



DRIVING INTO THE **FUTURE**

REPORT ON MOTORING 2021

RAC



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RAC Report on Motoring 2021

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Foreword

Dave Hobday, RAC Chief Executive

There can be no doubt that the past 18 months has been a period of extraordinary challenge for everybody. The pandemic has impacted virtually every person and business up and down the country and I am proud of the way colleagues at the RAC have collectively played their part in keeping the UK moving safely.

The pandemic has thrown up many changes to daily life, many of which are discussed in this year's Report on Motoring.

With fears around Covid transmission continuing to put people off using public transport, the car is now more essential than ever in enabling people to get around safely, conveniently and affordably. The Report also makes it clear that leisure travel by car will be greater, in the short term at least, due to the ongoing limitations around international travel.

While drivers feel having access to a car is even more important, our findings suggest there's going to be a change in the types of journeys we make. With an increased emphasis on flexible working, the tradition of commuting five days a week by car looks like it will come to an end as a growing proportion of drivers say they are likely to commute far less in their vehicles in the future. But with international travel still somewhat limited, leisure travel by car in the UK will be greater, in the short term at least.

Although driving habits have changed and are set to change even more, there is a consensus among politicians that now, more than ever, is the time to improve the environment and clean up our air. Our research shows that drivers want this too as concerns about the environmental impact of motoring have more than doubled since 2016. The number of drivers stating they will opt for a plug-in vehicle as their next car now surpasses those that plan to acquire a diesel – a finding that's supported by new pure electric car registration figures for 2021 already exceeding 50,000, even before the middle of the year.

As the UK's biggest breakdown company, we are leading the way in catering for the accelerating transition to electric cars, including by developing new equipment to ensure we are able to help EV drivers who encounter difficulties. RAC EV Boost is a unique lightweight, emergency charging system, which we have pioneered in partnership with a British engineering company, to give out-of-charge EVs

sufficient boost to reach a charging point. By the end of 2021, more than 200 RAC patrol vans will be equipped with this game-changing device. Alongside this, our unrivalled All Wheels Up rapid recovery system has been fitted to the majority of our vans enabling our patrols to safely tow EVs and other heavier vehicles, with all four wheels off the road, and without customers having to wait for a separate recovery truck, saving them valuable time.

We're also encouraging and stimulating EV take-up among consumers and fleet managers. By working with Hitachi Capital Vehicle Solutions we're enabling customers to lease some of the most popular models at market-leading prices, alongside offering everything they need to make the switch – from straightforward advice from our 'Electric Experts' helpline to getting a home charger installed, together with a highly competitive electricity tariff designed for EV drivers, thanks to our partnership with British Gas. This extends to our corporate partners where we're supporting fleets and OEMs with the transition, providing EV call centre support for drivers and dealerships, and specialist mobile high-voltage engineers.

In addition to the unprecedented pace of change in the automotive industry as it strives to move away from the internal combustion engine to zero-emission powertrains, the Report on Motoring also highlights a number of other important issues that urgently require the Government's attention. Sadly, there is still widespread dissatisfaction with the condition and maintenance of our local roads, alongside growing worries about the safety of our newest roads – all lane running smart motorways.

The RAC has a proud tradition of adapting to the challenges faced by drivers to give them complete peace of mind in their everyday motoring lives, but we are also extremely mindful of our role in highlighting both current and emerging issues in driving and mobility to those in positions who are able to address them and bring about positive change. I believe the findings in this year's Report do just that as they are thought-provoking, challenging and full of opportunity for those like RAC who embrace the changes ahead. I hope you agree.



What's on motorists' minds in 2021?

The poor condition and lack of maintenance of local roads is once again the top concern among Britain's drivers.

This year, 46% of drivers say that the state of local roads is one of their four most serious motoring-related concerns, sharply up from 38% 12 months ago. Indeed, the deterioration of local roads is by a considerable distance the biggest single problem facing drivers of all ages at present.





The dangerous, careless or illegal behaviour of other road users is another major issue for drivers. Three in 10 (31%) say that other drivers' use of handheld mobile phones at the wheel is a top concern, in line with the 32% recorded in 2020.

Some 27% say that the poor standard of other people's driving is a major concern, the same percentage as a year ago. And a quarter (25%) cite the aggressive behaviour of other drivers as a top concern. The Report explores these findings – as well as data on issues such as speeding and drink-driving – in greater depth in *The menaces on our roads* section 5, page 54.

The cost of fuel is also clearly on drivers' minds, with 25% saying it is a top concern, up from 21% in 2020, reflecting an upward trend in pump prices. Meanwhile, there has been a dramatic uptick in worries about the safety of the UK's growing smart motorway network: this year, 24% of drivers say this is a top concern, up from just 16% 12 months ago.

23%



of drivers aged 17 to 24 say the environmental impact of motoring is a top concern

Our in-depth research into drivers' views on the safety of all lane running smart motorways can be found in section 4, page 46.

Finally, 16% of drivers this year say that the environmental impact of motoring is a top concern: while this is a relatively low level in comparison with the issues highlighted above, it is the continuation of a trend over recent years that suggests it is of increasing concern to drivers. For younger drivers, this is a more significant issue: among those aged between 17 and 24, 23% say environmental impacts are a top concern while the rate is 19% for those aged between 25 and 44.

“Two issues leap off the page when it comes to drivers' concerns, one good, one bad: even though cycling has been hitting all-time highs during the Covid restrictions, motorists' worries about cyclists' behaviour are down; but the one that should concern policymakers is the leap in dissatisfaction with the state of local roads – particularly the road surface.”

Steve Gooding, Director, RAC Foundation

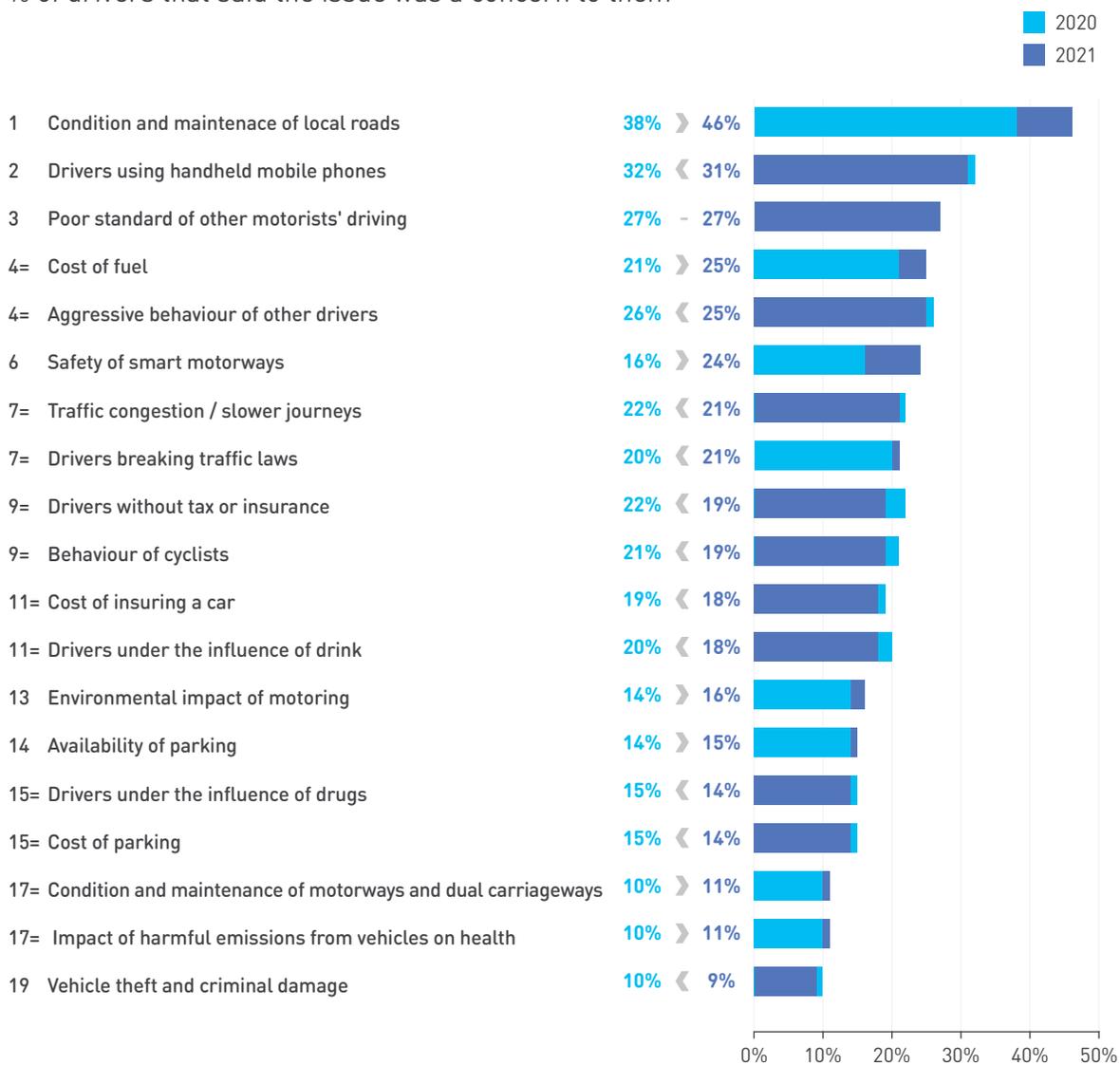
Expert view





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

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



1.1

The state of our roads

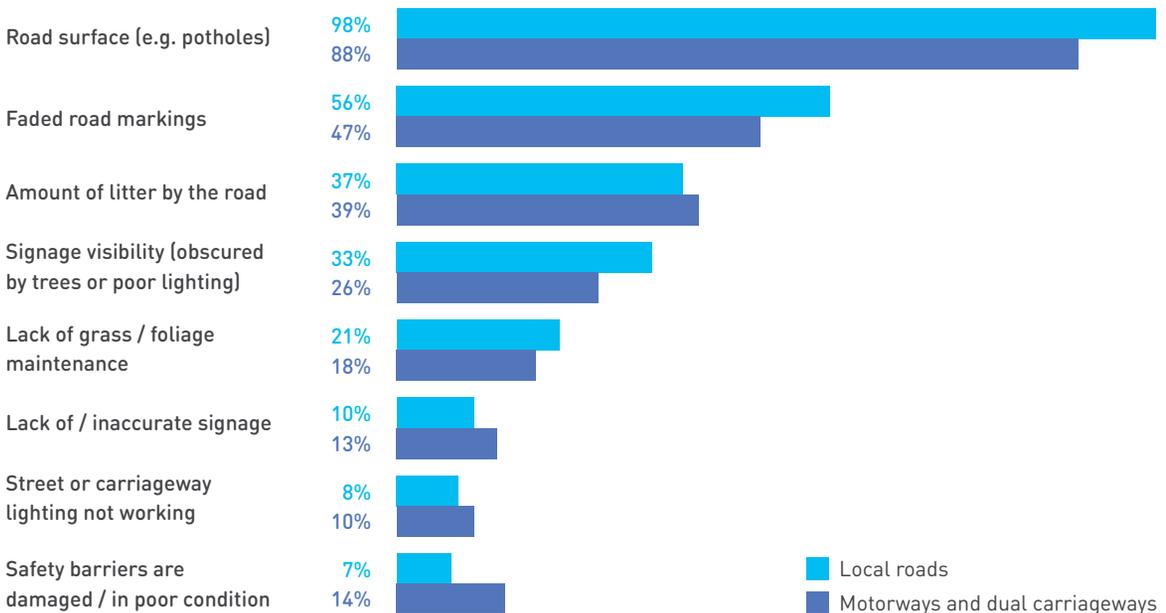
The Report provides further evidence that Britain's network of local roads continues to deteriorate in the face of inadequate maintenance investment and following harsh winter weather conditions.

Well over half (58%) of drivers believe local road conditions where they live have deteriorated over the past year, a rise on the 52% recorded in 2020 and 49% in 2019. While the state and maintenance of local roads is the top motoring concern

for all drivers, the issue is felt particularly keenly by older drivers: in the 65 and over age group, 54% say this is a top concern this year (46% among all drivers). But it is worth noting that the state of local roads is the top concern for drivers in every age group, according to the 2021 Report.

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

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





46%

say the state of local roads is a top concern to them, up from 38% last year

58%

say the standard of local roads has deteriorated over the last year

“ Year-on-year growth in concerns about litter on motorways is significant as well as the concerns about road surface quality. Highways England appear to have been slower in fixing issues during the pandemic, despite reduced traffic volumes.”

David Bizley, Former RAC Chief Engineer



Expert view

Local roads

Only 6% of drivers believe local roads have improved over the past year, the same proportion as 12 months ago and well down on the 11% reported in 2019. The vast majority who cite local roads as a concern point to problems with road surfaces as one of the main reasons (98%), while more than half (56%) complain of faded road markings. Other notable issues include the amount of litter by the road (a growing problem, as it is cited by 37% this year against 35% in 2020 and just 23% in 2019), signage visibility (33%) and lack of grass or foliage maintenance (21%).

The RAC's Pothole Index provides insight into the state of Britain's roads based on the proportion of patrol call-outs that are most likely to be related to pothole damage. Recent data from the Index¹ backs up the Report on Motoring's findings. In April, the RAC found that, despite the ongoing UK-wide pandemic lockdown, there had been a three-fold increase in the number of pothole-related breakdowns in the first three months of 2021 compared with the previous quarter – the sharpest quarterly rise ever recorded. Between January and the end of March this year, 2.4% of all call-outs were linked to pothole damage such as broken suspension springs, distorted wheels or damaged shock absorbers. This was the highest proportion recorded since 2017.

Long-term lack of investment

While the particularly cold and wet winter may have exacerbated the poor state of the roads, an ongoing lack of investment is undoubtedly the most significant problem. The most recent edition of the annual survey carried out by the Asphalt Industry Alliance (AIA) suggests that local authorities in England and Wales continue to lack the necessary funding to keep roads in good repair.

The AIA's 2021 Annual Local Authority Road Maintenance (ALARM) report² points out that, while there was an increase in highway maintenance budgets in the 2020-21 financial year, these were not sufficient to return budgets to their 2019 levels following swingeing cuts in 2020. The AIA estimates that more than £10 billion needs to be spent to address the backlog of maintenance on roads in England and Wales.

Motorists would very much like to see at least some of the revenues raised from the likes of Vehicle Excise Duty (VED) ('car tax') and fuel duty ring-fenced for spending on local road maintenance. This year, 81% of drivers support this idea, an almost identical proportion to 2020 (82%). At present, revenues from VED in England are used to fund maintenance spending but only on the motorway and high-speed road network.

1. www.rac.co.uk/drive/news/motoring-news/rac-records-sharpest-quarterly-rise-in-pothole-related-breakdowns-on-record/

2. www.asphaltuk.org/wp-content/uploads/ALARM-survey-2021-FINAL.pdf www.rac.co.uk/drive/advice/fuel-watch/

There is some limited support for the idea of paying a higher rate of fuel duty provided the extra revenue was ring-fenced for local road maintenance: 43% of drivers back this idea against 35% who oppose it. Overall, however, three-quarters (74%) of drivers take the view that the motoring taxes they already pay are not sufficiently reinvested into local roads.

