



RAC Report on Motoring 2019

A driving need





RAC Report on Motoring Contents

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Foreword

Ben Collins

Stunt driver and best-selling author
formerly known as The Stig

I learned the basics of driving from the back seat, watching my parents. My father's style of driving at the helm of our Rover SD1 was breathtaking enough but it was the chain of cigarettes that left me light-headed. Nobody knew about the effects of second-hand smoke back then.

The latest menace is the ubiquitous mobile phone. You're enjoying your Sunday roast when an in-law, oblivious to your calls to pass the carrots, starts watching football, texting or posting drivel. Your mouth opens involuntarily: "what are you doing?"

All eyes swivel in your direction and your next remark guarantees that there won't be any more family lunches for a long time, at least not while you're in town.

We have evolved into the two camps of the frustrated and of the entitled. If we're honest, we probably spend some time in both camps. This year's RAC Report on Motoring identifies irresponsible and hazardous behaviour in other drivers as the primary concern among other motorists, with drivers using handheld phones topping the list of concerns.

If you can walk and chew gum at the same time then you can probably place a call via handsfree Bluetooth without crashing into a tree. So you send a text next time and there's still no tree to greet you... but chance is a numbers game.

Try timing yourself with a stopwatch and see how long it takes to select the app and type "home in 10 mins." In five seconds, and I defy to type faster, at just 40 miles per hour you travel the length of a football pitch with your eyes effectively closed. With more vehicles on the road than ever before, the consequences don't bear thinking about.

Despite the rise in traffic density over the years, public transport really hasn't kept up with demand, though its cost has skyrocketed. Frustration is finding its vent in the form of tailgating and aggressive behaviour while courtesy has taken a back seat.

Nearly half of drivers in this year's RAC Report on Motoring have witnessed verbal abuse on the roads in the past year, with nearly a third observing some kind of physical confrontation.

While from a public transport point of view HS2 dominates the headlines, a quiet revolution in common sense is seeing a resurgence in the local and rural rail routes that were closed in the 1960s.

That and the new national bus strategy should alleviate the woes of inching along in dense traffic while pumping fumes into urban areas.

It will also be a lifeline for urban communities who have become increasingly dependent on their cars as their only means of transport. Taken as a whole, over a third of drivers have become more, not less, dependent on their cars in the past year.

This year marks the moment that automotive technology stepped up to the mark to reduce emissions. Diesel NOx emissions have fallen 84% since 2000 and modern diesel engines filter out 99.9% of the worrisome particulate matter while producing 15% less carbon than petrol motors. The dawn of electric is upon us with nearly every car manufacturer unveiling their take on the car of the future.

But these cars won't drive themselves, and while there are giant leaps in technology taking place, it is the device in our pockets that continues to pose a real danger to more than just my Sunday lunch.

As ever the RAC Report on Motoring highlights the changing trends that affect every single one of us, because everyone is a road user in one sense or another. We are all in this together and there are nuggets of information in this report that will help you to improve your journey as well as those of others around you.



Executive summary

The annual RAC Report on Motoring provides vivid insight into the attitudes and opinions of the approximately 40 million drivers in the UK¹ on topics ranging from the state of the nation’s roads and fuel prices to taxation, the environment and motoring hazards.

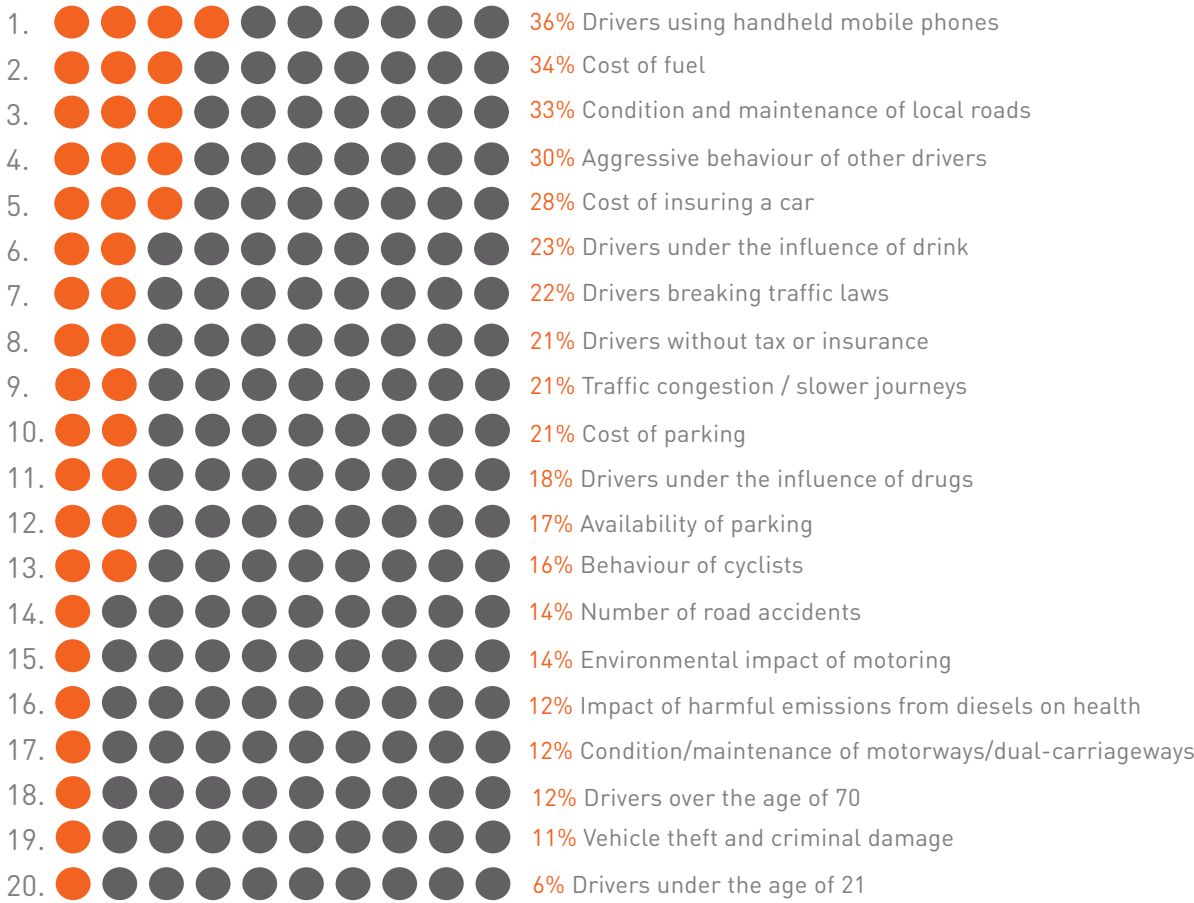
The research in the 2019 Report is based on in-depth interviews carried out with a fully-representative cross-section of 1,700 drivers around the country. These are some of its key findings.


Motorists are most concerned about the irresponsible and hazardous behaviour of other drivers

The single most widespread concern in 2019, cited by 36% of respondents, is other drivers using handheld mobile phones at the wheel. Nonetheless, nearly a quarter of motorists (24%) admit to using a handheld phone to make or receive calls while driving at least occasionally. The proportion of motorists who say other drivers’ aggressive behaviour is one of their four most serious concerns has increased from 26% to 30%.

And, almost a third (30%) report that they have personally witnessed physical abuse related to a driving incident in the past 12 months. Others driving under the influence of alcohol is a concern for 23% of the motoring population. But the same proportion (23%) say they usually consume at least one small alcoholic drink after driving to a social occasion. This year has also seen increases in the proportion of drivers who admit to breaking the speed limit on 30mph and 20mph roads.

What are drivers’ top motoring concerns?



36% 
are concerned about
other drivers’ mobile phone use

1. <https://data.gov.uk/dataset/d0be1ed2-9907-4ec4-b552-c048f6aec16a/gb-driving-licence-data>

Executive summary

The cost of motoring is a major issue for drivers in 2019

Rises in the price of petrol and diesel in the early months of this year mean that the cost of fuel is a chief concern for 34% of drivers, up from 29% in 2018. Two-thirds of motorists (67%) say their expenditure on fuel has risen since last year: in 2018, only 61% said this. There has also been an increase in recorded concern about the price of insurance premiums and the cost of parking, while more drivers say their maintenance and servicing expenses have risen – perhaps as a result of motorists holding on to their vehicles for longer.

Driving has become significantly more stressful over the past decade

Most motorists (66%) believe that driving is more stressful in 2019 than it was 10 years ago, with an increase in overall traffic and congestion the main reason. But many drivers also feel that other road users are less patient (76%) and less polite (63%), while 60% of motorists say they see more road-rage incidents today than they did a decade ago.

The state of the UK’s roads is not as pressing a concern as it was in 2018

Whether as a result of extra funding being made available to local authorities or more clement winter weather, fewer motorists this year say that the state of local roads is their top concern (down to 10% from 17% in 2018).

Nonetheless, almost half of UK drivers (49% – down from 66%) say the condition of their local roads has worsened in the past 12 months, with the issue felt most keenly in rural areas.

As well as potholes and surface problems, more motorists are complaining about poor signage visibility, lack of foliage maintenance and increased levels of litter – on both local and major roads – this year.

Most drivers (72%) support the Government’s plans to use all money collected from vehicle excise duty for the new National Roads Fund from next year.

The UK’s motorists are becoming steadily more dependent on their cars

This year, 35% of drivers say they have become more dependent on their vehicles in the last 12 months, the highest proportion in the Report’s last five years. Only 14% have become less dependent.

Meanwhile, most motorists (53%) say they are frustrated at the lack of feasible transport alternatives for long journeys (52% for short journeys).

A majority (57%) would be willing to use their cars less if public transport was improved with lower fares, more frequent services and better punctuality. Most drivers (73%) would find it very difficult to adjust to a life without a car, especially if they live in rural areas and villages (84%).

Concern about the impact of cars on the environment and on health has grown in recent years

The proportion of drivers who say the environmental impact of motoring is one of their main concerns has doubled to 14% over the past three years; concern about the impact of diesel emissions on health has also doubled, to 12%, over the same period. These concerns are on average higher among the under-25s.

But while a majority of motorists say they would be willing to take action to reduce their own emissions’ footprint, for example by car-sharing when commuting or by switching off their engine while waiting in traffic, the overall percentage saying this was lower than last year.

And, a smaller proportion of drivers (53% versus 58% in 2018) agree that changes should be made to the Vehicle Excise Duty system to encourage further take-up of ultra-low emission vehicles.

A close-up photograph of a hand holding a green fuel nozzle, which is inserted into the fuel tank of a white car. The car's side mirror is visible in the background. The image is partially obscured by a large orange diagonal shape on the left side, which contains the text.

1

Cost of motoring

Rising costs putting motorists under pressure

Higher petrol and diesel prices are putting a significant burden on UK drivers, research for the RAC Report on Motoring has found – but those are not the only rising costs motorists are experiencing. >

1 Cost of motoring

1.1 The cost of petrol and diesel
Our Report on Motoring 2019 shows that around one in every eight drivers – 12%, or the equivalent of 4.8 million people – say that their number-one motoring-related issue today is the cost of fuel. Only 8% said the same 12 months ago.

This surge in concern reflects the rises in global oil prices that were seen in the first few months of this year – and it may also be caused to some extent by the political and economic uncertainty currently facing the UK.

Overall, more than a third of motorists (34%) – or the equivalent of 13 million vehicle users – say that fuel prices are one of their top four concerns in 2019, up from 29% a year ago. This makes the cost of fuel now the second biggest overall concern to motorists.


More drivers this year report that their fuel bills have increased than in 2018: two-thirds (67%) report that the cost of filling up is higher this year, compared with 61% who said the same 12 months ago.

Only 5% of motorists say their bills had decreased – and they are more likely to be drivers of alternatively fuelled vehicles such as conventional hybrids or other low-emission vehicles (LEVs).

The Report identified significant regional differences in fuel price increases: while only 51% of London-based motorists said their petrol or diesel expenditure had risen in the past 12 months, the rate was 76% in Northern Ireland and 74% in the East of England.

