



Report on Motoring 2020

Driving through the pandemic





COVID-19

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Contents

RAC Report on Motoring 2020

Introduction	4	Section 4	
<hr/>		Speeding and in-car distractions	34
Section 1			
Car dependency and the pandemic	6	Putting the brakes on	36
<hr/>		Speed limit enforcement	38
Car use drops in wake of pandemic	8	Safety technology	40
– but only for some drivers		and in-car distractions	
Having access to a car has	10	Section 5	
become more important		New cars and the environment	42
Cost pressures ease	14	<hr/>	
– but not for all		Choice of next car	44
Section 2		– a changing picture	
The state of our roads	16	Drivers' preference for safety	46
<hr/>		technology in new cars	
Local road problems	18	More drivers prepared to	47
Motorways and other major roads	22	go electric – just not yet	
Taxes to fund better	23	Motoring and the environment	50
road maintenance		Section 6	
Journey times and congestion	24	Our work for drivers	52
Section 3		<hr/>	
The dangers on our roads	26	Section 7	
<hr/>		Our message to government	56
Handheld phone use still too high	28	<hr/>	
Dangerous driving	31	Section 8	
Driving under the influence	32	Drivers and their vehicles at a glance	60
Focuses for police enforcement	33	<hr/>	
		Section 9	
		Research methodology	62
		<hr/>	
		Section 10	
		Company overview	64
		<hr/>	
		Advisory panel	66

Introduction

What did the arrival of Covid-19 mean?

While 2020 will doubtless go down in history as **the year of the coronavirus pandemic**, just what did the arrival of Covid-19 mean for the UK's 40m drivers? How did it affect the use of their cars, their behaviour on the roads, and their plans to **change vehicles in the future**? And how did it change their use of public transport and will it lead to them walking or cycling more in the future?

Besides the pandemic, much else has happened in 2020 that might have altered how drivers think and act. This year might also be remembered as a milestone in the availability of battery electric, zero-emission cars, with far more models coming on to the market than ever before as well as the first **new Clean Air Zones outside London** finally getting the green light.

So how are drivers' opinions changing in light of these developments? And what about drivers' attitudes to other, long-running motoring-related issues such as the problem of **illegal mobile phone use** – a topic the RAC has tracked in detail for many years – and the **state of the country's roads**?

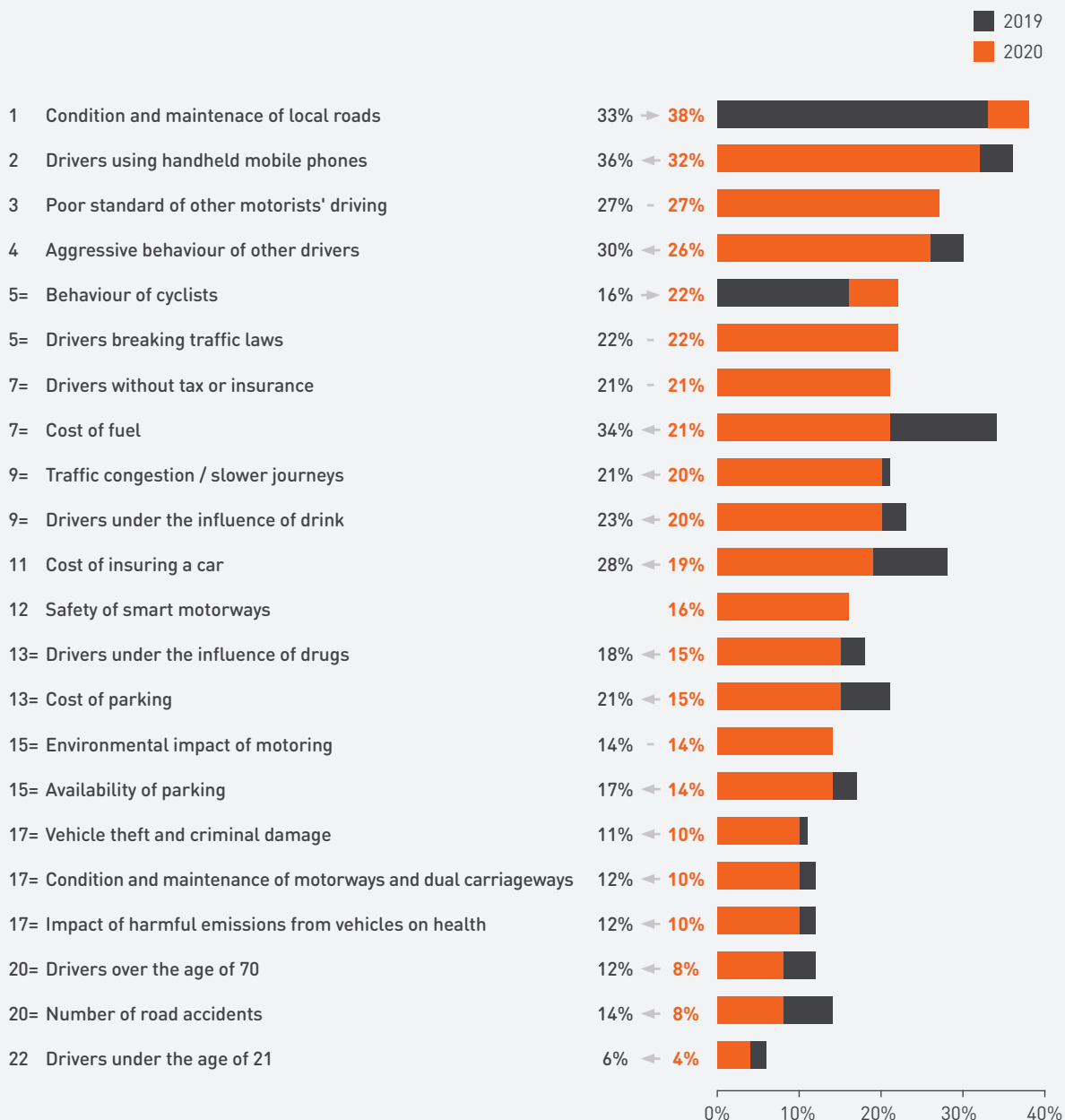
These are just some of the areas covered in this year's RAC Report on Motoring. Coupled with valuable insight from a varied panel of experts in the motoring, mobility and wider transport sectors, and a series of easy-to-read graphics to help readers make sense of the data, the Report remains one of the **most comprehensive studies** on driver behaviour and opinion available in the UK.

The infographic on the opposite page illustrates which issues concern drivers most in 2020 and how this has changed since last year.



How have UK drivers' top concerns changed in the last 12 months?

% of drivers that said the issue was a concern to them



1

Car dependency and the pandemic

The Covid-19 pandemic, as well as having had a dramatic impact on car usage, is also reinforcing the bond between British drivers and their cars, the research reveals. The nationwide lockdown restrictions imposed in March unsurprisingly led to a marked decline in traffic levels. But the 2020 Report on Motoring has found that motorists are now more reliant on their vehicles than in the past – largely due to concerns about the safety of public transport and a lack of adequate alternatives.





NHS COVID-19
Drive Through
Testing

Stop here

- Please stay in your car
- Turn off your engine
- Apply handbrake
- Remove seatbelt
- Prepare test
- Lower your window

1.1

Car use drops in wake of pandemic – but only for some drivers

Almost half of drivers (49%) report that **their vehicle usage has declined** in the past 12 months – by way of comparison, only 21% of motorists said their usage had fallen in 2019. Three-quarters (75%) of those say that Covid-19 is the main reason that they are driving less, with a further 18% citing the pandemic as a contributory factor. But interestingly, a third are using their vehicles just as much as last year and 17% are using them more.

Clearly, the rise in the number of people who started working from home rather than commuting to an office or other workplace since March played a significant role in the drop in car use. But the figures suggest that the switch to home-working could, in a limited number of cases, become permanent: while **67% say they typically travelled to and from work by car pre-Covid-19, 64% expect to do so in the future**. At the same time, while 18% of car owners said they normally worked from home prior to the pandemic, 24% expect to do so even as we emerge from the crisis. And more than a third (36%) of motorists believe they will work from home more frequently – even if not all the time – in the post-pandemic world.

Nonetheless, for many motorists, working from home is not an option – which could help explain why car use levels are unchanged for a third of them (33%). It should also be noted that the **Report on Motoring research was carried out before the re-opening of schools in September** – a development that is likely to have led to a rise in vehicle use for many families.

Indeed, statistics from the Department for Transport¹ suggest that car use started to return to normal levels from the start of September, while separate RAC Insurance data shows a marked rise in morning traffic between 8am and 9am, as a result of the return of the school run².

Meanwhile, most motorists (55%) do not expect their car use to change as the UK comes out of the pandemic. Of the 22% who expect to use their vehicles more, the main reasons are for leisure (83%) and commuting (50%).

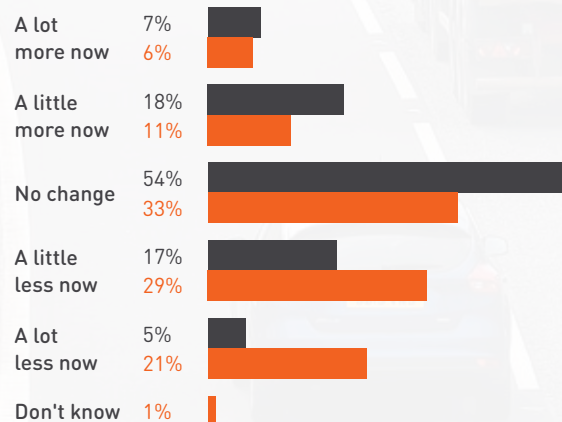
1. www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic

2. media.rac.co.uk/pressreleases/rac-data-confirms-the-morning-rush-hour-has-fully-returned-3036057



Compared to 12 months ago, how has drivers' vehicle usage changed?

