

RAC

RAC Report on Motoring 2017

Feeling the squeeze





RAC Report on Motoring

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Foreword

Ross Brawn OBE

I am delighted to introduce the RAC's 29th annual Report on Motoring. For decades, Formula 1 has led the way in developing and utilising technologies that have benefited motorists.

I have been fortunate to play a part in this technical journey while at Benetton, Ferrari, Honda and Brawn GP. In my new role as F1 Managing Director of Motorsports I have the opportunity to influence the future agenda to ensure that F1 technology continues to benefit the wider motoring community.

Today, the number of fatalities on Great Britain's roads is half of what it was at the end of the last millennium and less than a quarter of that in 1966, when of course there were far fewer vehicles on our roads. While many factors have contributed to this success story, the ability to design cars in a way that reduces the risk of a driver losing control in difficult conditions has certainly lessened the likelihood of collisions. And today's cars are designed to absorb the impact and protect occupants and pedestrians when collisions do occur to improve the chances of survival. Both of these developments owe much to motorsports and F1.

Similarly, telemetry has for many years been an essential part of F1 linking cars in real time to their support teams both at the track side and back in the team's engineering headquarters. And it is similar

telematics technology that is now starting to help motorists drive in a safer, more affordable way and alerting organisations like the RAC to vehicle faults before they cause a breakdown.

Last year's Report highlighted the epidemic of drivers using handheld mobile phones while driving and the last government responded to this by increasing penalties and stepping up communications via the THINK! campaign. Driver distraction through the misuse of new technology is a constant risk.

F1 drivers cannot afford to lose concentration for a moment and therefore designers have had to think hard about how they can introduce ever more sophisticated systems into vehicles while ensuring that they can be used and optimised for the prevailing conditions by the driver without any loss of focus on the race. I am sure there are lessons for the designers of today's passenger cars.

The 2017 motoring agenda is dominated by concerns about the harmful effects of vehicles' exhaust emissions on air quality. Motor manufacturers have dramatically reduced emissions of both harmful pollutants and CO₂ over the last

15 to 20 years but there is more to do. The current generation of Formula 1 petrol engines are recognised as the most efficient on the planet and there is more to come. I am very proud that F1 has set an example in the use of hybrid technology. The introduction of regenerative braking through Kinetic Energy Recovery Systems (KERS) back in 2009 led the way in recovering energy while braking and then storing and releasing the energy to improve performance and efficiency, something that is increasingly common in today's mass market vehicles.

Today's plug-in hybrid production cars offer a genuine alternative to a pure diesel or petrol engine for the family motorist and like KERS can contribute to the vehicle's performance as well as its environmental footprint. Driving can still be fun as well as environmentally responsible.

The launch of FIA Formula E suggests that motorsport is still evolving in a manner relevant to society and I am confident that the technology behind this will help to make pure electric vehicles a practical and affordable proposition for everyday motoring.

The research for this year's Report on Motoring again demonstrates that motorists recognise the need to improve air quality in our towns and cities and technology developed for motorsports can help realise this.

In this the RAC's 120th anniversary year, I am pleased to commend the 2017 RAC Report on Motoring to you.

Ross Brawn OBE




Executive summary

With more than 38 million motorists in the United Kingdom¹, it is of vital importance that Britain's politicians, transport authorities and motor industry take their views into account when it comes to shaping policies and plans for the future.

The 2017 Report on Motoring once again covers a wide range of subjects – from perennial hot topics such as fuel prices and speed limits, to more contemporary issues like handheld mobile phone use and the perceived impact of diesels on air quality – to paint a comprehensive picture of drivers' attitudes and concerns in the UK today.

In addition, the Report compares current findings with data collected over recent years to illustrate how those attitudes and concerns are changing over time.

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

Here is a summary of the key findings in the 2017 Report:

Motorists' number one concern is now other drivers' use of handheld mobile phones while at the wheel.

Irresponsible and illegal behaviour by other drivers causes a considerable level of concern among many of the motorists surveyed for this year's Report on Motoring. The use of handheld mobile phones to talk, text, take pictures or videos, or access the internet, has been cited by **16%** of respondents as their top concern in 2017. This is a significant rise on the **13%** recorded in 2016.

There are encouraging signs in terms of drivers' own mobile phone use at the wheel: the proportion of motorists who admit to using handheld phones while driving or stationary with the engine running has declined from **31%** to **23%**, though the decline was largely amongst occasional rather than frequent users.

There is generally a high level of awareness of the Government's increased penalties for handheld mobile use – which were brought forward as a direct result of findings in the 2016 Report on Motoring that showed widespread disregard for the law.

It is likely that the media focus on this issue, as well as the Government's decision to bring in stiffer penalties, has played a part in improving drivers' behaviour.

Motorists feel financially squeezed with rising concerns over the cost of filling up and further increases in insurance costs.

Rising petrol and diesel prices over the winter of 2016-17 have driven an increase in concern over fuel costs: this year, **9%** of motorists say this is their top concern compared with **7%** in 2016, while **28%** say the cost of filling up is a top-four concern, as opposed to **25%** 12 months ago.

Rising inflation and the failure of wage increases to keep pace have meant that drivers are feeling increasingly squeezed in financial terms. With industry figures showing premiums are on the up, the cost of motor insurance is the top concern for **8%** of drivers in 2017 (the same proportion as last year) but the percentage that say insurance prices are a top-four concern has risen to **28%** from **26%**.

Meanwhile, a rising number of motorists say their car tax bills and maintenance costs have increased over the past year.

The condition and maintenance of local roads has fallen from its 2016 ranking as drivers' top concern.

Concern over condition of local roads has fallen back in 2017, with **10%** of motorists naming this as their top worry against **14%** a year ago. Nevertheless, just over half (**51%**) believe that the state of roads in their area has worsened in the past 12 months, and this proportion has not changed since 2016.

Alongside potholes, factors such as inadequate street lighting and safety barriers have received a greater share of the blame for deteriorating road conditions. While industry research suggests that the backlog in local road repairs and maintenance has not reduced, the RAC's own Pothole Index, based on analysis of breakdown data, adds further evidence of a small improvement. However, it is not clear whether this is because councils are becoming more efficient in allocating maintenance spending or simply that we have had less rain and fewer frost days this winter than in previous years.



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

Executive summary

There has been a further small rise in concern regarding congestion and increased journey times.

With government figures indicating a rise in traffic volumes in 2016, it is not surprising that **concern over congestion and journey delays has increased**: this year, **8%** of motorists say this is their top concern compared with **7%** a year ago.

Respondents say that congestion has worsened to the greatest degree on Britain's motorways, with drivers blaming roadworks, middle-lane hogging and heavy-goods vehicles overtaking one another for the deterioration.

Most motorists say they would use public transport more but are put off by high fares and lack of coverage.

The proportion of motorists who admit to breaking the speed limit has fallen.

Fewer drivers are claiming to break the speed limit in 2017, with **66%** saying they frequently or occasionally exceed the motorway 70mph limit compared with **70%** in 2016. For urban 30mph areas, the rate has fallen from **44%** to **39%**. We have yet to see evidence from other sources that support this, but generally government statistics on speeding run 12 months in arrears so are not yet available for comparison.

There is still majority support for raising the motorway speed limit, but this has fallen back a little from **65%** to **62%** over the past 12 months. Meanwhile **a considerable minority of motorists would like to see 20mph limits increased** – but again, this proportion has fallen back since 2016, from **41%** to **39%**.

Concern about the threat posed by drink-driving remains high.

The 2017 Report also found that **there has been a small rise in concern about other motorists driving under the influence of alcohol or drugs**. Drink-driving is the top concern among **7%** of respondents, up from **5%** in 2016. Overall, **24%** say drink-driving is one of their top four concerns this year compared with **22%** in 2016, while **19%** cite drug-driving as a top-four concern – up from **17%**.

The proportion of motorists who admit to driving under the influence of alcohol has fallen from **20%** in 2016 to **16%** this year, with men and city dwellers most likely to admit to the offence.

The Report has found that **more motorists who admit to drink-driving this year believe they have done so as the result of being over the limit the morning after a drinking session than shortly after drinking**.

As previous Reports have found, a majority support a cut in the legally permitted blood-alcohol level in England, Northern Ireland and Wales to 50mg/100ml or less.

A significant percentage of motorists have concerns about pollution and the air quality in their local area.

Almost a third of drivers say they are worried about their local air quality – a slight fall on 2016 – but **40%** say such concerns have increased in the past 12 months showing that there is growing disquiet about the general situation, even if this does not extend to a concern about the area in which a respondent lives.

Most motorists are aware of the Government's plans to establish urban clean air zones, and there is strong support for action to be taken to ban the most polluting vehicles from such areas. However, a majority of drivers do not back policies that penalise all diesel vehicles irrespective of how old they are or how much they are contributing to the problem.

In light of emerging plans in London and elsewhere to impose extra charges on at least some diesels for entering the more polluted areas and for parking, there has been a sharp fall in the proportion of motorists (from **28%** to **16%**) who intend to choose a diesel car when they next buy a vehicle.

However, **there has been only a small rise in the relatively small percentage who plan to buy an alternatively fuelled vehicle** such as a plug-in hybrid, pure electric or even hydrogen fuel cell car.



1.0

What's on motorists' minds?

The period since the EU referendum in June 2016 has been characterised by a degree of political and economic uncertainty in the UK. In recent months, this has manifested itself in an indecisive general election result as well as in rising inflation, which has now overtaken average wage growth, and slower-than-expected economic growth. >



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1.0 What's on motorists' minds?

These economic jitters, coupled with a rise in the price of fuel and widespread hikes in motor insurance premiums, have pushed the overall cost of motoring back up the list of motorists' main concerns.

Other issues are also causing significant levels of worry: there is still considerable disquiet about the state of local roads, while the leading concern in 2017 is the danger caused by other motorists'

irresponsible and illegal use of handheld mobile phones while behind the wheel.

Meanwhile, dissatisfaction at the levels of congestion on British roads appears to be on the rise, as does concern about drivers under the influence of alcohol. And while the issue does not rank particularly highly among drivers' major worries, there is greater awareness of – if not outright concern about – the environmental impact of motoring.

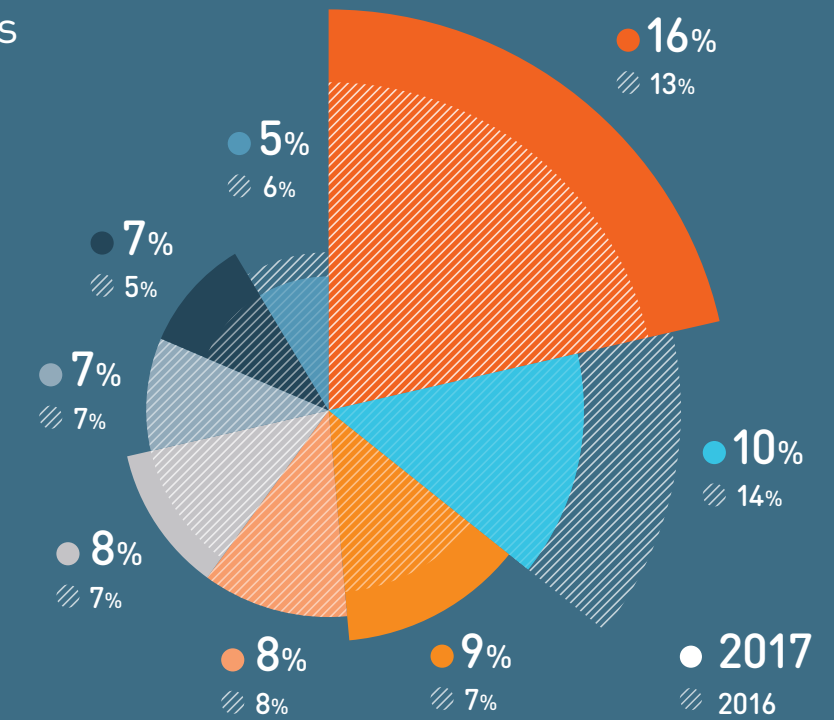


"Among our members, the key issues at the moment are driver distractions – such as mobile phones as well as in-car technology – and increasing congestion. Potholes and problems with the condition of roads are just slightly behind as current concerns."

SARAH SILLARS
Chief Executive
IAM RoadSmart

Motorists' top concerns

- 1 Drivers using handheld phones to talk, text or access the internet
- 2 The condition and maintenance of local roads
- 3 Cost of fuel
- 4 Cost of insuring a car
- 5 Traffic congestion/slower journey times
- 6 People driving cars without tax or insurance
- 7 Drivers under the influence of drink
- 8 Drivers breaking traffic laws



1.0 What's on motorists' minds?

1.1 The rising cost of motoring

The fall in the value of sterling in the wake of last year's EU referendum decision has played a role in pushing up fuel prices and generally squeezing motorists' finances.

A weaker pound has driven up the cost of imports in general, not just oil prices, resulting in levels of inflation that we haven't seen for four years: with earnings levels struggling to keep pace, the typical UK worker has recently started to see their wages decline in real terms².

While petrol and diesel prices have reached nowhere near the highs experienced in 2012 and 2013, they have been considerably higher than in the period covered by last year's Report on Motoring. It is no surprise, then, that the cost of fuel has been named by significantly more respondents as their top concern in 2017 (9%) than in 2016, when the rate was 7%.

Overall, 28% of drivers place fuel expenditure among their top four concerns in comparison with 24% a year ago.



28%

of drivers place fuel expenditure among their top four concerns

9%

of motorists say the cost of fuel is their top concern in 2017

2. www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/articles/supplementaryanalysisofaverageweeklyearnings/latest

1.0 What's on motorists' minds?

These increases mean that the cost of fuel has overtaken insurance prices, and is now the third biggest concern in 2017: nonetheless, 8% of the drivers questioned this year say motor premiums are their top concern, unchanged from 12 months ago. Similarly, 28% of motorists name insurance costs as a top-four concern this year compared with 26% in 2016 and just 18% a year earlier.

While the general squeeze on incomes is no doubt to blame for some of this increased concern, industry data does bear out the perception that premiums are rising – not least as a result of recent government changes to the way life-changing personal injury compensation claims are calculated and increases in insurance premium tax³.

In terms of other motoring-related expenses, the cost of parking has been named as a top-four concern by 17% of respondents – a slight fall from 18% last year – while a higher proportion of drivers than in 2016 feel that running costs such as vehicle excise duty (VED) and general maintenance or repairs have risen in the past 12 months. The issues described in this section, as well as general attitudes to motoring taxation, will be explored further in the next chapter.



“Concern around the cost and availability of parking appears to be waning, which perhaps is a reflection of the fact that motorists are wiser to the tactics of parking enforcement officers and may be taking appropriate precautions.

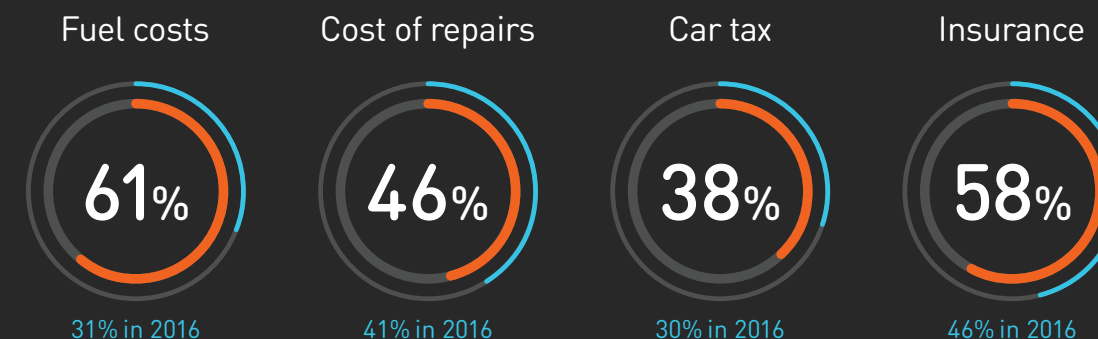
There are so many apps out there that can flag up the availability of cheap parking – and allow you to pay at the tap of a button – that maybe it's no longer the issue that it once was. It may also be that the last Government's focus on parking, including a ban on councils ticketing motorists within 10 minutes of parking time expiring, and the eradication of clamping on private land, is also starting to have an impact.”