Motorways and high-speed roads

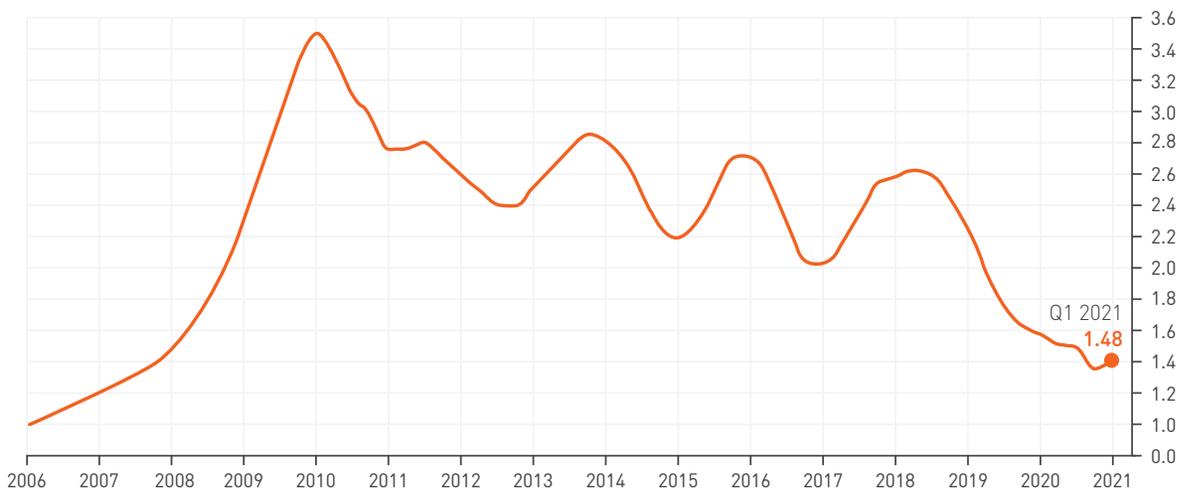
Drivers are on the whole happier with the state of the UK's motorways and major A-roads. Only 11% say that the state of motorways is a main concern, although 28% still say that the condition of these roads has deteriorated over the past 12 months.

While this is a substantially lower proportion than the 58% who think local roads have worsened since 2020, it should be noted that only 5% of drivers say the state of motorways and dual carriageways has improved.

For those drivers who say motorway and major road conditions have deteriorated, the biggest issues relate to the road surface itself (88%), faded lane markings (47%) and roadside litter (39%). As mentioned above, VED revenues in England are now used to fund spending on motorways and high-speed roads: 54% of motorists think this is a good idea against just 14% who oppose it.

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.

1.2

The cost of motoring

While the price of fuel has traditionally been among the issues of most concern to motorists, the pandemic appears to have reduced its overall importance. In 2021, a quarter (25%) of drivers say the cost of filling up is one of their top concerns, compared to 21% last year. This contrasts with 34% in 2019 and 29% a year earlier.

Since the first Covid-19 lockdown in March 2020, the UK government generally advised businesses to allow their staff to work from home where possible, thus reducing the number of commuting journeys and therefore expenditure on fuel.

The year-on-year rise in concern about the cost of fuel may also reflect the consistent increases in petrol and diesel prices over the past 12 months. Data from RAC Fuel Watch³ shows that while the average price for a litre of petrol fell to as little as 107p in spring 2020, by the time the 2021 survey was carried out the price was close to 130p.

In 2021, almost half of drivers (48%) say their actual expenditure on fuel over the past 12 months has fallen against 36% in 2020. And this year, just 27% say the amount they spend on petrol or diesel has increased, compared with 30% in 2020. By way of contrast, in 2019 two-thirds of drivers (67%) said their fuel expenditure had risen over the course of the previous year. Undoubtedly, the lockdown restrictions re-imposed around the UK in the first few months of 2021 played a major role here.

Older drivers are less concerned about fuel costs: only 15% of motorists aged 65 or older say the price of filling up is a top concern in 2021 compared with 31% of those aged between 25 and 44 and 30% of under-25s. This reflects the fact that older motorists do not have to make regular commuting journeys, and perhaps also their greater levels of financial security.

1 in 4 

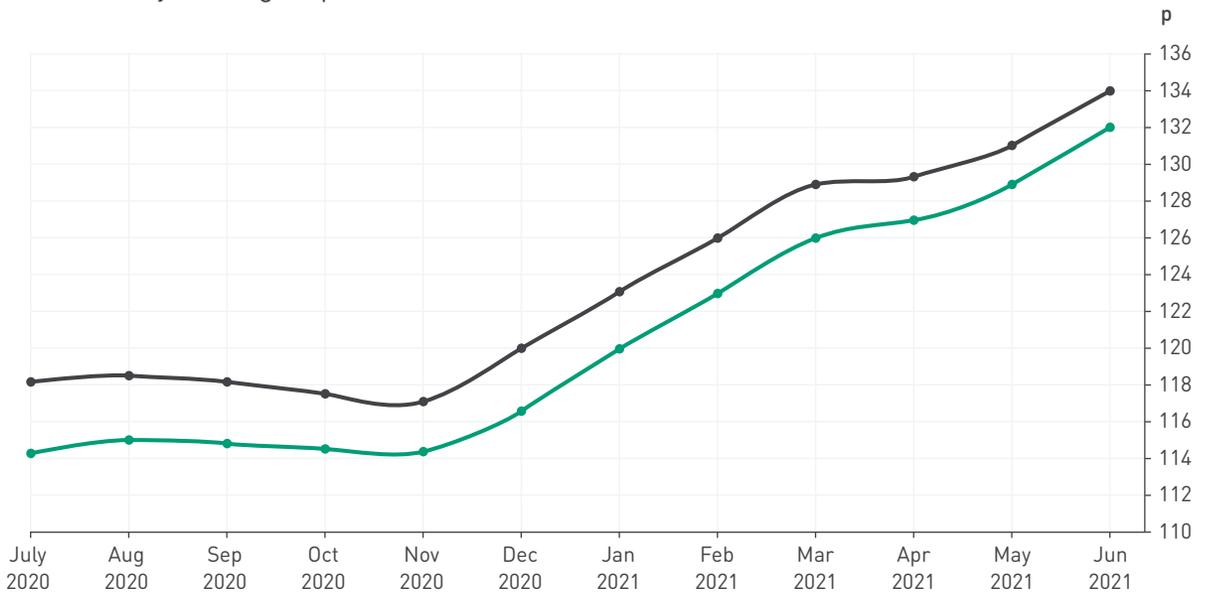
drivers say the cost of fuel is a top concern this year

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

How have fuel prices changed over the last 12 months?

After largely flat prices during summer 2020, the average cost of a litre of unleaded petrol sold at UK forecourts was 18p more in June 2021 – driven by a rising oil price.

■ Diesel
■ Unleaded



“ Drivers have become more concerned about the quality of local roads – which they have been using more during Covid restrictions. They have a solution: over 80% would like to see some of their motoring taxes ring-fenced for the maintenance of their local roads.”

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



Expert view

Insurance, maintenance and tax

While 44% of drivers say their insurance premiums have remained unchanged over the past 12 months, 35% say they are now paying more for cover – although this is down on the 44% recorded in 2020. Some 16% say insurance costs are lower this year – the highest proportion for more than six years. This is supported by the Association of British Insurers' motor insurance premium tracker which shows there was a £32 drop in the average policy cost in the first quarter of 2021 to £436, making for the lowest price seen in nearly five years⁴

Given that car usage has declined as a result of the pandemic, it is not surprising that more motorists are seeing premiums fall – although these figures suggest there may be scope for more customers to negotiate prices down by providing more accurate mileage figures to insurers.

A third of motorists (32%) say that their maintenance and repair costs have risen over the past 12 months, a fall on 2020's 38%. Meanwhile, 7% say these expenses have fallen compared with 4% last year.

Almost three in every 10 drivers (29%) say car tax bills have increased in 2021, the same rate as last year, but the majority (63%) report no change.

Pay-by-Mile Car Insurance:

In 2020 the RAC launched a brand-new type of car insurance product, specially designed for lower mileage drivers. Just pay a low monthly premium to insure a car while it's parked, then a few pennies for each mile driven.

4. www.abi.org.uk/news/news-articles/2021/04/record-quarterly-fall-in-the-cost-of-motor-insurance-according-to-the-abi/



£10bn

cost of addressing the road
maintenance backlog in England
and Wales, according to the AIA

Personal mobility and the pandemic

The Covid-19 pandemic has strengthened the bond between drivers and their cars, the 2021 Report on Motoring has found: now more than ever, drivers say they could not live without their vehicles, which highlights the central role the car will continue to play in so many people's lives. This is despite the fact car usage levels fell sharply¹ as a result of the lockdown measures imposed around the country over the past 18 months.





82% 

say they would find it difficult to adjust their lifestyle to being without a car, a higher proportion than ever before

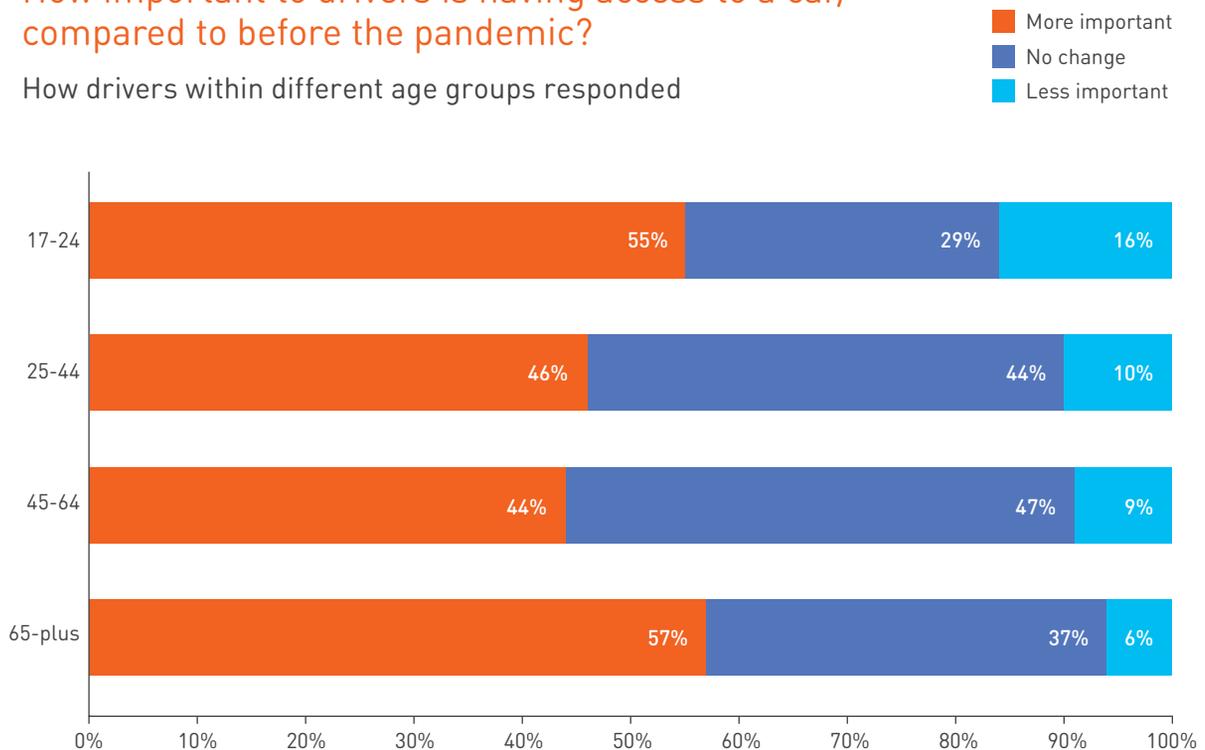
Looking to the post-pandemic future, it seems clear that hybrid working practices will lead to a permanent decline in the number of commuting journeys, although the findings suggest this reduction could be offset by a desire to make more leisure journeys at other times. Meanwhile, it appears the coronavirus pandemic may have a lasting effect on the willingness of drivers to use public transport, with most saying they wouldn't switch out of their cars even if services improved. Most drivers also say they enjoy driving.

Access to cars more important than ever

Only a small proportion of drivers (9%) think that having access to a vehicle has become less important as a result of the Covid-19 pandemic, the Report has found. Almost a third (31%) believe vehicle access is 'a lot more important' than it was pre-pandemic, while a further 18% say it is 'a little more important' – and drivers in the 17-24 and 65-plus age groups are much more likely to say they feel the importance of having access to a car has increased.

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

How drivers within different age groups responded



1. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/981967/road-traffic-estimates-in-great-britain-2020.pdf

“ The pandemic has undoubtedly increased people’s dependency on the private car. Changing work patterns as a result of flexible working are unlikely to diminish this car dependency but if we are to avoid serious congestion, it is equally important people are encouraged back on to public transport.”

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

Expert view



Today, drivers would find it harder than ever to cope without their cars: in 2021, 82% say they would find it difficult to adjust their lifestyle to being without a car – the highest level of agreement recorded on this issue in the history of the Report – a figure that rises to 87% for drivers who live in rural areas. In a similar vein, some 74% of drivers say they can’t imagine a day when they would no longer be able to drive their cars.

The reasons why the car remains the preferred option for many types of journeys varies depending on the purpose. For example, 71% say they use their car for commuting instead of alternatives because it’s quicker, with just over half (55%) saying there are no feasible public transport options. Meanwhile, for grocery shopping, the majority see the car as the most practical option – 78% use the car for most of these trips because of the amount they have to carry, while half (49%) tend to use the car as the distance they have to travel is too far to do on foot or by bike.

And a fifth of drivers (20%) usually combine trips for shopping, commuting or dropping off and picking up children as they believe these are more practical by car.

While many drivers may be commuting less in 2021 – and perhaps in the future as well (see below) – cars appear to have become an even more appealing mobility option as a result of concerns about the alternatives.

Looking at public transport in particular, 60% of drivers disagree with the statement ‘I think public transport is an attractive alternative to taking the car’, while only 21% agree.

42% 

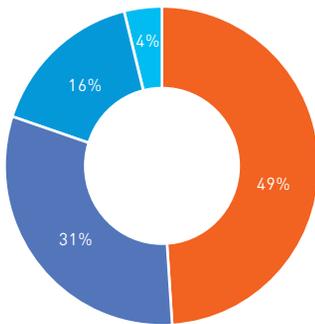
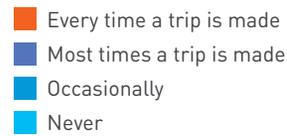
of drivers aged 17-24 say they’ll use their cars more in the future as a result of the pandemic

Attitudes towards public transport tend to be more negative in the North West, East and South East of England, as well as in Scotland. Meanwhile, a similar proportion (58%) agree that the pandemic has made them more wary of using buses, trains and trams in the future, given the potential infection risks. Notably, if the threat of coronavirus was removed, there would still be resistance to using public transport.