■ Drivers in 2019
■ Drivers in 2020



1.2

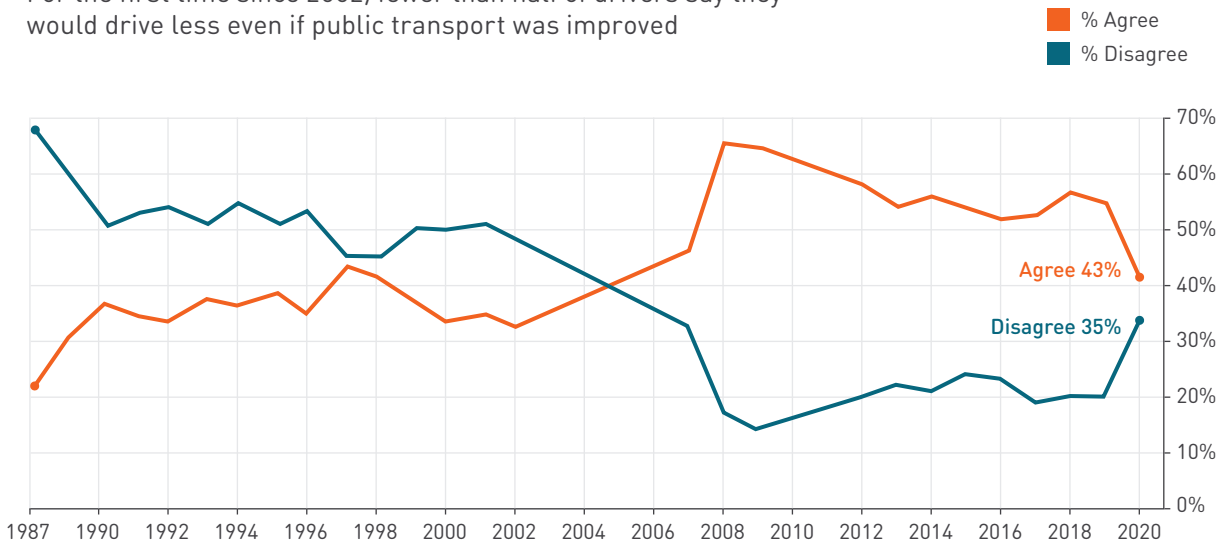
Having access to a car has become more important

Only 31% of motorists say they have become more dependent on their cars in the past 12 months compared with 35% in 2019 – a figure that should not come as a surprise given this year's movement restrictions. But despite this decrease in dependency, drivers say that having access to a vehicle has become crucial: 57% of motorists say that having access to a car is more important given the pandemic than in it was before.

To underpin this finding, **the majority of motorists (52%) say they will use public transport less in future** as a result of the pandemic – and the potential for tightly packed buses and train carriages to increase the spread of infection. Meanwhile, for the first time since 2002 fewer than half of drivers (43%) say they would use their cars less if public transport was improved – down sharply from 57% in 2019. While drivers were asked to consider their use of public transport in non-pandemic times, the coronavirus has likely had a significant impact on how drivers answered.

Would drivers use their cars less if public transport was better?

For the first time since 2002, fewer than half of drivers say they would drive less even if public transport was improved



Expert view



“ It’s encouraging to see car dependency has fallen this year and that walking has replaced shorter journeys for many people. But in order to lock in this reduction and its benefits as we begin to travel around again, the Government must urgently address the perception of public transport and do more to encourage people out of their cars. To do this, there needs to be policy and fiscal measures to improve public transport, alongside actively promoting and incentivising more sustainable forms of transport, particularly in the post-Covid era.”

Darren Shirley, Chief Executive, Campaign for Better Transport





33%

of drivers say they're driving
just as much in 2020 as in 2019

57%

say having access to a car is
more important given the
coronavirus pandemic

Nonetheless, taken at face value, the declining appeal of public transport seemingly represents a seismic shift compared to recent years, and suggests **drivers are more wedded to their cars than they have been for a long time.**

Government data also supports this, with public transport use still lagging far behind motor vehicle use in terms of recovering to pre-lockdown levels³.

Over the longer term, the number of bus journeys taken in England has fallen⁴:

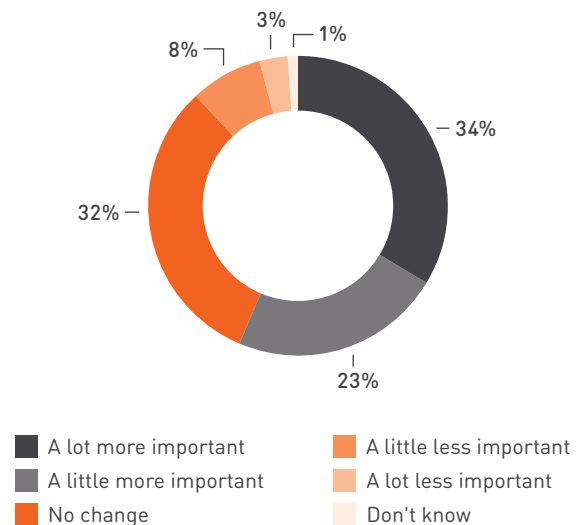
It is also the case that more drivers **(79%) say they would find it 'very difficult' to adjust to life without a car** (73% in 2019).

While the most common reasons, like last year, are being able to carry heavy items (68%) and staying connected (59%), more than half (54%) say this is because they see cars as a safer form of transport during the Covid-19 pandemic.

Fewer drivers say they cycle regularly in 2020 compared to last year – just over a fifth (22%) do so at least once a month, down from 30% in 2019.

Given that only 3% said they cycled to work before the pandemic it is unlikely that the 'working from home' factor alone is responsible for this drop. The proportion using public transport this often has also **fallen from 43% to 31%.**

How important to drivers is having access to a car now, compared to before the pandemic?



“ The challenge for central and local government and public transport operators to win back widespread confidence and patronage, thereby returning usage to pre-pandemic levels, is starkly revealed.”

Theo de Pencier, Non-Executive Director, Transport Focus

Expert view

3. www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic

4. www.nao.org.uk/report/improving-bus-services-in-england

1.3

Cost pressures ease – but not for all

As car usage dropped during the Covid-19 lockdown, **the cost of fuel is understandably less of a concern for motorists in 2020**. More than a third of drivers (36%) say their overall fuel expenditure has dropped this year – only 5% said the same in 2019.

While the cost of fuel dropped to lows not seen since 2016, the majority of drivers weren't able to take advantage of these low prices due to the coronavirus movement restrictions. Even as the lockdown was eased, prices haven't rebounded to levels seen at the beginning of the year.

Indeed, only 6% of drivers say their top driving concern in 2020 is the cost of filling up, down from 12% last year.

Nonetheless, three in every 10 motorists report that their spending on fuel has risen this year – with higher mileage drivers, those who clock up more than 10,000 miles a year, most likely to say this.

Meanwhile, **13% (up from 9%) say their insurance premiums have fallen** in the past 12 months. This could at least partly reflect the decision by some insurers to offer partial refunds to policyholders based on their usage reduction during lockdown in the spring. This is also reflected by the Association of British Insurers' motor insurance premium tracker, which shows the average cost of fully comprehensive cover fell during the summer of 2020⁵.

13% ↓↓

of people say their car insurance premiums have fallen in 2020

36% 

say fuel expenditure has dropped

5. www.insurancetimes.co.uk/news/covid-cuts-average-price-of-motor-insurance-premiums-abi/1433968.article



55%



do not expect their car use to
change as the UK comes out
of the pandemic

STAY HOME
Essential Travel Only

OCEAN



2

The state of our roads

Despite the dramatic fall in car use that has resulted from the Covid-19 pandemic, ongoing issues such as potholes, poor signage and litter mean that the state of local roads is officially the UK's most widespread motoring concern in 2020. This year's RAC Report on Motoring has found that 14% of drivers – representing almost six million people – say the condition and maintenance of local roads is their number-one concern, up from 10% in 2019.





2.1

Local road problems

There has been a significant increase in the number of drivers who say local roads have deteriorated in 2020: this year, 52% say conditions are worse than 12 months ago compared with 49% in 2019. **Only 6% of drivers think the state of local roads has improved**, a dramatic fall on last year's 11%.

Those based in rural areas are more likely to say roads have worsened (59%), as are older drivers (62% of those aged 45 and over say conditions have deteriorated). Meanwhile, more of those based in London (10%) and other urban centres (12%) think the state of roads is better in 2020.

For the overwhelming majority of drivers who say conditions have deteriorated, problems with road surfaces such as potholes remains the number-one gripe (97%). **But this year there has also been a sharp increase in complaints related to other factors such as the visibility of signage** (cited by 46% of drivers in 2020 compared with just 17% a year ago), the amount of roadside litter (35%, up from 23%) and a lack of grass and/or foliage maintenance (34% from 22%).



“ I’m not sure how much local road maintenance was done during lockdown. Spring is when much of the damage caused by winter weather is addressed. I suspect the picture is pretty fragmented with each local authority behaving slightly differently.”

David Bizley, RAC former Chief Engineer
and Technical Director

Expert view

52% 

say the condition of the local roads has worsened this year



Potholes

#1



The condition and maintenance of local roads is drivers' biggest concern in 2020

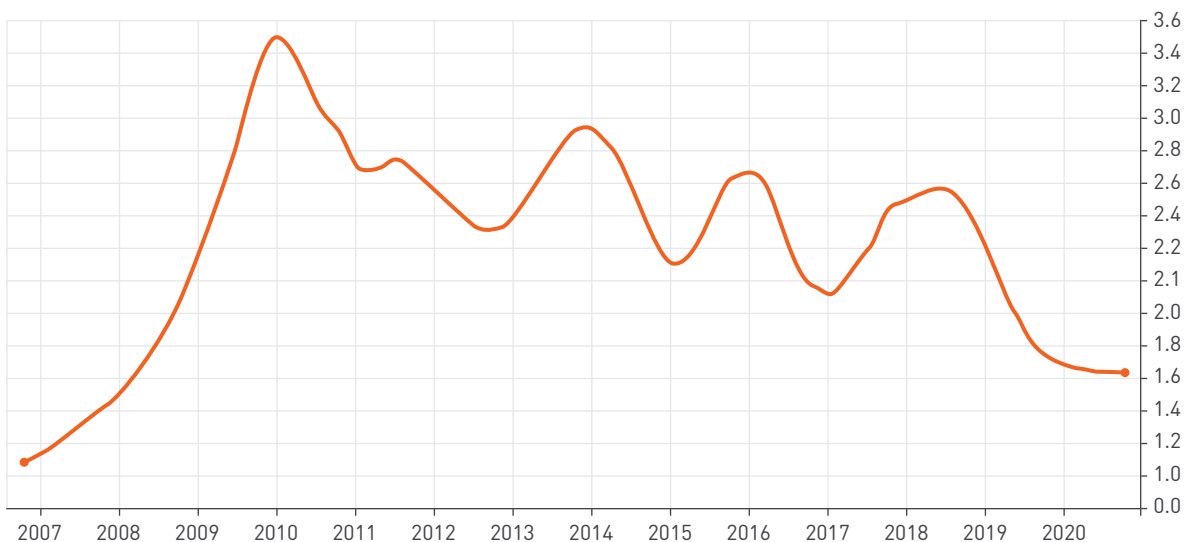
■ 2 The state of our roads

The RAC's Pothole Index provides insight into the state of the UK's roads based on the percentage of breakdown call-outs linked to pothole damage. Recent data from the Index suggests that, even as traffic volumes declined during the spring lockdown period, **the proportion of pothole-related breakdowns remained steady** – even though, with less traffic, there was perhaps a greater opportunity for councils to fix the roads than in previous years. With fewer vehicles on the roads, it arguably should also have been easier to spot and avoid potholes.

