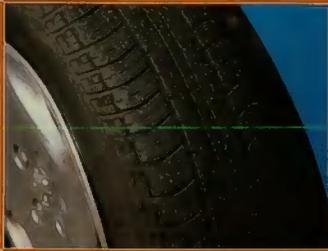


RAC

DAL master



RAC Report on Motoring 2001

Motoring choices –
pressure or preference?

RAC

RAC's vision is to be the first choice provider of individual motoring solutions to the consumer and business market places.

RAC offers exceptional levels of support to its six million customers throughout the whole of their motoring careers.

For many of our customers our wide range of "cradle to grave" services begins with driving tuition from RAC Group company BSM – the UK's largest driving school with an unrivalled high street presence. RAC's expert vehicle examiners offer an impartial opinion when you decide to buy a used car – and, should your vehicle break down, our 1,250 uniformed patrols will deliver speedy assistance at the roadside.

Other RAC services include advice from RAC staff on all aspects of travel – from warning of congestion ahead to providing holiday travel insurance or recommending the best hotel in town – and round the clock legal expertise from RAC's team of legal eagles.

RAC's Government Affairs team spearheads campaigns on behalf of both RAC Motoring Services and our members. It runs our highly successful Grass Routes competition which challenges UK schools to devise green travel plans for staff and students. Its activities complement those of the RAC Foundation for Motoring, a charitable organisation which champions the interests of motorists.

RAC Consumer Division

When most people think of RAC, the first thing that comes to mind is our ubiquitous patrol force. Recruited on the basis of their experience, qualifications, aptitude and dedication to customer service, our patrols benefit from further in-house training and careful monitoring of their performance.

Their average response time to a breakdown call is just 40 minutes and their skills enable them to fix more than eight out of ten breakdowns at the roadside. Using state of the art technical equipment including a hand-held CD ROM unit which holds the equivalent of many thousands of printed pages of technical information and an electronic diagnostics tester which accesses a vehicle's on-board systems to diagnose the precise nature of a fault, they achieve an average roadside fix time of just 22 minutes. RAC customers also have access to a nationwide network of Autocentres which provide servicing, repairs and MOTs for all makes of car.

RAC remains at the forefront in developing in-car telematics. RTT – a joint venture between RAC and Trafficmaster – offers dynamic traffic and travel information using the most up to date communication and satellite location technology. Via its award winning website www.rac.co.uk, RAC provides on-line services including live traffic information, estimated journey times, hotel and vehicle examinations booking services and advice on many aspects of motoring.

RAC members enjoy a comprehensive range of other benefits and discounts on motoring and travel products.

RAC Business Services

Partnership is at the heart of RAC's relationship with its corporate customers to whom we supply a wide range of bespoke solutions. Customers include some of the UK's leading passenger car, truck and motorcycle manufacturers, contract hire and leasing companies, vehicle fleets and insurance companies.

RAC offers its business customers far more than simply a breakdown and recovery service, with a product portfolio including accident management services, warranties, training services, risk management and state of the art journey management.

BSM

BSM are the UK's leading and best known driver training experts, with more than a hundred high street centres in towns and cities across the country. Their commitment to developing and utilising the latest driver training technology is demonstrated by their unique computerised driving simulators, award winning hazard perception computer programmes and computerised banks of driving theory test questions.

The company – part of RAC Group – also provides tailored driver training in specially adapted cars for people with disabilities, while market leader BSM Fleet Training offer tuition to reduce the number of fleet driver accidents.

A range of specially tailored classroom and off-road courses – Keep on Moving, Ignition and Signal – gives BSM a well established presence in more than 1,500 UK schools and colleges.

Lex Service PLC

RAC Motoring Services is part of Lex Service PLC, a group which provides motoring and related business solutions to individual and corporate customers in the UK and Europe. Lex Business Services include vehicle management, mechanical handling and inventory management, helping industrial and commercial customers operate more effectively by enabling them to outsource these activities and focus on their core business. Lex provides contract hire, rental and fleet management for cars, trucks, Komatsu, Daewoo, TCM and Crown lift trucks and retails a range of trucks through its network of commercial dealerships. For more information about Lex, visit www.lex.co.uk.

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January 2001

RAC Report on Motoring 2001

Motoring choices – pressure or preference?



- Section one Everyday motoring choices
- Section two Safe and responsible motoring
- Section three Motoring for leisure
- Section four Motoring in the future
- Section five Motoring and disabled people
- Section six The internet
- Section seven Buying our cars
- Section eight Looking after our cars
- Section nine Driver and car profiles

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Foreword

by Lord Macdonald, Minister for Transport



It is clear that, as this report shows, many people depend on their car, and will continue to do so, especially in rural areas. As we said in the 10 Year Transport Plan published last July, cars are often the most attractive, and sometimes the only transport choice. The challenge is to ensure that the increased mobility and access to goods and services that we all want does not undermine our quality of life.

This is why the Plan provided £180 billion over the coming decade to reduce congestion, improve integration and provide a wider choice of quicker, safer, more reliable travel on road, rail and other public transport.

Spending on local and national roads will total £59 billion. That will allow us to tackle many of the concerns that this report shows continue to be of real concern to people. We will be able to reduce road congestion to below current levels. This sum is enough to provide 100 new by-passes to take traffic away from towns and villages and smooth traffic flows and widen 360 miles of motorways and trunk roads to ease bottlenecks, reduce accidents and eliminate the backlog in local road maintenance. We will install quieter surfaces on over 60% of the strategic road network, including on all concrete roads.

The plan will also allow us to provide better public transport services that will offer a realistic alternative to the car. The plan provides £60 billion to expand and upgrade the railway network to increase freight and passenger carriage and to improve comfort, safety and punctuality and make stations more attractive.

There will be a substantial increase in local transport spending. At the end of last year we announced an £8.4 billion boost to local transport. This covers five years' worth of investment, £4.4 billion for major public transport projects and £4 billion for local roads. It will fund more modern bus, tram and light rail systems supported by park and ride schemes and encourage more flexible and innovative services in rural areas. It will also fund over 8,000 schemes focusing on road safety measures, including 20 mph zones outside schools, traffic calming measures and safer travel to schools. Surrey County Council for example has plans for high quality school bus services across the county operating from new interchanges in residential areas and outside schools.

If we are to achieve the benefits promised in the 10 Year Plan, people will need to shift some of their journeys away from the car. That does not mean trying to force people off the road, or stopping them using their car altogether. But it does mean encouraging them to walk, cycle or use public transport for some or parts of journeys where it offers a reasonable alternative.

I am pleased therefore that this report shows that nearly two-thirds of motorists named one journey a week they could or would be prepared switch from car to public transport, particularly for shopping. One journey may not sound very much. But this would have a major impact on traffic if everyone acted.

The RAC's Grass Routes challenge described in this report offers a practical means of helping to effect this travel shift. It must be right to target effort to help young people and their parents to make such a shift through school travel plans. It is also encouraging that 1,000 secondary schools have registered to take part. This offers a significant boost to our campaign to develop school travel plans.

The report shows that our message is getting through to others. Businesses are taking an increasing interest in travel plans. Motorists are generally responding to our programmes to promote fuel efficiency. Recent Budget changes in car tax rates to favour smaller cars are beginning to take effect. We are buying more fuel efficient cars; now we must focus on how to drive them more efficiently.

I am heartened that this RAC report gives evidence of the public interest in new car technology. Working in conjunction with the Highways Agency's Traffic Control Centre satellite navigation systems can help motorists avoid congestion and thereby reduce pollution. As the 10 Year Plan showed, we are looking to manufacturers to develop systems to ease journey planning for motorists, improve traffic management and encourage better driving styles.

New technologies can also improve road safety, which the report shows remains a high priority for motorists. We already have the safest roads in Europe. But we have to make them safer yet, as the Road Safety strategy we published at the beginning of 2000 is designed to do. New technologies will also bring fuel efficiency benefits that will help to address the climate change issues that have quite literally been brought to our doorsteps with the recent floods.

I was interested to see that this year's RAC Report has for the first time focused on the views of disabled drivers. As part of our Modernising Government agenda we are keen to ensure that our policies take proper account of the concerns of all sectors of the community. Our recent Rural and Urban White Papers show what we are doing to improve access for all and to tackle social exclusion by increasing access to goods and services for those who do not have regular use of a car.

I am therefore delighted that representatives of a wide range of interests, including specifically women and disabled drivers, have joined the Motorists' Forum that Sir Trevor Chinn, the chairman of Lex, set up a year ago. The Forum has quickly established itself as the natural vehicle for discussion with Government on issues affecting the car. Its members offer constructive advice and are helping to identify priorities for action. Reports such as this help inform their advice on what is of concern to motorists and how effectively our new agenda on integrated transport is being delivered.



Lord Macdonald
Minister for Transport

Introduction

by the Group Managing Director, RAC Motoring Services

This 2001 RAC Report on Motoring is the second produced by RAC Motoring Services and the 13th edition of the annual motoring survey initiated by Lex Service PLC in 1989. Much of the value of the RAC report comes from our trend analysis and we have revisited and updated many of the issues covered in previous reports. This year we have added a new dimension focusing on the views of drivers with disabilities and we have included their needs in our Call for Action.

This year's report emphasises the choices which motorists face in making their transport decisions, whether under pressure from lack of realistic alternatives, work or family commitments, or because of their personal preferences. Although fewer cars and less congestion top motorists' wish lists for relieving pressure over the next decade, growing numbers of respondents believe that they would find it difficult to adjust to life without the car. More worryingly still, this year fewer motorists say that they would even consider using public transport, regardless of improvements in frequency, cost and reliability.

The fuel protests in September 2000 and the disruption following the tragic Hatfield rail crash will have influenced how motorists make their choices between using their car and using public transport. As a result, it may take longer for people to change their travel habits. Policy makers will need to adopt a more innovative approach to engage motorists, targeting particular journeys where people can readily switch modes.

Changing travel habits means encouraging young people, who are not yet set in their travel patterns, to think about alternatives to the car whenever they can. That is the rationale behind RAC's Grass Routes challenge, which encourages students themselves to develop a travel plan to reduce car journeys to school. RAC has been delighted with the response to the Grass Routes challenge, with over 1,000 secondary schools registering to take part. Schools and students are keen to tackle this issue to help reduce congestion and improve health and safety. RAC has received very helpful advice on school travel plans from DETR.

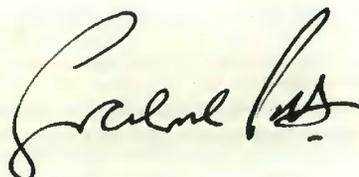
Fuel efficiency is among motorists' priorities when looking to update their cars. While this may have been influenced by the recent fuel crisis and the rising cost of petrol, it is encouraging that motorists are thinking of ways to reduce their motoring costs and help achieve carbon dioxide emission targets. The government's new financial incentives to encourage motorists to choose greener, more fuel efficient cars through graduated vehicle excise duty will stimulate this trend.

Echoing the views of last year's report, motorists are still concerned about improving the standards of driving of the old and young, though they themselves continue to adopt habits which they know are dangerous, such as using mobile phones without hands free kits. This highlights the continuing need for road safety education for all members of our driving community. RAC continues to play a leading part in promoting responsible motoring both to our customers and to the wider public.

In the 18 months since joining Lex Service, RAC Motoring Services has set a new vision of providing individual motoring solutions to both consumers and corporate customers. We are striving to deliver this by developing our portfolio of products and services and by refining our customer contact strategy to deliver higher levels of customer satisfaction. Our website at www.rac.co.uk has been re-designed and demonstrates publicly our new direction.

My thanks go to David Leibling who has written the report, to Sample Surveys who conducted the research, to RAC Design who have designed and produced the report, to Anne-Marie Hill of Lex Service and to my own team of Nina Arnott, Amanda Bowman, Peter Brill, Rob Maynard, Mark Milward and Ann Skey.

I hope that you find the report both interesting and useful.



Graeme J Potts
Group Managing Director
RAC Motoring Services

Call for Action

1. Target road safety among fleet drivers

Safety should not be a matter of choice but a necessity, using legislative pressure if required. In spite of overwhelming evidence that driving a company vehicle rates amongst the most hazardous work activities, "management" seems to regard work related road accidents as an inevitable cost of doing business. RAC is calling on government and employers to make risk management audits and linked driver training part of the health and safety process. This is expected to be part of the forthcoming HSC code on directors' responsibilities for health and safety and foreshadowed in the DETR/HSC 'Revitalising Health and Safety' strategy statement.

2. Make driving while tired an unacceptable practice

Everyone has a responsibility not to drive if they feel tired. Driver tiredness is believed to cause at least 10% of all road accidents – and 20% of accidents on motorways and trunk roads. RAC is calling for a government led campaign to highlight the risks and to promote simple steps drivers can take to avoid them, helping the UK achieve the 2010 road safety targets. Companies, too, can lead the way by creating a safe driving culture where business targets do not exert pressures which encourage unsafe driving practices.

3. Improve the driving standards of novices and experienced drivers

RAC and BSM call for a compulsory graduated licensing system to raise the standard of novice drivers and reduce the number of road accidents in the longer term. The system might include limiting the number of passengers that he or she can carry during the first six to twelve months.

RAC strongly supports more driver improvement schemes for drivers convicted of a wide range of motoring offences. These are likely to have a much higher success rate in modifying driving behaviour than simple payment of a fine, however high.

4. Incentivise a reduction in school car journeys

The school run not only adds to congestion in the morning peak but it may also set benchmarks on which young people will base their future travel decisions. Providing realistic alternatives to the car is therefore highly desirable. RAC is committed to tackling the school run through its Grass Routes initiative, which encourages young people at secondary schools to develop their own school travel plans. The government has already done a great deal to help schools tackle the school run. Based on the findings in this survey, RAC calls on government and local authorities to consider financial incentives for school buses. From a range of options presented in this research, school buses proved to be the most popular solution to giving up the car for the school journey.

5. Raise the awareness of safety measures on the motorway

Retaining the hard shoulder in the interests of road safety received overwhelming support from motorists in this report. RAC calls on the government not to jeopardise the tremendous progress made on road safety by using the hard shoulder as a running lane merely to maximise existing road space in order to tackle congestion. Linked to that, RAC would like to work in partnership with government to raise drivers' awareness of how to protect their own and other road users' safety if they break down on the hard shoulder.

6. Maintain ready access for disabled drivers

To maintain easy access to city centres for people with disabilities, RAC would like to see the availability of designated parking spaces protected by significantly higher fines for those who illegally occupy them. RAC welcomes the DETR review of the orange/blue badge scheme, an area of concern shared by both disabled and able-bodied drivers.

Motoring choices – pressure or preference?

Summary

1. Reliance on the car

This year, the highest ever proportion of motorists (86%) say that they would find it very difficult to adjust their lifestyle to being without a car, although 9% disagree. While that may have been influenced by the timing of the research – during the September 2000 fuel protests – it maintains a pattern which has been evolving since 1988. With increasing pressure on drivers' daily lives, especially if they are working, the car is essential for many routine activities and drivers choose to use it because of the sense of freedom it provides. An increasing proportion of drivers are treating their car as an integral part of life, with over half of all drivers not caring what car they have as long as it gets them from A to B. More people are becoming drivers – since 1975/6 the proportion of women with driving licences has doubled from 29% to 59%. If this and other demographic trends continue, there could be another 8 million drivers by 2010.

2. Unwillingness to give up the car for public transport

Because of pressures they suffer, motorists are less willing to reduce their car use. The proportion of drivers agreeing that they would use their car less if public transport were better is only 36%, the lowest figure since 1992. Public transport would have to be more frequent, cheaper and more reliable to make people consider switching. However, a number of drivers said they could not suggest any changes to public transport because they never use it.

Congestion is playing a part in driver choice, with drivers reporting that they have abandoned 0.4% of car journeys because of congestion. Although this is a small percentage, it amounts to a saving of 80 million car journeys a year and experience shows that even a small decrease in traffic leads to a considerable reduction in congestion. 60% of motorists named one journey a week they would be prepared to switch from car to public transport, particularly for shopping.

Drivers use cars to take their children to school for both practical and safety reasons, again reflecting the pressures of modern life, although many of these cars would still be on the road at these times for other journeys such as shopping or commuting. The most effective means of changing their mode of transport would be free or paid-for school buses. "Green" travel plans are coming increasingly onto the agenda, with 6% of drivers working in companies where they are in operation.

3. Pressure while driving

With the pressures of modern life and constant lack of time, drivers may be tempted to use their time in the car to do other things besides concentrating on their driving. Most worrying is the number of motorists who drive when they are too tired – the equivalent of 4 million motorists having admitted to falling asleep at the wheel in the past year. Drivers under pressure from employers to get to a destination on time are more likely to have driven when tired. There is increasing acceptance of use of the hands free telephone in the car – although it can still be distracting. Fortunately most drivers view activities such as shaving or putting on make up while driving as extremely or very dangerous.