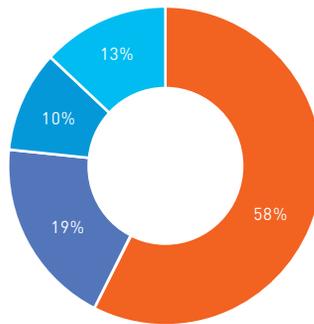
Only 46% of drivers say they would use their cars less in non-coronavirus circumstances – even if the quality of public transport was better. This is a significantly lower proportion than in the years leading up to the pandemic, when agreement with this proposition consistently ran between 54% and 59%.

How often is the car the transport mode of choice?

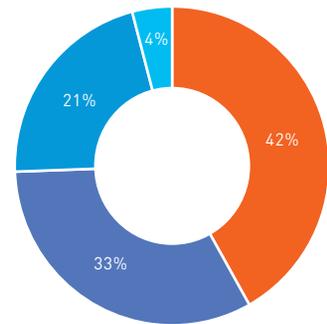
Daily car use on certain types of trips remains very strong



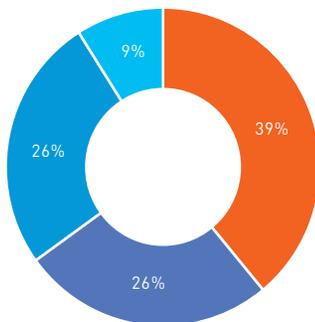
Main grocery / other essential shopping



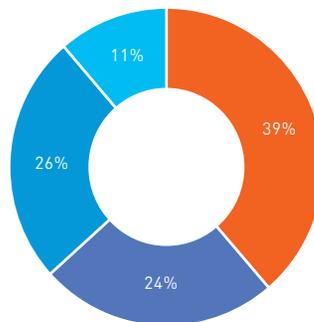
Commuting



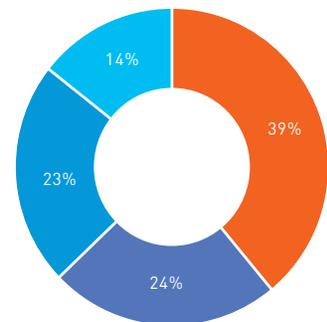
Visit family and friends



Transport of children*



Access healthcare services



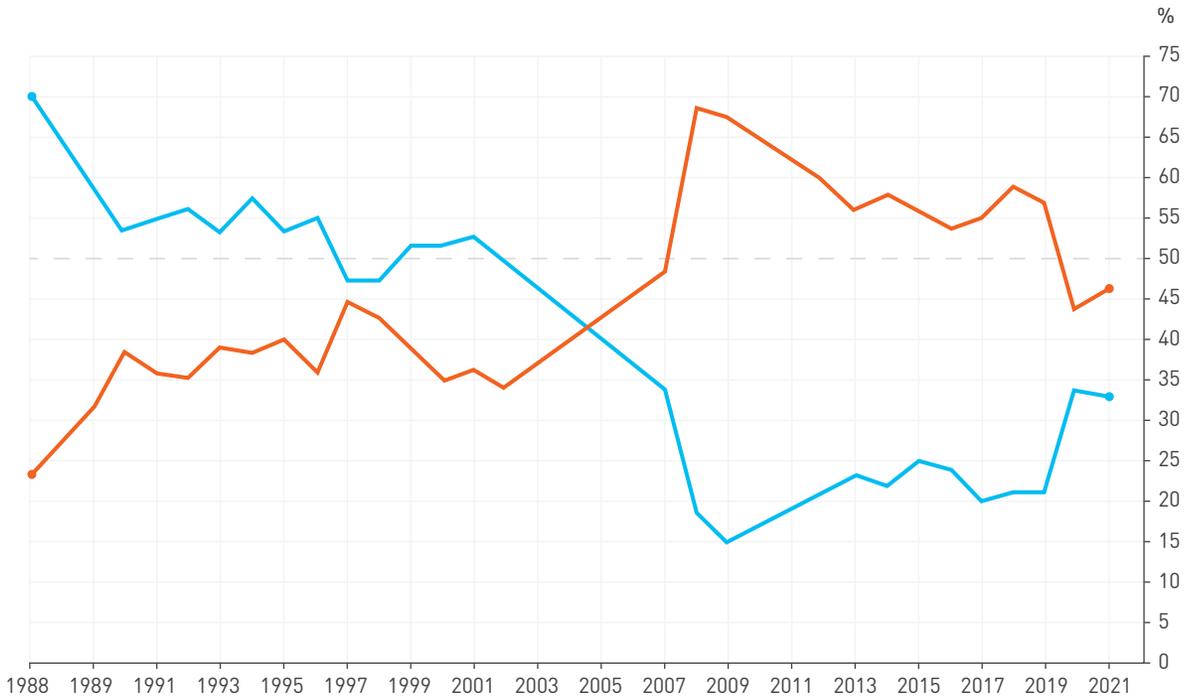
Access leisure services

*only of those drivers who transport children by any mode
 2. www.orr.gov.uk/search-news/rail-journeys-fall-lowest-annual-levels-1872
 3. www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic

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

In 2020, the proportion of drivers saying they would use public transport more frequently if it was better plunged to below 50% for the first time since 2008, and has not recovered in 2021.

■ % Agree
■ % Disagree



Such a finding suggests that policymakers face a considerable challenge in encouraging greater use of buses and trains in the years ahead following the sharp falls in usage seen during the pandemic.

According to the Office of Rail and Road², the number of passenger rail journeys made in 2020-21 declined by 78% on the previous 12 months to 388 million. However, estimates from the Department for Transport (DfT) suggest that rail usage had recovered to around 45% of pre-pandemic levels by the end of May 2021, by which point a number of major lockdown restrictions in the UK had been relaxed.

Meanwhile, DfT figures³ suggest that the number of bus journeys made in Britain in the 12 months from March 2020 was at 40% of 2019 levels (49% in London).

Complete peace of mind:

All RAC policies now come with home rescue, roadside assistance and garage support as standard – so there’s nothing missing from our breakdown cover.



Post-pandemic plans

This year's Report on Motoring has taken an in-depth look at the way drivers used different modes of transport prior to the arrival of Covid-19 in early 2020, as well as at how they predict this usage is likely to change after the pandemic.

A fifth (20%) say they expect to use their cars more in the future as a result of the pandemic, a figure which rockets to 42% among drivers aged between 17 and 24. In 87% of these cases, the reason for extra car usage is for leisure purposes, while half (53%) say they will also be more likely to use their cars for commuting to and from work.

While the number of people who work from home increased sharply during the pandemic as a result of lockdown restrictions and government guidance, there are signs that hybrid forms of working – where staff are expected to go into the workplace only a few days each week – could become a much more common practice in some sectors of the economy.

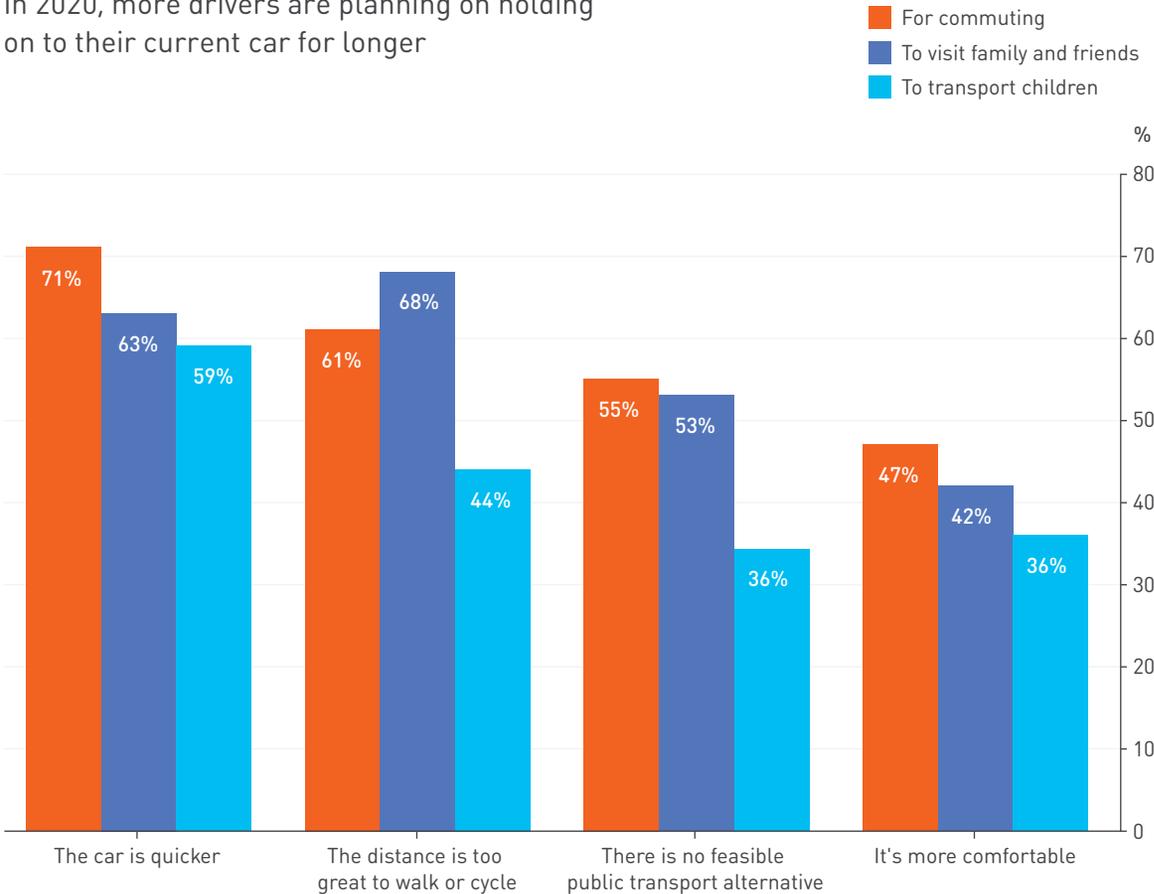
Research published in June 2021 by the Office for National Statistics⁴ found that 85% of individuals who were currently working from home wished to use this kind of hybrid approach on a permanent basis. Meanwhile, a quarter of employers (24%) said they intended to use increased levels of homeworking in the future.

The Report on Motoring shows that while 84% of drivers in employment said their main mode of transport to and from their place of work prior to the pandemic was their own car or a shared vehicle, this figure is expected to fall to 66% after the pandemic. This decline looks set to be caused almost entirely by a rise in working from home – indeed, 19% of drivers say they no longer expect to be travelling to their workplace after the pandemic.

The RAC’s research indicates that many employees believe they will indeed be taking a hybrid approach to attending their workplace in the wake of the pandemic: while half of employed motorists (49%) say they drove to work five days a week before the emergence of Covid-19, only 32% expect to do so in the future, pointing to a possible reduction in rush hour traffic in the future. Drivers in London think they will only commute two-and-a-half days each week on average after the pandemic.

Why do drivers use the car over alternatives?

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



4. www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/businessandindividualattitudestowardsthefutureofhomeworkinguk/apriltomay2021

Only a very small proportion of drivers – 5% – plan to get rid of a car in their household as a result of the pandemic or have indeed already done so.

Looking at planned post-pandemic public transport use – for all types of journeys, not just commuting – there seems likely to be a general decline in train and bus usage.

Prior to the pandemic, 16% of drivers used the national rail network at least once a month. After the pandemic, this figure is set to fall to 12% – although it should be noted that at present 18% of motorists remain unsure about how often they will travel by train in the future. In terms of bus travel, 21% of drivers made at least one bus journey a month in the year leading up to March 2020: this is expected to fall to 17% after the pandemic.

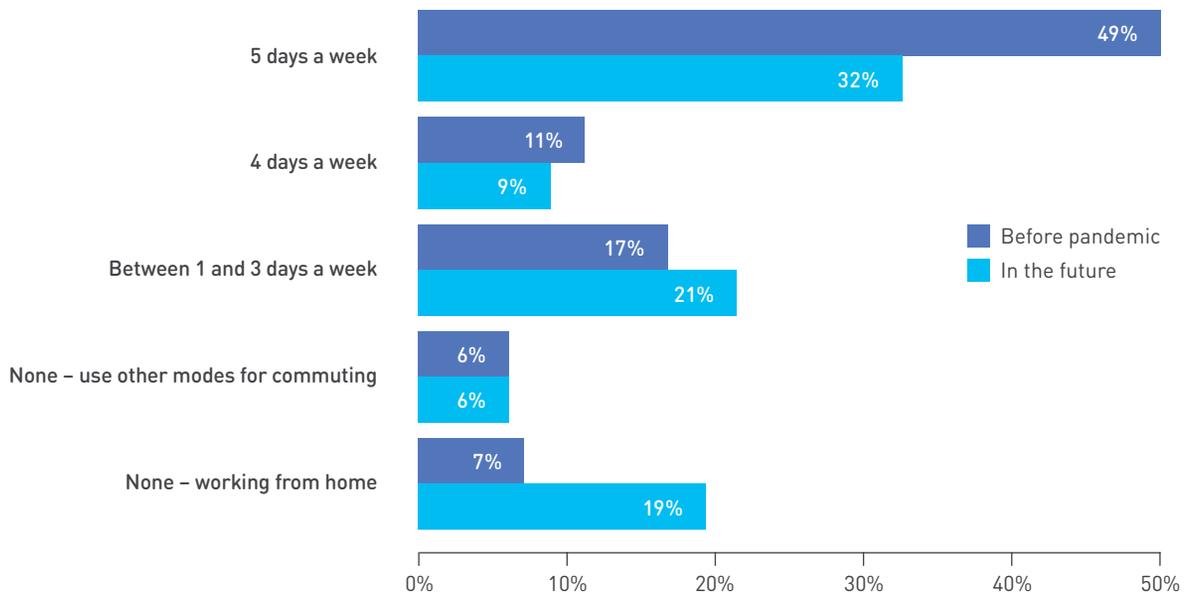
32% 

expect to commute by car five days a week in the future, down from 49% before the pandemic

Complete peace of mind:

In 2014, the RAC was the first breakdown organisation to roll out the universal spare wheel to assist drivers without a spare in their vehicle – giving complete peace of mind for those who damage a tyre on a pothole or for any other reason.

How many days a week were/will drivers use a car for commuting?





Wormwood Street

NEW SERIES
WATCH NOW

3 Streatham Station

HV33



JCDecaux



CORONAVIRUS
WEAR A FACE COVERING
ON THE BUS

“ The fact that the value of the car has shifted upwards suggests that we could well see a car-led recovery, with a corresponding increase in road transport emissions. At the same time, there have been major changes to how and why people travel. Whilst leisure trips are on the rise, the pandemic has seen a sharp decrease in single person car commuting as the result of an increase in working from home.”