GRAEME PATON
Transport Correspondent
The Times

3. www.abi.org.uk/news/news-articles/2017/04/up-8-motorists-face-bumpy-ride-as-motor-insurance-premiums-continue-rise/

Running costs

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



17% 

of respondents name the cost of parking as a top-four concern

1.0 What's on motorists' minds?

1.2 Growing safety concerns

The irresponsible and potentially life-threatening behaviour of other drivers remains an issue of significant concern for British motorists at the moment.

The issue most commonly cited as a number one concern in 2017 is drivers using handheld mobile phones to talk, text, take pictures or access the internet: 16% of respondents say this is their top concern, which represents a significant increase on the 13% who did so 12 months ago.

In total, 40% of motorists name handheld mobile use as a top-four concern, very similar to the 41% recorded in 2016.

A considerable number of this year's other leading concerns relate to inconsiderate and illegal behaviour at the wheel. There has been a rise in the proportion of motorists whose chief concern is drivers under the influence of alcohol: 7% say this is their top concern, up from 5% in 2016, while in total 24% name drink-driving as a top-four concern (the equivalent figure in 2016 was 22%). Drug-driving is the top concern for 4% of the motoring population and a top-four concern among 19% (17% in 2016).

One in 20 motorists (5%) say that other drivers' failure to adhere to traffic laws is their top concern. This is down from 2016's 6%, although overall concern relating to this issue – that is, the number of people who named this as one of their four main concerns – has risen to 25% from 23%.

A sixth of motorists (17%) say that the behaviour of cyclists on the road is a top-four concern – a similar proportion to last year's 18% – while there has been a slight fall in overall concern about other drivers' rudeness (from 21% to 19%).

We will examine these issues, as well as attitudes to in-car safety technology, speeding and speed restrictions, in more detail in Chapter 3 of this Report.



of motorists say that other drivers' failure to adhere to traffic laws is their top concern



of motorists chief concern is drivers under the influence of alcohol



of motorists named drivers using handheld mobile phones as their top concern



1.0 What's on motorists' minds?

1.3 Local roads and congestion

The condition and maintenance of local roads – as opposed to dual carriageways or the motorways and other major routes that make up the UK's strategic road network – remains an important concern for motorists, but perhaps not quite to the same extent as in 2016.

Last year, the state of local roads was the most commonly named top concern, with 14% citing it as their biggest issue: this year, however, that figure has fallen sharply to 10%. Nevertheless, the condition of local roads is still the second most significant concern – behind handheld mobile phone use – in 2017.

In a similar way, overall concern about local road conditions has fallen: now 33% say this is a top-four issue compared with 38% who did last year.

While these figures suggest conditions may be improving, it is worth bearing in mind that year-on-year changes in relative concern rankings can be the result purely of increased concern about other issues. Interestingly, 51% of respondents in this year's survey say the condition of roads in their area has worsened over the past 12 months – exactly the same proportion as recorded in 2016.

Nevertheless, motorists' slightly more relaxed view of the state of local roads in 2017 does tally with findings from the RAC's Pothole Index, as we examine in Chapter 4 of this Report.

Over the past 12 months, there has been no change in levels of concern regarding the condition of dual carriageways and motorways: 12% of drivers still cite this as one of their top-four main concerns.

There has been a small rise in concern about traffic congestion and slower journey times: 8% of drivers say this is their biggest concern this year compared with 7% in 2016: this view is consistent with figures from the Department for Transport⁴, which suggest that there was a 2.2% increase in traffic volumes in 2016 to a record total of 323.7 billion miles driven.

Overall, 26% of motorists feel that congestion and increased travel time is a top-four concern, against 27% last year.

10% 

of motorists cited the state of local roads as their top concern

51% 

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

8% 

of drivers say traffic congestion and slower journey times is their biggest concern

4. www.gov.uk/government/uploads/system/uploads/attachment_data/file/611304/annual-road-traffic-estimates-2016.pdf





1.0 What's on motorists' minds?

1.4 Untaxed and uninsured drivers

The issue of motorists driving without tax or insurance has been a perennial concern in recent years: in 2017, 7% of respondents cite this as their top concern, the same percentage as in 2016 and 2015.

In overall terms, untaxed and/or uninsured drivers is the third most significant overall concern, with 29% of motorists placing this within their four biggest concerns.

It may be that rising insurance premiums, as well, perhaps, as the switch away from the paper tax disc since October 2014, have underpinned the ongoing high levels of concern in these areas.

Some analysts have warned⁵ that the recent rises in insurance premium tax could lead to more people taking the risk of driving without cover, despite it being illegal. Such warnings may lead to increased fears of uninsured drivers among law-abiding motorists.

Meanwhile, the number of cars clamped by the DVLA for failing to pay VED has risen sharply since the paper tax disc was phased out in 2014: the agency says that it has increased its enforcement efforts to ensure that drivers 'get the message' that they still need to tax their vehicles⁶. Again, widespread media coverage of the DVLA's enforcement activity may exacerbate fears that many cars on the road are untaxed – irrespective of actual levels of tax evasion.

29% 
of drivers say that motorists driving without tax or insurance is one of their top four concerns

5. www.ft.com/content/0b058f56-46d0-11e7-8519-9f94ee97d996

6. www.bbc.co.uk/news/business-38389577

1.0 What's on motorists' minds?

1.5 Air quality and the environment

Despite widespread media coverage relating to the environmental impact of motoring and government air quality strategies, concern over such matters remains relatively low relative to the issues highlighted so far in this chapter.

Less than one in 10 motorists (9%) rate the environmental impact of car use as a top-four concern in 2017, although this is a rise on the 7% figure recorded both last year and in 2015.

There has been a minimal increase in concern about the effects of diesel emissions on health – 7% say this is a top-four concern this year compared with 6% in 2016 – while the same proportion are worried about the fuel efficiency and emissions claims made by vehicle manufacturers.

When analysed in isolation rather than compared with other issues, however, environmental concerns do appear to be fairly widespread: 32% of motorists

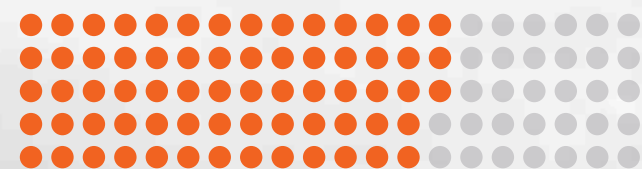
this year say they are concerned about their local air quality (down marginally from 34% who had this view in 2016), while 40% are more concerned than they were a year ago about the impact vehicles have more generally on their local air quality.

There is also a significantly higher level of awareness about government plans to establish clean air zones in areas where pollution is highest – 56% say they have heard about such measures, up from 43% in 2016.

This in part could be explained by the volume of media coverage of the High Court ruling that the Government's original air quality strategy was inadequate and required improvement.

Motorists' thoughts about the environment, as well as issues such as the Government's attitude to diesel-powered vehicles and drivers' engine preferences, will be discussed in more detail in Chapter 5 of this Report.

The local environment



68%

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



43% in 2016

of drivers are aware of the Government's proposal to establish clean air zones in towns and city areas. A 13% increase from last year's stats



55% in 2016

of motorists agree with the banning of more polluting vehicles from entering areas with the poorest air quality. A 2% increase from last year's stats



2.0

The squeezed motorist

Slow growth in earnings over the past 12 months, allied to price increases, has put motorists under greater financial pressure – a state of affairs that the results of the 2017 Report on Motoring bear out. >



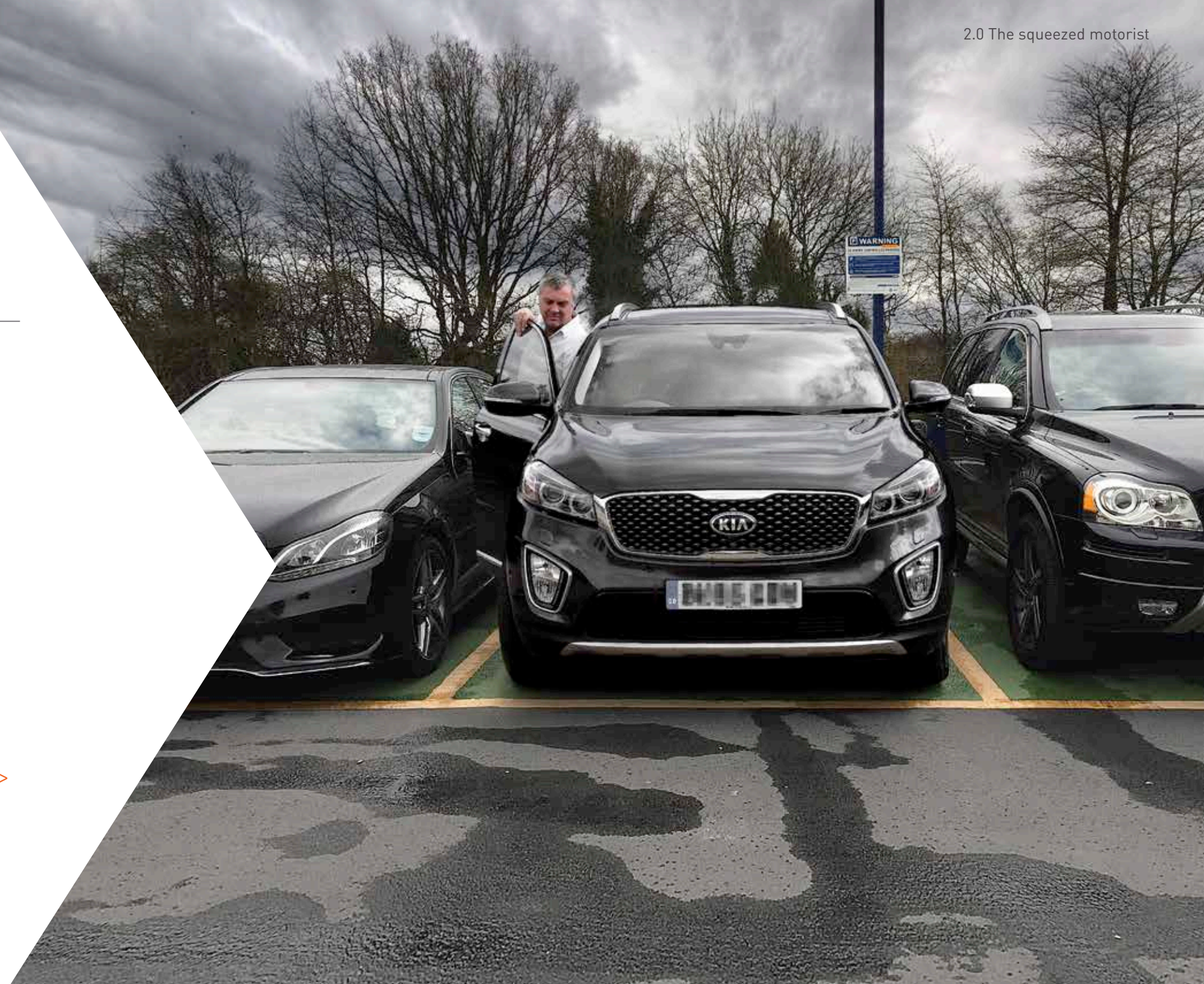
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2.0 The squeezed motorist

Concern about the cost of fuel has risen sharply since last year's Report, and drivers also say they are spending more on insurance premiums, car tax and maintenance than in 2016.

Arguably, one of the key factors underpinning the economic downturn has been the fall in the value of sterling in the wake of the June 2016 EU referendum. On the day of the referendum, the pound was trading at \$1.50: 12 months later, it stood at \$1.27, a loss of more than 15%.

Sterling's weakness has been a reflection of money-market fears that UK interest rates will remain low for longer than previously expected – indeed, the base rate was cut to 0.25% in August 2016 – and that economic growth in Britain could be hampered by the uncertainty surrounding the Brexit process.

The impact of the weak pound has been widespread: with crude oil priced in dollars, it has led directly to a rise in fuel prices, as we will discuss below. But the rise in the cost of imports in general has prompted a sharp upturn in inflation, which hit 2.9% in May, the month when the survey was carried out – well ahead of the Bank of England's Consumer Prices Index target of 2%.

With average wages rising more slowly than prices, the result is that consumers' real earnings have started to fall in recent months for the first time in three years⁷. Meanwhile, there are signs that the economy is not growing as fast as previously expected, with estimates for GDP in the first three months of 2017 having to be revised downwards from 0.3% to 0.2% by the Office for National Statistics⁸.

On the day of the EU referendum (23 June 2016), the pound was trading at \$1.50. 12 months later, it stood at \$1.27, a loss of more than 15%.



June 2016: £1=

\$1.50

June 2017: £1=

\$1.27 **-15%**

7. <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/articles/supplementaryanalysisofaverageweeklyearnings/latest>

8. <http://www.bbc.co.uk/news/business-40042427>



2.0 The squeezed motorist

The cost of insuring a car is still a major concern and most of the motorists surveyed for the Report on Motoring 2017 say their premiums have increased in the past 12 months – a view borne out by insurance industry figures⁹, with hikes fuelled at least partly by tax rises and changes in compensation payment rules for cases involving life-changing injuries.

The reforms in the vehicle excise duty (VED) regime for new cars has resulted in higher car tax bills for nearly all popular models, but although the rules only apply to vehicles registered since 1 April 2017, media coverage of the changes may have given rise to the general perception that road tax bills are on the up.

Meanwhile, this year's Report has found that almost half of drivers (46%) have seen their maintenance and repair bills increase over the past 12 months – a sharp rise on the 41% who reported higher servicing charges in 2016.

If general motoring costs continue to rise, it could result in significant changes in behaviour, the Report suggests: 46% of respondents say that motoring could become a rare luxury if these expenses increase further. This figure is higher still for drivers aged under 25 as well as for those who live in London – 57% in both cases.

