there was a 'pressing need for improvements and investment in public transport' if they were to make the shift from their cars.

5 Vehicle use and choice of next car

In July this year, a Report published by the Campaign for Better Transport[9] found local authority funding for bus services in England and Wales had been cut by 45% since 2010/11, with more than 3,000 routes altered, reduced or withdrawn since the start of the decade.

Of the 18% of all motorists who say they use their vehicle less in 2018 than they did a year ago, the most common explanation is a shorter commute (28%), while 22% cite higher fuel costs. It is worth noting 20% of those whose use has declined say it is at least partly due to improvements in local public transport.

When asked about travelling to work, 62% of motorists who are employed say their car is their main mode of transport. For this group, the most common feasible alternative is a bus service (32%). The second most popular main mode of commuting is walking, although this represents just 13% of all motorists in paid employment.

Cars also remain very popular on the school run. Department for Transport figures for England show that 35% (or 2.5m) of school-aged children (five to 16 years) are taken to school by car – the figure is 44% for children aged five to 10, and 25% for children aged 11 to 16 years.

While a third (30%) of drivers say walking is their usual way of taking children to school. Six in 10 (61%) of motorists with school-aged children say the car is their primary means of taking children to school, although this group would obviously include those who then also drive to work.

Interestingly, 82% who use their car for the school run also use it to get to work which suggests the ability to drop their children off at school on the way to work is one of the key factors in the decision to use their car. It also suggests for these parents, switching to alternative modes such as walking, cycling or public transport, would be difficult.

"Looking at the figures that show a high proportion of school journeys are made by car, a key factor is likely to be the parent's onward journey: if they are going on to work or to do some shopping, it may make more sense to use the car rather than walk and this seems to be borne out by the figures."

GEMMA BRAND
Head of Statistics
Roads and Freight, Department for Transport

9. http://bettertransport.org.uk/media/02-july-2018-buses-in-crisis-report-2018

Source: National Travel Survey 2017 – Table NTS0613

5 Vehicle use and choice of next car

5.2 Choice of next car: a confusing picture

Media and political coverage of the environmental impact of motoring – much of it related to policies introduced by central and local government to tackle poor air quality – has made motorists' decisions over what car to buy next particularly difficult, this year's Report has found.

Two-thirds of motorists (66%) say they are confused about whether their next car should be petrol, diesel, hybrid, electric or alternatively fuelled because of the headlines around vehicle emissions and air quality. However, given that a further 26% are unsure as to whether they are confused, the overall level of confusion is higher than the 40% would suggest (total level of confusion is 66%)!

And, almost seven in 10 of motorists (68%) say they are confused about whether or not new diesel cars are bad for the environment. But 42% of drivers say they would still consider buying a diesel car, against 39% who would not.

42%

would still consider buying a diesel car

Mixed messages about diesel vehicles appear to be among the key factors behind this confusion: many local authorities either have or are planning to introduce charges or restrictions on all but the latest diesels in urban areas due to the impact of their nitrogen dioxide emissions on air quality, while the transport secretary, Chris Grayling, made the point in June 2018 that diesel cars remain a 'perfectly sensible option' for many drivers[10], in particular given the role they can play in reducing carbon dioxide emissions.

Another factor in the confusion over diesels may be the different approaches local councils are taking to reduce pollution by proposing charges or restrictions on some diesel vehicles – private cars, vans and HGVs – entering certain urban areas. The primary contributors to nitrogen dioxide emissions in areas with poor air quality vary from city to city depending on the mix and volume of local traffic and the extent to which sources other than road traffic are contributing to the problem. Not surprisingly therefore, different cities may apply different measures to achieve the required improvement in air quality. However, this only creates uncertainty and confusion for the current or prospective owners of diesel cars who want to know how such restrictions will affect them.

10. https://www.motoringresearch.com/car-news/diesel-valuable-role-chris-grayling-mp/

2008 Flashback

In 2008, the vast majority of motorists – 92% – held the view that drivers in the UK had become more dependent on their cars and more car-focused than in 1988.

