



RAC Report on Motoring 2016

The road to the future

RAC Report on Motoring 2016



#ROM2016

RAC Report on Motoring

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Foreword

Julia Bradbury

I am delighted to introduce the RAC's 28th annual Report on Motoring. My enthusiasm for the great outdoors is well known and in my capacity as president of The Camping and Caravanning (C&C) Club, I meet many fellow enthusiasts.



We tend to take our cars for granted but the majority of us who love camping and caravanning depend upon them, and the freedom that they give us, to travel to remote places to enjoy the scenery and explore the area. The C&C Club has nearly 600,000 members from all walks of life and their views are likely to be a microcosm of those of the wider motoring public.

Fuel prices have been a top concern for all drivers for a number of years but with the fall in world oil prices, research for this year's report shows that this has dropped down the list of motorists' concerns compared with previous years.

But we cannot say the same about the state of the roads. Driving into a pothole can do huge damage to any vehicle's wheels, tyres and suspension and while the country's motorways and major roads are generally in a decent condition, rural roads in

many areas across the UK are in a pretty poor state. It's not surprising therefore that the state of local roads is the number-one concern for motorists in 2016.

With fuel more affordable, it is understandable that our roads have become busier over the last year and this has translated into increased concern about congestion and lengthier journey times for both local and longer trips. I am sure many of the C&C Club's members have experienced this and are starting their journeys at times when traffic is likely to be at its lightest.

The Report highlights that road safety issues are high on the list of motorists' concerns. But it's the irresponsible behaviour of a small minority of drivers that concern responsible motorists. It is those who insist on using their smartphones without a hands-free kit while driving, those who drive uninsured or untaxed vehicles, those who ignore traffic law and those who, despite all of the warnings, still drive when over the drink-drive limit, who increase the risk of accidents for all of us.

The development of our attitudes as road users starts when we are young. We follow our parents' example and we learn from other role models at school and in outside interest groups.

As an ambassador for UK Scouting I see many examples of how the movement helps to educate and inform young people through activities which are not only fun, but also lay the foundations that help them to develop into responsible members of society. The Cubs' road safety badge, which is a joint initiative by the RAC and the Scout Association and is ably supported by the RAC's Road Safety mascot Horace, is a great example of this.

As in previous years, the report is a fascinating window on motoring and the views of motorists. What's more, it offers insight that can help drive improvements for motorists in the months and years ahead.

Julia Bradbury

Executive summary

With more than 38 million motorists in Great Britain¹ it is of vital importance that the country's politicians, policymakers, transport authorities and motor industry take their views and concerns into account when planning for the future.

The 2016 RAC Report on Motoring covers a wide range of topics, from hardy perennials such as the price of fuel and the state of both local and major roads, to more contemporary issues like the dangers of smartphone use and motorists' views on the introduction of driverless vehicles.

The Report is based on research conducted with a representative sample of more than 1,700 motorists around the UK.

As ever, it reveals drivers' current attitudes and concerns while also painting a picture of how and why car owners' views are evolving over time.

The key findings in the 2016 Report are as follows:

The poor condition of local roads is becoming an even bigger concern.

When asked to identify their top concern, more motorists (14%) say the state and maintenance of local roads than any other matter. Local roads were also the most common top concern in 2015, but last year only 10% of respondents ranked this issue at number one.

The increase in dissatisfaction is not a surprise: while ministers have pledged extra funds both for filling potholes and preventative maintenance, the Government's own analysis suggests there is a multi-billion-pound backlog of repairs that is likely to take many years to be addressed².

There is strong support for Government funding to be ring-fenced for local road maintenance: 32% of motorists think this should be the UK's top transport investment priority, while 80% think it should be a top-five priority. Indeed, almost half (45%) of drivers say they would be willing to pay higher levels of vehicle tax if the revenues were used to improve roads.

Motorists are becoming more worried about other drivers using their phones.

Road safety is invariably a major concern in the Report on Motoring, but **this year's research has identified a further significant increase in the number of motorists who are worried about other drivers using handheld mobile phones** to make calls or check messages and notifications.

More than two-fifths of those questioned (41%) said this was one of their biggest concerns, a sharp rise on the 34% recorded in 2015.

Worryingly, a significant minority of motorists (31%) admit to having used a handheld phone to make or receive calls while driving at some point in the past 12 months. Meanwhile, **a fifth of drivers (20%) think it is safe to text or check social media while they are sitting in stationary traffic**, despite this being against the law.

Falling fuel prices have reduced the financial pressures on motorists.

Falls in petrol and diesel prices in 2015 and the early months of 2016 mean that most motorists now face lower vehicle running costs. Only 7% of drivers say fuel prices are their top concern this year, down from 10% 12 months ago.

However, the Report also found that there has been little change in overall expenditure on fuel, which suggests that many motorists are simply taking advantage of lower forecourt prices to use their cars more. **Concern about the cost of insurance has increased and is now number one for 7% of motorists.** Indeed, the cost of insurance is now a greater financial concern than the cost of fuel.



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

2. www.gov.uk/government/uploads/system/uploads/attachment_data/file/443898/Productivity_Plan_web.pdf

Executive summary

Drivers are being increasingly affected by congestion and slower journey times.

A rise in road-traffic volumes over 2015 – itself a result of lower fuel prices and improved economic conditions – has resulted in more motorists complaining of higher congestion levels. **Over a quarter (27%) of those questioned say congestion and longer journey times are a top-four concern in 2016**, well up on the 18% recorded last year. These concerns are greatest among those living in the South East of England.

Seven in 10 motorists (71%) say that the time taken to complete local journeys is becoming harder to predict, while a very similar proportion (70%) say the same about trips on major roads.

The availability of parking has also become a greater concern in 2016: 14% of motorists say this is one of their top four concerns this year, compared with 8% in 2015.

There is a growing trend for drivers to break the speed limits on country roads and in urban 20mph zones.

The 2016 Report shows a worrying trend with more motorists admitting to exceeding speed limits on country roads and in the growing number of urban 20mph zones.

While the number of drivers who admit to speeding in general has not increased significantly over the past 12 months, **the percentage of motorists who admit to speeding on country roads – which are where the majority of fatal accidents occur – has risen from 38% to 48% over the last five years.**

The proportion who say they have broken the speed limit on 20mph roads has risen from 38% in 2011 to 46%.

As in previous years, there is still a strong majority of drivers (66%) who believe the 70mph motorway speed limit should be raised to 80mph at least.

A significant percentage of motorists have serious concerns about the air quality where they live.

More than a third of motorists (34%) say they are worried about their local air quality, while 40% of drivers say they are more concerned about this issue now than 12 months ago. In terms of public policy, there appears to be strong support (from 66% of drivers) for action to cut vehicle pollution in the areas with the worst air quality, while **55% of motorists support the Clean Air Zones set to be introduced in a number of cities by the end of the decade.**

Despite this, issues such as the environmental impact of motoring and pollution from diesel engines rank low on the list of drivers' spontaneous concerns.

The UK's bid to become a pioneer in the introduction of driverless vehicles may flounder unless **more effective action is taken to communicate the benefits of this technology to the general public.**

Most motorists (76%) do not expect driverless cars to become available to the public before the end of the current decade, while only half (49%) expect autonomous vehicles to outnumber conventional models by 2070 – this is despite ministers' current plans to turn the UK into a leader in driverless-car technology.

The Government's success in this endeavour will be heavily influenced by its ability to convince motorists of the benefits of autonomous vehicles. **At present, only a quarter of drivers (27%) believe such cars will lead to safer roads, while a similarly low percentage (28%) expect driverless cars to reduce congestion. Almost half (48%) of respondents say they are not looking forward to travelling in a driverless vehicle.**



1.0

What's on motorists' minds?

Since the election of the Conservative Government in May 2015, the UK economy has continued to grow at a steady pace while unemployment has fallen and wages risen. However, it remains to be seen what medium and long-term impact the June 2016 decision to leave the European Union will have on the nation's prosperity. >



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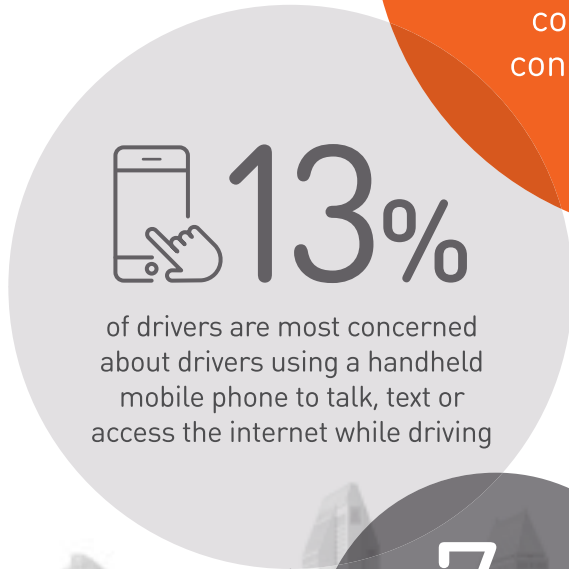
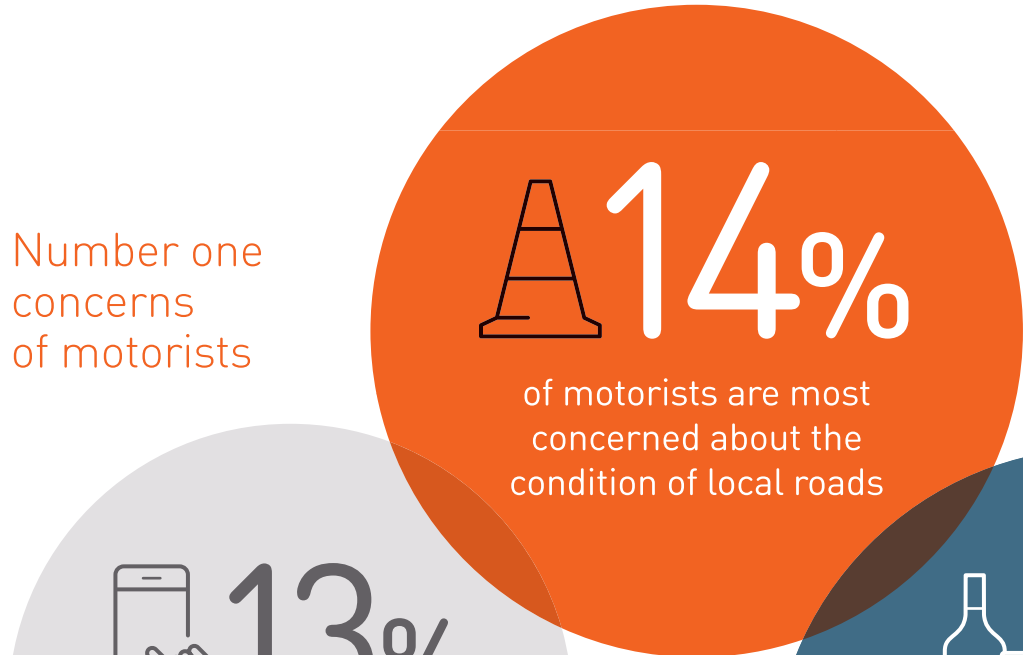
1.0 What's on motorists' minds?

With affluence increasing and lower forecourt prices, it comes as little surprise that the cost of fuel has again gone down the ranking of motorists' concerns since last year's Report on Motoring was published.

But in other areas, worries are on the rise. A far greater proportion of drivers are critical of the condition of the roads near where they live, while there has also been a sharp increase in the number of people who are concerned about the irresponsible and potentially highly dangerous behaviour of other motorists, in particular those who use handheld mobile phones while at the wheel.

Perceived increases in congestion and difficulties in parking have also become more significant concerns, as has the cost of motor insurance. At the same time, there has been a surprisingly sharp decline in concern about drink-driving.

And while environmental issues such as the diesel emissions scandal have been prominent in news reports in recent months, these barely register as a major concern among UK motorists.



1.0 What's on motorists' minds?

1.1 The cost of motoring

Ongoing global economic uncertainty coupled with oversupply from oil-producing nations has led to much lower oil prices and the cost of fuel in the UK fell accordingly, reaching low prices not seen for seven years.

At the start of 2016, the price of a barrel of crude dipped below \$30 – its lowest level for 12 years and less than half of what it was just six months earlier – and pump prices in Britain followed³.

RAC Fuel Watch data shows that the average price of a litre of unleaded in January 2016 was just over 102p while diesel was down to 101p – and

many forecourts were selling both for less than £1 a litre. By way of comparison, in June and July 2015, petrol averaged more than 115p a litre and diesel more than 120p⁴.

It is hardly surprising therefore that the price of fuel has become far less of a concern for UK road users this year: just 7% of those questioned say the price of filling up is their top motoring concern, down from 10% in 2015.