4. Need for better training and safety measures

Most young people choose to learn to drive as soon as they become 17. It is vital that steps are taken to improve the safety of newly qualified drivers, as official figures show that they have a much higher likelihood of accidents. Motorists are encouragingly supportive of motorway training, a probationary plate and a minimum number of driving lessons with an approved instructor. They also support re-testing the over 70s. Drivers are uncertain of the correct approach to safety on motorways and are very concerned about the use of the hard shoulder to reduce congestion.

5. Making the journey easier

While many journeys are on familiar routes, motorists also choose to take their cars on 40 million holiday journeys a year. Most drivers use traditional "technology" – a road atlas – to plan their route on a longer journey but a substantial number rely on road signs. They also rely on the radio for up to date traffic information while on the road. New electronic means, such as route guidance systems and better road signs, could help to reduce the stress of driving and make it safer.

6. Ideas for change

Drivers were offered the opportunity to say what they would like to change about their cars, the road system and travel information.

With regard to their cars, the main choice was to get a newer, larger, or different car. Lower running costs were also considered important. Visionary ideas included cars that anticipated problems ahead and self-cleaning cars. If drivers could change one thing about the road system, it would be to have fewer cars and less congestion, but close behind were

improved road maintenance and better signage. While drivers did not want more new roads, they did want better roads, with more one-way systems, wider motorways, by-passes and dual carriageways. Suggested improvements to traffic and travel information focused on more up to date information and the possibility of an all travel radio station.

7. Looking forward to 2010

It is encouraging to see that drivers believe that they will be taking advantage of technology to reduce their driving or to make it easier. There is a strong expectation that more than half of people who currently work in offices will work at home via computers or terminals and that over half will do their shopping by computer with home delivery. Drivers also believe that all new cars will have automatic route guidance systems. They expect to pay £10 to drive into city centres or to park at the office while trucks will be banned from city centres during the morning and evening rush hours.

They are less certain whether only cars with two or more people will be allowed into city centres during the rush hours, or whether people will use public transport more so that there will be less congestion and pollution. However they are reasonably sure that there will not be a ban on drivers over 75, that all new cars will not be running on electricity and that there will not be a limit of one car per household.

Another indication of reliance on the car is the unabated growth in car ownership, with an expectation that there will be another 1.3 million cars on the road in two years' time. However, drivers appear to have chosen to keep cars longer, which may be a reflection of current uncertainty about new car prices and concern over higher insurance and fuel costs.

8. Motoring and disabled people

One group of motorists under specific pressure are the two million disabled drivers, a third of whom use wheelchairs. Two thirds of disabled drivers say they cannot use public transport because it does not meet their needs.

Disabled drivers are more likely to say that they could not adjust their lifestyle to being without a car. Their lives are so dependent on the car that they feel strongly that they would lose their sense of freedom and their ability to shop or to visit relatives. They specifically mention the loss of their independence and the inability to get to vital appointments, such as the hospital.

Disabled drivers feel strongly that there is misuse of orange badges and that there should be severe penalties for parking in disabled parking spaces – suggesting that offending drivers should be fined up to £1,000 or have points on their licences. Disabled drivers are only fairly satisfied with the way they are treated; among the improvements they would like to see are more parking spaces for disabled people, better policing of the disabled badge scheme and easier access to town centres.

9. The internet

High users of the internet (called "internet regulars") were sampled through a questionnaire on the RAC website. Without doubt, choice of sites for information and purchase is increasing. Internet users are most likely to log on to motoring websites for information about travelling, car buying and owning. While internet regulars are very likely to follow up enquiry with action, e.g. purchasing insurance or arranging car finance, other motorists tend to be much more hesitant.

Home shopping via the internet is likely to increase considerably but there is concern over the convenience of delivery. One consequence of increased home delivery would be extra delivery vehicles in residential streets at unsocial hours. Overall there is net support for more home deliveries but there is a considerable proportion of motorists who are undecided on the issue.

10. Making sure our cars are reliable, safe and environmentally friendly

One of the important areas of choice when buying a new or replacement car is ensuring that the car is safe and reliable. With more than 70% of cars being bought used rather than new, drivers seek reassurance about the car's mileage and condition when purchasing.

The changes to vehicle excise duty (VED or road tax) announced in November 1999 are beginning to have an effect on drivers' purchasing behaviour with 6% choosing a smaller or more fuel efficient car and 15% considering a change. Drivers are very supportive of regular emission checks and most would be prepared to pay up to £10 for such a service.

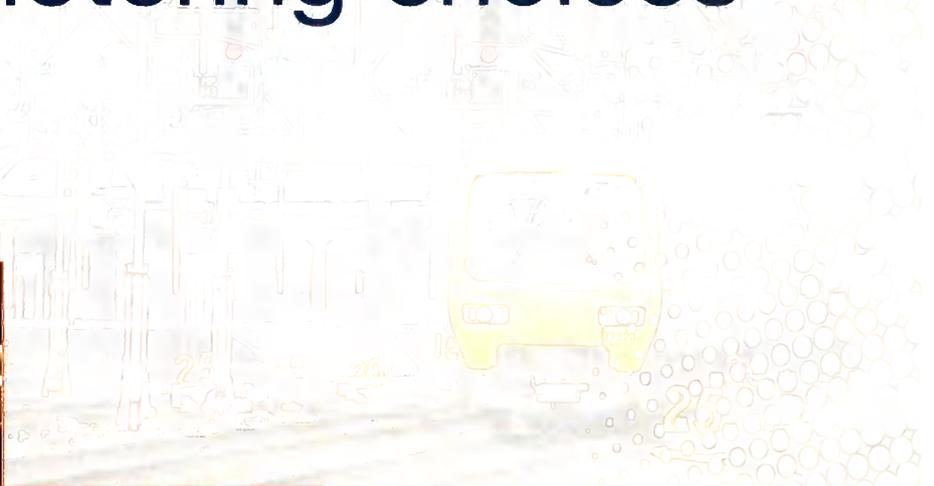
While nearly all men and most women can undertake simple safety checks on their car, such as checking tyre pressures and lights, a high proportion do not make these checks at least once a week.

Section



one

Everyday motoring choices

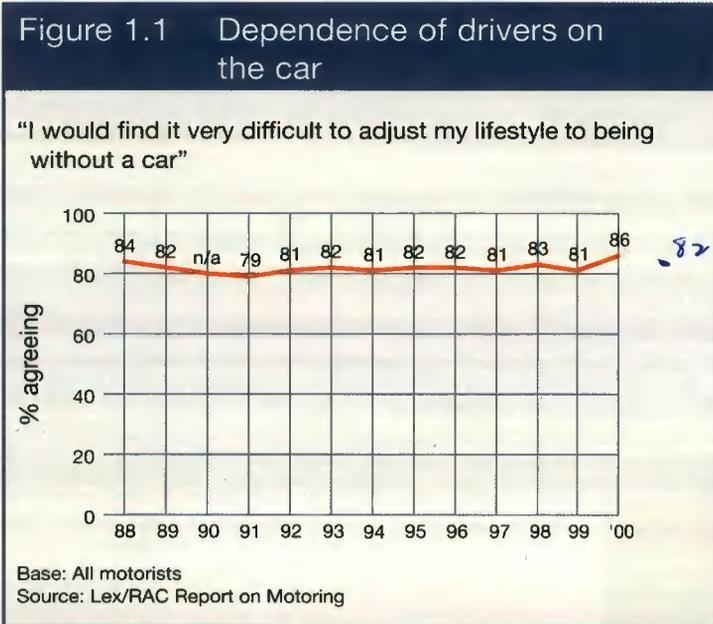


- How dependent are we on our car? How often do we use it?
- How would we manage without it? What would we miss?
- How do we interact physically and emotionally with our car?
- How do we view public transport? How could it be improved?
- What is the effect of congestion and how often does it make us consider alternatives?
- What journeys could we give up?
- How many miles do we drive a year?
- The school run – why do we do it and what would make us give it up?
- Are our employers playing their part with “green” travel plans?

1.1

How dependent are we on our car? How often do we use it?

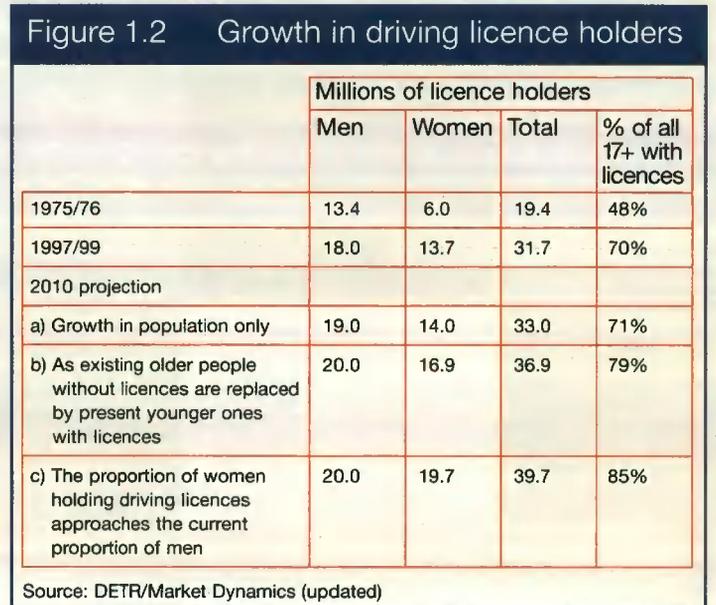
Britain's drivers appear to be more dependent on their cars than ever this year, with the highest proportion to date – 86% – saying that they would find it very difficult to adjust their lifestyle to being without a car. The timing of the research, during the September 2000 fuel protest, may have accentuated this response.



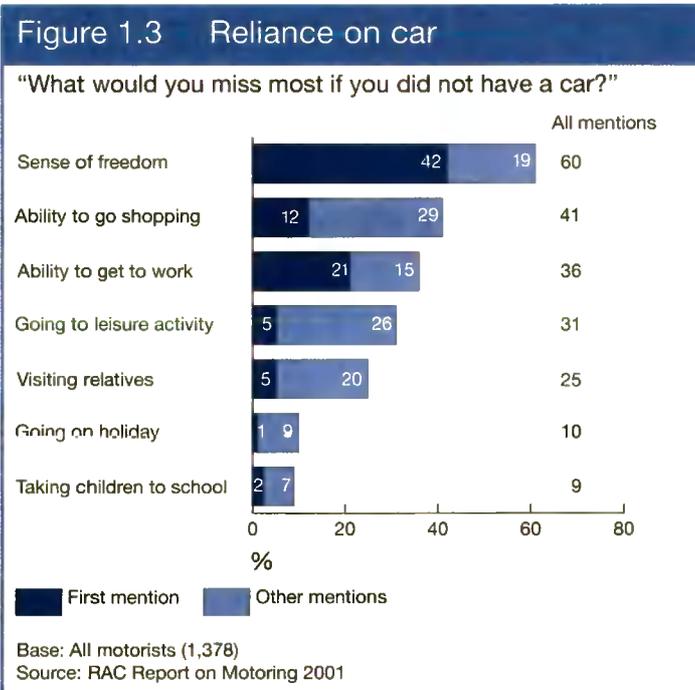
87% of motorists (51% of all adults aged over 17) choose to drive every day or most days. Travel by car, van and taxi now accounts for 85% of all passenger miles compared with 27% in 1952, the earliest date for which consistent records are available; for adults with driving licences 87% of passenger miles are by car and for children up to the age of 17 it is 84%. Even for adults without driving licences, 57% of their miles travelled are as a car or van passenger, with the remainder largely by bus. (Source: DETR)



31.7 million adults have a driving licence, compared with 19.4 million in 1975/6, an increase of 12 million drivers (60%). This closely mirrors the growth in car ownership over the period (67%). The biggest growth in driving licence holders since 1975/6 has been women, where the proportion with driving licences has doubled from 29% to 59% compared with an increase from 69% to 82% for men. Projecting forward on three different scenarios, based on updated research from the 1998 Lex Report on Motoring, the number of people with driving licences could rise by up to a quarter, the equivalent of 8 million more potential drivers on the road by 2010.



How would we manage without it? What would we miss?



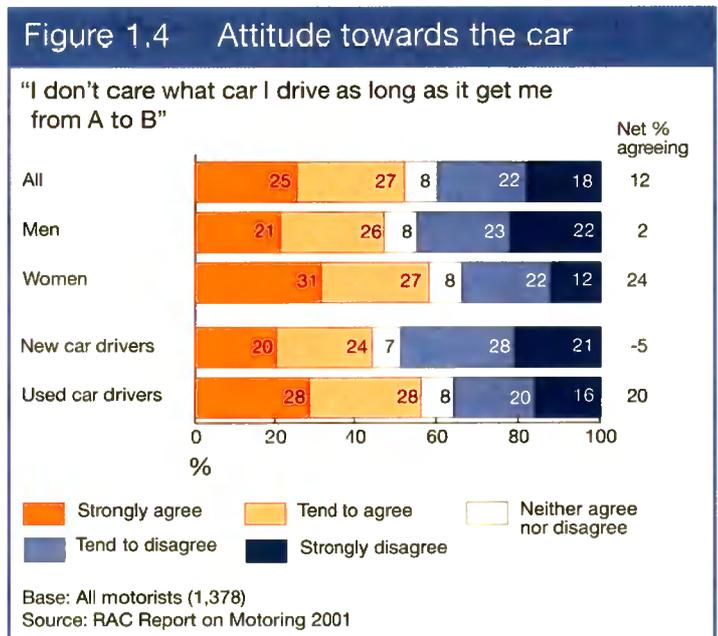
Drivers would miss the sense of freedom most if they were without their car, followed by their ability to go shopping and to get to work. Considering only those in full time work, the ability to get to work becomes the prime concern (61%), while as people get older the sense of freedom becomes even more important as do concerns about shopping. For those with children of school age, 23% are concerned about the ability to take the children to school.

One in six regular drivers (16%) is 65 or over. They were asked what would make them give up driving altogether: most said ill health or failing eyesight (84% combined) but 9% responded "If I lost my confidence", (13% for women). Only 2% of drivers over 65 expected to give up their car in the next two years.



How do we interact physically and emotionally with our car?

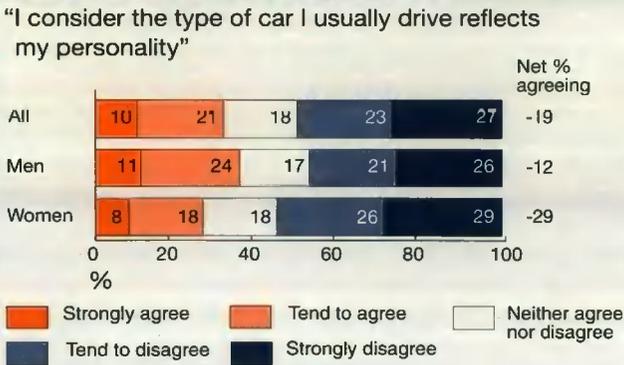
Whereas in the early days of motoring, there was a pride in actually owning a car, it has now become such an integral part of their lives that half of drivers do not care what car they have as long as it gets them from A to B. This view has become more marked since 1988. The net agreement (those "agreeing" less those who "disagree") has risen to +12%, compared with -9% in 1988, when the research started. New car owners, for whom there is still excitement and pleasure in owning a new car, do tend to disagree.



Men tend to be more emotionally attached to their cars, with only a net 2% agreeing (those "agreeing" less those "disagreeing") that they see their car merely as a means for getting from A to B compared with 24% for women.



Figure 1.5 Attitude towards the car



Looking at it another way, only a third (31%) of drivers agree that their car reflects their personality. 35% of men agree compared with 26% of women.

One in six drivers (15%) uses their car as a mobile office or crèche, rising to nearly half of drivers of company cars where the car is definitely seen as an extension of the workplace.

Figure 1.6 The car as an office or crèche

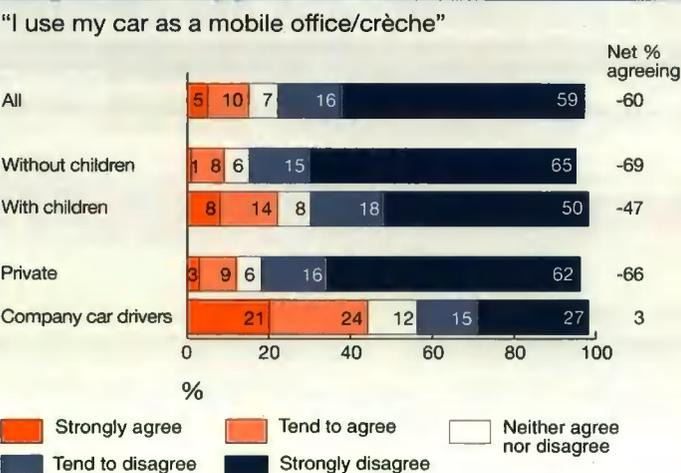
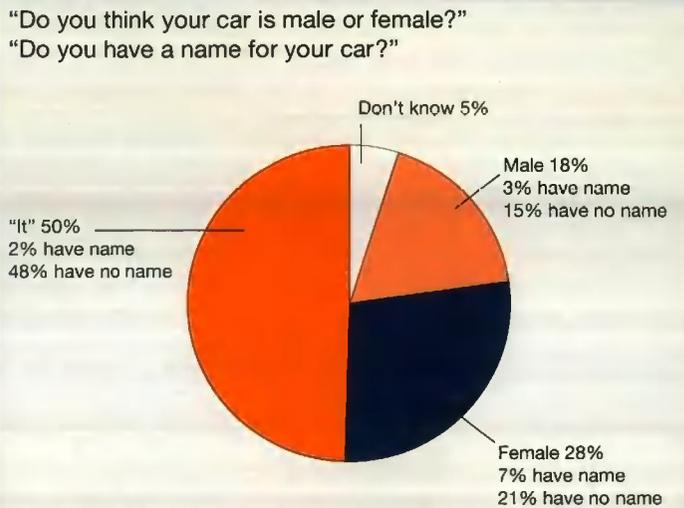


Figure 1.7 The personality of our cars



Another aspect of motorists' relationship with their cars is the fact that nearly half (46%) think their car is either male (18%) or female (28%) with the rest considering it to be neutral. Of those who consider their car to be male, 16% have given it a name while 26% of female cars have a name. Naming their car is more likely among those who believe strongly that their car reflects their personality, as 20% of them have given their car a name compared with only 11% overall.