Confusion about next car purchase

66% confused

I am confused about whether my next car should be a petrol, diesel, hybrid, electric or something else given all of the headlines around vehicles and air quality

30% not confused

68% confused

I am confused about whether new diesel vehicles are bad for the environment or not

29% not confused

RAC call to action:
Online emissions look-up: see page 81

5 Vehicle use and choice of next car

In this year's Report, motorists were asked whether the Government should develop a website that allows drivers to check how polluting their vehicle is, (i.e. to what Euro emissions standard their vehicle complies). This information can be hard to obtain, and only the manufacturer can give guidance with certainty for vehicles manufactured during the two-year transition period between Euro emissions standards.

Close to seven in 10 motorists (69%) say they would like to see a service introduced by which a vehicle's registration number can be entered to establish an accurate Euro emissions standard for the vehicle concerned: this is something the RAC has been calling for for nearly a year.

After falling to a low of 16% in 2017, the proportion of motorists who say they are most likely to buy a diesel as their next car, while still well below the 28% figure in both the 2015 and 2016 Reports, has actually risen slightly to 18%.

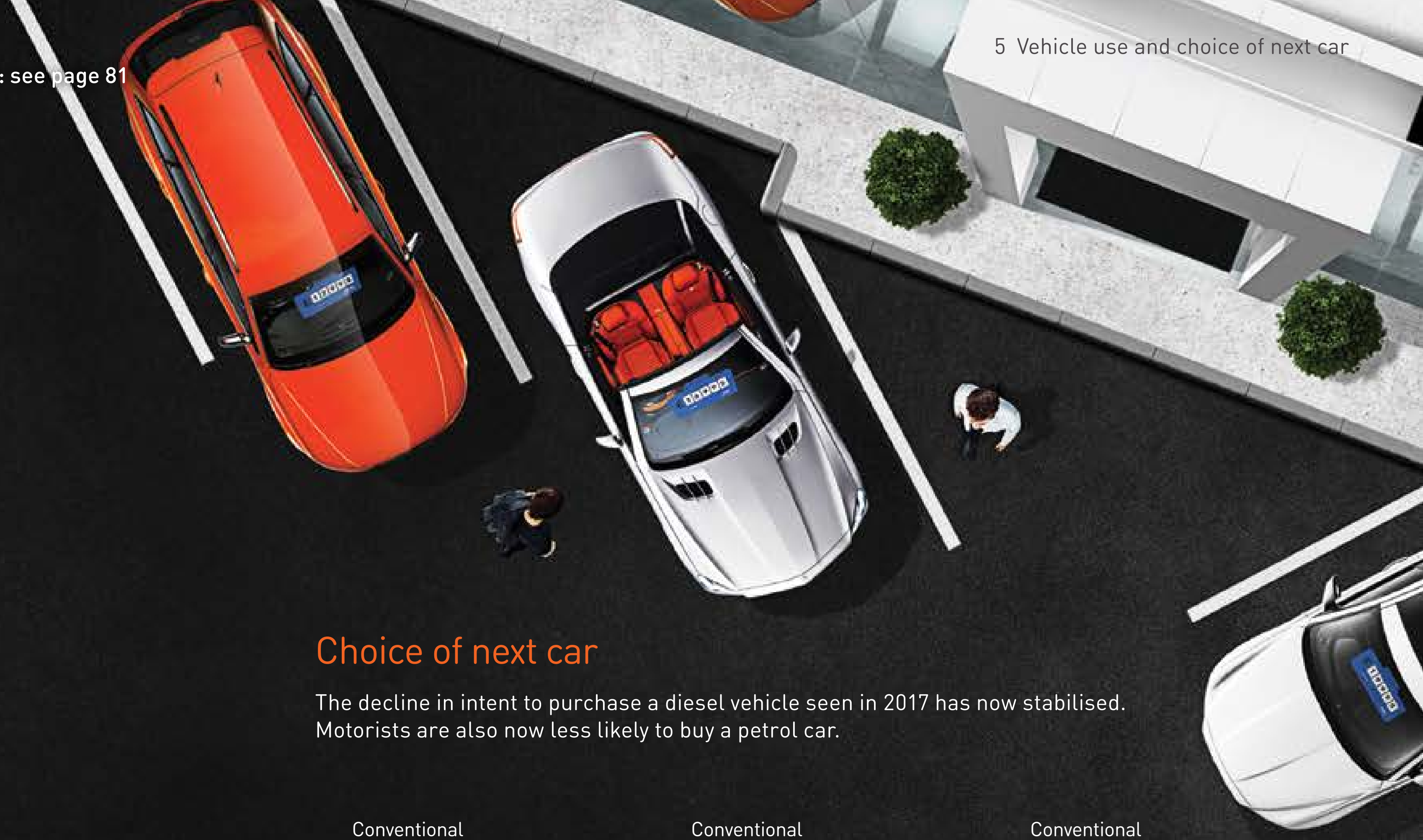
Frequent business drivers (28%) and current diesel owners (47%) are more likely to choose diesel next time.