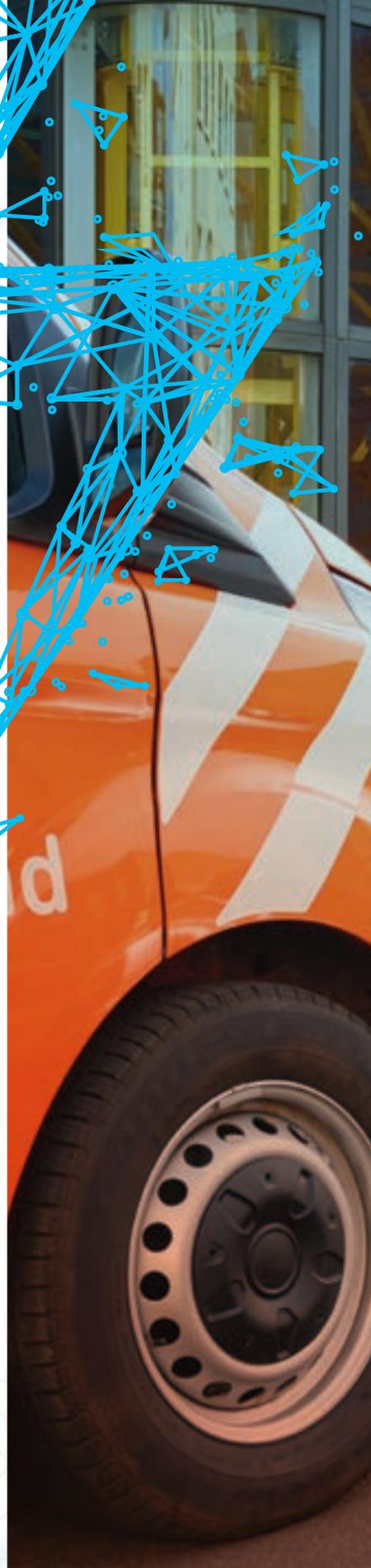
Claire Haigh, Chief Executive, Greener Transport Solutions

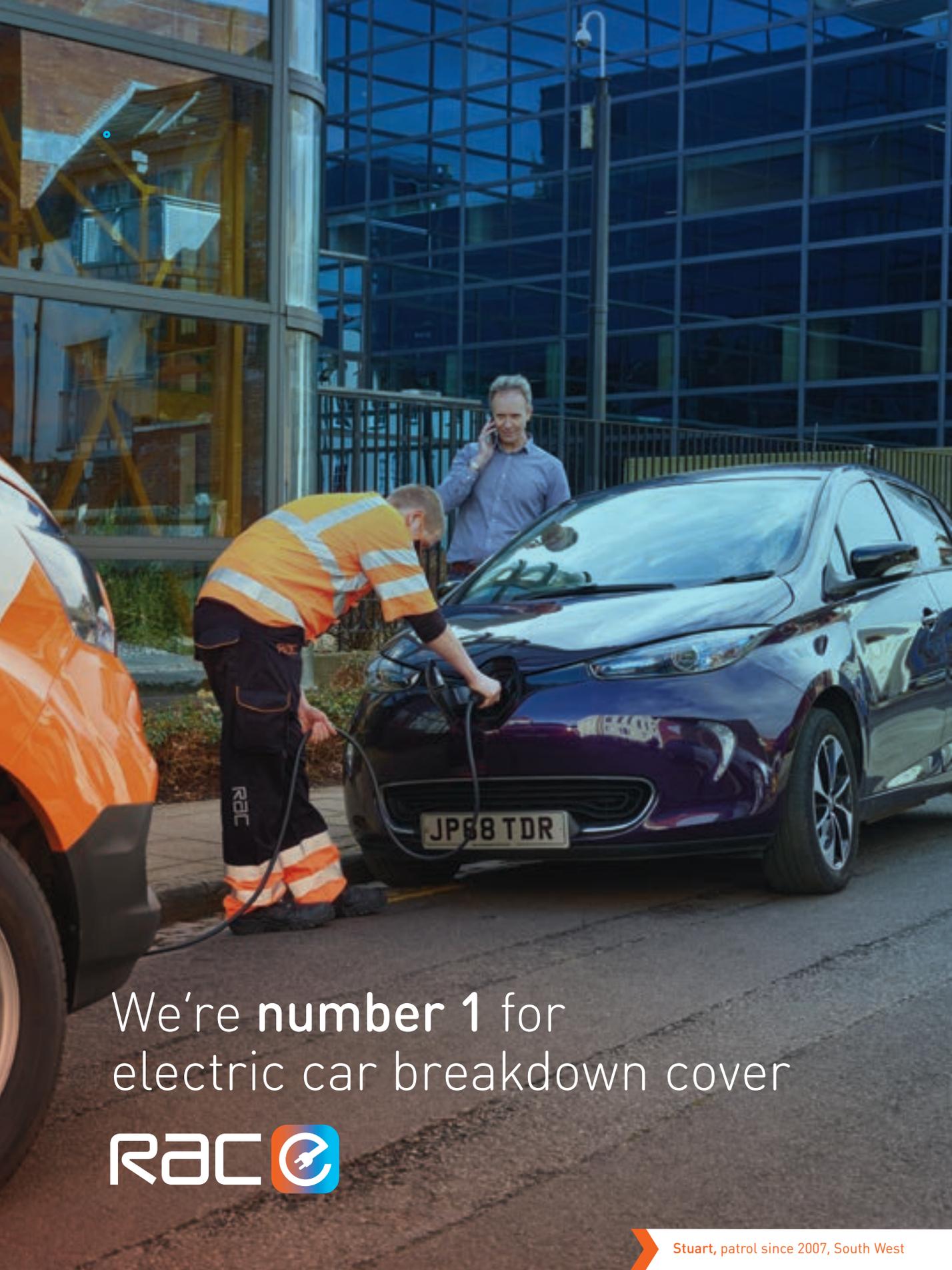


Expert view

The journey to electric

The 2021 Report on Motoring makes it clear that the appetite for choosing an electric vehicle is increasing steadily among UK drivers: 10% say their next car will be fully electric, up from 6% in 2019 and 9% in 2020. But there remain a number of obstacles, either perceived or real, to widespread take-up – from upfront costs to range anxiety and concerns about charging infrastructure.





We're **number 1** for
electric car breakdown cover



Decarbonisation of the UK's transport system is seen as a key step in the country's attempts to achieve its current ambition of net-zero carbon emissions by 2050. Indeed, the UK Government announced in November 2020 that new petrol and diesel cars and vans will no longer be sold after 2030¹, while a similar ban will extend to new hybrid vehicles from 2035.

Clearly, these policies can only succeed if Britain's drivers are willing and able to make the shift, en masse, to electric vehicles over the course of the coming decade. This year's Report examined drivers' attitudes to electric vehicles in detail, exploring the appeal of such cars to early adopters as well as the concerns expressed by a large number of drivers who own a conventional vehicle

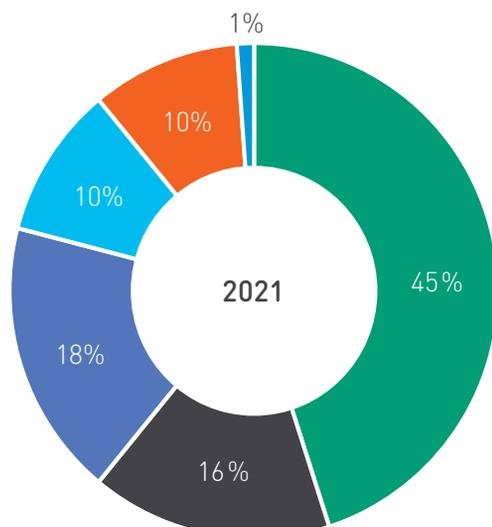
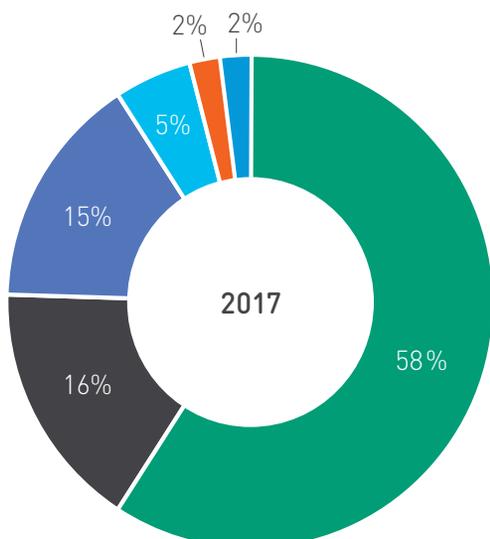
about issues such as affordability and convenience. Encouragingly, the Report's findings on the kind of journeys most commonly undertaken suggest that many people may be worrying unnecessarily about some perceived challenges associated with electric vehicles.

Given the emphasis placed by ministers and carmakers on the CASE (connected, autonomous, shared, electric) framework for vehicle development, it appears that the electric element is considerably nearer to mass adoption than autonomous/self-driving cars or shared vehicles. While the Government has recently announced plans to allow vehicles fitted with automated lane-keeping system (ALKS) technology to use UK roads², these fall well short of the introduction of fully autonomous vehicles.

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

The proportion of drivers who say they'll get a battery electric or plug-in hybrid car next has risen steadily since 2017

■ Petrol ■ Diesel ■ Conventional hybrid ■ Plug-in hybrid ■ Battery electric ■ Other



3.1

The choice of next vehicle

The next time they acquire a car, most drivers will still opt for a petrol or diesel model – although the proportion saying they will choose a conventionally fuelled vehicle has fallen steadily over the last few years.

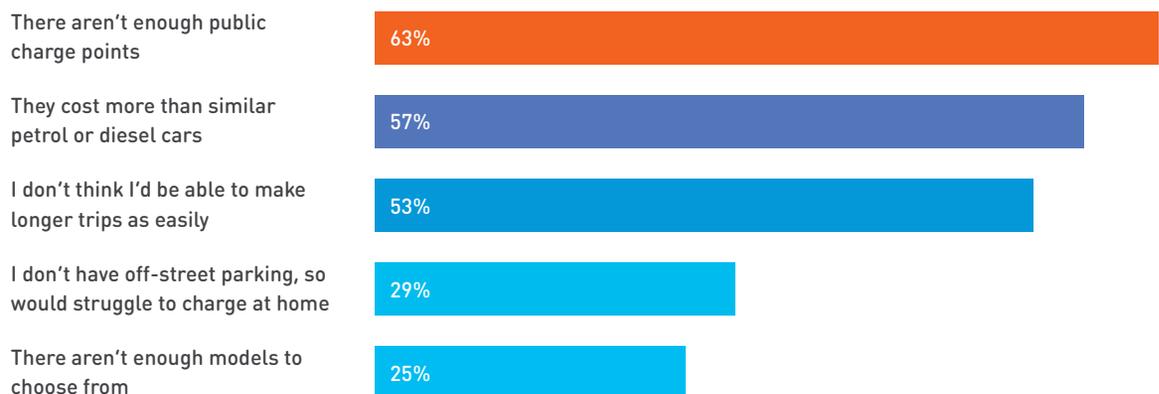
In 2021, 45% of drivers plan to buy a petrol car next – down from 58% in 2017, 52% in 2018 and 48% in 2019 – while just 16% intend to buy a diesel vehicle, which is in line with recent years' averages but much lower than several years ago. There has been a gradual increase in the popularity of both plug-in hybrids and pure electric (battery-powered) vehicles over the last

four years. This year, 10% of drivers plan to buy a plug-in hybrid next, and the same proportion (10%) intend to choose a pure electric car – the highest figure on record. Since 2017, the percentage of drivers who say they are going to buy a plug-in hybrid has doubled, while the number intending to buy a pure electric vehicle has increased five-fold.

A further 18% say they intend to buy a conventional hybrid next, but this option has gradually fallen in popularity since 2019, presumably as the availability of plug-in models has increased.

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

Concerns around cost and ability to be able to charge are the the biggest barriers



1. www.gov.uk/government/news/government-takes-historic-step-towards-net-zero-with-end-of-sale-of-ew-petrol-and-diesel-cars-by-2030
 2. www.gov.uk/government/news/government-paves-the-way-for-self-driving-vehicles-on-uk-roads

The journey to electric

The frequency with which drivers intend to replace their vehicles has declined in the past two years, perhaps as a result of the economic impact of the pandemic. At present, only 47% of drivers say they expect to change their current car within the next three years compared to 49% in 2020 and 57% in 2019.

Meanwhile, most drivers' next purchase is likely to be a used car – 51% say they will buy a second-hand vehicle against 25% who will buy a brand-new model (24% say they don't yet know). These figures may suggest a challenge for electric vehicle take-up, given that the market for used electric cars is still in its infancy.

Of those drivers who do not yet own a pure electric vehicle, only 17% say they expect to switch to such a car within the next five years – down from 19% in 2020. However, a large proportion of drivers (36%) admit they don't yet know when they will make the switch to electric.