RAC comment

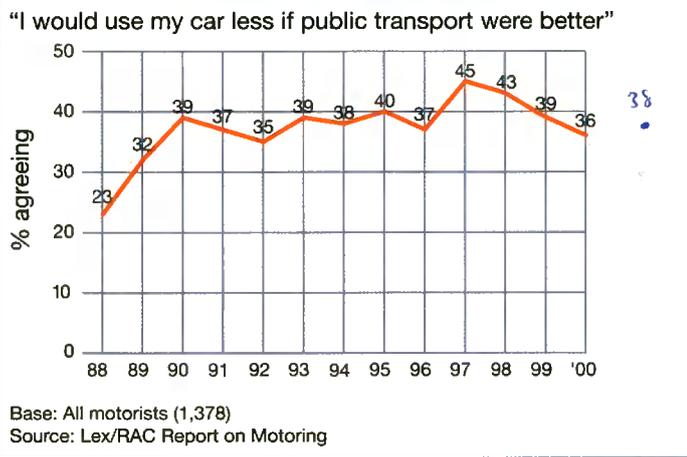
With most motorists choosing to drive every day, cars have become an integral part of our lives. It is not surprising therefore that the highest proportion of motorists ever say that adjusting to living without a car would be very difficult. An increasingly ageing population will further influence this. The car is seen as an essential part of modern life, no longer a luxury, critically providing a sense of freedom and flexibility. As we increasingly regard the car as a commodity to get us reliably from A to B, our preference as to what car we own or drive diminishes.



1.4

How do we view public transport? How could it be improved?

Figure 1.8 Willingness to use public transport



Despite exhortations to use public transport in recent years, there seems to be a further decline in the willingness to choose public transport, with only 36% of regular drivers now prepared to use their car less if public transport were better. This is the lowest figure recorded since 1992 and is the third consecutive year of decline. Those who live in rural areas are slightly more willing (41%) to use their car less if public transport were better, possibly because they currently have poorer public transport and do not have any real choice. Only 25% of company car drivers would consider using public transport more, reflecting the fact that they tend to use their cars to make a larger number of journeys in a day.

Figure 1.9 What would make public transport better?

	%	All	City	Urban	Rural
If it were more frequent	49	46	47	56	
If it were cheaper	43	45	46	35	
If it were more reliable	38	49	41	25	
If it were closer to home	13	12	12	14	
If there were better bus and train interchange	8	7	9	5	
If there were better routes/if it runs to places people want to go	8	5	8	10	
If it were cleaner	7	7	8	5	
If it were safer	3	4	4	4	

Base: All motorists (1,378)
Source: RAC Report on Motoring 2001

To increase its appeal, public transport needs to be more frequent, cheaper and more reliable. City dwellers place more emphasis on reliability reflecting problems caused by traffic conditions, while those living in the country where services tend to be few and far between are more concerned about frequency.

Part of the problem is the lack of awareness of public transport. A number of drivers said that they do not use public transport so could not think of anything they would want to change: "I've not used a bus for years", "I cannot remember the last time I used public transport", "Don't know anything about it", "No opinion, doesn't affect me".

Other drivers' responses to possible changes in public transport said: "Take it off the road, it's a waste of time", "Abolish it", "Public transport is unnecessary, most people in the village have cars", "Scrap it, improve the road system". These comments were offset by others such as: "More services in villages like this one", "To have some at all", and "More of it, especially in country areas". There was one particularly plaintive cry: "Could I have a bus stop outside my door?".



To increase its appeal, public transport needs to be more frequent, cheaper, and more reliable

1.5

What is the effect of congestion and how often does it make us consider alternatives?

Congestion is now affecting many drivers and is already having an impact on the choice of making a car journey. One in five drivers (21%) had decided not to make a car journey because of congestion in the preceding three months of whom 40% gave up three or more car journeys. This represents 0.4% of all car journeys, based on the average number of journeys by car of around 700 per driver per year (National Travel Survey). While this is a small percentage, it nevertheless amounts to a saving of 80 million journeys a year and experience shows that even a small decrease in traffic leads to a considerable reduction in congestion. There is no significant difference between drivers in city or rural areas.

Of the drivers who gave up a journey by car, half made the journey using an alternative means of transport and the remainder did not make the journey at all. 64% of city drivers used an alternative against 46% of rural drivers.

City drivers tended to use buses and taxis most as alternatives to their car, rather than walking or train. Suburban drivers used walking, buses and trains in similar proportions, while rural drivers were most likely to go by train. A small number of drivers used bikes or planes, depending on the length of the journey.

Of those who used an alternative means of transport, a third also changed the time they travelled.

Four out of ten drivers (42%) knew their route was congested because of experience or because of local knowledge. 23% found out from the radio, 13% from a TV report and 11% from a relative or friend.



Figure 1.10 Effect of congestion

“Have you given up a journey in the past 3 months because of congestion?”
 “Did you make the journey by alternative means of transport and if so, which?”

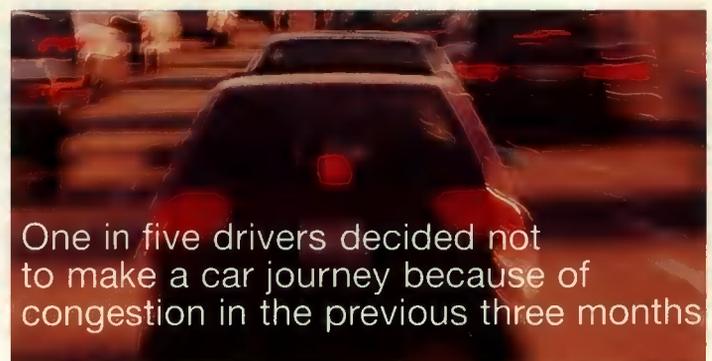
	No. of motorists
Abandoned car because of congestion	6.0 million
Gave up journey altogether	3.0 million
Switched to:	
Train/tube	1.0 million
Bus	0.8 million
Walked	0.6 million
Bike	0.2 million
Other	0.2 million

Base: All motorists (1,378)
 Source: RAC Report on Motoring 2001

1.6

What journeys could we give up?

A quarter of drivers (29%) were not prepared to – or could not – switch even one journey once a week from car to public transport. A further 14% could not name a journey they could give up. For the 59% of drivers who named a specific type of journey, shopping was the most likely to be transferred, particularly by rural motorists. While the main supermarket shop by car is unlikely to be given up, shopping for lighter items such as clothes could be done by public transport or combined with another trip. 5% of rural drivers said there was no public transport for them to use as an alternative to the car.



One in five drivers decided not to make a car journey because of congestion in the previous three months

Figure 1.11 Switching to public transport

"If you could switch one journey a week from your car to public transport, which journey would it be?"

	%	All	City	Urban	Rural
Shopping	27	21	17	19	18
Into town/city centre	16	13	13	11	16
Journey to work	12	8	12	9	7
To leisure facilities e.g. club/sport	8	6	5	6	8
Visit to relative/friend	7	6	6	9	6
School	9	2			
None - wouldn't/couldn't	19	29	25	24	30
No PT			2		
Could not specify journey	10	14	13	15	14

Base: All motorists (1,378)
Source: RAC Report on Motoring 2001

Research undertaken by RAC for its 1995 "Car Dependence" report showed that for some 20% of journeys the car is completely and unambiguously necessary; for 60% the journey may not need to be made by car but the car is the most convenient way; and 20% of car trips are optional, i.e. need not be made at all or could be made quite conveniently by alternative means.

RAC comment

Public transport has a vital role to play in certain types of journey, such as getting to the centre of cities and towns or for longer inter-urban routes. However, the poor frequency, reliability and availability of public transport are currently major restrictions on choice of travel plans. For more complex journeys, whether short or long, we value the freedom and flexibility the car provides. And, of course, we can choose whether a particular journey is actually necessary or could be done in another way, such as car sharing. However, we should not undervalue the fact that 21% of drivers have aborted a car journey because of congestion in the preceding three months and 40% of them have aborted three or more journeys. This suggests drivers' behaviour will be influenced more by pressure of congestion rather than the preference for using public transport.

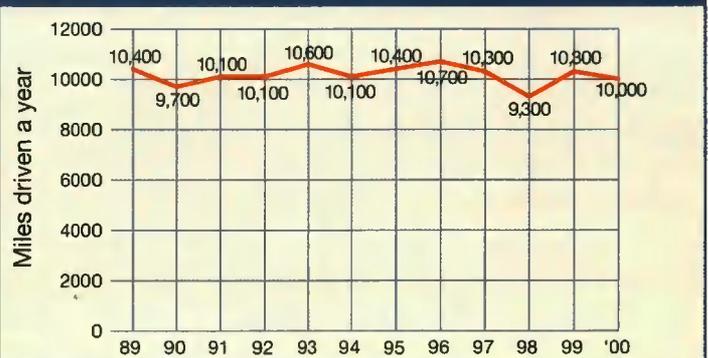


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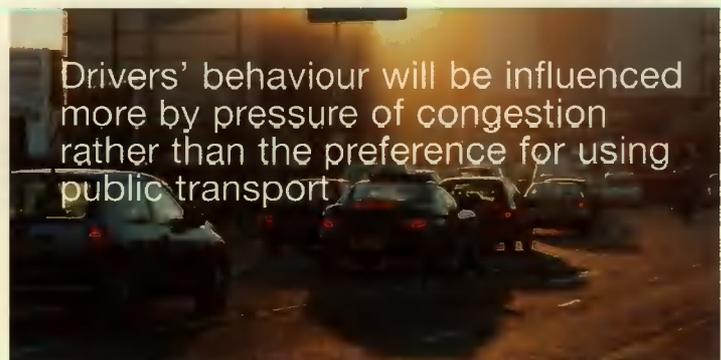
How many miles do we drive a year?

Annual mileage per car in 2000 was 10,000 miles in line with the pattern over the past 12 years and slightly higher than data recorded in the National Travel Survey. Increasing congestion, varying economic conditions and the increasing number of cars in the household do not appear to have affected mileage per car. The increase in total car mileage reflects growth in the number of cars on the road (see section 4.3).

Figure 1.12 Annual mileage



Base: All motorists
Source: Lex/RAC Report on Motoring



Drivers' behaviour will be influenced more by pressure of congestion rather than the preference for using public transport

1.8

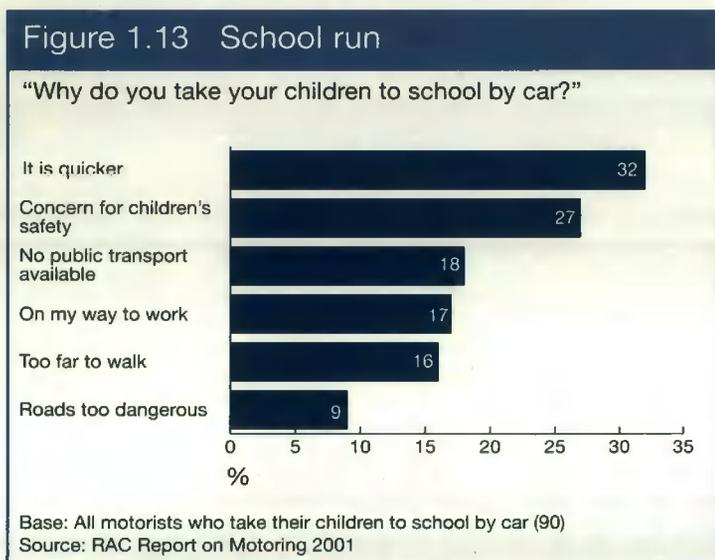
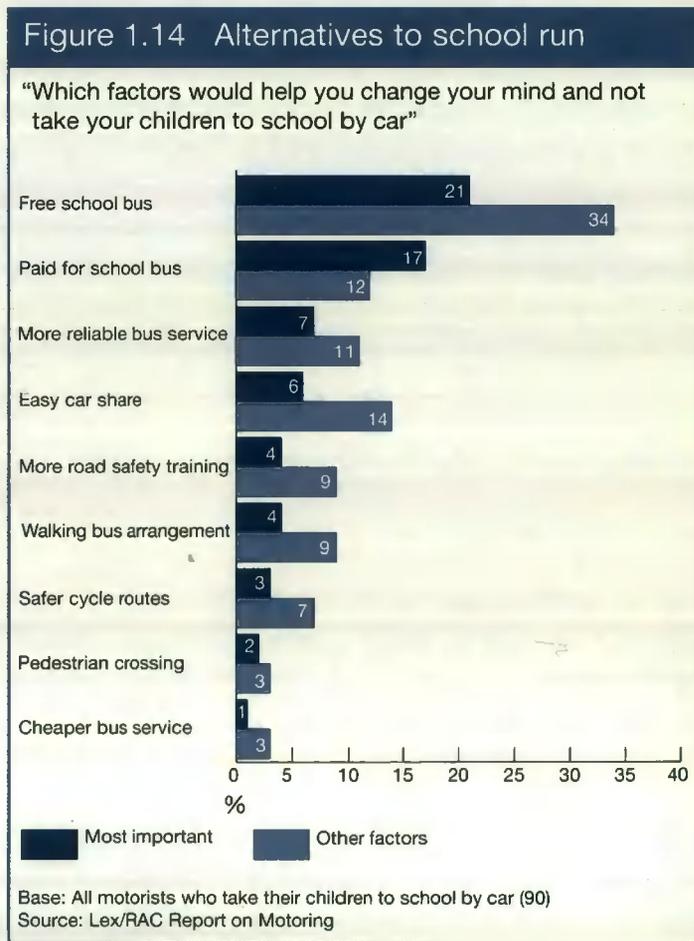
The school run – why do we do it and what would make us give it up?

A third (32%) of all regular drivers have children of school age, and of these 42% take their children to school by car. Among those who live in city centres this rises to 50%, while in rural areas it is 34%. This is equivalent to 3.6 million journeys a day, escorting children to school. Data from the National Travel Survey show that the school run represents 10% of term time traffic between 8 a.m. and 9 a.m. and 18% of peak traffic at 8.50 a.m.

The average school run is two and a half miles, with a quarter of journeys (28%) under a mile and 40% between one and two miles. The National Travel Survey shows an average distance by car of 2.6 miles; for school escort journeys under a mile, 25% are by car while for journeys of one to two miles, 79% are by car. For one car families, 55% of school journeys are by car, for multiple car households, this rises to 81%.

The main reasons for using the car are the time it takes and concern for the child's safety.

What would make drivers give up using the car for the school run? Parents were asked to name their alternatives unprompted and then were given a pre-selected list to choose further factors which would persuade them to change. Reflecting the concern expressed for their children's safety, it is not surprising that school buses seem to be the most popular – either free or paid for. There is encouraging support for walking buses – supervised groups of children walking to school using fixed routes and timetables like a conventional bus. Rural drivers mention better school buses spontaneously, but when prompted prefer the idea of better arrangements for car sharing.



RAC comment

Although only 9% of drivers with children of school age say they are reliant on the car for getting their children to school (compared with 41% for shopping), 59% choose to use the car for this journey in the interests of speed and safety. It is interesting that those living in city centres are significantly more likely to take their children to school by car than those living in rural areas. The school journey is one instance where a school bus could reduce congestion and pollution and it is clear that free or paid for school buses would be the single most effective incentive to reducing school car journeys. "Walking buses" not only remove road traffic altogether but also provide exercise for the children and can help to build community spirit for the organisers.

1.9

Are our employers playing their part with "green" travel plans?

All those in work (62% of all regular motorists) were asked whether their employers had any policies to reduce the impact of cars on the environment. 6% said "yes", 41% said "no" and 53% did not know.

Where companies had travel plans in operation, the main thrust was on car sharing. Besides measures in Figure 1.15, motorists also mentioned that their companies had looked at electric cars, changing fuel, including LPG, and giving season ticket subsidies

Drivers whose companies did not have green travel plans in operation were hard pressed to come up with suggestions, showing that the idea is not very well developed and that awareness is very low.