Less than a quarter – 24% – named expenditure on fuel as one of their four most pressing concerns in 2016, down slightly from the 26% 12 months ago.

By way of contrast, the equivalent figures for 2014 and 2013 – at a time when fuel was significantly more expensive – were 47% and 63% respectively.

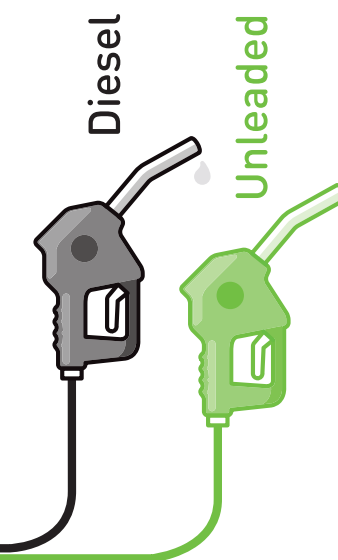
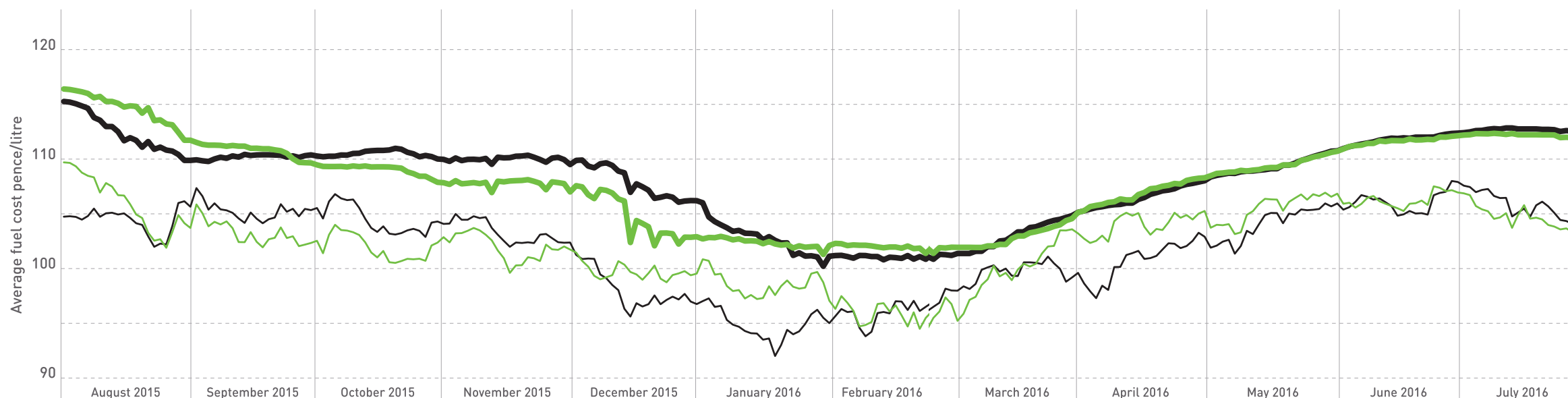
In addition to cheaper petrol and diesel prices, increased economic prosperity has no doubt played a part in reducing concerns about vehicle running costs. The UK's

GDP grew by 2.2% over the course of 2015, and by a further 0.4% in the first three months of this year⁵.

At the same time, wage growth has remained positive: in April 2016, the Office for National Statistics reported an average weekly earnings growth rate of 2%, well ahead of inflation.

The cost of fuel

-  Retail Diesel
-  Retail Unleaded
-  Wholesale Diesel
-  Wholesale Unleaded



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. RAC Fuel Watch
 4. www.rac.co.uk/press-centre#/blog_posts/average-uk-wholesale-and-pump-fuel-prices-since-january-2015-42326
 5. www.ons.gov.uk

Source: Experian Catalyst

1.0 What's on motorists' minds?

Following June's EU referendum, the outlook for both the UK economy and fuel prices has become less clear. A recovery in the oil price in the spring of 2016 means that forecourt costs have started to creep back up again. But with OPEC – the Organisation of the Petroleum Exporting Countries – seemingly committed to exerting downward pressure on oil prices in order to retain market share through a policy of excess supply, wholesale prices – in dollar terms at least – are expected to remain relatively low.

For British motorists, however, the weaker value of sterling following the EU referendum could feed through into higher pump prices in the coming months.

That said, the process of renegotiating trade deals with our European partners and of actually leaving the EU is likely to take many months and involves a high degree of uncertainty making it extremely difficult to speculate about future economic conditions.

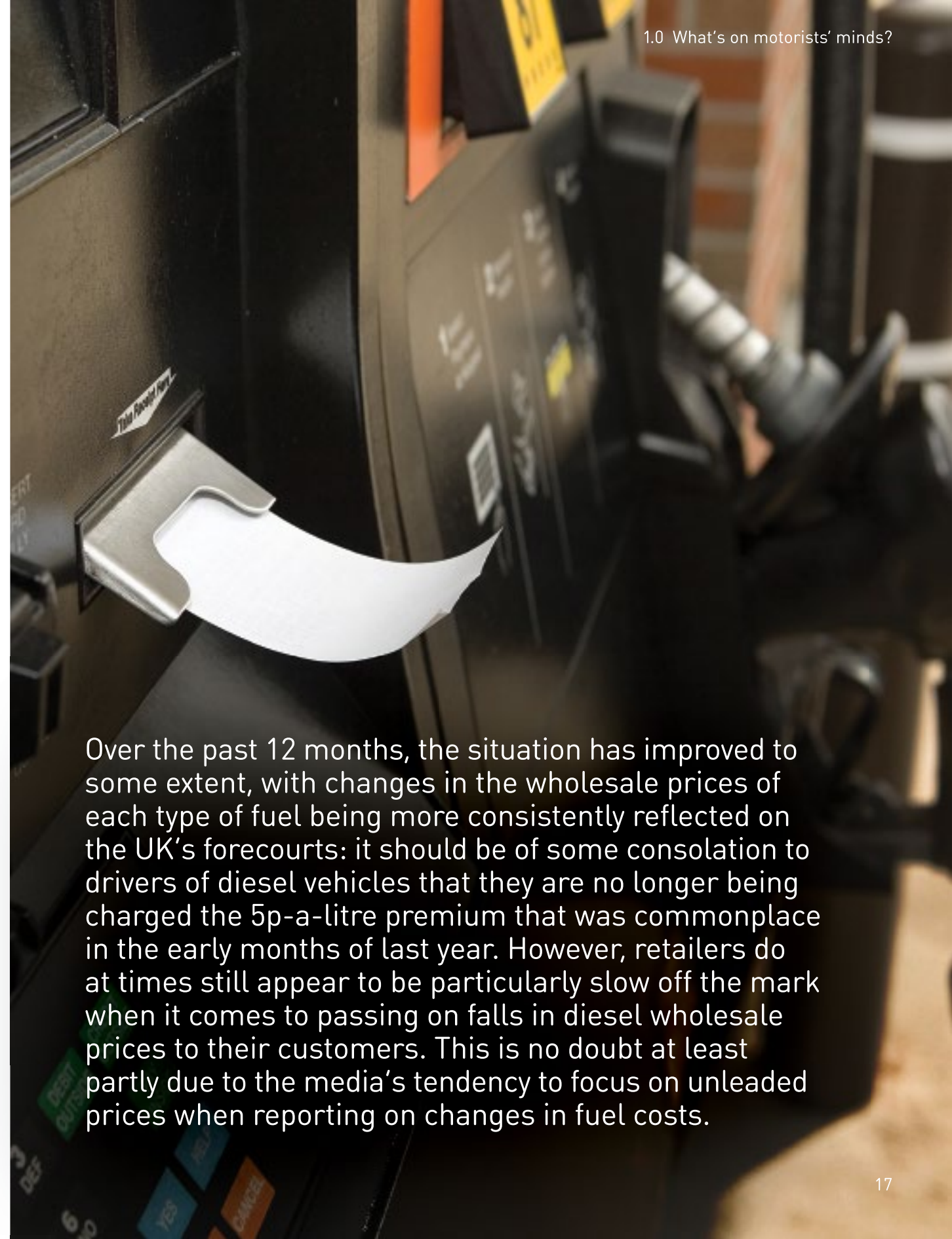
In the 2015 Report on Motoring, the RAC called for greater transparency over how retailers set prices for petrol and diesel. This was due in part to the fact that diesel vehicle owners had failed to see any benefit from the diesel wholesale price falling below that of petrol in the second quarter of 2015: during this period, average diesel pump prices remained stubbornly higher than petrol, in the RAC's view, for no good reason.



"Fuel has been plummeting for a year so it's no surprise that pump prices have fallen down the list of priorities for British motorists."

But with the Chancellor claiming three-quarters of every pound spent on the forecourts, it won't take much for that to change. I'd expect to see fuel prices rocket in motorists' list of concerns next year if the impact of Brexit really bites."

GRAEME PATON
Transport Correspondent
The Times



Over the past 12 months, the situation has improved to some extent, with changes in the wholesale prices of each type of fuel being more consistently reflected on the UK's forecourts: it should be of some consolation to drivers of diesel vehicles that they are no longer being charged the 5p-a-litre premium that was commonplace in the early months of last year. However, retailers do at times still appear to be particularly slow off the mark when it comes to passing on falls in diesel wholesale prices to their customers. This is no doubt at least partly due to the media's tendency to focus on unleaded prices when reporting on changes in fuel costs.

1.0 What's on motorists' minds?

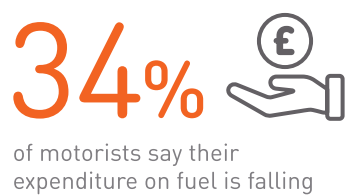
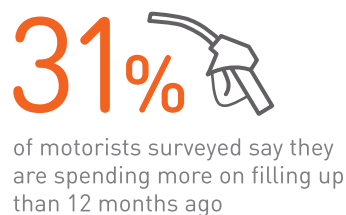
Transparency over the prices charged for fuel at motorway services has also been an important issue facing drivers in recent years. Progress in tackling this problem has been frustratingly slow, despite firm commitments from both the previous coalition Government and the current Conservative administration to take action.

More than three years ago, the Office of Fair Trading recommended installing signs on the motorway network to show fuel prices at upcoming service stations: this proposal was intended to allow drivers to shop around more easily, thereby increasing competition between retailers and driving down what were thought to be excessively high prices.

The coalition originally promised that a trial of such signs on the M5 near Bristol would begin in early 2015. But a succession of delays meant the pilot scheme was not introduced until March this year.

Moreover, initial results from this trial have been disappointing, with little if any reduction in fuel prices reported across the motorway service stations involved.

Lower petrol and diesel prices have had little significant impact on how much motorists feel they are spending on fuel: just 31% of those surveyed say they are spending more on filling up than 12 months ago compared with 32% who say their expenditure is falling. The respective figures in 2015 were 31% and 33%. However, lower pump prices may simply result in some motorists using their cars more, thus offsetting any benefit of the price reduction.



The Conservatives' decision to extend the fuel-duty freeze introduced by the coalition in 2011 has clearly helped, though UK fuel tax rates are higher than much of the rest of Europe.



1.0 What's on motorists' minds?

While most drivers say the cost of taxing their vehicles has not changed in the past year, 30% say it has risen – exactly the same proportion as in 2015.

A slightly smaller proportion than in 2015 (44% versus 41%) reported that their car maintenance bills had increased in the past 12 months. There was also a strong rise in the proportion of motorists who say their motor insurance premiums have risen: almost half (46%) say their car insurance costs have increased since last year compared with 34% who said the same in 2015.

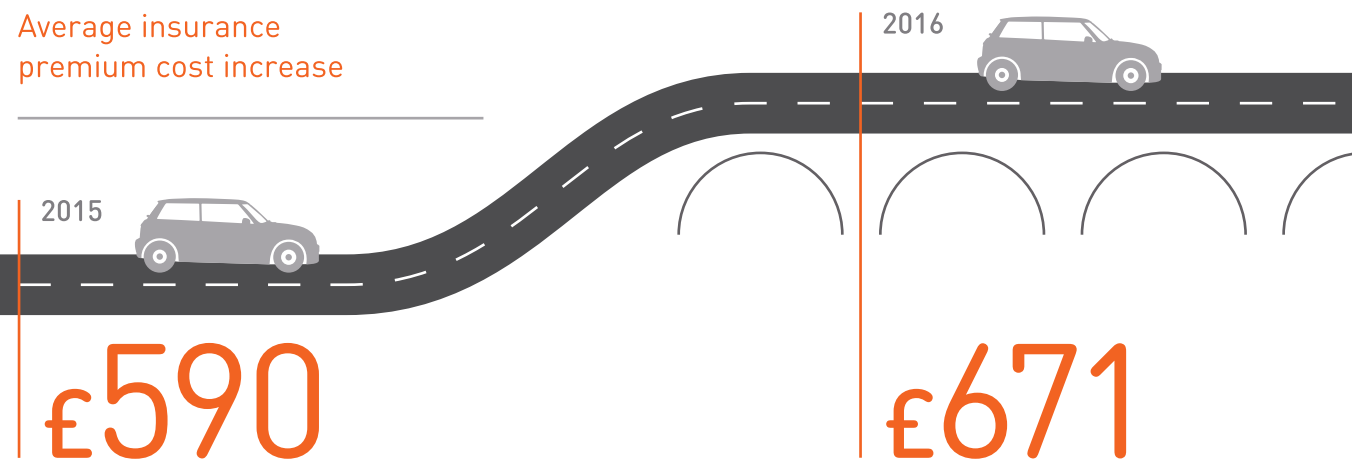
This is borne out by industry data, which shows the average premium rose by 14% in the 12 months to March 2016, from £590 to £671⁶.