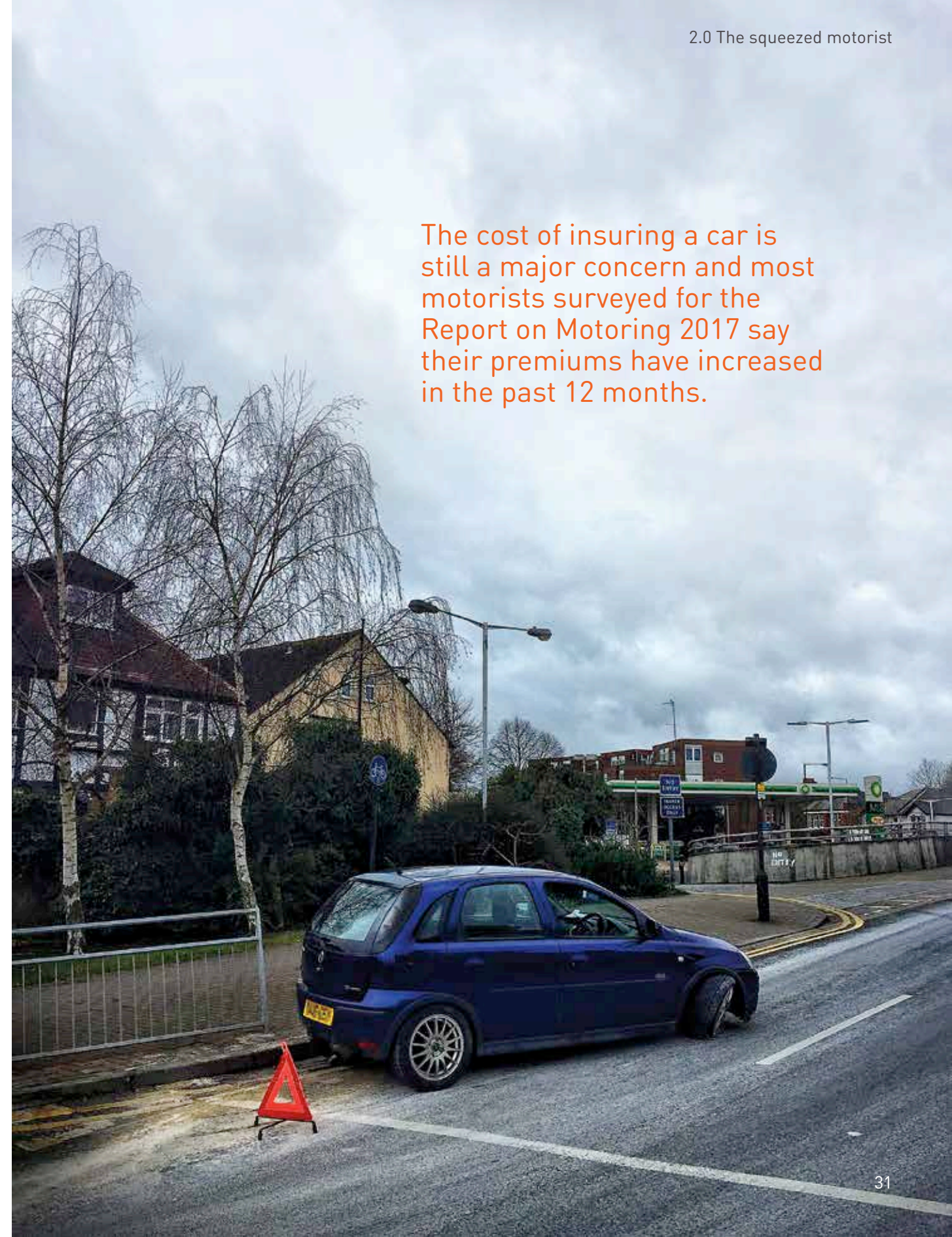
46% 

of respondents say that motoring could become a rare luxury

46% 

have seen their maintenance and repair bills increase over the past 12 months

9. www.consumerintelligence.com/press-releases/car-insurance-accelerates-as-compensation-rules-bite



The cost of insuring a car is still a major concern and most motorists surveyed for the Report on Motoring 2017 say their premiums have increased in the past 12 months.

2.0 The squeezed motorist

2.1 The impact of rising fuel prices

Given the change in the price of both petrol and diesel over the past year¹⁰, it comes as little surprise that motorists say the cost of filling up is a significantly greater concern in 2017: 9% say it is their top concern, against 7% in 2016, while 28% say it is a top-four concern (compared with 25% in 2016).

At the time that the 2016 Report on Motoring survey was carried out, the price of both petrol and diesel was rising slowly from lows of almost £1 per litre in February 2016 – the cheapest rate in the UK in more than six years.

In contrast, average petrol prices have generally been no cheaper than 115p per litre since the start of 2017, with diesel typically a penny or two dearer.

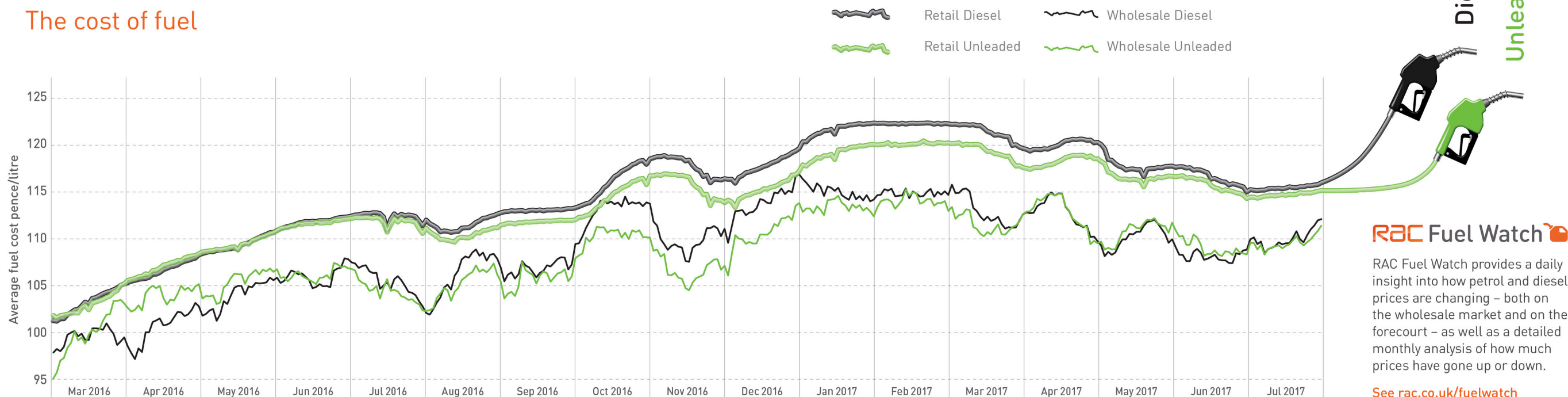
This price increase over the last 12 months has been caused by an overall rise in the dollar price of crude oil as well as a weaker pound. Over the course of last winter, a barrel of crude rose to around \$55 – its highest price in almost 18 months – pushing petrol pump prices to 120p per litre and diesel to over 122p during January, February and much of March 2017.

Crude oil prices last winter were propped up by the decision by the Organisation of the Petroleum Exporting Countries (OPEC) at the end of November to restrict the supply of oil. But since March, these efforts have been offset to some extent by increased production in the United States, chiefly through an expansion of fracking activity.

It has been a long-standing complaint of motorists that retailers are quick to pass on rises in wholesale prices to their customers, but less willing to cut prices in response to a reduction in wholesale prices.

Unfortunately, wholesale and retail prices monitored by RAC Fuel Watch give reason to believe that forecourt operators have been too slow to pass on savings in the wholesale fuel price to motorists at the pump, perhaps taking advantage of consumer concern about Brexit, the weaker pound and the general election.

The cost of fuel



RAC Fuel Watch

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

See rac.co.uk/fuelwatch

Source: Experian Catalyst

10. www.rac.co.uk/drive/advice/fuel-watch/

2.0 The squeezed motorist

Motorists have once again benefited from the Government's decision to extend the freeze on fuel duty: in last November's Autumn Statement, Chancellor Philip Hammond said it would not increase before 2018.

Analysis has shown that the freeze, which has been in place since 2010, now saves the average car driver £130 a year¹¹ compared with what they would have been paying had the duty escalator been maintained.

Nevertheless, the RAC still supports increasing transparency around the impact of tax on forecourt prices. In February, Conservative MP Peter Aldous introduced the Vehicle Fuel (Publication of Tax Information) Bill, which was designed to force retailers to display the Treasury duty and VAT take on fuel pumps and receipts. Unfortunately, the progress of the bill through Parliament, which was supported by the RAC, was halted when the June general election was called.

While concern about the cost of fuel has risen over the past year, prices remain a long way below the highs witnessed in 2012, when the average cost of a litre of petrol was above 140p and diesel was 147p.

Looking back at the 2012 Report on Motoring, the sky-high pump prices of the time resulted in 66% of that year's respondents saying they would be forced to severely reduce their car usage if fuel costs continued to rise.

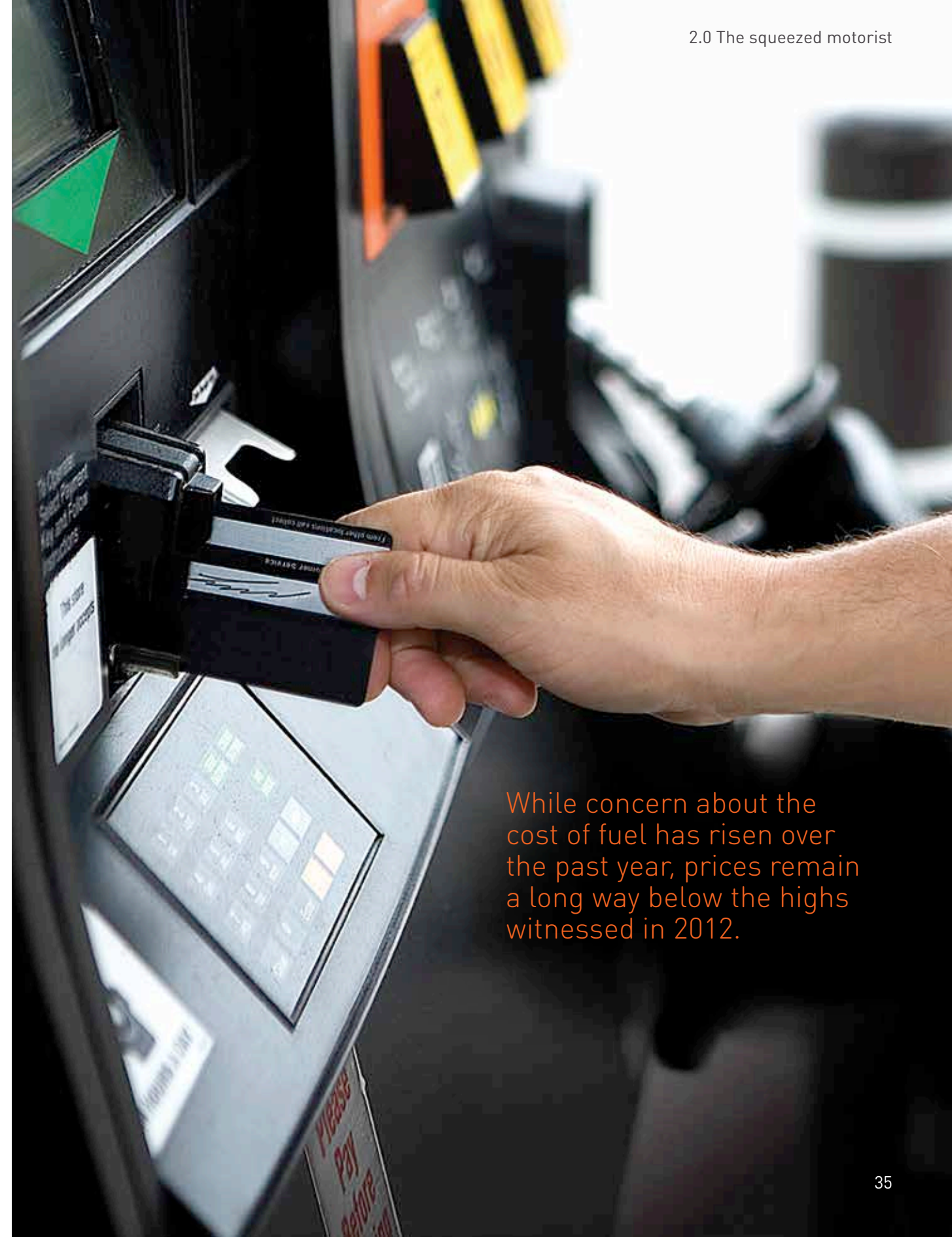
By way of contrast, only 24% of motorists this year say they have reduced their vehicle usage over the past 12 months – and the main reasons for doing so have been falling incomes and difficulties in parking.

£130 per annum

saved by the average car driver since the fuel duty freeze was put in place in 2010

24% 

of motorists this year say they have reduced their vehicle usage over the past 12 months



While concern about the cost of fuel has risen over the past year, prices remain a long way below the highs witnessed in 2012.

11. www.ukbudget.com/measures-autumnstatement-2016/fuel-duty.aspx

2.0 The squeezed motorist

2.2 Insurance premiums on the up

The cost of insuring a car is the most important concern for 8% of the motorists questioned this year – the same percentage as in 2016 – while the proportion of drivers who cite premiums as a top-four concern has risen from 26% to 28%.

There has been a continued significant rise, however, in the number of respondents who say the cost of insurance has gone up since 2016: 58% have experienced a rise in insurance premiums, against 46% who did so last year and 34% in 2015.

Industry figures indicate that premiums have indeed increased over the past 12 months: between May 2016 and May 2017, when this year's survey was carried out, the average price of a comprehensive policy increased by more than 15%¹², with a large proportion of this rise coming this spring. While insurance costs often move in cycles, the latest increases have largely occurred as a direct result of previous government decisions.

The first is a rise in insurance premium tax (IPT): this was upped from 6% to 9.5% in October 2015, and then to 10% 12 months later. The Government then decided at the end of last year that IPT would increase yet again in June 2017 to 12%, effectively doubling the rate in little over 18 months.

The other main cause of premium rises has been a change in the rules around compensation payments to motor accident victims suffering life-changing injuries to cover their loss of earnings and care costs, which was announced earlier this year. The UK uses a 'discount rate' – often referred to as the Ogden rate – to work out how much compensation victims are entitled to when they take payments as a lump sum rather than in monthly instalments.

58% 

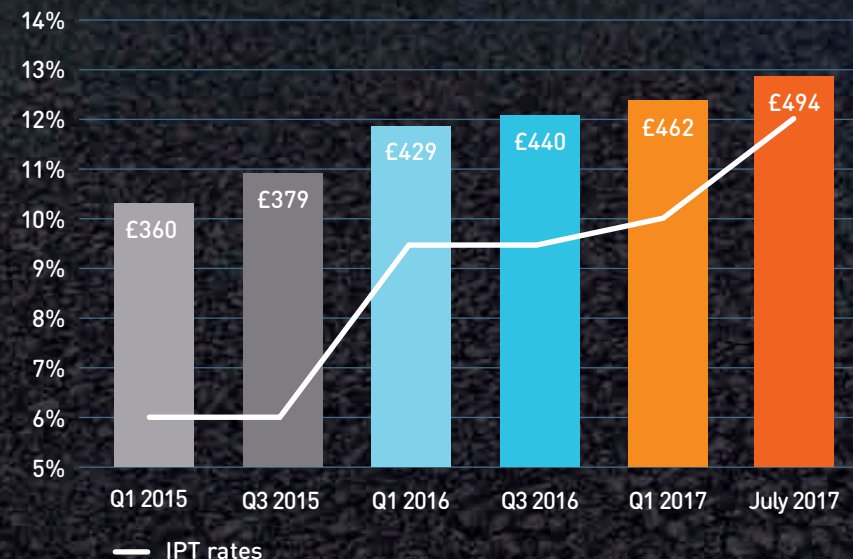
of motorists have experienced a rise in insurance premiums since 2016

15% 

average increase in the price of a comprehensive car insurance policy between May 2016 and May 2017



Average motor insurance premiums & insurance premium tax rates



Source:

www.abi.org.uk/news/industry-data-updates/2015/05/abi-average-motor-insurance-premium-tracker-q1-2015-data/
www.abi.org.uk/news/industry-data-updates/2015/10/abi-average-motor-insurance-premium-tracker-q3-2015-data/
www.abi.org.uk/news/industry-data-updates/2016/04/abi-average-motor-insurance-premium-tracker-q1-2016-data/
www.abi.org.uk/news/news-articles/2016/10/the-price-of-motor-insurance-shows-no-sign-of-reversing/
www.abi.org.uk/news/news-articles/2017/04/up-8-motorists-face-bumpy-ride-as-motor-insurance-premiums-continue-rise/
www.abi.org.uk/news/news-articles/2017/07/motor-premiums-rising-at-fastest-rate-ever/

12. www.consumerintelligence.com/press-releases/car-insurance-accelerates-as-compensation-rules-bite

2.0 The squeezed motorist

The discount rate is applied to allow for how much the value of an award would be expected to grow over time when invested and is based on returns on index-linked gilts.