Figure 1.15 Existing "green" travel plans

"What policies does your company have to reduce the impact of cars on the environment?"

	%
Encourages car sharing	42
Monitors mileage/fuel consumption of cars	14
Has reduced engine size of company cars	12
Has provided new arrangements for public transport to serve work location	12
Has provided new facilities for cycles	10
Don't know	12

Base: All whose company had a policy (49)
Source: RAC Report on Motoring 2001

Figure 1.16 Suggested "green" travel plans

"What should your company be doing to reduce the impact of cars on the environment?"

	%
Nothing	16
Encourage car sharing	9
Reduce engine size of company cars	6
Provide new arrangements for public transport to serve work location	5
Offer salary benefit to switch to more fuel efficient cars	3
Monitor mileage/fuel consumption of cars	2
Provide environmentally friendly cars	2
Provide new facilities for cycles	1
Reduce number of company cars	1
Change fuel type	1
Give a season ticket subsidy	1
Ferry staff by company bus	1
Don't know	58

Base: All whose company had no policy (351)
Source: RAC Report on Motoring 2001

RAC comment

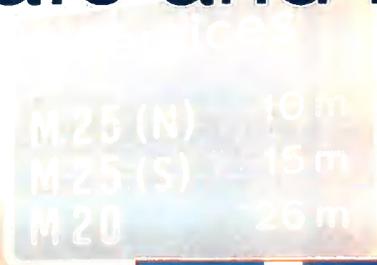
"Green" travel plans can be simple to implement and can demonstrate that companies have a real concern for the environment; not only in terms of tackling pollution by reducing car usage and congestion, but also by encouraging the use of more fuel efficient cars and cars which use LPG or even electrical power. Despite the efforts of DETR to promote their use, there is considerable ignorance amongst motorists of what such travel plans can achieve and there needs to be more campaigning to raise awareness of the benefits they bring.

Section



two

Safe and responsible motoring



How do we view activities which may distract us while driving?

How do we use mobile phones in the car?

What is the effect of tiredness? Are we under too much pressure from our employers?

Can we improve the testing of younger and older drivers?

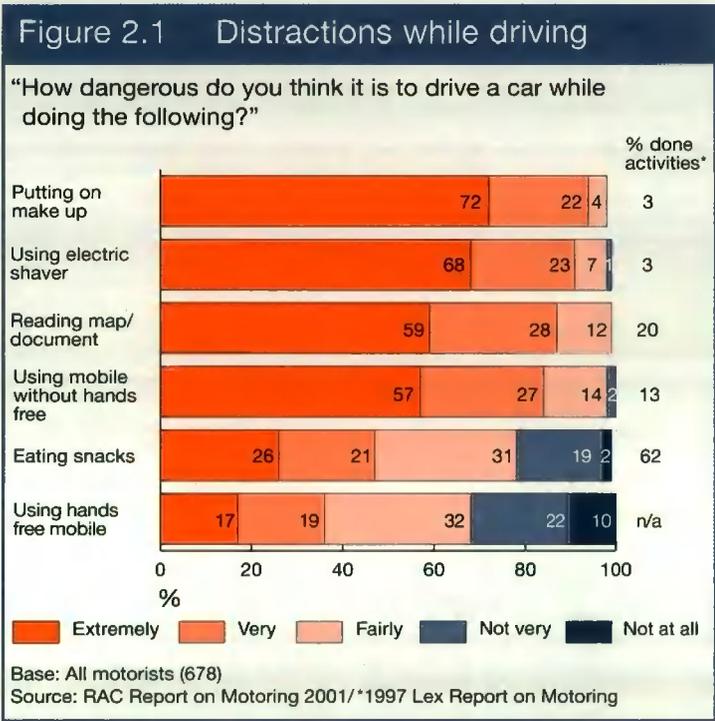
How do we view safety on motorways?

2.1

How do we view activities which may distract us while driving?

With the pressures of modern life and constant lack of time, drivers may be tempted to use time in the car to do other things besides concentrating on their driving. Fortunately most drivers view activities such as shaving, putting on make up, reading or using a mobile phone without a hands free kit while driving as extremely or very dangerous. They are less concerned about eating snacks or sandwiches or about using a hands free mobile phone although two out of five still see those activities as extremely or very dangerous. Women are generally more concerned about such activities than men, while company car drivers tend to be slightly less concerned.

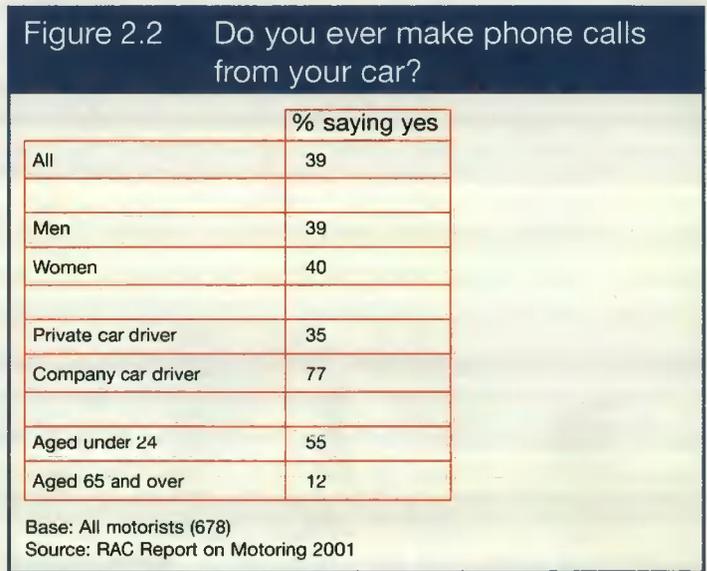
In the 1997 Lex Report on Motoring, 62% of all drivers said they had eaten a snack or sweets while driving, 20% had read a map or directions but only 3% admitted to shaving or putting on their make up.



2.2

How do we use mobile phones in the car?

Two out of five drivers (39%) make phone calls from their car, while for company car drivers this increases to 77%. Younger drivers (under 24) are much more likely to use a phone in their car (55%). By comparison, in 1997 only 13% of all drivers used a mobile phone.



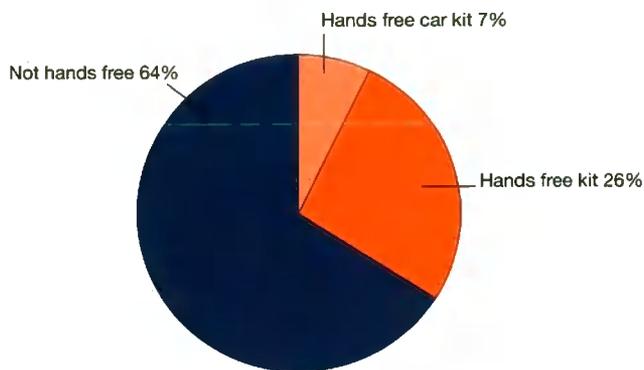
Most drivers who use phones in their car say that they do not use a hands free kit, even though 75% of these drivers acknowledge that it is very or extremely dangerous. Most of the remainder use a hands free kit which can be used anywhere, with a few having a hands free kit permanently installed in the car into which they can put their mobile.



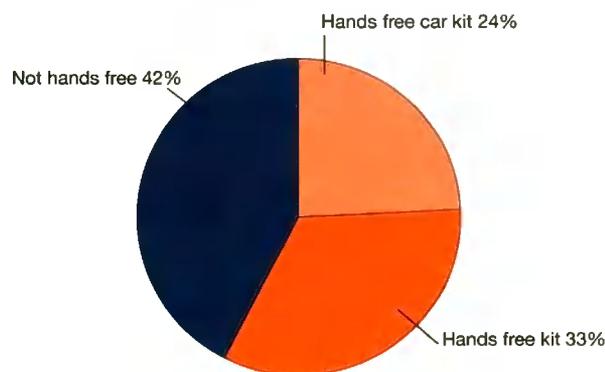
Figure 2.3 Use of mobile phones in cars

“Which type of car phone do you use?”

Private car drivers



Company car drivers



Base: All motorists who use mobile phone in car (267)
Source: RAC Report on Motoring 2001

RAC comment

Driving on today’s busy roads requires constant attention. Any distraction, be it from incoming phone calls or eating a sandwich, can take away our attention at a critical moment. Even using a hands free phone requires mental effort that is best devoted to driving. It is concerning that the hands free message is not getting through and business drivers, who clearly regard mobile phone use as essential while on the move, must encourage their employers to provide hands free kits.

2.3

What is the effect of tiredness? Are we under too much pressure from our employers?

Another effect of the constant pressure drivers are under is the temptation to continue driving when they are tired. 15% of drivers – equivalent to 4.1 million drivers in total – admit to having felt themselves falling asleep or nodding off at the wheel in the past 12 months to the extent that they had to make a conscious effort to stay awake.

A third (37%) of those who have felt tired enough to fall asleep at the wheel have driven in that state once in the past year, while nearly half (45%) admit to having done so two or three times. In 1997, 74% had driven while tired a couple of times. There is a hard core of frequent “sleep” drivers – 6% of drivers who have felt tired or fallen asleep have done so 10 or more times and they account for 26% of “sleep driving”. Sleep drivers tend to be male, under 30 and high mileage drivers.

Figure 2.4 Profile of “sleep” drivers

“In the past 12 months have you ever felt yourself falling asleep or nodding off at the wheel so that you had to make a conscious effort to stay awake?”

	% of drivers admitting falling asleep	Millions of “sleep” drivers
All	15	4.1
Men	17	2.7
Women	12	1.4
Drive over 20,000 miles a year	34	0.8

Base: All motorists (678)
Source: RAC Report on Motoring 2001



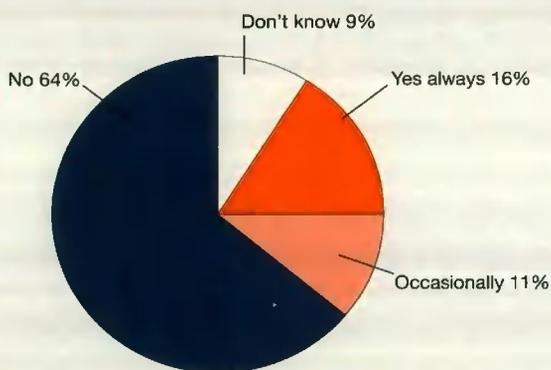
Previous research has shown that when people find themselves nodding off, they are most likely to open a window (45%) or turn the stereo up (20%). DETR research has shown that such actions have little effect. The official recommendation is to stop driving when one is tired and to take at least a fifteen minute break and a caffeine drink. According to DETR, drivers do not fall asleep without feeling the symptoms of tiredness first. However, Lex research in 1997 showed that less than half actually stopped the car, with 34% stopping for a drink and 12% for a sleep.

Part of the problem is the pressure some employees are under from employers to meet deadlines and maximise productivity. When asked, "Does your employer put you under pressure to get to your destination on time?" 16% of those in work (2.6 million drivers) feel they are always under that pressure, while a further 11% feel it occasionally. However, this is not directly due to employers setting specific business targets, as only 2% said they were set unrealistic targets "always" and 7% said "occasionally". Younger people, still climbing the corporate ladder, were more likely to feel under pressure.

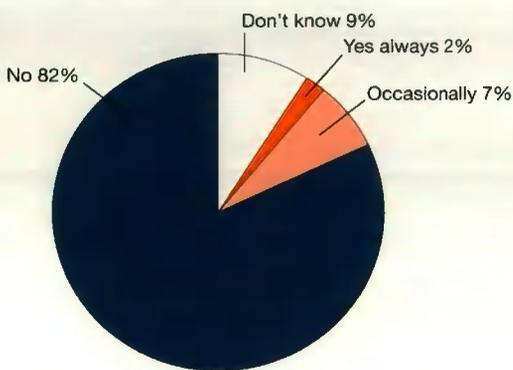
Even more worrying was the fact that 4% of working drivers felt that pressure from their employers had put themselves or other motorists at risk. Those who felt under pressure from their employers were twice as likely to have fallen asleep while driving.

Figure 2.5 Under work pressure

"Does your employer put you under pressure to get to your destination on time?"



"Does your employer set you unrealistic targets which require you to drive too fast/too long?"



Base: All motorists who are working full or part time (391)
Source: RAC Report on Motoring 2001

Figure 2.6 Falling asleep under pressure amongst those who are working

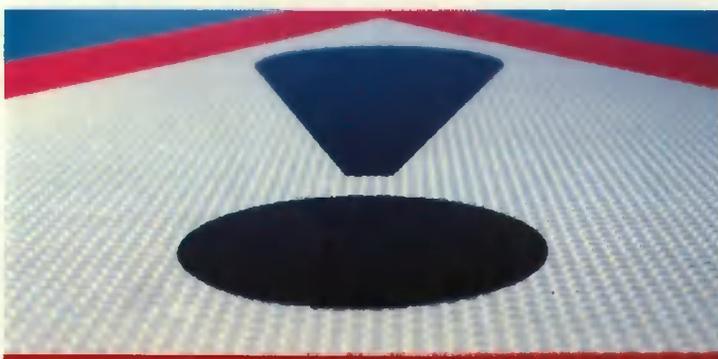
"In the past 12 months have you ever felt yourself falling asleep or nodding off at the wheel, so that you had to make a conscious effort to stay awake?"

	% of each group falling asleep
Under pressure to get to destination on time	
a) Always/occasionally	32
b) No	20

Base: All motorists who are working full or part time (391)
Source: RAC Report on Motoring 2001

Drivers in work were asked whether they had any training from their employers in safe driving or health and safety.

About 6% of drivers in work (700,000 drivers) had had training in both. A similar number had had training in safe driving only and a further 700,000 in health and safety only. 78% had had no training in either and 16% did not know whether they had or had not.



Drivers do not fall asleep without feeling the symptoms of tiredness first

RAC comment

The overall level of sleep driving is worryingly high, reflecting the increasing pressure we are under in our daily lives, especially if we are using our car for work. Careful journey planning, allowing extra time for journeys and regular rest breaks can help to overcome this problem. Risk management audits combined with driver training in the workplace programmes would create a culture of safer driving practice.

2.4

Can we improve the testing of younger and older drivers?

Statistics show that the young and the old are the most vulnerable groups of motorists, the former through inexperience, the latter through failing eyesight, hearing and slower reaction times. This is offset by the fact that older drivers do lower mileage (over 75's drive an average of 5,200 miles a year compared with 10,000 for all drivers).

A number of measures have been suggested to improve the driving standards of younger drivers and to restrict any driving by older drivers who may no longer be capable of it. Drivers were strongly in favour of all of them.

Older drivers were less in favour of the re-test of 70 year olds: only 35% of those aged 65 or over were in agreement and 50% disagreed.

Younger drivers (17-24) supported P plates (56%), but not as strongly as other drivers (82%). They were slightly less supportive of motorway training and testing (64% agreeing).

Figure 2.7 Testing of younger and older drivers

“How strongly do you agree/disagree with the following”

	% agreeing
New drivers should be required to have supplementary training and a test on motorways after they have passed their test	85
Newly qualified drivers should have a P (probationary) plate for a year after passing their test	82
Learner drivers should be required to take a minimum number of lessons with an approved instructor before taking their driving test	77
Drivers over the age of 70 should have to take another driving test to check their safety on the road	74

Base: All motorists (678)
Source: RAC Report on Motoring 2001

RAC comment

To raise the standards of learner drivers, motorists favour motorway training, probationary plates and a minimum number of driving lessons with an approved instructor. However, RAC believes an even better approach than P plates would be a compulsory graduated licence system which could, for instance, restrict the number of passengers in the first 6 to 12 months, and enforce additional certified training by a driving instructor in motorway driving and driving in adverse weather conditions. Instilling the right attitudes in novice drivers in parallel with practical driving skills is absolutely essential to securing a reduction in road accidents. Although retesting for drivers over 70 years of age received wide support among younger drivers, refresher courses could be a better solution to helping an ageing population maintain its independence and continue driving safely until they feel ready to give up.



85% of motorists feel that new drivers should have extra training on motorway driving



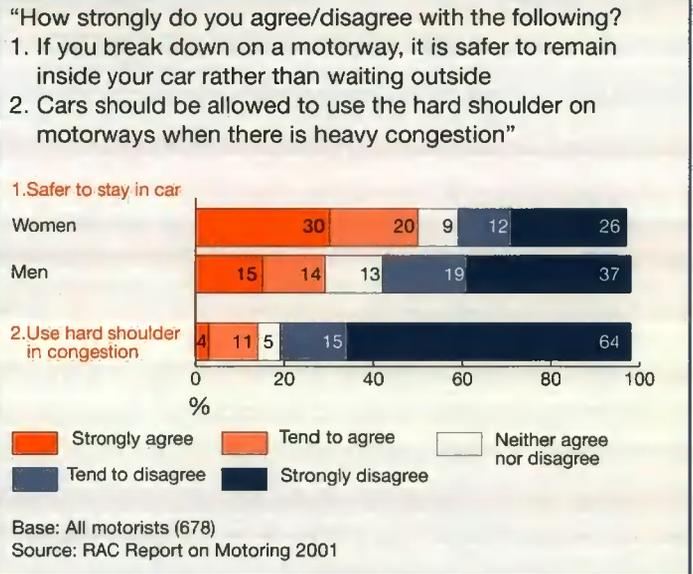
2.5

How do we view safety on motorways?