One factor that has helped to push costs up is the decision by the Government to increase the rate of Insurance Premium Tax to 9.5% from 6% last autumn, and then to 10% in the March 2016 Budget.

Insurance price rises were reflected in motorists' general concerns: 8% say insurance bills are their top concern in 2016, compared with just 5% last year. In fact, the cost of cover ranks as the third most common top concern, behind the condition of local roads and drivers using handheld phones.

And more than a quarter of motorists (26%) say insurance prices are one of their four most serious concerns this year. Only 18% did so in 2015.

Average insurance premium cost increase



6. www.confused.com/car-insurance/price-index/overall



46% 

of motorists have felt a rise in insurance premiums over the last 12 months



“The cost of insurance is one of our members’ biggest concerns because prices are going up, and the whole market is rising – but people are saying, ‘I haven’t had an accident so therefore with my track record, why are my premiums going up?’”

SARAH SILLARS
Chief Executive
IAM RoadSmart

1.0 What's on motorists' minds?

1.2 Road safety

There is growing concern among motorists about the irresponsible and potentially highly dangerous behaviour of other road users. More than two in five (41%) of motorists say that drivers using handheld mobile phones – whether to make and receive calls, send text messages, or browse the internet – is one of their top four concerns, up from a third (34%) in 2015 – a higher percentage than for any other issue.

And 13% of drivers say that use of handheld phones by other motorists is their number-one concern in 2016 – only the condition and maintenance of local roads (14%) is cited as a bigger issue.

There has also been a rise in overall concern about other drivers breaking traffic laws: 23% say this is a top-four concern, up from 19% last year.

Overall concern about drink-driving is high but has fallen (22% now cite this as a top-four concern, down from 29% in 2015). Likewise, concern about driving under the influence of illegal drugs or banned prescription medication is down by a small amount (total concern is 17% compared with 19% last year).



“Concern among motorists over drink-driving has fallen this year, even though the number of deaths involving a driver over the limit has remained at the same level.

It may simply be that motorists are more aware of other issues, such as mobile phones. However, drink-driving remains a major killer – some 240 deaths a year – and must remain a priority for road safety.”

DAVID DAVIES
Executive Director
Parliamentary Advisory Council for Transport Safety

Road safety concerns



of motorists say that drivers using handheld mobile phones – whether to make and receive calls, send text messages, or browse the internet – is one of their top four concerns

of motorists cite drink driving as one of their top four concerns

of motorists are concerned about people driving under the influence of illegal drugs or banned prescription medication

There is growing concern among motorists about the irresponsible and potentially highly dangerous behaviour of other road users.



1.0 What's on motorists' minds?

While not as potentially hazardous as handheld phone use or drink and drug-driving, rudeness is also a more serious issue for motorists in 2016: over a fifth (21%) now say this is a concern, up from 15% 12 months ago.

There has been a further small increase in concern about the behaviour of cyclists on the road: 18% of motorists cite this as an issue, up from 16% in 2015.

The continuing year-on-year decline in the number of dedicated roads policing officers over recent years⁷ is likely only to have fuelled fears that irresponsible driving will go unpunished: 6% of motorists say this issue is a top-four concern.

Finally, concern about untaxed vehicles and/or uninsured drivers remains high: 27% name this as a top-four concern, up very slightly from last year's 26%. The RAC warned that Vehicle Excise Duty (VED) revenues could suffer as a result of increased evasion after the tax disc was scrapped in October 2014, and motorists were no longer required to display evidence they have paid their road tax.



Figures published in the DVLA's annual report and accounts in July showed VED revenue fell by £93m in the year following the abolition of the paper tax disc.

7. www.rac.co.uk/press-centre#/pressreleases/2015-sees-further-fall-in-numbers-of-dedicated-roads-policing-officers-1414666



18% 
of drivers cite concern about the behaviour of cyclists on the road as an issue

21% 
of motorists think rudeness is now a more serious concern

1.0 What's on motorists' minds?

1.3 The state of our roads

For one in every seven motorists (14%), the condition and maintenance of local roads is their most pressing concern, making it the most serious issue in this year's Report on Motoring. Problems with deteriorating road surfaces and potholes have been growing for many years now, but matters appear to be getting worse at an alarming rate, according to the drivers the RAC surveyed. In 2015, only 10% named local roads as their top concern.

Almost two-fifths of motorists (38%) listed local road conditions as a top-four concern this year, up from less than a third (30%) 12 months ago.

The Government has committed to invest £6bn into local road maintenance between 2015 and 2021⁸ while in the March 2016 Budget, the Conservatives agreed to set up a £50m-a-year Pothole Action Fund to deal with the most serious road-surface defects⁹.

But it appears these policies have so far failed to have any material impact on motorists' perceptions on the condition of local roads. This is not really surprising given that the Department for Transport's own analysis suggested that there was an £8.6bn backlog¹⁰ in local road maintenance and independent analysis suggests the backlog may be even greater¹¹.

Half of motorists (51%) say the state of the roads in their area has worsened over the past 12 months, with the preponderance of potholes by far the main culprit. This is against just 9% who say their local roads have in fact improved.

By way of contrast, only 2% of drivers say the state of our motorways is a top concern, while a total of 12% named this as one of their four most serious concerns.

Not surprisingly, a third of motorists (32%) still think that maintenance of local roads should be the Government's top priority when it comes to transport investment – a slight rise on last year's 30%.

Four-fifths (80%) think local road maintenance should be a top-five spending priority (78% in 2015).

51% 

of motorists say the state of the roads in their area has worsened over the past 12 months

80% 

of drivers think local road maintenance should be a top-five spending priority



8. www.gov.uk/government/news/6-billion-funding-to-tackle-potholes-and-improve-local-roads
 9. www.gov.uk/government/news/cash-for-councils-to-fill-almost-1-million-potholes
 10. www.gov.uk/government/uploads/system/uploads/attachment_data/file/443898/Productivity_Plan_web.pdf
 11. www.asphaltindustryalliance.com/images/library/files/ALARM%202016/ALARM_survey_2016_full_report.pdf



1.0 What's on motorists' minds?

1.4 Congestion and parking

Motorists have reported a sharp rise in concern about congestion and journey times this year. More than a quarter of drivers (27%) say these issues are among their top four concerns – this represents a very substantial rise on the 18% recorded in 2015. Meanwhile, 7% named high levels of traffic and resulting delays as their number-one concern compared with 5% last year.

These views reflected Department for Transport (DfT) estimates of traffic volumes in 2015, which showed a 1.6% increase on the previous year to a total of 317bn vehicle miles¹². The DfT also found

that typical traffic speeds were down, with average delays up by 5.5% on 2014.

It is highly likely that road traffic volumes are up as a result of a number of factors including the ongoing falls in the price of fuel, increases in wages making motoring more affordable, and general economic prosperity increasing commercial vehicle traffic.

Given the rising level of concern about congestion, it comes as little surprise to learn that motorists report they are also facing greater difficulties in parking. One in seven

(14%) say that the availability of parking is one of their four biggest concerns this year, a significant increase on the 8% recorded last year. The cost of parking is an even more serious issue: almost a fifth (18%) now say this is a top-four concern compared with one in eight (12%) in 2015.

It is worth noting also that the environmental impact of vehicle use ranked very low on most motorists' list of concerns, despite the relatively high level of media coverage of such issues over the last 12 months. Just 7% named environmental impact as a top-four concern, while the same proportion are worried about the accuracy of fuel efficiency and

emissions claims made by motor manufacturers. Even fewer (6%) are concerned about the impact of diesel emissions on health.

Nevertheless, as the findings highlighted later in this report will show, there are still high levels of awareness – if not outright concern – of these matters among Britain's motorists.



RAC call to action:

The state of our roads: see page 90

18% **P**

of motorists say the cost of parking is now one of their top four concerns

12. www.gov.uk/government/uploads/system/uploads/attachment_data/file/524267/road-traffic-estimates-gb-2015-summary-factsheet.pdf

2.0

Road safety

The dangers posed by the illegal and irresponsible behaviour of other drivers have become one of UK motorists' most pressing concerns, according to the 2016 Report on Motoring. In particular, the use of handheld mobile phones, whether for calls, text messages or internet access, is now viewed as a significant threat to road safety. >



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A rise in phone fears »



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Pushing the limits »



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Drink and drug-driving »

2.0 Road safety

In more general terms, there is now a higher level of concern about traffic law-breaking, such as speeding or jumping red lights. The RAC's research suggests this could be, at least in part, due to a decline in the numbers of roads policing officers in recent years, with more motorists taking the view that they are increasingly likely to 'get away with it'.

Concern about other people driving under the influence of alcohol has fallen to some degree, even though the proportion of motorists who admit to drink-driving appears to have increased over the past 12 months. And while there has been no significant rise in drivers' tendency to break 30mph and 70mph speed limits since the 2015 Report was published, there is a clear long-term trend towards increased levels of speeding both on 50mph/60mph country roads and in urban 20mph zones.

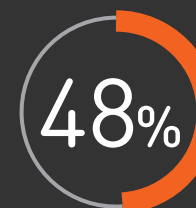
2.1 A rise in phone fears

Motorists are particularly concerned about other drivers using handheld mobile phones while in charge of their vehicles – and these levels of concern have risen dramatically since the 2015 Report on Motoring was published. Last year just over a third (34%) said that use of a handheld phone for talking, texting or internet access was one of their top four concerns. In 2016, the figure has risen to 41%.

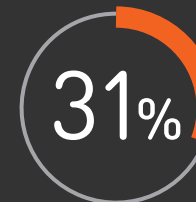
This year 13% of those questioned said phone use by others was their number-one concern, up from 10% in 2015, and second only to the condition and maintenance of local roads as this year's most common chief concern (cited by 14% of motorists).

It is difficult to say to what extent the distractions from handheld mobile phone use cause accidents, or whether this problem has become more acute, but it is likely that official statistics understate the problem.

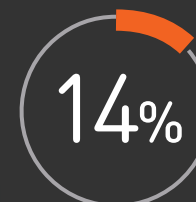
Motorists' attitudes to handheld mobile phone use while driving



admitted to using their phone at the wheel to make or receive calls while in stationary traffic



admitted to using their phone to make or receive calls while driving



said they have used their smartphones to take photos or video while driving



think it is acceptable to check social media while sitting in traffic



2.0 Road safety

Despite this high level of concern, a significant minority of motorists do admit to using handheld phones to make or receive calls while driving. Almost a third (31%) have done so at least once in the past 12 months: 15% say they rarely do so, 10% say they use their phones in this way only sometimes, while 6% admit using handheld phones at the wheel most or all of the time.

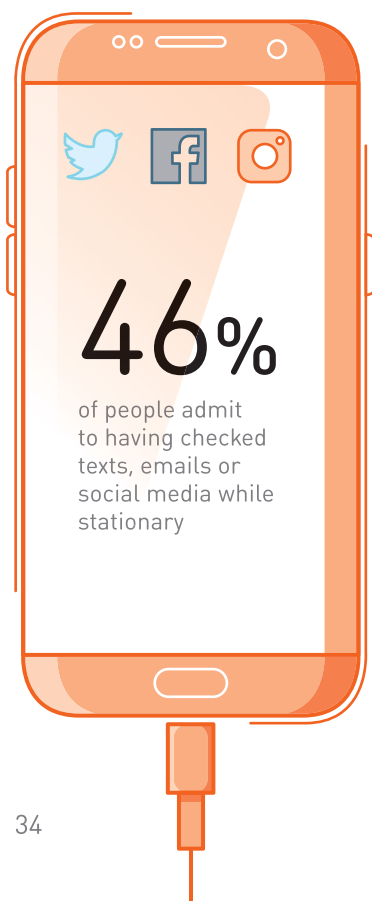
Motorists are much more likely to use their handheld phones while sitting in stationary traffic with their engines on, despite the fact that this is also against the law.