In February 2017, the rate was adjusted for the first time in 16 years to avoid under-compensation as a result of low investment returns. The Lord Chancellor said it would change from 2.5% to minus 0.75%: which has meant insurers have had to make much higher lump-sum payments than before.

This has already resulted in premium increases of around 9% and further substantial rises are expected in the second half of 2017 as insurers begin to renew their 'reinsurance' policies which they have in place to protect themselves against particularly large losses. Analysts predict premiums could go up by around £75 a year¹³.

Following an outcry from the insurance industry, the Government published a consultation looking at the processes it uses to set the rate.

Ministers have also signalled their intention to press ahead with a crackdown on spurious whiplash-related personal injury claims, which are thought to have contributed significantly to premium increases in recent years.

In June's Queen's Speech, the Conservatives said they would introduce a Civil Liability Bill to regulate claims-management companies more strictly while also cutting legal costs by allowing more cases to be dealt with by the small claims court. The Government has suggested this could lead to savings on premiums of £35, but it is unclear if or how insurers will be compelled to pass these on.

£75 

the amount analysts predict premiums could go up by as insurers begin to renew their 'reinsurance' policies

£35 

possible saving on car insurance premiums as a result of crackdown on spurious whiplash personal injury claims

13. www.pwcblogs.com/press_room/2017/02/ogden-rate-change-pwc-comments-on-impacts-for-motor-insurance-pricing.html



"The news from the Queen's Speech that the Government is planning to tackle bogus whiplash claims is welcome. Frankly anything that helps damp the soaring cost of motor insurance is good news, particularly for young drivers who are being hit disproportionately by the hike in insurance premium tax."

STEVE GOODING
Director
RAC Foundation

2.0 The squeezed motorist

2.3 A reformed tax system

At the start of April this year, reforms of the VED system took effect: since then, all newly registered cars have faced a drastically different approach to emissions-based taxation.

While actual rates can vary significantly from vehicle to vehicle, the underlying approach is that new cars will face higher first-year VED bills – which will be based on CO₂ emissions – before the tax reverts to a standard annual rate of £140.

This year-two-and-beyond rate will be slightly lower (£130) for alternatively fuelled vehicles, such as plug-in hybrids, and zero for zero-emission vehicles. A separate supplement will also apply to new vehicles with a list price of over £40,000 between years two and six after the vehicle's registration.

While car tax itself has not been cited as a significant overall concern in this year's Report on Motoring, 38% of respondents say that their car tax has risen in the past 12 months against only 30% who said this last year. Given that the new VED system would have affected only a small fraction of the motoring population by the time this year's survey was conducted in May, it could be that the publicity surrounding the tax changes has created an impression of rising rates.

There have been no dramatic changes to motorists' views on the appropriateness or otherwise of current taxation levels. Nonetheless, there is a trend towards greater acceptance of motoring taxes: this year, just 26% of respondents disagreed that current tax levels are 'a fair price for the personal freedom driving gives us'. In 2015, 37% disagreed with the statement and in 2016, 29%.

Looking back five years to the 2012 Report on Motoring, 50% of drivers said tax levels at the time were not a 'fair price' to pay for such 'freedom' – although it is worth bearing in mind that fuel costs at the time were particularly high.

There has also been a steady decline in resistance to the idea of paying per mile to drive on certain roads, provided this is offset with lower motoring taxes elsewhere: this year, 37% of motorists were opposed to this idea, compared with 41% 12 months ago.

37%

of motorists were opposed to the idea of paying per mile to drive on certain roads

38%

of respondents say that their car tax has risen in the past 12 months

VED reforms from April 2017

Total amount of VED payable over two years from when vehicle was first registered. Each vehicle has a list price of under £40,000.



Nissan Leaf
(Electric)
0g CO₂/km

PRE 1 APRIL 2017
£0
POST 1 APRIL 2017
£0



Mitsubishi Outlander
3h petrol hybrid
auto 4WD
41g CO₂/km

PRE 1 APRIL 2017
£0
POST 1 APRIL 2017
£130



Ford Fiesta
1.5 TDCi Zetec
94g CO₂/km

PRE 1 APRIL 2017
£0
POST 1 APRIL 2017
£260



Vauxhall Astra
1.0T 12V
ecoFLEX Tech
Line 5 door
103g CO₂/km

PRE 1 APRIL 2017
£20
POST 1 APRIL 2017
£280



"The figures showing that motorists feel they are spending more on car tax are interesting – and it may be to do with the fact that, at the time this year's survey was carried out, there had just been a well-publicised increase in VED for a high proportion of new registrations. So most people haven't seen their own tax increase, but they are responding to this publicity."

PHIL RYAN
Group Operations Director
RAC

3.0

The dangers on our roads

For millions of Britons, the most significant motoring-related issue is the danger posed to them by reckless and irresponsible drivers. The 2017 Report on Motoring has identified an increase in levels of concern regarding illegal behaviours ranging from the use of handheld mobile phones, to drink and drug-driving, to speeding and failing to obey traffic signals. >



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3.0 The dangers on our roads

Drivers who use a handheld phone to talk, text or access the internet is the issue that was most commonly ranked as the number one concern this year. But overall, almost a third of the motorists we surveyed this year say their biggest concern relates to other drivers' behaviour and the impact this has on road safety.

The 2017 Report has found that a concerning proportion of motorists do not expect to be caught if they break motoring laws – although the 24% who agree with this sentiment is a drop on the 27% recorded last year. Meanwhile, a majority of drivers (62%) still feel there are not enough roads policing officers to enforce traffic laws effectively.

A large number of motorists say that they are worried about the potential distraction caused, both to themselves and other road users, by in-car technology such as dashboard internet access and touch-screen sound system controls.

There has also been an increase in the number of motorists who question how effective new technology is in enhancing road safety: while the overwhelming majority (83%) agree that cars are safer than in the past, only 53% think driver-assistance technology is making roads safer, down sharply from 63% in 2016, while only 38% think that roads are safer today than they used to be – considerably less than last year's 46%.

3.1 The mobile menace

The 2017 Report on Motoring has found 16% of British drivers feel that other motorists' use of handheld mobile phones – whether to make and receive phone calls, send or read text messages, or access the internet – is their single biggest concern, significantly higher than the 13% recorded 12 months ago, and the 9% in 2015.

This year, worries over handheld mobile use at the wheel overshadow discontent about the state of the UK's roads – last year's top concern – as well as growing disquiet about increases in fuel and insurance costs.

Overall, 40% of drivers said that handheld mobile phone use – and the distraction it inevitably causes – is one of their top four concerns, very similar to last year's 41%.

The Department for Transport has not conducted a handheld phone usage survey since the 2016 Report on Motoring was published so we do not have an independent assessment of current usage.

40% 

of drivers said that handheld mobile phone use is one of their top four concerns

24% 

of drivers do not expect to be caught if they break motoring laws



"Motorists are still using their phones while stopped in traffic or at lights, even though this is also illegal. One issue here is that drivers of cars with stop-start engines sometimes have the perception that they are not breaking the law by doing so because their engine is off."

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

3.0 The dangers on our roads

However, the dangers of using handheld phones at the wheel have featured prominently in the news over the last year, and the resulting increase in awareness of this issue may well have led to the heightened concern we are now seeing.

The main catalyst for media interest in drivers' phone use over the past year was the finding in the 2016 Report on Motoring that 31% of motorists admitted to having used a handheld phone to make or receive a call while driving in the previous 12 months, up from 8% in 2014.

This shocking statistic was seized upon by the media when the 2016 Report was published last September, and quickly led to national newspaper campaigns for tougher government action to deter phone use. The Government had already consulted on stiffer penalties but brought forward their plans and increased penalties more than was proposed in the consultation.

As a result, the law changed with effect from 1 March 2017, so that drivers in England, Scotland and Wales who are caught using a handheld phone automatically receive six points on their licence and are fined up to £200 – up from three points and £100 respectively.

The RAC subsequently launched the 'Be Phone Smart' campaign in March 2017 in a further attempt to encourage drivers to kick their handheld mobile phone habit (further details on page 87).

This year's Report has found that 23% of drivers admit to having used a handheld mobile at the wheel to make or take a call in the past 12 months – a fall of almost a third on the 2016 figure. However, this fall is largely among those who admitted to occasional use and worryingly, there remains a hard core of regular users who seem immune to warnings and deterrents.

Those who use their cars for their jobs are more likely to use handheld phones: 26% of business drivers say they either rarely or sometimes make calls in this way, compared with 18% overall.

Women are more likely than men to ignore incoming calls while driving: 57% of female motorists say this is their usual response to a call compared with 43% of men.

When it comes to using phones for other reasons, the trend is similar: in 2017, 82% of respondents say they never check texts, email or social media while driving, up from 73% in 2016, while 89% never take photos or videos compared with 85% last year.

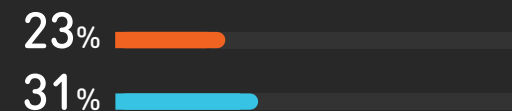
23% 

of motorists admitted to having used a handheld phone to make or receive a call while driving in the previous 12 months

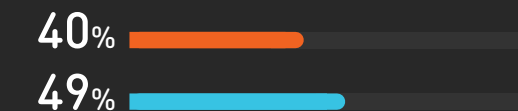
Percentage of drivers that make or receive calls (without hands-free)

● 2016 ● 2017

While driving



While stationary with engine on



3.0 The dangers on our roads

While motorists are more likely to use their phones when their cars are stationary with the engine on – for example while waiting at traffic signals or in traffic jams – compliance with the law in this area is improving as well. For example, 60% say they would never make or receive a call while stationary compared with 51% last year. And 62% say they wouldn't check texts or emails while sitting in traffic, up from 54%.

There are clear signs that the Government's tougher stance on handheld phone use has had some impact: this year's Report has found a high level of awareness about the increase in penalties which was announced last autumn and introduced in March. Only 11% of motorists claim to be unaware that the law has changed, and of the 89% who are aware, 28% say they have modified their own behaviour as a result.

Although these compliance figures are moving in the right direction, it remains clear that a minority of motorists do not recognise – or do not care about – the danger that their own handheld mobile use causes.

Interestingly, 10% of habitual handheld phone users say they make and receive calls while driving because they believe they can 'get away with it' – a proportion that has increased sharply since 2016 (7%). And astonishingly, 9% of this group say they didn't realise the practice was against the law.

More generally, there has been a fall in the number of drivers who think they can get away with breaking traffic laws: this year, 24% say they are unlikely to get caught if they break most motoring laws, down from 27% in 2016. However, 30% of drivers in London and 32% of business drivers feel they could, if they wished, break such laws with impunity.

Finally, mobile phones are not the only in-car distraction that concern drivers this year: 80% of motorists, for example, consider that the ability to access the internet or email via their car's dashboard would be dangerously distracting, while 43% are similarly concerned about touchscreen sound system controls.

Meanwhile, the heads-up displays (HUDs) incorporated into an increasing number of the latest vehicles are also seen as potentially distracting by 37% of motorists, despite the fact that such systems are designed to be unobtrusive and to help drivers keep their eyes on the road ahead by providing essential information that they would otherwise have to look down at their dashboard to see.

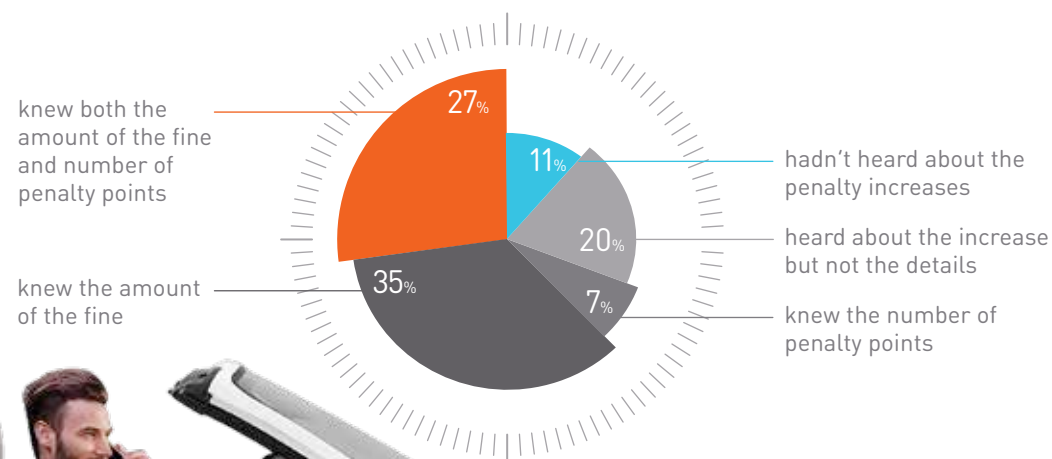
3.2 Drink and drug-driving

Drink-driving remains a concern and its position is unchanged in the overall ranking of motorists' concerns. There has, however, been a small increase in the associated percentages with 7% of motorists citing this as their number-

one concern this year, up from 5% in 2016. Overall, 24% say this is a top-four concern compared with 22% 12 months ago.

After the proportion of motorists who admit to driving while above the legal alcohol limit rose in 2016, it has fallen back this year: 16% of motorists reported believing they have been guilty of drink-driving over the past 12 months, compared with 20% in 2016. While the fall should be welcomed, these figures nonetheless suggest that around five million motorists believe they have driven while over the limit at least once in the past year, a quite shocking figure. It is also worth noting that, going back five years, only 11% of motorists admitted to drink-driving in research for the 2012 Report on Motoring. However, in recent years, awareness has been raised of the dangers of driving 'the morning after' and it is possible that the increase since 2012 may be attributable to this awareness rather than a behavioural change.

Awareness of penalty increases for using a mobile phone while driving



"There seems to be some confusion over what a heads-up display actually does. Some people think that it is going to provide news updates and so on – which would indeed be distracting – rather than just provide easier access to standard dashboard information."

SARAH SILLARS
Chief Executive
IAM RoadSmart

3.0 The dangers on our roads

The latest Report has again found that men are more likely to drink-drive than women, while Londoners have a greater tendency to drive while over the limit: in the capital, only 74% say they don't think they have been guilty of this, compared with 84% in the general population and 89% of those who live in rural areas.

More respondents admit to driving when over the limit the morning after a heavy drinking session (10%) than shortly after drinking (8%) and this figure rises to 14% for those aged under 45.

There remains general public support for a UK-wide reduction in the legal blood-alcohol limit: outside Scotland, the limit is 80 milligrams of alcohol per 100 millilitres of blood and 59% of British motorists think this should be cut to 50 milligrams (the current Scottish limit) or even 20 milligrams.

Northern Ireland is due to introduce a lower limit in 2018, but regrettably, at present it appears that the UK Government is not actively considering a change in the law.

A number of past Reports over the last 20 years have also indicated majority support for a cut in the drink-drive limit. In the 1997 Report on Motoring, 51% of drivers said they agreed that the limit should be reduced by about half while in the 2007 Report, 69% supported a cut to 50 milligrams per 100 millilitres of blood.

10% 

of drivers admit to driving when over the limit the morning after a heavy drinking session



“There is still a widespread lack of understanding about the impact of alcohol on the body and, in particular, how long it stays in the blood. Far too many people think that, if they have managed a few hours' sleep after drinking, they will somehow automatically be under the limit the next morning.”