It is possible that local roads have deteriorated as a result of local authorities being unable to keep up maintenance programmes as the pandemic took hold, perhaps due to staffing issues – although it also calls into question just how much progress has actually been made in fixing the **11 million 'nuisance' potholes** cited by the transport secretary in May⁶. These findings are also of particular concern given that last year's relatively mild winter should not, in normal circumstances, have led to a further decline in road surface quality.

How likely are you to break down as a result of hitting a pothole?

The RAC Pothole Index tracks how much more likely it is compared to back in 2006, e.g. 2.0 = twice as likely



A 12-month rolling measure of the share of RAC pothole fault breakdowns compared to 2006, corrected for seasonal weather effects and improving longer term vehicle reliability.

6. www.gov.uk/government/news/multi-billion-pound-road-and-railway-investment-to-put-nation-on-path-to-recovery



“ The collapse in traffic levels during lockdown would have been the ideal time for councils to address the massive backlog of repairs on local roads. However, despite a few noticeable exceptions, the experience of motorists suggests that our pothole-strewn network is as bad as ever.”

Graeme Paton, Transport Correspondent, The Times

Expert view

A large, deep pothole on a road surface, filled with water and debris. The pothole is irregular in shape, with a jagged edge. The water is murky and reflects the surrounding environment. The road surface is made of dark asphalt, and the surrounding area is covered in grass and some low-lying plants.

1.5x

Drivers are 1.5 times more likely to break down after hitting a pothole in 2020 than in 2006

2.2

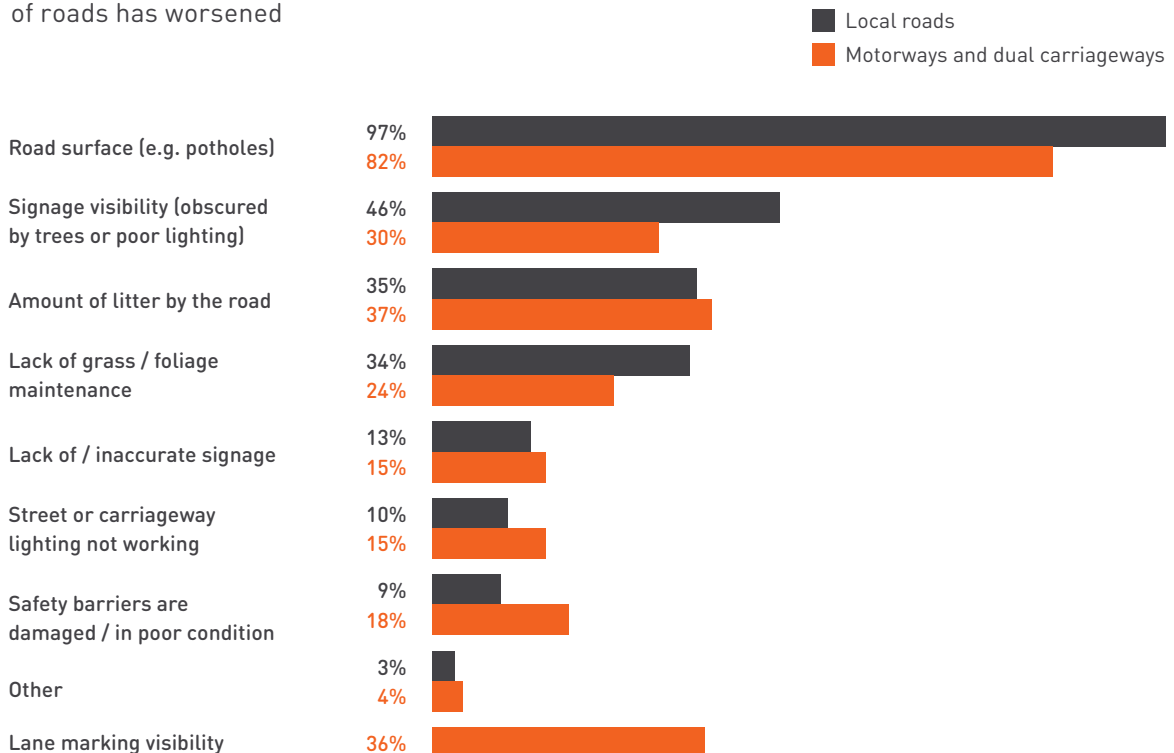
Motorways and other major roads

While there has been no change in the number of motorists who say the condition of motorways and high-speed dual carriageways has deteriorated since 2019 (28%), **only 6% believe they have improved**, well down on last year's 11%.

As with local roads, surface issues are the most common complaint (82%) – but there has also been an increase in 2020 in the number of drivers who say that **conditions are worse due to litter** (37% versus 30% last year), lane marking visibility (36% versus 27%), signage visibility (30% versus 19%) and lack of grass or foliage maintenance (24% versus 18%).

How has the state of the UK's roads worsened?

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



2.3

Taxes to fund better road maintenance

There has been a rise in the number of drivers who support the idea of having a proportion of current taxation – duty and VAT on fuel, as well as Vehicle Excise Duty (VED) or ‘car tax’ – ring-fenced for spending on local road maintenance.

More than four-fifths (82%) back such a plan, up from 77% in 2019. Such a scheme is already in place for major roads, with all of VED in England now used to fund the motorway and high-speed network.

A significant number of drivers would be willing to pay a little more in fuel duty, provided the extra money raised was ring-fenced to pay for local pothole repairs: 47% of motorists would be happy to pay up to 2p more per litre, with only a third (33%) opposed to this idea.

82% 

of motorists want to see a proportion of current taxes ring-fenced to improve local roads



2.4

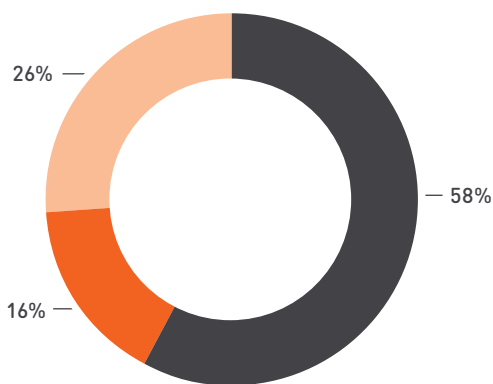
Journey times and congestion

Even though traffic volumes have fallen sharply in 2020 as a result of the pandemic, 5% of drivers say that journey time reliability and congestion are their top driving concern – the same figure as 12 months ago. However, congestion now ranks as only the eighth most widespread concern – its lowest level in five years, a finding no doubt heavily influenced by the fact fewer people were driving during the worst of the crisis.

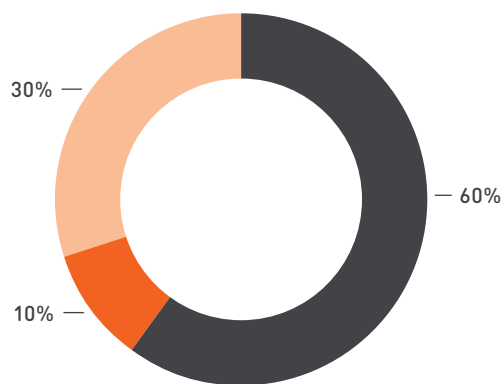
Meanwhile, the majority of drivers say that **journey times are becoming less predictable**, both on motorways and high-speed dual carriageways (60%) and local roads (58%) – although these figures are lower than in 2019 when they were 65% and 66% respectively.

Despite the pandemic, drivers generally feel journey times are becoming less reliable

■ Agree
■ Disagree
■ Not sure / no view



Local roads



Motorways and dual carriageways

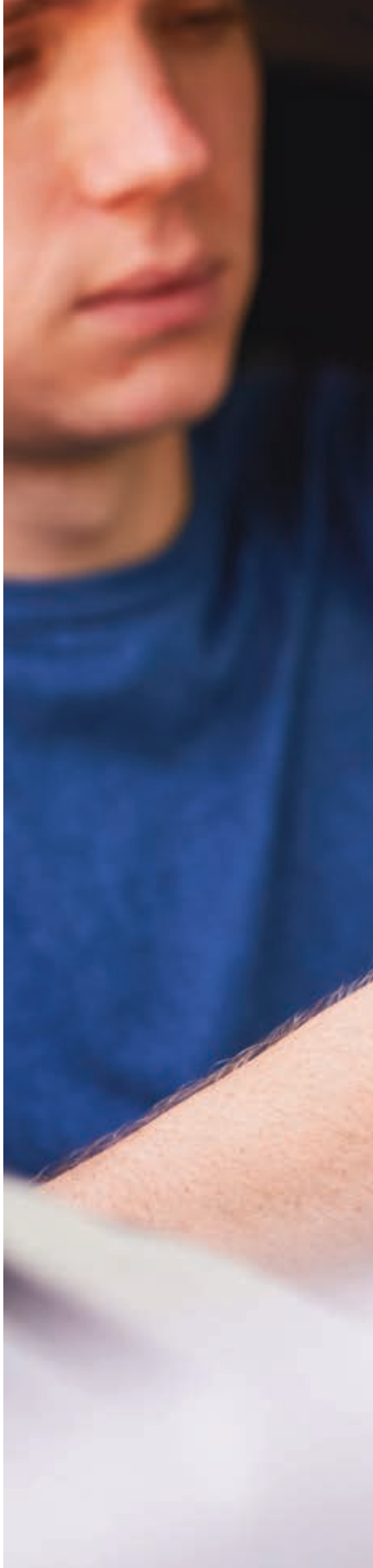


3

The dangers on our roads

One of the biggest concerns for millions of drivers is the danger they face from other motorists on the UK's roads. Three-in-10 (30%) drivers say their top concern relates to the illegal or reckless behaviour of others – from handheld mobile phone use at the wheel to road rage and drink-driving. Indeed, the vast majority of drivers (79%) say they want police to use camera technology to spot illegal mobile phone use.

Speed limit compliance and enforcement are covered in Section 4.





3.1

Handheld phone use still too high

According to the 2020 Report on Motoring, a third (32%) of Britain's 40 million drivers – equivalent to more than 13 million people – say that **handheld mobile phone use by other drivers is one of their top concerns** this year.

And while 8% say it is their number-one concern in 2020, this is in fact a significant fall on the 12% recorded in 2019. It is possible that the dramatic fall in traffic volumes caused by the Covid-19 lockdown, which started in March, means that the average car owner has witnessed less of this kind of law-breaking behaviour in recent months.

The Report also asked drivers about their own behaviour with regard to in-car mobile phone use.