Almost half of drivers (49%) have done so in the past year, while 46% admit to having checked texts, emails or social media while stationary.

The idea that it is acceptable to use a phone while stuck in traffic or queuing at a set of lights, for example, seems to be gaining currency. A fifth of motorists (20%) say they agree with the statement 'It is safe to text or check social media on your phone when stationary', up from 17% in 2015.

And equally worryingly, taking phone calls on a handheld phone while driving is unacceptable to fewer motorists this year; only 78% thought taking a quick call was unacceptable, down from 83% 12 months ago.

As for the reasons given for using a handheld phone while driving, 23% say 'It was an emergency', while 21% did so to obtain information needed for their journeys; 20% made a call because 'It could have been an emergency'.



of motorists think taking quick phone calls on a handheld phone while driving is unacceptable



"We surveyed 7,000 drivers and 95% of them rated their own driving as 'good' or 'very good' and it was everybody else on the road that they were worried about. This ties into the concern about road safety where people think, 'it's not me; it's everybody else'."

SARAH SILLARS
Chief Executive
IAM RoadSmart

2.0 Road safety

Figures for other types of phone use while in control of a moving vehicle are particularly alarming: 26% admit they have checked messages while driving in the last 12 months, while 19% have written and sent texts, emails or social media updates, despite the huge distractions involved. Finally, one in seven motorists (14%) say they have actually used their phones to take pictures or record videos while at the wheel.

The 2016 Report on Motoring has also looked at the wider distractions reported by drivers. The most common is tiredness, cited by 40% of motorists as one of their top five distractions, followed by passengers talking (39%) and 'something interesting happening outside the car' (37%). Such distractions, however, rarely appear in casualty

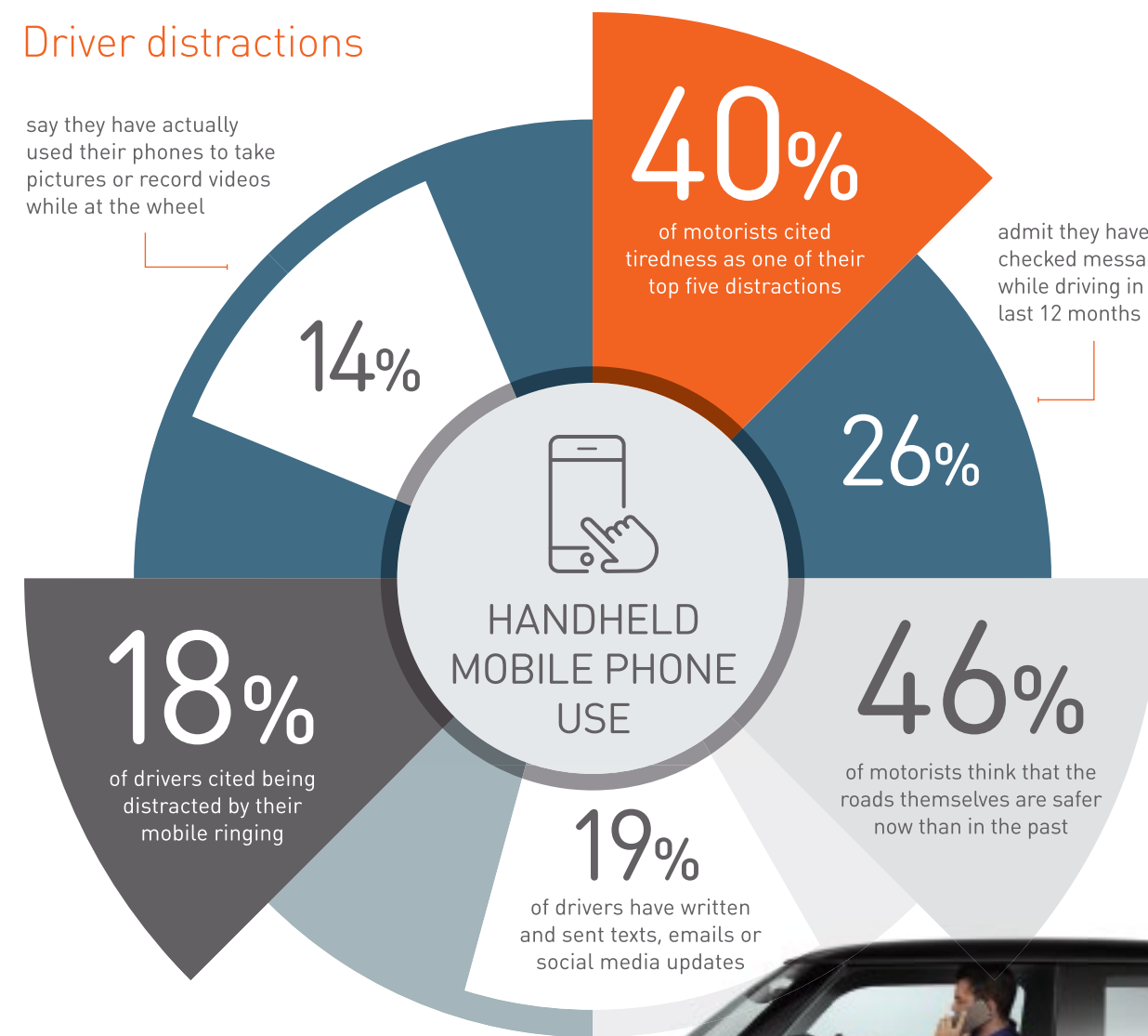
statistics and accidents attributable to such distractions are all too often simply attributed to 'driver error'.

A fifth (18%) of drivers cited being distracted by their mobile ringing, while 11% say using their mobile is a distraction. Only one in six motorists (16%) claim that they don't get distracted while driving.

While concerns over the behaviour of other drivers have grown, more people think that the roads themselves are safer now than in the past (46% against 42% in 2015), and almost two-thirds (63%) believe that driver-assistance technologies, which are increasingly common in the latest generations of vehicles, are making driving safer. And not surprisingly, 84% of motorists agree that cars are safer than they used to be (86% in 2015).

Driver distractions

say they have actually used their phones to take pictures or record videos while at the wheel



“It is interesting to see that tiredness is cited as the number-one distraction for drivers. One of the key reasons that people pull off into service areas is just to have a bit of a break.

But there are issues concerning the limits put on how long motorists can stay in service areas. If you put the seat back and get your head down for a couple of hours, then that is the responsible thing to do, and you don't expect someone to come along and slap a charge on you as a result.”

THEO DE PENCIER
Non-executive Board Member
Transport Focus



2.0 Road safety

2.2 Pushing the limits

There has been no significant change in the number of motorists who admit to speeding in 2016 overall. But this year's research points to a longer term trend for drivers to increasingly exceed limits both on country roads – where limits may be 50mph or 60mph – and in the growing number of urban 20mph zones.

Among all drivers, there has been an increase in concern regarding motorists who break traffic laws: this is a top-four concern for 23% of those questioned, up from 19% in 2015.

There has been no change in the proportion of motorists who say they frequently or occasionally break the speed limits on motorways (70%) or on 30mph urban roads (44%). But over the past five years, the number who admit they speed on country roads has grown from 38% to 48% (up from 46% in 2015), while the figure for 20mph roads has risen from 38% in 2011 to 46% this year (44% in 2015).

A greater propensity to speed on country roads is particularly worrying given that they are where the majority of fatal accidents occur¹³.

According to Department for Transport statistics published in June 2016, 51% of fatal casualties occurred on 'non-built-up roads' in 2015, compared with 43% on roads in built-up areas and 6% on motorways.

Overall, however, the DfT figures showed a welcome fall in the overall number of casualties last year, which is particularly good news given the increase recorded in 2014.

The fact that more drivers say they exceed the limit on 20mph roads can be explained in part at least by the fact that the number of 20mph zones is thought to have increased significantly over recent years. In some areas, local authorities are applying 20mph limits to busy through-routes where users believe they can safely travel at higher speeds.

13. www.gov.uk/government/statistics/reported-road-casualties-in-great-britain-main-results-2015



51% 

of fatalities occurred on 'non-built-up roads' in 2015

48% 

of motorists admit they speed on country roads

2.0 Road safety

There is no official record of the number or extent of 20mph zones which have been introduced by local authorities in the UK, although the DfT says it is now 'considering the best way' to measure the growth of such zones¹⁴.

There is less acceptance of 20mph limits among motorists than there is of 30mph limits. Two-fifths (41%) of drivers think the limit in 20mph areas should be higher (33% in 2015), compared with only 22% who take the same view of 30mph areas (16% in 2015).

At the same time, a majority of motorists (66%) still believe the 70mph motorway limit should be raised to at least 80mph, a finding that has emerged from research for the Report every year since 2010.

This year's Report shows little change in motorists' views of the acceptability of speeding:

39% say it is acceptable to travel at 80mph on the motorway, while 23% say it is OK to do 25mph in a 20mph zone, and 14% say it is acceptable to drive at 40mph on a 30mph road.

The fall in the number of roads policing officers may have had some impact on motorists' willingness to break the speed limit. Government figures show that the total number of dedicated roads police in England and Wales fell by 27% between 2010 and 2015¹⁵ from 5,338 to 3,901. The 2016 Report on Motoring found that 27% of drivers agree with the statement 'I don't think I am very likely to get caught if I break most motoring laws', up from 24% in 2015. A clear majority (61% compared with 62% in 2015) believe there are not enough police on the roads enforcing driving laws.



Number of dedicated roads policing officers in England and Wales



14. www.gov.uk/government/statistics/reported-road-casualties-in-great-britain-main-results-2015
15. www.parliament.uk/business/publications/written-questions-answers-statements/written-question/Commons/2015-01-28/222445/



"In my view, the reason why an increasing number of motorists say they exceed the 20mph limit is that initially they understood why these zones were put in place. But now we have a proliferation of them and many drivers don't understand why and so are less inclined to comply. For example, in some areas, 20mph limits are being imposed on major through-routes."

DAVID BIZLEY
Chief Engineer
RAC

2.0 Road safety

2.3 Drink and drug-driving

Drink-driving remains a significant issue of concern for motorists in the UK, but this year has seen a surprising fall in the number that cite it as one of their top four biggest concerns, from 29% in 2015 to 22%. Similarly, 12 months ago 9% of motorists said drink-driving was their top concern but this has dropped to 5%. It is possible that this fall is attributable to a lower level of press coverage of accidents arising from drink-driving and a targeted approach by the THINK! campaign that restricts advertising to those times of the year, primarily in December, when the risk is perceived to be greatest.

Nevertheless, the Report does show a small rise in the number of people who admit to having driven while over the limit over the past year: 6% say they have done so shortly after drinking, up from 4% in 2015, while 2% say they have got behind the wheel the morning after drinking despite thinking they were still over the limit (1% in 2015).

As previous statistics have shown, it is people under the age of 45 who are most likely to admit to drink-driving.

The rate in Scotland is lower than the UK average, and this may be due to the fact that there has been a lower blood-alcohol limit than the rest of the UK in force north of the border since December 2014.

The debate about whether England and Wales should reduce the limit to 50mg/100ml from the current 80mg/100ml level is ongoing. Earlier this year, the Department for Transport said that there were no plans to review the law as it stands¹⁶.

Instead ministers said they viewed 'rigorous enforcement and serious penalties' as a more effective deterrent.

In Northern Ireland, however, a 50mg/100ml limit is to be introduced in 2018, with even tougher restrictions on professional and learner drivers.

2% 

of motorists say they have got behind the wheel the morning after drinking believing they were over the limit

The debate about whether England and Wales should reduce the limit to 50mg/100ml from the current 80mg/100ml level is ongoing.

22% 

of motorists cite drink-driving as one of their top four concerns

6% 

of people admit to having driven while over the limit shortly after drinking over the past year

16. www.bbc.co.uk/news/uk-35530352

2.0 Road safety

The 2016 Report on Motoring once again shows strong support among motorists for a lower drink-drive limit across the whole of the UK with 57% in favour. More specifically, 36% think it should be 50mg/100ml and 21% think it should be 20mg/100ml.

Opinion is split over whether a lower UK-wide limit of 50mg/100ml would be effective in deterring drink-drivers. Two-fifths (40%) think it would help, against 37% who don't. Interestingly, 60% of Scottish motorists think a reduction would be effective, which is perhaps a reflection of their positive experience since the law was changed two years ago.