Interestingly, petrol cars have declined in popularity as the likely choice of next vehicle, falling from 58% in 2017 to 52% this year, possibly because of the announcement that new petrol vehicles will no longer be sold from 2040. There has been only a very modest increase in the proportion of drivers who say their next car will be a conventional hybrid (17% against 15% in 2017), a plug-in hybrid or extended-range electric car (7% versus 5%) or a pure electric vehicle (3% versus 2%).

The 2018 Report asked drivers under what circumstances they would consider buying a pure electric car. In terms of price, 33% say electric vehicles would have to be at least 10% cheaper than the petrol, diesel or hybrid equivalent, while a further 40% would need prices to be no more expensive.

"It is a real problem that there is no central log of vehicle emissions data. But if local and central government are going to continue to introduce clean-air policies that are directly related to engine emissions levels, motorists need a clear and reliable source of information about their own cars."

DAVID BIZLEY
Chief Engineer, RAC



Choice of next car

The decline in intent to purchase a diesel vehicle seen in 2017 has now stabilised. Motorists are also now less likely to buy a petrol car.

Conventional diesel engine
18%
16% in 2017

Conventional petrol engine
52%
58% in 2017

Conventional hybrid engine
17%
15% in 2017

Plug-in hybrid vehicle or an extended range electric vehicle
7%
5% in 2017

Pure electric battery-powered vehicle
3%
2% in 2017

Hydrogen fuel cell vehicle
1%
2% in 2017

5 Vehicle use and choice of next car

Almost two-thirds (62%) of drivers say charging points away from home would have to be available within a maximum five-minute detour from their chosen route or destination.

In terms of vehicle range, two-thirds of drivers (67%) say they would require a minimum range of at least 300 miles before having to recharge, and half (50%) said the maximum time to fully recharge a vehicle mid-journey would need to be no more than 30 minutes. Just over a third (36%) see themselves buying a pure electric car within the next 10 years and 49% within 15 years.

These figures suggest we are still some considerable way from pure electric vehicles becoming the vehicle of choice for the majority of motorists and that further progress is needed on vehicle price and range, charging standards, and infrastructure, before they become so. They are clearly not yet the immediate route to 'zero emissions' motoring that some politicians believe them to be.

"This research suggests that while many people might welcome the local environmental benefit of zero-emission electric vehicles, the perceived limited range combined with the lack of convenient charging infrastructure and excessive time taken to 'refuel' compared to conventional combustion engine vehicles are real hurdles that need to be overcome before the public may consider widespread adoption.

"From personal experience, the complexity involved in dealing with a variety of different charging network providers and having to have individual cards for each one is a real disincentive to take-up. If there was a free national charging network the picture would be completely different! Or more realistically, why can't charging networks be accessed by a simple tap of a contactless bank card?"

MATTHEW AVERY
Director of Insurance Research,
Thatcham Research

"The majority of motorists appear to want pure electric vehicles with a minimum range in excess of 300 miles. This probably reflects a lack of confidence in the charging infrastructure. If drivers are uncertain whether they will be able to recharge their vehicle where and when they need to do so, they will demand ranges that make recharging en route unnecessary for all but the longest of journeys."

MIKE HAWES
Chief Executive
Society of Motor Manufacturers and Traders

6 Calls to action

Have your say:
#ROM2018
on Twitter

The RAC uses the results of its annual Report on Motoring survey to inform its campaigning activity and identify the key issues which matter most to motorists. Our 'calls to action' focus on the biggest of these concerns.

