



RAC Report on Motoring 2015

The speed of change



RAC Report on Motoring

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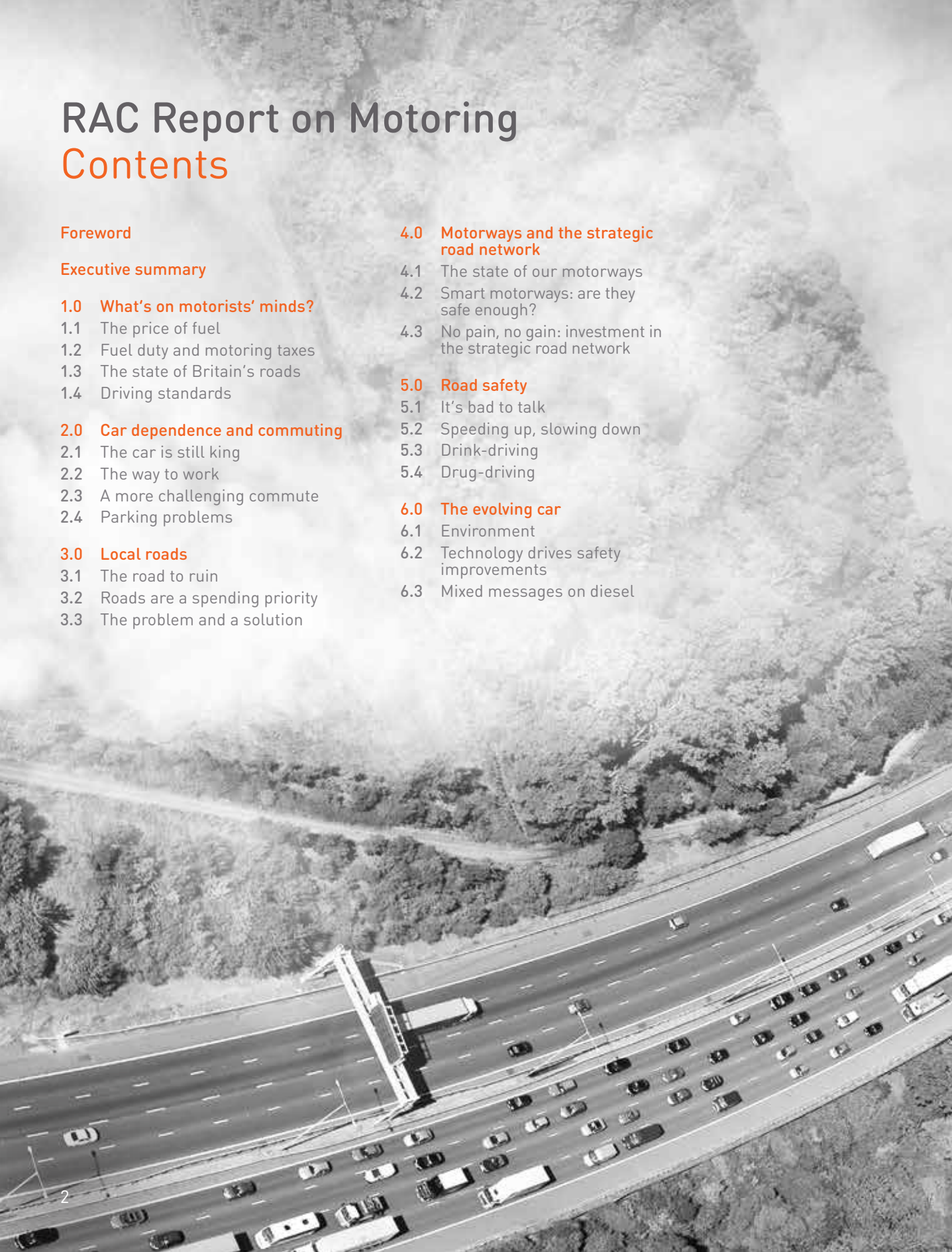
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Foreword

Nigel Mansell

Motorists are probably feeling a bit better about life than they were a year ago with fuel prices down and the Government committing more funding to improve our motorways and major trunk roads than we have seen in a generation. What this year's RAC Report on Motoring shows, however, is that motorists remain particularly concerned about driving standards and the behaviour of other motorists.



Driving standards have always been a passion of mine and in the ten years since I became president of the Institute of Advanced Motorists, I have had the opportunity to see at close quarters the work that the IAM, the RAC and other leading campaigners do to raise driving standards and improve safety on our roads.

Motorists taking part in this year's Report on Motoring survey clearly recognise the contribution that improvements in the cars we drive have made to the impressive reductions in casualty numbers that we have seen over the last 20 years. The motor industry is to be congratulated on this and of course a number of the safety features that we see in the cars we drive today owe their origins to developments in motorsport, something I benefited from in my motor racing career.

But respondents to the survey also told us that driving standards are deteriorating rather than improving, so all of us involved in campaigning on this subject still have much work to do.

The 2014 road traffic accident statistics have shown a further small increase in casualty numbers, suggesting that the trend of year-on-year casualty reductions, to which we have become accustomed, may be faltering. In recent years I have become increasingly concerned at the tragic toll among younger drivers. Over 10% of those killed or injured in a car accident are involved in a collision with drivers aged between 17 and 19 and yet 17 to 19-year-olds only make up around 1.5% of the total number of licensed drivers in the UK. Despite these statistics, the research for this year's report suggests young drivers are surprisingly far down the list of motorists' concerns.

This is where my interest in driving standards and my interest in helping young people to realise their full potential come together. For the last 16 years I have been president of UK Youth, a charity that tries to ensure that young people are able to develop into adults with the tools they need to become happy, healthy and valued members of society, no matter how difficult

their backgrounds. Safety is implicit in this and as a society we have to find ways of reducing casualties in accidents involving young drivers, whether by the use of technology in our cars such as telematics and automatic emergency braking systems, or by other measures such as the introduction of graduated licensing. I hope that by the time the 2016 Report on Motoring is published, the Government will be at one with this.

A large majority of the UK's adult population are motorists, and for more than a quarter of a century the RAC Report on Motoring has provided a perspective on the major motoring issues of the day. The 2015 report is no exception and I am delighted to have the opportunity to introduce it and I commend it to you.

Nigel Mansell

A stylized, handwritten signature in black ink, likely belonging to Nigel Mansell. The signature is composed of several large, overlapping loops and a long horizontal stroke at the bottom.

Executive summary

With around 38 million¹ motorists in Great Britain, the issues that are of the greatest concern to them must equally be of significance to Britain's politicians, policymakers, transport authorities and motor industry.

This year's RAC Report on Motoring paints a comprehensive picture of drivers' views on topics they think are most important, such as the condition of the nation's roads, fuel prices and the tax burden they face, as well as road safety and vehicle technology.

The report, which is based on quantitative research carried out with a representative sample of 1,555 British drivers, shows how concerns and attitudes are changing over time and also offers early insight into issues which may become more prominent in the future, such as driverless car technology.

The key findings in the 2015 report are as follows:

The poor condition of local roads is this year's issue of greatest concern

Over the past few years, the RAC and other industry bodies have repeatedly warned that not enough money is being spent on the maintenance and improvement of local roads.

It comes as little surprise, then, that half of motorists (50%) say the condition of roads in their area has deteriorated over the course of the past year. In 99% of cases, potholes and other problems with road surfaces are to blame.

For 10% of drivers the state of local roads is now their number one concern, while a further 20% list it as a top four issue. Motorists in Scotland and the South West of

1. www.gov.uk/government/uploads/system/uploads/attachment_data/file/411760/FOIR4427_-_Attachment.xlsx

2. www.parliament.uk/business/publications/written-questions-answers-statements/written-question/Commons/2015-01-28/222445

England report the worst conditions. Drivers' spending priorities reflect these concerns: 30% say local road maintenance is their top priority for government transport investment, and indeed 45% of motorists say they would pay higher motoring taxes if the revenue raised was ring-fenced for road maintenance.

The cost of fuel is less of a problem this year

The cost of filling up is still a widespread concern, but it is not as much of an issue as in previous years thanks to falling pump prices – and perhaps also rising average wages – over the past 12 months. **It remains to be seen, however, how long petrol and diesel prices can remain at their current level.**

Almost half of motorists (46%) support the ongoing fuel duty freeze, but there is some backing (32%) for the idea of replacing part of the duty either with more widespread motorway tolls or with increases in general taxation. Surprisingly, a third of drivers (34%) still underestimate the amount of money taken by the Government in duty and VAT on every litre of fuel purchased at the pump.

There is increasing concern about other drivers being distracted by mobile phones

The dangers posed by other motorists using their mobile phones to talk, text or go online are a growing worry for many drivers. More than a third (34%) say this is one of their top four areas of concern this year, but rather than increased penalties, most drivers (79%) want to see more effective enforcement of existing laws. Almost two-thirds (62%) believe there are not enough traffic police on our roads – hardly surprising given the fall in officer numbers over the past five years².

There is still a surprising number of motorists (12%) who think that it is acceptable to take a short call with a hand-held mobile phone while driving, despite this being illegal since December 2003.



Executive summary

The cost and convenience of parking is a significant issue

Most motorists (74%) report that **the cost of parking has increased in the past 12 months** while almost two-thirds (63%) say that there has been a drop in the availability of local town centre or high street parking spaces. There is also still concern that most spaces are too small for modern vehicles – 73% think they are not big enough.

So far as the charges themselves are concerned, 66% of drivers believe private companies' charges are unfair while 40% take the same view of local authority charges. And the vast majority (88%) think parking at hospitals should be free – this rises to 93% among the over-65s. A majority of drivers (58%) think that new rules which give those parking in paid local authority spaces a ten-minute grace period will not have an effect on the number of fines issued.

More motorists are likely to break the speed limit

Perhaps as a reflection of falling fuel prices and therefore fewer people trying to drive in the most fuel-efficient way, more motorists admit they have broken the speed limit in 2015 than in 2014. Seven in ten drivers (70%) say they regularly or occasionally break the 70mph motorway limit, and there is support (65%) for this to be raised to 80mph – a step the Government is reportedly still considering trialling on some sections of motorway.

On other roads, drivers are less inclined to speed with the corresponding percentages admitting to exceeding the 30mph and 20mph limits both being 44%. As more local authorities introduce 20mph zones, there appears to be little resistance to this from drivers: 61% say 20mph limits are appropriate where they are currently in place.

Low running costs are the main reason why drivers choose environmentally friendly vehicles

Environmental concerns are low on the list of motorists' priorities: only 2% rate them as their number one issue. But drivers will consider buying low-emission vehicles if they are cheaper to run in terms of fuel costs and Vehicle Excise Duty (VED). Almost one in five (19%) say they will consider buying a hybrid or electric vehicle as their next car – but for half (47%) of this group this would be because of an expectation of lower running costs rather than because of environmental benefits.

Motorists recognise the benefits that new technologies bring but are unwilling to pay very much extra for these

There is a recognition of the benefits that driverless cars will have for disabled and elderly drivers though only a quarter (27%) think such vehicles will make road travel safer. Motorists recognise the benefits that new technologies such as automatic emergency braking, telematics and dashcams can have on safety and security but appear unwilling to pay very much extra for these over and above the basic cost of the car.

More motorists admit to drug-driving and more want stricter limits on drink-driving

Over the past 12 months, 6% of motorists say they have driven under the influence of drugs, whereas in 2014 the rate was just 2%. However, this may be because the introduction of new drug-driving legislation has increased awareness of the effects of the 12 prescription drugs specifically identified.

In December 2014, Scotland tightened up their drink-driving laws and reduced the blood alcohol limit to 50mg/100ml. 56% of motorists support a cut to 50mg/100ml or less across the rest of the UK.



1.0 What's on motorists' minds?

Over the past 12 months, the overall economic situation in the UK has improved while in May, voters elected a majority Conservative government for the first time since 1992. >



46%

agree that the fuel duty freeze
should remain in place for the
foreseeable future

1.0 What's on motorists' minds?

With wages gradually rising and forecourt prices down, the cost of fuel – although still a significant drain on motorists' disposable income – is not quite the burning issue it was in 2014.

Apart from this, there have been few drastic changes in the areas of greatest importance to drivers since last year's RAC Report on Motoring was published.

Other major concerns have not changed dramatically over the past 12 months. Motorists remain particularly concerned about the deteriorating state of local roads. Meanwhile road safety issues are high up the list of concerns and particularly the illegal behaviour of other drivers; the use of mobile phones while driving, is a top four concern for the largest number of people.

In contrast, concerns about young driver safety and the environmental impact of motoring, which often feature prominently in the media, rank surprisingly far down the list.

Concerns motorists most worry about



8%

worry most about drivers talking on their mobile phones while driving



7%

are most worried about people driving without tax or insurance



5%

worry most about traffic congestion and longer journeys



are most
worried about
drivers under
the influence
of alcohol

of drivers are most concerned with the condition and maintenance of local roads

worry about
driver texting
or accessing
websites
when driving

worry most about
the cost of fuel

1.0 What's on motorists' minds?

1.1 The price of fuel

A sharp decline in global oil values, caused by an extended period of supply outpacing demand, sent the cost of fuel in Britain to a five year low last winter with petrol even falling below £1 a litre in one or two retail outlets. While the price of both petrol and diesel rebounded 10p a litre by the summer, prices were still on average 15p lower than the previous year, and it looks likely that we are set to enjoy a sustained period of lower pump prices as OPEC – Organisation of the Petroleum Exporting Countries – continues pumping crude at above demand levels in a bid to maintain its market share.

Despite this, the cost of fuel remains at the top of the list of issues most frequently cited by drivers as their number one concern, though the state of local roads now matches this. One in every ten drivers (10%) say the price of fuel is their top concern, while just over a quarter (26%) list the cost of petrol or diesel among their four main worries. This represents a significant drop, however, when compared with the 47% of motorists who included fuel prices as a top four issue in 2014 or the 63% who did so a year earlier.