In 2020, there has been a worrying increase in the number of motorists who admit they make or receive calls on a handheld mobile phone while driving: this year, 29% of motorists say they do this at least occasionally, up from 24% in 2019 and the highest proportion since 2016.

It may be that the increase in penalties and public awareness campaigns that were introduced in 2017 following the RAC Report on Motoring highlighting the issue being at epidemic levels have faded from popular consciousness to some extent.

There has also been an increase this year in the number of drivers who say they make or receive handheld calls while their car is stationary with the engine on (which is also illegal): 42% say they do this at least occasionally, up from 39% in 2019.

Three in 10 drivers (28%) say they write texts or emails, or post on social media, while stationary with the engine on. In 2019, the proportion was 30%.

The problem of illegal phone use appears to be particularly prominent among young people. **Almost one-in-five (18%) of drivers aged 17-24 admit to taking part in video calls while behind the wheel,** making them twice as likely to do this than average, while 9% say they play games on their phones while driving.



Drivers using handheld mobile phones is the second biggest concern in 2020



“We are more dependent than ever on our mobile phones but they are a huge distraction for motorists, whether hand-held or hands-free. It comes as no surprise that people see this as a top-three concern for their safety. Car-makers, mobile phone providers and social media companies need to work much more closely with government to deliver a technological solution to a problem they have created.”

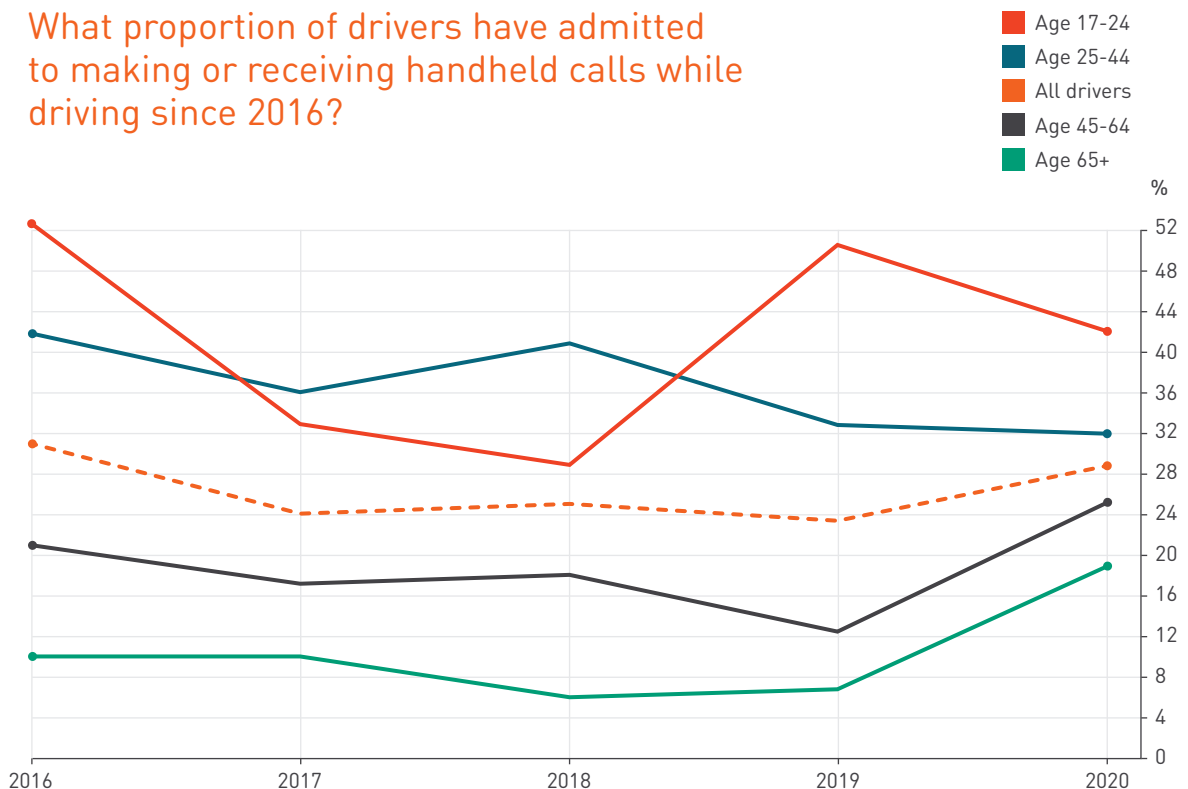
Tony Greenidge, Chief Executive, IAM Roadsmart

Expert view

But there has been a very slight fall in the number of people who check texts, emails or social media while driving: around 15% admit to having done this in 2020, down from 17% last year. And the number who check texts and so on while stationary has dropped from 34% to 29%.

Of the 79% who support the introduction of camera technology to identify illegal mobile phone users – something that has been trialled in other countries – the vast majority (52%) are strongly in favour of this happening.

What proportion of drivers have admitted to making or receiving handheld calls while driving since 2016?



79% 

of drivers want to see cameras introduced to catch drivers using a handheld phone illegally



“ The poor, aggressive or illegal behaviour of other drivers continue to be a major concern for motorists. Although mobile phone use was ranked below local roads this year, there is strong support for greater enforcement. This suggests that the Government’s plans to tighten the laws and step up roads policing are supported.”

David Davies, Executive Director, PACTS

Expert view

3.2

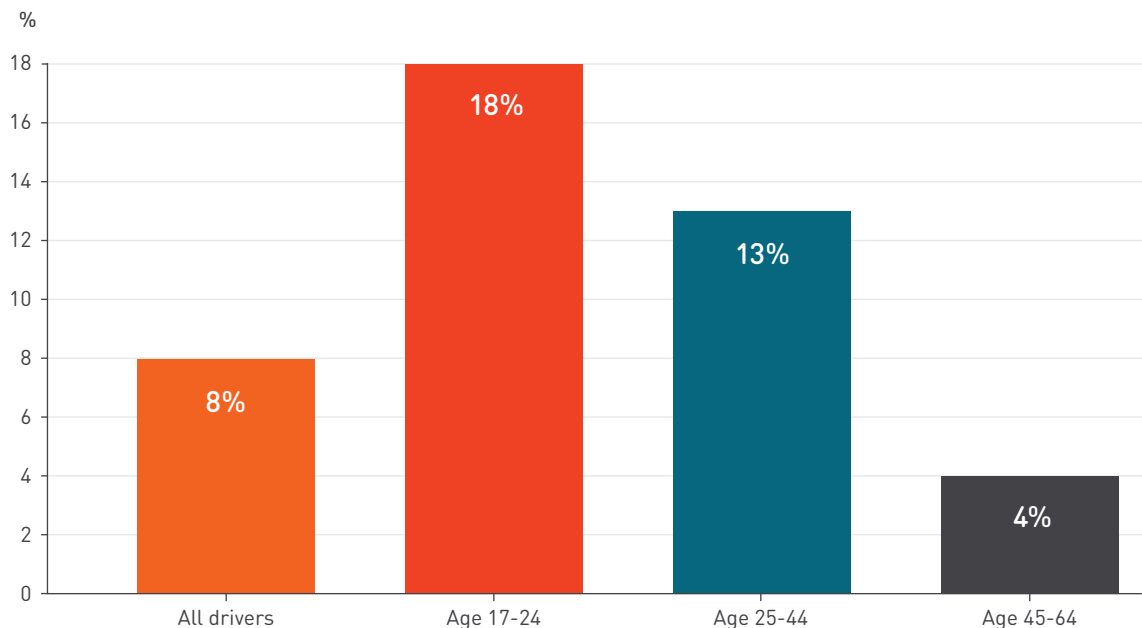
Dangerous driving

The third most widespread motoring concern in 2020 – behind the state of local roads and illegal mobile phone use – is the poor standard of other motorists' driving, cited by more than a quarter (27%) of drivers in 2020. **Aggressive behaviour on the part of other drivers was an issue for (26%) of those surveyed**, making it the fourth greatest concern this year.

Meanwhile, reckless or lawbreaking behaviour on the part of cyclists is a growing concern in 2020: 22% of drivers say this is one of their top four concerns

this year, up from 16% in 2019. It is possible that restrictions on many leisure activities at the height of the lockdown, especially those indoors such as gyms, led to an increase in the number of cyclists on the roads over the spring and summer period, and that this fuelled a rise in concern. Data from the Department for Transport indicated cycling did indeed increase⁷. It is worth remembering that around a fifth of drivers (22%) say that they themselves cycle at least once a month.

What proportion of drivers admit to making or receiving a video call while driving?



7. www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic.

3.3

Driving under the influence

Drink-driving is a top-four concern for 20% of motorists in 2020, down slightly from 23% 12 months ago. **There has also been a fall in the number of motorists who believe they have driven under the influence of alcohol** this year: only 7% think they have, down from 19% in 2019. No doubt this at least partly reflects the

restrictions placed on socialising and the opening of pubs and bars since the Covid-19 lockdown was initially imposed.

Finally, fewer motorists say drug-driving is one of their main four concerns in 2020: the rate has fallen to 15% from 18%.

7% 

of motorists admit to driving under the influence of drink



3.4

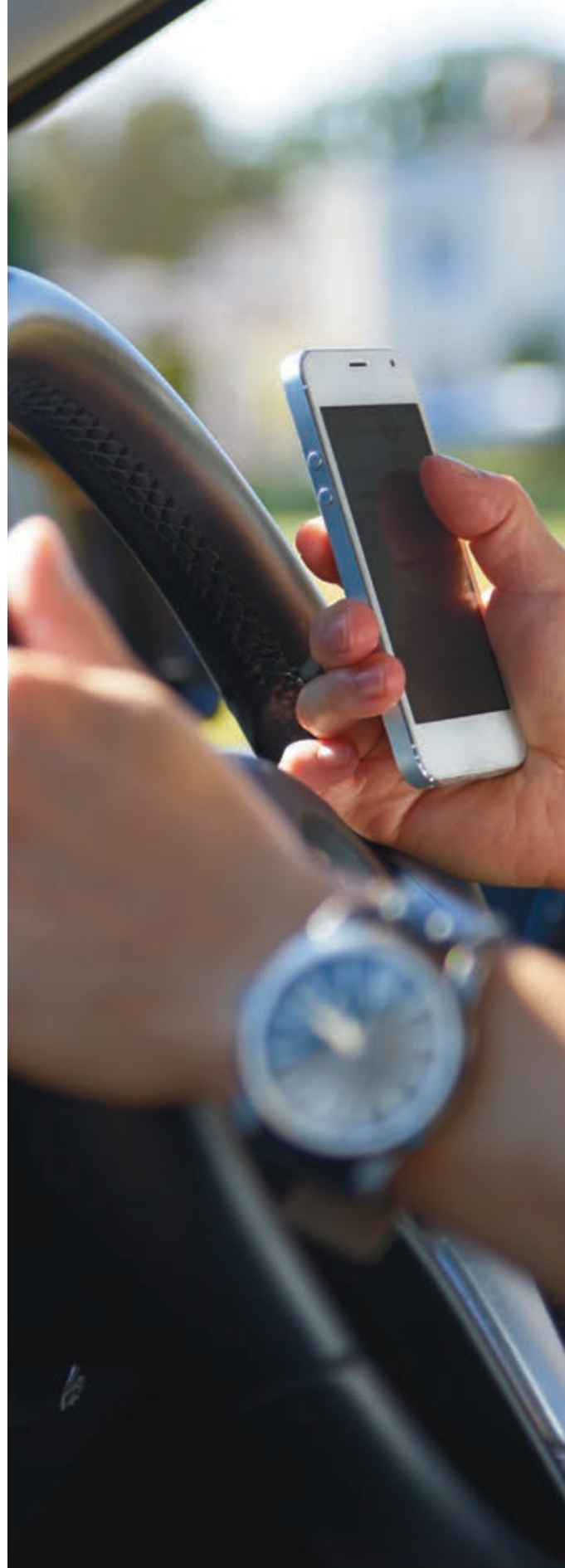
Focuses for police enforcement

Motorists were also asked which traffic laws – aside from speeding – they would most like road traffic police to prioritise in terms of enforcement, with respondents asked to name up to three offences.