Cost of motoring

Fuel duty: The cost of fuel continues to be a major concern for drivers and an increase in duty would have a detrimental effect on economic growth. The RAC reiterates its call to the Government not to increase fuel duty for the entirety of this Parliament, giving motorists and businesses further clarity and certainty on costs.

The increasing uptake of ultra-low carbon vehicles will result in a longer-term decline in Treasury revenues from fuel duty and the RAC calls on the Government to lead a public debate on how best to restructure motoring taxation in a way that is fair to road users and maintains Treasury revenues.

Insurance Premium Tax (IPT): The RAC urges the Treasury to freeze IPT for the remainder of this Parliament as insurance costs continue to be a top concern for motorists. The RAC also calls on the Government to reduce the IPT rate for those younger drivers who take up telematics 'black box' insurance policies.

State of the roads

Local roads: The condition and maintenance of local roads is the top concern for motorists in 2018. The vast majority of all journeys begin and end on local roads and their upkeep is essential to the UK's economic health and to minimise safety risk and costs for all road users. The RAC believes the Government should develop a long-term strategy to bring local roads back to a state that is fit-for-purpose over an agreed period of between five and 10 years, and that the Treasury should ring-fence additional funds for this. The RAC estimates that ring-fencing 2p from the existing 57.95p fuel duty paid by motorists on every litre of fuel purchased over 10 years would earmark £9.4bn for local roads – enough, according to the recent survey of councils conducted by the Asphalt Industry Alliance, to largely eliminate the maintenance backlog on roads in England and Wales.

Major roads: There has been a sharp rise in the number of motorists who believe the condition of the strategic road network has deteriorated over the last 12 months. We urge Highways England to re-examine the criteria it applies to determine when preventative maintenance is required and to put in place processes capable of responding more rapidly to fix surface defects when they arise following periods of extreme weather.

Air quality and the environment

Local measures to improve air quality: With local authorities across many towns and cities drawing up plans for Clean Air Zones, we continue to encourage authorities to prioritise targeting the most polluting vehicles covering the most miles in urban areas. We strongly urge authorities to adopt an evidence-based approach when creating measures for diesel vehicles. For example, we would discourage local authorities from implementing parking surcharges for diesel vehicles as there is no evidence of their effectiveness.

We also call on local authorities to publicise and enforce anti-idling measures that encourage drivers to switch off their engines when stationary.

Online emissions look-up: With many local authorities developing plans for the introduction of Clean Air Zones in areas with poor air quality, it is essential that individuals and businesses have access to a database which allows them to look up the Euro emissions standard for any vehicle by entering registration details. The RAC calls on the Government to develop and introduce such a system as a matter of urgency.

Cleaner vehicles

Vehicle choice: Given the confusion among motorists and businesses highlighted in the Report over the best environmental choice for their next vehicle, both to improve air quality and reduce carbon dioxide emissions, the RAC calls on the Government to:

- Maintain a technology-neutral position recognising that one technology solution will not offer the best option for all user requirements.
- Recognise that an adequate charging infrastructure across the UK is a pre-requisite for mass-market take-up of pure electric vehicles and that common standards for recharging of electric vehicles are needed before stakeholders will have the confidence to invest in mass recharging facilities.
- Include road user representation in all initiatives aimed at accelerating progress on the Government's 'Road to Zero Strategy' which aims for at least half of new cars to be ultra-low emission by 2030.
- Follow the lead given by Norway and create more attractive financial incentives to switch to ultra-low emissions vehicles, such as reduced VAT rates for new zero-emission vehicles. The Government should also reintroduce worthwhile reductions in vehicle excise duty rates in years two to five for plug-in hybrid and extended-range electric vehicles.

6 Calls to action

Have your say:
#ROM2018
on Twitter

Fair motoring

Enforcement of traffic offences: The RAC encourages the Government to review the guidance given to local authorities on the implementation of bus lanes and particularly on signage requirements where bus lanes operate. More generally, we call on the Government to review the penalty charge notice system for certain 'moving' traffic offences, such as driving in bus lanes and through bus gates, and to consider promoting tiered penalties where first-time offenders are issued with a lower than standard penalty.