The change is explained, at least in part, by the fact that in early 2015 the cost of petrol and diesel fell to levels last seen in 2010: at the start of February, the average price of a litre of unleaded was 106.09p, with diesel at 113.92p³.

This represented a fall of almost 25p per litre for petrol and just under 23p for diesel in six months, caused by a decline in crude oil prices. Brent crude oil, for example fell from \$115 a barrel in mid-June 2014 to a six year low of just over \$45 in January this year.

Crude oil barrel prices

JUNE 2014



JANUARY 2015



Percentage of drivers who say the cost of petrol or diesel
is among their top four issues

2015

26%

2014

47%

2013

63%

1.0 What's on motorists' minds?

While the cost of a litre of unleaded did fall below £1 at a small number of retailers earlier in the year, this level is widely viewed as an effective price floor because of the large amount of duty and VAT imposed by the Government. On a £1 litre of petrol, only 25% of the price represents the actual cost of fuel, including distribution costs and profit for the producer and retailer, with the rest going to the Treasury.

An improving economy and rising wages have also helped reduce concerns about the cost of running a car, though there remain concerns about the cost of insurance, particularly among younger drivers. The Office for National Statistics (ONS) said the UK economy grew by 3% in 2014⁴, and that GDP was up 0.3%⁵ in the first three months of this year. Meanwhile, the ONS has also reported that wage growth reached 2.7% in April 2015⁶.



4. <http://www.ons.gov.uk/ons/rel/naa2/quarterly-national-accounts/q1-2015/stb-qna-q1.html>
 5. <http://www.ons.gov.uk/ons/rel/naa2/second-estimate-of-gdp/q1-2015/stb.html>
 6. <http://www.ons.gov.uk/ons/rel/lms/labour-market-statistics/june-2015/statistical-bulletin.html>
 7. www.rac.co.uk/press-centre/press-releases/diesel-wholesale-cheaper-than-petrol-throughout-july
 8. www.rac.co.uk/press-centre/press-releases/drivers-want-fuel-price-cap-at-motorway-services
 9. www.bbc.co.uk/news/business-21258809

Perhaps as a result of a growing "feel-good factor", two-thirds of motorists say their expenditure on fuel has either fallen or stayed the same over the past 12 months. However, the cost of fuel remains a particular concern among drivers who cover high mileages, as well as some less affluent motorists where there is little or no practical alternative to the car for essential journeys.

But motorists are unlikely to be complacent about the cost of filling up given the price volatility seen over recent years. By June this year, the price of petrol had crept back up to 117p a litre while diesel was 120p on average⁷ and it would only require a fresh increase in world oil prices or a drop in the value of sterling against the dollar to drive the cost of fuel back towards the levels seen in mid-2014 and back up the list of motorists' concerns.

Another issue for motorists is the large difference in prices charged by retailers. Competition between supermarkets appears to help keep prices low, and the presence of a supermarket tends to ensure the prices charged by other fuel retailers within the area are competitive. But the significantly higher amounts typically charged by motorway service stations urgently needs to be addressed by the Government. Research carried out recently by the RAC found that motorway service stations were charging up to 15p a litre more than retailers elsewhere⁸.

At the start of 2013, an investigation by the Office of Fair Trading into the fuel retail market recommended that signs should be used alongside motorways displaying prices at upcoming services to help drivers seek the cheapest provider⁹.



1.0 What's on motorists' minds?

The coalition government said two years ago that it would introduce such measures, but although a pilot scheme on a section of the M5 in the South West has been announced, progress on this matter remains frustratingly slow¹⁰.

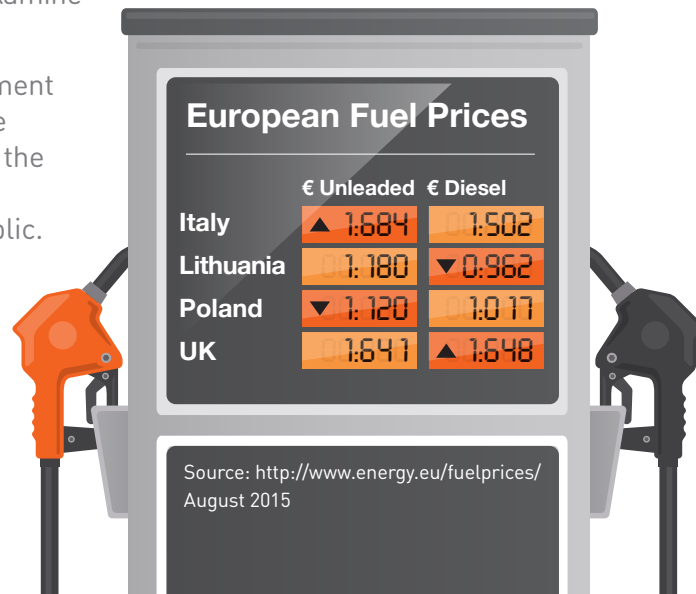
And in another example of a dysfunctional fuel retail market, drivers of diesel vehicles failed to see any benefit when the wholesale price of diesel dropped below that of petrol in the second quarter of 2015.

RAC figures from June this year highlight the problem: during the month, retailers were paying distributors between 1p and 3p a litre less for diesel than petrol. Yet unleaded typically remained as much as 5p a litre cheaper and only in July did we start to see retailers bringing diesel prices down to below petrol prices. With such pricing aberrations still a feature of the market, the RAC believes that the Competition and Markets Authority should re-examine the retail motor fuel market.

There is clearly a strong argument for greater transparency in the prices charged at the pump in the interests of fairness both to retailers and the motoring public.

The price-competitiveness of individual filling stations is typically judged according to the price they charge for a litre of unleaded petrol, so it may be that retailers have been artificially keeping petrol prices low at diesel's expense. But with the volume of UK diesel sales running 60% higher than petrol at the moment, this practice is proving extremely costly both for private motorists and for businesses, particularly Small to medium-sized enterprises (SME) that are too small to benefit from bulk purchasing arrangements. At the end of July, UK diesel prices were around 10p/litre higher than in any other EU country and in most cases the gap was far greater than this. With road transport contributing to the cost of most goods and services, this inevitably has a knock-on effect on the competitiveness of the UK.

Highest and lowest EU fuel costs



10. www.gov.uk/government/news/petrol-price-signs-on-motorways



"Improving economic conditions and rising average wages are surely an important backdrop to the decline in concern about fuel costs."

Motorists think of the price of petrol and diesel relative to their income, so fuel costs may not have changed dramatically but if earnings are going up, it is likely to affect motorists' perceptions."

David Davies

Executive Director, Parliamentary Advisory Council
for Transport Safety

1.0 What's on motorists' minds?

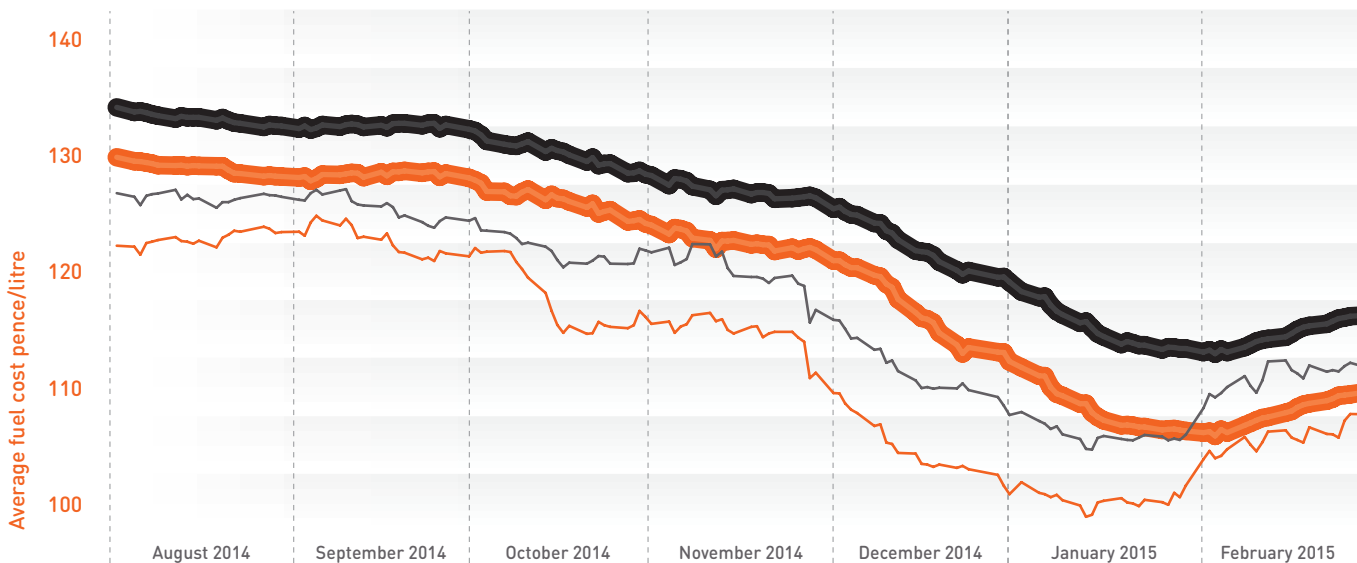
1.2 Fuel duty and motoring taxes

Awareness amongst motorists of what proportion of pump prices goes to the Government in the form of tax is relatively low. Only four in ten (39%) motorists correctly identified that between 60p and 79p of a 105p litre of petrol would go to the Treasury in the form of duty and VAT. The number that underestimate the amount of tax paid was 34%, while 18% think that 80p or more per litre is paid in tax.

The more experience drivers have, the more likely they are to have an accurate idea of what proportion of fuel prices is tax with 53% of those with over 40 years driving experience identifying the amount correctly.

The RAC would still like to see till receipts for fuel itemised so that the amount paid in tax is clearly highlighted.

The freeze on fuel duty implemented by the coalition government in 2011 remains popular and has helped keep the cost of petrol and diesel under control. Almost half of motorists (46%) agree that the freeze should remain in place for the foreseeable future, and in his Summer Budget Chancellor George Osborne confirmed the freeze would be extended until at least the end of 2015. But by failing to extend the freeze further than the start of 2016, the Government does invite concerns that an increase might be on next year's agenda, despite the proven link between fuel prices and economic growth. The RAC calls therefore upon Government to extend the freeze on fuel duty for the full-term of this parliament.





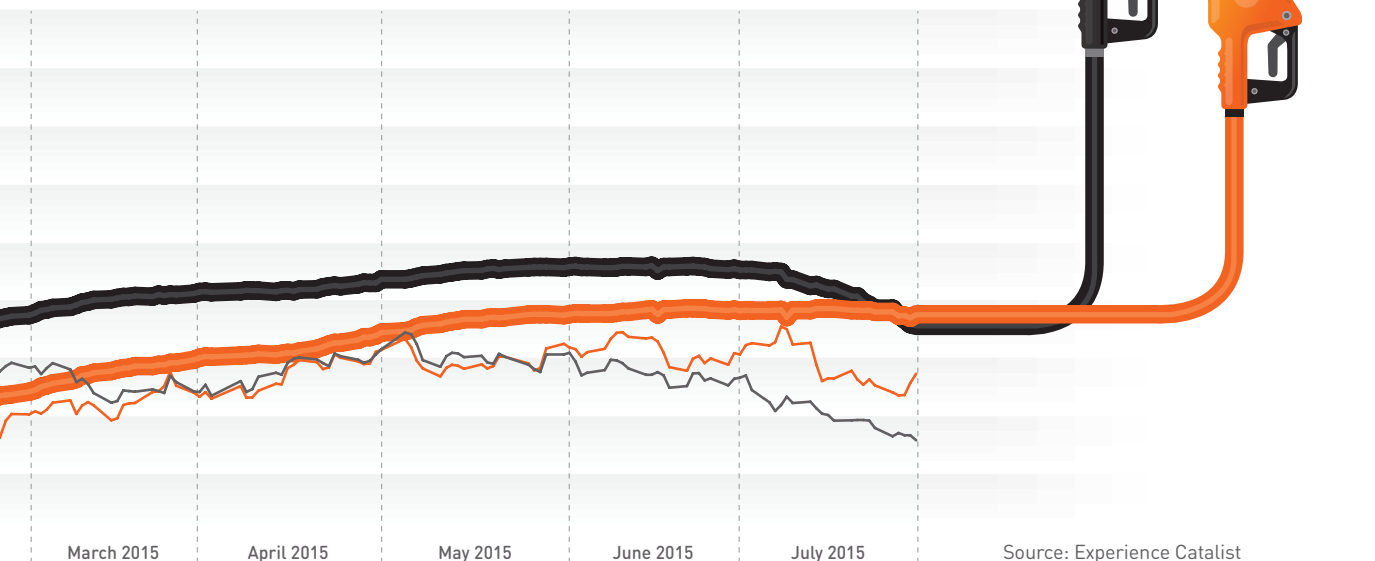
"Despite fuel prices coming down in 2015, the Report shows that the cost of fuel remains a top concern for motorists."

This is a timely reminder to the Chancellor that whilst he has frozen duty for the remainder of 2015, he risks a huge backlash from motorists if he proposes an increase in 2016. With the UK having some of the highest fuel prices in Europe, the economic arguments favour a reduction rather than an increase in duty and indeed with so much overwhelming evidence that low fuel costs stimulate economic activity there's now no credible fiscal reason to ever justify raising fuel duty again."

Quentin Willson,
Motoring Journalist, Broadcaster and
FairFuelUK Campaigner

The cost of fuel

 Retail Diesel
  Wholesale Diesel
 Retail Unleaded
  Wholesale Unleaded



Source: Experience Catalyst

1.0 What's on motorists' minds?

Meanwhile, 18% of drivers think that fuel duty should be cut and other motoring taxes – for example motorway tolls – introduced to make up any shortfall. And 14% would like to see a cut in fuel duty offset by increased general taxation such as income tax or VAT.

There is limited support for a rise in duty: 12% of motorists think this would be a good way of raising tax revenues to help fund the likes of the health service or education, while one in ten (10%) feel that higher duty could help to encourage road users to purchase more fuel-efficient vehicles.