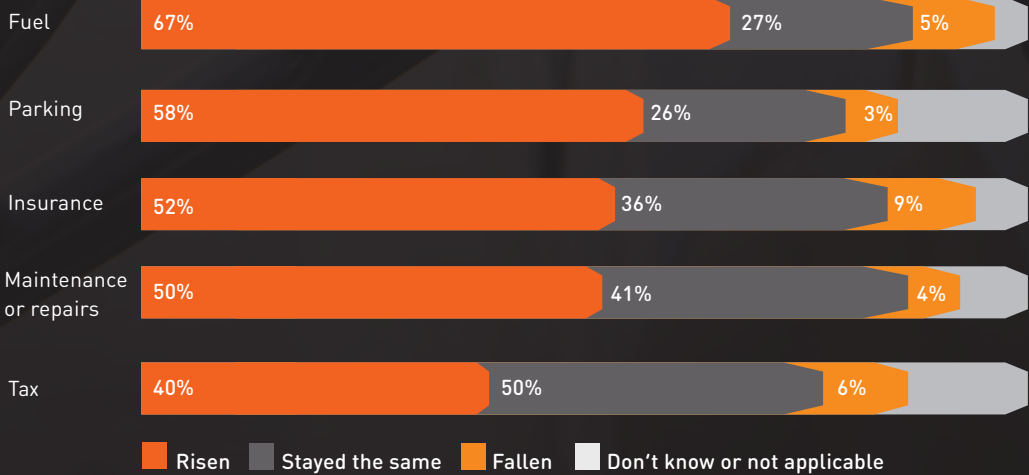
Concern about the cost of filling up is highest in villages and rural areas: here, one in five motorists (20%) say fuel prices are their top concern against just 8% in towns and cities, no doubt due to the increased need for using a car out in the countryside.

12%



say that their number-one motoring-related issue is the cost of fuel

How have drivers' costs changed over the last 12 months?



1 Cost of motoring

1.2 Insurance, parking and maintenance costs

But it's not just rising fuel prices that drivers are being affected by. At the same time, drivers are also worried about other motoring expenses. For example, 28% say the cost of insurance is a major concern this year – up from 25% in 2018. Figures published by the Association of British Insurers in April this year² suggest that premiums have started to fall from 2017's highs but these falls have recently stalled³ and policy prices remain significantly more expensive than in the earlier part of the decade.

Meanwhile, more than a fifth (21%, sharply higher than last year's 16%) say parking prices are a concern.

Almost six in 10 motorists (58%) say that general parking charges are up this year, while there has been an increase in the number of drivers who now face paying for residential parking permits: a majority of all motorists (56%) now have to pay for such permits, significantly up from 41% in 2018.

The cost of these permits is considerably more likely to have risen in London, where 35% of drivers say they are paying extra in 2019 against 18% in the UK as a whole. This has possibly been driven by higher permit charges for diesel vehicles which a number of London boroughs have introduced.

21% 

more than a fifth of drivers (sharply higher than last year's 16%) say parking prices are a concern.

The cost of repairing and maintaining cars is also a growing problem for motorists: 50% of drivers report that their servicing bills have risen over the past year against 45% who said the same in 2018. This may reflect the fact not only that vehicles are becoming increasingly complex, but also that current economic conditions mean that motorists are holding on to their cars for longer before replacing them with newer models, which raises the risk of having to meet the costs of age-related repairs, especially when vehicles leave their manufacturer warranty period and owners have to start paying for repairs out of their own pockets.

This year's report found an increase in the age of the average vehicle from 5.1 years in 2018 to 5.5 years in 2019 – a change that is borne out by figures published by the Society of Motor Manufacturers and Traders (SMMT) in June, which showed that private registrations of new vehicles were down 3.2% in the first six months of 2019.



“ As vehicles become more and more technologically complex, it is perhaps not surprising that the cost of maintaining and repairing them is increasing. And the fact that motorists are holding on to their cars for longer will also inevitably result in higher maintenance costs.”

Phil Ryan, Managing Director, Business Roadside, RAC

2. <https://www.abi.org.uk/news/news-articles/2019/04/downhill-drive--large-quarterly-drop-sees-the-cost-of-motor-insurance-fall-to-a-two-year-low/>

3. <https://www.abi.org.uk/news/news-articles/2019/07/fall-in-the-cost-of-motor-insurance-stalls-as-the-abi-warns-of-a-bumpy-road-ahead-for-motorists/>

2

The state of our roads

Are things getting better?

The equivalent of nearly 20 million British drivers think the condition and maintenance of the roads they use every day has got even worse over the past 12 months, the Report has found. >

2 The state of our roads

The 2019 Report on Motoring shows that 49% of drivers say the condition of local roads – that is all roads that are not motorways or major A-roads – have deteriorated since last year, primarily as a result of potholes and other road-surface problems. Meanwhile only 11% believe the roads in their area have improved.

But while the picture is certainly gloomy, there are some indications that this issue is not as bad as it has been in recent years. In 2018, for example, the condition of local roads was the top overall motoring-related concern for a staggering 17% of drivers – equating to roughly 6.8 million people – outstripping issues such as handheld mobile phone use, drink-driving and the cost of fuel. This year, however, that proportion has dropped to 10%.

There has also been a notable fall in the percentage of motorists who think local roads have got worse – in 2018, the proportion was 66% compared with this year’s 49%.

These figures chime with the RAC’s recent Pothole Index⁴ findings: these show that RAC patrols attended fewer pothole-related breakdowns in the first three months of 2019 than in any first quarter for three years, and also that in the 12 months to June this year, there were fewer such breakdowns than in any period since 2007.

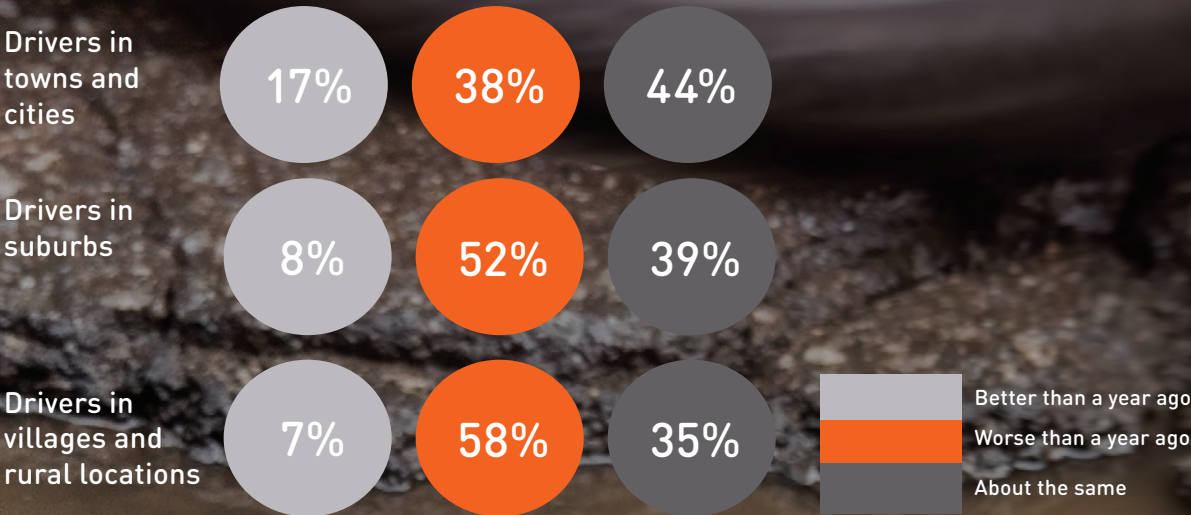
The most recent edition of the annual survey carried out by the Asphalt Industry Alliance (AIA) echoes the Report on Motoring’s findings to some extent: the AIA’s 2019 Annual Local Authority Road Maintenance (ALARM) report⁵, which was published in March, indicated that an increase in local authority funding was to some extent “stemming the decline” in the condition of England’s local roads.



4. <https://www.rac.co.uk/potholeindex>
5. <https://www.asphaltuk.org/alarm-survey-page>

How has the state of local roads changed compared to a year ago?

% of drivers who feel they are better, worse or about the same



“After a relatively mild winter it is no surprise that pothole problems are easing in comparison with last year – and that pothole repairs made in recent months are holding up.”

Steve Gooding, Director
RAC Foundation

2 The state of our roads

2.1 Not just potholes

Potholes and related road-surface problems take most of the blame for worsening conditions. But these are not drivers' sole concerns. There has been a sharp rise in dissatisfaction about grass and foliage maintenance on local roadsides, with 22% of drivers saying this is one reason conditions are worse.

At the same time, there has been a doubling in the proportion of motorists who say signage visibility on local roads has deteriorated, from 8% to 17%. It is quite possible that the two issues are linked, with substandard foliage maintenance leading to an increase in signs being obscured by vegetation.

Our research has also identified a growing sense of resentment among motorists, most of whom pay hundreds of pounds annually in motoring taxes but who are forced to endure such poor conditions.

More than eight in 10 drivers – 83%, or the equivalent of 31 million people – say that the quality of roads should be better given the amount of tax they hand over to the Government every year.

Almost as many drivers (77%) favour having at least a chunk of their motoring taxes ring-fenced to fund local road maintenance. In July 2019, the Parliamentary Transport Committee published a report calling for long-term funding solutions to enable local authorities to better maintain roads under their control⁶. The RAC has welcomed this report⁷, and urged the Government to develop a five-year investment plan for local roads.

And there appears to be a clear town-versus-country divide in terms of road maintenance: drivers based in rural locations are almost 10% more likely to say their local road conditions have worsened in the past 12 months. Meanwhile, 25% of London-based motorists say conditions are in fact better this year, against the UK-wide average of 11%.

83% 

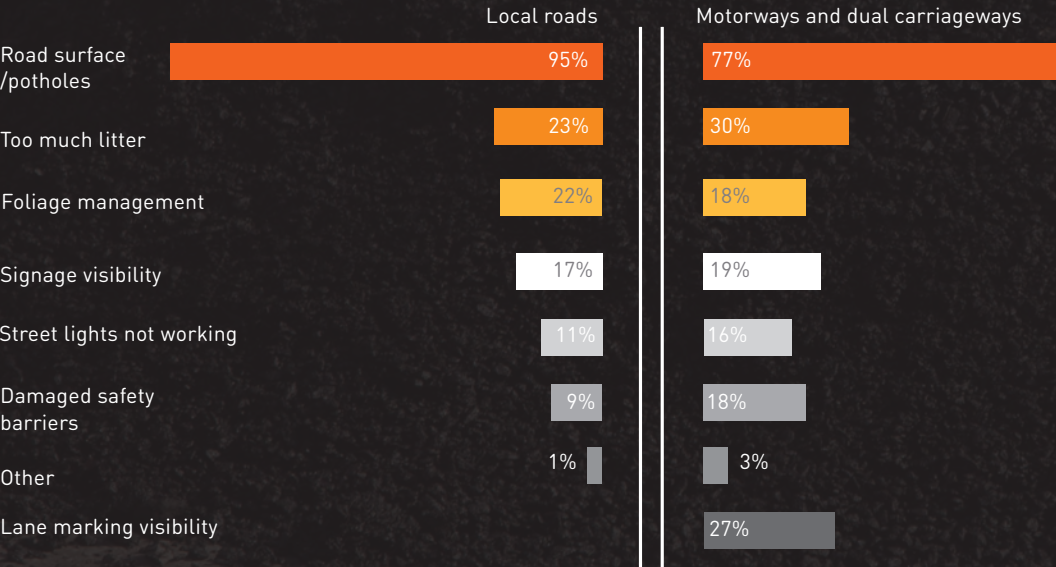
say that the quality of roads should be better given the amount of tax they hand over to the Government every year

6. <https://www.parliament.uk/business/committees/committees-a-z/commons-select/transport-committee/news-parliament-2017/local-roads-funding-governance-report-published-17-19/>
7. <https://media.rac.co.uk/news/local-roads-funding-report-by-the-transport-committee-rac-statement-374610>



How has the condition of UK roads worsened?