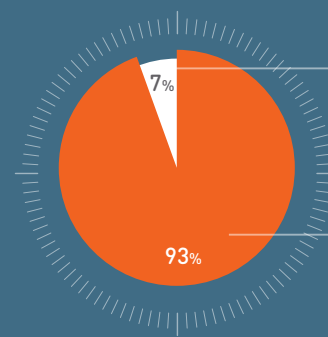
SUZETTE DAVENPORT

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

With official figures showing a rise in drink-drivers being involved in accidents in 2015¹⁴, respondents were asked this year for their views on the reason for the increase. The most common explanation is that 'people think they can get away with it' – 85% take this view – followed by 'a minority of drivers who habitually drink-drive and don't care' about the potential consequences (79% agree with this statement).

There has been little change in the percentage of those admitting to drug-driving in 2017: 6% say they have driven under the influence of drugs, down slightly from 7% in 2016. This includes around 3% of motorists who say they have driven after taking legal prescription drugs that could impair their ability at the wheel.

Driving under the influence



Think they have driven under the influence of:

- Illegal class A or B drugs (2%)
- Illegal class C drugs (3%)
- Legal prescription drugs (3%) (Includes 1% as passengers)

Think they have not driven under the influence of drugs



14. www.gov.uk/government/statistical-data-sets/ras51-reported-drinking-and-driving

3.0 The dangers on our roads

3.3 The need for speed?

Motorists are less likely to break the speed limit than a year ago, the 2017 Report on Motoring has found. Only 66% of drivers now say they frequently or occasionally disregard the 70mph motorway limit, down from 70% 12 months ago, while 39% exceed urban 30mph limits compared with 44% in 2016.

Motorists' propensity to break the motorway speed limit appears to have increased to a considerable degree over the past decade: according to the 2007 Report on Motoring, only 54% of drivers admitted to frequently or occasionally breaking the 70mph limit.

Compliance with 20mph limits in urban zones has also improved, with 41% this year admitting to speeding in these areas versus 46% in the last Report. In the past, we have seen a correlation between the tendency to speed and fuel prices. As petrol and diesel becomes more expensive,

some cost-conscious motorists respond by driving more efficiently at lower speeds. This seems an unlikely explanation this year as a substantial minority of motorists (38%) say they already drive in a fuel-efficient way, while only 16% say that a significant increase in fuel prices would compel them to do so. However, it may be more likely that increasing congestion is influencing speeding with fewer motorists having the opportunity to exceed the limit.

While 22% of drivers admit to frequently breaking the motorway speed limit, this proportion rises to 35% among business drivers. Overall, 62% of motorists think the motorway limit should be raised from 70mph to 80 mph or above. Interestingly, 70mph is the only speed limit for which there is majority support for an increase, but the percentage in favour of such an increase has been falling year-on-year. It was 65% last year.



There continues to be a significant dissatisfaction regarding 20mph areas, with 39% of drivers saying that the limit should be raised – only slightly down on 2016's 41%.

When 20mph limits were first introduced, they were typically confined to residential areas, near schools and in accident black spots. Motorists understood why they were there and there was a high degree of acceptance. However, as 20mph limits have been introduced more widely on busy through-routes and major A-roads, acceptance has generally declined in recent years because motorists no longer see the logic behind their introduction.

Although acceptance has increased slightly this year, it is clear that the 20mph policy has a long way to go before it is fully accepted – a goal that will perhaps be easier to reach if local authorities engage constructively with communities and road user representatives before imposing 20mph zones.

The RAC supports the introduction of 20mph limits wherever there is an overriding road-safety case, but the mobility and productivity needs of road users must also be taken into account.

Meanwhile, figures published in June 2017 by the Department for Transport¹⁵ show that general compliance with speed limits by car drivers in the UK improved between 2011 and 2016. Over this period, the proportion of drivers exceeding the motorway speed limit in free-flowing conditions fell from 49% to 46%, while those breaking the 30mph urban limit declined very slightly from 55% to 53%.

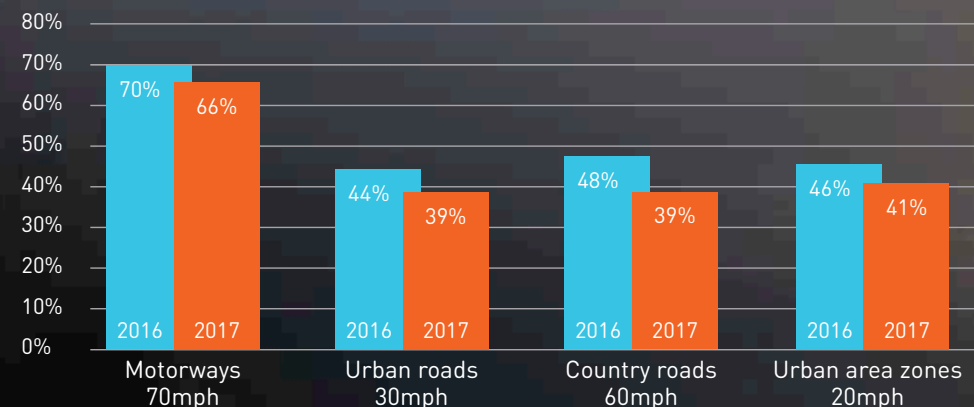
Compliance on national speed limit (60mph) single carriageway roads has remained constant, the DfT statistics show, with just 8% of motorists exceeding the limit in 2011 and 2016. But in 20mph zones, 81% of cars exceeded the limit in 2016 – although this figure only applied to routes where traffic-calming measures were not present.



“One of the reasons that motorists are less likely to say they exceed the speed limits this year could be because they cannot go any faster as a result of increasing congestion: the Department for Transport’s own figures show a rise in traffic volumes in 2016 and, as the Report points out, congestion and slower journey times have become greater concerns this year.”

DAVID LEIBLING
Transport and Motoring Consultant

Percentage of drivers who frequently or occasionally speed



15. www.gov.uk/government/uploads/system/uploads/attachment_data/file/623261/vehicle-speed-compliance-statistics-2016.pdf

3.0 The dangers on our roads

Motorists appear to be particularly polarised when it comes to how hazardous they feel motorway driving is. This year, drivers were asked to rank six road types – rural B roads, rural single-carriageway A roads, urban B roads, urban A roads, high-speed dual carriageways and motorways – in terms of which are the most dangerous to use.

While 36% of respondents said that motorways were the least dangerous roads, 25% of drivers ranked them as the most dangerous.

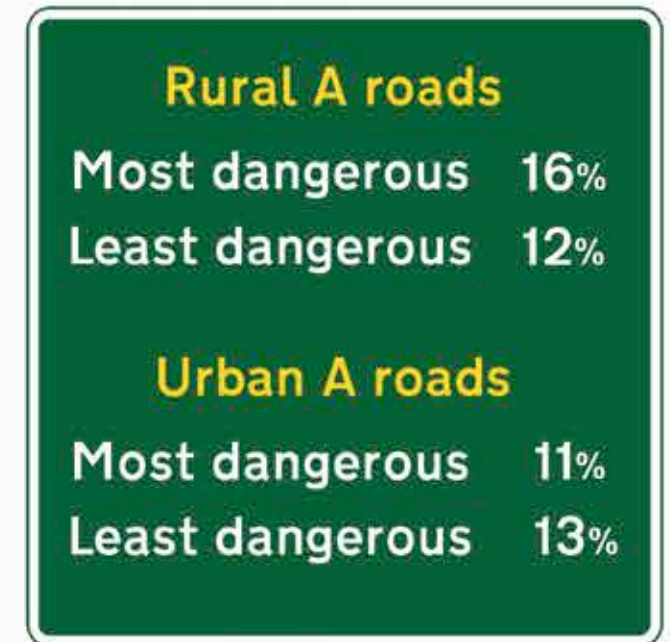
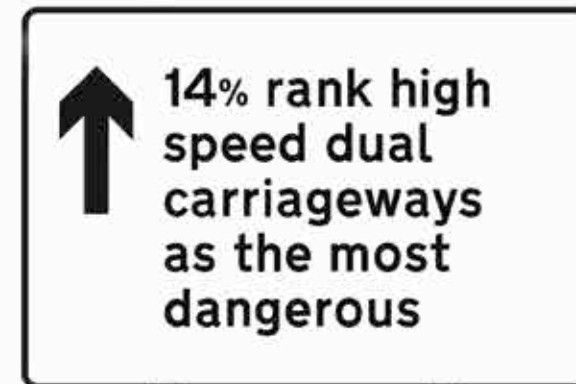
However, figures from the Department for Transport¹⁶ suggest that motorways are in fact the safest type of road in the UK: in 2015, there were 140,000 accidents where casualties were reported on Britain's roads, but just 4% of these occurred on a motorway even though motorways represent only 1% of roads in Great Britain but carry 21% of the traffic¹⁷.



"I was surprised to see that quite a high proportion of motorists felt that motorways were either the most or the least dangerous roads to drive on. I suspect drivers are actually answering the question, 'which type of road do I feel most comfortable on?'. Our statistics show that, in fact, motorways are very safe in terms of road accidents."

STEPHEN REYNOLDS
Head of Road Safety Statistics
Department for Transport

Perceived dangers of road types



16. www.gov.uk/government/uploads/system/uploads/attachment_data/file/533293/rrecgb-main-results-2015.pdf
17. www.licencebureau.co.uk/wp-content/uploads/road-use-statistics.pdf

4.0

The state of our roads

The condition and maintenance of Britain's local roads is no longer motorists' top concern, the 2017 Report on Motoring has found, having been overtaken by handheld mobile phone use at the wheel. This year, 10% of drivers say that the state of local roads is the most important issue, down from 14% 12 months ago. >



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4.0 The state of our roads

Nevertheless, fewer respondents think that the roads in their area have improved in the past year. And while potholes and deteriorating road surfaces remain the biggest complaint, there are significantly increasing worries related to the likes of street lighting and safety barriers. As in 2016, there is considerably less concern about the condition of motorways and dual carriageways.

With UK traffic volumes at record levels in 2016¹⁸, it is unsurprising that concern about congestion and slower journey times has increased – particularly in relation to motorways and dual carriageways. At the same time, there are signs that motorists' resistance to the idea of paying per mile to drive on certain roads is falling.

4.1 Potholes and local roads

In 2016, 14% of drivers said that the poor condition and inadequate maintenance of the roads in their area was their top concern: this year, the proportion has fallen to 10%. Overall, 33% of respondents have named this as a top-four concern, down from 38% 12 months ago.

While this might suggest that the state of the UK's local roads has improved, the more detailed questions in this year's Report indicate that drivers do not necessarily believe this is the case:

in 2017, 51% of motorists think local road conditions have worsened in the past year, the same proportion as in 2016. At present, only 7% say conditions have improved – down from 9% last year.

However, the poor state of local roads is not a recent concern. A decade ago, a far greater proportion of drivers thought that road surfaces were deteriorating than this year. In the 2007 Report on Motoring, 72% of respondents agreed with the statement, 'The quality of roads is getting noticeably worse these days'.

It is worth bearing in mind that the major concerns listed in the 2017 Report on Motoring illustrate relative levels of importance: so it may be, for example, that a sharp rise in worries about handheld mobile phone use or increasing fuel costs has displaced discontent about local roads.

In past Reports, motorists' concern about roads has primarily related to crumbling surfaces and potholes. However, when asked why they feel the condition of local roads has worsened in the last 12 months, fewer respondents in 2017 cite potholes (92% against 97% in 2016) – although they are clearly still the main grounds for complaint.

This year, 16% have pointed to problems with street lighting, up from 12% in 2016, while 5% say safety barriers are a worry (versus 2% in 2016).

The latest independent research from the Asphalt Industry Alliance (AIA) suggests that Britain still faces a significant backlog in terms of road repairs and maintenance: the organisation's Annual Local Authority Road Maintenance (ALARM) Report¹⁹, published in March 2017, found that around 17% of local roads are in 'poor structural condition', with less than five years of life remaining.

However, the AIA study did find evidence that underfunded local councils were 'doing more with less', and managing to address road-surface issues more efficiently and effectively despite falling budgets.

The RAC's own Pothole Index has shown a fall in the number of pothole-related breakdowns over the past 12 months.

However, the weather over the last 12 months has been less extreme with fewer days of frost and lower rainfall than in recent years. Therefore, it may be that improved road surface quality is a consequence of less damage caused by inclement weather rather than an increase in preventative

maintenance. Of course, if this is the case, it will only take a further period of extreme weather for road surfaces to deteriorate again and for motorists' concerns to rise.

Whatever the true picture, it is clear that local road maintenance throughout Britain continues to suffer from chronic underfunding. Given the importance of local roads to the economy, this issue needs to be urgently addressed by the Government to ensure that ring-fenced funding is made available to local authorities in the same way that the Roads Fund will provide ring-fenced funding for the strategic network.

The Government decision to make money from the National Roads Fund, to be created by hypothecating VED revenues, available for local roads that form part of the Major Roads Network²⁰ is welcome, though it remains to be seen whether the fund will be sufficient to finance this alongside the schemes in the RIS2 pipeline. However, much more needs to be done to stop local roads being the weak link in the nation's transport infrastructure.



"The decline in overall concern about potholes and the state of local roads could simply be a result of motorists becoming accustomed or resigned to road surfaces being in poor repair. This has certainly been an issue for some time now."

DAVID BIZLEY
 Chief Engineer
 RAC

18. www.gov.uk/government/statistics/road-traffic-estimates-in-great-britain-2016

19. www.asphaltuk.org/press_releases/aia-launches-its-annual-local-authority-road-maintenance-alarm-survey-into-local-road-conditions-and-funding-today-28-march-2017/

20. A Major Road Network for England, David Quarmby and Phil Carey, Rees Jeffreys Road Fund, October 2016, and A Major Road Network for England – Report Summary, David Quarmby and Phil Carey, Rees Jeffreys Road Fund, October 2016 – both available at www.futureroadsengland.org where the 10 Supporting Documents can also be accessed, and at www.reesjeffreys.co.uk/transport-reports.

4.0 The state of our roads

Policymakers should also note that the 2017 Report on Motoring shows that 47% of drivers (up from 45% in 2016) would be willing to pay extra motoring tax if the money raised was ring-fenced to improve roads. However, almost eight in 10 motorists (79%) say that the taxes they already pay are not sufficiently reinvested into the upkeep of local roads.

It is worth noting, however, that concern over the condition and maintenance of roads is now higher than five years ago: in the 2012 Report on Motoring only 8% of respondents said that it was their top concern, compared to 10% in 2017.

As was the case in 2016, just 12% of drivers this year say that the condition of major roads and motorways is one of their top four concerns. Less than a third (29%) say these roads have deteriorated in the past 12 months (28% in 2016). Among this 29%, there has been an increase in the proportion that blame poor carriageway lighting (up to 20% from 15%) and inadequate signage (up to 15% from 11%). This raises questions for local authorities and Highways England about how appropriate it is to switch off some lighting overnight to save money.