Road safety

Handheld mobile phones: The RAC remains concerned by the stubbornly high level of handheld mobile phone use evident in this year's Report on Motoring despite the introduction of stiffer penalties in 2017 and enforcement campaigns initiated by the National Police Chiefs' Council.

We urge the Government to continue investing in high-level public awareness campaigns to highlight the dangers and to give further consideration as to how new technology can assist in enforcement. We also encourage police forces across the UK to step up the number of high profile enforcement campaigns so there is a greater probability that motorists will be caught if they flout the law on handheld mobile phone use.

Drink-driving: The number of motorists admitting to driving over the limit immediately after drinking appears to have increased. The RAC calls on the Government and police forces to continue communicating the dangers and that enforcement is given sufficient priority so that offenders can expect to get caught. The UK Government should also reconsider reducing the blood alcohol limit to 50mg/100ml.

Driver re-training: Recent findings have demonstrated that drivers caught speeding who attend speed awareness courses are less likely to reoffend than those who do not. Research for this year's Report also shows that 90% of those who have attended such courses claim to have reduced their speed. The RAC therefore calls on the Government to consider making attendance on courses for those caught speeding and similar offences compulsory for first time offenders.

Highway Code: Few drivers appear to update their knowledge of the Highway Code with any regularity. There is majority support for drivers being required to demonstrate a knowledge of the Highway Code every 10 years as part of the process of renewing a driving licence and the Government should consider the cost/benefit case for introducing such a process.

Roadside safety: The recent fatal accident involving an RAC patrol working at the roadside and other accidents involving roadside technicians have served to re-emphasise the dangers to vehicle occupants and roadside assistance providers at the scene of a breakdown. The RAC calls on the Government to introduce guidance in the Highway Code to encourage drivers to 'slow down and move over' if it is safe to do so when approaching a broken-down vehicle. The RAC also calls on all stakeholders to work together to further improve red-X compliance, particularly on smart motorways, and for Highways England to consider further reducing the distance between emergency refuge areas on new smart motorways.

Join the debate today

Follow the conversation on Facebook and Twitter:

RAC
on Facebook

@TheRAC_UK and @RACPress
on Twitter

Share your thoughts directly with us, use #ROM2018 on Twitter

7 Our campaigns

The RAC works hard to make motoring a better experience. Here are just a few examples of how we're making UK driving fairer, safer and more affordable.

RAC Fuel Watch

RAC Fuel Watch is the RAC's fuel price monitoring initiative. We monitor both wholesale and retail fuel prices daily to make sure retailers are charging motorists a fair price on the forecourt. In times of falling wholesale prices we use this information to call on retailers to pass on savings at the pump. This regularly leads to retailers reducing the price of petrol and diesel, helping to keep the cost of motoring down for everyone.

RAC Fuel Watch

RAC Pothole Index

The condition of the UK's roads is always a top concern in the findings of the Report on Motoring. As a result the RAC decided to use its wealth of breakdown data to create a reliable method of monitoring the state of our roads – the RAC Pothole Index. This is done by tracking faults attended by patrols that could be attributed to potholes such as damaged shock absorbers, broken springs and wishbones, and distorted wheels, alongside rain and frost statistics. We use the findings from the RAC Pothole Index on a quarterly basis to highlight the scale of the problem as part of our campaign for better quality roads.

RAC Pothole Index

Be Phone Smart

Despite the penalty for using a handheld phone while driving being doubled in March 2017 to a £200 fine and six penalty points there remains a hard core of drivers who continue to flout the law. The RAC wanted to do more to help break this deadly habit so we launched Be Phone Smart – a campaign which encourages motorists to make a personal commitment not to use their handheld phone when at the wheel.

Be Phone Smart has the backing of a wide range of organisations and initiatives including the National Police Chiefs' Council, the Government's THINK! campaign, IAM RoadSmart, the Road Haulage Association, Road Safety GB and Transport Scotland.

Visit BePhoneSmart.uk

RAC Child Road Safety

The RAC thinks every child should know how to stay safe around roads and vehicles. To help spread the road safety message we worked with Aardman Animations to create Horace – our road safety mascot for the 21st century.

We are also working in partnership with The Scout Association to promote road safety education among the UK's 440,000-plus Beavers, Cubs, Scouts and Explorers and their 154,000 volunteer supporters to bring child road deaths to zero.