The RAC, however, believes that fuel duty is a very inefficient way for the Treasury to raise revenues because of the direct impact it has on economic growth. A report published by the Centre for Economic and Business Research and the National Institute of Economic and Social Research on behalf of FairFuelUK in 2012 found that increases in fuel duty had a direct impact on economic growth and led to a reduction in employment, lower consumer spending – resulting in reduced VAT receipts – and higher benefit payments due to the associated impact on jobs.



The extension of the Government's rural fuel rebate scheme has been a welcome development this year: in addition to the five islands originally covered by the rebate, 17 more mainland communities are now eligible for a 5p-a-litre reduction in duty. These areas – mainly in the Scottish Highlands and the north of England – have low population densities and are remote from refineries and fuel distribution centres, and therefore face relatively high petrol and diesel costs.

 18%

of drivers would like to see the Government cut fuel duty and replace any loss of taxation by other motoring taxes – e.g. motorway tolls

 14%

of drivers would like to see the Government cut fuel duty and replace any loss of taxation by increasing other non-motoring taxes e.g. income tax or VAT



1.0 What's on motorists' minds?

1.3 The state of Britain's roads

For one in ten motorists (10%), the condition and maintenance of local roads is their top concern, making it an issue as significant as the cost of fuel.

A further 20% of drivers say the state of local roads is one of their four biggest worries. It is clear that, despite a £6bn investment announced in late 2014 by the Government, there remains much more to be done¹¹.

Half of motorists say that the state of roads in their area has deteriorated over the last 12 months. Of this group, 99% blame potholes and problems with road surfaces. A majority of drivers think that dealing with local road issues should be a priority when transport investment decisions are made, while 30% think this should in fact be the Government's number one transport spending priority.

There is less concern about the state of the nation's motorways: this is the top issue for just 3%, while a further 10% cite it as a top four concern.

Across the general motoring population, congestion and journey times appear to be less of a problem than might be expected: 5% of drivers say this is their number one concern, while overall 18% think it is one of their four main worries, which represents a small decrease on the 21% reported in 2014. For people who drive a company car or whose car is part of their business, the picture is quite different. Among this group, 12% say slow-moving traffic and delays to journeys is their biggest concern, while another 25% of business or company car drivers cite congestion as one of their top four issues.



of all drivers say congestion and journey times are their number one concern

11. www.gov.uk/government/news/6-billion-funding-to-tackle-potholes-and-improve-local-roads



50%

of motorists say that the state of roads in their area has deteriorated over the last 12 months



30%

of drivers think that dealing with local road issues should be the Government's number one transport spending priority

1.0 What's on motorists' minds?

1.4 Driving standards

There is widespread concern among motorists about the potentially hazardous behaviour of other road users. Particularly worrying is the use of mobile phones while at the wheel: 34% say that drivers who talk on their phones without using a hands-free kit are one of their top four concerns. The same proportions cited texting or using mobiles to browse the web as a major concern.

Certain other dangerous or anti-social practices appear to be less of a worry in 2015. For example, a quarter of motorists (26%) are concerned about uninsured and untaxed drivers but this is considerably less than the 35% recorded in 2014 or the 37% in 2013. Lower concern about drivers who are not properly insured reflects figures from the Motor Insurers' Bureau which suggest that the number of uninsured drivers has halved over the past decade¹².

But the RAC is concerned that the new computer-based vehicle excise duty system, which was ushered in last autumn, may lead to more drivers trying to evade paying VED given they no longer need to display a tax disc. As the purchase of VED involves the DVLA checking that the car in question is insured, this could in turn lead to a rise in the number of uninsured vehicles.



26%

of motorists are concerned about uninsured and untaxed drivers but this is considerably less than the 35% recorded in 2014

12. roadahead.mib.org.uk/ArticleRoadAhead.asp?Token=F8625712-E211-47F7-BBFD-4519C0204547

Meanwhile, there has been a sharp decline in the number of people who think the cost of car insurance is a major concern. In 2015, only 18% cite it as one of their top four issues, against 28% in 2014 and 35% the year before.

 34%

say that drivers who talk on mobile phones without using a hands-free kit are one of their top four concerns

1.0 What's on motorists' minds?

However, in the summer 2015 Budget, the Chancellor George Osborne announced that the insurance premium tax that applies to general insurance policies including motor cover will be increased from 6% to 9.5% from November 2015. As a result, drivers are likely to see their premiums rise, and concern about the cost of cover may therefore rise in future years.

There has been a slight increase in concern about younger drivers under the age of 21, who, insurers' statistics tell us, are more likely to be involved in road traffic accidents. Overall, 8% of motorists say this is a top four issue they are worried about, a rise on the 6% recorded in 2014. However, the general level of concern on this subject remains surprisingly low given the high level of visibility of this issue in the media.

And more people are concerned about older drivers – those aged 70 or above.

One in ten motorists (10%) cite this as one of their four main worries. Department for Transport figures published in March this year show there are 4.3 million full licence holders in the UK aged 70 or over – this is more than a tenth of all drivers. The figure includes 1.2 million aged 80 or older, 83,000 over 90, and 226 drivers who have celebrated their centenary¹³. And with an ageing population, these numbers are set to rise in future years.

According to the Department for Transport, there was a sharp increase in accident rates among car occupants aged 60 or over in 2014: the number of those killed or seriously injured rose by 10%, double the rate of increase (4.8%) in all age groups¹⁴.

 **4.3** million

full licence drivers in the UK are aged 70 or over

13. www.gov.uk/government/publications/a-breakdown-of-provisional-and-full-driving-licence-holders-by-age-and-gender

14. www.gov.uk/government/statistical-data-sets/ras30-reported-casualties-in-road-accidents#table-ras30002



10%

of motorists cite concerns about older drivers as one of their four main worries



Number of elderly licence holders
on UK roads

70
year-olds 4,300,000

80
year-olds 1,200,000

90
year-olds 83,000

100
year-olds 226

1.0 What's on motorists' minds?

There has also been a small rise in concern about cyclists' behaviour on the road – for example, jumping red lights, riding on the pavement, or cycling without lights or high-visibility clothing. This year, 16% of motorists say this is a top four concern, up from 13% last year.

Finally, the environmental impact of using a car remains surprisingly low down the list of motorists' priorities: only one in 50, or 2%, of drivers say this is their primary concern. And only a further 5% say it is one of their four leading concerns, indicating that environmental issues are no more important to motorists today than they have been in previous years despite the publicity received over the last 12 months relating to air quality concerns in our towns and cities and the associated impact on our health.



"I'm interested that concern about behaviour of cyclists on the road has gone up a bit. I think that's probably because there has been a lot...

... of media coverage of it, and also there are some places that have seen a lot more cyclists on the road, so they are more noticeable. To avoid pitting cyclists against motorists, we need to make sure the roads are safe for all who use them."

Stephen Joseph
Chief Executive
Campaign for Better Transport



16%

of motorists say that concerns about cyclist behaviour on the road is among their top four worries



7%

of motorists say the environmental impact of using a car is among their top four worries

2.0 Car dependence and commuting

Over the course of a typical week, most motorists will use a variety of modes of transport. The car remains the key way of getting around – but the extent to which drivers rely on their cars depends on how convenient, cheap and quick the alternatives are, which in turn is determined by where they live and where they want to go. >

IS YOUR CAR
READY FOR
WINTER DRIVING
CONDITIONS

 29%

of motorists say they have become
more reliant on their cars in the
past 12 months



2.0 Car dependence and commuting

Dependence on cars has a significant impact on motorists' shopping and leisure habits: the importance they place on being able to park at low cost and without hassle means they are likely to favour out-of-town retail complexes over their local high street if parking is scarce or over-priced in the latter.

2.1 The car is still king

An overwhelming majority of motorists would struggle to cope without their cars, this year's RAC Report on Motoring has found once again.

Eight in ten drivers agree with the statement 'I would find it very difficult to adjust my lifestyle to being without a car'. This dependence on cars has not changed significantly across the driving population when compared with responses to the same question a decade ago. Almost a third (29%) of motorists say they have become more reliant on their cars in the past 12 months against 9% who report the opposite.

London is the least car-dependent area in the UK with just 40% of motorists 'strongly agreeing' that they would struggle to adjust to life without their vehicles (the nationwide figure is 52%).

This is no doubt due to its extensive public transport network, high levels of congestion and expensive parking. These factors also mean that London is seeing the highest take-up of car clubs where, rather than owning vehicles outright, individuals can rent cars parked near their home for periods as short as an hour. Figures published recently by Transport for London show that at the start of 2015 there were already 135,000 car club members in the capital¹⁵.

Car clubs can be a more cost-effective way of having the use of a car for those journeys where only a car meets the need. And given the higher cost of living in London, this could be one way for residents to keep their travel costs down.

Car dependence increases gradually with age and, unsurprisingly, motorists who have company cars or whose vehicles are used as part of their work are the most reliant on being able to drive – of this group, 91% strongly agreed that it would be difficult to adjust to life without a car.

15. tfl.gov.uk/cdn/static/cms/documents/tfl-car-club-strategy.pdf



"There is a movement with young people, particularly in cities like London, away from car ownership. They are taking advantage of car-loan schemes...

... and car clubs, where you can have a vehicle for anything from three hours to three weeks. For example, some people might decide to hire a Smart Car to use in the city during the week because it is small and easier to park, but they might choose something bigger, like a Volvo or BMW, at the weekend for trips out to the country. There are a growing number of younger motorists who want the use of a vehicle but not ownership."

Sarah Sillars
Chief Executive
Institute of Advanced Motorists

 **135,000**

London car club members in 2015

2.0 Car dependence and commuting







2.2 The way to work

A majority of motorists use cars as the principal means of getting to work with 50% driving themselves and a further 13% travelling as passengers with a family member, friend or colleague. Use of a car for the daily commute is particularly high in the North West, where 57% of motorists drive themselves to work. This statistic should be borne in mind by the Government when drawing up plans to improve the transport infrastructure in northern England as part of its 'Northern Powerhouse' initiative. Just under two-thirds of motorists (62%) use other forms of transport instead of, or as well as, their own cars when commuting. 15% of motorists use some form of public transport to get to work. Walking is the way of getting to work for 12% of motorists, while 4% cycle.

As might be expected, there are significant differences in commuting modes depending on where people live. Residents of Britain's towns and cities are more likely to rely on public transport, with 32% doing so – and in London this rate climbs to over half (55%). A fifth of urban dwellers walk to work, though many of these do so in combination with other modes of transport whilst in London almost one in ten cycles.

Men make up the majority (59%) of cyclist commuters; however, this is not surprising given that Department for Transport figures show that 20% of men in England cycle compared with just 10% of women¹⁶.

The list below summarises the majority of motorists' journeys to their workplace:

	50%	of motorists drive themselves
	13%	travel as passengers with a family member, friend or colleague
	62%	use other forms of transport instead of, or as well as, their own cars when commuting
	15%	use some form of public transport
	12%	take the healthy option of walking to work
	4%	cycle their way through the traffic

16. www.gov.uk/Government/uploads/system/uploads/attachment_data/file/437001/local-area-walking-and-cycling-statistics-england-2013-14.pdf

 59%

of cyclist commuters are men



"The flexibility shown by drivers is the most interesting aspect of these findings. When you ask people what they think about congestion, they...

... are generally much more relaxed than you would expect them to be and I think that's because people adjust their times and their routes to avoid the most congested roads. It's a self-adjusting phenomenon."

David Leibling
Transport and Motoring Consultant

2.0 Car dependence and commuting

2.3 A more challenging commute

Commuting by car is not seen as a particularly enjoyable experience but the alternatives are widely viewed as being too expensive or too much hassle, according to this year's Report on Motoring. Of the 50% of motorists who use their car as the means of getting to their place of work, 45% say this is because public transport is 'impractical', while 44% say alternative options aren't quick enough.

More than a quarter (27%) say they need their cars to use in the course of their work. But only 11% say they commute by car because they enjoy driving. The perceived increasing prevalence

of roadworks is adding to motorists' pain: 69% say they now see more roadworks than a few years ago, while a majority (53%) report that their journey time has increased, either as a result of lane closures or general congestion. Drivers are finding innovative ways of dealing with these inconveniences. For example, 45% now say they make changes to the times they start and finish work in order to avoid the busiest periods on the roads.

For most motorists, public transport is simply not practical or cheap enough to provide a compelling alternative to the car. Over half (56%) say they would drive less if public transport options were 'better'.



"The data shows that congestion is actually declining as a concern. Perhaps people are becoming so used to being stuck in traffic jams that it's now just seen as part of their daily routine."

Graeme Paton
Transport Correspondent
The Times

Motorists' reasons for not using public transport

56%

of drivers agree they would drive less if public transport options were better

47%

say fares are too high

21%

say it's too crowded

25%

say it doesn't run on time



2.0 Car dependence and commuting

2.4 Parking problems

The cost and availability of parking spaces is a key factor for motorists when deciding whether to use their cars and where, for example, to go shopping.

Parking can be an emotive topic, and there are regular reports in the media about over-zealous parking wardens, cowboy clampers and sky-high hospital parking charges.

Whether it is the result of this type of coverage or due to bitter personal experience, a significant proportion of motorists feel they are getting an increasingly raw deal when it comes to parking. Almost three-quarters of motorists (74%) believe that parking is more expensive than a year ago in their local town centre or high street. Just under half (47%) think that fewer parking spaces are available on the street where they live, twice as many as the number (23%) that believe there are now more spaces.

Almost two-thirds (63%) say that there are now fewer high street or town centre spaces than a year ago, and the same proportion believes that increases in parking restrictions and charges are driving shoppers away from their local high street. Clearly, the difficulty and expense of parking in urban centres will inevitably have a hugely damaging impact on the businesses located there in the longer term.