The reasons given by drivers who feel the condition of roads has worsened



2 The state of our roads

2.2 Motorways and major roads: a better picture?

Drivers' views on motorway and major dual-carriageway conditions are somewhat brighter than on local roads, but there is still considerable room for improvement. Well over twice as many motorists – 28% – think the conditions here have worsened over the past 12 months as think they have improved (11%).

But this is less damning a verdict than in 2018, when 40% of drivers said the state of major roads had deteriorated. Unfortunately, though, this year there has been a sharp increase in the number of motorists bemoaning the amount of litter by the side of major roads: 30% of those drivers who said motorway and A-road conditions had worsened blamed litter, up from 25% last year.

Finally, there is widespread support among motorists for the Government's plans to use all money collected from Vehicle Excise Duty for the new National Roads Fund: 72% think this is a good idea. From 2020-21, vehicle excise duty receipts will be ringfenced for use on strategic and major routes to both increase capacity on the network to future-proof anticipated increased traffic volumes. The strategic road network presently carries around a third of all traffic while making up just 2% of all roads⁸.



“The focus on improving the surface of our roads is to be welcomed but is there the possibility that the likes of Highways England are focusing on them a little too much at the detriment of other things? Motorists have major concerns over things like litter and signage visibility which get little attention.”

Graeme Paton, Transport Correspondent
The Times

8. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/808555/road-traffic-estimates-in-great-britain-2018.pdf



28% 

think that conditions on motorways and dual carriageways have worsened versus 11% of motorists that believe they have improved. Meanwhile 55% believe conditions have remained the same

A close-up photograph of a hand holding a black and yellow high-visibility motorcycle glove. A white marker pen is resting on the back of the glove. The background is dark and out of focus.

3

Menaces on our roads

UK drivers say they are fearful of the dangers posed by other motorists, this year's RAC Report on Motoring has found. >

3 Menaces on our roads

The menaces on Britain's roads – ranging from tailgating and texting at the wheel to drink-driving and road rage – have never been greater than they are today, our research suggests. The equivalent of more than 14 million car owners (36%) say in our 2019 survey that their top motoring-related concern is some form of illegal, anti-social or dangerous behaviour on the part of other drivers – behaviour that has the potential to put the lives of all other road users at serious risk.

3.1 Aggression on the rise

Perhaps the most shocking evidence of the menace on our roads is the fact that three in every 10 motorists (30%) say they have personally witnessed some form of physical abuse related to a driving incident in the past 12 months. Almost half – the equivalent of around 20 million drivers – report that they have seen verbal abuse dished out to another motorist this year.

Meanwhile, there is a widespread feeling among drivers that standards of behaviour on our roads have deteriorated significantly over the course of the last decade: 76% of drivers believe that motorists are less patient today than they were in 2009, while 60% say they witness a greater number of road-rage incidents than they did 10 years ago.

It is hardly surprising, then, that the proportion of motorists who say that their single biggest fear is the aggressive behaviour of other drivers has doubled – from 4% to 8% – over the past 12 months.

To put this into context, more drivers are worried about road rage, tailgating and excessive speeding than they are about congestion, for example, or the rising cost of insurance.

30% 

of motorists say they have personally witnessed some form of physical abuse related to a driving incident in the past 12 months



3 Menaces on our roads

3.2 Phone use: a distraction danger

While aggression at the wheel poses significant levels of danger, the use of mobile phones by other drivers can be just as life-threatening – if not more so.

Over recent years, a spotlight has been shone on the scourge of handheld mobile phone usage – not just to make and receive calls, but also to compose and read messages, and even to take pictures and record videos. And this year’s Report on Motoring has found that this is the most commonly cited concern: 12% of drivers, or the equivalent of around five million people – say it is their biggest worry.



of under-25s – say they check texts, email or social media while driving



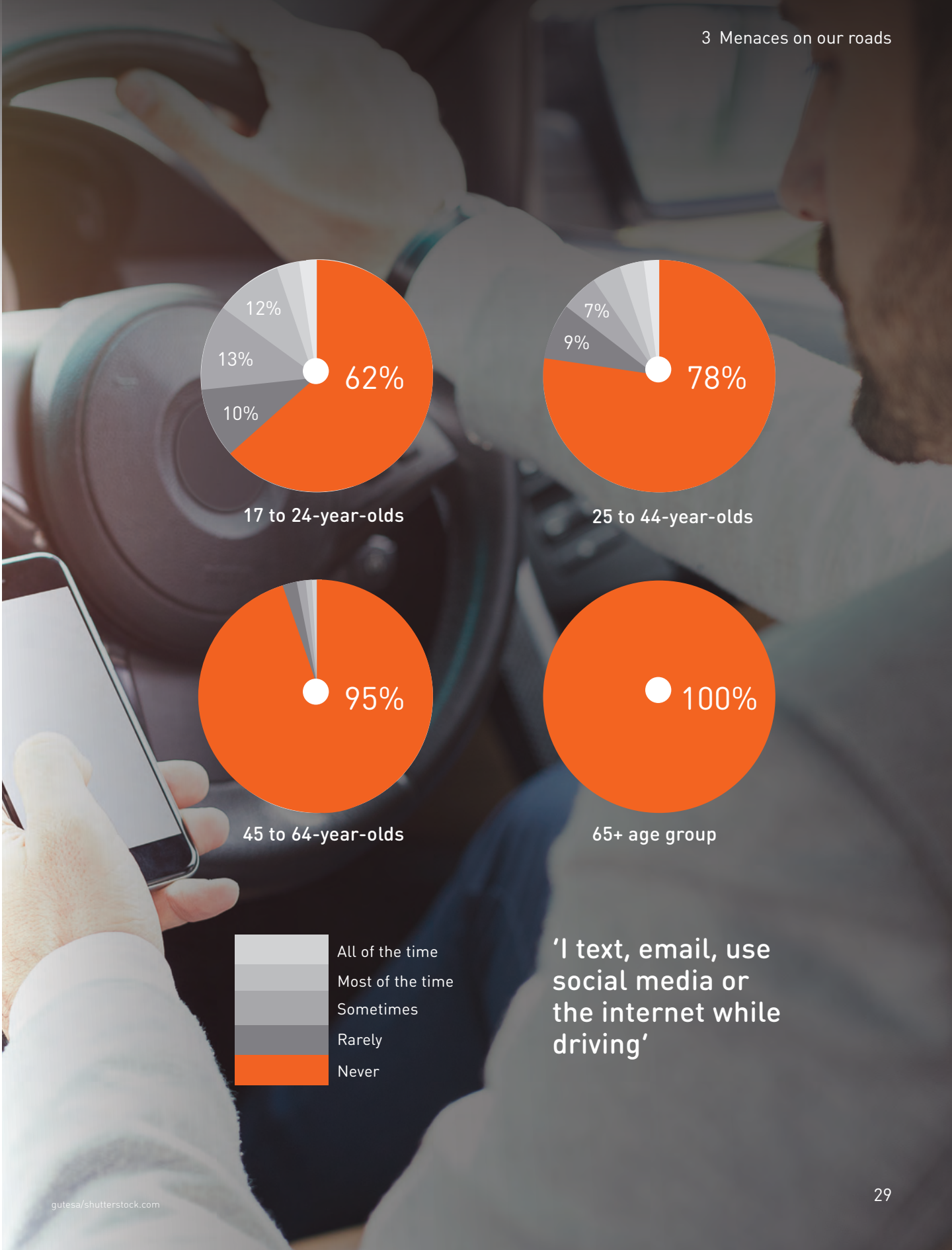
“Current legislation focuses on handheld mobile phones, but the fact is that hands-free mobile use can be almost as bad. People think that because they are obeying the law by using a hands-free kit, they are safe and aren’t being distracted – but that’s not the case.”

Mike Quinton, Chief Executive, IAM Roadsmart

Staggeringly, however, our research also shows that there remains a significant hardcore of motorists who admit to using their phones without hands-free kits while at the wheel, seemingly oblivious or indifferent to the dangers they pose to themselves and their passengers, not to mention other road users.

Almost a quarter of all drivers – the equivalent of just under 10 million motorists (23%) – confess that they make or receive calls on a handheld phone while they are driving at least occasionally. Among drivers aged between 17 and 24, this rate is 51%.

Meanwhile, 17% of all drivers – and a shocking 35% of under-25s – say they check texts, email or social media while driving, despite the heightened level of risk involved in looking away from the road for seconds at a time.

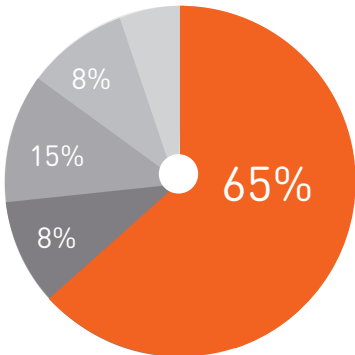


3 Menaces on our roads

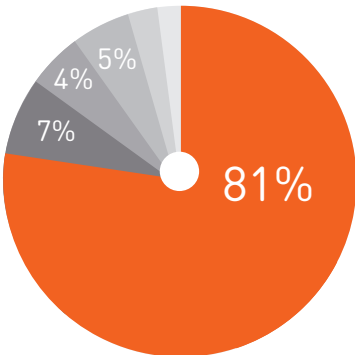
The risk of being distracted by an incoming call or other form of notification appears to be worryingly high for many motorists. Only a small minority of drivers (15%) follow the official government advice to put their phone in their glove compartment while driving: most people either keep their phone in a pocket or bag (45%) or put it on the seat or console next to them (25%).

A quarter (24%) of motorists say they usually leave their phones switched on with the sound on when driving, rather than putting the device on silent or switching to some form of safe-driving mode.

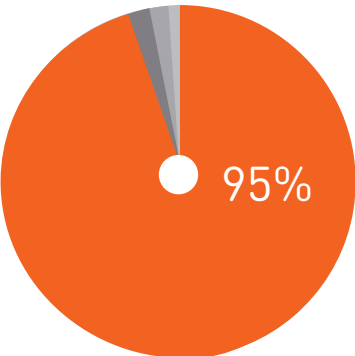
'I take photos - including selfies - or record videos while driving'



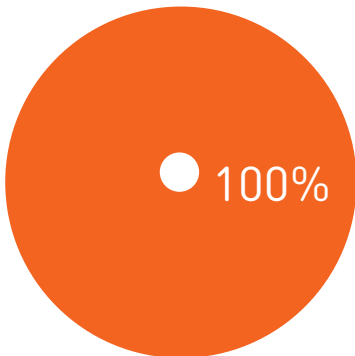
17 to 24-year-olds



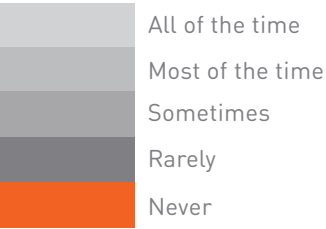
25 to 44-year-olds



45 to 64-year-olds



65+ age group



“It would be interesting to see motorists’ views on the kind of mobile phone use they are most concerned about – for example, it may be that there is a greater level of worry about drivers using handheld phones at high speeds on the motorway.”

Matthew Avery, Director of Insurance Research, Thatcham Research






3 Menaces on our roads

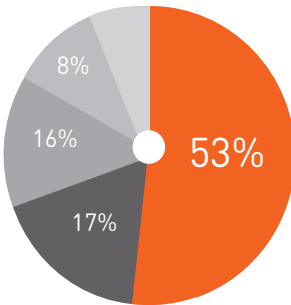
3.3 Under the influence

A further threat to the lives of UK road users is drink- and drug-driving. The equivalent of almost four million motorists (10%) say that their biggest concern in 2019 is other road users under the influence either of alcohol or drugs. But again, a significant number of people appear happy to take the risk of driving with alcohol in their systems. Some 19% of motorists – equating to more than seven million individuals – admit they have probably driven while over the drink-drive limit in the past 12 months, either shortly after having a drink, or the morning after drinking.