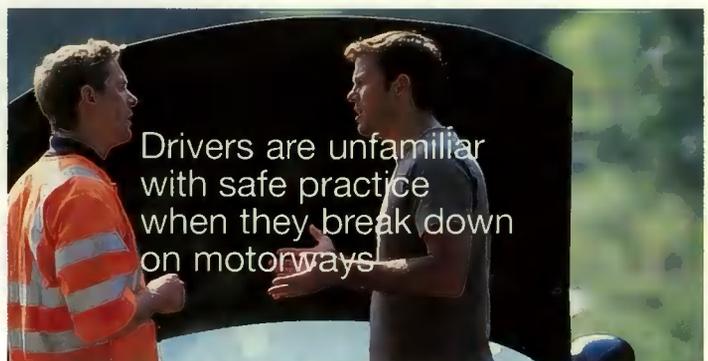
Two major topics concerning motorway safety were researched – whether drivers should remain inside their car when they break down on a motorway and whether the hard shoulder should be used to increase motorway capacity.

The official recommendation in the Highway Code (Rules 249-251) is to move out of the car when you break down on a motorway and are waiting for help to arrive. Drivers should wait well away from the carriageway or hard shoulder, in case another vehicle hits their car on the hard shoulder. Women drivers are unfamiliar with this rule, with 50% agreeing that you should stay in your car and 38% disagreeing. Men appear to be more familiar with the official recommendation with only 29% agreeing that you should remain in your car and 56% disagreeing.

Figure 2.8 Safety on motorways



Drivers were asked about using the hard shoulder on motorways as a running lane. The question was deliberately phrased to emphasise the safety aspect rather than convenience – “The hard shoulder is currently used for emergencies only. How strongly do you agree or disagree that motorway capacity should be increased by allowing cars to use the hard shoulder when there is heavy congestion?” There is strong opposition to this proposal; with 64% strongly disagreeing and only 15% agreeing.



RAC comment

While motorways are the safest roads in Britain, with only 11 accidents per 100 million vehicle kilometres compared with 50 for all roads, 250 people are killed or injured each year on motorways on the hard shoulder (SURVIVE Report, Institute of Civil Engineers, April 2000). RAC will continue to campaign for the changes highlighted in the SURVIVE Report to educate the public on the appropriate use of the hard shoulder, as well as the safety procedures they should follow which would highlight the potential danger of drivers and passengers remaining in their cars. The use of the hard shoulder to increase capacity is potentially very dangerous as it makes it harder for emergency vehicles to reach an accident.



Section



three

■ Motoring for leisure



How often do we take the car abroad?

How well prepared are we with insurance and what problems have we experienced?

How often do we use our car on holiday in Great Britain?

How do we plan our route and monitor road conditions?

3.1

How often do we take the car abroad?

10% of drivers have taken their car to the Continent in the past year. Most (69%) only make one journey a year but 15% make three or more journeys annually. This is equivalent to 4.5 million return cross Channel journeys (9.0 million crossings) which is broadly in line with the official statistics of 4.8 million ferry crossings and 3.3 million Eurotunnel crossings.

The most frequent car travellers are those aged 34-54 with children; younger and older people are more likely to go abroad by plane, possibly hiring a car at their destination.

3.2

How well prepared are we with insurance and what problems have we experienced?

Seven out of ten drivers prepare themselves well when they go abroad and take out insurance for both their car and their personal medical expenses and baggage. That still leaves some three quarters of a million drivers each year vulnerable to mishaps for which they are not covered.

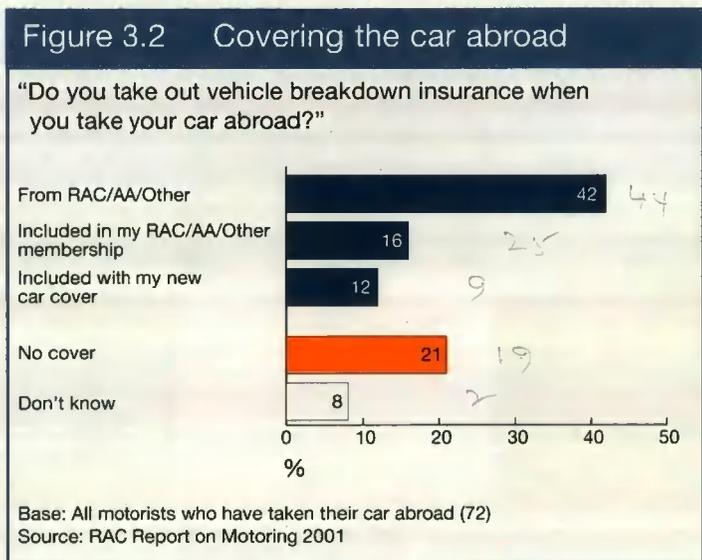
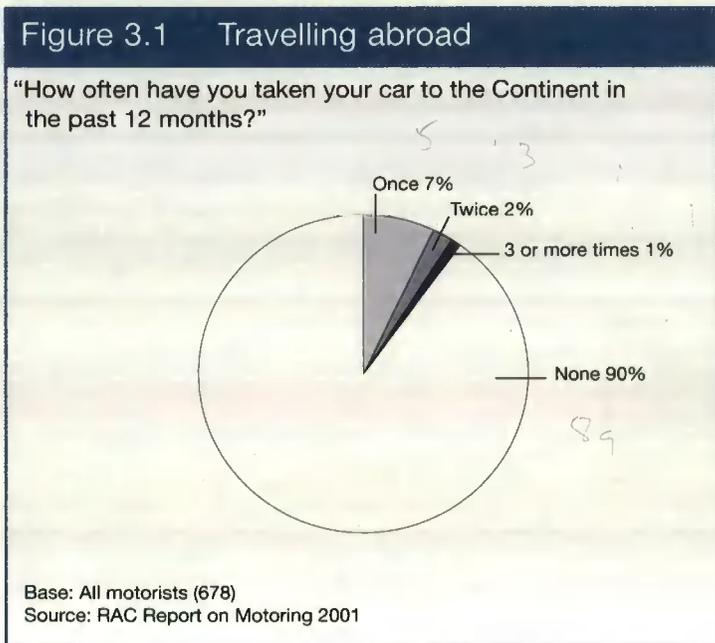
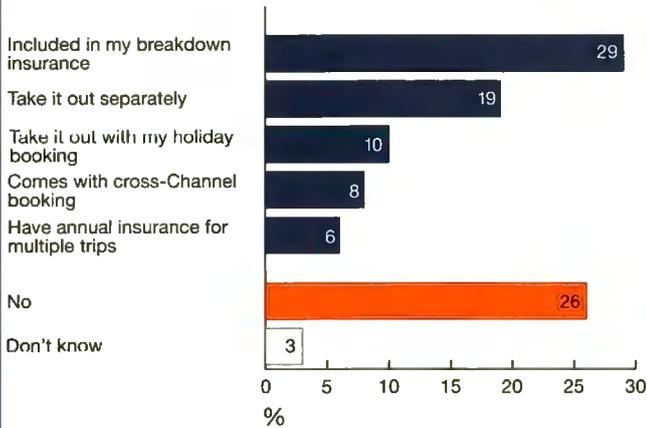


Figure 3.3 Covering the driver abroad

“Do you take out vehicle personal insurance (medical expenses and baggage) when you take your car abroad?”



Base: All motorists who have taken their car abroad (72)
Source: RAC Report on Motoring 2001

Of those who take their car abroad, one in six drivers (18%) – equivalent to half a million drivers each year – experienced a problem with their car. Typical problems were overheating, punctures and battery failure, while accidents and other mechanical breakdowns were less frequent. Those who did not take out insurance were as vulnerable to problems with their cars as those who did. Younger cars were as likely to have problems as older ones.

RAC comment

Of the drivers that take their car abroad each year, three quarters of a million go on holiday without any breakdown cover – a particularly worrying finding when one in six drivers experiences car problems on those journeys, despite the reliability of modern cars. Adequate personal and vehicle breakdown insurance is an inexpensive and wise precaution, bearing in mind that it costs from £600 to £4,000 to repatriate a vehicle to the UK, in addition to the hassle of finding a suitable service provider and overcoming any language barriers.

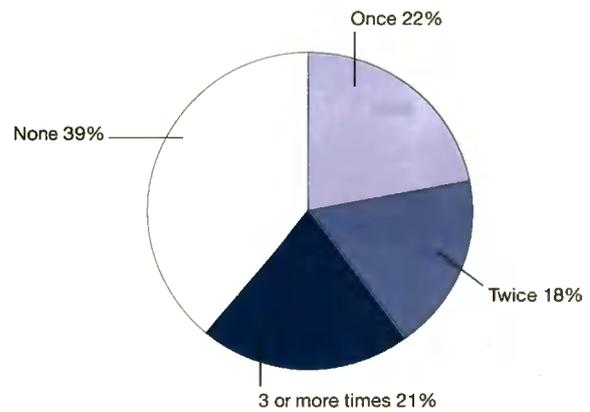
3.3

How often do we use our car on holiday in Great Britain?

Holidays by car and short trips involving overnight accommodation in Great Britain are much more frequent than overseas trips, with 61% of drivers having taken at least one break in the past year. On average, Britain’s motorists make 1.5 such trips a year, totalling nearly 40 million trips.

Figure 3.4 Holidays in Britain

“How often have you taken your car on holiday or short break in Great Britain in the past 12 months?”



Base: All motorists (678)
Source: RAC Report on Motoring 2001



3.4

How do we plan our route and monitor road conditions?

Old “technology” – maps and road signs – remain the most popular methods for planning long journeys. Even if drivers have planned the route in advance, using a map, they rely on road signs when they are on the journey. One in eight drivers trusts their memory because they travel on routes they know.

Around 10% of drivers use electronic technology such as computer software or the internet. However, they still trust the old fashioned methods, with 76% also using a map book or road atlas.

Company car drivers use a wider variety of methods for planning their routes as they do higher mileages and more varied journeys and it is more important that they arrive on time. They are much less likely to rely on routes they know. One in seven company car drivers uses Trafficmaster, which uses a system of sensors on motorways and main roads to monitor traffic flows and feeds the information to a variety of in-car systems. This rises to one in five where the car is provided by an employer rather than business expense.

The mobile phone information services provide up to the minute information about road conditions by phoning a specific number, such as 1740 for the RAC service. The system can monitor which mobile phone “cell” the driver is calling from, and reports on traffic around that area, allowing the driver to select information about a specific road.

On the journey itself, new technology still has to make an impact on how drivers monitor traffic conditions with roadside signs and local traffic broadcasts being the main sources of information. One in eight company car drivers uses Trafficmaster and one in ten uses a mobile phone. There appears to have been a significant increase in the use of electronic technology since a similar question was asked in 1997. Then only 6% of drivers had used electronic technology in the past three months to plan or change their route.

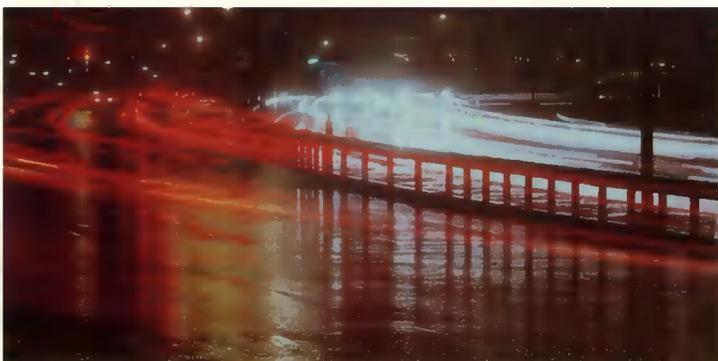
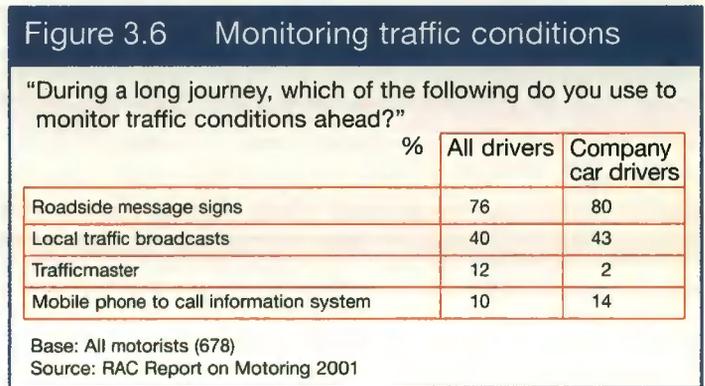
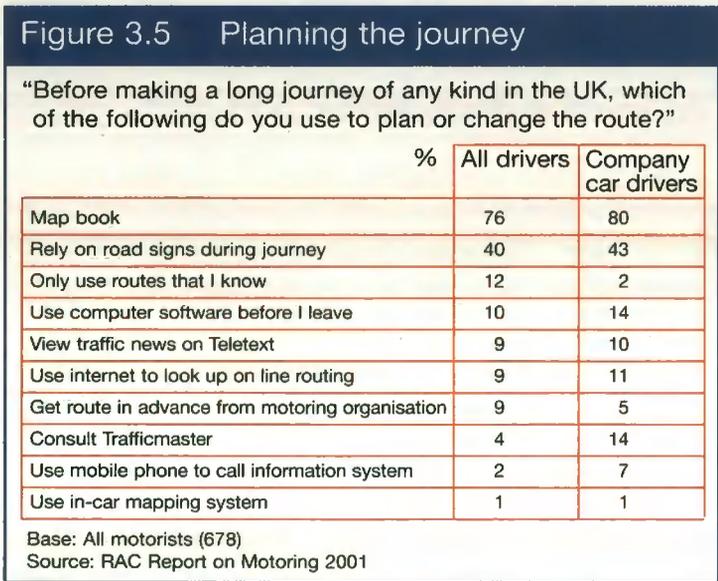
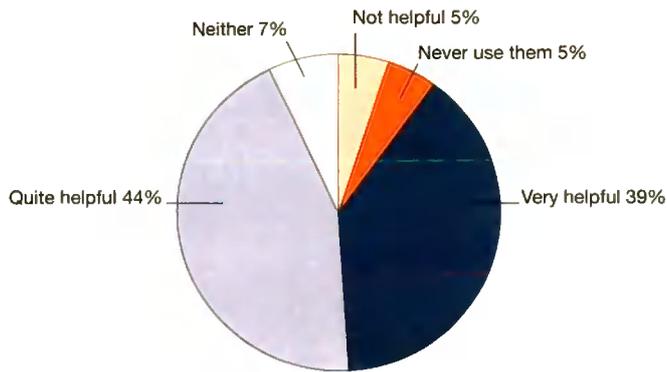


Figure 3.7 Value of temporary signs

“How useful do you find the temporary direction signs put up by RAC and the AA for specific events?”



Base: All motorists (678)
Source: RAC Report on Motoring 2001

RAC comment

Careful planning of the route in advance for a long trip, or one that is likely to be congested, and good information en route are important for a safe and stress free journey. Road atlases need to be regularly replaced if they are to stay up to date and it is encouraging that the government plans to invest in better road signs, including variable message signs. Clearly information must be current and more widely available. Internet route planning services could be used more, as could mobile phone traffic and travel information services, such as RAC's 1740 service. The mobile phone technology can pinpoint the driver's location to provide up to the minute information about the route and the surrounding road network, allowing for quick, safe and stress free last minute route changes.

Temporary direction signs provided by RAC and the AA are seen as valuable by the vast majority of drivers, with 83% saying they are useful and only 5% saying that they never use them. Better signage is a key priority for drivers as shown in section 4.



Section



four

Motoring in the future



What would we change about our cars, the roads, traffic and travel information?

What do we think will happen by 2010?

How many cars do we have now? How many do we expect to own in the next two years?

How long do we keep our cars?

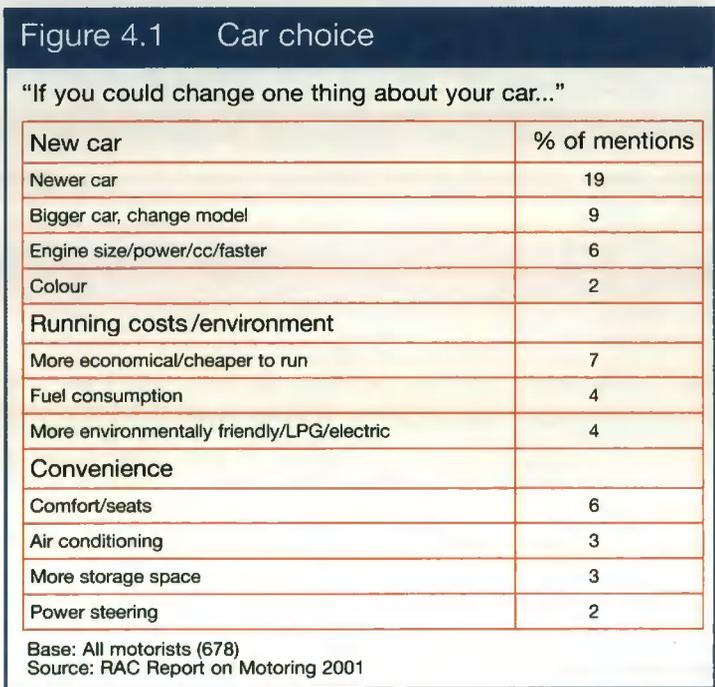
How many cars would we have if money were no object?