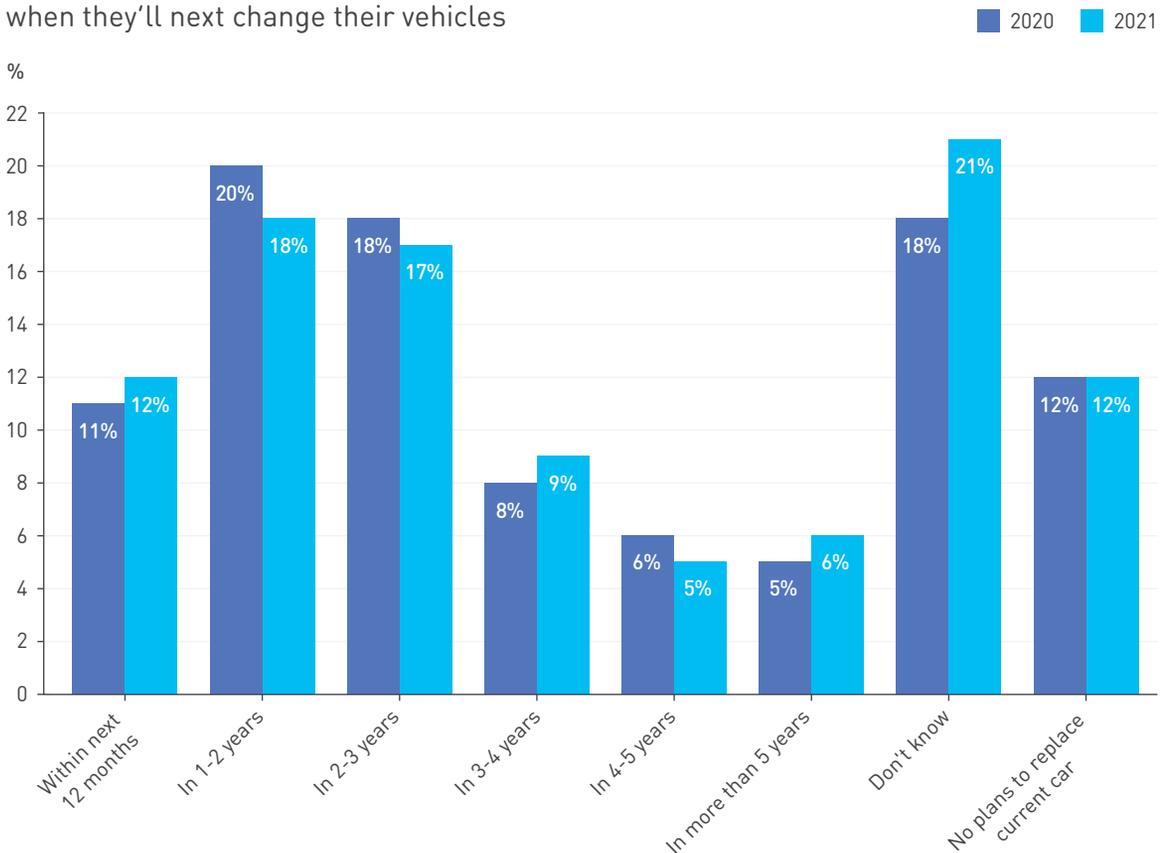
10%

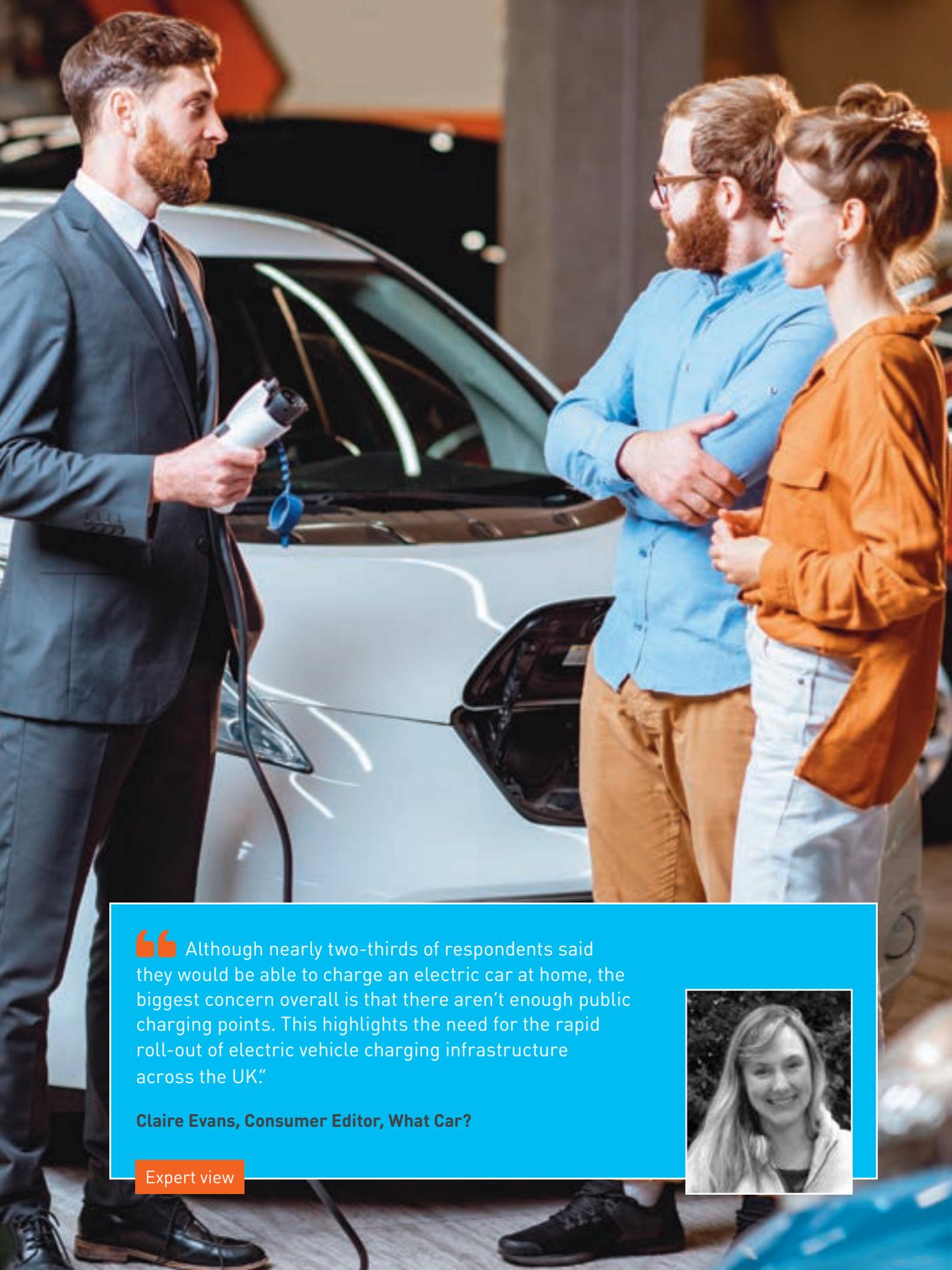


say their next car will be a battery electric, zero emissions model
- up from 6% in 2019

When do drivers next expect to change their vehicles?

2021 has seen a rise in the proportion of drivers who don't know when they'll next change their vehicles





“ Although nearly two-thirds of respondents said they would be able to charge an electric car at home, the biggest concern overall is that there aren't enough public charging points. This highlights the need for the rapid roll-out of electric vehicle charging infrastructure across the UK.”

Claire Evans, Consumer Editor, What Car?

Expert view



67% ⚡

of drivers who plan to get an electric car next say they'll do so so within the next five years



3.2

The pros and cons of electric cars

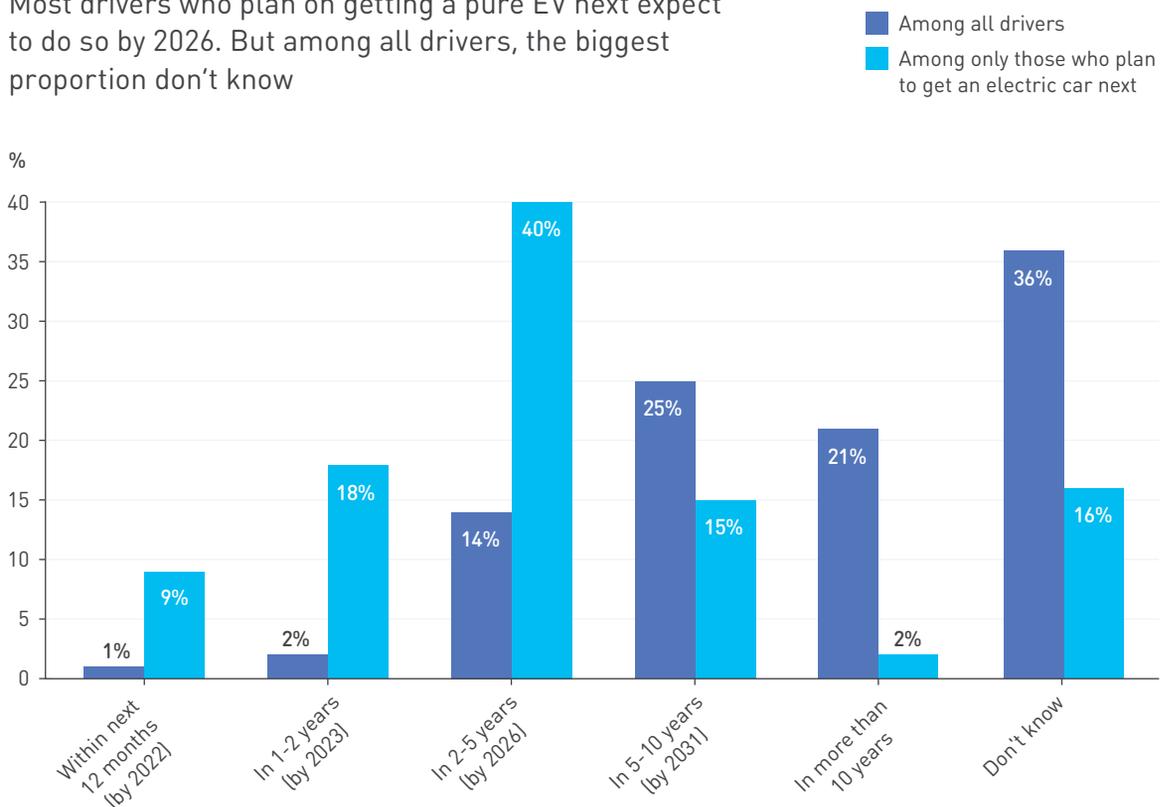
Among drivers who plan to buy a pure electric car as their next vehicle, environmental considerations are particularly important: 66% say they are concerned about the environmental impact of conventionally fuelled cars while 52% cite the impact of emissions on health.

Cost is also a significant factor: more than half (51%) say the price of electric cars is now reasonable and 35% point out that the running costs in terms of tax and fuel are lower than for conventional cars.

But the Report also looked at the reasons why 90% of drivers do not plan to opt for a pure electric vehicle as their next car. Chief among these is a perceived lack of public charging stations: 63% of drivers say this is a factor behind their decision not to acquire a pure electric car, although it should be noted that drivers who are able to charge their cars at home will effectively begin each day with the equivalent of a full tank.

When do drivers expect to get an electric car?

Most drivers who plan on getting a pure EV next expect to do so by 2026. But among all drivers, the biggest proportion don't know



“ I find it fascinating that 72% of drivers would prefer to charge at a forecourt, just as they would with a conventional car. It shows how many new habits drivers need to make as we switch to electric, because the beauty of ‘re-fuelling’ electric cars is that you can go and do something else while they are plugged in. This means it makes more sense to have high-power chargers at places like gyms, supermarkets and restaurants.”

Ginny Buckley, CEO & Founder, electrifying.com

Expert view



Meanwhile, the upfront price remains a sticking point for 57% of drivers, while 53% say they don't think they would be able to make long journeys as easily as with a conventionally fuelled car – an issue that is tied in with the perceived lack of fast and reliable charging infrastructure, despite UK government and Zap-Map figures showing a steady rise in public charging points³.

Almost four-in-10 drivers (38%) say they would be unable to charge a car at home – because they only have on-street parking or a parking space where they are unable to use a charger, or because they rent their home and may not be allowed to install a charging point. Meanwhile 24% are worried about the complexity of the charging process itself.

Looking specifically at the range of electric vehicles – the distance they can travel between charges – 44% of drivers say they would require a minimum range of 300 miles before they replaced their current car with an electric vehicle, with on average a range of 360 miles desired by drivers. However, the Report also found that 40% of drivers never make trips in excess of 200 miles in a single day, while a further 24% only make such trips once or twice in a typical year prior to the pandemic. Meanwhile almost eight in every 10 drivers (79%) say they would be unconcerned about making local journeys in an electric vehicle.

Taken together, these figures suggest that the range offered by the vast majority of electric cars available today could fit into many drivers' everyday lives with little difficulty – a classic case of the perception of living with an electric car being at clear odds with the reality.

3. www.gov.uk/government/statistics/electric-vehicle-charging-device-statistics-april-2021/electric-vehicle-charging-device-statistics-april-2021

66%



of drivers who plan to get an electric car next are doing so because of concerns about the environmental impact of petrol and diesel vehicles

In terms of charging infrastructure, 72% of drivers would want to charge their cars at a public forecourt similar to a petrol and diesel forecourt, while a similar proportion (73%) say it is important for them to be able to pay for charging using contactless methods. Two-thirds of drivers (65%) say it would be reasonable to wait for up to 20 minutes at a public charging station for a 100-mile charge, a finding which highlights the importance of introducing a comprehensive national network of ultra-high-speed 150kw charge points.

360 miles is the average range drivers say they want from an electric car - yet 40% never make trips of more than 200 miles in one day



3.3

Encouraging further take-up of electric cars

Clearly, the Government has a significant role to play in persuading and incentivising drivers to go electric. More than a third of drivers (35%) say there should be a state-backed scrappage scheme for older vehicles to encourage the purchase of zero-emissions cars, while 19% think the Government should abolish VAT on the purchase price of new electric cars.

A further 12% say the current plug-in car grant of up to £2,500 – a subsidy on new vehicles that cost no more than £35,000 – should be increased to £4,000. But the Report suggests that peer reviews and the influence of early adopters are also likely to have an impact: 55% of drivers say they would seek the opinion of a friend, relative or colleague who already owns an electric vehicle before making the decision to buy.



Looking at the current taxation system and how it might need to change to reflect an increase in the number of electric vehicles on the UK's roads, 54% of drivers think the Government should move away from charging duty on every litre of fuel. Meanwhile, 51% would be willing to pay taxes based on the number of miles driven as an alternative to other forms of motoring taxation such as fuel duty and/or Vehicle Excise Duty (or 'car tax').

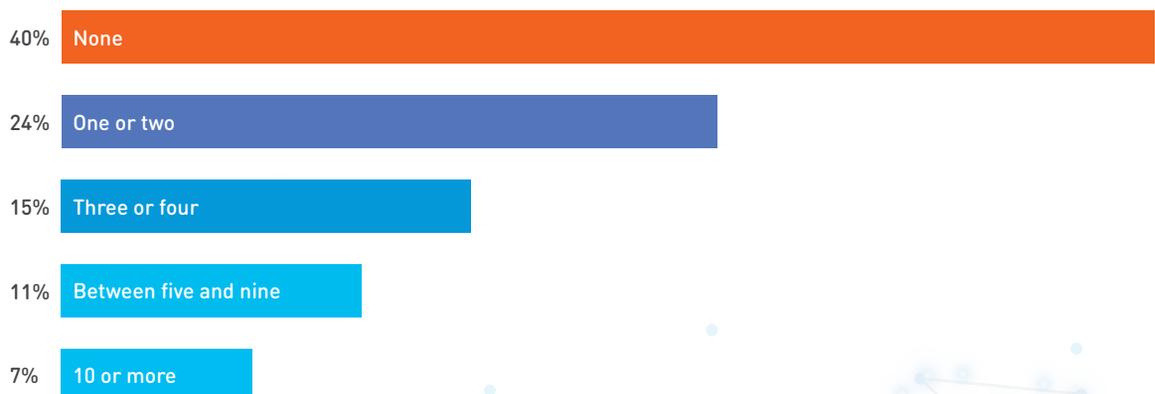
Finally, it should be noted that drivers broadly support the Government's plans to ban the sale of new petrol and diesel vehicles from 2030: 51% agree that this target is necessary to reduce road-transport emissions, while only 22% disagree with this policy.

72% 

would want to charge their cars at a public forecourt similar to a petrol and diesel forecourt

How many trips of over 200 miles did drivers make within the 12 months prior to the pandemic?

Electric cars could fit into many drivers lives easier than they might think - most drivers rarely, if ever, make long trips in a single day



Based on trips made before the coronavirus pandemic.

3.4

RAC – Powering the drive to electric

The RAC is committed to helping make the switch to electric vehicles as easy as possible for drivers.

While sales of new electric cars are accelerating at an unprecedented pace, there is still a way to go before an EV becomes the default choice for most drivers. In a bid to make it more affordable to choose electric we have launched our own EV leasing service, giving customers access to some of the most popular EVs at market-leading prices.

Customers can also come to us to get a home charging point installed and to take advantage of a specialist EV driver electricity tariff with cheaper off-peak charging. So, for the first time, a range of EV solutions are available to drivers from a single household brand – the RAC.

And we're ahead of the game when it comes to looking after the breakdown needs of EV drivers too. We've got the UK's first lightweight, emergency chargers fitted in our vans and our patrols can quickly and easily recover EVs with all four wheels off the road, without having to call out a separate flatbed, saving drivers time.