8 Our successes

Safer roads

Safer motorways: Representations by the RAC and other stakeholders to the Department for Transport and Highways England have resulted in new guidelines which will see more prominent and frequent emergency refuge areas (ERA) on new all-lane running motorways and better signage for drivers so they can see how far they are away from the nearest ERA. These new designs will be retrofitted to existing all-lane-running smart motorways in areas of greatest risk.

Driving standards: The RAC campaigned for learner drivers to be given the opportunity to have lessons on motorways under the supervision of approved driving instructors in a dual-controlled car, so we welcomed the Government introducing this in June 2018.

Better roads

Roadworks: The RAC has actively contributed to a working group targeting better managed roadworks to help reduce congestion and improve journey times. Highways England has trialled increased speed limits through roadworks on motorways with a view to a wider roll-out where safe to do so, improving the experience and reducing delays for drivers. At a local level, we welcomed plans to roll out lane rental schemes more widely where utility companies pay to use highways for the time their works take to complete as this should help to reduce congestion in urban areas.

Local roads: The RAC's Pothole Index is now widely quoted as an authoritative source on the condition of local roads. Our campaign throughout the spring highlighted some of the worst defects on our roads which, in turn, has led to an extra £100m being invested into the Government's Pothole Fund. However, the real solution to better local roads lies with a long-term strategy and ring-fenced funding.

Our public consultation responses can be found at:
media.rac.co.uk/documents

Lowering the cost of motoring

Fuel prices: RAC Fuel Watch, which monitors pump prices against wholesale costs, was again instrumental in encouraging retailers to reduce prices rapidly when wholesale costs dropped. As recently as 13 June 2018, following pressure from the RAC, supermarkets announced a 2p per litre reduction.

Fuel duty: The RAC was one of those organisations that campaigned actively to maintain the freeze on fuel duty and the Chancellor responded positively last April by extending the freeze for a minimum of a further 12 months.

Cleaner air

Air quality strategy: We have campaigned vigorously for an evidence-based approach in which measures are targeted in areas with the poorest air quality at those vehicles contributing most to the problem. We have had some success though some local authorities appear intent on demonising all diesel vehicles.

We campaigned for the urgent introduction of a database that allows individuals and businesses to enter a vehicle's registration to look up its Euro emissions rating. The need for this has been acknowledged by the Government but we remain concerned about the speed of progress.

A better deal on parking

Fairer parking: The RAC's campaign for fairer private parking regulation influenced Sir Greg Knight MP to introduce a Private Parking (Code of Practice) Bill which now has the support of the Ministry for Housing, Communities and Local Government. The RAC submitted suggestions for protecting the interests of motorists to the working group set up to develop the new statutory code.

A review of bus lanes

Penalty Charge Notices (PCNs): RAC policy research on the issuing of bus lane PCNs in spring 2018 contributed to the Government acknowledging there are genuine concerns about the high volume of PCNs being issued and agreeing to review its guidance to local authorities. The RAC wrote to the Secretary of State for Transport specifically requesting the inclusion of signage within the scope of the review.

9 Who is the motorist?

Miles per year

0-5,000 miles	35%	+3%
5,001-10,000 miles	33%	-3%
>10,001 miles	22%	-1%

Average annual mileage

(all motorists)

09578

Miles +142

Number of cars per household

Households with one car	53%	-2%
Households with two cars	37%	+3%
Households with three cars	8%	no change
Households with four cars	2%	no change
Households with five or more cars	1%	no change
Average number of cars in household	1.62	+0.04
Average number of cars in ABC1 households	1.69	-0.01
Average number of cars in C2DE households	1.54	+0.1
Average number of cars in rural households	1.75	-0.01
Average number of cars in city households	1.6	+0.15

Age of vehicles*

Average age of vehicles in 2018 (years)	4.82	-0.08
Motorists who own a car less than a year old	16%	+3%
Motorists who own a car 1-2 years old	15%	-1%
Motorists who own a car 2-3 years old	13%	-2%
Motorists who own a car 3-4 years old	15%	+1%
Motorists who own a car between 5 and 10 years old	25%	-3%
Motorists who own a car more than 10 years old	16%	+1%

This does not reflect the total UK car parc – Department for Transport figures show the average age of a car on the road in 2017 was 8.1 years. Report on Motoring respondents were asked to indicate the age of the vehicle they drive most often, and as such does not account for any additional vehicles they may own or drive.