Figures from the BRC/Springboard Footfall and Vacancies Monitor published in June 2015 showed that the rate at which shoppers were deserting town centres and high streets in favour of out-of-town retailers was increasing. Footfall in May 2015 was down 1.5% on British high streets and down 2% in urban shopping centres when compared with April¹⁷.



of drivers believe that parking is more expensive than a year ago

17. www.brc.org.uk/brc_news_detail.asp?id=2820&kCat=681&kData=2



of drivers say that there are fewer high street or town centre spaces than a year ago



2.0 Car dependence and commuting

The report blamed the exorbitant cost of high street parking as well as increased town centre congestion for this ongoing trend. But these are not the only problems associated with parking: 73% of drivers think that the typical parking space is too small for today's cars, largely due to the width of most cars having increased in recent years to accommodate side impact protection systems and air bags. Government is clearly aware of this problem and has recently taken steps to encourage local authorities to make high street parking free, or at least more affordable.

And the way drivers pay for parking needs to be made simpler and fairer: 78% say that machines should offer the option to buy tickets with a credit or debit card, and 88% believe machines should always give change.

There is widespread mistrust of private parking companies. Two-thirds of motorists (65%) think their charges are unfair compared with just 40% who think the fees levied by local authorities are unfair. These fears will have undoubtedly been fuelled by a court case earlier this year regarding the legality of penalty charges levied by private parking companies.

In April 2015, judges in the Court of Appeal dismissed a case brought by a motorist from Chelmsford, Essex, who had claimed that an £85 fine for overstaying in a private car park was disproportionate and therefore unlawful.

In their ruling, the judges described the level of the fine as neither 'extravagant' nor 'unconscionable'. However, the Supreme Court is now hearing an appeal against this judgement.



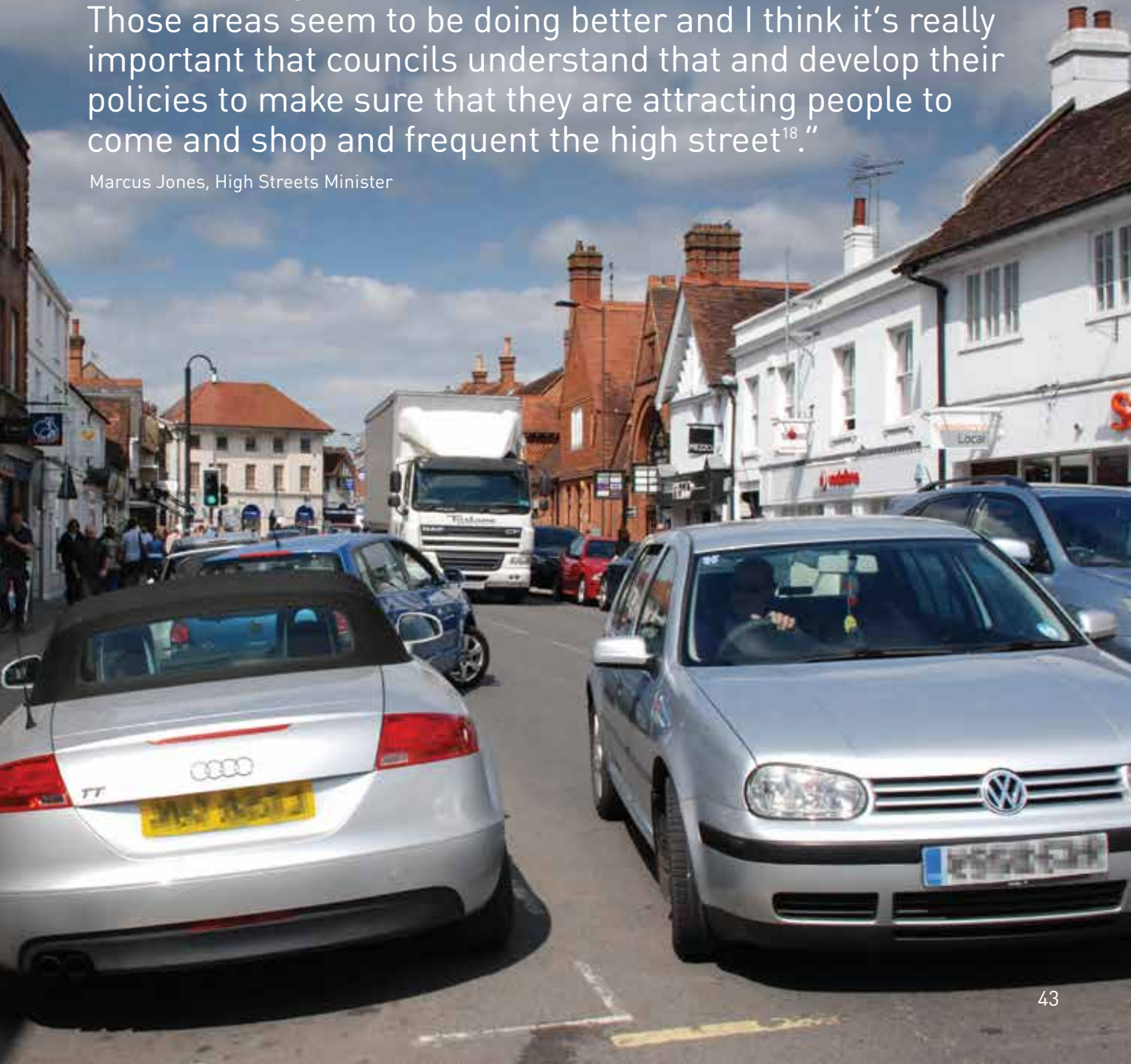
"There is also the issue that as people are getting older, they can't always check over their shoulder so freely. They also need more room to open doors in car parking spaces to get out more easily."

Sarah Sillars
Chief Executive
Institute of Advanced Motorists

18. <http://www.telegraph.co.uk/news/society/11747831/Free-parking-in-town-centres-to-save-the-high-street.html>

“You can look at examples around the country where [if meter-free zones], and in those areas where they are thinking very carefully about how they attract more people on to their high street and into those smaller town centres. Those areas seem to be doing better and I think it’s really important that councils understand that and develop their policies to make sure that they are attracting people to come and shop and frequent the high street¹⁸.”

Marcus Jones, High Streets Minister



2.0 Car dependence and commuting

A significant number of drivers (39%) are also concerned that their local council is using parking revenues to subsidise other areas of expenditure unrelated to motoring. However, this is dwarfed by concerns about parking at hospitals. Almost nine in ten motorists (88%) think parking in hospitals should be free – this view is even more prevalent among those aged 65 or older (93%).

Finally, there is scepticism that the Government's introduction of a ten-minute grace period on council-run paid parking spaces will lead to a reduction in penalty charges. Almost six in ten (58%) motorists say that the grace period – which is supposed to give drivers a bit of extra time to get back to their vehicles – will have no effect on the number of fines issued, presumably because they expect that the ten-minute period will be treated simply as part of the permitted parking period rather than as a contingency for unforeseen delays affecting drivers whilst returning to their vehicles.



of drivers are also concerned that their local council is using parking revenues to subsidise other areas of expenditure unrelated to motoring



of motorists believe the ten minute grace period will have no effect on the number of fines issued

 88%

of drivers think that parking at hospitals should be free



3.0 Local roads

It seems extraordinary – shameful even – that, given the expense of modern motoring, the number one gripe among drivers in 2015 is no longer the cost of car insurance or fuel, or the high level of tax they are compelled to pay, but the increasingly sorry state of Britain's local roads. >



 59%

reported roads in their villages or rural
areas have deteriorated since 2014

3.0 Local roads

For anyone who is aware of the chronic lack of adequate investment in highway maintenance in recent years, however, this should come as little surprise.

The 2015 RAC Report on Motoring found that for 10% of drivers, the condition of local roads was their prime concern, while a further 20% listed this issue as one of their top four concerns.

3.1 The road to ruin

Half of all motorists (50%) say that the condition of roads in their area has deteriorated in the past 12 months. Just one in ten (10%) say it has improved and the remainder report no change.

For the 50% who say roads are worse, the vast majority (99%) attribute this to potholes and general damage to the road surface; litter (24%) and poor maintenance of verges (21%) are also significant concerns.

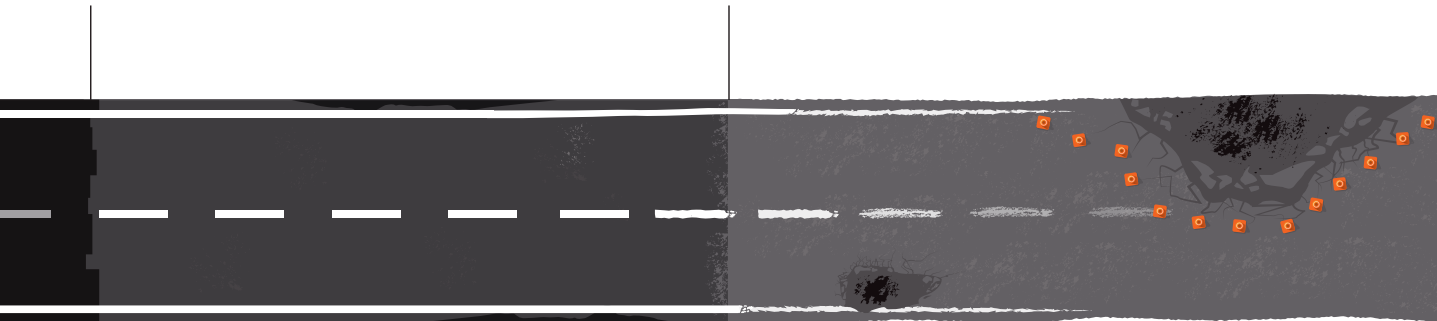
Road conditions are a particularly big worry in Scotland and the South West of England, where 19% of motorists say this is their top concern. The latter is not surprising given that Devon has one of the highest maintenance backlogs in the country. Londoners, however, are more sanguine: only 30% of motorists in the capital say their roads have deteriorated since 2014. This is half the rate (59%) reported among drivers who live in villages or rural areas.

10%

of motorists say the condition of local roads has improved

50%

of motorists say the condition of local roads has become worse





3.0 Local roads

These concerns are backed up by research carried out by the Asphalt Industry Alliance (AIA). Its Annual Local Authority Road Maintenance (ALARM) report published in March 2015 which covers England and Wales showed that, even though local authority spending on road maintenance had increased in the preceding 12 months, it is not rising quickly enough to deal with the deterioration in the condition of local roads.

The AIA says that the number of potholes has risen 33% since last year and the amount of money that would currently be needed to return English and Welsh local roads to a 'reasonable condition' has increased to £12.16bn (England £11.5bn) from £12bn in 2014¹⁹.

The Government has also recently published its own estimate of the cost of bringing back local roads in England to a state that is fit for purpose. They estimate a cost of up to £8.6bn as a result of



rise in the number of potholes
since last year

¹⁹. www.asphaltindustryalliance.com/news-press

applying less demanding criteria than AIA but never-the-less, the sum is large compared to the £6bn allocated by government to maintain local roads over the period to 2021.

Potholes are more than just a nuisance: as well as threatening the safety of road users they can cause serious damage to vehicles and bicycles, and either road users or local authorities have to foot the bills. The AIA says that councils in England have been forced to pay out more than £22m in 2014-15 in

compensation to drivers whose cars had been damaged by potholes and uneven road surfaces. This was twice as much as in the previous 12 months; to make matters worse, the figure does not include an extra £18m in administrative costs.

Nor does it take any account of the number of drivers who have themselves had to bear the cost of putting damage right – either because the local authority refused to accept liability, or because they were not aware they could make a claim.



£22m

in compensation to drivers whose cars had been damaged by potholes or uneven road surfaces

3.0 Local roads

3.2 Roads are a spending priority

Given the level of concern about the condition of local roads, it comes as little surprise that there is widespread support among drivers for government investment in their repair and upkeep. This year's Report on Motoring has found that three in every ten motorists (30%) say their number one priority for transport spending is the maintenance of local roads, while a further 48% cite this as a top five priority.

Targeted improvements to local roads, such as those designed to improve safety or reduce bottlenecks, are the top spending priority for 12% of drivers while 54% say this is one of their priorities.

Across all types of local authority spending, not just those related to transport, road maintenance is second only to education as motorists' top priority.

Against a backdrop of a Conservative Government which is trying to reduce the UK's deficit and aiming to run a budget surplus by the end of the decade²⁰, it is very clear that finding the money to address these problems will not be easy.

But a significant proportion of motorists appear to take a pragmatic view and would be willing to pay extra tax provided the revenues are used to address the state of Britain's local roads.



20. www.gov.uk/government/speeches/chancellor-george-osbornes-summer-budget-2015-speech



"I think this pragmatism reflects an underlying desire for more hypothecation – 'I'm willing to pay a bit more provided it's used for 'x' rather...

... than being put into a general pot". The fact that 60% of motorists want extra funding from the Treasury for road maintenance is hardly surprising given that there is far more extracted from road users in one way or another than is invested in roads."

Theo de Pencier

Non-executive board member, Transport Focus
Former Chief Executive Officer, Freight Transport Association

3.0 Local roads

Almost half of drivers (45%) agree with the statement: 'I would be willing to pay more motoring tax if the additional sums were ring-fenced to improve roads, compared with only 28% who disagree with this proposition.

At the same time, 81% of motorists agree that not enough of the taxes paid by road users are sufficiently reinvested into local roads. In his 2015 summer budget, the Chancellor announced that from 2020, receipts from vehicle excise duty would be ring-fenced to create a Roads Fund. The fund, however, will only go towards funding the next and subsequent road investment strategies which address the strategic road network and will not include local roads.

Current estimates²¹ suggest that drivers in the UK pay in excess of £40bn a year in taxes related to motoring, such as fuel duty, Insurance Premium Tax, Vehicle Excise Duty and VAT on fuel and other motoring-related expenditure.



81%

of motorists agree that not enough of the taxes paid by road users are sufficiently reinvested into local roads



"There seems to be a degree of pragmatism in terms of a willingness to pay a bit more tax to get a bit more benefit.