A majority (55%) of drivers said police should pay greater attention to combating handheld phone use – a particular concern for drivers over the age of 45 (61%). Dangerous driving was named as a priority by 51%, and by 55% of female motorists. Drink-driving and drug-driving (40% and 30% respectively) were the next biggest priorities, while 24% of motorists said the police should pay greater attention to those who hogged the middle lane on motorways.

55% 

want to see the police do more to catch drivers illegally using mobile phones



4

Speeding and in-car distractions

The number of UK drivers who admit to breaking the speed limit has fallen on most roads dramatically this year, new RAC research reveals. The 2020 Report on Motoring has found that the proportion of drivers who say they occasionally or frequently exceed the speed limit on roads other than the UK's motorways has declined this year.

The Report also shows widespread support for the greater use of average-speed cameras to enforce the 70mph limit on the UK's motorway network, as well as for lower speed limits on some rural roads. Meanwhile, there are concerns among older motorists in particular about the potential for complex in-car technology such as touch-screen controls to cause distractions while driving.





4.1

Putting the brakes on

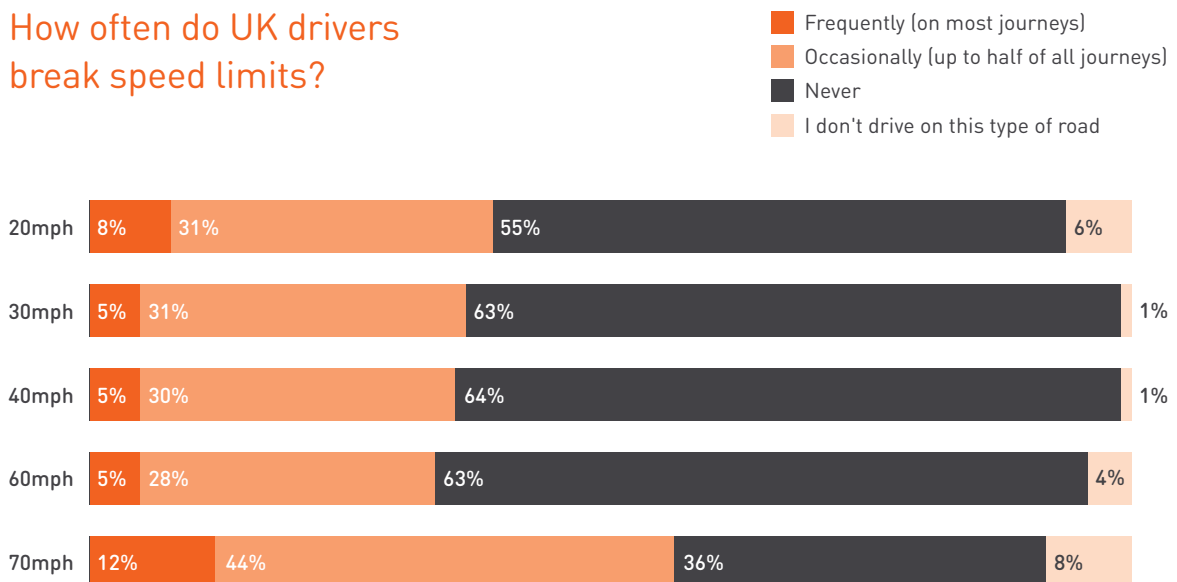
On 60mph country roads and in urban 30mph areas, the proportions of drivers who admit to speeding at least occasionally have fallen to their lowest levels since at least 2010. **A third of motorists (33%) say they exceed the 60mph limit at least from time to time**, down from 38% in 2019, while 36% break the 30mph limit – down from 44% last year.

On roads with a 20mph limit, compliance is also improving with nearly four in 10 (39%) admitting to speeding, down from 44% last year. Only on motorways

has there been a very slight increase in reported speeding: 56% of drivers say they occasionally or frequently exceed the 70mph limit, up from 55% in 2019. This suggests the four-year trend of improving compliance on Britain's fastest roads has now come to an end.

It is unclear why overall compliance with speed limits has improved this year, but this may be partly down to the reduction in the number of journeys carried out for the purposes of commuting – or for other business purposes – where drivers feel greater time pressure.

How often do UK drivers break speed limits?



This year's Report also asked drivers who admit to speeding to say how fast they have driven on different categories of roads and give their reasons for doing so.

A third of those who say they have broken the limit on motorways (34%) say they have exceeded 80mph at times. When asked why they broke the speed limit on a motorway, most drivers (39%) say they were simply following the example set by other motorists, although a greater proportion this year (31%) say it was because they thought it was safe to travel faster than 70mph. **The most common reason given for exceeding the 60mph limit on country roads is that there were no other cars or road users around** – this was cited by 40% of speeders.

Meanwhile, 11% of limit-breakers have driven above 40mph in a 30mph zone while 10% have exceeded 30mph in a 20mph zone. In the case of the latter, 45% of those who speed at least occasionally say this is because they believe the limit is 'inappropriate' for the area or stretch of road in question.



“ Even though 40-60% of drivers (depending on the road type) admit to speeding, half of motorists support the use of average-speed cameras on high and medium speed roads rather than fixed cameras. Average-speed cameras are only supported by a quarter of drivers on 20 and 30mph roads because it is so difficult to keep to the average limit and they are prepared to take a chance with fixed cameras and slow down temporarily.”

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

Expert view

4.2

Speed limit enforcement

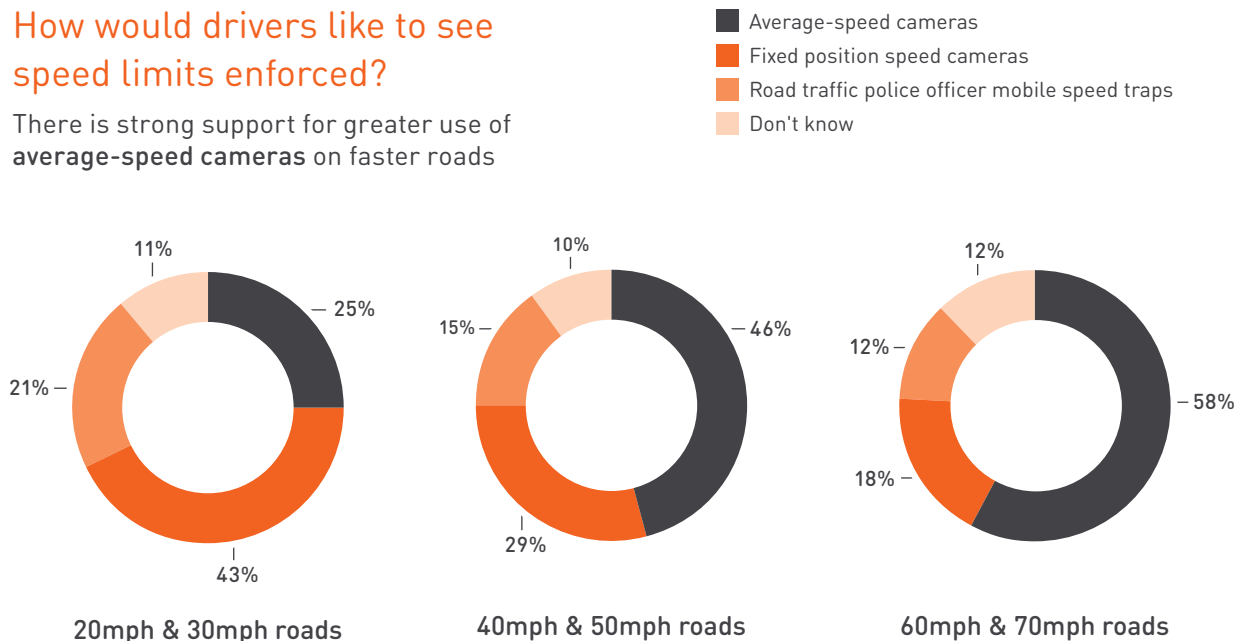
Motorists have differing views on the most effective method for enforcing speed limits depending on the type of road. On faster roads such as motorways or those where the limit is above 40mph, drivers are more likely to favour average speed cameras: 58% of motorists say they are more effective on motorways and 46% say the same of 40mph and 50mph roads. Indeed, **most drivers (54%) think that average-speed cameras should be extended across the UK's motorway network** rather than solely being employed at roadworks.

On lower speed roads, however, fixed-position speed cameras are seen as the most effective solution, backed by 43% of drivers. Overall, two-thirds (66%) of drivers say that cameras of whatever type are a more acceptable solution than the widely disliked speed humps.

Finally, there is widespread support for reducing the 60mph limit on some country roads: **61% are in favour of a lower limit on narrower stretches.**

How would drivers like to see speed limits enforced?

There is strong support for greater use of **average-speed cameras** on faster roads





“ It is interesting to see that over half the respondents said they would like to see greater use of average-speed cameras on motorways, not just at roadworks, but when it comes to priorities for police enforcement action it's hand-held mobile phone use that comes out on top.”

Steve Gooding, Director, RAC Foundation

Expert view



56% / \ \

say they exceed the
70mph limit on motorways

4.3

Safety technology and in-car distractions

Around half of drivers (51%) think that touch-screen control systems are more complex than traditional knobs and buttons – rising to 55% among drivers aged 45 and over. A similar proportion (50%) think touch-screens are more distracting.

Almost half of older drivers (47%) feel that in-car technology is 'taking away from the driving experience', while three in 10 (31%) of those under 45 also agree with this statement.