4.1

What would we change about our cars, the roads, traffic and travel information?

Drivers were given an open opportunity to express their priorities for change – “If you could change one thing about the following, what would you change about cars, the road system, traffic and travel information.” The responses represent the key “top of mind” features motorists would like to change.

Typically a third say “nothing or no change”, with younger drivers more likely to seek a change and older drivers less likely to offer a response. A number of drivers who did not want any change expressed a feeling of warmth towards their car: they were happy with their car as it was, it was very reliable, it had served them well, “it’s been a wonderful little thing”.



Despite the research being undertaken during the fuel crisis in September 2000, improved fuel economy was not top of people’s wish list for change. More important is the newness of their car – i.e. they would like a newer or larger car or they would like to change the model, e.g. from a saloon to a hatchback.

The next group of aspirations concerned running costs. The response “environmentally friendly” appears to be more an expression of a genuine concern for the environment rather than as a coded wish for lower fuel consumption. Drivers in rural areas are nearly twice as concerned about running costs and the environmental friendliness of their cars as those elsewhere but are less likely to mention fuel consumption.

Air conditioning is becoming increasingly common as a standard feature and is thus rising up motorists’ wish lists. Older drivers would like power steering and automatic transmission.

Company car drivers are looking for more comfort and are more concerned about changing the model or size of their car. They also mention satellite navigation as a desirable feature.

Some of the more creative ideas which motorists mentioned were:

- Self cleaning cars (including the interior)
- Have someone else to drive the car for me
- Ability to foresee problems ahead
- TV in the back for the children
- Cars made of carbon fibre



Drivers would like newer cars with lower running costs

Figure 4.2 Changes to the roads

"If you could change one thing about the road system..."

	% of mentions
Improvement of infrastructure	25
Suggestions included: Well planned road system e.g. links/one-way systems Widen motorways/more lanes More dual carriageways More by-passes Remove traffic lights/more roundabouts/underpasses Get rid of small roundabouts More cycle lanes Build more roads More motorways	
Road condition	18
Suggestions included: Repair/maintain the roads Improve signage Too many roadworks/coning off of roads	
Congestion	16
Suggestions included: Fewer cars/less congestion Get HGV's off the road and onto rail Fewer bus lanes Toll roads	
Safety	11
Suggestions included: Increase/decrease speed limits Get rid of speed humps More variable speed limits Enforce lane driving More speed bumps	

Base: All motorists (678)
Source: RAC Report on Motoring 2001

Note that many of the recommendations could fall into several categories – for example, building by-passes can reduce congestion and improve safety.

The suggestions to reduce the number of cars and to get trucks off the road or to travel by night would reduce congestion. This appears to be for the respondents' own convenience to make it easier to drive and is reflected in comments such as: "Keep everyone else off the road", "In a perfect world, fewer cars, more room", "I would pay to have fewer cars on the road", "Just take the cars off", "Take half the traffic off the road".

Drivers are very concerned about improving road maintenance and better signage, often expressing complaints about inconsistent and poorly sited signs. Their suggestions about improving the road network itself are largely directed towards local improvements – road widening, bypasses and underpasses – rather than building new roads or motorways. This echoes previous Lex Reports on Motoring where motorists were generally against building new roads as a way of reducing congestion.

Speed limits are felt to be inappropriate – both too high and too low. Speed bumps get a thumbs down, with three times as many drivers wanting them to be removed as want them to be increased. Some people want more traffic lights replaced by roundabouts while others find mini-roundabouts are a nuisance.

Other specific suggestions were:

- Allowing left turns on red lights and overtaking on the left – similar to the systems operating in most of the USA
- Companies working together when digging up roads
- Put the speed limit on the back of speed cameras
- More substantial road resurfacing so that roads last longer and there are fewer road works
- Get rid of the bus lanes, they're empty while the rest of the roads are crowded
- Cover all potholes – "we pay enough road tax to pay for it"
- Improve legibility of road signs, e.g. remove trees which block them
- Provide better and less expensive motorway services
- Create a fast response unit to clear motorway accidents away quickly

Some people expressed satisfaction: "The road system is already good compared with other countries" but others suggested "A complete and utter overhaul", "Anything would be better".



Figure 4.3 Changes to traffic and travel information

"If you could change one thing about traffic and travel information..."

	%
More updates	10
More of it/more frequent	10
Better information on local radio	7
More use of road signs	4
More detailed information	3
More easily accessible	3
Information unit fitted as standard in car	2

Base: All motorists (678)
Source: RAC Report on Motoring 2001

Drivers found it harder to think of things to change about traffic and travel information with 59% giving no response, some because they only make short journeys and others because they are satisfied or feel they are self sufficient: "I make my own route".

Motorists want more frequent information that is kept up to date: "It's an hour old when you get it". The radio is the most convenient method of receiving information and drivers would like a radio station exclusively for travel news.

Specific requests included:

- More electronic displays before you hit congested zones
- Suggestions for an alternative route to bypass incidents
- More road signs indicating problems ahead and weather conditions
- Radio announcers to speak more slowly
- Cancellation of messages when the problem is cleared



4.2

What do we think will happen by 2010?

In the early years of the Lex Report on Motoring drivers were asked what they expected would happen by 2001 – then 10 years away. In 2000 these predictions were reviewed – seven had come about, such as the completion of the Channel Tunnel; seven were under consideration or becoming a reality; while eight, including raising motorway speed limits to 100mph, were not a foreseeable reality.

This year motorists were asked whether they think 12 motoring related possibilities will come about by the year 2010.

Figure 4.4 shows what proportion of drivers think these features will or won't happen as well as a net sum – those who say "it will happen" minus those who say "it won't".

Drivers believe that they will be taking more advantage of technology to reduce driving or to make it easier. A net 55% believe that over half of people who currently work in offices will work at home via computers or terminals. As commuting accounts for about a fifth of annual car mileage (National Travel Survey), this change could reduce car mileage by the equivalent of 10 years' growth in traffic. 38% believe all new cars will have automatic route guidance systems. A net 37% think over half will do their shopping by computer with home delivery.

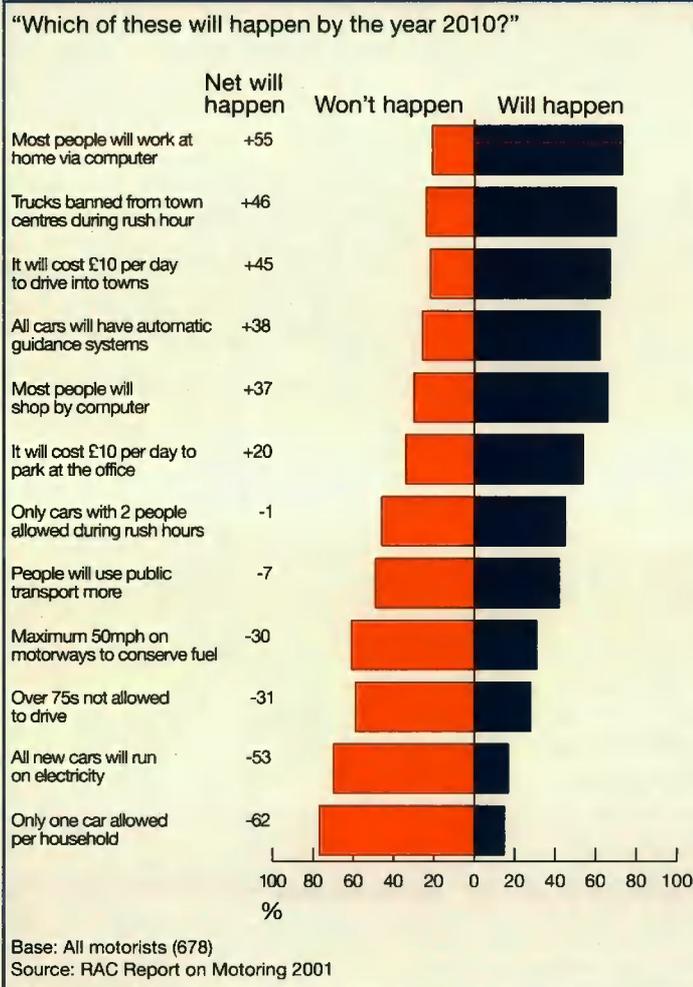
They also expect to pay £10 to drive into city centres (net 45%) or to park at the office (net 20%). With a half of drivers using their cars to commute and half of those using work parking places, a £10 a day office parking charge could generate £16 billion a year, although in practice many people would find other places to park or ways of getting to work. Drivers expect trucks to be banned from city centres during the morning and evening rush hours (net 46%).



They are reasonably confident that the following will not come about: a 50mph speed limit on the motorway to conserve fuel (-30%), a ban on over 75s being allowed to drive (-31%), all new cars will run on electricity (-53%) and a limit of one car per household (-62%).

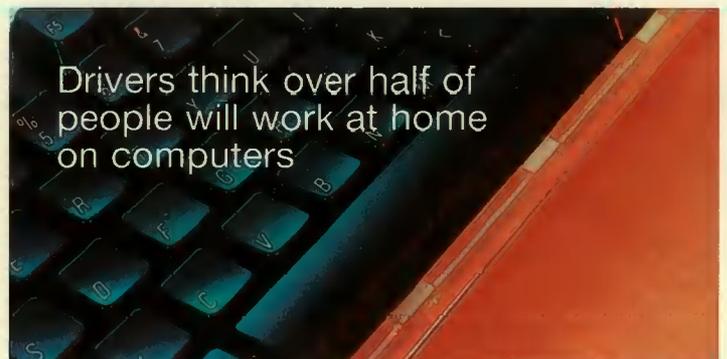
There is little difference in attitude of different groups of motorists – surprisingly older drivers are no more likely to oppose a ban for over 75s. Company car drivers are less likely to think that they will be restricted to one car per household – net 78% thinking it will not happen. Views of internet regulars are covered in section 6.6.

Figure 4.4 What will happen by 2010?



RAC comment

Motorists' concerns about congestion are not matched by their support for transport measures proposed to reduce car journeys, such as road tolls and cycle lanes. While they believe that a majority will both work and shop from home in the future, the challenge remains for the government to find traffic reduction solutions which motorists will readily accept. Motorists' concerns about the condition of our roads will hopefully be met through the increased funding announced for road maintenance. The widespread concern over the condition and visibility of road signs does need urgent attention as they affect both road safety and journey management. Government changes to VED and company car tax should go some way to narrowing the gap between drivers' top choice for a newer car and the much lower priority accorded to the fuel efficiency and environmental friendliness of their vehicle.



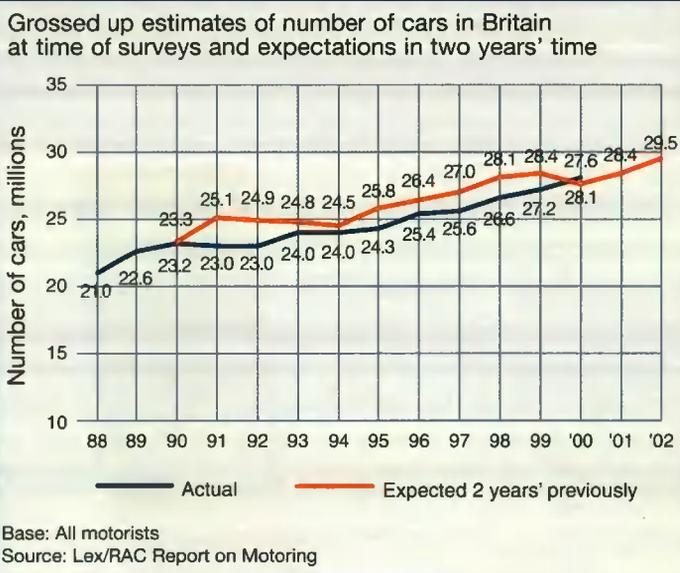
4.3

How many cars do we have now? How many do we expect to own in the next two years?

The trend towards increased car ownership continues unabated – 72% of households in Britain now have a car (Family Expenditure Survey). Of those households with regular motorists, 56% have only one car, 34% have two and 10% have three or more, giving an average of 1.57 cars per household (with regular drivers). The trend is expected to continue, with the number of households with three or more cars rising to 10% in the next two years. This would result in an average of 1.62 cars per household, equivalent to putting an extra 0.7 million cars on the road annually. In 2000, for the first time, the actual number of cars on the road has exceeded the forecast made in the Lex/RAC surveys two years' previously.

Only 15% of drivers expect a change in the number of cars in their household in the next two years. Of those who expect an increase, about 85% expect to have just one more car.

Figure 4.6 Current and future car ownership



The actual growth in the number of cars over the last 12 years is:

Number of cars in 1988	21.0 million
Increase due to increase in number of households	3.4 million
Increase due to more households now having cars	2.0 million
Increase due to more cars per household	1.7 million
Number of cars in 2000	28.1 million

Figure 4.5 Current and expected levels of car ownership

% of households		None	One car	Two+ cars
Actual	1988		61	39
Actual	1989		55	45
Actual	1990		56	44
Actual	1991		58	42
Actual	1992		59	42
Actual	1993		58	42
Actual	1994		58	42
Actual	1995		53	47
Actual	1996		58	42
Actual	1997		51	49
Actual	1998		59	41
Actual	1999		57	43
Actual	2000		56	44
Expected in 1999 for	2001	1	51	48
Expected in 2000 for	2002	1	51	48

Base: All motorists
Source: Lex/RAC Report on Motoring



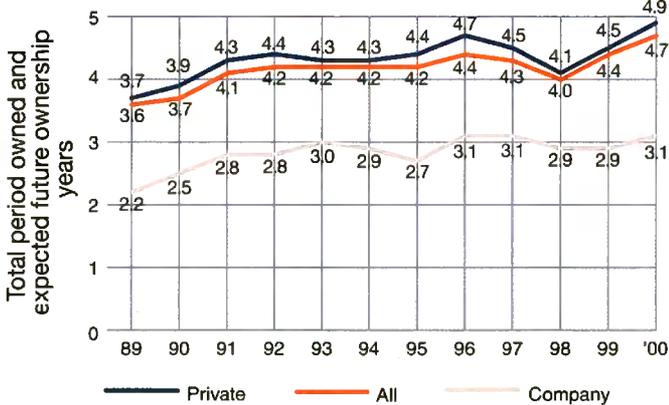
4.4

How long do we keep our cars?

The question asked was: "Thinking about the car you drive most often, in total how long do you think you will keep your current car?", combining the number of years already owned plus the number of years it is likely to be kept. There is therefore an element of prediction about length of future ownership. Over the past 12 years the trend to increased length of ownership for both private and company cars is quite clear. This year, the expected length of ownership by private drivers has risen to its highest level, possibly as a result of drivers holding off replacement anticipating lower car prices. Company car drivers have not changed their ownership expectancy so much.

Figure 4.7 Length of ownership

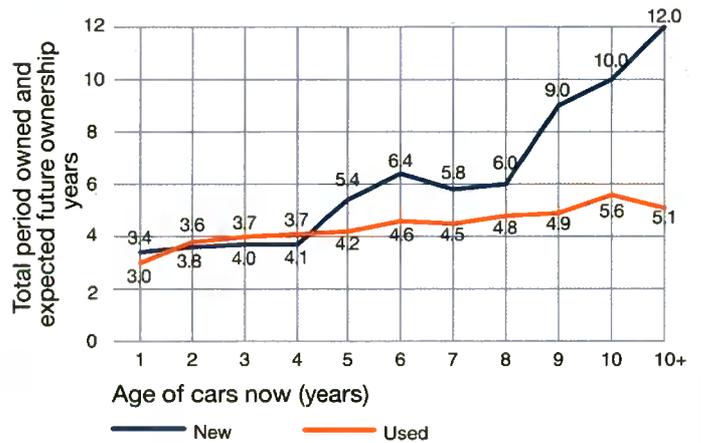
Private versus company cars



Base: All motorists
Source: Lex/RAC Report on Motoring

Figure 4.8 Average length of ownership

New versus used cars by age of car now



Base: All motorists (1,378)
Source: RAC Report on Motoring 2001

4.1 Drivers of new cars fall into two groups, firstly, those who always change their cars after three to four years (company car drivers and others who always want to have a young or new car), and secondly, those who keep their car from new for a long time. Those who buy used cars, however, change them on a more consistent four to five year cycle.