Maybe this is because people have a bit more money in their pockets and recognise that government doesn't have any more money to throw at the problem."

David Bizley
Chief Engineer, RAC

21. www.racfoundation.org/assets/rac_foundation/content/downloadables/Transport_finances_Bayliss_October_2014_final.pdf





3.0 Local roads

3.3 The problem and a solution

The figures highlighted in this chapter have shown that there is a significant and damaging disconnection between what a large proportion of council tax payers want local government to spend their money on and where it is actually going. This is at least in part a result of the inconsistent way in which central government devolves spending decisions to local authorities.

Maintenance of local roads was seen as second only in priority to education when it comes to prioritising local councils' expenditure. Under the coalition and now with the Conservatives in power, Government policy has been to devolve local spending decisions to local councils wherever possible. But the current constraints mean that certain types of spending must be prioritised by councillors: for example, they are under specific legal obligation to provide minimum standards in education and social services whereas the obligations for local authorities to maintain roads are far less prescriptive.

It is therefore inevitable that expenditure is biased against investment in the likes of road maintenance where prescriptive legal obligations do not exist and councillors therefore do not face legal sanctions.

The RAC believes that if government is to devolve all decisions on local roads to local authorities there needs to be a level playing field. This means that legal obligations need to be equally prescriptive – or non-prescriptive – for all types of expenditure so that local authorities have greater freedom to make spending decisions in accordance with the priorities of their council-tax payers. This needs to start as part of the Government's vision to build up the Northern Powerhouse and create strong city regions, led by powerful, democratically elected mayors. The RAC calls on the Government to ensure that these revitalised city regions have sufficient freedom to allocate expenditure in line with the priorities of their council tax payers so that local roads command the priority that they deserve.



"This survey shows clearly that local road maintenance is one of motorists' top priorities, yet it doesn't have the priority with...

... decision-makers that it should because it is relatively 'unsexy' compared to big projects. Motorists will not forgive the Government if local roads remain in poor condition while all the cash goes on smart motorways and other big transport projects."

Stephen Joseph
Chief Executive
Campaign for Better Transport

3.0 Local roads

Of course such a change in approach would require bold action from central government. But the RAC believes that the current approach is not sustainable in the longer term. Virtually all journeys start and finish on local roads and the majority of goods and services have a dependence on road transport. The state of our local roads will therefore rapidly become a damper on the health of the economy and on economic growth.

At the end of 2014, the coalition government announced £6bn of extra funding for local road maintenance between now and 2021²².

Any extra contribution from state coffers is of course welcome. But the Asphalt Industry Alliance says this will “only be enough for local authorities to tread water” and it will do “nothing to tackle the backlog or prevent continuing deterioration”²³.

A secondary issue is that too much of the debate about the state of local roads and the measures needed to improve matters focuses on potholes and the cost of repairing them. For example, when news of the extra £6bn road maintenance investment was announced, the Department for Transport described the spending commitment as “enough to fix around 18m potholes across the country”.

But this kind of language frames the problem misleadingly: potholes are simply the consequence of not undertaking preventative maintenance and of failing to invest in more hard-wearing road surfaces. These are the areas where spending is most urgently needed. RAC calls on the Government to follow the recommendations of the coalition government’s Pothole Review to ensure that the funds allocated to local roads maintenance are used for preventative maintenance of roads rather than just on short term remedial repairs.

A final issue is that local authorities often have to compete with each other to obtain central government money to spend on roads, sometimes employing the services of expensive consultants to make their case. This seems to be a rather perverse use of scarce taxpayers’ cash.



£6bn

of extra funding for local road maintenance has been announced between now and 2021

22. www.gov.uk/government/news/6-billion-funding-to-tackle-potholes-and-improve-local-roads

23. www.asphaltindustryalliance.com/news-press.asp?info=ALARM+survey+2015&start=0



"I am concerned that this has become a debate about how many potholes we plan to fill and even the Government is measuring local roads funding..."

... in terms of the number of potholes that can be filled for the money. What we actually need to do is to change the emphasis to resurface roads to prevent the potholes appearing in the first place."

David Bizley
Chief Engineer, RAC

Maintenance funding

North West
£625,186,000

West Midlands
£512,491,000

South West
£846,834,000

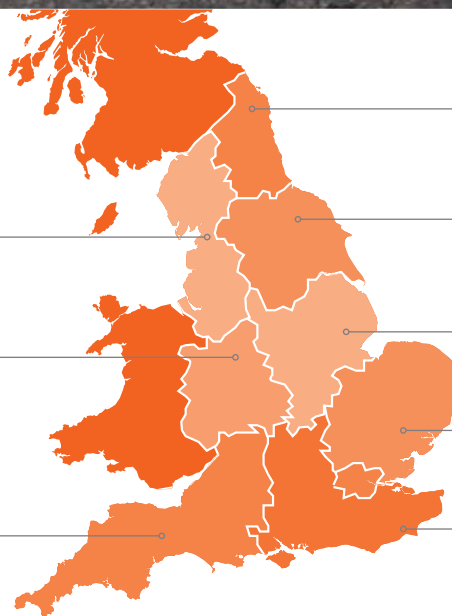
North East
£267,992,000

Yorkshire and the Humber
£488,548,000

East Midlands
£539,512,000

East of England
£644,626,000

South East
£777,811,000



4.0 Motorways and the strategic road network

In contrast to their views on the condition of local roads, only a minority of motorists feel that the state of the UK's motorways has deteriorated in the past 12 months. >



61%

of drivers say that targeted improvements to motorways and other major roads, such as removing bottlenecks, are one of their top five priorities for transport investment

4.0 Motorways and the strategic road network

Most drivers support the introduction of more smart motorways and welcome the extra capacity they create through variable speed limits and use of the hard shoulder as a running lane. But a majority still complain of increasing numbers of roadworks and longer journey times. Unfortunately, these issues are likely to get worse before they get better as a result of the Government's programme of motorway and major trunk road improvements scheduled over the next five years.

The Road Investment Strategy is essential to create a strategic road network that can support economic growth. Policymakers and other representative groups who have argued for long-term investment in the strategic road network need to make it clear to motorists that this short-term disruption is a price worth paying.

4.1 The state of our motorways

The condition and maintenance of motorways is the top concern of just 3% of motorists according to this year's Report on Motoring, while a further 10% cite this as one of their other top four concerns. By way of comparison, more than three times as many (10%) say the state of local roads is the most important issue.

But around a third of motorists (30%) – a significant minority – say the condition of motorways has deteriorated in the past 12 months (against 50% who take this view of local roads). Most of them (85%) blame problems with the motorway surface for this view, although litter (24%), lane-marking visibility (21%) and carriageway lighting (14%) are also concerns. This echoes research from Transport Focus published in July 2015 which found that better quality road surface was the top priority among drivers when it came to improvements of England's strategic roads²⁴.



of drivers say the condition of motorways has deteriorated in the past 12 months

24. www.transportfocus.org.uk/research/publications/road-users-priorities-for-improvement-car-and-van-drivers-and-motorcyclists



4.0 Motorways and the strategic road network

With regard to motorists' priorities for government spending on transport, maintenance of motorways and other major roads is second only to maintenance of local roads. Six in ten drivers (61%) say that targeted improvements to motorways and other major roads, such as removing bottlenecks, are one of their top five priorities for transport investment.

Congestion is, not surprisingly, seen as becoming a greater problem: 44% of motorists say that increasing traffic volumes over the past 12 months have led to more congestion, although the question addressed all major roads, such as motorways, high speed dual carriageways or major A roads. This figure rises to 55% in the North West, which is pertinent to government intentions to make large-scale infrastructure investment in the region as part of the 'Northern Powerhouse' initiative.

When faced with how to fund road improvements, motorists have mixed views. There is some support for an increase in the number of toll roads: in 2015, 41% of motorists say they support their introduction but only if offset by a reduction in other motoring taxes (up from 35% last year).

However, research for the Report on Motoring was undertaken just before the Government's announcement that from 2020-21, Vehicle Excise Duty will be ring-fenced to fund the next and subsequent Road Investment Strategies.

Finally, 70% of drivers say they regularly or occasionally break the 70mph speed limit on motorways, a far higher percentage than admit to breaking other speed limits.

In January 2015, it was reported that transport secretary Patrick McLoughlin was considering introducing 80mph limits on certain parts of the motorway network²⁵ and the coalition government originally proposed increasing the limit in 2011, but plans were shelved two years later. RAC therefore calls on the Government to clarify its position on a possible increase in the limit to 80mph.



70 70%

of drivers say they regularly or occasionally break the 70mph speed limit on motorways

25. www.thetimes.co.uk/tto/life/motoring/article4333117.ece



 41%

of motorists say they support an increase in toll roads but only if offset by a reduction in other motoring taxes

4.0 Motorways and the strategic road network

4.2 Smart motorways: are they safe enough?

Smart motorways, previously known as managed motorways, are becoming increasingly common in England. They are designed to increase motorway capacity and cut congestion through the introduction of variable speed limits and the use of the hard shoulder as a running lane, particularly during busy periods.

The programme was originally piloted on a stretch of the M42 in the Midlands, and 'smart' sections of motorway can now be found on the M1, M4, M5, M6 and M25. There appears to be good support for the introduction of smart motorways among motorists: a majority (56%) agree they are an effective way of increasing motorway capacity.

In the RAC's view, a question mark remains, however, over the safety of the newly introduced 'all-lane-running' configuration of smart motorways. In the 'dynamic hard-shoulder' configuration – used on the M42 pilot and the majority of other smart motorways now in operation – the hard shoulder is only opened for use as an extra running lane at busy times when extra capacity is needed, while under the all-lane-running configuration, the hard shoulder is permanently converted into an extra lane.

Dynamic hard shoulder smart motorways have been in use for some time, and have been shown to be significantly safer than conventional motorways with three lanes and a hard shoulder. This is due to a combination of reasons including close monitoring by Highways England through CCTV, variable speed limits that slow traffic down in busy periods and easy-to-reach Emergency Refuge Areas (ERAs) for use when users break down or are involved in an incident when the hard shoulder is in use as a running lane: on the M42, for example, ERAs are spaced between 500m and 800m apart.



of drivers agree smart motorways are an effective way of increasing motorway capacity



4.0 Motorways and the strategic road network

But on later implementations of the dynamic hard shoulder configuration and on the new all-lane-running sections, the ERAs are further apart at distances of up to 2.5km. In this situation, a driver whose vehicle suffers a catastrophic failure will have little alternative to stopping in the inside running lane and waiting for Highways England to spot them and close the lane to traffic. On a motorway with a dynamic hard shoulder, the inside running lane reverts to a hard shoulder and on all-lanes running, red crosses are displayed over the inside lane to instruct drivers to move over to the next lane.

Unfortunately, early experience suggests other drivers are less inclined to obey these lane closure signs on an all-lanes-running section of motorway than when the hard shoulder is closed to traffic on a smart motorway with the dynamic hard shoulder configuration. This places the casualty vehicle, its occupants and those providing assistance (the emergency services or roadside assistance providers) at greater risk. All new sections of smart motorway are expected to be based on the all-lane-running configuration.



RAC therefore calls on Highways England to monitor accident and casualty rates closely on those sections of smart motorway where all-lanes-running is in use and to consider reconfiguring these and planned sections of all-lanes-running motorway to have a dynamic hard shoulder.

Relatively few motorists have experience of driving on both smart motorway configurations and it is evident that the associated safety benefits are not generally

understood. A fifth (20%) of drivers responded that they believe that the dynamic hard shoulder configuration is less safe than a conventional motorway with a permanent hard shoulder, and a slightly higher percentage (25%) took a similar view for the all-lanes-running variant compared to a conventional motorway.

 **25%**

of motorists believe that all-lane running is less safe than a three lane motorway with a hard shoulder



4.0 Motorways and the strategic road network

Motorists were also asked about the variable message signs that are an important feature of today's motorways and which are also used more widely on the strategic network. These signs provide motorists with information such as the length of time it is likely to take to reach upcoming junctions and whether there is any congestion ahead or on other roads.

A majority (53%) think that the information displayed on such signs is useful, while 50% believe it to be accurate. But 36% still believe the accuracy of the information is poor or has deteriorated while a third (33%) say the information is not useful or has got worse.

Clearly therefore, there remains scope for improvement and we anticipate Transport Focus will provide regular feedback to Highways England on this as part of their measurement of user satisfaction.





OF DRIVERS THINK THAT
THE INFORMATION
DISPLAYED ON MOTORWAY
MESSAGE SIGNS IS USEFUL



BELIEVE THE
INFORMATION
TO BE
ACCURATE



OF DRIVERS STILL
BELIEVE THE ACCURACY
OF THE INFORMATION IS
POOR OR HAS DETERIORATED



OF DRIVERS SAY
THE INFORMATION
IS NOT USEFUL
OR HAS GOT WORSE

4.0 Motorways and the strategic road network

4.3 No pain, no gain: investment in the strategic road network

At the end of 2014, the coalition government published the first Road Investment Strategy (RIS), a long-term programme of improvements and investment in strategic roads in England²⁶.

The strategic road network in England consists of 1,865 miles of motorway and 2,571 miles of trunk A-roads, which are mainly high-speed dual carriageways. The network represents just 2% of all roads by length but carries around a third of all traffic.

The first five-year RIS, which runs until 2020-21, will see more than £15bn of approved funding invested in over 100 major schemes: this includes adding extra capacity through introduction of more smart motorways and tackling bottlenecks on other major trunk roads, creating 'expressways', reducing noise, making more of the network 'cycle-friendly' and improving safety.

Implementation of the RIS has catalysed significant changes for a number of related organisations. In April 2015, the Highways Agency became a company wholly owned by the Government, and was renamed Highways England. The Office of Rail Regulation has now become the Office of Rail and Road with new responsibilities for independent oversight of Highways England. Meanwhile, the independent passenger watchdog Passenger Focus has been renamed Transport Focus and will monitor the satisfaction of users of England's strategic road network.