There is a similar age divide when it comes to relying on sat-nav technology: 70% of under-45s say they would find it difficult to reach unfamiliar destinations without it, compared with just under half (47%) of those in the older age group.

There is also widespread concern about the dangers posed by some vehicles' headlights: 77% of drivers say some cars' lights are now so bright they risk causing accidents, while 58% say they are regularly dazzled by oncoming headlights even when they are dipped.

77%



think some car headlights are so bright they risk causing accidents



“ Touchscreens are more and more popular but are not necessarily a bad thing. The key to a good system is no lag and consistency. Things should always be in the same place and operate in the same way. Manufacturers should harmonise icons and functions to simplify use and enhance safety.”

Matthew Avery, Director of Insurance Research,
Thatcham Research

Expert view



5

New cars and the environment

The economic impact of the Covid-19 pandemic and a decrease in vehicle usage caused by the lockdown has led to a sharp fall in the number of UK drivers who intend to acquire a new car.

The 2020 RAC Report on Motoring has found that only around half of motorists (49%) expect to change their current vehicle for a newer model in the next three years, a figure that is significantly lower than in the last two years (57% in 2019 and 65% in 2018).

At the same time, there has been a rise in the number of drivers who are considering buying either a pure electric car or an ultra-low emissions vehicle. But this year's report has also found a decline in the number of motorists who would consider switching to a zero-emissions vehicle in order to help improve air quality.





5.1

Choice of next car – a changing picture

The pandemic appears to have left its mark on the car-buying public with **only one in every 10 motorists (11%) expecting to upgrade to another vehicle in the next 12 months** – a sharp fall on the 14% recorded in 2019 and 18% a year earlier. But perhaps even more telling, is the finding that just over half of drivers (51%) do not expect to change their current vehicle within the next three years – well up on the last year's 43%, and 35% in 2018.

Meanwhile, **a third of drivers (33%) in 2020 either don't plan to buy a new car**, or do not know when they will replace their current vehicle, up from 25% a year ago.

The factors most likely to be deterring motorists from changing their vehicles this year are the widespread increase in home-working brought about by the initial lockdown restrictions, plus worries about job security and for some a loss of income. With more drivers prepared to hold on to their existing vehicles for longer or unable to afford replacements, there are likely to be unfortunate longer-term implications for national and local governments – the research suggests efforts to encourage more drivers into electric cars and to improve air quality in our towns and cities might both be hindered.

Credit: Vauxhall Motors Limited



In terms of likely next vehicle purchases, cars with petrol engines remain the most popular, although interestingly this popularity is starting to wane. In 2020, 44% of motorists say they are most likely to buy a petrol car next, down from 48% last year and 58% as recently as 2017.

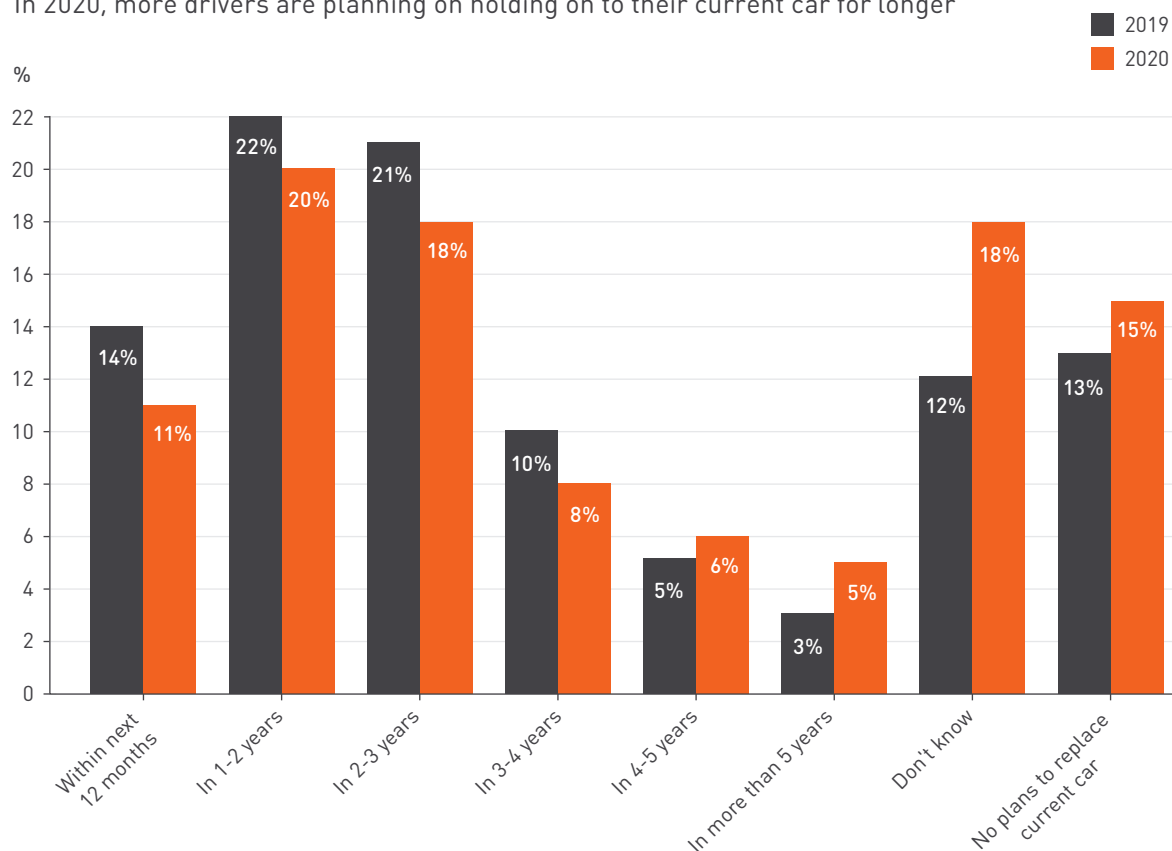
Importantly, **the highest ever proportion of drivers (one in five, 19%) say they will buy an ultra-low emissions vehicle (ULEV) such as a plug-in or pure battery electric car next**, up from 15% in 2019 (see more on electric vehicles below). Ongoing concerns about air pollution

mean that only 16% are planning to buy a diesel vehicle next. Although this is virtually unchanged on the proportion who indicated this preference last year (15%), it is still well down on the 28% recorded in both 2015 and 2016. For the first time this year, a lower proportion of drivers expects to opt for a diesel over a plug-in model.

The majority of car purchases (55%) will be privately funded, with personal contract purchase (PCP) deals accounting for 12%, and 9% made with an alternative form of finance such as a bank loan.

When do drivers expect to change their current cars?

In 2020, more drivers are planning on holding on to their current car for longer



5.2

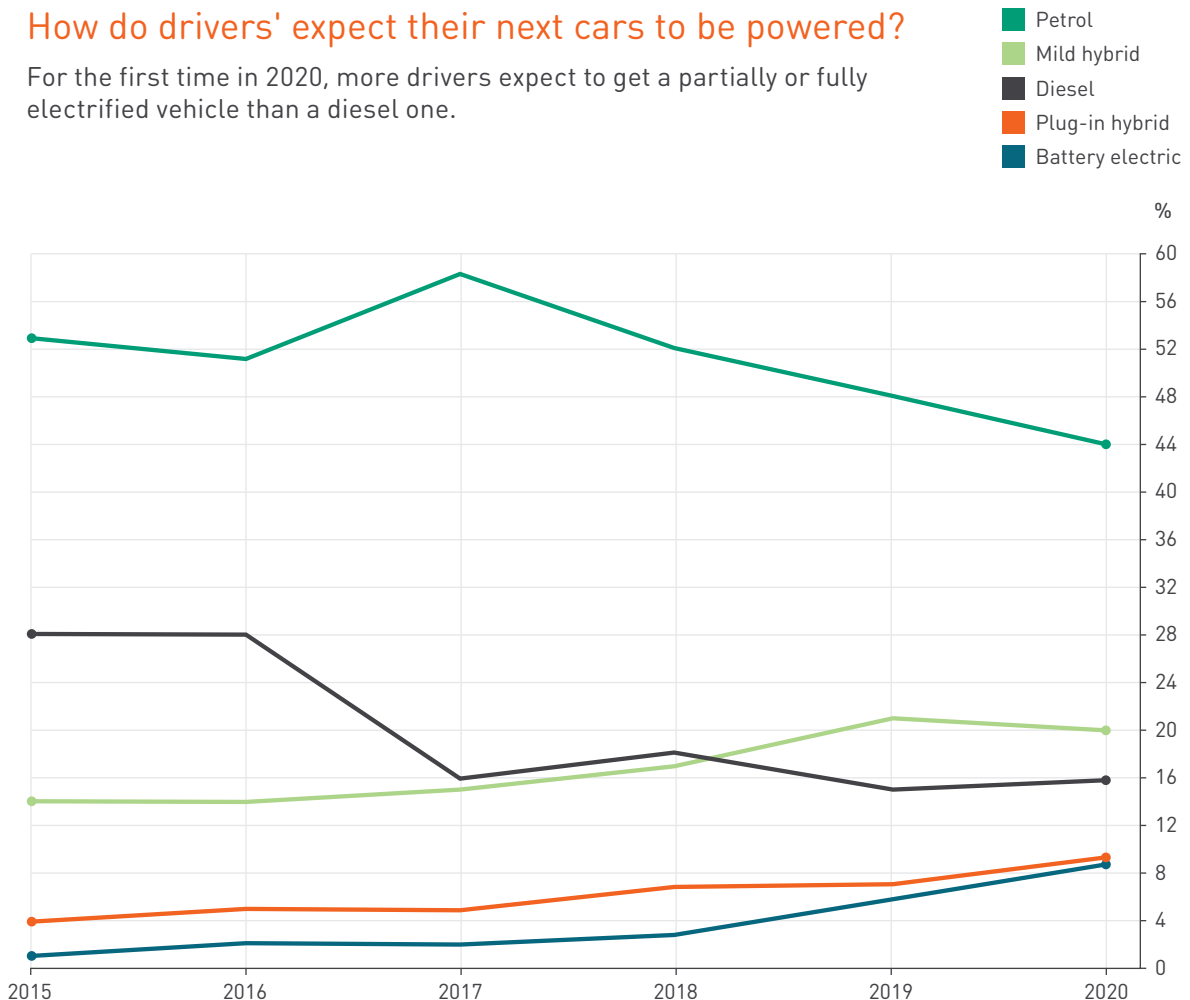
Drivers' preference for safety technology in new cars

This year's Report asked motorists for their views on safety features when purchasing a new car. The most vital feature, described as 'important' or 'very important' by 91% of drivers, is airbags

for all passengers, followed by a tyre-pressure monitoring system (77%), a high EuroNCAP safety rating (76%) and blind-spot detection incorporated in mirrors (75%).