The 2018 survey results are in orange. The blue numbers underneath show the change since 2017.
*Age of vehicle driven most often.

10 Appendix

10.1 Research methodology

The RAC Report on Motoring 2018 is based on a large-scale online survey carried out by Quadrangle on behalf of the RAC. In total, Quadrangle interviewed 1,808 UK motorists (i.e. those who hold a full, current driving licence, drive at least once a month and have a motor vehicle in their household). The survey was conducted from 2-18 May 2018, with the questionnaire taking around 30 minutes to complete. The sample was nationally representative of age, gender, socio-economic groups, all UK regions, and car ownership (company car drivers vs. private car owners).

10.2 Statistical reliability

Any figures taken from a sample of a population should not be taken as a precise indication of the actual figures for that population. The reported figures are estimates, within a small margin of error, of the actual figures. The margin of error varies with sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering: the margin of error is smaller for a 90% or 10% result than for a 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 an example sample size of 1,000, and the actual sample size of the survey, 1,808.

Sample size	Reported percentage at 95% level of confidence				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000	±1.86%	±2.48%	±2.84%	±3.04%	±3.10%
1,808	±1.38%	±1.84%	±2.11%	±2.26%	±2.31%

How to read the above table: Assume the reported percentage, with a sample base of 1,808, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.84%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with a sample size of 1,808 will produce a percentage of 23%, plus or minus 1.84%, or within the range of 21.16% and 24.84%.

Please note that the margin of error will be marginally different for each reported percentage, however, the above table can serve to find the closest estimate.

11 30 years of the Report on Motoring

Much has changed on the UK's roads in the 30 years the Report on Motoring has been published. Here are some of the highlights.

1988
Research begins for the first edition of the Report on Motoring

1991
Becomes compulsory for adults to wear seatbelts in the rear of cars

1992
TVR launches the Chimaera, which went on to be the British company's biggest seller

1996
Opening of second Severn Crossing

1989
Ford launches five-door Fiesta and iconic Ford Escort XR3i; Mazda launches the MX5

1992
First Gatso speed camera is introduced on the westbound A316 over Twickenham Bridge in Surrey

1994
Channel Tunnel passenger service opens

1997
European New Car Assessment Programme (Euro NCAP) voluntary vehicle safety rating system is created

1997
Launch of the Land Rover Freelander

2000
Ariel launches the UK-built Atom

2001
Toyota launches the Prius in the UK, the first commercial hybrid vehicle

2003
Law is introduced banning use of handheld phones while driving

2000
New generation MINI Hatch is introduced

2001
Aston Martin launches the Vanquish, the first production Aston Martin that could hit 200mph

2003
London congestion charge is introduced

2003
M6 toll is opened to traffic

2005
Scotland's first average speed camera system is installed on a 32-mile stretch of the A77

2007
Portsmouth becomes first to introduce a city-wide 20mph speed limit on all residential streets

2011
Nissan Leaf becomes the UK's first mass-produced electric vehicle

2011
Toyota launches the Mirai, the world's first mass-produced hydrogen fuel cell vehicle – emitting just water and heat

2012
EU introduces new rules forcing insurers to charge men and women the same prices for the same car insurance products

2013
New penalties are introduced to tackle tailgating and middle lane hogging

2004
End of production of the Lotus Esprit which famously turned into a submarine in 'The Spy Who Loved Me'

2006
UK's first stretch of 'managed motorway' – the forerunner to today's smart motorways – opens on the M42 in the West Midlands

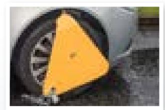
2007
Nissan launches the UK-built Qashqai, setting the trend for a whole new crossover segment

2010
Automatic emergency braking is introduced on high-end vehicles

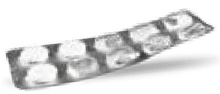
2011
Islington Council becomes the first London borough to introduce a blanket 20mph zone