Overall, this new process should help to put an end to the inefficiency and uncertainty – both for the construction industry and road users – that was a feature of the piecemeal, short-term approach taken by successive governments over the last two decades.

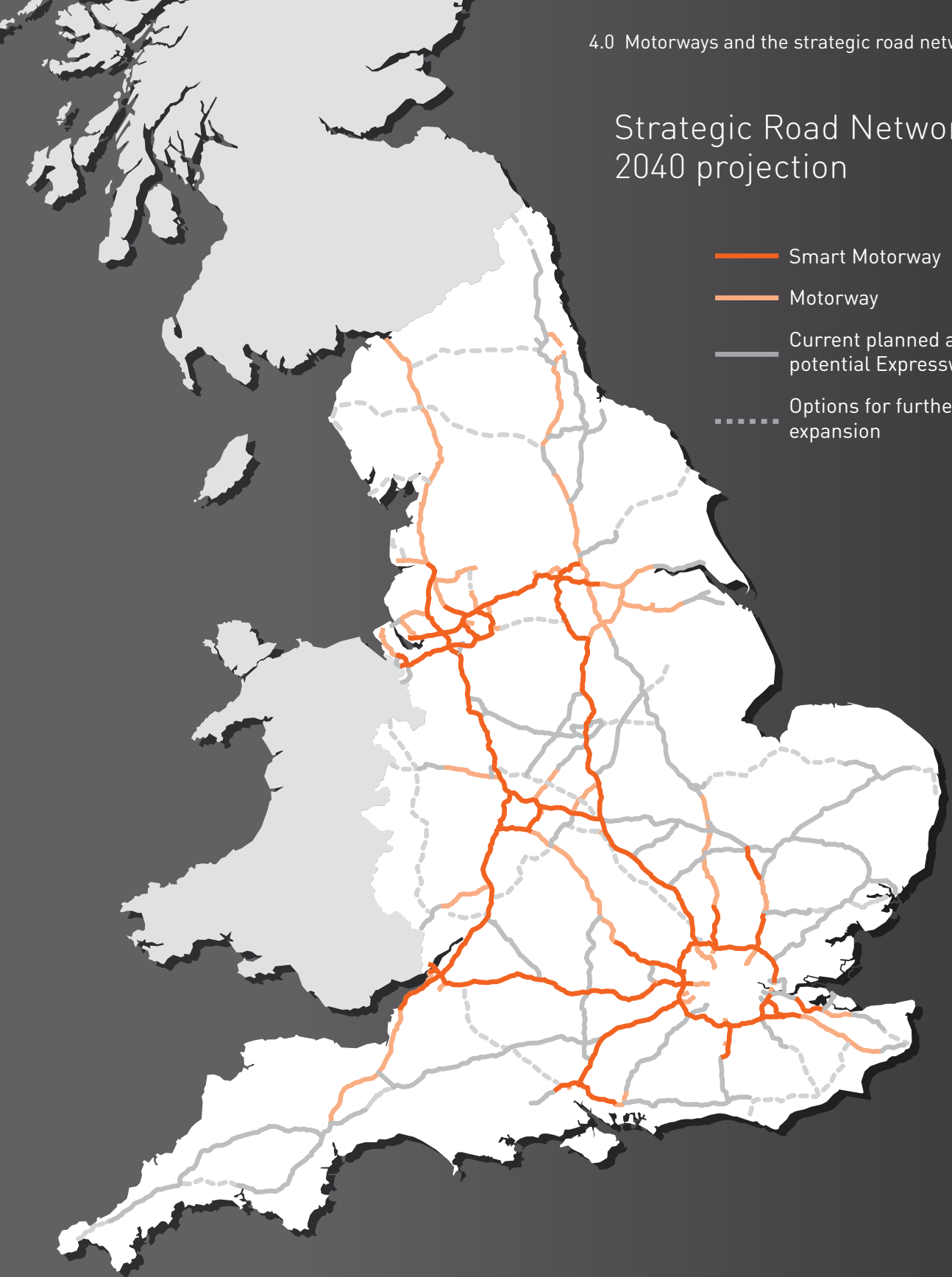
 £15bn

The first five-year RIS, which runs until 2020-21, will see more than £15bn of approved funding invested in over 100 major schemes

26. www.gov.uk/government/collections/road-investment-strategy

Strategic Road Network 2040 projection

- Smart Motorway
- Motorway
- Current planned and potential Expressways
- Options for further expansion



Source: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/408514/ris-for-2015-16-road-period-web-version.pdf

4.0 Motorways and the strategic road network

Highways England's role, however, is still not well understood by road users. This year's Report on Motoring found, for example, that 38% of drivers still admit to being confused by the role of Highways England's traffic officers, who help to keep traffic flowing by managing incidents to reduce the impact of congestion. Only 20% of motorists claim that they understand this role.

And with more than two-thirds (69%) of drivers saying that they are seeing more roadworks now than in previous years, Highways England faces a stiff challenge in ensuring that drivers understand its broader role in improving the network. The RIS will inevitably mean that there is a further increase in roadworks, congestion and delays over the next few years. RAC therefore calls on Highways England, and indeed all organisations which have argued for major investment in the strategic network, to make the case that these further delays and congestion in the short term is a price worth paying for a much-improved network that can support economic growth in the 2020s.

In his Budget in July 2015, Chancellor George Osborne unveiled a major change to the way future road investment strategies will be paid for: from 2020/21, all revenue collected from Vehicle Excise Duty will be ring-fenced and allocated to a new Roads Fund to be spent solely on strategic roads, with Scotland, Wales and Northern Ireland benefiting from this as well as England.

In Scotland, investment and maintenance on the strategic road network is managed by Transport Scotland. They are tasked by the Scottish Government to manage major projects through the Strategic Transport Projects Review (STPR) and the Infrastructure Investment Plan (2011). In Wales, the Department for the Economy, Science and Transport holds overall responsibility whilst in Northern Ireland this belongs to Transport NI.



of drivers say that they are seeing more roadworks now than in previous years



38%

of drivers still admit to being confused by the role of Highways England's traffic officers, who help to keep traffic flowing by managing incidents to reduce the impact of congestion



5.0 Road safety

Road safety and in particular the illegal and dangerous behaviour of other drivers is one of the most significant overall issues of concern for motorists in 2015. The use of mobile phones while at the wheel is an especially worrying issue. >



! 37%

think today's motorists are more
safety conscious



5.0 Road safety

There has been a small increase in the number of drivers who admit to breaking the speed limit – this could possibly be linked to the falling cost of fuel over much of the past 12 months.

The proportion of motorists who admit to drink-driving has not changed materially since 2014, but those who say they have taken banned drugs before driving has increased. However, this may simply reflect wider awareness of the dangers of certain prescription drugs following the introduction of new legislation in England and Wales in March 2015.

5.1 It's bad to talk

Drivers who use their mobile phones to talk, text or use the internet are right at the top of the most significant issues of overall concern to motorists this year.

Just over a third (34%) rank these potential dangers as one of their top four issues of concern in the 2015 Report on Motoring.

Almost nine in ten drivers (86%) believe that cars are safer now than in the past, but only 37% think today's motorists are more safety conscious. Three in ten (30%) believe driving standards are currently higher than in the past, but 41% think the opposite is true.



"Our latest figures show that the rate of drivers using hand-held mobile phones in cars is about 1-2%. Although this seems to be very low...

... it still means that every time you go out of the house, out of every hundred cars, there are going to be two people on the phone. And so, because you see a lot of vehicles every day, you see it happening frequently despite the low rate."

Daryl Lloyd

Head of Road Safety Statistics
Department for Transport



41%

of drivers believe driving standards
are currently lower than in the past



5.0 Road safety

Figures published by the Department for Transport in June 2015 show that there was a small increase in the number of road accidents in 2014: the number of deaths on the road rose by 4% compared with the previous year while those seriously injured rose by 5%. Part of the increase can be explained by the rise in road-traffic volumes, which were up by 2.4% over this period²⁷.

However, it is very difficult to say to what extent modern distractions such as smartphones and sat nav devices have had an impact on accident rates. The greater levels of concern recorded in this year's Report may be attributable to the fact that motorists are more aware

of mobile phone use by drivers as a result of widespread media coverage of the subject. Department for Transport statistics found that 1.6% of motorists in England and Scotland were observed using a hand-held mobile phone while in moving traffic in 2014²⁸.

The overwhelming majority of motorists (83%) think it is unacceptable to take even a short call with a hand-held phone while driving. But worryingly, 12% think this is a reasonable thing to do, up from 7% last year. Almost three-quarters (73%) think it is not safe to use a phone to text or check social media while in stationary traffic, although 17% believe this poses little danger.



"Rarely a day goes by without a mobile phone story somewhere in the media. Sadly it's the story that keeps on giving because of the number of...

... recognised figures – celebs or footballers – who get caught on camera, which suggests that many people still don't really understand the risks they are running."

Steve Gooding
Director
RAC Foundation

27. www.gov.uk/government/statistics/reported-road-casualties-in-great-britain-main-results-2014

28. www.gov.uk/government/uploads/system/uploads/attachment_data/file/406723/seatbelt-and-mobile-use-surveys-2014.pdf

29. www.theyworkforyou.com/wrans/?id=2015-01-28.222445.h&s=speaker%3A24825#g222445.q0

Motorists would rather see more consistent application of existing laws than higher penalties for the likes of mobile phone use. Almost eight in ten (79%) say there is no point in increasing fines or penalties unless there is effective enforcement, while 62% think there are not enough police on the roads to enforce driving laws.

An increase in the number of traffic police may be unrealistic given the fiscal challenges currently facing the Government, but the RAC calls on them to halt the decline in the number of traffic police officers. Ministry of Justice figures published earlier this year showed that the number of traffic police officers in England and Wales fell by 22.7% between 2010 and 2014²⁹.



"The behaviour of other drivers ranks very highly as a concern. Mobile phones are top of the list but other devices such as entertainment systems...

... can cause distraction. Despite cars being safer than ever, road casualty numbers increased last year and we have to find ways to ensure that drivers give 100% of their attention to the road ahead."

David Davies

Executive Director

Parliamentary Advisory Council for Transport Safety

5.0 Road safety

5.2 Speeding up, slowing down

This year there has been a small increase in the number of motorists who admit to breaking the speed limit. This could be because falls in the price of fuel over the past 12 months allied to rising wages mean that fewer people are worried about driving in the most fuel-efficient way possible and squeezing every last mile out of every tank of fuel.

Seven in every ten motorists (70%) say they regularly or occasionally break the 70mph motorway speed limit compared with 67% in 2014, and there is majority support for this limit to be raised at least to 80mph. This year, 65% of motorists back such a move, but this is a lower proportion than the 70% recorded in 2014. At the start of 2015, the coalition government said it was considering the revival of plans to introduce 80mph limits on parts of the motorway network³⁰.

Fewer drivers are inclined to break speed limits away from motorways, the Report on Motoring found: 44% admit to exceeding the 30mph urban limit (although this is a rise on the 42% recorded in 2014), 46% say they break 50mph and 60mph limits on country roads (43% in 2014) and 44% (unchanged) break

the 20mph limits that apply in increasing numbers of urban areas. Most motorists are happy with 20mph limits: 61% say this is appropriate. A significant minority (33%) believe however that the limits should be raised to either 25mph or 30mph.

The RAC supports the use of 20mph limits in residential areas in the vicinity of high-risk areas such as schools and known accident blackspots. However, some authorities are extending 20mph zones to through-routes which are important arteries for business and longer-distance travel, and where adherence to 20mph limits is reported to be poorest. The RAC therefore calls on the Government to issue clearer guidance to local authorities on when and where 20mph limits are most appropriate and inappropriate.



80 65%

support an 80mph limit on motorways

30. www.thetimes.co.uk/tto/life/motoring/article4333117.ece



"There has been a big expansion of 20mph zones in the last year or so, but the percentage saying the limit in these areas should be higher...

... is actually falling. That suggests that motorists are not resisting these; maybe they are seeing the benefits from the spread of 20mph zones and perhaps as residents want the areas they live in to be safer."

Stephen Joseph
Chief Executive
Campaign for Better Transport

5.0 Road safety

5.3 Drink-driving

There has been little change over the last 12 months in the number of motorists who admit to drink-driving or travelling in a car with a driver who is over the limit. Just under a fifth (18%) of motorists say they think or know they have driven while over the limit in the past 12 months, either shortly after drinking or the morning after. In 2014, the rate was 17% and 12% say they have been in a car driven by someone who was over the limit.

Younger drivers are more likely to drink-drive: 26% of those aged between 17 and 24 think or know they have done so in the past year. But concern about drink-driving is also highest among younger age groups: for 17 to 24-year-old motorists this is the biggest issue, being cited as the number one concern by 15% of them. This may reflect the greater level of first-hand experience of drink-driving that younger motorists have.

Despite official statistics showing that younger drivers are more likely to be involved in serious road-traffic accidents³¹ the coalition government did not manage to fulfil its pledge to publish a green paper on young driver safety. The RAC calls on the new Government to urgently make proposals on how safety among younger motorists could be improved.

This may involve wider use of telematics insurance policies – which base premiums on recorded driver behaviour – or a system of graduated licencing, which could limit the times at which teenage drivers are allowed the road, as well as restrict the number of passengers they are able to carry.

More than half (56%) of motorists think the blood-alcohol limit should be reduced at least to 50mg/100ml from the current 80mg/100ml level, as it was in Scotland in December 2014. The situation of having different limits in different parts of the UK is clearly unsatisfactory and the RAC calls on the Government to take steps to mirror Scotland's approach across the rest of the UK.



of motorists say they think or know they have driven while over the limit in the past 12 months

31. www.racfoundation.org/media-centre/teenage-driver-crashes-take-high-toll-on-young-passengers



5.0 Road safety

5.4 Drug-driving

In March 2015, the coalition government introduced new drug-driving legislation. This gave police the powers to use “drugalyser” devices at the roadside and identified 12 illegal and 12 prescription drugs which could impair drivers’ ability, leaving them open to prosecution under the new laws if police decide they are unfit to drive.