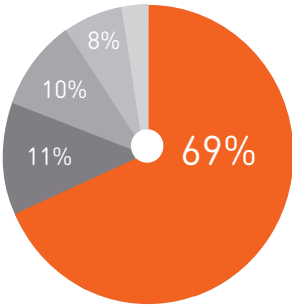
This proportion rises to just under half (44%) of motorists aged under 25, and 27% of those aged between 25 and 44. Almost a quarter of the motoring public – which would roughly equate to over nine million drivers (23%) – say that they normally consume at least once small alcoholic drink whenever they drive with friends or family members to a social occasion.

Proportion of drivers who have driven while over the drink-drive limit over the last 12 months

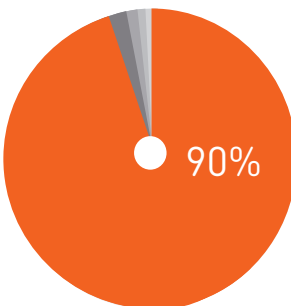
-  I know I've driven when over the limit the following morning after a night out
-  I think I've driven when over the limit shortly after having a drink(s)
-  I know I've driven when over the limit shortly after having a drink(s)
-  I think I've driven when over the limit the following morning after a night out
-  No, I don't think I've driven



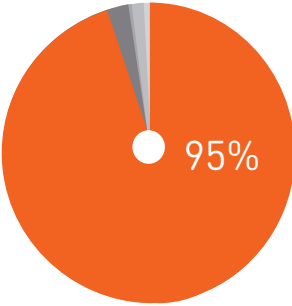
17 to 24-year-olds



25 to 44-year-olds



45 to 64-year-olds



65+ age group



“Unfortunately, the numbers of police officers actively engaged in roads policing activities are now significantly reduced, and despite positive noises from the new Prime Minister on loosening fiscal strictures and recruiting more officers, this specialist area will not see real benefits for some time. Until there are technological enforcement options available I don’t believe that this area will be targeted effectively.”

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

19% 

of motorists - equating to more than seven million individuals – admit they have probably driven while over the drink-drive limit in the past 12 months

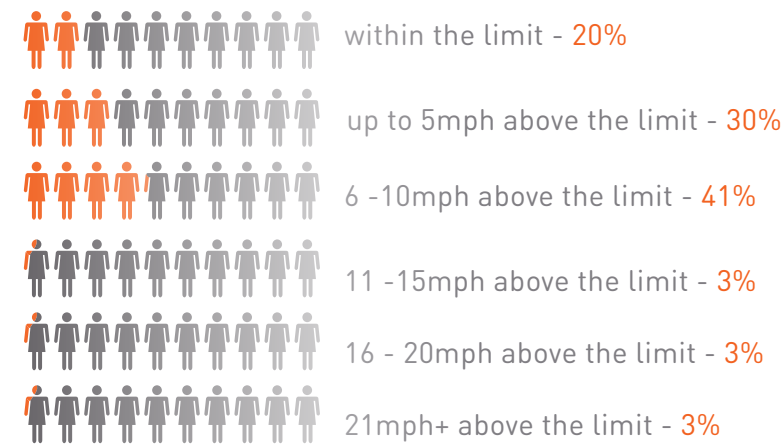
3 Menaces on our roads

3.4 Testing the limits

A high number of motorists also admit to another form of potentially dangerous lawbreaking – namely, speeding. More than half of all drivers (55% – the equivalent of around 22 million motorists) say they exceed the 70mph motorway limit either occasionally or frequently – although this proportion has fallen steadily over the past five years.

But increasing numbers of drivers admit to breaking 30mph and 20mph limits on a regular basis: this year the proportion in both cases is 44%, well up on the 39% (for 30mph urban roads) and 36% (for 20mph urban area zones) recorded in 2018. A third (33%) of drivers who regularly break 20mph limits justify their actions by saying that the limit is “inappropriate” for the roads it has been applied to.

What’s the fastest UK motorists have driven on 20mph roads?



“When authorities decide to cover a large area with a blanket 20mph limit, it is probably more likely to be seen as inappropriate by drivers – and the research seems to support that.”

Theo de Pencier, Non-executive board member, Transport Focus; Former Chief Executive Officer, Freight Transport Association



4

Car dependency

A headache for policymakers?

British drivers are becoming even more reliant on their cars as their main mode of transport. Research for the 2019 Report on Motoring has identified a trend towards growing car dependency in the UK – at a time when the Government and local authorities are keen for drivers to use their cars less. >

4 Car dependency

This year, the equivalent of 14 million motorists (35%) say they have become more dependent on their vehicles in the last 12 months – up from 33% in 2018 and the highest proportion in the past five years. Only 14% of drivers (around 5 million people) say they have become less dependent this year.

4.1 Public transport an inadequate alternative

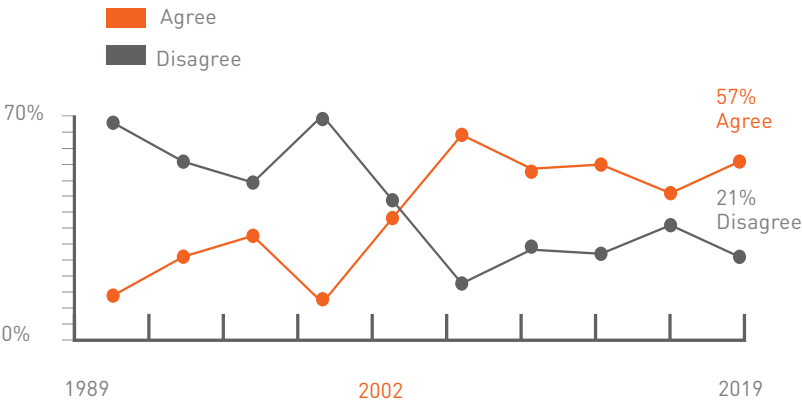
The Government is keen to encourage drivers to use their vehicles less – not only to ease the pressure on the UK’s road network, but also to help the country meet its greenhouse-gas emissions targets and reduce the impact of diesel emissions on air quality.

But a significant number of drivers feel they have little choice but to rely on their cars given the lack of other viable options: more than half (53%) of the UK’s near 40 million motorists⁹ say they are frustrated by the lack of feasible alternative modes of transport for long journeys, while a similar proportion (52%) say the same about short journeys.

A majority of drivers – 57%, the equivalent of almost 23 million people – would be willing to use their cars less if the quality of public transport was better, and agreement with this statement has been high for 11 consecutive years now.

UK drivers who agree or disagree with the statement: ‘I would use my car less if public transport were better’

Opinion shifted after 2002 and has remained that way ever since



“These statistics on dependency confirm that our cars are still hugely important – a fact that policymakers can sometimes lose sight of when they look through the lens of urban – and especially London – transport options. A great number of people do not have reliable public transport as an alternative.”

Mike Hawes, Chief Executive,
Society of Motor Manufacturers and Traders



9. <https://data.gov.uk/dataset/d0be1ed2-9907-4ec4-b552-c048f6aec16a/gb-driving-licence-data>

4 Car dependency

Among this group of motorists, 50% complain that fares are too high – up by five percentage points on last year – while 41% say services are not frequent enough. Meanwhile, a growing number of people (36% – up from 31% in 2018) say that a lack of punctuality is a significant barrier to them using public transport as an alternative to driving, and 38% say services don’t run where they need them to.

So it is clear that many drivers continue to believe that public transport does not suit their needs for the sorts of journeys they have to make.

Of those who would be willing to consider using public transport if services were better, almost a third (31%) say they would make more use of it if there was greater availability of services – a figure that rises to 40% for rural motorists, reflecting to some extent the significant cuts that have been made to rural bus services in recent years.¹⁰

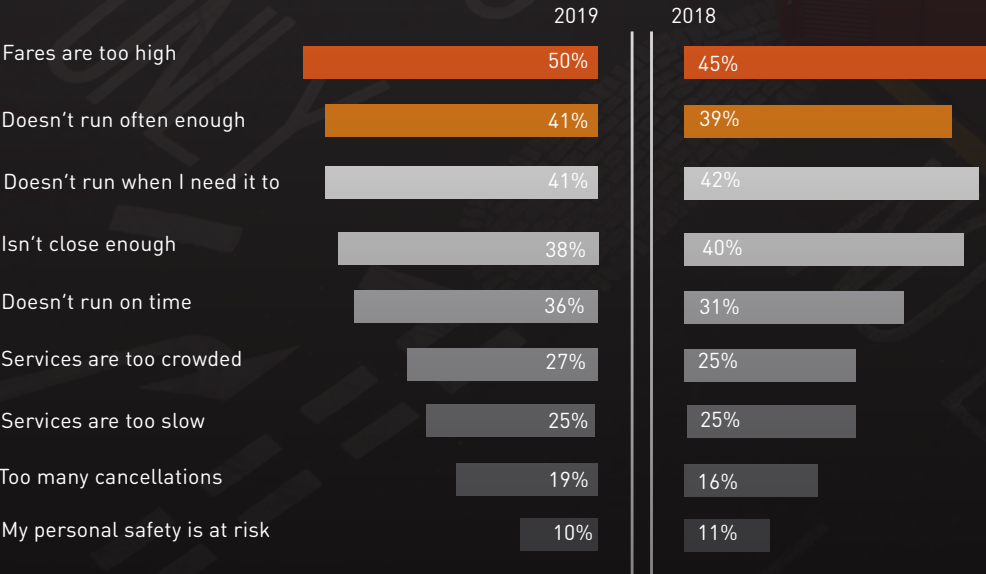
In May, the Parliamentary Transport Committee published a report¹¹ which called for the introduction of a national bus strategy to address the paucity of services available outside of London, where bus provision is regulated by Transport for London. The committee said that more than 3,000 bus routes had been reduced, withdrawn or altered since 2010-11.

35% 

say they have become more dependent on their vehicles in the last 12 months – up from 33% in 2018 and the highest proportion in the past five years

Why don’t drivers use public transport more?

Based on drivers who said they would use their car less if public transport was better



10. <https://bettertransport.org.uk/sites/default/files/research-files/19.04.12.bic-2018.pdf>
11. <https://publications.parliament.uk/pa/cm201719/cmselect/cmtrans/1425/1425.pdf>

4 Car dependency

4.2 Regional differences

The Report has found that motorists who live in London are far more likely to use alternatives to their cars for many journeys: in the capital, on average 38% of each driver’s weekly journeys are made either by public transport, walking or cycling compared with a national average of 24%.

For those who live in villages or other rural areas, cars typically account for 85% of all journeys, with just 15% represented by public transport, cycling or walking.

Across the UK as a whole, an overwhelming majority of motorists (73%) say they would find it very difficult to adjust to life without a car – and more than half (54%) of this group say this is because their vehicle is essential to carry heavy items.

London residents would find it easier to live without a car: only 58% say they would struggle to adjust, compared with 84% of rural and village-based motorists.

To what extent are drivers willing to cut back their vehicle use for environmental reasons? We explore this question in more detail in the next section.



of drivers weekly journeys in the capital are made either by public transport, walking or cycling



“ It would be very interesting to compare the levels of car dependency in London – where there are a number of realistic alternatives to car use – to those in the rest of the UK, and even in other major cities.”

David Davies, Executive Director, PACTS



5

Impact of motoring on the environment

Are drivers willing to act?

The RAC Report on Motoring has shown that, over the years, issues relating to the environment have steadily become more important to drivers. >

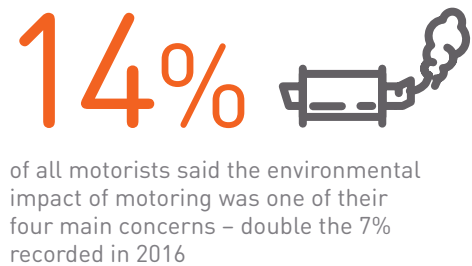
5 Environmental impact of motoring

In 2019,14% of all motorists said the environmental impact of motoring was one of their four main concerns – double the 7% recorded in 2016. And, concern about the impact of harmful diesel emissions on health has also doubled over the past three years, from 6% to 12% of drivers, which doubtless coincides with the rise in public awareness around the issue.