How do drivers' expect their next cars to be powered?

For the first time in 2020, more drivers expect to get a partially or fully electrified vehicle than a diesel one.



5.3

More drivers prepared to go electric – just not yet

The vast majority of motorists (98%) might not currently drive a pure electric vehicle, but as more manufacturers put new electric models on to the market there are clear signs that **UK drivers are becoming increasingly willing to consider an EV (electric vehicle) as their next car.**

While most drivers (56%) say they would be more likely to opt for a plug-in hybrid car as an intermediate step before going fully electric, in 2020 nearly **one in 10 (9%) motorists say they intend to go for a pure electric battery-powered car** next, up from 6% in 2019 and 3% a year earlier. Data from the Society of Motor Manufacturers and Traders (SMMT) shows that pure electric vehicles now make up 6.7% of all new car registrations⁸.

But clearly, there remains a number of barriers to widespread take-up of such vehicles. At present, **78% of motorists think that pure electric cars are still too expensive** when compared to conventional vehicles of a similar size. And 64% say manufacturers need to offer a wider range of EVs before they would consider buying one.

78% 

say electric cars are still too expensive



“These figures suggest there is an evolution rather than a revolution in the public’s demand for electric vehicles. We have more plug-in models on the market than ever before – over 80 different models – which will help increase take-up: visibility breeds acceptability.”

Mike Hawes, Chief Executive, Society of Motor Manufacturers and Traders (SMMT)

Expert view

8. www.smmt.co.uk/vehicle-data/car-registrations/

5 New cars and the environment

The distance an electric car can travel between charges is another issue for potential buyers: on average, **drivers would require a range of 375 miles on a single charge** – a figure unchanged on 2019. At present, the only vehicle available in the UK that offers such a range is the high-end Tesla Model S.

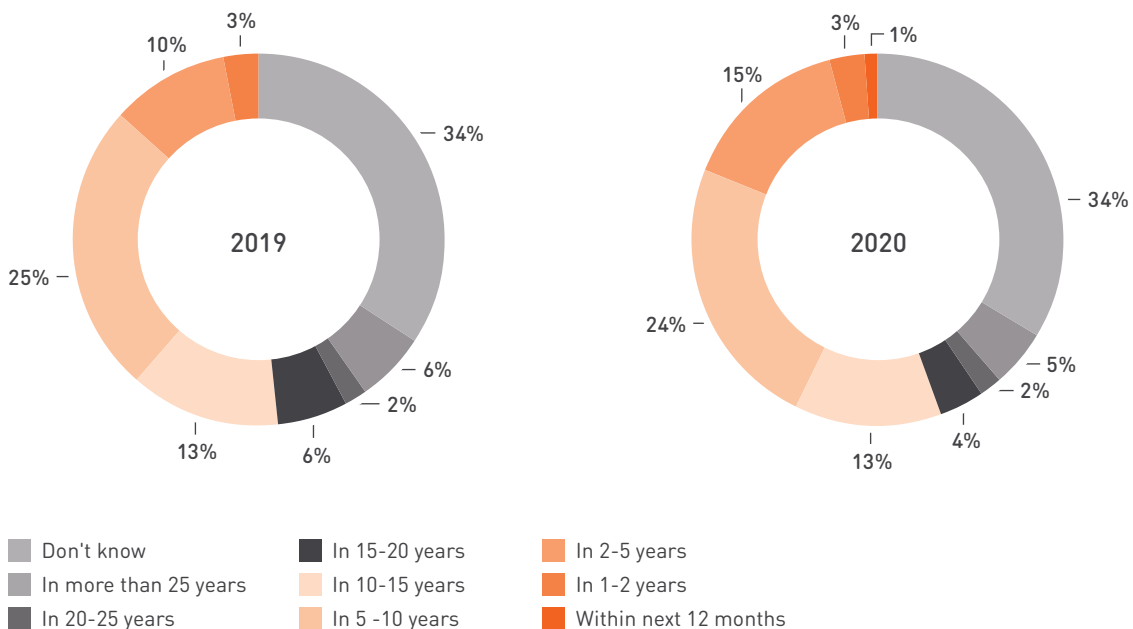
The Report also found that the typical motorist does not expect to buy their first electric car until the end of the current decade – though it is worth noting that the research was conducted prior to the UK Government announcing it would bring

forward the ban on the sale of new petrol and diesel cars and vans from 2040 to 2030.

There is support for the introduction of a government scrappage scheme for older vehicles to encourage the purchase of zero-emissions cars: 48% of drivers would back such an idea. At the same time, 43% say they would like the Government to commit to a national target for the roll-out of electric charge points.

When do drivers expect to opt for a battery electric (zero emissions) vehicle?

On average, drivers don't see themselves driving a pure electric car until 2030



375 miles

The minimum electric car range drivers say they want

What's stopping drivers opting for a battery electric vehicle?

Upfront cost remains the biggest barrier

- Strongly agree
- Slightly agree
- Slightly disagree
- Strongly disagree
- Don't know/no view

They're still too expensive



Manufacturers need to offer a wider variety of electric models first



I'd prefer to acquire a plug-in hybrid vehicle before I go fully electric



5.4

Motoring and the environment

The 2020 Report on Motoring asked motorists what steps they would be willing to take – or are already taking – to reduce their personal emissions' footprints. This year, **fewer drivers would be willing to swap their cars for bikes or e-scooters on short journeys** in order to cut their emissions: only 36% would be happy to do this, or are already doing this, compared with 39% last year.

As we have discussed in section 1.2, the pandemic has led to a greater feeling of importance attached to vehicles – in part due to fears of the infection risk linked

to public transport. Accordingly, there has been a sharp decline in the number of motorists who would be willing to give up using their vehicles altogether for environmental reasons: only 5% say they would consider this, compared with 14% last year.

Most drivers (52%) would, however, switch to an electric vehicle in order to reduce their emissions – provided the Government offered additional financial incentives for them to do so. But only 15% would make this switch without incentives, a sharp fall on 2019's 22%.





“An increasing proportion of motorists say they are making changes to help reduce emissions. It is encouraging that more motorists are switching off engines in traffic. In nose-to-tail traffic emissions from vehicles can increase fourfold. However, the pandemic will make it harder to reduce transport emissions if concern about using public transport continues due to social distancing.”

Claire Haigh, Chief Executive, Greener Journeys

Expert view

Encouragingly, a third (32%) would make more journeys on public transport for environmental reasons, or are already doing so – a figure that rises to 49% among London residents. And 48% support the idea of using park-and-ride schemes to a greater extent to avoid driving into town or city centres. Fewer people this year (21% versus 25% 12 months ago) say they would be willing to pay a charge to enter a city centre as part of a plan to improve air quality.

Almost half of drivers (48%) say they would be happy to switch off their engines more often while in traffic in order to cut emissions, while 16% are already taking this step – up from 10% last year.

Finally, while the overall **environmental impact of motoring is one of the top four concerns for 14% of drivers** – the same proportion as in 2019 – there has been a fall in the number of motorists who say they are worried about the impact of vehicle emissions on health. This year, only 10% say this is a concern, down from 12% last year – perhaps as a result of the general reduction of traffic levels in spring and early summer.

19%



expect their next car to be an ultra-low-emissions model

9%



expect their next car to be a battery electric model

Our work for drivers

Extra money for local roads

We have been consistently calling for extra money for local roads, so it was welcome that the Chancellor's Spending Review commits £1.1bn to local roads maintenance in 2021-22, including £500m to fix potholes and resurface roads. However, we believe this falls short of what is required to get local roads up to a reasonable condition, so we continue to call for a new funding settlement.

Better standards in the private parking sector

After successfully lobbying for greater regulation of the private parking sector and seeing a new Bill become law in 2019, we were pleased to see the draft Parking Code of Practice published this year. The draft code raises standards across the board and includes a clampdown on some of the more unfair practices employed by some private parking companies. The final code is likely to be published in winter 2020-21.

Safer smart motorways

The RAC 2019 Report on Motoring highlighted serious concerns among drivers about 'all lane running' smart motorways. The UK Government has since launched an evidence stocktake and published the outcome which now includes a commitment to create more refuge (SOS) areas, increase the number of highways traffic officers on smart motorways and a commitment to roll out technology that can detect broken-down vehicles more quickly. We will be monitoring progress carefully.

Fuel duty freeze

Following calls from the RAC that market volatility and higher pump prices would have a negative impact on road users and the economy, the UK Government announced in March 2020 that a planned fuel duty rise would be cancelled for this year.

**PARKING CHARGE
NOTICE**

**WARNING - UNAUTHORIZED
PERSONS MUST NOT REMOVE OR
INTERFERE WITH THIS TICKET**



Plug-in (electric) car grant extended

Having strongly urged the UK Government not to end the plug-in car grant as scheduled this year, we were pleased to see it being extended until 2022-23, though the amount will be cut to £3,000. While the extension was welcome, we fear cuts to the grant are likely to deter take-up of electrified vehicles as upfront cost remains a considerable barrier.

Online emissions look-up system

Following successive calls from the RAC, most recently in last year's Report on Motoring, the UK Government launched its online emissions look-up system for drivers so they can check if their vehicle is liable to be charged when entering a Clean Air Zone when these schemes are introduced in some cities in England in 2021. To make things clear for drivers, we continue to push for the data in the checker to be as accurate as possible.

Pavement parking review

In last year's Report, we called on the UK Government to tackle problematic pavement parking. The Government has launched a consultation into this looking at several options to reduce the impact of pavement parking. While we do not support an outright ban, we would like to see the Government publish guidance on how to tackle the worst cases of pavement parking, alongside local authorities being given additional enforcement powers.

Roads policing review

We have consistently raised concerns in recent years about the lack of progress in reducing road traffic collisions. This year the UK Government has taken action by publishing a 'call for evidence' into roads policing and the role that enforcement has in improving road safety.

Supporting drivers during the Covid-19 pandemic

The RAC maintained regular dialogue with the UK Government throughout the pandemic so we were able to continue providing our complete peace of mind breakdown cover safely to drivers. We encouraged the Government to provide a short, temporary MOT extension during the height of lockdown which benefitted many drivers who were self-isolating. In addition, we supported both the DVLA and DVSA's efforts to make more of their services available online by informing drivers that they could now renew or update their driving licences and book a driving test via the web.

During the first part of the 2020 Covid-19 pandemic, the RAC thanked NHS workers by providing free-of-charge breakdown assistance and half-price batteries – the most common breakdown at the time.