The Report on Motoring found that 6% of motorists say they have driven under the influence of drugs in the past 12 months, a sharp rise on last year’s 2%.

But this may be due to increased awareness of the fact that there are a number of legal drugs which can render motorists unfit to drive.

Worryingly, a sizeable minority of motorists (37%) do not believe the new law will reduce the number of drug-drivers on the roads. This is largely because drug-drivers are viewed as risk takers and so more likely to ignore such a law and risk being caught.

The Report also confirmed once again that drug-drivers are much more likely to be drink-drivers: of the 6% who admit to driving under the influence of drugs, two thirds (4%) also claim to have driven under the influence of alcohol.

Conviction rates may however understate how widespread drug-driving is given that police find it easier and cheaper to test for drink-driving. Penalties for the two offences are the same and in cases where motorists are suspected of being affected by both drugs and alcohol, police will tend to prosecute only for the latter.

Half of motorists (49%) think that drug-driving carries the same social stigma as drink-driving, while a quarter (25%) believe it is less socially acceptable. Just one in ten (9%) motorists view drug-driving as the lesser evil.



of motorists say they have driven under the influence of drugs in the past 12 months



"What we have found is that a lot of people who were taking their regular prescription drugs, such as for arthritis or intense pain relief for stomach issues...

... hadn't really understood that the drugs they were taking were the drugs being referred to in the legislation. Perhaps the number of people who admit to having driven under the influence of drugs reflects that these people hadn't previously realised they were doing anything illegal because their drugs were on prescription rather than illegal Class A. More work needs to be done to reassure drivers that sticking to a prescription is fine but any abuse of over the counter drugs risks a very severe penalty."

Sarah Sillars
Chief Executive
Institute of Advanced Motorists



6.0 The evolving car

The environmental impact of the cars they drive is low on the list of concerns of most motorists. A significant minority of drivers would consider buying some form of low-carbon vehicle as their next car, but this is mainly due to potentially lower running costs. >



 86%

of motorists believe that cars are safer
today than at any point in the past



6.0 The evolving car

Motorists are in favour of technology which can improve vehicle safety, but the extent to which they are willing to pay extra for such features is limited.

There are concerns about the safety of driverless cars, the development of which is being strongly supported by the Government, although most drivers recognise the benefits such vehicles could offer older and disabled people.

6.1 Environment

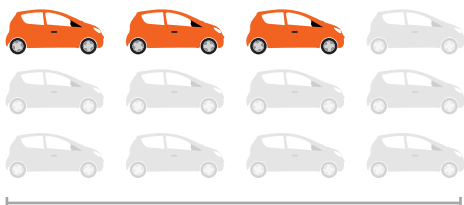
The potential impact of vehicles on the environment appears very low on the list of most motorists' concerns in the 2015 Report on Motoring.

Only one in every 50 drivers (2%) lists this as their top concern and, like last year, just 7% number the environment among their four greatest concerns. This is not to say, however, that drivers have no interest in low-emission vehicles: but the main factor behind choosing such cars is economic rather than social responsibility.

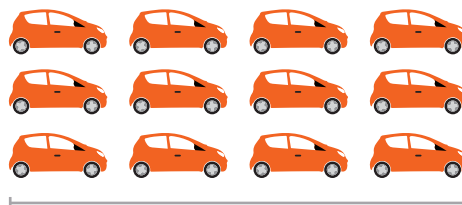
Almost one in five (19%) motorists say they would consider a hybrid or electric vehicle as their next car. But among this group, half (47%) say this would be because of the potentially low running costs rather than low emission levels.

Figures published in June 2015 by the Society of Motor Manufacturers and Traders (SMMT) show that sales of ultra-low-emission vehicles (predominantly pure electric cars such as the Nissan Leaf and plug-in hybrids such as the Mitsubishi Outlander) are increasing significantly. In the first five months of this year, purchases were four times higher than in the same period of 2014 – but nonetheless this sector represents little more than 1% of the total market.

11,842 ultra-low-emission vehicles were registered between January and May – a four-fold rise on the 2,838 registrations in the same period last year



January-May 2014



January-May 2015



19%

motorists say they would consider a hybrid or pure-electric vehicle as their next car

6.0 The evolving car

Figures from the Department for Transport show that between the start of 2010 and the end of March 2015, more than 36,000 ultra-low emission vehicles had been registered in the UK³².

Overall, combined hybrid and electric car sales add up to less than 3% of the UK new car market³³.

Among all motorists, running costs are the most significant factor when it comes to choosing a new car: 40% say this has the greatest impact on their buying decision, compared with 28% who pay more attention to the purchase price.

Changes to the Vehicle Excise Duty (VED) system announced by the Government in its summer 2015 Budget will reduce incentives to buy low-emission vehicles.

However, from 2017, only new cars which produce zero emissions will be exempt from VED in the first and subsequent years. Lower-emission models (up to 100g/km) will pay between £10 and £100 in first-year VED; after year one, all vehicles other than those with zero emissions will face a flat £140 annual charge. At present, cars which produce 100g/km or less in carbon dioxide permanently avoid VED. While falling tax revenues from the current VED system need to be addressed, the RAC has some concerns that this new regime may slow the significant progress that has been made in reducing carbon dioxide emissions from passenger cars and light commercial vehicles in the UK. As annual running costs play a significant part in the choice of new vehicle, the new regime from 2017 carries some risk of slowing the sales of low-emission vehicles.



36,000

ultra-low emission vehicles have been registered between the start of 2010 and the end of March 2015 in the UK

32. www.gov.uk/government/uploads/system/uploads/attachment_data/file/433828/veh0170.xls

33. www.smmf.co.uk/2015/06/new-car-registrations-grow-steadily-as-ultra-low-emission-vehicles-surge-past-10k-mark/

Electric Vehicle Charging Bay



"We recognise the current VED system needs to be reformed and SMMT highlighted this in a recent report. The Chancellor's Budget announcement...

... on the regime came as a surprise and is of considerable concern. While we are pleased that zero-emission cars will, on the whole, remain exempt from VED, the new regime will disincentivise take up of low-emission vehicles. As it stands, new technologies such as plug-in hybrid, the fastest growing ultra-low emission vehicle segment, will not benefit from the long-term VED incentive, threatening the ability of the UK and the UK automotive sector to meet ever stricter CO₂ targets."

Mike Hawes

Chief Executive
Society of Motor Manufacturers and Traders

6.0 The evolving car

6.2 Technology drives safety improvements

The vast majority of motorists (86%) believe that cars are safer today than at any point in the past and almost two-thirds (63%) say that in-car technology plays an important role. The extent to which drivers are willing to pay for additional safety measures is limited.

However, the likes of parking sensors (92%), automatic emergency braking (74%), dashcams (73%) and automatic self-parking (67%) are considered useful by a majority of motorists. But less than a third of drivers would be willing to pay more than £100 to have any of these features added, whether by manufacturers or after buying their car.

Telematics insurance policies are becoming more popular, particularly among younger drivers: these involve a unit being installed in a car to record factors such as speed, braking and cornering, and are designed to give motorists the chance to demonstrate to insurers that they are responsible, low-risk drivers and therefore deserving of

lower premiums. Research from Consumer Intelligence published in June 2015 found that take-up of telematics insurance was highest among drivers aged between 18 and 24, with 22% of men in this group and 14% of women using such policies³⁴.

It is widely believed that telematics policies can improve driver behaviour not only by providing a financial incentive to drive sensibly, but also by giving customers the chance to analyse data about their own driving habits and providing suggestions on how they can improve. The Report on Motoring found that 75% of drivers say a telematics unit would be a useful feature on their vehicle. But a significant minority – 30% – say they would be opposed to new technology which recorded how well they were driving. The level of opposition is even higher – 40% – among drivers aged between 17 and 24.



consider parking sensors useful
by a majority of motorists

34. www.iloveclaims.com/motor-insurance/consumer-intelligence-report-findings-on-telematics-views/



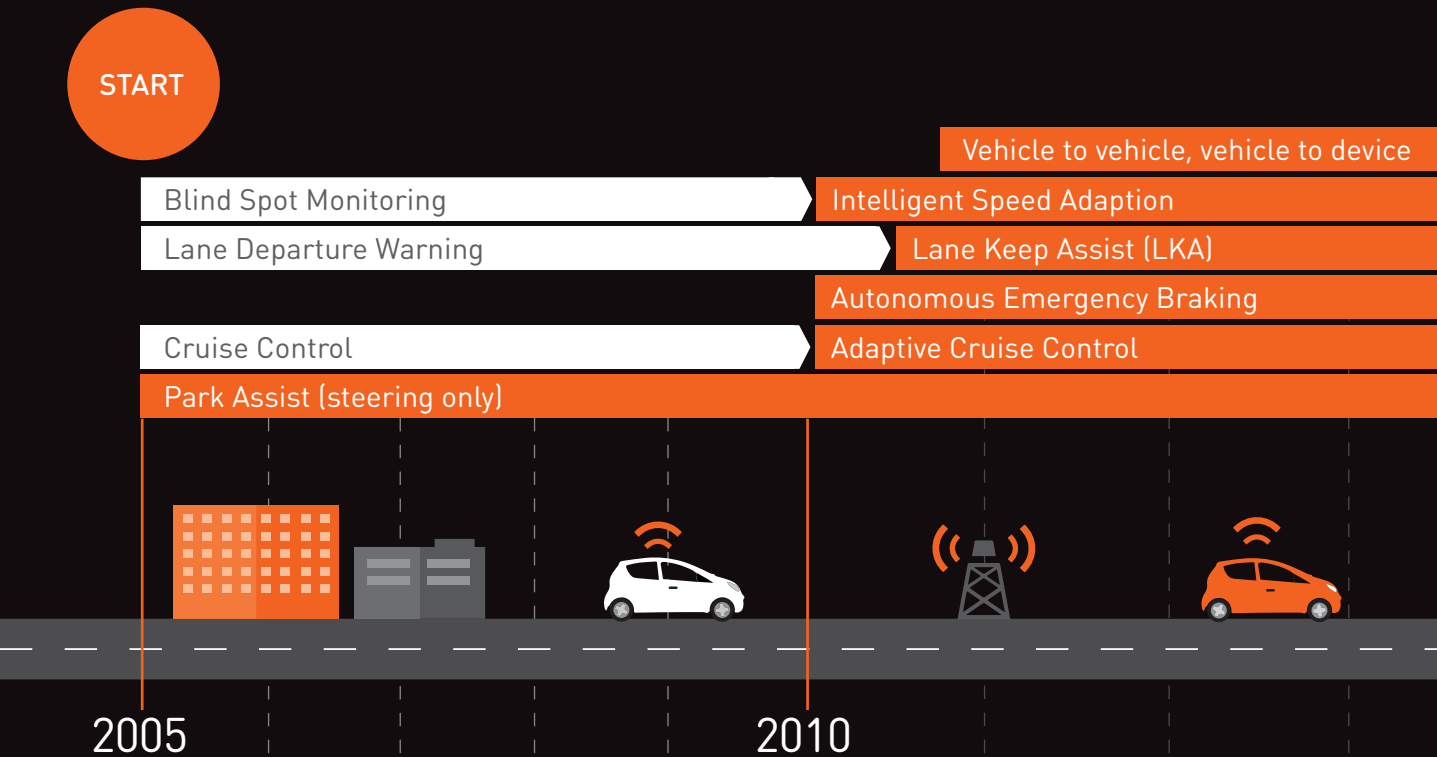
6.0 The evolving car

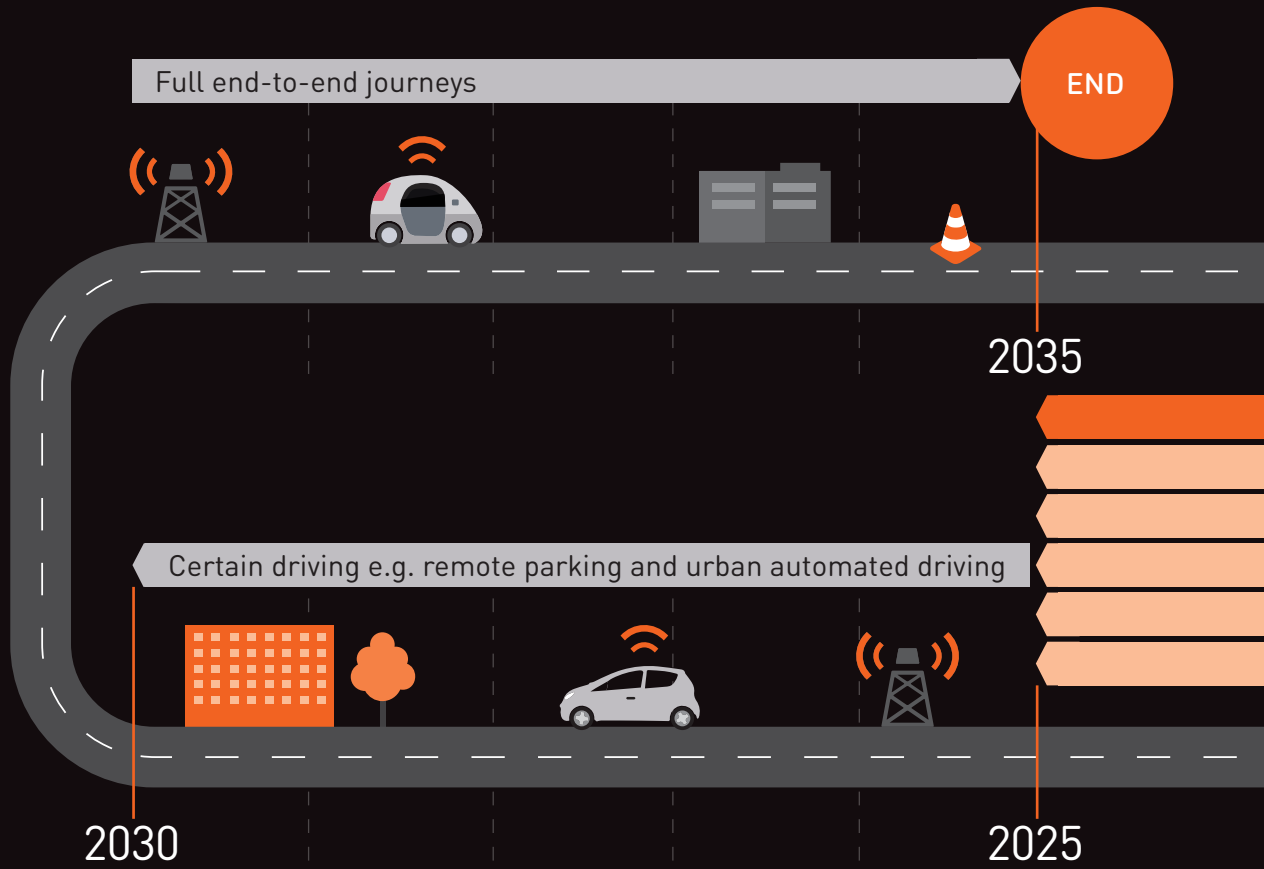
It may therefore be the case that younger motorists are adopting telematics policies in greater numbers not because the concept appeals to them, but because it is often the only way of obtaining affordable insurance.