But the bad news for policymakers is that this year’s Report has recorded a fall in the public’s willingness to take action to reduce their own personal vehicle emissions’ footprint – although there are significant differences among different groups of drivers. For example, while more than two-thirds (67%) of motorists last year said they would be willing to switch off their engines while in traffic for environmental reasons, the proportion has fallen to 61% in 2019.

Fewer people this year are interested in understanding how their vehicle’s emissions affect air quality (down to 55% from 64%), or are willing to share a car with a friend or colleague in order to cut emissions (down to 43% from 51%).

And, only 39% of drivers would consider walking or cycling a short journey for environmental reasons instead of using their cars – a sharp fall on the 49% recorded in 2018. It is possible that some of these findings could be explained by the fact that drivers are increasingly reliant on using a car, as other data from this year’s research shows.



Concern about the environmental impact of motoring:



5 Environmental impact of motoring

5.1 Differences among drivers

This year's Report demonstrates differences between various sections of the population when it comes to the environment. Concern relating to the environmental impact of motoring, for example, is highest among under-25s – 16% say this is one of their four main concerns against 12% of drivers aged between 45 and 64.

Age differences relating to concern about the health impact of diesel emissions are even starker: 20% of under-25s cite this as a top-four concern against just 11% of over-65s.

This trend also applies to the type of action motorists are willing to take to reduce their emissions' footprint.

Drivers under the age of 25 are more likely to consider car-sharing (53% against an average of 43%), or replacing a short car journey by walking or cycling (45% versus 39%). And, more than a fifth (22%) of younger drivers would consider giving up their cars altogether in order to cut their environmental impact.

Among the over-65s, this rate is just 7% – and 6% for motorists in villages and rural areas, which reflects the fact that they are particularly reliant on their vehicles due to a lack of alternative transport options.



“It is important to look at the environmental views of different demographics and communities rather than analysing them as a homogeneous group: only by doing so can we formulate policies that will be effective.”

Gemma Brand, Head of Statistics,
Road and Freight, Department for Transport



5 Environmental impact of motoring

5.2 Buying the right car for the environment

Purchasing or leasing a vehicle can be costly and is often the second most expensive item a person will spend money on after a house. Consumers look at many aspects of what appeals to them when making their buying decision, but what type of car to opt for can often be a confusing process, especially given concerns about the environment and the introduction of Clean Air Zones in many cities.

This year’s Report on Motoring found that petrol cars are the likely next-vehicle option for 48% of drivers, down from 52% in 2018 but still the most popular choice.

A number of recent controversies over diesel manufacturers and the health impact of diesel emissions have seen these cars fall sharply in popularity: this year, only 15% of motorists say they will buy a diesel next, down from 18% in 2018 and 28% as recently as 2016.

Recent years have seen a steady increase on the part of drivers to consider a conventional hybrid as their next vehicle purchase: the rate has risen to 21% this year from 17% in 2018.

In 2019, 7% of drivers say they plan to buy a plug-in hybrid as their next car, the same proportion as recorded in 2018.

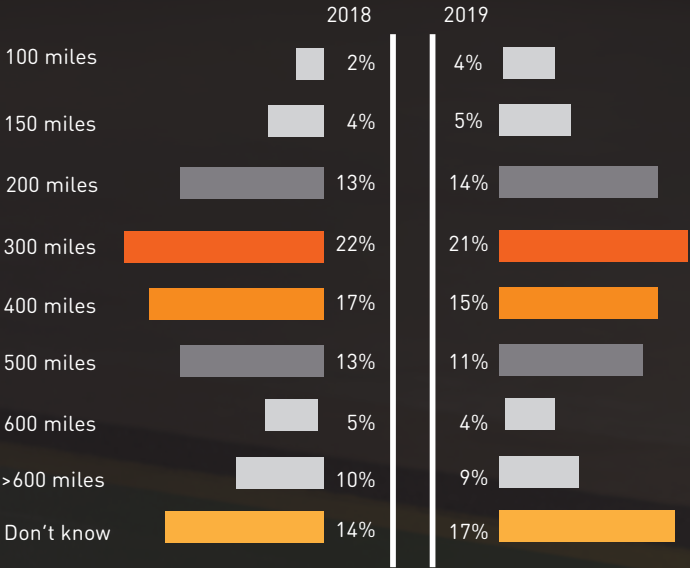
While pure electric cars remain a minority option, there has in the past 12 months been a notable increase – from 3% to 6% – in the proportion of drivers who say they intend to buy such a vehicle next.

Drivers would like an average range of 375 miles before purchasing an EV



What would-be buyers of battery electric vehicles want the minimum range to be?

Based on drivers who don’t currently run a battery electric vehicle



5 Environmental impact of motoring

RAC Advice

Petrol vehicle – modern petrol cars emit lower levels of harmful nitrogen oxide emissions than diesels. This can make them a more appealing choice for shorter, urban journeys while also a reliable, if less fuel-efficient choice, for longer motorway journeys.

Would-be buyers of petrol vehicles should ask whether the vehicle is 'Clean Air Zone' (Ultra Low Emission Zone, or ULEZ, in London) compliant, though most petrols registered after September 2005 are currently not likely to be subject to charges.

This year's Report on Motoring found that petrol cars are the likely next-vehicle option for 48% of drivers, down from 52% in 2018 but still the most popular choice.

Diesel vehicle – modern diesel cars are renowned for their fuel efficiency on longer journeys, especially those on motorways and major A-roads where average speeds are far higher. Drivers that typically do these sorts of journeys, can save on fuel costs throughout the year with a diesel.

However, diesel engines tend to operate less efficiently on urban roads and emit higher levels of harmful nitrogen oxide pollution.

Many modern diesels have soot-reducing diesel particulate filters, which often require journeys on faster roads to help 'burn off' soot that can accumulate in the filter. Would-be buyers of diesels should also ask if their vehicle is 'Clean Air Zone' (ULEZ in London) standard compliant.

A number of recent controversies over diesel manufacturers and the health impact of diesel emissions have seen these cars fall sharply in popularity: this year, only 15% of motorists say they will buy a diesel next, down from 18% in 2018 and 28% as recently as 2016.

Conventional hybrid (battery assisted) – This type of vehicle is often the choice of private hire companies because of low urban running costs and no requirement to plug-in. These cars tend to be lower emitting because, in addition to a petrol or diesel engine, they can be powered at low speeds by a battery. These often carry lower annual tax but overall are higher emitting than many plug-in models on the market.

Recent years have seen a steady increase on the part of drivers to consider a conventional hybrid as their next vehicle purchase: the rate has risen to 21% this year from 17% in 2018.

Plug-in hybrid electric – Plug-in hybrid electric cars give those who predominantly drive in urban areas the opportunity to drive on a charged battery alone (in effect be 'zero emissions capable') while also being safe in the knowledge that should they need their vehicle for longer journeys, the internal combustion engine will kick in and allay any concerns about the vehicle's range.

It's important to note these cars tend to have smaller fuel tanks.

In 2019, 7% of drivers say they plan to buy a plug-in hybrid as their next car, the same proportion as recorded in 2018.

Pure battery electric vehicles – Though these types of cars often carry a higher initial price when compared to their conventional equivalents, they are cheaper to run, carry no tax costs and are quiet and clean, which is perfect for the city driver. Research for the 2019 RAC Report on Motoring shows drivers would like an average range of 375 miles before purchasing an EV, and the reality is most EVs do not have that level of battery range yet. For longer journeys, EV owners will probably need to charge their vehicles at a service area during their journeys.

While pure electric cars remain a minority option, there has in the past 12 months been a notable increase – from 3% to 6% – in the proportion of drivers who say they intend to buy such a vehicle next.

6

Driving into the future

Britain's drivers are showing some signs they are starting to embrace the new breed of low- and zero-emission electric vehicles being developed by manufacturers, research for the Report on Motoring has found. >



6 Driving into the future

This year's Report on Motoring also shows there is some support among drivers for possible changes to be introduced to the tax system to reflect the growing uptake of electric cars – as well as to help tackle congestion. Motorists, however, have significant concerns about changes currently being made to the UK's strategic road network as the Government expands its smart motorway plans to increase future capacity.

6.1 Electric vehicles: the start of a revolution?

The way the vehicles we drive are powered is undergoing a sea-change. Encouraged by technological developments on the part of manufacturers – driven, in the EU at least, by requirements on carmakers to cut CO₂ and nitrogen oxide emissions – as well as more general concerns about climate change and air quality, there is a movement towards vehicles with no tailpipe emissions at all.

But to what extent are lower emission models on the radar of today's motorists? The number of drivers who say they plan to buy an electric car next has doubled this year, the 2019 Report shows.

Six per cent of motorists, the equivalent of more than two million people, intend to buy a pure electric battery-powered car when their existing vehicle needs to be replaced. This proportion increases to 15% who say they plan to buy some form of zero or ultra-low emission vehicle next – including pure-electric, plug-in hybrids and hydrogen fuel-cell vehicles. In 2018, the rate was 12%.

And there is an increased willingness, up to 21% from 17%, to buy conventional hybrids, which use a combination of a traditional combustion engine and a battery charged by the engine.

The average motorist, however, does not expect to acquire their first pure electric vehicle until 2030, and only 1% of the motoring population owns such a car at the moment.

The high upfront price of electric cars compared to similar-sized conventional vehicles is still a barrier to widespread take-up, but concerns about vehicle range and nationwide availability of recharging points are now, in reality, becoming lesser issues despite drivers' perceptions.

It is not surprising that motorists in London – where concerns about emissions are higher, incomes are higher and charging points are more prevalent – are far more likely to intend to buy an ultra-low emission car next (26% say they plan to do so versus a national average of 15%). Recent increases in the capital in charges and penalties for using older diesels and petrols may also be playing a part here.

6%



of motorists, the equivalent of more than two million people, intend to buy a pure electric battery-powered car when their existing vehicle needs to be replaced



“There will probably be a point at which the public in general starts to see electric vehicles as a genuinely viable alternative, but these findings suggest that point is still some way off at the moment.”

Mike Quinton
Chief Executive, IAM Roadsmart



6 Driving into the future

6.2 Are drivers ready for road pricing?


Britain’s move towards greater ownership of cleaner vehicles has the potential to create a problem for the Treasury, which is currently estimated to make around £40 billion in tax from UK drivers each year, and £28 billion¹² from fuel duty alone.

As cars use less fuel and more electricity, the Government expects the revenues it receives from drivers to fall significantly in the coming years. So, what are its options to maintain current revenues – and is there an opportunity for a new, possibly fairer, means of taxing drivers in the future?

This year’s Report on Motoring tested some ideas with UK drivers. Almost half of all drivers (49%) agree that the more someone drives, the more they should pay in tax, while 56% agree with the principle of moving away from imposing duty on fuel as more electric vehicles come on to the roads.

Such an approach also has the potential to address problems around congestion and even pollution: a large number of motorists (43%) say that being taxed by the mile driven would lead them to cut out some shorter car journeys.

Meanwhile, this year has seen a decline – from 35% to 30% – in the proportion of motorists who would be willing to pay per mile if such a policy was introduced to replace some existing taxes. And, a clear majority – 75% – say they are concerned that the Government would use the introduction of pay-per-mile taxation to actually increase the overall tax burden placed on motorists.

75% 

say they are concerned that the Government would use the introduction of pay-per-mile taxation to actually increase the overall tax burden placed on motorists



“ It is interesting that there appears to be such a high level of acceptance for pay-per-mile taxation, yet politically no one at the moment would dare to propose such a policy.”

Graeme Paton, Transport Correspondent, The Times



England’s only motorway toll road: the M6 Toll in the Midlands

12. <https://obr.uk/forecasts-in-depth/tax-by-tax-spend-by-spend/fuel-duties/>

6 Driving into the future

6.3 Running the risk: safety and smart motorways

The way our motorways operate is changing. Hundreds of miles of motorways in England are being transformed into what are called smart motorways or more recently 'digital roads' – where an additional lane is introduced to increase capacity. Gradually, drivers will be using motorways that feature no hard shoulder at all – known as 'all lane running' smart motorways – which instead have SOS areas every 1-1.6 miles apart.