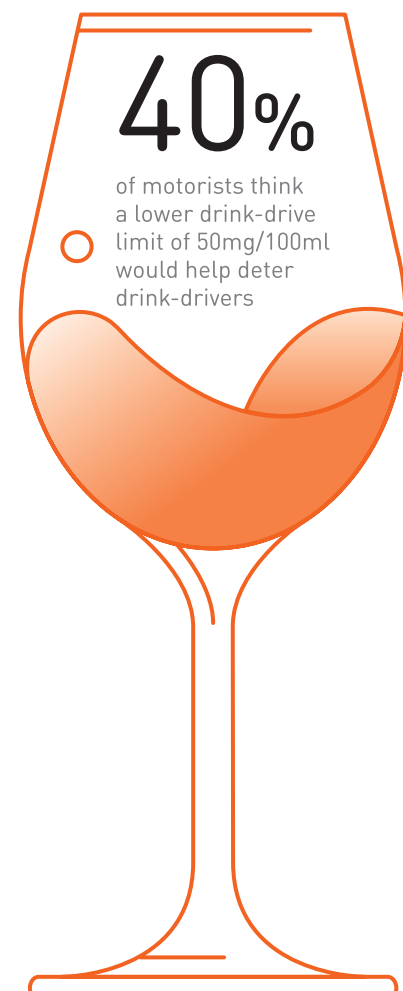
Among those who think a lower limit will not have an impact, two-thirds (66%) say this is because they do not expect a change in the law to deter habitual drink-drivers.

There was little change in the percentage of motorists who admit to driving under the influence either of illegal drugs or banned

prescription medication: 7% say they have done so in the past 12 months compared with 6% in 2015.

There is some evidence to suggest that of those who have driven after taking class A, B or C drugs, more than two-thirds are under 35.

But of those who have driven with banned prescription drugs in their system* the age profile is a little different, with 43% in the 35 or over category, 40% aged between 25 and 34, and 17% under 25.



of those who have driven with banned prescription drugs in their system* are aged 35 or over

*Small research sample



“It would be a poor argument to call for a reduction in the drink-drive limit just because others have done it, but there is now plenty of data to show that a change could save lives – our own research estimated that a cut could save around 25 lives a year.”

STEVE GOODING
Director
RAC Foundation

3.0

The state of our roads

The poor condition and lack of adequate maintenance of local roads remains the issue of biggest concern among drivers, this year's Report on Motoring has found. But concerns appear to be worsening, with 14% citing local roads as their top concern, up from 10% in 2015. >



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3.0 The state of our roads

Motorists are more sanguine about the state of major roads and motorways, but with an increase in traffic volumes recorded over the past 12 months, it is no surprise that congestion and the availability of parking have become more significant concerns.

And while there is general agreement that the authorities are doing their best to minimise the delays caused by accidents, more could be done to keep motorists informed about the impact of major incidents.

3.1 Ongoing problems with local roads

The condition and maintenance of local roads is the top concern among the largest percentage of motorists once again in 2016. Of those questioned, 14% say this is their number-one concern, up from 10% last year.

Almost four in 10 drivers (38%) say the state of local roads is one of their top four concerns this year: this also represents a sharp increase on last year (30%).

Just over half of drivers (51% compared with 50% in 2015) say the condition of the roads in their area has deteriorated over the past 12 months, overwhelmingly as a result of potholes (cited by 97% of respondents). However, roadside litter (25%) and poor grass and/or foliage maintenance (20%) are also named by many as problems.

Only 9% of motorists think that local roads have improved since 2015 – this represents a very small drop from last year’s 10% who thought the condition of local roads had improved over the previous 12 months. In terms of demographics, older drivers and those in rural locations are more likely to think that the condition of roads has deteriorated.

By way of contrast, a majority of motorists (61%) think that the condition of the motorways and dual carriageways they use has not changed over the past 12 months (up from 58% in 2015). And only 7% think they have improved against 9% who took this view last year, perhaps indicating it is still too early for motorists to see the benefits of the Road Investment Strategy in terms of the condition of the existing network.

Condition of motorways and local roads



say the condition of the local roads has deteriorated over the past 12 months

61%

think the condition of motorways and dual carriageways has stayed the same since 2015

9%

of motorists think that local roads have actually improved since 2015

97%

of those who said that the condition of local roads is worse, said it's due to potholes and poor road surface



say the condition and maintenance of local roads is their top concern



3.0 The state of our roads

Of the 28% who think the state of major roads has declined, 83% cite surface quality, including potholes, as one of the problems they face, although litter (28%), lane-marking visibility (24%) and carriageway lighting (15%) are also issues.

Concern about the state of local roads has grown despite some attempt by the Government to increase expenditure on local road infrastructure. Ministers have promised to pump £6bn into local road maintenance between 2015 and 2021¹⁷ while in the March 2016 Budget, the Government announced the creation of a £50m-a-year Pothole Action Fund to target the roads in greatest need of repair¹⁸.

This follows analysis from the Department for Transport which found that there was a backlog of up to £8.6bn in spending on local road maintenance¹⁹.

However, the latest independent findings from the Asphalt Industry Alliance (AIA) suggest the true picture may be even more gloomy. The organisation's Annual Local Authority Road Maintenance (ALARM) report published in March 2016²⁰ found that, despite the commitment to extra state funding, local authority highways departments in England claimed that funding has dropped by 16% on average since last year. The report also said that the amount of investment needed to bring roads in England and Wales up to an acceptable level had remained just below £12 billion.



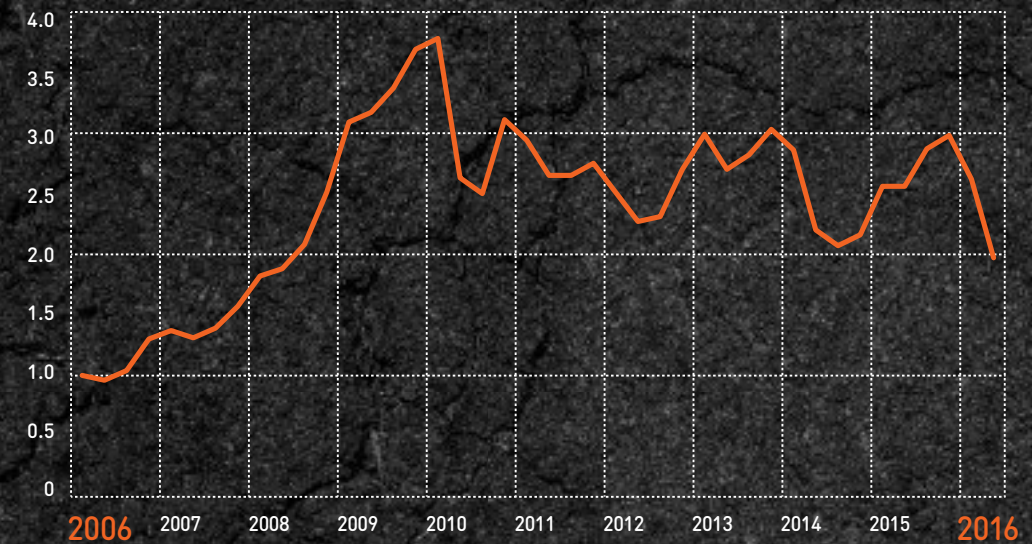
"The lower support for the Government to prioritise investment in the maintenance of motorways and other major roads may simply reflect the fact that it's the condition of local roads that worries respondents, because they have deteriorated at such a rapid pace."

STEVE GOODING
Director
RAC Foundation

17. www.gov.uk/government/news/6-billion-funding-to-tackle-potholes-and-improve-local-roads
18. www.gov.uk/government/news/cash-for-councils-to-fill-almost-1-million-potholes
19. www.gov.uk/government/uploads/system/uploads/attachment_data/file/443898/Productivity_Plan_web.pdf
20. www.asphaltindustryalliance.com/images/library/files/ALARM%202016/ALARM_survey_2016_full_report.pdf

RAC Pothole Index

The RAC has used its database of over 2 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 uses the share of all breakdowns where damage from potholes, such as damaged shock absorbers, broken suspension springs and distorted wheels, is likely to have been a major contributor.



The share is averaged over the previous 12 months to remove seasonal effects and a correction is applied to take account of the overall improvement in vehicle reliability over time.

The index uses the share 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 the start of 2006. Thus an index of 1.2 would mean the likelihood of pothole damage had increased by 20%.

The index shows that 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. There have been several extreme weather events over the last six years and the Government has provided additional funding to address the pothole damage that resulted.

However, the index shows that while this funding has addressed the immediate effects of the bad weather, it has been insufficient to tackle the underlying deterioration that occurred prior to 2010. Going forward, the RAC will publish the index quarterly.

Motorists wanting to report a pothole should visit the RAC website or download the free RAC Report Pothole mobile app for their iPhone or Android smartphone.



3.0 The state of our roads

The RAC continues to emphasise the need for politicians and highways authorities to avoid focussing solely on ‘filling potholes’, as many policy announcements seem to do. Instead a long-term approach should be adopted that prioritises preventative maintenance that avoids potholes developing in the first place. Almost all journeys start and finish on local roads, even if the bulk of the journey is by rail, sea or air. As such, the poor state of local roads impacts on businesses, individuals and the national economy. The RAC therefore believes that all local roads should be brought into the scope of the National Infrastructure Commission, the body which was set up in 2015 with Lord Adonis as its first chairman.

There is also strong support for targeted improvements to local roads, such as changes in road design to reduce bottlenecks:

15% of motorists say this should be the top priority for investment, while 70% (66% in 2015) think it should be a top-five priority.

There is still a significant percentage of drivers (45% – no change on 2015) who would be willing to pay higher levels of tax provided the extra revenues were ring-fenced to improve roads. Meanwhile 40% of motorists believe current road taxation levels are a ‘fair price to pay for the personal freedom that driving gives them’ – a sharp rise on the 2015 figure of 33%.

£6bn 

dedicated central government funding for local road maintenance between 2015 and 2021




“It is interesting when you look below the surface of road condition issues, litter appears to be coming up as a concern as well as the likes of grass and foliage maintenance.”

All of this seems to work back to the idea that the general environment of roads is getting shoddier. This is consistent with some of the work carried out by Transport Focus.”

THEO DE PENCIER
Non-executive Board Member
Transport Focus

16% 
average drop in road maintenance funding claimed by local authority highways departments in England

70% 
of motorists support targeted improvements to local roads saying this should be a top-five priority

Against this background, it comes as no surprise that the 2016 Report on Motoring found that a third of drivers (32%) think that the maintenance of local roads should be top priority for local and national government transport investment (up from 30% in 2015). Four in every five motorists (80%) think this should be a top-five priority.

3.0 The state of our roads

3.2 Congestion and parking difficulties

Congested roads and slower journey times have become a much greater concern for drivers, the 2016 Report on Motoring has found. More than a quarter of motorists (27%) say that congestion is one of their top four concerns this year, a huge increase on the 18% recorded in 2015. Congestion is a number-one concern for 7% of drivers, against 5% 12 months ago.

The research found that this concern is highest in the South East of England: here, 36% say congestion is a top-four concern, with 9% ranking it at number one.

This issue has fed through into journey times, with 71% saying that the time taken to complete local trips is becoming less predictable (up from 67% in 2015), and 70% saying the same of journeys on major roads (also 67% in 2015).

The biggest contributory factor to greater concern over congestion appears to be higher traffic volumes. According to Department for Transport estimates for 2015, there was an overall 1.6% increase on 2014 to 317bn vehicle miles²¹.

At the same time, average traffic speeds were down, resulting in a typical rise in delays of 5.5% on the previous year. The DfT cited the fact that GDP rose in 2015 while fuel prices fell as the main reasons for growth in traffic levels.

Just under three-quarters of motorists (73%) believe that local and national government should take 'much tougher' steps to reduce congestion (72% in 2015). It is not clear exactly what these steps should be, although it is worth noting that there has been a slight increase (from 31% to 33%) in the percentage of drivers who would be willing to pay per mile for road use provided this was offset by a reduction in other motoring taxes.

Overall vehicle miles in England and Wales

2015

317,000,000,000 miles

21. www.gov.uk/government/uploads/system/uploads/attachment_data/file/524267/road-traffic-estimates-gb-2015-summary-factsheet.pdf



“Looking at what motorists want to see in terms of transport investment, I would say that the things drivers are pushing for are those that the Government isn’t actually prioritising.

The expenditure is going on motorways and trunk roads, it’s not going on local roads. I think the Government finds it difficult to treat everyday transport, such as local roads or buses, as a priority – they tend to like big projects.”

STEPHEN JOSEPH
Chief Executive
The Campaign for Better Transport

3.0 The state of our roads

Given the rising concern about congestion, it is not surprising that problems associated with parking are also on the up. There has been a sharp increase in concern about the availability of parking this year: 14% of motorists say this is a top-four concern as opposed to just 8% in 2015. Parking charges are also a bigger issue, with 18% saying this is a top-four concern compared with 12% a year ago.

Motorists' claimed level of vehicle use has changed relatively little in the last 12 months, with a quarter (25%) saying they use their cars a little or a lot less this year. Only 22% say they use their vehicles more.

The most common reason for declining vehicle use was given as increased difficulty in parking: a quarter (24%) of those who use

their cars less cited this factor compared to only 14% who cited the same reason 12 months ago. Other reasons cited this year include a loss of income (21%) and the fact that they now work from home (16%).