How many respondents listed the condition and maintenance of local roads as one of their top four concerns

Year	Percentage
2015	30%
2016	38%
2017	33%



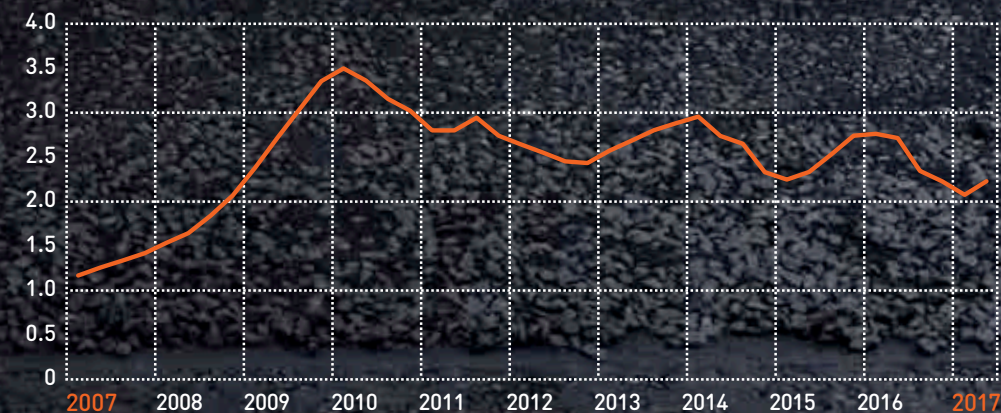
"I think it is significant that in areas such as London, where a form of charging for road use already exists, support for the charging is higher than average."

It suggests that, when people have some experience of this kind of policy, they are more likely to support it being applied more widely. There is a parallel in Scotland where they already have a drink-drive limit of 50mg/100ml, and a higher proportion would like to see this applied across the UK than from outside England, Wales and Northern Ireland."

DAVID DAVIES
Executive Director
Parliamentary Advisory Council for Transport Safety

RAC Pothole Index

The RAC has used its database of over two million breakdowns attended each year to develop the RAC Pothole Index as an ongoing monitor of the state of the UK's roads. The index 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.



4.0 The state of our roads

4.2 Tackling congestion

Figures from the Department for Transport (DfT)²¹ suggest that the volume of traffic on the UK's roads increased by about 2.2% in 2016, continuing the upward trend seen since 2012. It is unsurprising, then, that the level of concern among motorists about congestion and longer journey times appears to have remained high: this year, 8% say this is their biggest concern, up from 7% 12 months ago. The issue is even more pressing among those who drive for work: 11% of business drivers say this is their number-one concern.

Meanwhile, more than a quarter of all drivers (26%) say congestion is a top-four concern, down fractionally from 27% in 2016, though this change is not statistically significant.

The 2017 Report on Motoring shows that motorways are the routes where congestion is thought to have increased the most: 61% of drivers say motorway congestion levels have risen in the past 12 months, with 27% saying the change has been considerable.

A majority of drivers think that congestion has increased on high-speed dual carriageways (57% take this view), urban A roads (58%) and other urban routes (55%).

While more motorists in 2017 say they have seen motorway congestion increase recently, concerns highlighted in the 1998 Report on Motoring suggested that urban traffic was a bigger issue at the time: just 58% of drivers said that congestion on motorways and other major routes was a 'major problem' compared with 77% who thought congestion in towns and cities was a serious concern.

It is however unclear whether the reduction in concern about urban congestion over the last 20 years is as a result of better traffic management by local authorities or simply that drivers have become accustomed to congestion and have adapted their driving habits accordingly.

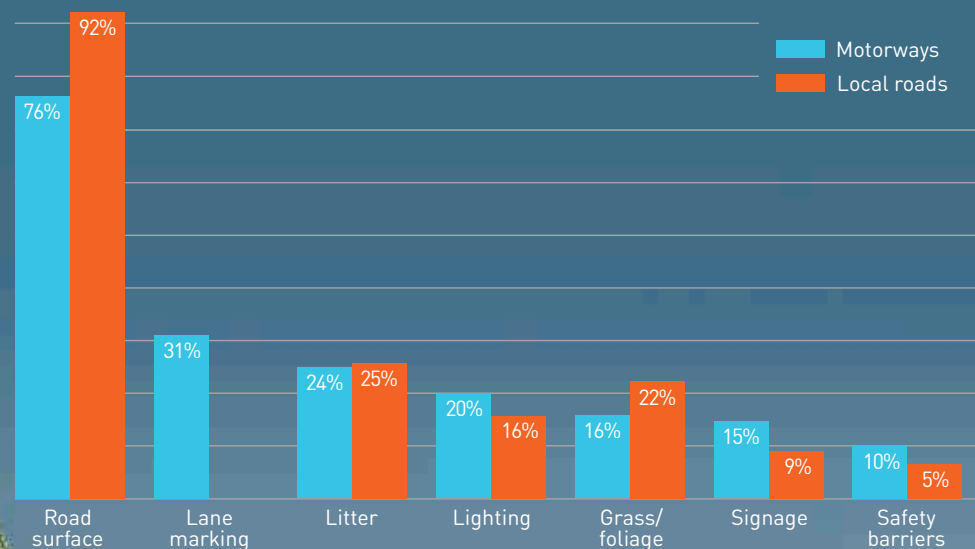
61% 

of drivers say motorway congestion levels have risen in the past 12 months

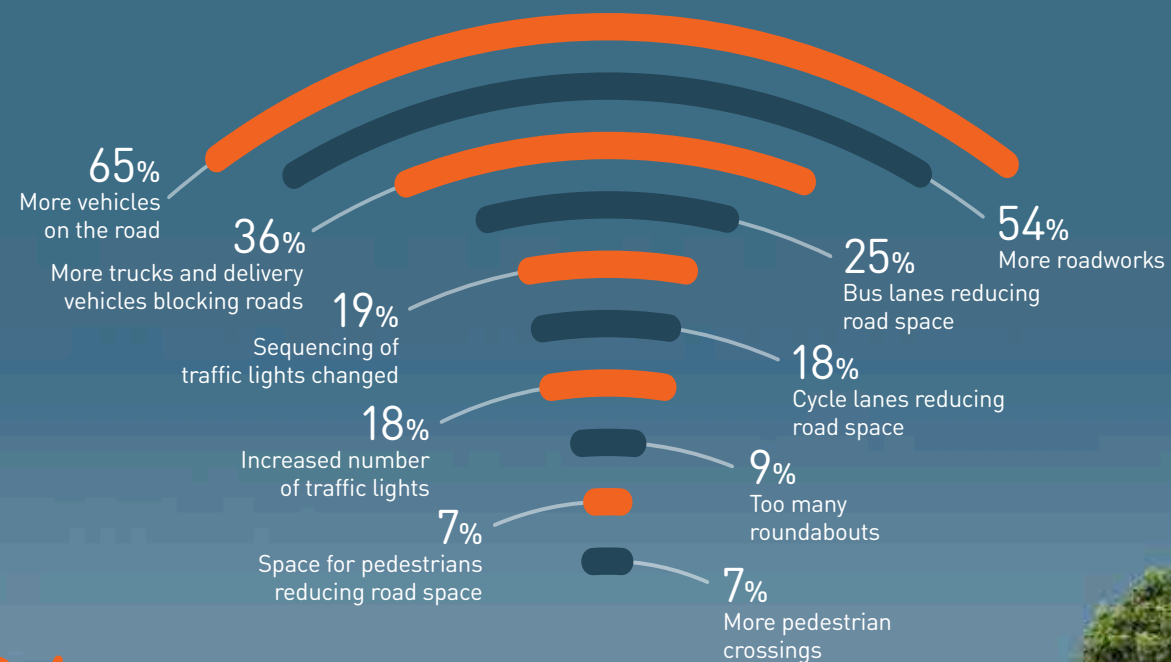
21. www.gov.uk/government/uploads/system/uploads/attachment_data/file/611304/annual-road-traffic-estimates-2016.pdf

4.0 The state of our roads

Condition of roads: what's got worse?



Reasons motorists think congestion levels have increased in towns and cities in the last 12 months



26%

of drivers say congestion is a top-four concern



4.0 The state of our roads

This year's Report also looked at the reasons given by drivers for why they believe congestion has risen. While a general increase in traffic volumes is largely blamed for increasing urban congestion, major roadworks (cited by 47% of respondents), middle-lane hogging (45%) and lorries overtaking other heavy goods vehicles (40%) are the main complaints on motorways.

Of the 61% of drivers who have seen motorway congestion worsen, almost half (48%) think that rules should be introduced to stop lorries overtaking other lorries.

Among urban drivers, there is some discontent over the perceived encroachment of bus and cycle lanes into space that was previously available for all road users. Almost a third (29%) think that bus lanes are most responsible for congestion in towns and cities, while 16% blame cycle lanes.

Of the former group, two-thirds (68%) think other vehicles should be allowed to use bus lanes at certain times – although, of course, such policies are already applied in some cases.

And more than half (54%) of the motorists who say cycle lanes are the main cause of congestion think that cyclists should be compelled to use such lanes where they are available.

Generally speaking, motorists are ambivalent about whether toll roads should be introduced in order to tackle issues such as congestion and air pollution: 38% of drivers say they support the introduction of more toll roads as an alternative to the current level of motoring tax – no significant difference from last year's 37%. The same proportion (38%) are against this idea – although this is less than the 41% recorded 12 months ago.

The majority of motorists (55%) say they use their cars as frequently in 2017 as last year, while there has been little change in the proportions of respondents who say they now drive either more or less often.

Of the 24% of drivers who use their cars a little or a lot less, falling income and the availability of parking are the most common explanations given – both are cited by 23% of this group as a reason for driving less. But working from home (20%), online non-grocery shopping (18%) and online grocery shopping with home delivery (15%) are other common factors in reductions in vehicle use.

Parking is not covered in any depth by this year's Report but both the cost and availability are cited as top-four concerns by 17% and 13% of

respondents respectively. Research conducted earlier this year using the RAC panel²² showed that there was genuine concern among motorists regarding the behaviour of some private parking operators, and the RAC is of the view that this sector needs to be regulated by government so that motorists benefit from minimum standards of conduct and fairer treatment.

Most drivers (55% versus 54% in 2016) say they would use their cars less if public transport were better, while 20% disagree – down from 24% in 2016.

Among this 55%, the main reasons they do not use public transport are that fares are too high (cited by 45% of respondents), they do not have close enough access (40%) or that it does not run frequently enough (also 40%).

29% 

think that bus lanes are most responsible for congestion in towns and cities



"The online story as regards why some drivers are using their car less might offer a glimpse into the future – the Report suggests that, as people rely on the internet for shopping and even working remotely, they may start to drive less. I would be very interested to see how this trend evolves over time."

STEPHEN JOSEPH
Chief Executive
Campaign for Better Transport

22. www.rac.co.uk/press-centre#/pressreleases/motorists-want-to-see-better-government-regulation-of-private-parking-1868752



5.0

Air quality and the environment

The environmental impact of motoring has been regularly featured in the media over the past 12 months. The impact on air quality of nitrogen dioxide emissions from diesel engines has been particularly controversial, and this topic has been made more newsworthy by the fact that last November, the Government was forced by the High Court to revise and strengthen its air quality strategy²³. >

23. www.theguardian.com/environment/2016/nov/02/high-court-rules-uk-government-plans-to-tackle-air-pollution-are-illegal



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Air quality concerns >>



Page 72

Local air quality >>



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Choice of next vehicle >>

5.0 Air quality and the environment

While the 2017 Report on Motoring does reveal greater awareness of environmental issues among drivers, levels of general concern in this area appear still to be relatively low in the pecking order: just 9% of motorists name the environmental impact of motoring as one of their top four concerns this year, a slight increase from 7% in 2016.

Concern about local air quality is more widespread with around a third of respondents (32%) expressing concern, down slightly from 2016, although there appears to be growing support for imposition of penalties on the most polluting vehicles.

There is little agreement over where blame lies for worsening air quality: only 36% hold diesel vehicles primarily responsible. Most people do not support blanket charges or penalties being applied to diesels irrespective of how old they are and therefore how much nitrogen dioxide they emit.

However, with local and national government policies to improve air quality increasingly targeting diesel vehicles, diesel owners are becoming more concerned about the resale values of their cars, while motorists in general say they are far less likely to choose a diesel as their next car than in 2016.

Motorists' views on environmental issues and air quality



9%

of motorists name the environmental impact of motoring as one of their top four concerns

36%

of drivers hold diesel vehicles primarily responsible for worsening air quality

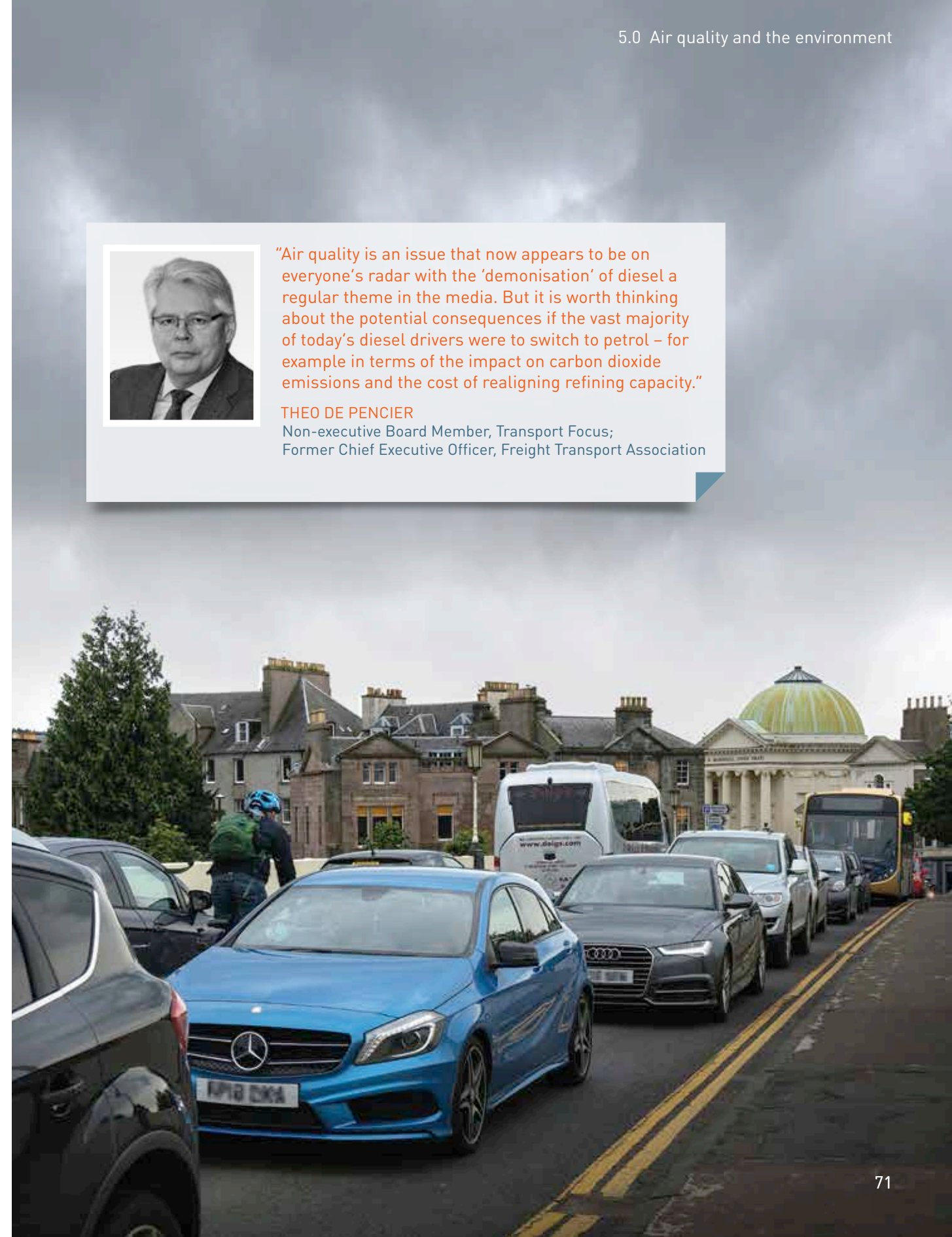
59%

of drivers support the introduction of charges for more polluting vehicles entering areas with the poorest air quality



"Air quality is an issue that now appears to be on everyone's radar with the 'demonisation' of diesel a regular theme in the media. But it is worth thinking about the potential consequences if the vast majority of today's diesel drivers were to switch to petrol – for example in terms of the impact on carbon dioxide emissions and the cost of realigning refining capacity."