This year's Report quizzed motorists on their experience of and views on 'all lane running' – 77% of drivers, the equivalent of 30 million people, have experience on such roads – and found a considerable level of concern about the potential impact of breakdowns or accidents on safety and congestion.

For example, 76% of motorists think a breakdown on an 'all lane running' motorway leads to increased congestion, while 68% believe the removal of the hard shoulder compromises safety to some extent.

Most drivers (70%) worry they would be unable to reach the next SOS area – which could be up to 1.6 miles (2.5km) away – in the event of mechanical failure. However, 53% are confident Highways England would be able to detect and assist a stationary vehicle that could not reach an SOS area.

Only half of drivers (50%) say they know what to do if they break down on a smart motorway and are unable to reach a refuge area.

Six in every 10 drivers (60%) say they often see speed limits on smart motorways reduced for no apparent reason, although most (54%) have confidence in the accuracy of electronic signs in general.

Finally, around half of motorists – 52% – agree that smart motorways are a cost-effective way to increase capacity on congested motorways, with 14% disagreeing.

76% 

of motorists think a breakdown on an all lane running motorway leads to increased congestion





7

Then and now

Are times changing
for the worse?

Increasing congestion and growing levels of rudeness and impatience by other road users mean that driving has never been more stressful. >

7 Then and now

The 2019 Report on Motoring found that a clear majority of drivers (66%) – the equivalent of around 26 million people – say driving is more stressful today than it was 10 years ago (or, for newer drivers, compared to when they passed their test). Yet only a tiny minority, 7%, believe that our roads were more challenging back in 2009, so what is leading to the increased stress?

Increasing traffic levels is the most common driver of stress, our survey reveals: of those who say driving is more stressful, 40% – representing more than 10 million motorists – blamed rising congestion. Official figures support this finding: according to the Department for Transport, the total annual volume of vehicle traffic rose by 6.5% between March 2009 and March 2019 to its highest ever level¹³.



“Overall, one of the most interesting findings is that drivers believe motoring is becoming more stressful – but at the same time, they are unwilling to give up their cars. They seem to be resigned to this increasing level of stress.”

David Leibling, Transport and Motoring Consultant,
Founder of the Report on Motoring

7.1 Rudeness on our roads

But there is also a significant majority who believe that driving standards have deteriorated considerably over the course of the past decade. More than three-quarters of motorists (76%) – the equivalent of 30 million road users – say drivers are less patient today than 10 years ago, while a similar number (70%) say they are more confrontational.

They also appear to be less polite: 63% of motorists think drivers don't thank each other as much as they did a decade ago, while 61% say they don't allow other vehicles into traffic as frequently. Higher traffic volumes are likely to have played some part in increasing impatience. It is possible that the situation has been made worse by a lack of new roads being built to cope with rising congestion, and/or a lack of feasible alternatives to taking the car for some journeys – and perhaps also because not enough money in general has been spent on improving our road network in the past 10 years.

Our research also suggests that drivers with greater levels of experience have a more jaundiced view of how motoring has changed over the years. Some 71% of motorists who have been driving for 10 years or more say that stress levels have increased in the past decade against just 53% of those with less than 10 years' experience.

Newer drivers are also less likely to think that standards have slipped: only 65% say other road users are less patient today, compared with the 80% of more experienced drivers who take this view, for example.

37%



of drivers say that driving stress
has led them to make mistakes

7.2 The consequences of stress

The increase in the stress levels felt by millions of motorists has the potential to create significant danger for both themselves and other road users. Some 37% of drivers – equating to roughly 14 million people – say that being stressed as a result of other motorists' actions or behaviour has led them to make mistakes while driving. Among less experienced drivers, the rate climbs to 50%. Meanwhile, just under a third of motorists (30%) say that stress has caused them to exceed the speed limit.

And worryingly, instances of road rage are also widely thought to be on the rise: 60% of drivers say they see more road-rage incidents today than 10 years ago.



“It is really interesting how the divergence in views between experienced motorists and newer drivers reflects how polarised we have become as a society.”

Claire Haigh, Chief Executive, Greener Journeys

13. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/808916/prov-road-traffic-estimates-apr-2018-to-mar-2019.pdf

8

Views from across the UK

The main concerns of UK's drivers are different depending where they live. Here the Report on Motoring explores the biggest regional differences in the research: from the part of the country where drivers are more likely to break road traffic laws to the region hardest hit by increases in the cost of motoring. >

8 Views from across the UK

8.1 London

Motorists in London are less likely to believe they will be caught if they break motoring laws (34% compared to 23% nationally), the 2019 RAC Report on Motoring has found. This statistic may explain their above-average propensity for behaviour such as using handheld phones and speeding.

In the capital, 41% of drivers say they often make or receive calls on a handheld mobile phone (23% national average), while 57% regularly break 20mph speed limits (44% average) and 51% break 30mph limits (also 44% nationally). London-based motorists are also more likely (38% versus 30%) to have witnessed another driver being physically abused as result of a motoring incident in the past 12 months.

Londoners are less likely to be concerned about fuel costs – only 8% say it is their top concern this year against 12% nationally – while only 51% (versus 67%) say their expenditure on petrol or diesel has increased this year.

But concern about environmental matters is higher here: 17% say one of their top four concerns is the environmental impact of motoring (versus 14%) and 19% say the impact of diesel emissions on health is a main concern (12% nationally).

Unsurprisingly, drivers in London are considerably more likely to intend to buy a pure electric vehicle as their next car purchase (15% versus 6%).

Finally, motorists in the capital are much more likely to say the condition of their local roads has improved this year (25% versus 11%).



8 Views from across the UK

8.2 South East England

The cost of fuel is a major issue for motorists in the South East of England this year, the 2019 RAC Report on Motoring has found: 15% say it is their top concern, against 12% nationally, while 73% say their expenditure on petrol and diesel has risen compared with 67% across the UK. This is borne out by RAC Fuel Watch data which shows the South East is consistently the UK's most expensive region to buy petrol and diesel.

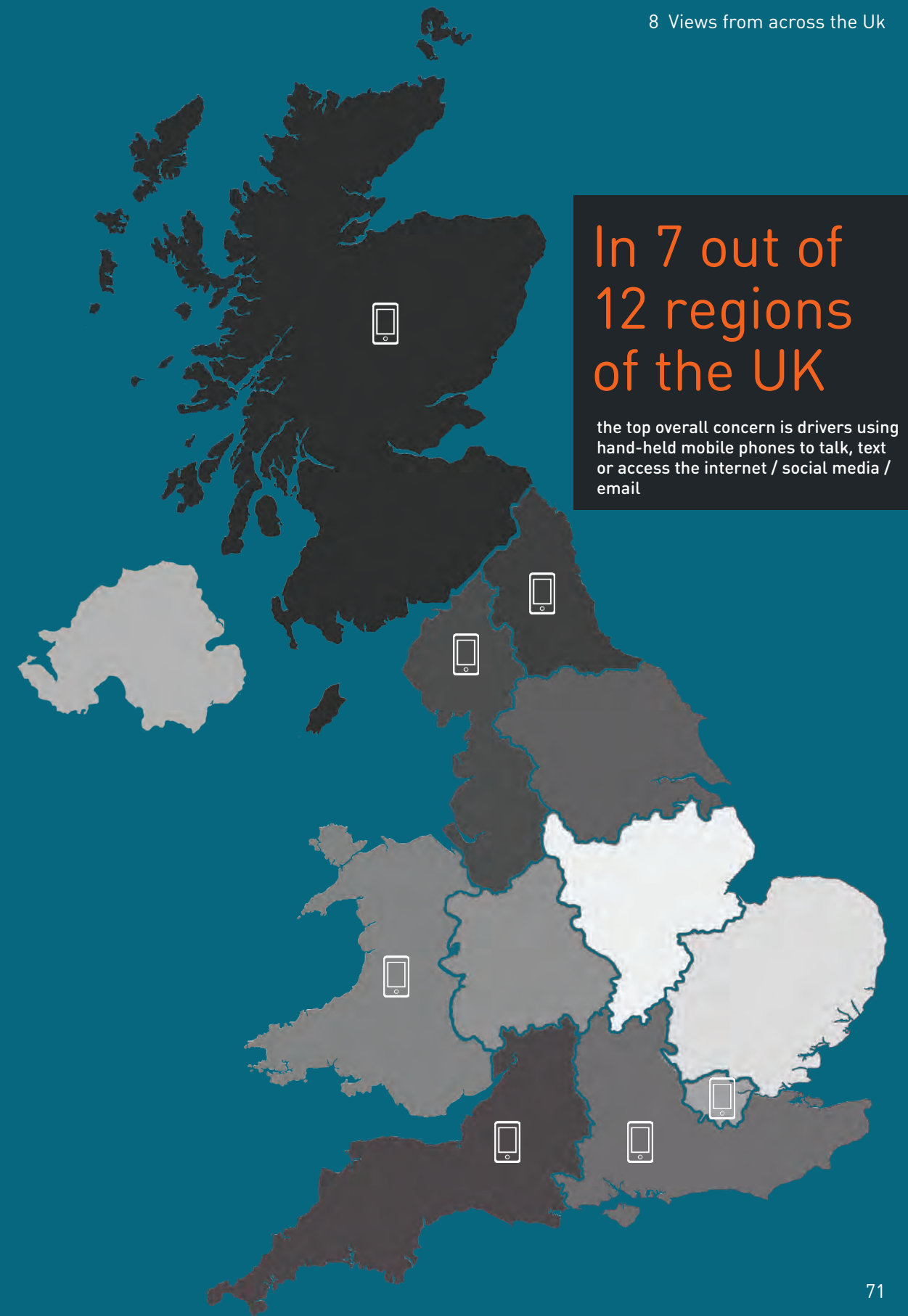
Drivers in the region are paying more for parking – 64% say their expenditure has gone up against 58% nationwide – while a greater proportion (58% versus 52%) say their insurance costs have risen in the past 12 months. Motorists in the South East are more likely to consider buying a pure electric vehicle as their next car purchase (9% versus 6%). And, a greater proportion say the state of the motorways in their region has deteriorated since 2018 (32% versus a 28% average).

8.3 South West England

Drivers in the South West of England are less likely to say motoring has become more stressful over the past decade, the 2019 RAC Report on Motoring has found: only 58% think this compared to a national average of 66%.

In the region, 51% of drivers say they see more road rage incidents today than 10 years ago versus 60% nationally. Only 24% say they have witnessed another driver being physically abused as result of a motoring incident in the past 12 months compared to 30% across the country as a whole.

Fewer drivers in the South West would be willing to give up their cars for environmental reasons (7% versus 13% nationally), while there is also less willingness to make short journeys on foot or by bike in order to reduce their emissions' footprint (33% against 39%).



8 Views from across the UK

8.4 West Midlands

Motorists in the West Midlands are more likely than drivers in other parts of the UK to break speed limits on urban roads, the 2019 RAC Report on Motoring has found: 51% of motorists say they often exceed 30mph limits and 52% 20mph limits (the national average for speeding on both types of roads is 44%).

A greater proportion of drivers in the region (15% against 12% nationally) say their top concern this year is the cost of fuel. And, they are also less likely (22% versus 28%) to say the condition of motorways has deteriorated.



of drivers in the West Midlands are concerned about the cost of fuel

8.5 East Midlands

The condition of local roads in the East Midlands is a major concern this year, the 2019 RAC Report on Motoring has found. Almost two-thirds of drivers (64%) say the state of local roads has worsened over the last 12 months, compared with 49% nationally.

And, only 3% say local road conditions have improved (versus 11%). As far as motorways are concerned, 32% think they have got worse against 28% across the UK. Major routes crossing the region include the A1(M) and the M1.

There is a greater level of support for vehicle taxes to be at least partly ringfenced to spend on local road maintenance and repair (82% against 77%). Meanwhile, three-quarters (74%) of motorists in the region say driving has become more stressful in the past decade (against a national average of 66%).



of drivers in the East Midlands are concerned about the cost of fuel

8.6 East of England

Almost three-quarters (74%) of motorists in the East of England say their expenditure on fuel has increased in the past 12 months, the 2019 RAC Report on Motoring has found. This is significantly higher than the 67% recorded across the UK as a whole.