People are keeping their cars longer

4.5

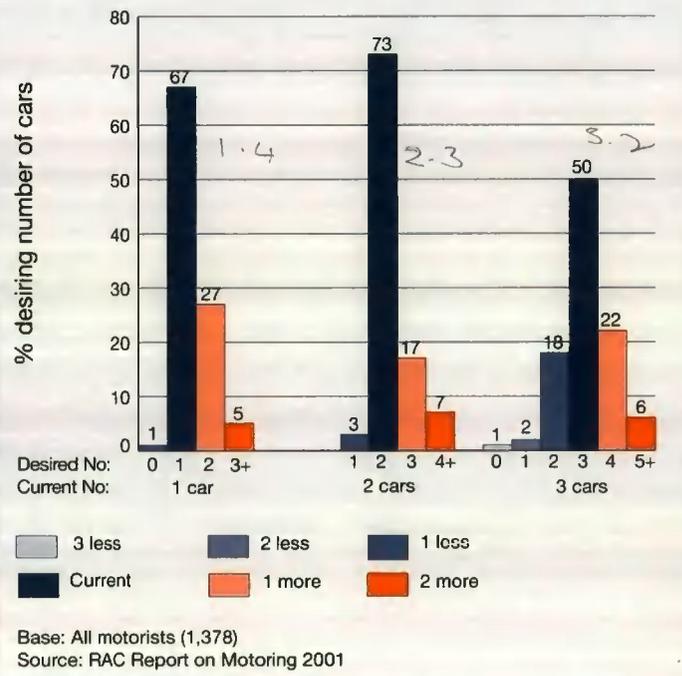
How many cars would we have if money were no object?

When asked how many cars they would have if people in the household could afford as many cars as they liked, the average response was 1.92 cars per household. This is equivalent to 34 million cars in Britain, an increase in car ownership of some 6 million cars, the same as 8 to 10 years' annual growth. One in four households (24%) would like more cars but most (79%) would only want one extra car. Some households with larger numbers of cars would like to reduce the number of their cars. Aspirations are slightly lower than in 1995 when the same question was asked. Then, motorists aspired to 2.01 cars per household compared with actual ownership of 1.50 at the time.

This analysis does not take account of the 28% of households with no car at all (1996 Lex Report on Motoring). 24% of these households said the reason they did not drive was because they could not afford a car. If they could all achieve their objective, this would add another 1.6 million cars. However, this is balanced by the similar proportion (24%) of non-drivers who said they did not see the need to drive, did not enjoy driving or preferred public transport.

Figure 4.9 Ideal number of cars

"How many cars do you think there would be in your household if your household could afford as many as they liked?"



RAC comment

The Lex/RAC Reports on Motoring have been remarkably consistent in their predictions of the growth in car ownership, which has grown steadily in the past 12 years despite the pressure of increasing congestion. The extension to the replacement cycle means that there are fewer new cars being bought and therefore it will take longer to achieve environmental improvements. While motorists' ambitions to own more cars may not be achieved, they do give another measure of the pre-eminence of the car in people's travelling choices bearing in mind the cost of an additional car journey is very small.



Section



This section uses the Motability and Disabled Drivers' Association sample ("Disabled Motorists" sample) to compare the attitudes of disabled motorists with all motorists. See page 81 for details of the sample.

five

Motoring and disabled people



How many orange badge holders are there?

What are the characteristics of disabled drivers?

How do disabled drivers adapt their cars?

How reliant are disabled drivers on their cars and how often do they use other means of transport?

How do disabled drivers manage with parking?

What should be done to improve conditions for disabled drivers?

How can breakdown organisations help disabled drivers?

5.1

How many orange badge holders are there?

The term “orange badge holders” is used to describe all those who have an old style orange badge or a new blue EU disabled drivers’ badge. The definition of eligibility is “those who are unable to, or virtually unable to, walk or have a severe disability in both upper limbs”. There are 1.9 million orange badge holders in the UK but only those who receive the higher rate mobility component of the disability living allowance or the war pensioners’ mobility supplement – approximately 1.4 million people in total – are eligible to be Motability customers.

The main survey provided 89 drivers with orange badges, equivalent to 1.7 million disabled drivers. It also provided 27 people whose car was funded by Motability – equivalent to 0.5 million cars in total, compared with 0.4 million currently in the Motability scheme, which is within statistical error. There can also be orange badge holders, who may not be drivers, in the same households as the respondents. The analysis in this section compares disabled motorists (from the special “Disabled Motorists” sample of 104) with orange badge holders and all motorists from the main survey.

33% of disabled drivers use a wheelchair. 63% of disabled drivers say they are not able to use alternative forms of transport.

5.2

What are the characteristics of disabled drivers?

Figure 5.1 Comparison of key characteristics

	%	Disabled motorists*	Orange badge holders†	All motorists†
Men		63	67	58
Women		37	33	42
Age 65+		23	36	16
Working		6	8	62
Drive every day/most days		81	81	87
Current cars per household		1.29	1.37	1.57
Projected cars per household in two years' time		1.30	1.26	1.62
Ideal no. of cars per household		1.53	1.53	1.92
Average age of cars (years)		1.8	6.6	7.8
Expected length of ownership (years)		2.8	5.5	4.7
Average mileage		7,800	6,500	10,000

Base: †All motorists (1,378) / *Disabled motorists (104)
Source: RAC Report on Motoring 2001



There are 1.9 million orange badge holders in the UK

5.3

How do disabled drivers adapt their cars?

Just over half of those with wheelchairs have had their car adapted, mainly to enable hand control. Very few non-wheelchair users have had their car adapted. In total, about a quarter of cars used by disabled people – 0.1 million cars – have been adapted.

Figure 5.2 Adaptation of cars

	%	Wheelchair users	Non-wheelchair users
Car was adapted on purchase	50	6	
Car adapted after purchase	6	1	
Hand controls installed	42		
Accelerator adapted	32	17	
Knob on steering wheel installed	26	67	
Side lift/wheelchair mount installed	21		
Power steering	16		
Seat adapted	11	17	
Automatic	11		
Brake on steering wheel installed	11		

Base: Disabled motorists (104)
Source: RAC Report on Motoring 2001

5.4

How reliant are disabled drivers on their cars and how often do they use other means of transport?

Figure 5.3 Reliance on car

		%	Disabled motorists*	Orange badge holders†	All motorists†
I would find it very difficult to adjust my lifestyle to being without a car	Strongly agree	88	84	68	
	Agree	7	12	18	
What would you miss most if you did not have a car?	Sense of freedom	72	59	42	
	Ability to get to work	–	1	21	
	Ability to do shopping	13	17	12	
What else would you miss?	Ability to do shopping	50	32	29	
	Visiting relatives	42	23	20	
	Going to leisure activities	32	22	26	
	Ability to get to work	3	4	15	
I don't care what car I drive as long as it gets me from A to B	Net agreement (% agreeing less % disagreeing)	+4	+26	+12	
I consider the type of car I usually drive reflects my personality	Net agreement	-14	-14	-19	
I would use my car less if public transport were: – easier for disabled people to use	Agree	+28			
	Disagree	-61			
– better	Agree		+21	+36	
	Disagree		-68	-52	
What would make public transport better?	More frequent services	17	33	49	
	Cheaper fares	10	35	43	
	More reliable services	21	33	38	
	Closer to home	24	10	13	
	Better facilities for disabled people	35	14	1	
	Easier to get on/off/better wheelchair access	25	–	–	

Base: †All motorists (1,378)/ *Disabled motorists (104)
Source: RAC Report on Motoring 2001

A much higher proportion of disabled drivers say that they could not adjust their lifestyle to being without a car (88% strongly agreeing compared with 68% for all motorists). Their lives are so dependent on the car that they feel strongly that they would lose their sense of freedom as well as their ability to shop or to visit relatives. They also specifically mention they would lose their independence and be unable to get to vital appointments, such as at the hospital.

When older disabled drivers (over 65) were asked what would make them give up their car, most said "ill health" (63%) or "if their disability got worse" (25%).

Because of their sense of dependence and recognising that they would need a car suitable for their needs, disabled drivers are more concerned than other motorists about what car they have and they are less likely to feel that their car is an extension of their personality. However more disabled drivers have given their car a name (23%) than all motorists (11%).

Dependence on their car means that disabled drivers are unlikely to switch from their cars to public transport even if it were easier for them to use – a net 33% would use their car less. The question put to all motorists is whether they would switch if public transport were better. A net 16% would not.

Figure 5.4 Frequency of checking tyres, oil level, lights and windscreen washer water level

	%	Disabled motorists	All motorists
Once a week or more frequently		31	19
Once a month		31	23
When I think it needs doing		13	20
When I go on long journey		4	7

Base: All motorists (1,378)/ Disabled motorists (104)
Source: RAC Report on Motoring 2001

To ensure the availability and reliability of their cars, they are more conscientious about checking their tyres, oil, water and lights.

About a quarter (24%) of disabled drivers carry out the checks themselves, 40% use a local garage and 30% ask a friend, relative or neighbour to do the checks for them.



To make public transport easier to use, it would need to have more specific facilities for disabled people, such as easier access and facilities for wheelchairs. It would also have to be nearer to home and more frequent. Cost is not a major issue because registered disabled people can receive free or subsidised travel.

Those disabled drivers who were able to use public transport (36% of the total) were asked what they used cars, buses and trains for nowadays. The results were compared with the equivalent question asked of all motorists in last year's RAC Report on Motoring.

Figure 5.5 Use of public transport

%	Car		Buses or coaches		Train/underground	
	Disabled motorists	All motorists	Disabled motorists	All motorists	Disabled motorists	All motorists
Travel to/from work	11	51	3	4	3	5
Travel in connection with your work	11	25	0	2	0	6
Visiting family & friends	92	87	11	5	16	7
Going shopping	95	90	24	9	5	9
Going to sports/leisure/entertainment	57	60	14	7	8	9
Taking children to school/group	14	25	0	1	0	0
Never use it	0	0	59	81	76	75

Base: All motorists (1,563)/ Disabled motorists (104)/ *Those able to use public transport (37)
 Source: RAC Report on Motoring 2000/2001

Disabled drivers almost universally (95%) use their car for shopping and visiting family and friends (92%). As only 6% of the disabled drivers in the sample are in work and only 21% have school age children, compared with 32% of all drivers, they make fewer work or school journeys by car.

Three out of five disabled drivers who can use public transport never use buses and three out of four never use trains.

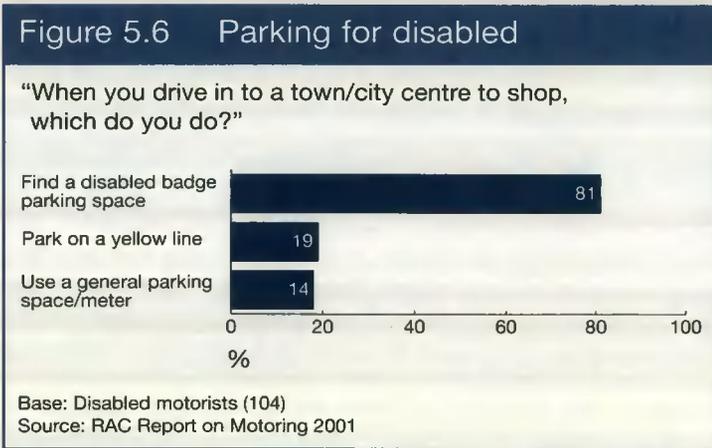
Disabled drivers react to congestion in a similar way to all drivers. A quarter had decided not to make a journey by car because of congestion. Whereas 52% of all drivers used alternative means instead, only 15% of disabled drivers did so bearing in mind that many say that they cannot use public transport at all.



Disabled drivers use their car for shopping and visiting friends

5.5

How do disabled drivers manage with parking?



Disabled drivers are usually successful finding a disabled space when they go shopping, although it does seem to take them somewhat longer to find a parking space than all motorists, despite dedicated facilities. If they do not use a specially reserved space, disabled drivers park on yellow lines or use parking meters, which are generally free for those displaying an orange badge.

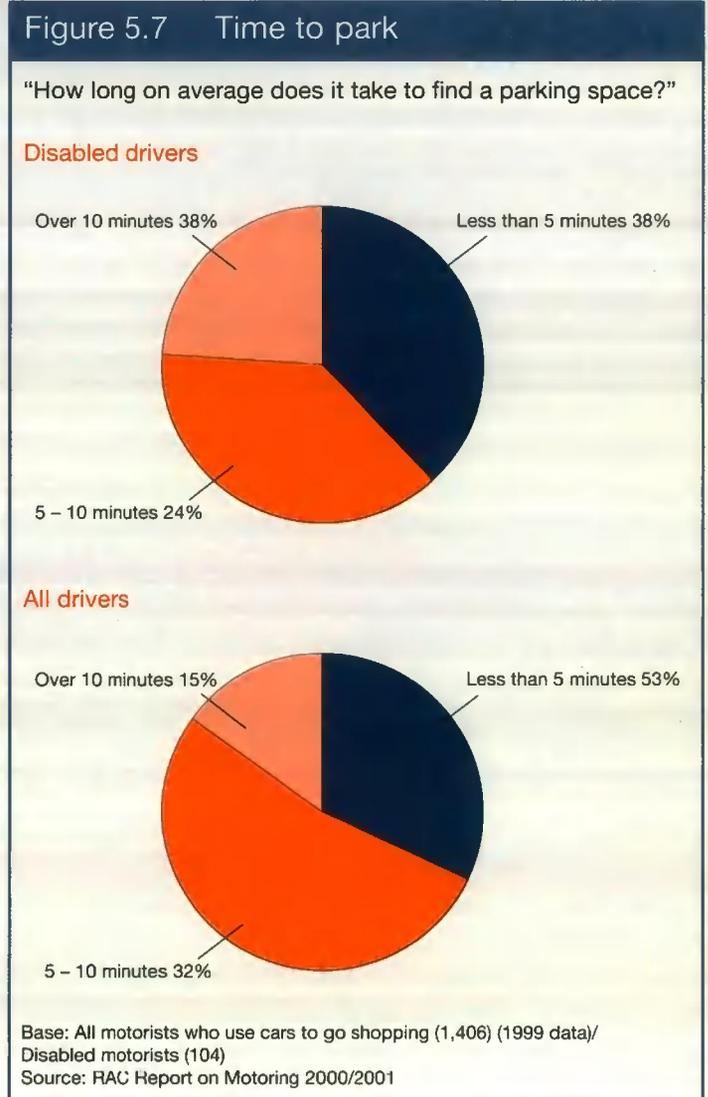
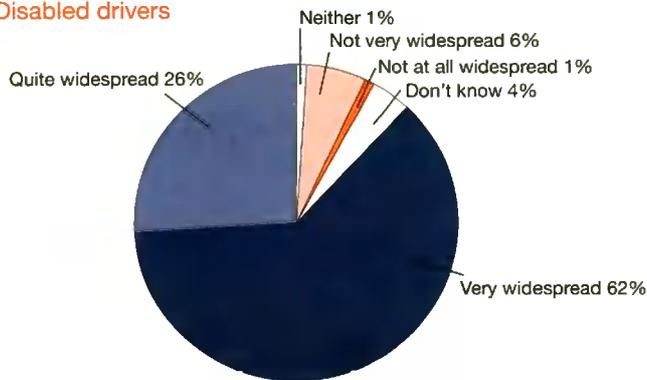


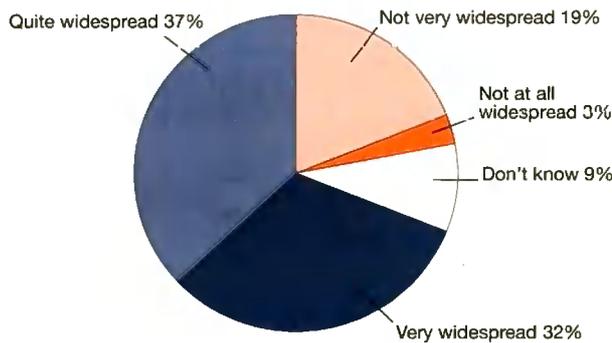
Figure 5.8 Misuse of orange badges

“How widespread do you think is the misuse of orange or blue badges, i.e. users who are not disabled using them to park in reserved parking spaces?”

Disabled drivers



All drivers



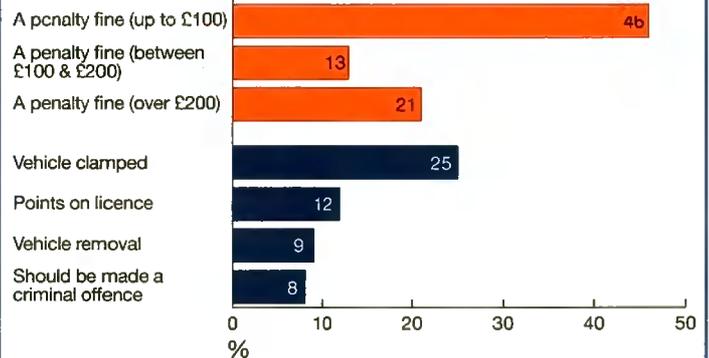
Base: All motorists (1,534) (1989 data)/Disabled motorists (104)
Source: RAC Report on Motoring 2001/Lex Report on Motoring 1990

88% of disabled drivers feel strongly that there is misuse of orange badges. This was originally asked of all drivers in 1989 when only 69% of them agreed. In the 1995 Lex Report on Motoring 12% of all drivers admitted that they would use a borrowed disabled badge to go shopping where they knew that parking spaces were in short supply, while 7% said they would park in a disabled parking bay if it were the only space left.