In the March 2015 Budget, the coalition government announced £100 million of funding for research into driverless vehicle technology over the next five years.

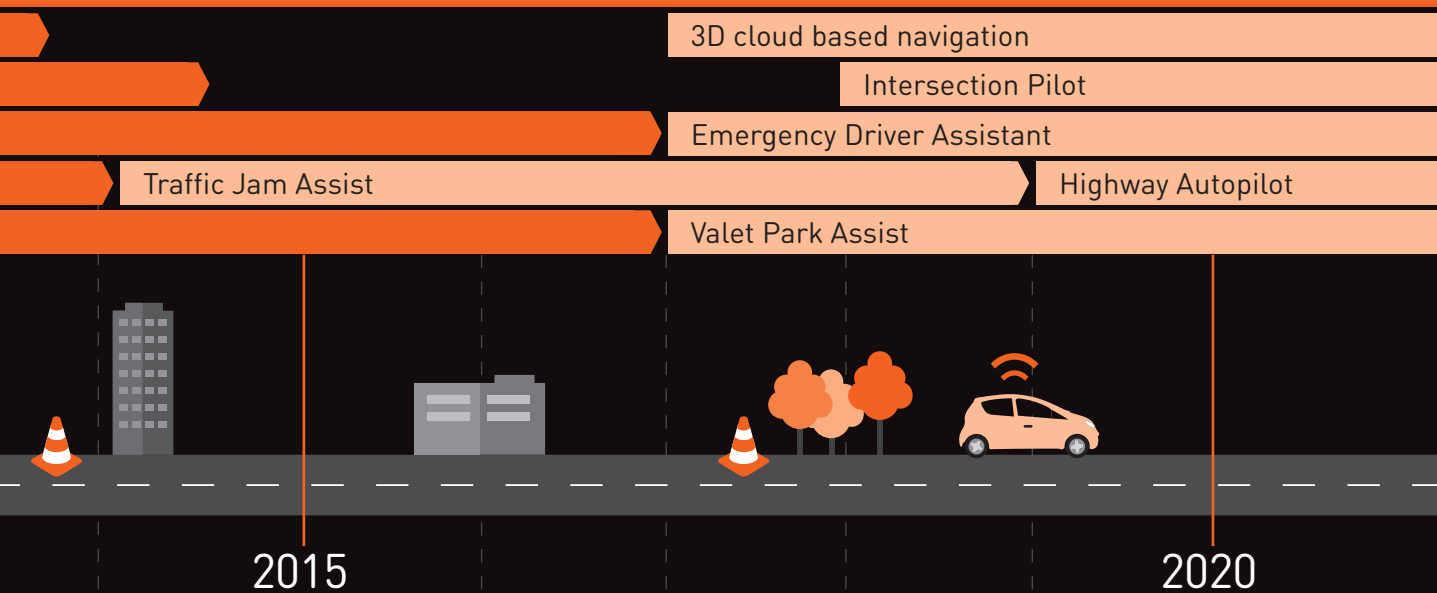
The Report on Motoring has found that a majority of motorists (52%) believe that driverless cars will benefit older and disabled drivers. But only a quarter (27%) expect driverless vehicles to make road travel safer than it is at present. Clearly, we are at a relatively early stage in the journey towards driverless cars and in future editions of the Report on Motoring it will be interesting to see how motorists' views have changed as their understanding of driverless cars develops.

Automated car timeline





and vehicle to infrastructure communication



6.0 The evolving car

6.3 Mixed messages on diesel

Around half of all new cars sold in the UK run on diesel. Figures published by the Society of Motor Manufacturers and Traders (SMMT) show that in the first half of 2015, diesels accounted for 48.3% of the market against 48.9% for petrol³⁵.

But there is growing awareness that the levels of nitrogen dioxide emitted by diesel cars manufactured over the past decade have been significantly higher than were predicted by the EU standard tests used to approve vehicle emissions. As a result, there has been a greater than forecasted impact on local air quality.

There is significant variation in the way that local authorities are dealing with air quality issues (see case study, on page 101), and the Report on Motoring found some support among motorists for measures designed to tackle such problems. More than half (54%) support the introduction of penalty charges for more polluting vehicles which enter their local area while 43% think that stronger action needs to be taken locally to reduce pollution (only 19% oppose such action). Views on penalties that specifically target diesel vehicles are more mixed: 39% say they back charges for diesel cars which do not comply with the latest emission standards but 34% are against them.



"Today's diesel engines are the cleanest ever, and the culmination of billions of pounds of investment by manufacturers to improve air quality.

Indiscriminate and inconsistent bans and parking taxes on diesel vehicles will undermine the take up of these newer, cleaner vehicles. We need to avoid penalising one vehicle technology over another and instead encourage the uptake of the latest low-emission vehicles which best suit consumers' needs."

Mike Hawes

Chief Executive

Society of Motor Manufacturers and Traders

35. www.smmt.co.uk/2015/07/record-half-year-for-uk-new-car-market/



48%

of all new cars sold in the
UK run on diesel

TDI
quattro

6.0 The evolving car

However, the RAC believes that the rapid introduction of severe penalties for owners of all diesel vehicles, is unjust. Many motorists have bought small fuel-efficient diesel vehicles over the last ten years because of their high fuel economy and low carbon dioxide emissions. The Government's taxation regime has incentivised this and it is therefore unfair to punish these people because the scientists and officials got the test cycles wrong.

Nevertheless, local action is required to deal with local air quality issues. These are best addressed through programmes like the London Ultra Low Emission Zone, which gives time for adjustment and targets the most polluting vehicles. The RAC recognises that decisions over local air quality are down to local authorities, but central government needs to show leadership by encouraging best practice and discouraging the demonising of diesel and the retroactive punishment of diesel owners.



"Because we are increasingly worried about air quality, we are on the verge of demonising the diesel engine – it feels like a simple solution."

But this is a complex issue, and this country is at the forefront of developing clean diesel technology – it would be a pity to find a knee-jerk reaction threw that international commercial advantage away."

Steve Gooding
Director
RAC Foundation

Local action to tackle air quality

Good practice:

London Ultra Low Emission Zone

From 2020, the area of central London currently covered by the Congestion Charging zone will become an Ultra Low Emission Zone (ULEZ). All cars, motorcycles, vans, minibuses and HGVs will need to meet specific exhaust emission standards or pay an additional daily charge to travel within the zone.

This scheme is an example of good practice in addressing local air quality issues because:

- It is confined to the area where air quality is the poorest
- It focuses early action on the worst-emitting vehicles
- It gives motorists time to adapt: it encourages motorists to move to lower-emitting vehicles rather than punishing them now for having bought a low carbon dioxide-emitting diesel vehicle³⁶

Bad practice:

London Borough of Islington residents' parking charges

In June 2015, Islington council in North London introduced a £96 annual surcharge on residents' parking permits for owners of diesel vehicles. The council said this was intended to 'protect residents from the health risks associated with diesel emissions'.

This is an example of bad practice in addressing local air quality issues because:

- The surcharge is being applied across the whole borough rather than solely in the areas where air quality is worst
- The measure was announced less than six months before it was introduced, giving motorists little opportunity to avoid it
- Residents with diesel vehicles can easily end up paying more than twice as much for parking as petrol owners, despite the fact they are likely to be producing lower carbon dioxide emissions and may in some cases use their vehicles very little
- It punishes owners of diesel vehicles who believed they were making a sound environmental choice by purchasing low carbon dioxide-emitting vehicles³⁷

36. tfl.gov.uk/modes/driving/ultra-low-emission-zone?intcmp=26434

37. www.islington.gov.uk/services/parking-roads/parking/parking_permits/Pages/resident_permit.aspx

7.0 RAC calls to action

Fuel



The cost of fuel remains a top concern for motorists despite the recent falls in pump prices. With overwhelming evidence of the link between fuel prices and economic growth, the RAC calls on the Chancellor to announce a freeze on fuel duty for the life of this Parliament.

Pricing aberrations are still common and the RAC calls on the Competition and Markets Authority to re-examine the fuel retail market.

The Strategic Road Network



The RAC welcomes the Road Investment Strategy and supports the introduction of more smart motorways. However, the RAC has concerns regarding the safety of the 'all-lanes-running' configuration of smart motorways and therefore calls on Highways England to monitor the safety performance closely where all-lanes running is in use and to consider reverting to the dynamic hard shoulder configuration for these and other sections planned for all-lanes running.

The RAC recognises major road users will suffer increased congestion and delays over the next five years as the network is upgraded. The RAC therefore calls on Highways England and other stakeholders to raise awareness and make the case that further delay in the short term is a price worth paying for a better network that can support economic growth and mobility in the 2020s.

Local roads



The state of local roads is motorists' top concern and top transport spending priority. Whilst acknowledging the desire to devolve responsibility wherever possible, the RAC calls on the Government to provide leadership and to ensure local authorities, and particularly revitalised city regions, have sufficient freedom to allocate expenditure in line with the priorities of council tax payers so local roads command the priority they deserve.

The RAC also calls on the Government to follow the recommendations of the Pothole Review to ensure funds are used for preventative maintenance rather than just short-term remedial repairs.

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

Speed limits



A majority of motorists want the limit on motorways raised from 70mph to 80mph and therefore the RAC would like to see a trial of 80mph, a government proposal in 2012 which was referred to again recently. The RAC therefore calls on the Government to clarify its position on a trial of an 80mph limit.

Most motorists support 20mph zones in residential areas and accident black spots. However, the RAC has concerns about 20mph on busy through routes where compliance is claimed to be poor. The RAC therefore calls on the Government to provide best practice guidance for local authorities on implementing 20mph limits.

Road safety



The year-on-year decline of road casualty numbers has faltered with accidents involving young drivers still disproportionately high. The RAC calls on the Government to tackle the problem with an open-minded approach that includes new technical solutions (e.g. telematics) and best practice from overseas (e.g. graduated licensing).

There is strong support for a drink-drive blood-alcohol limit of 50mg/100ml or less. The RAC therefore calls on the Government to reduce the limit in England and Wales to 50mg/100ml to bring it in line with Scotland and most EU countries.

Enforcement



Motorists concerns about the illegal behaviour of other drivers ranks highly, but there is little expectation that those who break the law will be caught by a police officer, no doubt due to the fact road traffic police numbers in England and Wales fell by 22.7% between 2010 and 2014.

The RAC therefore calls on the Government, police authorities and chief constables to halt the decline in traffic police numbers.

Air quality



The RAC acknowledges the need for local action to improve air quality but has serious concerns that some actions unreasonably penalise those who have bought small modern fuel-efficient diesel vehicles. The RAC recognises such decisions are the responsibility of local authorities, but calls on the Government to show leadership by encouraging best practice and discouraging the demonising of diesel and the punishment of owners of modern low carbon dioxide-emitting diesel vehicles.

8.0 Who is the motorist?

Miles per year*



0-1,000 miles	5%
1,001-3,000 miles	11%
3,001-6,000 miles	26%
6,001-9,000 miles	16%
9,001-12,000 miles	20%
12,001-15,000 miles	6%
15,001-18,000 miles	2%
18,001-21,000 miles	3%
>21,000 miles	5%

Average mileage (all motorists)



0 9 1 6 7

Miles

Number of cars per household



Households with one car	53%
Households with two cars	38%
Households with three cars	7%
Households with four cars	2%
Households with five or more cars	1%
Average number of cars in household	1.6
Average number of cars in ABC1 households	1.7
Average number of cars in rural households	1.7
Average number of cars in city household	1.4

Age of vehicles



Average age of vehicles in 2015	Between 3-4 years old
(average in 2014 was between 3-4 years old compared to 5.4 years in 2013)	
Motorists who own a car less than a year old	14%
Motorists who own a car between 5 and 10 years old	30%

*The remaining 6% responded by saying they do not know how many miles per year they complete

9.0 Appendix

9.1 Research methodology

The RAC Report on Motoring 2015 is based on a large-scale internet survey carried out by Quadrangle on behalf of the RAC.

In total, Quadrangle interviewed 1,555 British motorists (i.e. those who hold a current driving licence and drive at least once a month). The survey was conducted in the second half of May 2015, with the questionnaire taking around 25 minutes to complete.

The sample was nationally representative of age, gender, socio-economic groups, all UK regions, company car drivers and private car owners.

9.2 Statistical reliability

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

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



10.0 Company overview

Contacts

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

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

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

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

Advisory Panel

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

Chaired by David Bizley,
Chief Engineer, RAC

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

Quentin Willson, Motoring Journalist,
Broadcaster and FairFuelUK Campaigner

Stephen Joseph, Chief Executive,
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