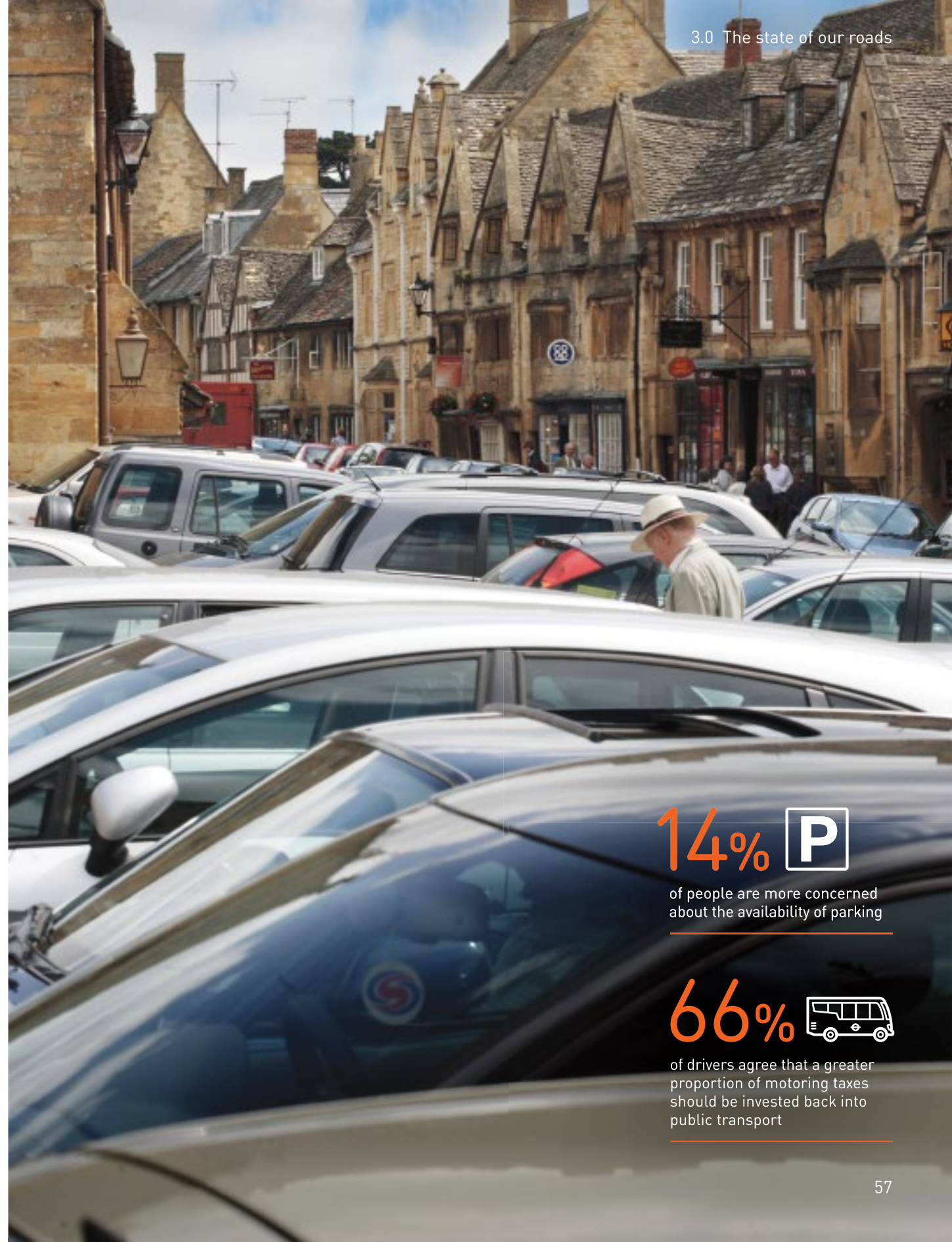
Views on public transport have changed little over the past 12 months: in 2016, 54% say they would drive less if public transport were better (56% last year), with the biggest obstacles identified as high fares, lack of proximity, and the fact that services do not run frequently enough.

Meanwhile, two-thirds of drivers (66%) agree that a greater proportion of motoring taxes should be invested back into public transport – this represents a small increase on 2015 (64%).



“There has been a rise in the proportion of motorists who say they want to see more of their taxes invested back into public transport. But their view might actually be, ‘We want the state of public transport to be improved so everyone else can use it and we can have the roads to ourselves’.”

DAVID LEIBLING
Transport and Motoring Consultant



14% 

of people are more concerned about the availability of parking

66% 

of drivers agree that a greater proportion of motoring taxes should be invested back into public transport

3.0 The state of our roads

3.3 Incident response and variable message signs

Aside from the headline opinions on congestion levels, the 2016 Report on Motoring also looked at drivers' views on the way in which highways authorities around the UK deal with major incidents on motorways and major roads.

Two-thirds (66%) of motorists agree that Highways England, the Welsh Government, Transport NI and Transport Scotland, in partnership with the emergency services, do their best to minimise delays when major incidents occur. Only 11% of drivers do not think this is the case. And drivers largely accept that incidents and delays are a fact of life: 86% share the opinion that major incidents will occur from time to time and that major hold-ups are therefore inevitable.

Just under half of those questioned (48%) agreed that the authorities did their best to keep them informed of the reasons for major incidents and the likely delays as a result, with only 16% disagreeing with this view.

In terms of the variable message signs now in widespread use on motorways around the UK, almost two-thirds of drivers (63%) say they trust the accuracy of the information regarding road incidents (19% do not).

Six in 10 (59%) trust the accuracy of the travel time estimates on such signs (against 18% who do not), and 69% find these estimates useful (versus 9% who do not).

Four in 10 (43%) believe the accuracy of these signs has improved over the past 12 months, while a very similar proportion thinks their accuracy has stayed the same (42%).

Perception of variable message signs



of motorists agree that Highways England, the Welsh Government, Transport NI and Transport Scotland, in partnership with the emergency services, do their best to minimise delays during major incidents

10% of drivers disagree and feel they don't do their best to minimise delays

48% agree authorities do their best to keep them informed of the reasons for delays

63% of motorists say they trust the accuracy of the information displayed on variable message signs



3.0 The state of our roads

The introduction of the 'all lane running' smart motorway has increased the importance of motorists' compliance with red X signs and variable speed limits in order to protect the safety of road users involved in incidents on live running lanes. The vast majority of motorists (90%) say they always comply with the red X signs indicating a lane closure on motorways, while slightly fewer (83%) say they always comply with speed restrictions that are, from time to time, imposed due to accidents, bad weather or volume of traffic.

More than four in 10 drivers (41%) claim to have been delayed by 45 minutes or more as the result of a major incident in the past 12 months. But while the figures given above suggest that motorists

have high levels of confidence in information displayed on roadside variable message signs, radio traffic news remains the most common way for drivers to get information about delays.

Almost four in 10 (38%) of those who have suffered a long delay in the past five years say they found out the reasons for the hold-up by listening to radio traffic reports (compared with 18% who found out from variable message signs), while a third (32%) say they discovered how long a delay was likely to last via the radio (24% from signs).

A clear majority (72%) say they would expect to receive details of incidents and delays via the radio, compared with 47% from signs and 36% from live traffic information on their satnav.



"I am surprised by the high level of dependence on the radio to find out about traffic problems. Today's motorists have the likes of variable message signs and live traffic information on their satnavs, but it appears radio is still king."

DAVID BIZLEY
Chief Engineer
RAC

41% 

of drivers claim to have been delayed by 45 minutes or more as the result of a major incident in the past 12 months

72% 

of motorists say they would expect to receive details of incidents and delays via the radio

4.0

Air quality and the environment

While matters related to the environmental impact of motor vehicle use do not feature prominently in the list of drivers' main worries in the 2016 Report on Motoring, when questioned directly about topics such as local air quality and pollution from diesel emissions, many motorists express a high level of awareness and, in certain cases, concern. >



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Air quality concerns >>



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Choice of next vehicle >>



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The emissions scandal and trust in manufacturers >>

4.0 Air quality and the environment

A significant minority of drivers are unhappy with the air quality where they live, and there is general support for measures such as higher taxes and vehicle restrictions that are aimed at reducing pollution from diesel engines.

Meanwhile, levels of trust in motor manufacturers have fallen over the past 12 months, no doubt at least partly in response to the diesel-emissions scandal that emerged last year as well as increased scepticism over carmakers' fuel-efficiency claims.

4.1 Air quality concerns

More than a third of motorists (34%) say they have concerns about the air quality near where they live, the 2016 Report on Motoring has found, with 37% saying they are not worried about this issue.

Meanwhile, specific concerns about the impact of vehicles on air quality appear to be on the rise: four in 10 drivers (41%) say they are more concerned about this issue now than 12 months ago, against 23% who say their concerns have reduced since last year.

Regardless of their views on local air quality, a clear majority of drivers (66%) believe that stronger action needs to be taken to reduce pollution from vehicles in the areas where air quality is at its worst, while a majority of motorists (57%) also support the introduction of charges for diesel vehicles which enter areas with poor air quality, unless they meet the latest emissions standards.

A similar percentage (55%) say they would support banning more polluting vehicles from entering areas with the worst air quality.



"People do want to see action to address the poorest emitting vehicles, but the problem is that they tend to be the older cars which are often owned by the least affluent consumers, who have the least opportunity to change either vehicle or transport mode."

MIKE HAWES
Chief Executive
Society of Motor Manufacturers and Traders

Drivers' views on polluting vehicles



55%

of motorists say they would support banning more polluting vehicles from entering areas with the worst air quality

57%

of drivers support the introduction of charges for diesel vehicles entering poor air quality areas



66%

of drivers agree stronger action needs to be taken to reduce pollution from vehicles in areas with the poorest air quality

4.0 Air quality and the environment

At the end of 2015, the Government announced plans²² to improve air quality in those English cities unable to meet EU air quality minimum standards by introducing a number of Clean Air Zones. This policy is likely to see the most polluting commercial vehicles charged for entering certain parts of Birmingham, Leeds, Nottingham, Derby and Southampton by 2020 – but the proposed approach is to target the greatest contributors to nitrogen dioxide emissions such as buses, taxis and commercial vehicles so owners of private cars may not be affected.

Most motorists (55%) support such proposals – only 12% say they are against them – with almost half (42%) saying they were already aware of the Government’s plans for Clean Air Zones.

The environmental proposal which receives the least support in the Report is for the introduction of charges for ‘all diesel vehicles’ entering areas with the poorest air quality: only 42% of drivers think this is a good idea against 30% who do not.

This is worth noting given the schemes introduced over recent years by certain local authorities, such as Islington in north London, which imposes surcharges for parking permits for all private diesel cars, regardless of how much they are used or whether they meet the most recent – and therefore most stringent – emissions standards²³.

Finally, there has been a small increase in the percentage of motorists who agree that the current level of motoring taxes is a ‘fair price’ for the environmental damage that vehicle use can cause: 35% now support this assertion (31% in 2015) against 31% who oppose it (34% last year).

Environmental concerns



of drivers support the Government’s proposal to establish Clean Air Zones where pollutant levels exceed safe standards



of drivers are unaware of plans for Clean Air Zones



of drivers support the introduction of charges for all diesel vehicles entering areas with the poorest air quality

of motorists do not think it’s a good idea to impose charges on diesel vehicle owners for entering the poorest air quality areas

agree that the current level of motoring taxes is a ‘fair price’ for the environmental damage that vehicles can cause

22. www.gov.uk/government/news/improving-air-quality-in-cities

23. <https://beta.islington.gov.uk/parking/parking-permits/diesel-surcharges>

4.0 Air quality and the environment

4.2 Choice of next vehicle

The environmental impact of motoring ranks low on the list of drivers' concerns in 2016: only 7% say this is one of their top four concerns. It comes as no surprise that there has been little change in the percentage of motorists who would consider a more environmentally friendly vehicle when thinking about their next car purchase.

More than half (51%) say they expect their next car to be petrol-fuelled (53% in 2015), while 28% will opt for a diesel (the same as in 2015). Only one in seven (14%) intend to opt for a conventional hybrid car, the same proportion as in 2015, while there has only been a very slight increase in the number of motorists who plan to buy a plug-in hybrid or extended-range electric vehicle (from 4% to 5%) and in the percentage who will opt for a pure electric battery-powered car (from 1% to 2%).



14% of drivers intend to opt for a conventional hybrid car

Driver attitudes to fuel types



of motorists say they expect their next car to be petrol-fuelled

of drivers say they will opt for a diesel when they buy their next car

plan to buy a plug-in hybrid or extended-range electric vehicle

Figures from the Society of Motor Manufacturers and Traders (SMMT) show that in 2015, sales of alternatively fuelled vehicles (AFVs), which include hybrid, plug-in hybrid and pure electric cars, rose by almost a third (32%)²⁴.