“ There are already over 25,000 public charge points available across the UK, with many more, including high speed rapid chargers, being installed monthly. Education, awareness and personal recommendations remain key to help drivers understand the practicalities of making the switch, as the data shows that once you have an EV the reality is much easier than expected!”

Melanie Shufflebotham, Co-Founder, Zap-Map

Expert view





CHARGE POD supplied by
originalADS
10152 | Ashham Business Park | Streetbury | UK | 014 430
01430 442222 | email: info@originalads.com
01430 442222

 On/Start
 Off/Stop

RAC



TECHNICAL INSTRUCTIONS
1. Start Patrol Vehicle engine
2. Connect charging lead to Charge Pod & fit
3. Press start button on Charge Pod
4. Charge EV for as long as required
5. Press Stop button on Charge Pod
6. Disconnect lead



HIGH VOLTAGE AND OUTPUT 230V 32A 14A





EV leasing

The RAC has joined forces with Hitachi Capital Vehicle Solutions to offer a wide range of the most popular EV models currently available in the market. At launch customers were able to lease an EV from as little as £227.99 a month.

Drivers using the new RAC leasing site can also select a service and maintenance plan so they can be even more certain of their costs. The top deals featured are based on in-stock vehicles meaning customers can have their new car delivered in just a few weeks. What's more, all the deals come with free breakdown cover, giving customers access to the RAC's industry-leading emergency charging and recovery equipment.



All Wheels Up

If an EV driver breaks down and can't be fixed by one of our expert patrols there and then, they can still help as our vans are equipped with our unique All-Wheels-Up rapid recovery system. As it's not advisable to tow an EV on two wheels, we have cleverly adapted the rapid deployment trailers fitted to RAC vans to be able to tow with four wheels off the road. This means an orange RAC van can rescue a broken-down EV – or for that matter cars with double punctures or transmission problems – without having to call out a separate recovery truck. It's like having a flatbed in the back of an RAC van.



EV Boost

EV Boost is unrivalled in the UK breakdown market. It's a lightweight, compact, van-mounted charger, developed with a British engineering company, to give an out-of-charge or severely depleted electric car enough charge to get it a short distance home or to a nearby working charge point. So, if an RAC customer in an EV should run out of charge on a journey or encounter an out-of-order charge point, we can help.

We're the only UK breakdown provider with this technology.



Expert advice on choosing an EV

To help encourage people to make the switch to electric motoring we have developed an EV hub on our website featuring advice articles and guides on choosing, charging and running an EV. We have also set up an RAC Electric Experts helpline – a phone number anyone can ring, RAC member or not – to have their EV questions answered.



Home charging & EV electricity tariff

The RAC has teamed up with British Gas to give new EV drivers everything they need for complete peace of mind zero-emission motoring. A smart 7kW home charge point can be fitted by a British Gas trained installer and customers can also take advantage of the bespoke RAC-e Recharge Electric Car Tariff which offers cheap off-peak overnight charging.

Having a home charge point on a competitively priced electricity tariff makes running an electric car much easier, cheaper and greener, by making use of excess renewable energy when demand is low overnight.

Find out more about all the RAC's services for electric drivers
rac.co.uk/electric-cars



There seems to be a growing acceptance by motorists that some form of 'usage charging' is inevitable - even amongst those who drive the most."

Theo de Pencier, Non-Executive Board Member, Transport Focus



Expert view



Smart motorways and driver safety

Changes to the UK's motorway network over recent years are causing increasing levels of disquiet among Britain's drivers, the 2021 Report on Motoring has found. Specifically, the introduction of 'all lane running' smart motorways – which sees the hard shoulder permanently converted into a running lane – has prompted a dramatic rise in safety concerns, to the extent that a clear majority of drivers now believe this policy should be reversed.





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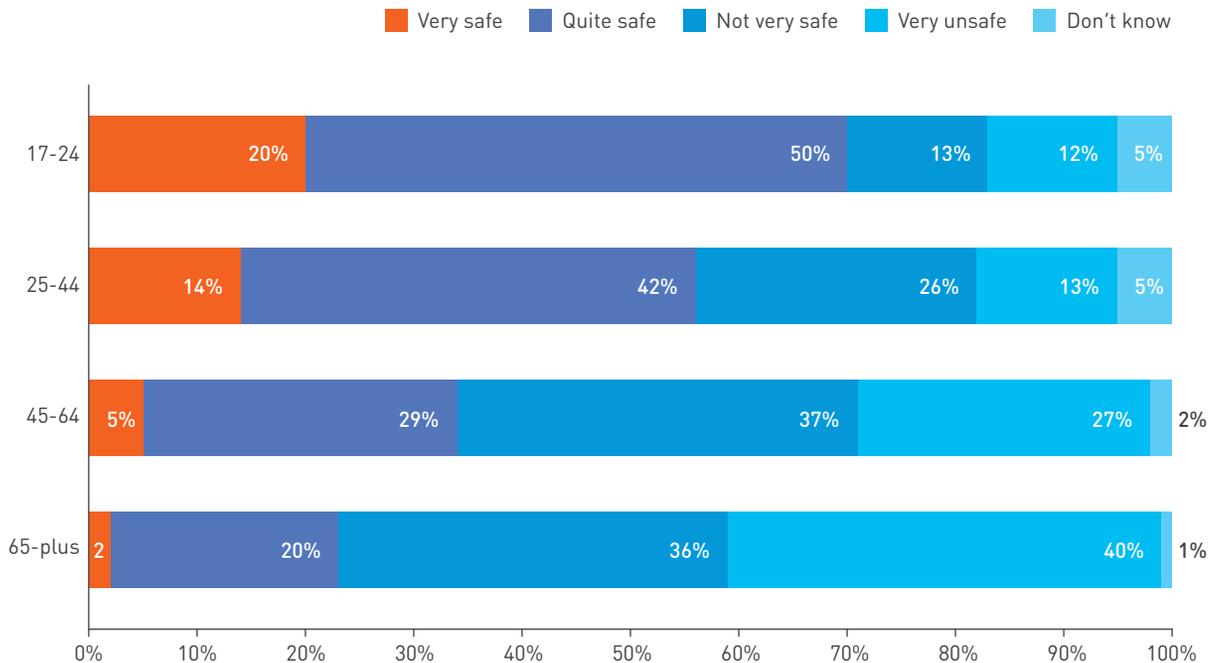
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What is all lane running?

All lane running motorways, which feature refuge areas no further than 1.6 miles (2.5km) apart with variable speed limits, speed cameras and variable message signs, are found across England on sections of the M25 as well as on the M3, M5, M6 and on stretches of the M1 with several other schemes currently under construction. Like other forms of smart motorway, these roads have been designed to increase capacity and reduce congestion on busy parts of the network without the need to build extra lanes, which in turn reduces time and cost compared to traditional widening.

But campaigners have highlighted the potential dangers of motorways which have no hard shoulder for vehicles which break down or which are involved in collisions. In 2020, the Department for Transport announced a £700m safety plan¹ following reports that 44 people had died on smart motorways since 2016. Work is continuing on new all lane running projects on the M1, M6 and M4 – but the Government clearly faces a significant challenge to convince drivers that such motorways are fit for purpose and safe to use.

By age: How safe do drivers feel on 'all lane running' smart motorways?



4.1

A growing concern

This year's Report indicates a sharp increase in safety concerns about smart motorways: 24% of drivers say this is one of their top motoring concerns, up from 16% in 2020 when this was first listed as an option. Smart motorway safety is a particular worry for older drivers: in the over-65 age group, 44% cite this as a top concern this year.

When looking at all lane running smart motorways specifically, most drivers (58%) say they have driven on a smart motorway of this type. But worryingly more than half of drivers of all ages (54%) who have experience of using them say they feel unsafe, with only 43% saying they feel safe.

The Report also asked drivers who had not driven on an all lane running stretch of road for their views on using a motorway that had no hard shoulder and with refuge points situated up to 1.6 miles apart: again, a majority (54%) said they thought they would feel unsafe based on the description given.

24%



say smart motorway safety is one of their top concerns, up from 16% in 2020

“The Government says that all lane running smart motorways are as safe or safer than conventional ones, but looking at these figures it would appear that many people remain to be convinced. The difference in attitudes among the generations suggests that perceptions towards the system will shift as older drivers – who have been used to the backstop of a hard shoulder for decades – become more accustomed to ALR. The roll-out of improvements such as stopped vehicle detection technology and the automatic enforcement of red-X contraventions must clearly proceed at pace.”

Graeme Paton, Transport Correspondent, The Times

Expert view



Fears over smart motorway safety correlate strongly with age. Three-quarters (76%) of drivers aged over 65 who have driven on an all lane running stretch of motorway say it made them feel unsafe. Indeed, most of this group (40% of the total) said they felt 'very unsafe'. Among drivers aged between 45 and 54, nearly two-thirds (64%) felt unsafe on all lane running smart motorways, with the proportion falling to 39% of those aged 25 to 44 and to just 25% of the under-25s.

These findings are echoed among motorists who have not yet driven on all lane running smart motorways: 76% of over-65s say they think the concept is unsafe compared with just 23% of under-25s. These stark age differences could reflect the fact that older drivers are generally more risk-averse – or

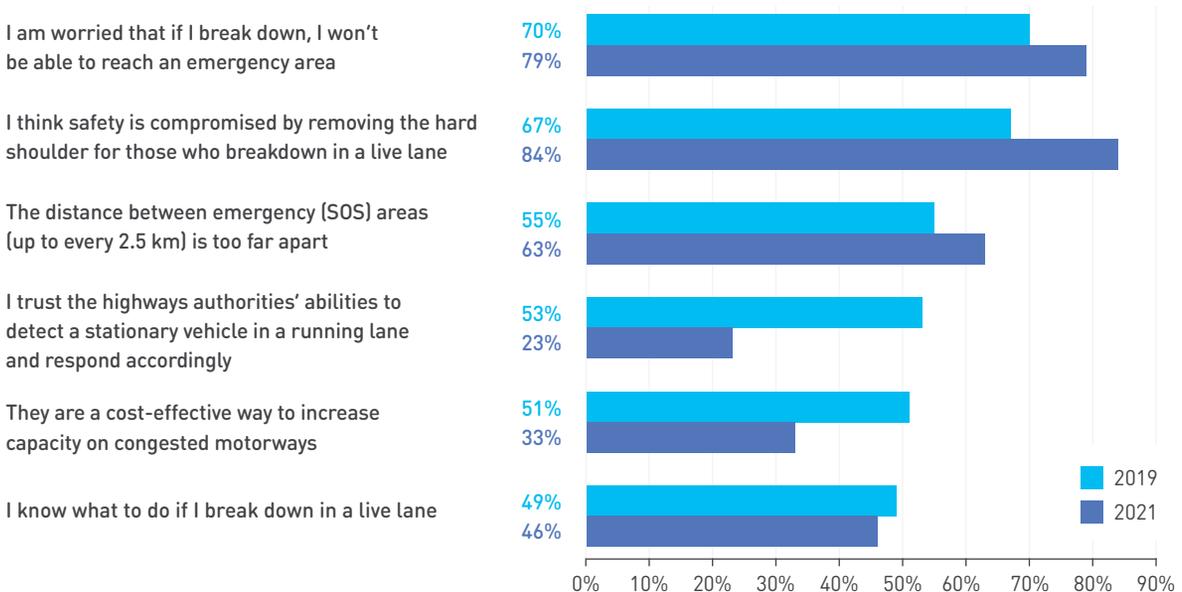
Assisting you on smart motorways:

The RAC will rescue drivers who breakdown on an all lane running smart motorway, whether the vehicle is in an SOS area or on the carriageway with the right protection in place from the highways authorities.

perhaps that they are more likely to have experienced a motorway breakdown or collision in their lives, and therefore recognise the potential safety benefits of having a hard shoulder.

Drivers thoughts on 'all lane running' smart motorways - 2021 vs 2019

% represents those that said they agreed with each statement



54% 

think the majority of motorists
obey red-X lane-closed signs



4.2

Time for a rethink?

Most drivers believe that all lane running smart motorways increase the dangers faced by motorists who break down in a live lane: 84% think that safety is compromised by the removal of the hard shoulder, up from 67% when drivers were last asked in 2019, while 64% say that the distance between refuge areas is typically too great, up from 55% in 2019. This year's figures clearly show a hardening of opinion on this type of smart motorway.

Meanwhile, 79% are worried that if they break down, they will be unable to reach an emergency refuge area. And, despite Highways England's 'Go Left' campaign introduced in 2020, less than half of drivers (45%) say they know what to do in the event of breaking down in a live lane.

The RAC's advice in such a situation for drivers who cannot reach a refuge area or the verge is to only exit the vehicle on the left-hand side if it is safe to do so, otherwise remain in their car with their seatbelt and hazard lights on and call 999.

54%



who have used these types of motorway say they feel unsafe on them

Aside from the safety aspect of mechanical failure on all lane running motorways, 85% of drivers believe that a vehicle that breaks down in a live lane will lead to an increase in congestion.

Drivers lack confidence in the authorities' ability to respond to live-lane breakdowns or incidents. Just 30% of motorists say they trust Highways England's abilities to detect a stationary vehicle in a running lane and react accordingly, while only 54% think that the majority of drivers obey red-X lane-closed signs which are used to keep traffic out of lanes where a breakdown or other incident has occurred, down from 60% in 2019. Separate RAC research² carried out in 2019 revealed that a nearly a quarter (23%) of drivers had admitted to ignoring the red-X lane-closed sign and although some enforcement is now taking place, full enforcement on the all lane running network is unlikely until 2022.

Overall, most drivers (63%) do not believe that the various measures being implemented by Highways England to compensate for the removal of the hard shoulder are adequate. These include variable speed limits in response to incidents or to control traffic flow, lane-closed signs, and technology to detect slowing or stationary vehicles.

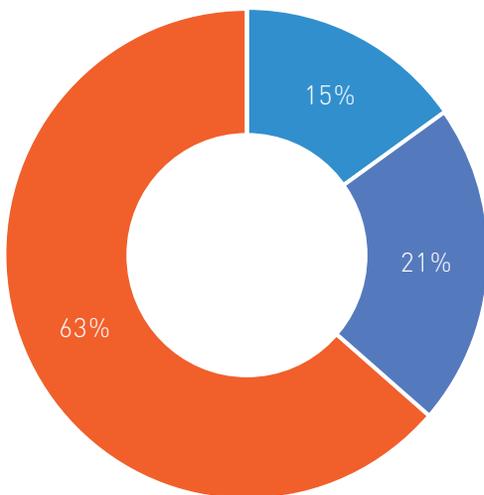
Given these serious misgivings, therefore, it is hardly surprising that a clear majority of drivers (62%) think that all lane running schemes should be scrapped entirely and the hard shoulder reinstated, while retaining the technology that has already been installed to manage traffic flows and detect breakdowns – a sentiment shared by drivers of all ages.