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



5.0 Air quality and the environment

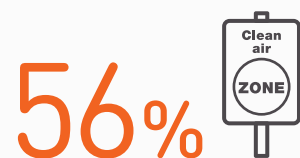
5.1 Local air quality

Just under a third (32%) of all motorists say they have concerns about air quality near where they live, a slight fall from the 34% recorded in 2016. Unsurprisingly, concern is highest in urban areas: among those who live in London, for example, the proportion is 52%.

In terms of overall concerns, 7% of motorists say that the impact of diesel vehicles on health is a top-four concern, up slightly from 6% in 2016, though the increase may not be statistically significant.

There is greater awareness of the Government's plans to establish clean air zones in areas where current or projected levels of pollution exceed safe standards: this year, 56% of

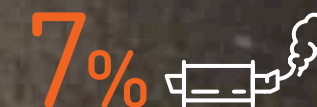
motorists say they have heard about these proposals, up from 42% 12 months ago. This is not surprising given the media publicity regarding the Government's revised Air Quality Plan around the time the research for this year's Report was conducted.



of motorists say they have heard about the Government's proposals to establish clean air zones in areas where current or projected levels of pollution exceed safe standards



of all motorists say they have concerns about air quality near where they live, a slight fall from the 34% recorded in 2016



of motorists say that the impact of diesel vehicles on health is a top-four concern

5.0 Air quality and the environment

Support for stronger action to be taken to reduce pollution from vehicles in areas with the poorest air quality has risen slightly from 66% to 68%. It is clear, however, that the motoring public would prefer to see any penalties or charges explicitly linked to how much a vehicle is contributing to the problem.

For example, 57% say they agree with the introduction of charges in certain areas for diesel vehicles that do not comply with the latest emissions standards (no change from 2016), while the same proportion support banning more polluting vehicles from areas where air quality is poorest.

But only 42% say they agree with the introduction of charges for all diesel vehicles – regardless of emissions levels – that enter such areas. At the same time, only 36% of drivers agree that diesel vehicles are the main source of local air pollution in urban areas, while 24% disagree and 29% are unsure. In reality, according to government estimates²⁴, motor vehicles on average contribute around 65% of the nitrogen dioxide (60% in London) emitted in the areas of poorest air quality. And, while the majority of roadside emissions are generated by diesel vehicles, diesel cars contribute only around a third of this (a quarter in London).

Finally, a majority of motorists (53%) agree with the assertion that the Government is unfairly targeting diesel car drivers as a key source of air pollution with only 18% disagreeing.

Overall, these findings suggest that any local or national government plans that appear to demonise all diesel cars – rather than focus on tackling older, more polluting vehicles – are likely to meet with public disapproval.

The 2017 Report on Motoring also looked at differences in attitudes to air quality issues based on the type of car driven: it is not surprising that the proportion of diesel owners who think that diesel cars are the main source of pollution is lower (23%) than across the whole motoring population (36%).

But among diesel drivers, there is nonetheless widespread support – running at 62% – for stronger action against the most polluting vehicles.

Almost half (46%) of private diesel car owners are concerned about the resale value of their vehicles given the potential for future restrictions on diesel vehicles.



46% 

of private diesel car owners are concerned about the resale value of their vehicles

57% 

of motorists say they agree with the introduction of charges in certain areas for diesel vehicles that do not comply with the latest emissions standards

24. https://consult.defra.gov.uk/airquality/air-quality-plan-for-tackling-nitrogen-dioxide/supporting_documents/Draft%20Revised%20AQ%20Plan.pdf

5.0 Air quality and the environment

5.2 Choice of next vehicle

Environmental concerns seem to play a significant role when it comes to motorists' choice of their next car. In 2017, only 16% of respondents say they are most likely to buy a vehicle with a diesel engine the next time they make a purchase, a sharp fall on the 28% recorded in 2016. It is clear that both existing and proposed national and local policies to target diesels with charges, penalties and possibly restrictions are having a serious impact on planned buying behaviour.

By way of comparison, the 1997 Report on Motoring found that 42% of drivers were 'certain or likely' to buy a diesel as their next car.

64% 

of motorists say that environmental and emissions credentials are an important factor in their choice of next vehicle

This year 58% say their next car is likely to have a petrol engine – up from 51% 12 months ago – while there has been little change in the proportion of motorists planning to buy vehicles with more environmentally friendly motors. This year, 15% of drivers say their next car is likely to be a conventional hybrid – compared with 14% in 2015 – while there has been no change in plans to buy plug-in hybrids/extended range electric vehicles (5%) or pure electric battery-powered vehicles (2%). As hydrogen fuel cell vehicles have come on to the market, this was included as an option in the 2017 Report on Motoring research, and 1% of respondents said they would choose one as their next vehicle. Taking this into account, the percentage saying they will select a zero emissions vehicle has increased from 2% to 3%.

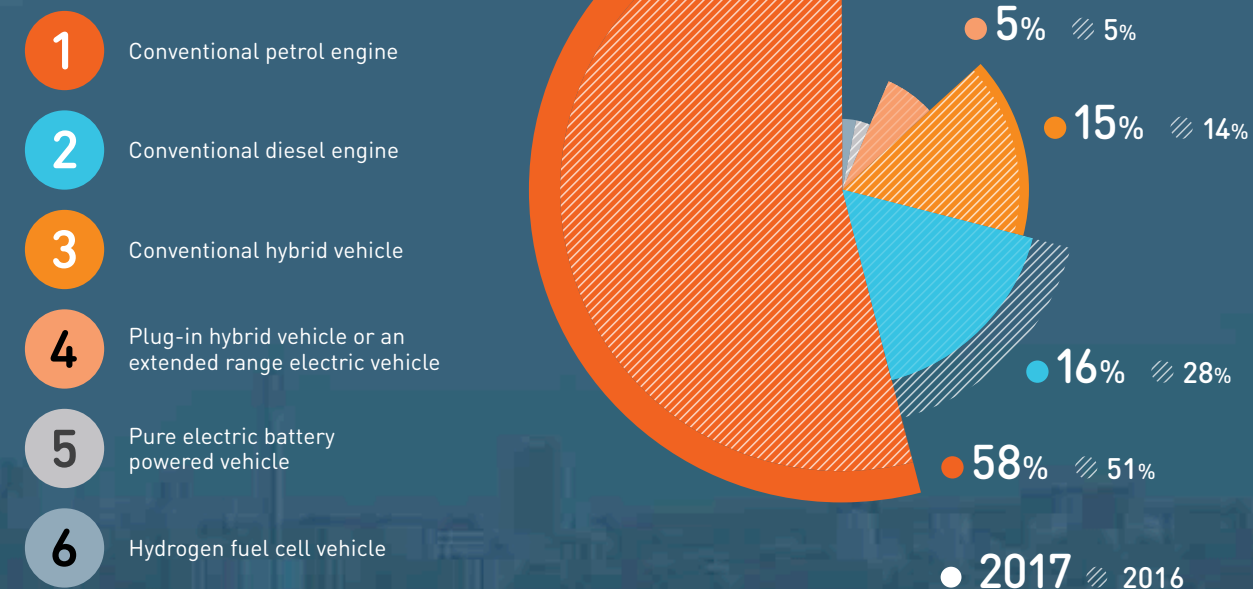
And almost two-thirds (64%) of motorists say that environmental and emissions credentials are an important factor in their choice of next vehicle.



"One of the reasons for the increase in market share for petrol-engine cars is that manufacturers' offering has become much broader, which has led to the structural changes in the market: there is more choice in mini and super-mini vehicles, which tend to be petrol-powered, and more plug-in hybrids that are usually petrol engines combined with electric motors. Diesel is still largely the preserve of larger vehicles."

MIKE HAWES
Chief Executive
Society of Motor Manufacturers and Traders

Which type of vehicle are motorists most likely to buy?



5.0 Air quality and the environment

Men are more likely than women to choose diesel over petrol, while business drivers are considerably more likely to choose diesel or alternatively fuelled vehicles over petrol cars, most probably for reasons of fuel efficiency.

Figures from the Society of Motor Manufacturers and Traders (SMMT)²⁵ show that in terms of new car registrations, there has been a relative decline in diesel purchases so far in 2017: by May, diesel sales were down 8.8% on the same period in 2016, while petrol sales were up 5.8%.

7% 

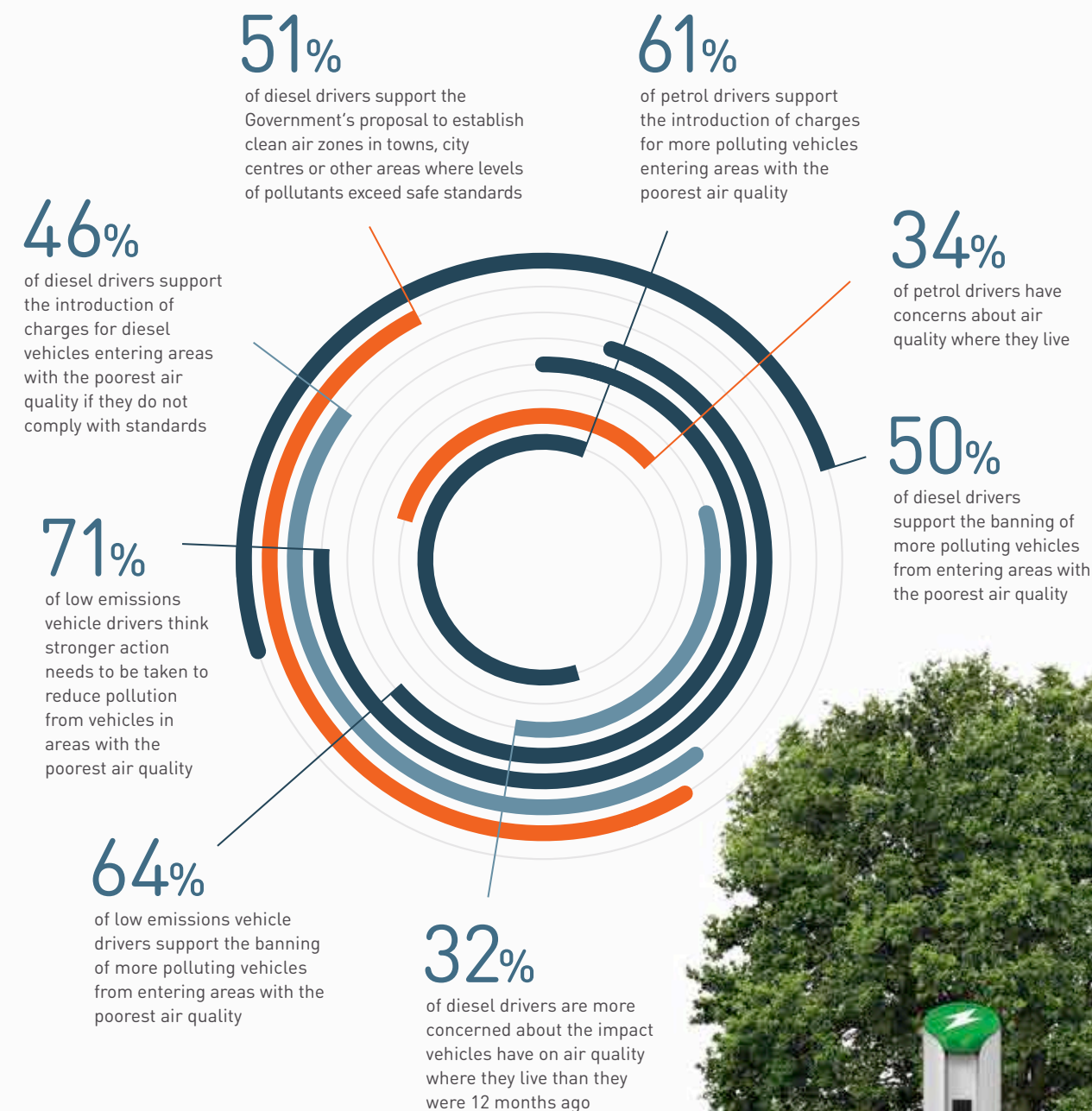
of motorists named concern regarding carmakers' emissions or fuel-efficiency claims as a top-four concern

It should be borne in mind that the Report on Motoring's planned purchase statistics outlined above cover both new and used vehicles, unlike the SMMT figures.

The image of diesel cars has been hit by local and national government policies on air quality and may also have taken a knock from the publicity associated with a world leading manufacturer attempting to cheat regulators' emissions tests.

While this year's figures do not suggest that the popularity of alternatively fuelled vehicles – those which do not run exclusively on petrol or diesel – has increased, SMMT research shows that such cars account for a growing proportion of the new car market: up to May 2017, this share has grown to 4.1% from 3.2% in the same period last year.

Motorists' views on the local environment



25. www.smmt.co.uk/2017/06/new-car-registrations-decline-may-ahead-general-election-2/

5.0 Air quality and the environment

The 2017 Report asked drivers which factors would be most influential in convincing them to purchase a pure electric vehicle: the most commonly cited were lower running costs (30%), lower initial costs (29%), extended battery range (27%) and greater availability of charging points (25%).

While the RAC welcomed the announcement in June's Queen's Speech that the Government plans to compel motorway service stations and larger fuel retailers to provide electric vehicle charging points, it is regrettable that more provision is not being demanded in the likes of shopping centres and supermarket car parks. These are more practical locations where the need to recharge is arguably greater and more convenient due to the length of stay.

We should also like to see the Government continue to push for a common standard for charging technology and roaming agreements so membership of one operator's charging network provides access to all to make it simpler and more efficient for users.

26% 

of motorists said the Government should abolish VED or introduce a more favourable vehicle tax system for all ultra-low emission vehicles

The Report found that motorists would be more likely to buy ultra-low or zero emission vehicles if the Government provided greater incentives to do so. While vehicle excise duty (VED) is still zero rated for pure zero emission vehicles costing less than £40,000, just over a quarter of respondents (26%) said ministers should abolish VED or introduce a more favourable vehicle tax system for all ultra-low emission vehicles.

While the Government retained the VED benefits for pure electric vehicles in the 2017 overhaul of rates, they largely removed the benefits for owners of other ultra-low emission vehicles such as plug-in hybrids after the first year of ownership. This is extremely short sighted as plug-in hybrids are able to operate on battery alone when driving through the most polluted areas and provide a genuine practical alternative to conventional petrol and hybrid vehicles for the average motorist with none of the restrictions of range and charging point availability that are inhibiting the take-up of pure electric vehicles. And it is very difficult to see how the UK can honour its obligations to reduce greenhouse gas emissions under the Paris Agreement without offering businesses and individual motorists greater incentives to choose ultra-low emission vehicles.



"One of the best ways for the Government to encourage the take-up of ultra-low emission vehicles is by offering more support for plug-in hybrids, for example by reversing some of the recent changes in VED which have removed some of the incentives to buy a plug-in hybrid. These vehicles would then start to feed into the second-hand market and we would see a lot more of these cars on the roads."

DAVID BIZLEY
Chief Engineer
RAC

6.0 RAC calls to action



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

Cost of motoring

Fuel duty: This year's Report shows the cost of motoring has returned to being one of the biggest concerns. In 2014, a Treasury report indicated that there was an inverse relationship between higher fuel duty and economic growth. The RAC therefore calls on the Government not to increase fuel duty for the life of this parliament to protect economic growth and avoid alienating motorists.