24. www.smmt.co.uk/2016/01/record-year-for-new-car-market-as-registrations-hit-2-6-million-in-2015/

4.0 Air quality and the environment

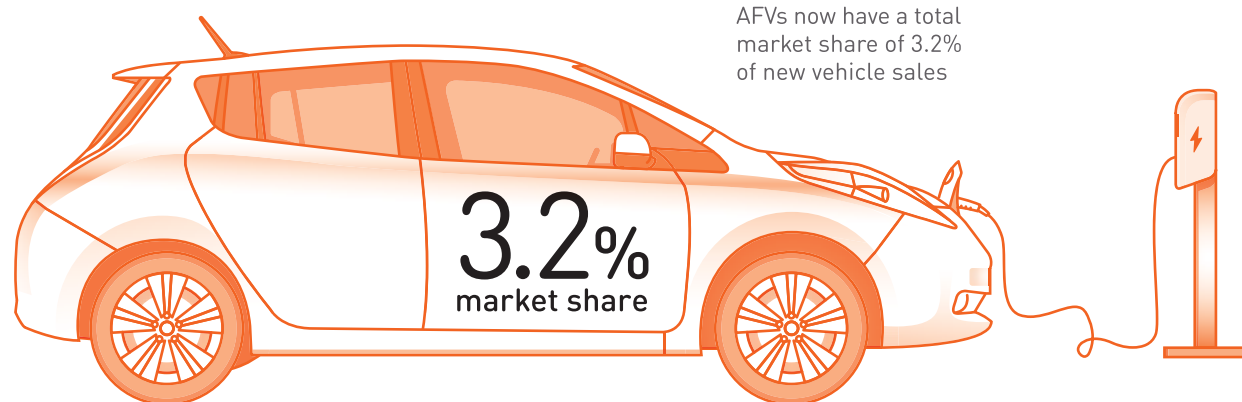
AFVs now have a total market share of 3.2% of new vehicle sales. Increases in sales of plug-in vehicles are likely to continue after the Government agreed to extend its Plug-In Car grant scheme until at least March 2018²⁵.

Increased awareness of the health risks associated with nitrogen dioxide and particulate emissions from diesel engines (see section 4.3) may be the reason some motorists say they will not opt for a diesel as their next car. This is despite today's diesels being the cleanest ever and emitting only a small fraction of emissions compared to previous generations of vehicles.

Four in 10 (41%) say they will avoid diesels, and of this group more than a third (35%) cite pollution as the main reason.

Of those who say they have reduced their car use, environmental reasons do not figure highly. For example, just under a third of drivers (28%) have opted to walk rather than use their cars at some point over the past 12 months but this was more likely to be due to personal (60%) or financial (19%) reasons than on environmental grounds (17%).

Alternatively fuelled vehicles



25. www.gov.uk/government/news/new-plug-in-grant-will-treble-number-of-greener-cars-on-britains-roads



28% 

of drivers have opted to walk rather than use their cars at some point over the past 12 months

4.0 Air quality and the environment

4.3 The emissions scandal and trust in manufacturers

In September 2015, government investigators in the United States found that Volkswagen had installed a 'defeat device' in certain diesel models, a type of software that could detect when the vehicle was undergoing a standard emissions test and temporarily reduce emission levels so as to meet the performance standard required by law²⁶.

As a result, thousands of cars which breached US emissions regulations are thought to have been sold.

Subsequently, it has emerged that the practice was also employed by VW in Europe, while other manufacturers have admitted that fuel-efficiency statistics can be misleading because of the inadequacies of the standard test that all manufacturers are required to use²⁷.

The 2016 Report on Motoring found that more than a third of drivers (35%) say their trust in the car manufacturing industry as a whole has fallen over the past 12 months against just 12% who say it has increased. However, motorists appear to have more faith in the company which makes their current vehicle: only 9% say their trust in the manufacturer of the car they own at the moment has declined, compared with 26% who report it has gone up.

35%



of drivers say their trust in the car manufacturing industry as a whole has fallen over the past 12 months

43%



of car owners who have lost trust in their current car's manufacturer no longer believe their emissions claims

Unsurprisingly, Volkswagen owners are more likely to have lost faith – almost a third (29%) said their trust levels were down. The most common reason given by owners who had lost trust in their current car's manufacturer is that they no longer believe their emissions claims (43% say this), while a quarter (25%) no longer think their carmaker's claims on fuel efficiency are credible.

26. www.bbc.co.uk/news/business-34324772

27. www.bbc.co.uk/news/business-36089558

4.0 Air quality and the environment

Another 25% said their diminished trust was due to their car's general quality not meeting their expectations, while one in five (20%) were unhappy that their vehicle had been recalled as a result of manufacturing faults.

Half of motorists (49%) are not sure whether they will stick with their current manufacturer when they next buy a car, but a third (30%) say they will switch brand. Only a fifth (20%) say they will definitely stick with their existing producer.

Of the 41% of motorists who say they will not buy a diesel as their next car, only 7% say this is because of the Volkswagen emissions scandal while 8% are deterred by the Government's plans to establish Clean Air Zones. Pollution (35%) and expected maintenance costs (24%) are far greater concerns.

Manufacturers have been aware for many years that EU standard emissions and fuel economy tests, upon which they are required to base figures quoted in their literature, are unrepresentative of real-world driving.

The emissions scandal has encouraged governments, legislators and the industry to accelerate the process of introducing better tests that are truly representative of a vehicle's performance in the real world.

The findings from this year's Report on Motoring suggest that for motorists, the new tests cannot come too soon and are an essential step towards the re-establishment of trust in motor manufacturers.

Motorists' views on their vehicle manufacturer



25% of drivers say their diminished trust was due to their car's general quality not meeting their expectations

20% of motorists say they were unhappy that their vehicle had been recalled as a result of manufacturing faults

30% of motorists say they are likely to switch brand when they next purchase

20% of drivers say they are likely to stick with their existing producer

49%

of drivers say they are not sure whether they will stick with their current manufacturer when they next buy a car

41%

of motorists say they are unlikely to buy a diesel as their next car



The emissions scandal has encouraged governments, legislators and the industry to accelerate the process of introducing better tests that are truly representative of a vehicle's performance in the real world

5.0

The car of the future

As the UK Government pushes ahead with plans to facilitate the introduction of driverless cars on to British roads, there is still a high level of uncertainty among motorists as to the benefits autonomous vehicles are likely to offer. Many drivers are also concerned about the potential risks presented by this new technology. >



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When will we see driverless cars? »



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Trust in technology »

5.0 The car of the future

The 2016 Report on Motoring found that the majority of drivers do not expect driverless cars to become available to the public before the end of the current decade.

However, there is widespread agreement that the driver-assistance technology used in existing vehicles is effective in making both cars and roads safer than in the past.

5.1 When will we see driverless cars?

In the Queen's Speech in May 2016, the Conservative Government set out its plans for a Modern Transport Bill, which will promote investment in driverless car technology and encourage insurers to develop policies appropriate for autonomous vehicles²⁸.

This is the latest demonstration of the UK's commitment to be a pioneer in the introduction of driverless vehicles: ministers say they think it is possible that by 2020, consumers will be able to buy cars which 'park on their own and pilot themselves on motorways'²⁹. Tests will begin on the strategic road network in 2017³⁰.

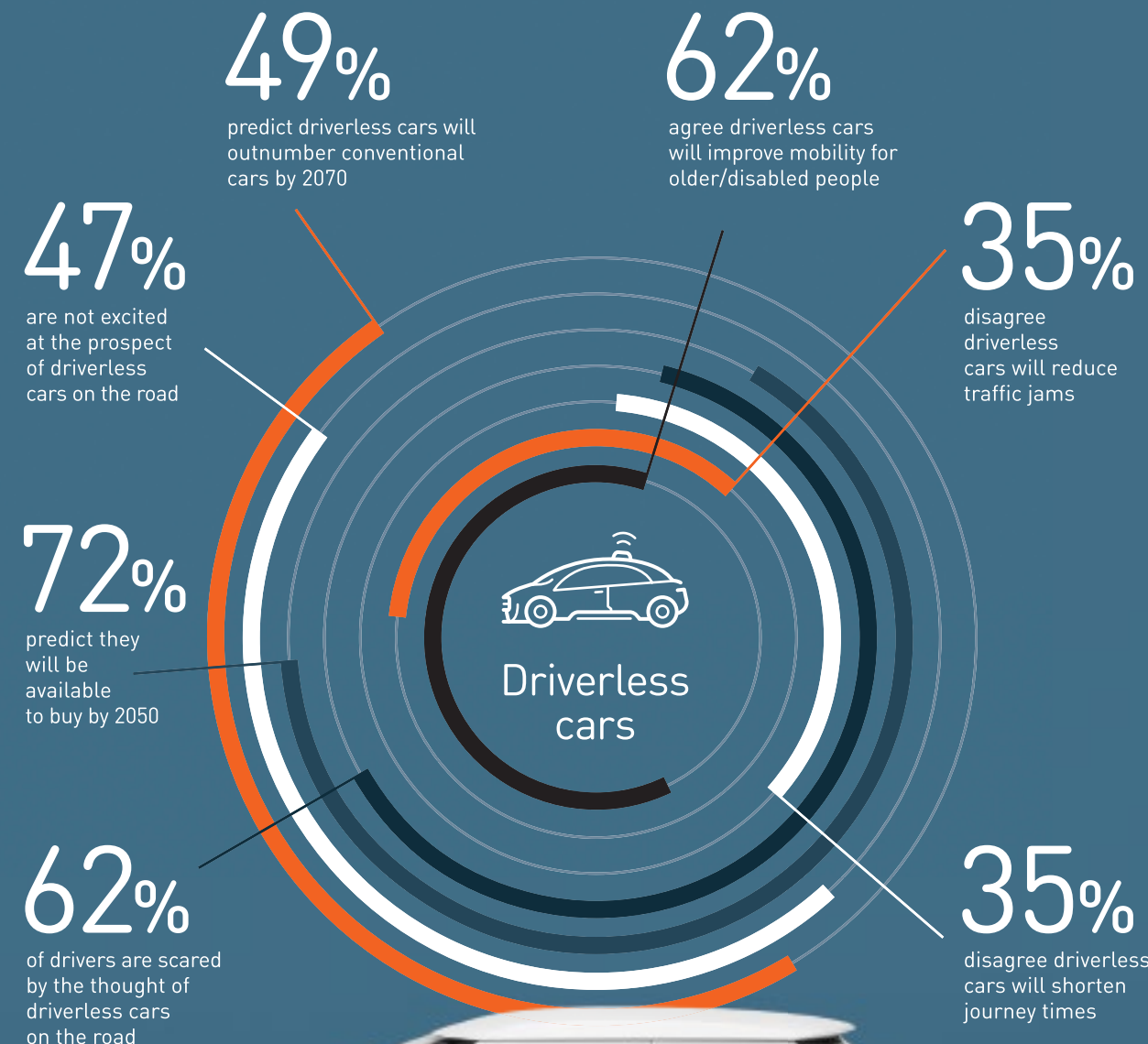


"There is quite a high level of concern about driverless cars being on the roads: 62% of motorists say they are scared of the prospect.

This just shows what needs to be done in terms of changing people's views – but it is worth pointing out that few people have qualms about jumping on a plane, which is flown – at least part of the way – autonomously."

MIKE HAWES
Chief Executive
Society of Motor Manufacturers and Traders

Motorists' views on driverless vehicles



28. www.bbc.co.uk/news/uk-politics-36320412

29. www.gov.uk/government/speeches/driverless-cars-are-the-future-not-science-fiction

30. www.theguardian.com/uk-news/2016/mar/12/george-osborne-driverless-car-trials-budget

5.0 The car of the future

While there has been a significant degree of news coverage both of these plans and of pilot schemes for fully autonomous vehicles currently underway in the United States, the 2016 Report on Motoring found that UK drivers are far less bullish when it comes to predictions of when such vehicles will actually appear on our roads.

Less than a quarter (24%) of motorists think that the first driverless cars will be available for consumers to buy before the end of the current decade. A third (34%) expect them to hit the market in the 2020s while a further 14% think such vehicles won't be available until between 2030 and 2050.

On average, drivers think that 2029 is when driverless cars will first become available in showrooms to buy – and a small minority (6%) think we will never see them on our roads.

The Report also asked motorists when they expect driverless vehicles to outnumber conventional models on our roads: a quarter (25%) say they do not know, while a significant proportion (17%) think this will never happen.

Fewer than one in 10 drivers (8%) think this tipping point will occur before 2030 while half (49%) expect it to take place before 2070.