Only a quarter of drivers (24%) support the continuation of current government policy, which is to stick with four lanes and no hard shoulder, but with an increase in the number of refuge areas and extra technology to detect stationary vehicles – as well as cameras to catch motorists who ignore lane-closed signs. While there is greater support for scrapping all lane running across all age groups, it is highest among the over-65s (78%).

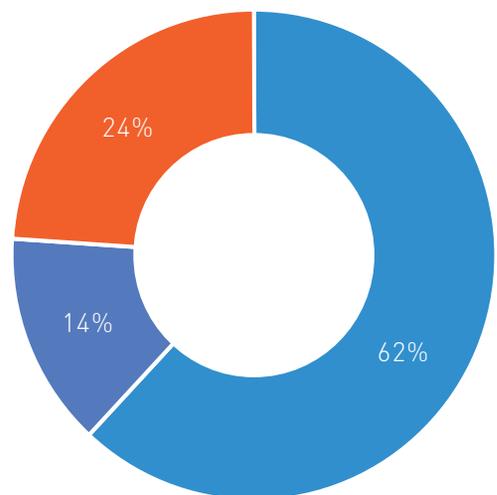


Drivers' thoughts on the future of 'all lane running' smart motorway schemes

- Yes
- Don't know
- No



Do you feel the new safety measures in place or planned adequately compensate for the permanent removal of the hard shoulder?



Should the Government scrap these schemes and reintroduce hard shoulders with three running lanes, but keep the already implemented technology?

The menaces on our roads

The reckless, careless or illegal actions of other motorists are among the biggest concerns for UK drivers, this year's Report on Motoring has found. The use of handheld mobile phones at the wheel, the poor standard of other people's driving and the aggressive behaviour of other road users are three of the five most widespread concerns in 2021.

Meanwhile, more drivers admitted to speeding this year on all roads other than motorways than did so in 2020. This is arguably a result of the lighter traffic volumes brought about by national lockdown restrictions tempting some drivers to break the law.





5.1

Handheld mobile phones

The use of handheld mobile phones while at the wheel is a top concern for three in 10 drivers (31%) this year. This figure is in line with the 32% recorded in 2020 but below the recent medium-term average: in 2019, for example, the rate was 36% and it was 38% a year earlier. With drivers spending less time on the roads as a result of the pandemic, however, it is not surprising that concern in this area has fallen to some extent.

Handheld phone use is a bigger issue for older drivers: 35% of those aged between 45 and 54, and 39% of the over-65s say it is a top concern.

The Report also asked drivers how much they themselves use handheld mobile phones at the wheel. As has been the case in previous years, a clear majority of motorists (73% in 2021) say they never make or receive calls when driving, while 59% never use their phone for calls while



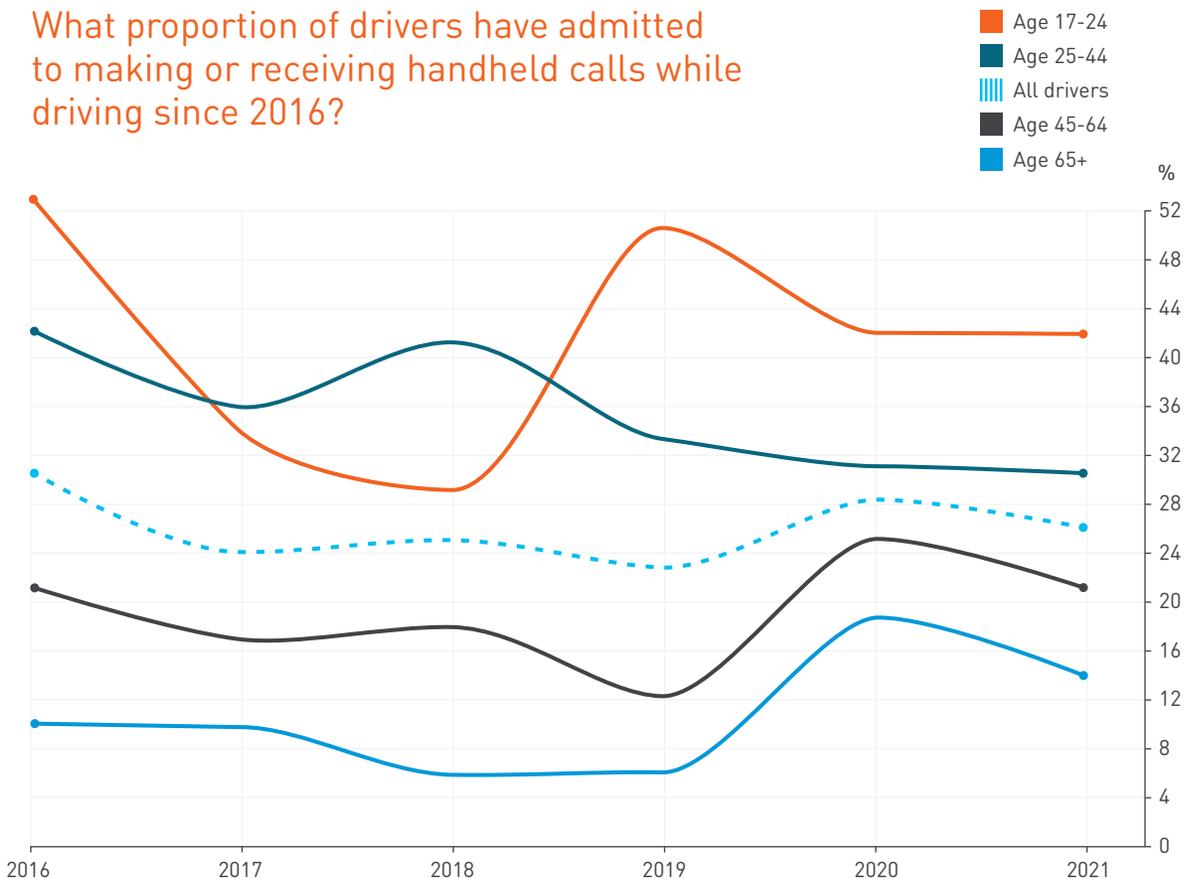
stationary with the engine on. However, a small minority continue to use their phones despite the risks, not to mention the consequences of being caught engaging in such illegal behaviour – in 2021, the proportion of motorists who use handheld phones for calls while driving at least occasionally is still 26%, although this is down on the 29% recorded last year.

Meanwhile, there has been a slight but welcome decline in the percentage of drivers who send messages while driving: just 8% admit to such behaviour this year compared with 9% in 2020 and 14% in 2019, while 13% say they at

31% 
 say drivers' use of handheld phones is a top concern

least occasionally check texts or other messages while driving, though this is the lowest rate in five years. Worryingly however, 7% of motorists say they have taken a photo or filmed a video with their phone while driving – the same proportion as seen last year.

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



Significant age differences

When we look at handheld mobile phone usage by age, a more striking picture emerges. Younger drivers are considerably more likely to admit to using their phones while at the wheel: a huge 43% of those under 25 say they at least occasionally use a handheld phone to make or receive calls while driving compared with 26% of all drivers and just 14% of over-65s. In terms of calls taken or made while stationary with the engine on, 54% of under-25s say they have done so versus 29% of over-65s.

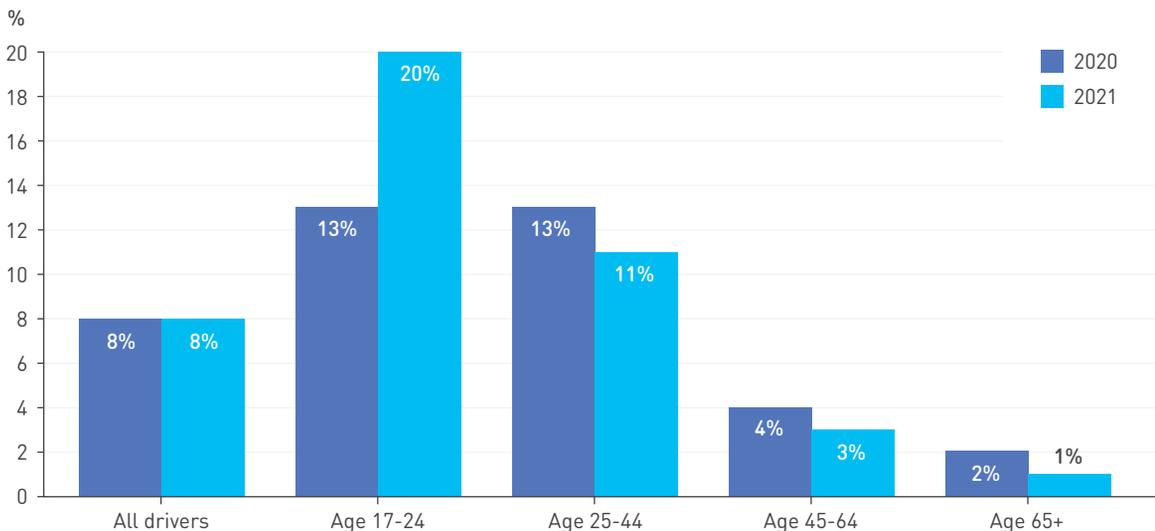
A third of drivers aged between 17 and 44 (34%) have sent messages while stationary in a vehicle compared with 13% of over-65s, while 12% of the former age group has messaged while driving (1% among over-65s). Perhaps most shockingly, a fifth of under-25s (21%)

admit to having made or received a video call while driving at least occasionally in the past year – three percentage points more than those who said this last year. Across all age groups, the average is 8%. However, it should be noted that the proportion of under-25s engaging in many kinds of handheld phone use while driving has still fallen in the last two years. For example, 43% of this age group made or received calls while driving this year compared with 51% in 2019; and 24% have checked messages while driving in 2021 against 35% in 2019.

1 in 5 

under 25s admit to video calling while driving in 2021

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





44% 

admit to speeding on 60mph roads,
up from 33% last year

“ It’s reassuring to see a reduction of in-vehicle texting. Hopefully the increase in awareness as to the dangers and penalties of this practice are leading to this reduction. Technology may also be playing a part as more vehicles are equipped with connectivity technology that allows safe communication.”

**Matthew Avery, Director of Insurance Research,
Thatcham Research**



Expert view

5.2

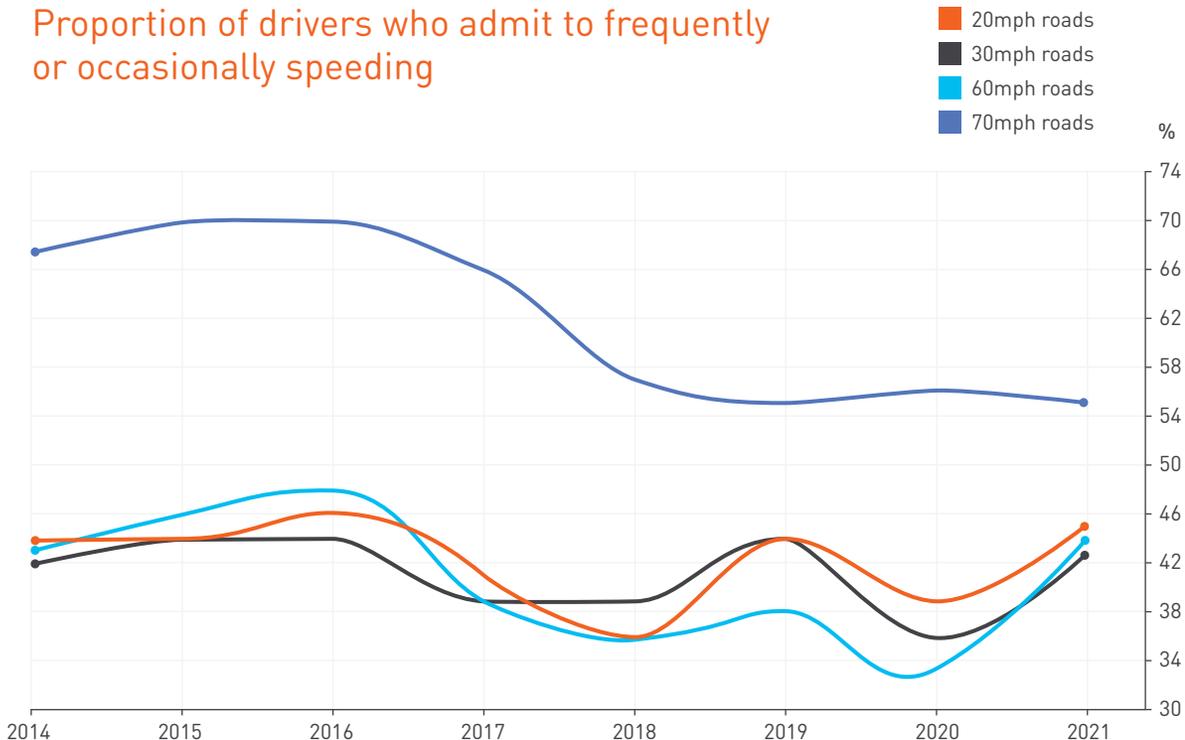
Reported speeding on the rise

Compliance with speed limits on most types of roads has worsened in 2021, the Report has found. On both 60mph and 20mph roads, the number of drivers who admit to exceeding the limit at least occasionally is at its highest level since 2016 – 44% and 45% respectively. On 30mph roads, 41% of motorists admit to speeding, up from 36% last year. As in previous years, speeding is most likely to occur on motorways, although here compliance has improved very slightly, with 55% of drivers saying they have exceeded the 70mph limit compared with 56% in 2020.

The Report asked drivers to give specific reasons for breaking speed limits on different types of roads. On motorways, the most common justification – offered by 40% of drivers – is that they are driving according to the speed of others.

A third (33%) say they have broken the motorway speed limit because they think it is sometimes safe to do so, while a similar proportion (32%) say it is because there are very few other vehicles on the road.

Proportion of drivers who admit to frequently or occasionally speeding



33%



say they have broken the motorway speed limit because they think it is sometimes safe to do so

A low number of vehicles is the most common reason given for breaking 60mph speed limits (34%), while on 30mph roads, 34% of drivers say the limit is often inappropriate for the type of road (up from 30% last year) and 33% say they are driving according to the speed of other motorists (up from 28% in 2020). If quieter roads are encouraging some drivers to break the speed limit, this in turn could lead to others doing precisely the same thing.

On both 60mph and 30mph roads a significant minority of drivers (21% and 27% respectively) say they exceed the limit because they do not look at their speedometer frequently enough.

By far the most common justification for speeding in 20mph areas is that the limit is inappropriate for the road – a view taken by 49% of those who at least occasionally exceed the limit. This is an increase on 2020's 45% and much higher than the rates of 33% and 31% recorded in 2019 and 2018 respectively. This could reflect the fact that more 20mph zones have been rolled out in the last two years, but also that such zones are often found near schools, which had been closed for some of the period leading up to this year's survey.

The Report also asked drivers to what extent they had exceeded limits on different types of roads: more than a third (34%) have driven faster than 80mph on a motorway (including 6% who have exceeded 90mph). On 20mph roads, 10% have driven in excess of 30mph while 44% say they have never exceeded 25mph.