This is perhaps explained by the East of England regularly being one of the most expensive places in the country to buy petrol and diesel according to data analysed for RAC Fuel Watch.

Drivers in the region are also more likely to say their insurance costs have risen this year (56% against 52%). The aggressive behaviour of other motorists is an above-average concern for drivers here: 11% say this is their number-one motoring-related concern in 2019, compared with 8% nationally. Some 64% of drivers in the East of England say they see more road rage incidents today than 10 years ago – higher than the 60% national average.

Drivers in the region also have a more negative view of major road conditions: 36% say the state of motorways and major dual carriageways has worsened in the past 12 months (28% nationally) while just 8% say they have improved (11%). Much of the M11 is located in the East of England, while its other major routes include the A47: a 115-mile stretch of this route, between Peterborough and Great Yarmouth, is currently undergoing a major upgrade.



of drivers in the East of England are concerned about the condition and maintenance of local roads

8 Views from across the UK

8.7 Yorkshire and Humberside

Drivers in Yorkshire and Humberside are the most likely in the country to exceed the 70mph motorway speed limit, the 2019 RAC Report on Motoring has found. Some 61% of motorists in the region say they often break the limit compared with 55% across the UK as a whole. Almost three-quarters (74%) of drivers in Yorkshire and Humberside say motoring has become more stressful over the past decade (compared with 66% on average). And, two-thirds (65%) say they would use their cars less if public transport were better (57% across the country). There is more reluctance in the region to pay charges to enter city centres in order to reduce pollution (16% would pay such a charge against 25% nationally).

8.8 North East England

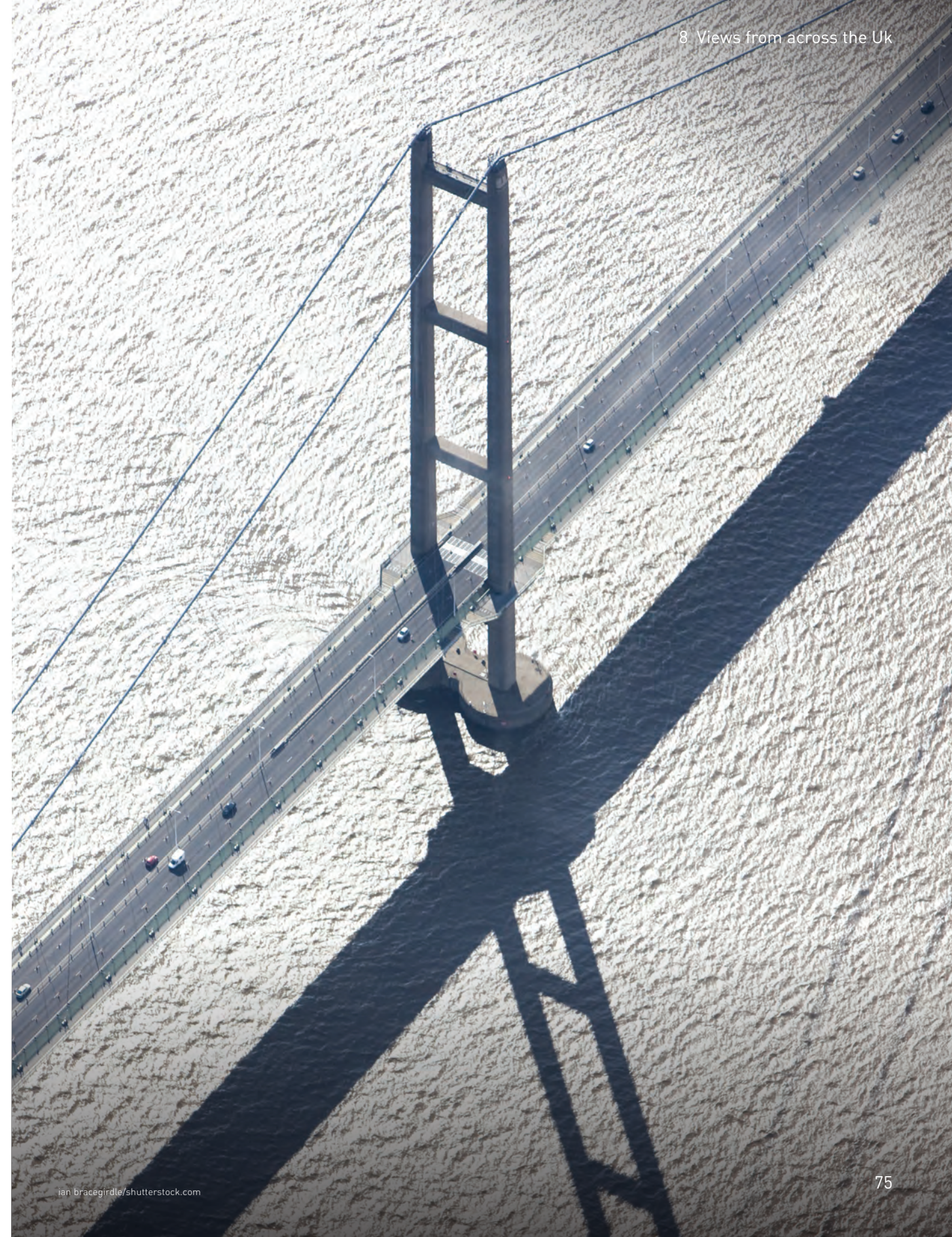
Drivers in the North East of England are more concerned about other motorists using handheld mobile phones, the 2019 RAC Report on Motoring has found: 15% of drivers in the region say this is their top concern this year compared with 12% of the population as a whole. Perhaps this explains why a smaller proportion than in the rest of the UK admit to using a phone to make or receive calls while driving (14% versus 23%).

Road rage appears to be more prevalent: 37% say they have witnessed another driver being physically abused as result of a motoring incident in the past 12 months (the national average is 30%), while 63% say they see more road rage incidents than 10 years ago (60% on average).

8.9 North West England

Concern about aggressive behaviour on the part of other drivers is particularly high in the North West of England, the 2019 RAC Report on Motoring has found. More than one in 10 motorists (11%) in the region say aggression is their top concern (compared to 8% nationally), while 63% say they see more road rage incidents today than 10 years ago (versus 60%). Almost three-quarters (73%) say driving in general is more stressful now than a decade ago (national average 66%).

Meanwhile, more drivers in this region say the condition of local roads has worsened since 2018 (57% versus 49% across the UK), and there is greater support for some vehicle taxes to be ringfenced to pay for road maintenance and repair (82% versus 77%).



8 Views from across the UK

8.10 Wales

More motorists in Wales have increased their dependence on their cars in the past 12 months, the 2019 RAC Report on Motoring has found: the rate in the country has risen to 40% against a 35% national average.

Despite this, concern about the impact of motoring on the environment is higher in Wales (16% against 14% say it is a top-four concern), and drivers are also prepared to take action. More drivers in Wales say they would be willing to walk or cycle shorter journeys for environmental reasons (43% against 39%) or share cars on their commute or other trips (48% against 43%).

Fewer motorists in Wales use handheld phones to make or receive calls (only 17% admit to doing so versus 23% across the UK) – although concern about phone use by drivers is higher here (16% say it is their top concern versus 12% nationwide).

8.11 Scotland

The state of the local roads in Scotland is a much more serious issue than in the rest of the UK, the 2019 RAC Report on Motoring has found. Some 13% of motorists in Scotland say local road conditions are their top concern this year, compared with 10% across the rest of the UK.

Meanwhile, 58% of drivers here say the state of local roads has deteriorated in the past 12 months (versus 49% nationwide), and 34% say the condition of motorways and major dual carriageways has deteriorated (versus 28%).

Unsurprisingly, there is greater support for some vehicle taxes to be ringfenced to pay for road maintenance and repair (84% versus 77%).

Scots are more likely to say their spending on fuel has increased since 2018 (72% versus 67% on average). And, only 17% of drivers in Scotland say they have witnessed another driver being physically abused as result of a motoring incident in the past 12 months (the national average is 30%).

8.12 Northern Ireland

Drivers in Northern Ireland have been hardest hit by recent petrol and diesel price rises, the 2019 RAC Report on Motoring has found: 76% of motorists in the region say their fuel expenditure has risen since last year, compared with 67% across the UK as a whole. While this reaction is very real for residents, RAC Fuel Watch data shows however they pay on average far less for their fuel than the rest of the UK.

Insurance premiums have also increased for more drivers in Northern Ireland: 60% says they pay more in 2019 versus 52% across the country. Drink-driving is a bigger concern for motorists here: 12% say this is their top motoring-related concern compared with 7% on average.

Fewer drivers in Northern Ireland have witnessed another driver being physically abused as result of a motoring incident in the past 12 months (23% against the national average of 30%), while only 53% say they see more road rage incidents today than 10 years ago (60% nationwide).

32%



of drivers in Northern Ireland are concerned about the cost of insurance

9 RAC successes

The RAC continues to stand up for the rights of drivers. Here are some of the successful changes to policy that we have played a part in over the last 12 months.

Red X enforcement

The RAC has long campaigned for improved safety on smart motorways so we were pleased this year that the Government pushed through legislation and type approval of cameras to begin prosecuting drivers who ignore 'red X' signals denoting closed lanes. This will ensure drivers stranded in dangerous positions and those working on the road, such as breakdown patrols, will have extra protection against those who ignore 'red X' signs.

Fuel duty freeze

Our 2018 Report on Motoring data showed concerns about the increasing amount drivers were spending on fuel and led us to call on the Government to retain the fuel duty freeze. In the autumn Budget in October 2018, the then Chancellor announced the planned rise in duty for 2019 would be cancelled.

Parking (Code of Practice) Act

Drivers told the RAC they wanted to see greater regulation of the private parking sector. We lobbied for a Bill to be introduced and were pleased to see the Bill pass onto the statute book in 2019. We continue to urge the Government to produce a final code to provide motorists with a fairer system.

Review of roads policing

The RAC's research has shown consistent dissatisfaction with the lower number of roads police officers. Our research has also shown that some motorists who break the law by using their handheld phones at the wheel do so because they feel they will be able to get away with it. We welcome the Government's review into roads policing and encourage the review to look at numbers of officers and new enforcement technology.

Electric vehicle charging

Last year we called on the Government to increase the provision of electric vehicle charging and to put in place a set of common standards for charging points to encourage EV take-up. We are pleased the Government will be bringing forward mandatory new charge points on new homes, while we also welcome moves to introduce minimum technical standards and simplify access to public charge points as included in the Automated and Electric Vehicles Act.

Local roads funding

The findings from the 2018 Report on Motoring showed that the condition and maintenance of local roads was the top overall concern for drivers. We have campaigned for a better funding settlement to improve the condition of our local road network. We were pleased that our calls for additional funding were met by the then Chancellor in the 2018 Budget. However, we continue to call for a long-term local roads funding solution. The Transport Select Committee's Report in 2019 agreed that local roads need to be given the same long-term funding structure that strategic roads benefit from, as advocated by the RAC. We also welcome announcements by DfT this year to look at how to improve worn-out, unclear road markings, something we know is a growing concern among drivers.



10 RAC calls to action

Helping drivers with costs

Fuel duty

We urge the Government not to increase fuel duty, given the higher costs drivers are facing at the pumps this year due to the volatility in the global oil market and the lower value of the pound.

Insurance Premium Tax

The RAC urges the Treasury to freeze IPT as insurance costs continue to be a significant concern for motorists. The RAC also calls on the Government to reduce the IPT rate for younger drivers who take up telematics 'black box' insurance policies.

Fully implement the Parking (Code of Practice) Act 2019

The RAC played an integral role in helping to bring this act to the statute book. We now encourage the Ministry of Housing, Communities and Local Government to set up the working group that will bring the new national parking code of practice into operation. The basis of this code should be a single, independent appeals' process and a clampdown on certain practices – such as incentivising ticketing – within the private parking sector.