2011
Fuel duty on petrol and diesel is reduced by 1p to 57.95p from its highest ever level of 58.95p

2012
Wheel clamping of vehicles on private land is banned in England and Wales



2014
Tesla Model S – the follow-up to Tesla Motor's Roadster electric sports car – launches in the UK



2015
Drug-driving law in England and Wales is updated to include eight general prescription drugs and eight illicit drugs

2015
Scotland reduces the legal alcohol limit from 80mg to 50mg in every 100ml of blood

2017
The Government confirms it will end the sale of all new conventional petrol and diesel cars and vans by 2040, as it unveiled new plans to tackle air pollution

2018

2014
Mitsubishi launches a Plug-in Hybrid Electric Vehicle version of the Outlander which goes on to become the most popular PHEV

2014
First 'smart' all-lane running motorway section opens on M25 J23-J25

2014
Vehicle tax disc is scrapped

2016
Production of the Land Rover Defender ends

2017
Penalty for using a handheld phone while driving is doubled to six points and a £200 fine after the 2016 Report on Motoring found illegal phone use at the wheel had reached epidemic proportions

2018
30th edition of the Report on Motoring is published

12 Always innovating to help our members

We are constantly investing in new technology and training for our patrols to ensure our members continue to receive a superior service at the roadside. Here are just four examples of how we go further to help drivers.

1. Fixing more faults: an advanced fault diagnostics capability

As cars have become more advanced, working out what is wrong with them becomes increasingly complex. This is why we give all our patrols tough book laptops that allow them to fix more of our members' vehicles at the roadside as quickly as possible.

The capability complements the 500-plus parts and tools each patrol van carries, and means that every RAC patrol can diagnose more faults and carry out repairs by programming new parts while a member is present. This reduces the need for a visit to the garage in the event of a breakdown.

2. Reducing future breakdowns: class-leading battery testing

Failing batteries are responsible for a large number of breakdowns – and a lot of lost time for our members. Sometimes a jump-start is the right thing, but what if the underlying health of a battery is failing?

This is where our class-leading battery tester comes in. It not only checks a battery's ability to start a vehicle, it also assesses the longer-term endurance of the battery and advises when a replacement is needed. This helps prevent members having to call us out again when their vehicle won't start for a second time.

3. No spare wheel? No problem: The UK's first multi-fit wheel

A majority of cars being sold today come without a spare wheel included as standard. This is often a surprise to motorists who look for it when their vehicle gets a puncture. The RAC was the first organisation to give all its patrols a multi-fit spare wheel specifically designed to tackle this problem and help prevent our members from being caught out.

4. The UK's first 'All-Wheels-Up' rapid recovery trailer

The RAC was the first UK breakdown service to equip all its vans with a built-in trailer, allowing its patrols to tow many vehicles in the event a roadside fix was impossible.

We've now evolved the system and have launched what we believe is a UK-first – a trailer that can lift all the wheels of a broken-down vehicle. It means RAC patrols can recover more vehicles than ever – including SUVs, 4x4s, and electric and hybrid vehicles, reducing the need for our members to have to wait for a recovery truck.

Rescue. Repair. Recover.

All from one orange patrol van

The unique 'All-Wheels-Up' rapid recovery trailer is being rolled-out across the UK

13 Company overview
Contacts

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

Driven by its ambition to provide first-class service for all its members, the RAC is committed to bringing peace of mind to drivers, whether that's by rescuing them when they break down or by giving them simple, trusted access to all the motoring services they need for their driving lives. Its additional services for drivers include a full range of insurance products and loans, an online shop, a new and used car buying website, and a nationwide network of approved repair garages and used car sales dealerships.

The RAC is constantly innovating in breakdown technology to keep ahead of its rivals as well as maintaining its record of fixing four out of five breakdowns at the roadside. As the first breakdown company to develop a trailer deployable from the rear of a patrol van to tow a stricken vehicle by either its front or rear wheels, the RAC has now taken this a stage further by launching an 'All-Wheels-Up' trailer capable of towing cars with all four wheels off the road, allowing its patrols to rescue many more cars without having to call out additional recovery vehicles.

In addition to its breakdown and motoring services work, the RAC campaigns at a national level in the interests of its members and UK motorists on a variety of issues including the condition and maintenance of roads, road safety, the needs of young drivers and the increasing cost of motoring.

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