IPT: The increase in Insurance Premium Tax (IPT) from 6% in 2015 to 12% in June this year has significantly increased costs for all motorists, but especially those who pay the highest premiums, notably younger and older drivers.

The RAC calls on the Government to treat the current rate of 12% as a maximum and to introduce reduced IPT rates to incentivise and encourage safer driving – for example by setting a reduced rate for drivers who choose 'black box' telematics-based insurance.

Discount rate: Last year's change to the discount rate for life-changing personal injury compensation claims has already caused insurance premiums to rise. The RAC calls on the Government to introduce a new methodology for setting the rate that is fairer to all parties as a matter of urgency. The Government should also consider immediately setting a new rate which better reflects real world financial returns as an interim measure.

Whiplash claims: The Government is committed to reducing or eliminating spurious whiplash claims. The RAC calls on the Government to clarify how it will ensure that all of the estimated £35 savings on each motor insurance policy premium are passed on to motorists by insurers.

Have your say:
#ROM2017
 on Twitter

Road safety

Handheld mobile phones: While this year's Report clearly shows use of handheld mobile phones at the wheel has reduced among occasional users, more action is needed to break the habit among hard core 'addicts'. The RAC calls on the Government to use its influence to ensure that police enforcement campaigns continue as a priority and that motorists are reminded regularly of the dangers of handheld phone use while driving via hard-hitting THINK! communications campaigns.

Drink-driving: This year's Report reveals continued concern among motorists about drink-driving and support for a reduction in the drink-drive alcohol limit to at least the lower

level currently in place in Scotland and across much of Europe. The RAC calls on the Government to reduce the limit in England and Wales from 80mg/100ml to 50mg/100ml.

Road casualties: With a worrying increase in the number of people killed or seriously injured on Britain's roads in the year ending September 2016, the RAC joins PACTS and other road safety campaigners in calling on the Government to reintroduce casualty reduction targets and to establish a national road traffic accident investigation unit similar to those which already exist for other transport modes. The RAC also calls on the Government to take ownership and accelerate actions aimed at improving young driver safety which has lacked a sense of urgency over the last four years since the green paper on the issue was shelved.

6.0 RAC calls to action



State of the roads

Major road network: The RAC welcomes government recognition of the importance of other major roads which are not part of the strategic network but form part of the Major Roads Network. The RAC calls on the Government to pass any necessary legislation to ensure that the Roads Fund is created by ring-fencing VED revenue to fund maintenance and development of the Major Road Network. The RAC also calls on the Government to ensure that the necessary resources are in place to deliver the schemes included in RIS1 and in due course, RIS2 in order to ensure that the road infrastructure can support future economic and mobility needs and that the unwelcome trend towards increased congestion is reversed.

Local roads: The state of local roads remains one of motorists' top concerns. Local roads are an essential component of the national roads infrastructure

because virtually all journeys start and finish on them. The RAC calls on the Government to further recognise the importance of local roads by ring-fencing a further proportion of motoring tax receipts to tackle the maintenance backlog and fund local improvement schemes. Such action should mirror the Government's approach to funding development and maintenance of the strategic and major road networks.

Air quality and the environment

Air quality: Motorists recognise and accept that action needs to be taken to improve the air quality in urban areas. The RAC calls on those local authorities implementing Clean Air Zones to focus on the most polluting vehicles which cover the most miles – including buses, taxis, lorries and vans – and only to target cars as a last resort.

Have your say:
#ROM2017
 on Twitter

Any actions against cars need to be implemented in a way that is not punitive for owners of smaller, more modern diesel vehicles, many of whom were encouraged to buy these to minimise greenhouse gas emissions.

Tackling congestion: The RAC believes tackling congestion in our towns and cities should play a significant role in improving air quality. The RAC calls on local authorities to consider all possible measures – including better traffic light sequencing and changing traffic-calming speed humps to speed cushions and to improve urban traffic flow and average speeds. The RAC also calls on local authorities to introduce 'no idling zones' in areas where air quality is poor to stop people leaving engines running when stationary.

Ultra-low emission vehicles: The RAC calls on the Government to refine the vehicle excise duty bands and rates introduced in 2017 for new vehicles in order to better incentivise the take-up of all ultra-low emission vehicles and not just zero emissions options.

The RAC also calls on the Government to extend proposals announced in the Queen's Speech requiring more electric vehicle charging points to be installed at motorway service areas and large fuel retailers to include car parks at major shopping centres and supermarkets where they would be of benefit to more people.

Fair motoring

Parking operator practices: Motorists have serious concerns about the poor practices of some private parking companies. The RAC calls on the Government to bring forward proposals for legislation that would improve motorists' experience and confidence. These should include minimum standards of conduct for parking operators, a fair and effective appeals process, maximum penalties and minimum standards of conduct for recouping penalty charges to outlaw over-aggressive debt management.

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
#ROM2017 on Twitter

7.0 Our work for motorists

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

RAC Fuel Watch

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

RAC Fuel Watch

RAC Pothole Index

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

We use the findings from the RAC Pothole Index on a quarterly basis to highlight the scale of the problem as part of our campaign for better quality roads.

RAC Pothole Index

Be Phone Smart

Findings from the 2016 Report on Motoring, which revealed the use of handheld mobile phones while driving had reached epidemic proportions, helped lead to the penalty for the offence being doubled to a £200 fine and six penalty points. While this was clearly a step in the right direction the RAC wanted to do more to help break this deadly habit. This is why we launched Be Phone Smart – a campaign which encourages motorists to make a personal commitment not to use their handheld phone when at the wheel.

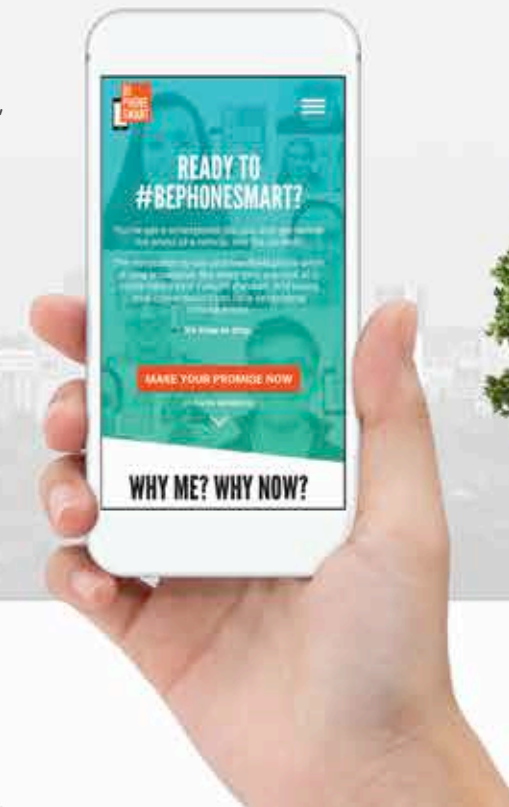
BePhoneSmart.uk has the backing of a wide range of organisations and initiatives including the National Police Chiefs' Council, the Government's THINK! campaign, IAM RoadSmart, the Road Haulage Association, Road Safety GB and Transport Scotland.



RAC Child Road Safety

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

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



8.0 Successes over the last 12 months

Safer roads



Increased penalties for the use of a handheld mobile phone: Findings from the 2016 Report on Motoring revealed mobile phone use was at epidemic proportions. This led two major national newspapers to campaign for tougher penalties, which persuaded the Government to bring forward the introduction of increased penalties of a £200 fine and six penalty points, both of which were stiffer than those on which the Government had previously consulted.

Drink-drive limits: With a majority of motorists wanting a lower limit, we actively supported proposals by the Northern Ireland Government on reducing the drink-drive limit to bring it in line with that of Scotland – 50mg/100ml. We continue to urge the UK Government to review the limit in England and Wales.

Safer motorways: We gave evidence to the Transport Select Committee and worked with Department for Transport (DfT) and Highways England to encourage better design of smart motorways where there is no hard shoulder. Work will continue on this through 2017.

Better roads



Improving local A-roads: With congestion and the conditions of local and national roads continuing to be a concern for motorists, the RAC contributed to and supported the recommendation of the Rees-Jeffreys report which called for the designation and funding of a 'Major Road Network' of strategic and major A-roads in England critical to the nation's economy and mobility. From 2020, vehicle excise duty will be ring-fenced to create a Roads Fund and the Government has agreed to use this to fund A-roads forming part of the Major Road Network alongside the Strategic Road Network.

Informing motorists: We have worked with the DfT and Highways England to improve the experience for motorists going through roadworks on the Strategic Road Network. This includes informing users why works are there, the length of time to travel through the works, and more appropriate speed limits.

Lowering the cost of motoring



Pump prices: RAC Fuel Watch, which monitors fuel prices, has been successful on numerous occasions in persuading retailers to reduce their pump prices faster than they otherwise would have when wholesale costs fall.

Fuel duty freeze: We repeated our call for the Chancellor not to raise fuel duty in the Budget and he maintained the freeze for the sixth year running.

Insurance costs: With insurance costs a major concern, the RAC, along with others has successfully campaigned for action to tackle fraudulent whiplash claims and a review of the formula for setting the discount rate for life-changing personal injury compensation claims.

Cleaner air



Greener vehicles: We continue to encourage the Government to provide better incentives for motorists to switch to greener vehicles and we highlighted the negative impact the revised vehicle excise duty rates for new cars would have on this.

Air quality strategy: We encouraged the Government to consider better traffic light sequencing, replacing speed humps with speed cushions and encouraging non-idling measures, and these are included in the Government's Air Quality Strategy proposals. We will support efforts to improve air quality in towns and cities but continue to call for fair treatment of motorists who were encouraged to buy diesel vehicles because of their lower greenhouse gas emissions.

A better deal on parking



Pavement parking: We worked successfully with the Scottish Government to bring forward fairer pavement parking proposals for Scottish motorists and we will continue to be involved with this issue going forwards.

Private parking standards: We are working with MPs to bring forward a Bill to introduce minimum standards in the private parking sector to prevent motorists from being ripped off.

Our consultation responses can be found at:
www.rac.co.uk/press-centre#/documents

9.0 Who is the motorist?

Miles per year*



0-5,000 miles	32%	-2%
5,001-10,000 miles	36%	+3%
>10,001 miles	23%	+1%

Average annual mileage (all motorists)



09436
Miles **+335**

Number of cars per household



Households with one car	55%	+2%
Households with two cars	34%	no change
Households with three cars	8%	-2%
Households with four cars	2%	-1%
Households with five or more cars	1%	no change
Average number of cars in household	1.6	no change
Average number of cars in ABC1 households	1.7	-0.1%
Average number of cars in rural households	1.8	no change
Average number of cars in city households	1.5	no change

Age of vehicles



Average age of vehicles in 2017 (years)	4.9	+0.2
Motorists who own a car less than a year old	13%	-4%
Motorists who own a car 1-2 years old	16%	+2%
Motorists who own a car 2-3 years old	15%	+1%
Motorists who own a car 3-4 years old	14%	no change
Motorists who own a car between 5 and 10 years old	28%	-3%
Motorists who own a car more than 10 years old	15%	no change

This does not reflect the total UK car parc – SMMT figures show the average age of a car on the road in 2015 was 7.8 years. Our sample were asked to indicate the age of the vehicle they drive most often and as such does not account for any additional vehicles they own or drive.

10.0 Appendix

10.1 Research methodology

The RAC Report on Motoring 2017 is based on a large-scale online survey carried out by Quadrangle on behalf of the RAC. In total, Quadrangle interviewed 1,727 UK motorists (i.e. those who hold a full, current driving licence, drive at least once a month and have a motor vehicle in their household). The survey was conducted in May 2017, with the questionnaire taking around 30 minutes to complete. The sample was nationally representative of age, gender, socio-economic groups, all UK regions, and car ownership (company car drivers vs. private car owners).

10.2 Statistical reliability

Any figures taken from a sample of a population should not be taken as a precise indication of the actual figures for that population. The reported figures are estimates, within a small margin of error, of the actual figures. The margin of error varies with sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering: the margin of error is smaller for a 90% or 10% result than for a 50% result. In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with an example sample size of 1,000, and the actual sample size of the survey, 1,727.

Sample size	Reported percentage at 95% level of confidence				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000	±1.86%	±2.48%	±2.84%	±3.04%	±3.10%
1,727	±1.42%	±1.89%	±2.16%	±2.31%	±2.36%

How to read the above table: Assume the reported percentage, with a sample base of 1,000, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.89%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with a sample size of 1,727 will produce a percentage of 23%, plus or minus 1.89%, or within the range of 21.11% and 24.89%.

The 2017 survey results are in orange. The blue numbers underneath show the change since 2016.
*The remaining 8% responded by saying they do not know how many miles per year they complete

11.0 120 years of serving our members

We've been looking after the needs of our members and championing the interests of motorists since 1897



1897

Founded by Richard Simms as the Automobile Club of Great Britain



1907 Given royal approval by Edward VII – the Royal Automobile Club



1914 Launched the Motor Service Volunteer Corps to support the war effort

1901 Introduced uniformed patrols (guides)



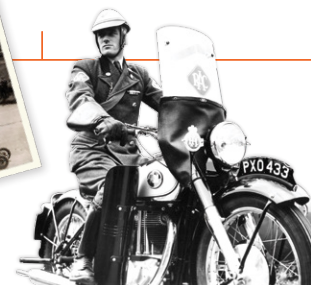
1912 Introduced roadside emergency telephone boxes



1926 Organised the first British Grand Prix at Brooklands



1928 'Get you home service' reaches 10,000 rescues



1932 First running of the RAC Rally



1940 Launched 'Help your neighbour' service to aid mobility during the Blitz



1941 RAC has a total of 500 roadside telephone boxes

1955 Founded the Roads Campaign Council to demand investment in the nation's highways

1962 The roadside salute comes to an end

1973 New style patrolman uniform

1975 RAC Recovery Service is launched as membership exceeds 1.5m

1979 New structure devised: RAC Motoring Services Ltd created

1986 Motorcycle patrols relaunched for city areas

1999 RAC demutualised in 1998 which led to its sale to Lex plc the following year

2000 Developed the rapid deployment trailer



1959 Introduced the first motorway patrols when the M1 opened



1967 Adopted the RAC blue rhombus logo



1977 The RAC Motorsports Association is formed



1982 RAC 'At Home' service launched



1988 Introduced RAC Computer Aided Rescue Service



2005 RAC acquired by Aviva



2010 Sponsored the first Future Car Challenge focusing on environmental issues in motoring



2012 Relaunched Business Services with Business Club for SME sector

2014 RAC Telematics launched to help improve business sector fleet management
GIC joins Carlyle Group as joint investor



2015 Launched RAC Fuel Watch campaign
RAC and Audi set a Guinness World Record for the most countries visited on a single tank of fuel
Carlyle sells its stake to CVC Capital Partners



2016 Launched RAC Car Passport vehicle history check
RAC name returned to motorsport with the RAC Rally of the Tests



2017



12.0 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 private motorists to sell their car free of charge, the RAC Vehicle Check gives would-be buyers valuable insight into a vehicle's past and RAC Black Box Car Insurance helps make insuring a car more affordable for young drivers.

As the UK's oldest motoring organisation – founded 120 years ago in 1897 – 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.

Credits

Report author: Chris Torney
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Advisory Panel

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

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Mike Hawes Chief Executive, Society of Motor Manufacturers and Traders	Stephen Reynolds Head of Road Safety Statistics, Department for Transport
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Connect

The RAC's news releases and a selection of images are available from the RAC's online press centre rac.co.uk/press-centre

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