Improving our roads

Secure the future of our local roads

We call on the Government to recognise the strategic importance of local roads and publish a long-term strategy and funding provision for local roads. This will give local authorities the funding certainty required to maintain and improve the condition of the roads they control. The RAC estimates the Treasury could do this by ringfencing just 2p per litre from existing fuel duty revenues which would secure £4.7bn of additional funding for local roads over a five-year period.

Road Investment Strategy 2

The Government's second Road Investment Strategy (RIS 2) should carefully consider the findings of this year's Report on Motoring. While performance metrics for RIS 2 should continue to look closely at road surface quality, there is growing dissatisfaction at levels of litter, the condition of roadside infrastructure, such as safety barriers, and the visibility of signage due to overgrown foliage. Highways England and the Office of Rail and Road should consider including targets within the strategy to improve these aspects of the strategic road network.

Road safety

New approach to roads policing

The RAC welcomes a recent Government review into roads policing. While we believe increasing the number of roads police officers is the most important aspect to be reviewed, we urge the Department for Transport and the Home Office to consider how new types of enforcement technology could be used to reduce illegal behaviour at the wheel, such as the use of handheld mobile phones while driving.

The RAC understands there is new technology available to detect illegal phone use at the wheel and would urge the Home Office to work with the police to trial such systems with a view to them being formally adopted if they are found to be effective.

Smart motorways

We continue to encourage Highways England to retrofit SOS areas to existing stretches to increase their frequency to give drivers a greater chance of reaching one if required and reduce the likelihood of live-lane incidents.

The RAC also calls on Highways England to do more to communicate understanding of smart motorways to drivers, including what to do in the event of a breakdown.

We also call on Highways England to closely monitor the number of live-lane incidents on stretches of 'all lane running' motorways and the impact this has on safety and congestion overall. In addition, we urge Highways England to install the latest technology to detect live-lane incidents involving stationary vehicles to ensure lane closures are carried out quickly and effectively.

Drink-drive limit

Our research shows the number of motorists admitting to driving over the legal limit has remained high in 2019. The RAC calls on the Government and police forces to continue communicating the dangers of drink-driving and to ensure enforcement is given sufficient priority so that offenders can expect to get caught. The Government should carry out a review into the effectiveness of reducing the blood alcohol limit to 50mg/100ml in England and Wales in line with those in Scotland and many other European countries.

10 RAC calls to action

Slow down, move over

The RAC urges both the Department for Transport and Highways England to adopt the 'slow down, move over when safe to do so' campaign when drivers are approaching broken-down vehicles on motorways or dual carriageways. We would also like to see this rule included within the Highway Code.

National review of speed limits

Our research findings in 2019 show that compliance with speed limits remains a concern. We encourage the Government as part of its road safety strategy to look closely at guidance relating to the setting of speed limits to make sure they are appropriate for the road environment.

The environment and the future of our roads

Electric vehicles

The RAC's research suggests more is required to encourage take-up of zero-emission vehicles. The cuts to the plug-in car grant in 2018 were a retrograde step and we believe the Government should enhance the incentives to switch to the cleanest, least polluting vehicles.

Consideration of more favourable VAT rates on the sale of new electric vehicles could significantly reduce upfront costs. Alongside this, the RAC believes improved and easier charging access for consumers should remain a priority.

In addition, local authorities should look closely at mechanisms to encourage take-up of the 'cleanest' vehicles, including easier and cheaper parking rates and access to bus lanes, while the Government could also exempt zero-emission vehicles from toll routes.

Taxation review

The RAC believes there is now scope for the Treasury to review the future of motoring taxation as the tipping point towards far greater electric vehicle take-up approaches. We believe that such a review must consider the views of drivers and present a fair, new approach in terms of how we pay for our roads as fuel duty revenues decline in the future.

Consumer awareness of Clean Air Zones

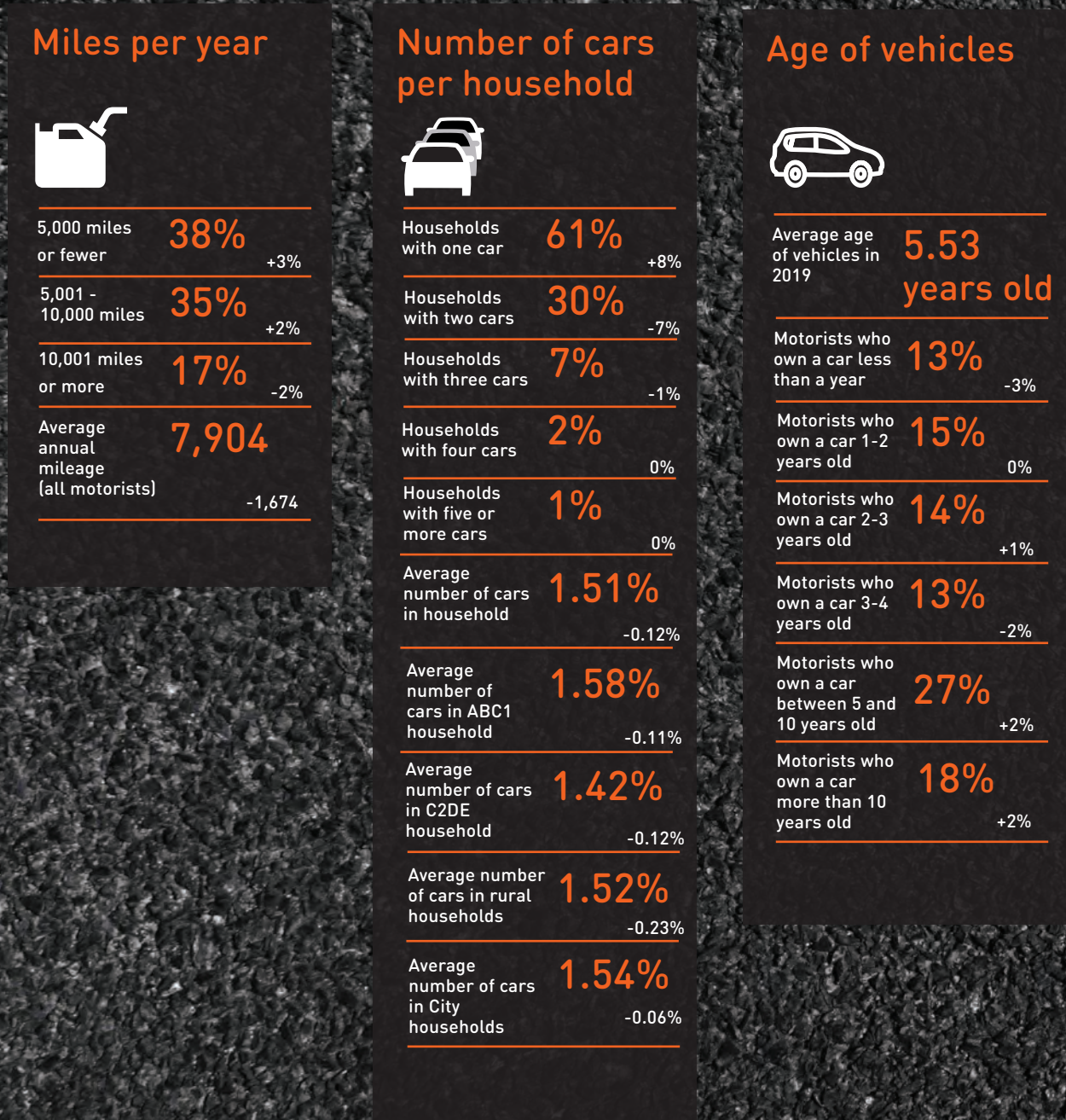
In 2020 the UK's first Clean Air Zones will be introduced in some larger UK cities. Drivers of vehicles which are deemed to be too polluting may be required to pay a charge to enter these cities. We believe it is essential that individuals and businesses that may face charges have access to a national online vehicle checker so they can use registration plate details to find out their vehicles' Euro emissions standards. The RAC continues to call on the Government to prioritise this as a matter of urgency.

Pavement parking

The RAC recognises that anti-social parking can have a huge impact on vulnerable road users and we welcome the review into how to reduce the prevalence of this. We do not favour a blanket ban as we believe this could have unintended consequences such as shifting parking problems elsewhere and narrow roads becoming inaccessible to larger vehicles such as fire engines, ambulances or refuse collection vehicles. However, we believe there is a case to review the clarity of the law overall, the enforcement powers of local authorities and amend the Highway Code to make it clear to drivers of what is and is not acceptable.

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

11 Who is the motorist?



12 Appendix

12.1 Research methodology

The RAC Report on Motoring 2019 is based on a large-scale online survey carried out by Quadrangle on behalf of the RAC. In total, Quadrangle interviewed 1,753 UK motorists (i.e. those who hold a full, current driving licence, drive at least once a month and have a motor vehicle in their household). The survey was conducted between 23 May and 3 June 2019, with the questionnaire taking around 30 minutes to complete. The sample was nationally representative of age, gender, socio-economic groups, all UK regions, and car ownership (company car drivers vs. private car owners).

12.2 Statistical reliability

Any figures taken from a sample of a population should not be taken as a precise indication of the actual figures for that population. The reported figures are estimates, within a small margin of error, of the actual figures. The margin of error varies with sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering: the margin of error is smaller for a 90% or 10% result than for a 50% result.

In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with an example sample size of 1,000, and the actual sample size of the survey, 1,753.

Sample size	Reported percentage at 95% level of confidence				
	10% or 90%	20% or 80%	0% or 70%	40% or 60%	50%
1,000	+/-1.86%	+/-2.48%	+/-2.84%	+/-3.04%	+/-3.10%
1,753	+/-1.40%	+/-1.87%	+/-2.15%	+/-2.29%	+/-2.34%

How to read the above table: Assume the reported percentage, with a sample base of 1,753, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.87%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with a sample size of 1,753 will produce a percentage of 23%, plus or minus 1.87%, or within the range of 21.13% and 24.87%.

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

13 Advisory panel and company overview

Advisory panel

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

Chaired by Phil Ryan

Managing Director, Business Roadside, RAC

Matthew Avery

Director of Insurance Research, Thatcham Research

Gemma Brand

Head for Statistics, Roads and Freight, Department for Transport

David Davies

Executive Director, Parliamentary Advisory Council for Transport Safety

David Leibling

Transport and Motoring Consultant and Founder of the Report on Motoring

Mike Hawes

Chief Executive, Society of Motor Manufacturers and Traders

Mike Quinton

Chief Executive, IAM RoadSmart

Darren Shirley

Chief Executive, Campaign for Better Transport

Steve Gooding

Director, RAC Foundation

Suzette Davenport

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

Theo de Pencier

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

Graeme Paton

Transport Correspondent, The Times

Claire Haigh

Chief Executive, Greener Journeys

Company overview

With 11.7 million members the RAC is a trusted expert on all things driving, offering complete peace of mind whatever the driving need.

The RAC provides state-of-the-art roadside assistance, attending more than two million breakdowns every year, and as is constantly innovating to meet the needs of its customers and keep pace with vehicle development.

It was the first breakdown company to develop a trailer deployable from the rear of a patrol van to tow a stricken vehicle by either its front or rear wheels. The RAC took this a stage further in 2018 by launching an 'all-wheels-up' recovery system capable of transporting cars with all four wheels off the road, allowing its patrols to rescue many more cars without having to call out additional recovery vehicles.

In 2019 the RAC developed the first lightweight, mobile electric vehicle (EV)-charger system capable of giving stranded out-of-charge vehicles an up to 10-mile power boost from a standard orange RAC patrol van. It also launched the RAC 4x4 HD patrol van which features both pieces of equipment and allows a wider range of vehicles to be recovered from a single van than ever before

In addition to breakdown assistance the RAC offers drivers a full range of insurance products, an online shop, a new and used car buying website, vehicle history checks, a vehicle inspection service, and a nationwide network of approved repair garages and used car sales dealerships.

It also campaigns at a national level on a variety of issues of concern to UK drivers, including the condition and maintenance of roads, fuel prices and road safety.

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