Nick Walker, RAC Telematics Managing Director, said:

“With the prospect of driverless cars being commonplace some way off it would be wrong to ignore the immediate benefits of the connected car and the ability to offer drivers and fleet managers the opportunity to optimise their vehicle’s operation, economy and maintenance.

The RAC is at the forefront of developing the technological solutions to work with the multiplicity of motor manufacturers’ software and engine management systems to deliver tangible benefits in terms of safety, convenience and cost savings for business customers and this technology will soon be available for private drivers.”

34% 

of drivers expect driverless cars will become available for consumers to buy in the 2020s

21%  2040

of motorists expect driverless vehicles to outnumber conventional models by 2040



“The differences in opinion over when people expect to see driverless cars on the roads are quite striking. I think people forget what the lifetime of the average car actually is.

If you have a car with a typical life cycle of 12 years, and add in the fact that of those changing their car each year three-quarters buy a used rather than a new car, you can see that it could take a lot longer for driverless cars to become the norm. And then there will be the cost considerations.”

SARAH SILLARS
Chief Executive
IAM RoadSmart

5.0 The car of the future

5.2 Trust in technology

The Report also highlights that there is still a considerable amount of work to do to convince the public that the benefits of driverless vehicles outweigh the perceived risks.

There is a high and growing level of agreement (62% against 52% in 2015) that driverless cars will improve mobility for older and disabled people. But less than three in 10 (27%) think the introduction of driverless vehicles will make our roads safer (no change on last year). Experts regard improved safety as one of the primary benefits of driverless cars because driver error would become a thing of the past. However, the reputation of driverless cars has been severely dented by a recent fatal accident involving a driverless car in the US³¹.

Generally, there is a great deal of uncertainty and suspicion regarding new technologies in cars that affect drivers and their behaviour. More than two-thirds (69%) say they are

opposed to any new technology that has the potential to distract drivers, although this is down significantly from 75% last year. Just over half (51%) of motorists feel that many of the new technologies associated with autonomous vehicles will lead to complacency among drivers and therefore more accidents, but again this proportion has declined (from 59%) in the last 12 months. And almost half of motorists (49%) say they are not looking forward to travelling in a driverless car, while only a quarter (25%) say they are.

Motorists over the age of 65 are least likely to be enthusiastic about this prospect. Just 14% of this group say they are looking forward to using a driverless car, compared with 33% of those aged between 25 and 44. This is perhaps a reflection of younger generations being more accustomed to the fast pace of technological change.

Views on new technology

27%

agree driverless cars will make our roads safer



66%

of motorists are concerned about the risk of driverless car computers being 'hacked'

70%

of motorists say they are concerned about the reliability of the computer software driverless cars will use

31. www.independent.co.uk/life-style/gadgets-and-tech/tesla-crash-autopilot-driverless-model-s-death-experts-defend-technology-a7113431.html

5.0 The car of the future

In terms of other potential benefits, only a third (33%) of all motorists think that the adoption of driverless technology will be better for the environment and even fewer (28%) expect autonomous vehicles to ease the severity of traffic jams.

However, a significant proportion of motorists questioned on these two topics said they were unsure as to what effects driverless cars would actually have. Just one in five (21%) think driverless technology will lead to shorter journey times against 35% who do not and a further 35% who are not sure. A third of people (34%) think fewer people will use public transport when driverless cars are common (against 22% who disagree with this assertion) and 31% think fewer people will own their own car when driverless vehicles enter the mainstream (against 23% who don't).

The Government aspires for the UK to be a leader in connected and autonomous vehicles and for the economy to benefit from them.

A successful home market for such vehicles requires potential purchasers who are well informed, understand the user benefits, and are enthusiastic about the prospect of having a driverless car at their disposal.

The number of those who responded to this series of questions by saying that they did not know the answer suggests that in parallel with the technology and legislative programmes needed to pave the way for driverless cars, there is a need for a communications programme that informs and enthuses the motoring public.




“The fact that most motorists don't think that driverless cars will make roads safer and won't even have an impact on congestion is driven either by scepticism over what autonomous vehicles have to offer, or by a lack of understanding.”

DARYL LLOYD
Head of Road Safety Statistics
Department for Transport

The Report found that this lack of understanding also translates into a high level of concern about the potential risks of driverless technology. Seven in 10 motorists (70%) say they are worried about the reliability of the software that such cars will use, while two-thirds (66%) say they fear that the computer systems used by driverless cars could be hacked.



30% 
think fewer people will own their own car when driverless vehicles enter the mainstream

21% 
of motorists think driverless technology will lead to shorter journey times

5.0 The car of the future

Uncertainty and a lack of information can also stimulate other emotions and a majority of motorists (62%) confess to being scared by the thought of driverless cars on the road.

The Report also quizzed drivers about their attitudes to existing in-car technology and their responses contrast sharply with those for fully autonomous vehicles. There is widespread agreement (84%) that cars are safer today than in the past while 63% believe that driver-assistance technologies such as lane-departure warning or blind-spot monitoring are making roads less hazardous.

In terms of technology that records how well people are driving, for example via the black box recorders used in telematics insurance policies, there has been a marked shift in acceptance compared to 2010. Back then, the majority of motorists (58%) were opposed to any technology that allowed other people to monitor the movements of their vehicle whereas in 2016 only 33% of motorists say they are against such devices recording how well they are driving.

There is less opposition (23%) to systems which record data and images in the period before and during accidents, but resistance to such technology has increased slightly on the 21% seen in the 2015 Report.

The lessons are clear: where motorists understand technologies and value the benefits, they will welcome them and adopt them enthusiastically. But if the benefits of a new technology are poorly defined and users cannot easily place a value on them, there is a risk that such technologies will not appeal to mass markets and that take-up will be confined to a small number of technology enthusiasts.

84% 

of drivers are in agreement that cars are safer today than in the past

23% 

of motorists are opposed to systems which record data and images in the period before and during accidents



'Where motorists understand technologies and value the benefits, they will welcome them and adopt them enthusiastically...'

6.0 RAC calls to action



Cost of motoring

Fuel: While the cost of fuel has become less of a concern for motorists, the UK referendum vote to leave the EU has, and will continue to impact upon the value of the pound. With economic uncertainty remaining over the timing of withdrawal, the RAC urges the Government not to increase duty either before or after the mechanisms for formal withdrawal are enacted. This will cushion the impact of volatility in the pound-dollar exchange rate over this period.

Insurance: With the cost of insuring a car now a greater concern for motorists than the cost of fuel, the RAC seeks assurances from the Treasury that Insurance Premium Tax (IPT) will not be increased any further, following two recent rises. We also call upon the Government to bring forward its plans to clamp down on bogus whiplash claims to help protect motorists from further premium increases.

Road safety

Handheld mobile phones: Use of handheld mobile phones remains the biggest road safety concern among motorists, and while the Government is progressing the introduction of stiffer penalties, we call on all stakeholders to step up efforts to shift cultural attitudes, so as to make the use of handheld mobile phones as socially unacceptable as drink-driving.

Have your say:
#ROM2016
 on Twitter

Drink-driving: Despite there being no reduction in the numbers of motorists who admit to drinking and driving, it has dropped down the overall ranking of motorists' concerns over the last 12 months. The RAC calls on the Government and other road safety champions to remind motorists of the dangers of drink-driving.

A majority of motorists would like to see the drink-drive limit at 50mg/100ml or less across the whole of the UK and we urge the UK Government to draw on evidence from Scotland to review the merits of following the Scottish example and, if appropriate, reduce the limit in England and Wales from 80mg/100ml to 50mg/100 ml.

Speed limits: The rise in the numbers of motorists admitting to breaking the 50 & 60mph limits on country roads is a worrying trend, particularly as these roads are some of our least safe. The RAC calls upon the Government to extend the THINK! campaign to raise awareness of the dangers of inappropriate speeds on country roads and upon other road safety advocates to also seek ways to influence driver behaviour on this issue.

Enforcement: With compliance on some traffic laws such as speed limits and on the use of handheld mobile phones seemingly getting worse, the RAC calls for an end to cuts in roads policing and urges police and crime commissioners and chief constables to give greater priority to enforcement of road traffic laws.

6.0 RAC calls to action



The state of the roads

Local roads: The state of local roads remains one of motorists' top concerns. The RAC calls on the Government to recognise the importance of local roads as an essential component of the UK's transport infrastructure and ring-fence a proportion of motoring tax receipts to tackle the maintenance backlog and fund local improvement schemes. Such action should mirror that already taken to fund the development and maintenance of the strategic road network and would reflect the importance of local roads to economic growth.

Strategic road network: With increasing concern among motorists regarding congestion and less predictable journey times, the RAC calls on the Government and Highways England to continue prioritising both the delivery of the Road Investment Strategy (RIS 1) on time and within budget and the development of the second Road Investment Strategy (RIS 2), effective from 2020/21.

The RAC also calls on Highways England to further improve the quality and accuracy of the information provided to network users on major incidents, prioritising location, estimated delay time and the fastest alternative route.

Parking: Motorists are more concerned about parking availability and cost than 12 months ago and the Government has been slow to respond to the Department for Communities and Local Government discussion paper on parking practices. We urge the Government and local authorities to recognise the important role that parking fulfils in the health of local high streets, on employment and on local communities and to reflect this in both parking provision and the associated legislative framework.

Have your say:
#ROM2016
 on Twitter

Environment

Air quality: Motorists are concerned about poor air quality, particularly in their local area and the RAC calls on the Government to move forward rapidly to implement the air quality strategy published in 2015. We also call upon those local authorities implementing Clean Air Zones to do so in line with the framework defined in the strategy, to target only the most polluting vehicles, and to do so in a way that is not punitive for owners of smaller, more modern diesel vehicles, many of whom believed their choice to be environmentally sound because of the low carbon dioxide emissions of such vehicles.

Autonomous vehicles

Driverless cars: There is still a poor understanding of the potential benefits of connected and autonomous vehicles among motorists with many sceptical and some fearful of the prospect of driverless cars on UK roads. A receptive and enthusiastic home market would benefit the UK's economic success in this emerging market and the RAC therefore calls on the Government and the motor industry to inform and engage with motorists so that they better understand the benefits of such vehicles.

Join the debate today

Follow the conversation on Facebook and Twitter:

 RAC
on Facebook

 @TheRAC_UK and @RAC_Press
on Twitter

Share your thoughts directly with us, use
#ROM2016 on Twitter

7.0 Who is the motorist?

Miles per year*



0-5,000 miles	34%
5,001-10,000 miles	33%
>10,001 miles	22%

Average mileage (all motorists)



09101

Miles

Number of cars per household



Households with one car	53%
Households with two cars	34%
Households with three cars	10%
Households with four cars	3%
Households with five or more cars	1%

Average number of cars in household	1.6
Average number of cars in ABC1 households	1.8
Average number of cars in rural households	1.8
Average number of cars in city households	1.5

Age of vehicles



Average age of vehicles in 2016	4.7 years old
Motorists who own a car less than a year old	17%
Motorists who own a car 1-2 years old	14%
Motorists who own a car 2-3 years old	14%
Motorists who own a car 3-4 years old	14%
Motorists who own a car between 5 and 10 years old	25%
Motorists who own a car more than 10 years old	15%

*The remaining 11% responded by saying they do not know how many miles per year they complete

8.0 Appendix

8.1 Research methodology

The RAC Report on Motoring 2016 is based on a large-scale internet survey carried out by Quadrangle on behalf of the RAC.

In total, Quadrangle interviewed 1,714 British motorists (i.e. those who hold a current driving licence and drive at least once a month). The survey was conducted in May 2016, with the questionnaire taking around 25 minutes to complete.

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

8.2 Statistical reliability

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown are an estimate, within a small margin of error, of the actual figures. The error margin varies with the sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering so the error is lower for a 90/10 result than for a 50/50 result. In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with different sample sizes from the car drivers' survey. For example, from a sample of 1,000, if 50% answered in a particular way, we would be 95% confident that the true range is between 47% and 53%.

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



9.0 Company overview

Contacts

With 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.

In its role as the motorist's champion the RAC campaigns to support the interests of its members and UK motorists at a national level, including advancing levels of road safety, supporting the needs of young drivers and voicing concerns about the increasing cost of motoring.

The RAC is committed to making motoring easier, safer, more affordable and more enjoyable for drivers and other road users. Many of the organisation's products and services aim to do just that: the RAC Cars website allows anyone to sell their car free of charge, the RAC Vehicle Check gives would-be buyers valuable insight into a vehicle's past and RAC telematics helps make insuring a car more affordable for young drivers.

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

Advisory Panel

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

Chaired by David Bizley,
Chief Engineer, RAC

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

Stephen Joseph, Chief Executive,
Campaign for Better Transport

Sarah Sillars, Chief Executive,
IAM RoadSmart

David Leibling,
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Graeme Paton, Transport Correspondent,
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Theo de Pencier, Non-executive Board
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