“ The pandemic saw increased speeds, particularly on dangerous country roads and in urban areas where there are pedestrian and cyclists. It also led to some dangerous and bizarre driving behaviour – now the third biggest overall concern for drivers. Public transport was falsely demonised during the pandemic. It is essential that we rebuild confidence in public transport and reverse the trend in speed.”

David Davies, Executive Director, Parliamentary Advisory Council for Transport Safety (PACTS)



Expert view

5.3

Drink-driving

While drivers under the influence of drink remains a major concern for many motorists, its importance has steadily diminished over the past six years. While 29% of drivers said drink-driving was a top concern in the 2015 Report on Motoring, that proportion had fallen to 20% by 2020 and stands at 18% this year. Although the most recent declines in concern may to some extent reflect the closure of many pubs, bars and restaurants as a result of lockdown restrictions, it is also part of a longer-term trend.

Drivers aged under 25 are the most likely to express concern about drink-driving: it is the second most common concern among this age group, shared by 32% – possibly because younger drivers have greater levels of exposure to this kind of behaviour among their peers, or perhaps because drink-driving is simply now more culturally unacceptable among this age group.

The temporary closure of venues which serve alcoholic drinks is no doubt responsible for the fact that 94% of drivers do not believe they have driven while over the drink-drive limit in the past 12 months. This is the highest rate in the last six years: in 2020 the proportion was very similar (93%), but prior to the pandemic in both 2018 and 2019, compliance was significantly lower at just 81%.

32% 

of drivers aged 17-24 said drink-driving was a top concern

“ It is clear that in 20mph limit areas some drivers still struggle to reconcile the limit with the environment around them, as almost half believe such limits are ‘inappropriate’ – by far the highest for any road category.”

Tony Greenidge, Chief Executive, IAM Roadsmart

Expert view



5.4

Other traffic offences

The Report also asked drivers how often they see other road users commit a number of traffic offences that result in fines rather than penalty points: the most common is stopping in yellow box junctions (48%) followed by drivers leaving their cars idling while parked at the side of the road (45%). Next on the list is motorists who stop in bike boxes at traffic lights (27%) and drivers disobeying no-turn or no-U-turn signs (23%).

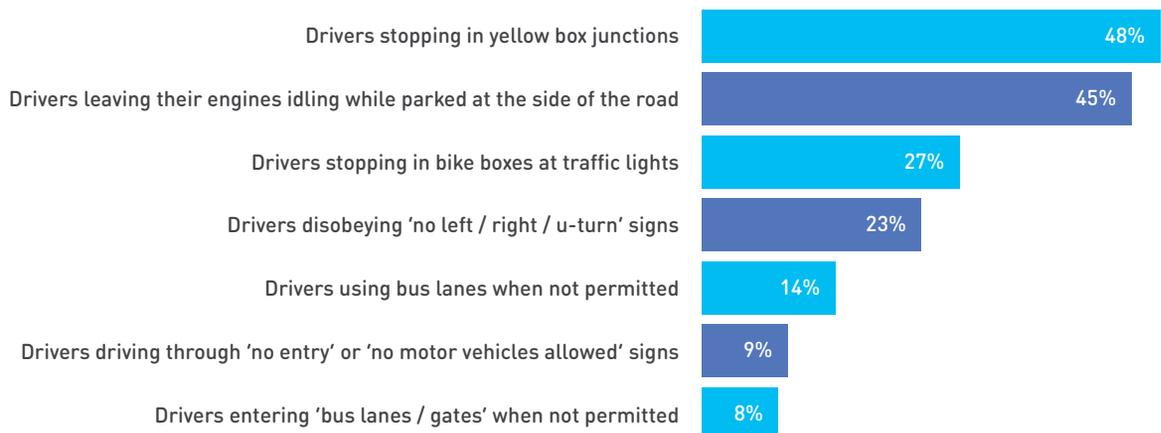
There is strong support for using revenues raised from fines from such offences to improve local roads – 84% of drivers back this idea.

Most motorists (71%) say there is a risk that confusing signage and road layout could lead to more penalty charge notices being issued for these offences, but only 29% of drivers think that compliance with traffic rules signs has got worse in their local area over the past five years.

And in light of the fact that the Government has confirmed it will be handing councils new powers to impose fines for certain traffic offences by the end of 2021¹, most drivers (67%) think local authorities should be required to issue warning notices in the first instance before handing out financial penalties.

Which traffic offences do drivers see committed most often in their local areas?

Yellow box junctions and engine idling are by far the most commonly observed offences



1. www.rac.co.uk/drive/news/motoring-news/councils-to-get-powers-to-fine-drivers-for-common-traffic-offences/

Our work for drivers

Fuel duty freeze

Given the increase in prices at the pumps primarily driven by a much higher oil price, we called on the Government not to increase fuel duty this year. In his March 2021 Budget, the Chancellor confirmed that a planned fuel duty rise would be cancelled for this year.

Supporting the transition to electric

The RAC has consistently called for more rapid public chargepoints with contactless payment for electric vehicle drivers. In November 2020, the Chancellor announced more than £1bn to support rapid and local charging hubs, while the Government also announced plans in early 2021 to make it simpler for consumers to charge their vehicles with an announcement on increased contactless chargepoints and standardised pricing.

Input into the parking code of practice

Having campaigned for a set of standards governing the actions of private parking companies to be introduced, the RAC has been involved in drafting the new Parking Code of Practice. The code will include a set of national standards for private parking companies to adhere to, alongside a single, independent appeals system.

Closing the mobile phone loophole

Following discussions with the RAC, the Government announced in late 2020 a loophole in the law governing the use of handheld mobile phones at the wheel would be closed. Currently, drivers are banned from using their phones for 'interactive communication' purposes such as making calls and sending texts whereas taking photos or videos, which do not involve communication, are technically not covered. The change will, however, outlaw all handheld interaction with mobile phones.

Advising drivers in a changing world

Our working relationship with the Government means we have been able to efficiently update our advice to drivers throughout the pandemic, as restrictions have changed, to ensure they can travel safely where necessary. We have also updated our guidance to drivers looking to take their vehicles to EU states following the new trade agreement terms between the United Kingdom and the European Union.

EMERGENCY USE ONLY



CHAdeMO



EV QUICK CHARGER

30
minutes
rapid charge

the new
filling station



Bath & North East
Somerset Council

Clean air



ZONE

**Charges apply
Pay online**



Assisting drivers in clean air zone areas

With some cities in England launching chargeable clean air zones, we have worked with local authorities and Defra to ensure plans are in place to assist lower-income drivers and smaller businesses with non-compliant vehicles. As a result, many councils will now be including some incentives to soften the financial impact on the worst-affected drivers. Following our calls to make it easy for drivers to find out if their vehicles will be liable to charges, the Government has also introduced an online vehicle emissions checker.

Continuing to improve smart motorway safety

Following the publication of the Government's 18-point all lane running smart motorways action plan in 2020 the RAC has continued to push for new safety features to be introduced. While much of the plan is on track and the installation of crucial stopped vehicle detection technology is now due to be completed ahead of schedule, we will continue to campaign for enhanced safety features across the motorway network. This year we continued our campaign by giving evidence to the Transport Committee's inquiry into the safety of these controversial motorways.

Assisting novice drivers

The RAC has worked with the DVSA to ensure a plan is in place to help clear the backlog of practical and theory driving tests that were unable to take place during recent national lockdowns. This has included a commitment from DVSA to conduct tests seven days a week, which will increase its capacity by 15-20,000 tests per month.

Non-endorsable traffic offences

The RAC is working with the Department for Transport to ensure clear guidance is published for local authorities that will be given powers to enforce moving traffic offences – such as stopping in box junctions – from December 2021. We have also successfully lobbied for warning letters, rather than instant fines, being sent to drivers for a first infringement.

The RAC is proud to represent drivers in its work with government and the public sector. We use our research and breakdown data to positively influence public policy and decision-making. We represent drivers at the DfT's Motorists' Forum and sub-groups on smart motorways and roadworks. We also sit on government departmental advisory panels for road transport emissions and connected and autonomous vehicles.

Our messages to government

Road conditions

Condition and maintenance of local roads

Despite lower traffic volumes over the last 12 months, the condition and maintenance of local roads is drivers' top concern for the second year running. The RAC urgently calls on the Government to set out a long-term funding strategy for local roads to improve and guarantee their condition into the future by ringfencing funds from existing fuel duty contributions. If 2p per litre was to be ringfenced, this would secure £4.7bn additional funding over a five-year period.

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 personal mobility – such as e-scooters and electric bikes. While this year's Report shows drivers are still reliant on their vehicles, there is also support for alternative transport for 'last mile' journeys in our towns and cities.

Reducing emissions on our roads

Electric vehicles – demand

With drivers increasingly looking to plug-in alternatives as their next car choice, we urge the Government to extend the plug-in car grant incentive beyond 2023 so as not to stunt EV growth ahead of its own 2030 target.

Electric vehicles – infrastructure

Accessing a fast and reliable public charging network remains a barrier to electric vehicle take-up, so we encourage the Government to establish a national target for public chargepoints and to consider local charging hubs to make it easier for those without off-street parking at home to charge their vehicles. We also strongly urge the Government to make contactless payment at chargepoints a focus in the coming years as well as ensuring they can be used easily by disabled drivers.

Reducing emissions from idling engines

We continue to urge local authorities to be more pro-active in encouraging drivers to switch off their engines when stationary, particularly outside schools.



Road safety

Smart motorways

The RAC remains concerned about the risk to broken-down vehicles on all lane running (ALR) smart motorways. The Government's action plan commits to the ALR configuration, however we believe the Government should consider alternative options which could include retaining rather than scrapping dynamic hard shoulder schemes which have demonstrated greater levels of safety, are preferred by drivers and are better suited to accommodating future traffic trends.

Country roads

The RAC calls on local roads authorities to conduct a widespread review into the suitability of 60mph speed limits on country roads within their areas and to seek to reduce the limits of those which have the worst road safety records.

Younger drivers

Younger drivers continue to be disproportionately represented in the road casualty statistics. We urge the Government to make 'black box' telematics-based insurance products a more attractive option to younger drivers by cutting Insurance Premium Tax (IPT) on these policies. Such policies are known to reduce road traffic collisions by monitoring the behaviour of younger drivers behind the wheel and informing them of how to improve their driving skills.

Taxation

Reforming taxation

This year's findings show drivers are open to the idea of a usage-based tax to replace fuel duty, something that will be required as the number of electric cars on our roads increases. Although there are concerns about how this might operate, we believe the Treasury should launch a future motoring taxation taskforce to discuss with stakeholders how a scheme should look.

Parking

New parking code of practice

Given legislation was passed in 2019 to set out national standards for private parking companies to follow, we believe the Government must now set a final deadline to have the full national code published this year with a functioning, independent single appeals system in operation by Spring 2022 at the latest.

QUEUE
CAUTION



40

40



Drivers and their vehicles at a glance

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



Miles driven in 12 months prior to the pandemic

Miles driven	%
5,000 miles or fewer	32
5,001-10,000 miles	35
10,001 miles or more	33



Miles driven in 12 months during the pandemic

Miles driven	%
5,000 miles or fewer	60
5,001-10,000 miles	17
10,001 miles or more	23



Age of vehicles*

Motorists who own a car	%
Less than a year old	5
1-2 years old	9
2-3 years old	9
3-4 years old	15
Between 5 and 10 years old	35
More than 10 years old	27



Number of cars per household

Households with	%
One car	51
Two cars	35
Three cars	10
Four cars	3
Five or more cars	1

Average number of cars

In household	1.68
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*Age of vehicle driven most often



Research methodology

The RAC Report on Motoring 2021 is based on a large-scale online survey carried out by Online95 on behalf of the RAC. In total, Online95 interviewed 2,652 UK motorists (i.e. those who hold a full, current UK driving licence, drive at least once a month and have a motor vehicle in their household). The survey was conducted from 3-23 May 2021, with the questionnaire taking around 30 minutes to complete. Responses were rim weighted to be nationally representative of UK motorists in age, gender, socio-economic groups and all UK regions. The data in the Report was analysed and reported by Ragdoll Research & Planning.

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 on the next page 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, 1,848.



Sample size	Reported percentage at 95% level of confidence				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000	±1.86%	±2.48%	±2.84%	±3.04%	±3.10%
1,848	±1.37%	±1.82%	±2.09%	±2.23%	±2.28%

How to read the above table: Assume the reported percentage, with an effective sample base of 1,848, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.82%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with an effective sample size of 1,848 will produce a percentage of 23%, plus or minus 1.82%, or within the range of 21.18% and 24.82%.

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

As the UK's biggest breakdown company, the RAC provides complete peace of mind to more than 12.7m UK personal and business members. Whatever the driving need, we have a range of mobility and driving services and solutions – from breakdown assistance to insurance, and everything in between.

Headquartered in the West Midlands with around 4,000 staff, the RAC operates from three bases – Walsall, Manchester and Bristol – with its vehicle and breakdown services underpinned by its nationwide, branded patrol force, focusing primarily on vehicle repair and recovery. In 2020, the RAC attended to 2.2m breakdowns.

Last year we 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. And, 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.

We provide individual members and small business owners with breakdown cover and a broad range of exclusive optional extras on either an annual or flexible

monthly subscription basis, and a related range of garage services and third-party products. Through our partnerships with leading motor manufacturers, banks, insurance companies and fleets, we also provide breakdown and accident assistance to individuals and technical and customer support services. In insurance, we offer primarily motor and telematics insurance policies, many of which are available through price comparison websites.

The RAC also offers drivers an online shop, a new and used car buying website, legal services, vehicle history checks and inspections, and a nationwide network of approved repair garages and used car sales dealerships. In addition, we are working to accelerate the switch to electric cars with the launch of EV leasing, home charger installation and a bespoke electricity tariff for EVs. We are also constantly investing and innovating to ensure we are best equipped to look after the cars of today and tomorrow. We have upgraded our fleet of breakdown vans to cater for the needs of EVs: we can now give emergency charges to depleted EVs and, if needs be, tow them with all four wheels off the road without the need for a separate flatbed recovery vehicle.

Using our research with drivers, the RAC campaigns at a national level on the biggest motoring issues, including the importance of the car, 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.

Contact

For all enquiries related to the RAC Report on Motoring, or for specific data requests, please contact the RAC press team on:

Email: press.enquiries@rac.co.uk



Advisory panel

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

Matthew Avery

Director of Insurance Research,
Thatcham Research

David Bizley

Former RAC Chief Engineer and Technical Director

Ginny Buckley

Motoring Journalist & Founder of electrifying.com

David Davies

Executive Director, Parliamentary Advisory
Council for Transport Safety (PACTS)

Claire Evans

Consumer Editor, What Car?

Steve Gooding

Director, RAC Foundation

Tony Greenidge

Chief Executive, IAM RoadSmart

Claire Haigh

Chief Executive, Greener Transport Solutions

Mike Hawes

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

David Leibling

Transport and Motoring Consultant and
Founder of the Report on Motoring

Graeme Paton

Transport Correspondent, The Times

Theo de Pencier

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

Melanie Shufflebotham

Co-founder, Zap-Map





Report author: Chris Torney
Design: RAC
Research: OnLine95
Analysis: Ragdoll Research & Planning

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