Our message to government

Road use

Driving in our towns and cities

The pandemic has given policymakers plenty to think about in terms of how we get around our towns and cities. We urge national and local governments to look at increasing the use of 'park and ride' facilities while also incorporating new forms of travel – such as the use of e-scooters and electric bikes. This would take into account the evidence from this year's Report that while drivers are still reliant on their vehicles, there is support for alternative transport for 'last mile' journeys in our towns and cities.

Following on from the rapid introduction of many new Low Traffic Neighbourhoods during the early stages of the Covid-19 lockdown, the RAC urges local authorities to consult more widely on changing road layouts in line with new government guidance and monitor the impact of schemes closely.

Greener forms of individual transport

The UK Government should consider increasing funding to local authorities to increase physical and permanent segregation between cycle lanes and motor vehicles. The RAC supports the legalisation of e-scooters for use on roads and cycle lanes only, subject to type approval and mandatory fitting of lights and speed limiters. It should also be mandated that e-scooter riders hold a valid driving licence, and the RAC would like riders to be encouraged to wear helmets and take out insurance.



Road conditions

Condition and maintenance of local roads

Despite reduced traffic volumes for a large part of the year the Report shows the condition and maintenance of local roads is drivers' top concern in 2020. The RAC continues to call on the UK Government to set out a long-term funding strategy for local roads under local authority control to improve and guarantee their condition into the future. There is support for this to be achieved by ring-fencing some funds from current fuel duty contributions. Over a five-year period the RAC believes this would secure £4.7bn.

Motorways and high-speed roads

This year's findings show an increased level of discontent with not only road surface condition, but roadside litter, signage and lane-marking visibility, and maintenance of roadside foliage. While Highways England is rightly focussed on upgrading the infrastructure of the strategic road network, we would like to see an internal review of existing maintenance practices to ensure they are as effective as possible. If any gaps are identified, these should be addressed as a matter of urgency.

Air quality

Encouraging take-up of electric vehicles

With the UK Government bringing forward the ban on the sale of new petrol and diesel vehicles to 2030, it is vital it explores ways to stimulate consumer take-up through incentives. This year's Report findings clearly show drivers are willing to switch to zero-emission alternatives with incentives, so we would urge the UK Government to look at enhancing the plug-in car grant or providing targeted local scrappage schemes for owners of older, more polluting vehicles.

Reducing emissions from idling engines

The Report shows willingness from drivers to change behaviour to reduce emissions, so we would urge local authorities to be more pro-active in encouraging drivers to switch their engines off when stationary, or to engage the stop-start feature if their vehicle has that technology.

Road safety

Speeding and average speed cameras

The RAC encourages the UK and devolved governments of Wales and Northern Ireland to follow Scotland's lead by widening the use of average-speed cameras from roadworks to motorway and major A-road stretches where there is a disproportionately high number of road traffic collisions.

Country roads

The RAC calls on local and national roads' authorities to conduct a widespread review of speed limits on 60mph country roads within their areas, and to lower the limits of those which have the worst road safety records.

Handheld mobile phone use

The RAC welcomes the UK Government's plans to finally close the loophole which prevents effective enforcement against those drivers using a handheld mobile phone for non-communication

purposes – such as taking a photo or a video – while driving. Once this has been implemented, we strongly encourage the UK Government to consider introducing new forms of camera-based enforcement technology to better tackle the illegal use of handheld mobile phones at the wheel. Such technology, which is already used elsewhere in the world, has the support of 79% of drivers in this year's Report.

Younger drivers

Younger drivers continue to be disproportionately represented in the road casualty statistics. We would encourage the UK Government to look at the learning process and strengthen this by considering adopting a form of graduated driver licensing, or – at the very least – introducing a statutory minimum learning period and a ban on intensive driving courses. The UK Government should support younger drivers by cutting the rate of Insurance Premium Tax levied on 'black box' telematics-based insurance products to encourage take-up as these policies are known to improve road safety.



Footage from a mobile phone enforcement camera from One Task

8

Drivers and their vehicles at a glance

Below is a summary of survey respondents' vehicles and usage:



Age of vehicles*

Motorists who own a car	%
Less than a year old	8
1-2 years old	8
2-3 years old	11
3-4 years old	14
Between 5 and 10 years old	34
More than 10 years old	23



Miles per year

Miles driven	%
5,000 miles or fewer	26
5,001-10,000 miles	35
10,001 miles or more	31



Number of cars per household

Households with	%
One car	50
Two cars	36
Three cars	9
Four cars	3
Five or more cars	1

Average number of cars	
In household	1.7
In ABC1 households	1.8

*Age of vehicle driven most often

HK



BUS STOP
City Thameslink
Station
towards Tottenham Court Rd
Holborn or King's Cross
8 46 521
N8 N25 N242

ribon

CORAL

City Thameslink
Station

JCDecaux

HM Government

NHS

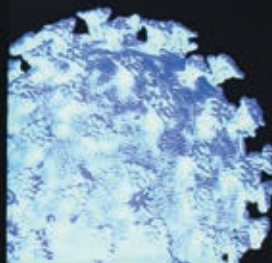
CORONAVIRUS STAY AT HOME SAVE LIVES



Anyone can spread Coronavirus.

The only reasons to leave home are:

- ✓ To shop for basic necessities or pick up medicine
- ✓ To travel to work when you absolutely cannot work from home
- ✓ To exercise once a day, alone or with members of your household
- ✗ Do not meet others, even friends or family



CORONAVIRUS
STAY HOME
PROTECT
THE NHS
SAVE LIVES

Research methodology

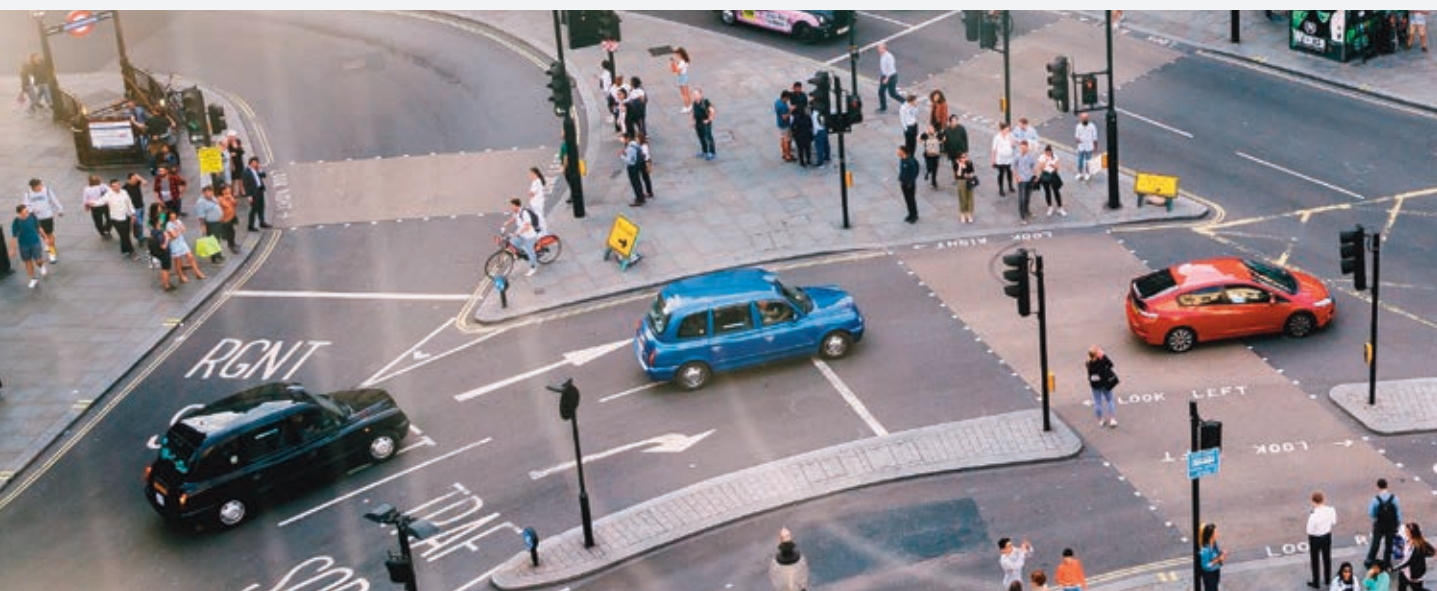
The RAC Report on Motoring 2020 is based on a large-scale online survey carried out by Online95 Limited on behalf of the RAC. In total, Online95 interviewed 3,068 UK motorists (i.e. those who hold a full, current driving licence, drive at least once a month and have a motor vehicle in their household).

The survey was conducted between 14 July and 4 August 2020, with the questionnaire taking around 30 minutes to complete. Quota targets were set, and responses were weighted to nationally representative UK motorists' age, gender, socio-economic groups, all UK regions, and car ownership (company car drivers vs. private car owners) profiles. The questionnaire and data in the Report were checked by our research partners Quadrangle.

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 opposite outlines the degree of statistical error broadly associated with an example sample size of 1,000, and the effective sample size of the weighted survey data, 2,912.



Sample size	Reported percentage at 95% level of confidence				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000	±1.86%	±2.48%	±2.84%	±3.04%	±3.10%
2,912	±1.09%	±1.45%	±1.66%	±1.78%	±1.82%

How to read the above table: Assume the reported percentage, with an effective sample base of 2,912, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.45%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with an effective sample size of 2,912 will produce a percentage of 23%, plus or minus 1.45%, or within the range of 21.55% and 24.45%.

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.



Company overview

With 12m 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.

In October 2020 it became the first roadside assistance company to provide a 'complete breakdown service as standard'[†] by offering 'rescue anywhere' cover with each of three brand new breakdown cover levels meaning customers don't have to upgrade to get home rescue. Furthermore, if a vehicle can't be fixed on the spot, all three products contain increasing levels of the vital breakdown features of towing and recovery, alternative transport and garage support to ensure customers get a complete service, whatever their budget and cover level.

The RAC was also 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. It 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. By the end of 2020 more than half of the RAC's van fleet will be equipped with this system.

In 2019 the RAC developed the first lightweight, mobile electric vehicle (EV) charger system capable of giving stranded out-of-charge EVs a power boost of up to 10 miles from a standard RAC patrol van. By the end of 2020 more than 70 RAC patrol vans will be equipped with EV Boost. Both EV Boost and the all-wheels-up recovery system were included in the RAC 4x4 HD patrol van which was launched to allow a wider range of vehicles to be recovered from a single breakdown 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.

[†]For new UK breakdown cover only. Excludes Arrival, Business Breakdown, European Cover and cover provided via corporate and insurance partners.

A young man with dark, curly hair and blue eyes is looking directly at the camera. He is wearing an orange high-visibility safety vest over a dark shirt. He is positioned in front of a car, with his hands resting on a large, dark tire. The background is a blurred garage or workshop setting with various tools and equipment visible.

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