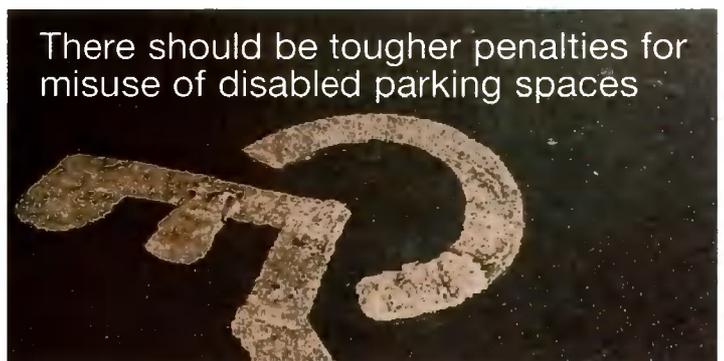
Disabled drivers have strong views on penalties for misuse of disabled parking spaces, 80% suggesting fines, in some cases more than £1,000, and even proposing that the offending drivers should have points on their licences.

Figure 5.9 Penalties for misuse of disabled parking spaces

“What do you think the penalty should be for misuse of disabled parking spaces?”



Base: Disabled motorists (104)
Source: RAC Report on Motoring 2001

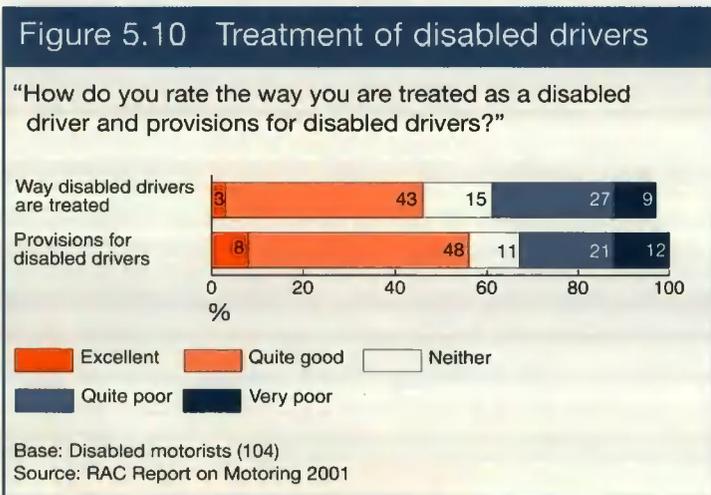


There should be tougher penalties for misuse of disabled parking spaces

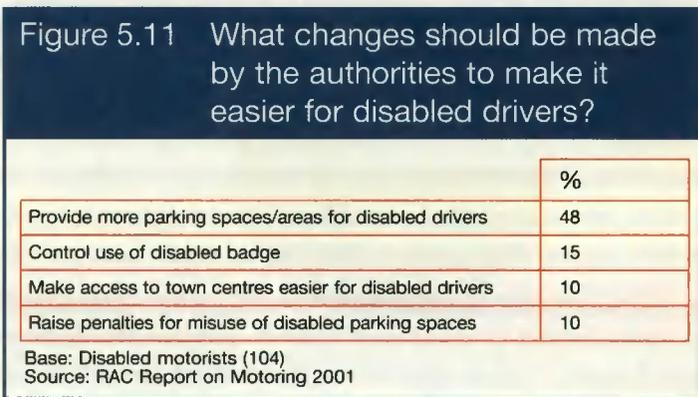
5.6

What should be done to improve conditions for disabled drivers?

Disabled drivers are fairly satisfied with the way they are treated, with 46% rating the treatment excellent or quite good while 36% think it is poor. The ratings are similar in the case of provisions for disabled drivers – 56% think they are good and 33% think they are poor.



The improvements disabled drivers would like include easier parking, more spaces, better control and more understanding traffic wardens.



Other suggestions included: providing free parking for disabled drivers, lowered kerbs, improved signage to make disabled parking areas clearer, making spaces wider, making traffic wardens more approachable/aware, cheaper fuel, car parks exclusively for disabled people and more toilets for disabled people.



5.7

How can breakdown organisations help disabled drivers?

Every disabled driver in the sample is a member of a breakdown organisation, compared with 68% of all drivers. Because of RAC's close relationship with Motability, it has a very high share of this sector of the market.

Disabled drivers would like to see breakdown organisations providing them with a priority service and a direct means of communication from their car. 43% of disabled drivers currently use a mobile phone in their car, compared with 39% of all motorists. They would also like more advice on the products and facilities available for disabled people.

Figure 5.12 Are there any special services which an organisation like RAC or the AA should provide for disabled drivers?

	%
Priority rescue and recovery service	39
Dedicated mobile phone/emergency button in car	16
Advice on new products for disabled drivers	15
Information on hotels with facilities for disabled people	14
Information on facilities for disabled people at service stations	13
Cheap finance	11
Help in getting car adapted	6

Base: Disabled motorists (104)
Source: RAC Report on Motoring 2001

RAC comment

The sense of freedom that drivers with disabilities derive from their cars must be protected at all costs to maintain their independence and quality of life. The intention to exempt them nationally from congestion charging is therefore to be warmly welcomed. Their conscientious approach to weekly safety checks is an example to all motorists. Their call for higher penalties to address the misuse of disabled parking spaces is worthy of further consideration, particularly in the light of plans for congestion charging and a reduction in city centre parking spaces, which will result in increased pressure on the remaining spaces.

While improved facilities for disabled drivers on public transport will not have a great impact on getting disabled drivers to switch from their cars, it is important that buses and trains, bus stops, stations and interchange locations are continually upgraded with disabled people in mind because of the large number of them who remain without the convenience of the car.



Disabled drivers would like a priority rescue and recovery service



Section



This section uses the on-line survey of regular internet users (Internet regulars) to compare their attitudes with all motorists. See page 81 for details of the sample.

six

The internet



Who are internet regulars?

How do we use the internet for our motoring needs?

Do we follow up a search for information with action?

How easy do we find the internet to use?

How much do we use mail/phone/the internet for buying at home and how is this likely to change?

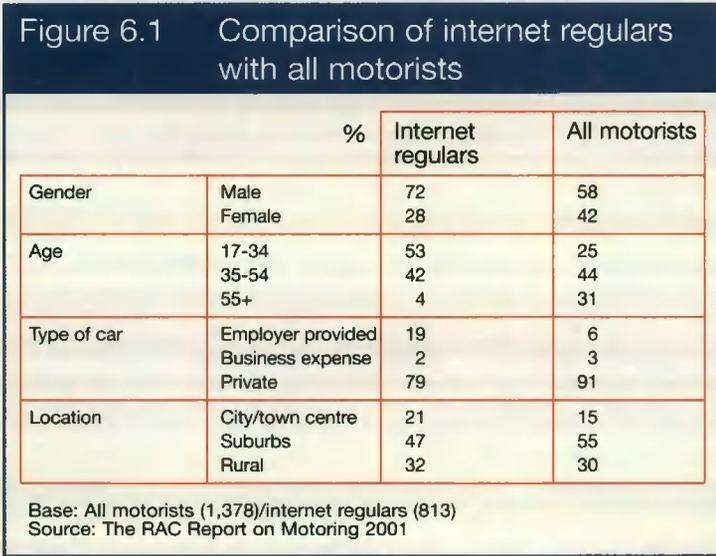
How do we react to the impact of extra delivery vans?

How do internet regulars view the future?

6.1

Who are "internet regulars"?

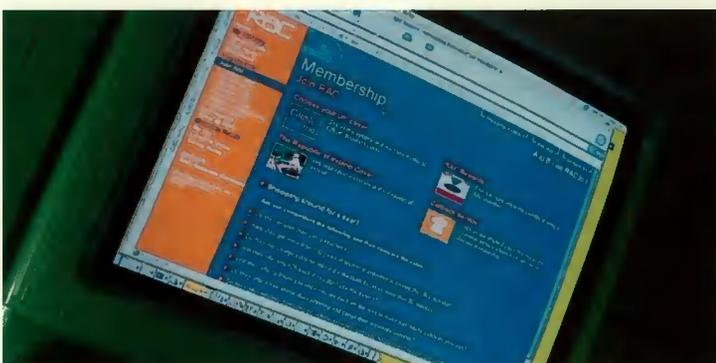
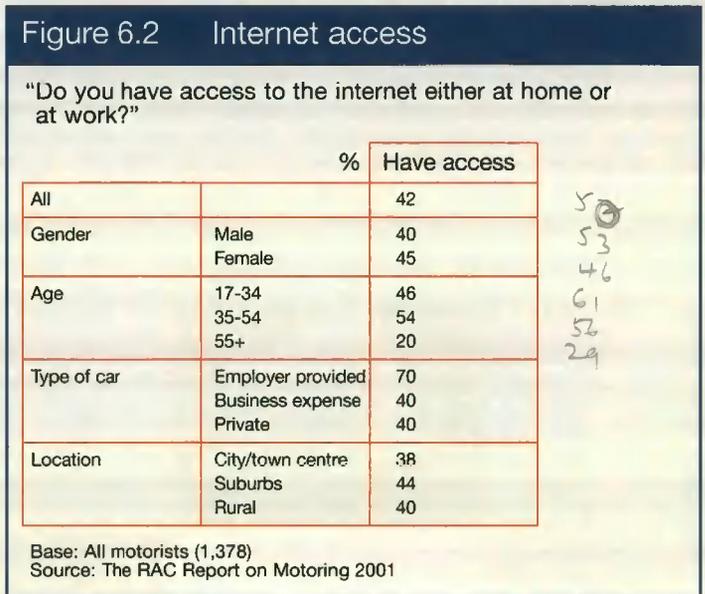
In this section, responses from the main motorists panel are compared with a group of "internet regulars", frequent users of the internet who completed an on-line survey on the RAC website. The sample is thus self-selecting and represents those who are already keen users of the internet and who are familiar with the RAC website. Not all respondents answered every question so the base varies.



6.2

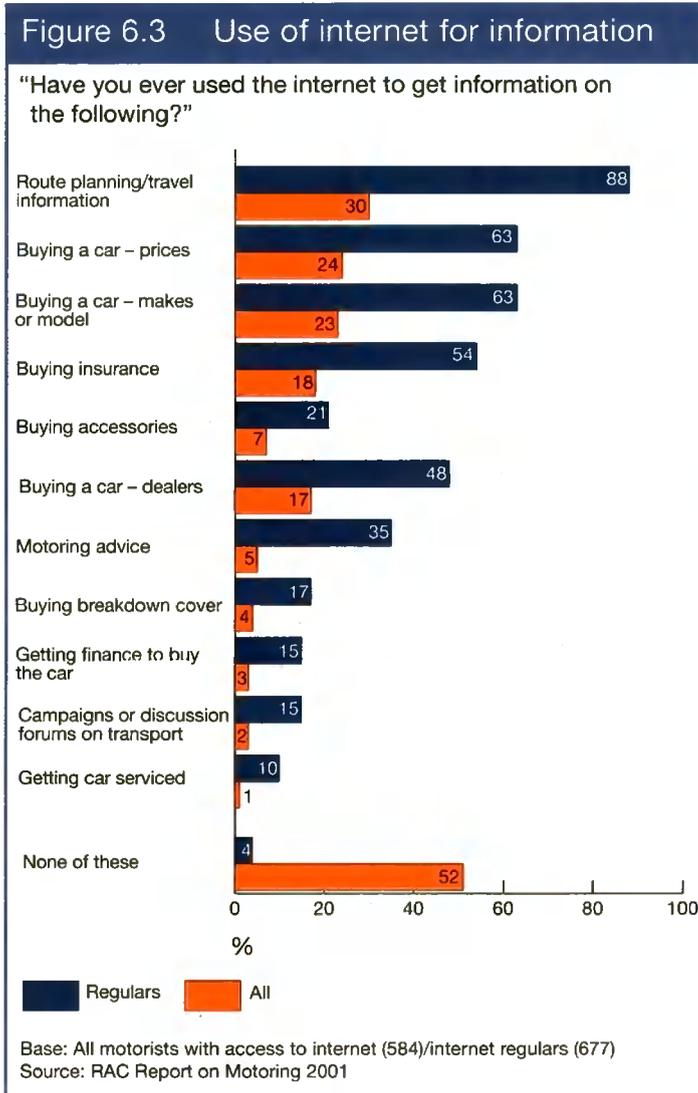
How do we use the internet for our motoring needs?

Less than half of all regular drivers (42%) have access to the internet either at home (27%), at work (6%) or both (9%).



Internet access is increasing rapidly

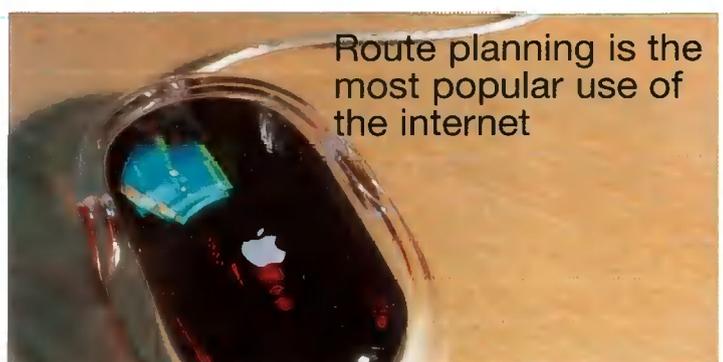
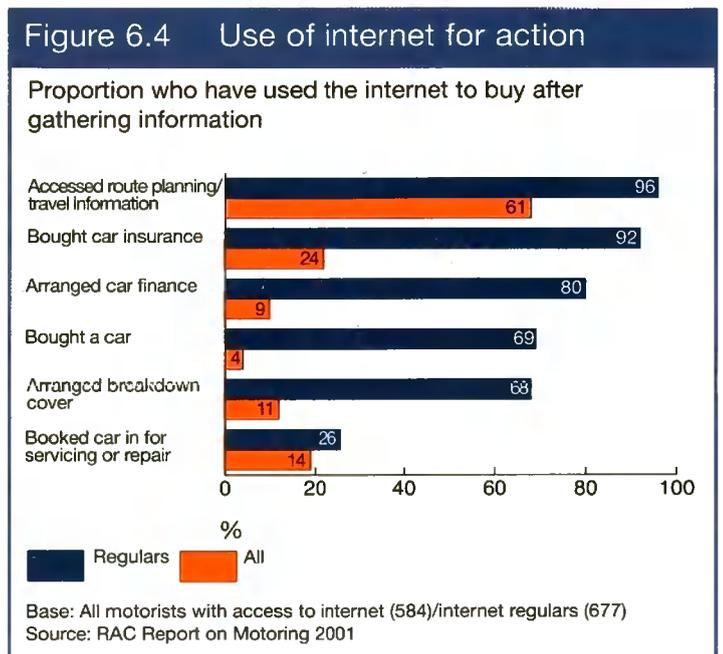
The most popular use of the internet for motoring is for route planning which is used by 88% of regulars and 30% of all motorists. Two thirds (63%) of internet regulars have used the internet for getting information on car prices and models and half for enquiring about insurance (54%) and getting details of dealers (48%), compared with less than a quarter for other motorists with internet access.



6.3

Do we follow up a search for information with action? How easy do we find the internet to use?

Enquiry is not always followed up by action. Both regulars (96%) and other motorists (63%) were very likely to use the internet to purchase route planning information once they had made the original enquiry. Regulars were also likely to follow up other aspects, with over two thirds buying breakdown services, cars or finance after their original enquiry. Other motorists were much more cautious, with only a fifth buying insurance or breakdown cover, 9% arranging finance and 4% actually buying a car. When it came to arranging service for their car, only a quarter of either group appeared to trust the internet to confirm a booking after making the original enquiry.



Despite using the internet more frequently, internet regulars seem slightly less satisfied with ease of access and ability to use motoring websites than other motoring users. This may be because they are using more sites and trying to exploit more features that are not so easy to use. Overall satisfaction rates are high for both groups of users.

6.4 How much do we use mail/phone/the internet for buying at home and how is this likely to change?

A little under half (44%) of all motorists shop from home. Of those 76% have used only mail order or phone, 5% use only the internet and 19% use both. Internet regulars, however, are well used to buying remotely, with 89% saying that they do and most being happy to use both the internet and more conventional mail order and phone. In the RAC Report on Motoring 2000, mail order was not included but the proportion buying by telephone and the internet was 36% for all motorists and 88% for internet users

Because of its convenience, rural motorists are more likely to buy from home (51%) than city dwellers (38%). Similarly, 63% of disabled drivers buy from home by mail order or telephone and 12% through the internet.

Figure 6.5 Accessing and using the internet

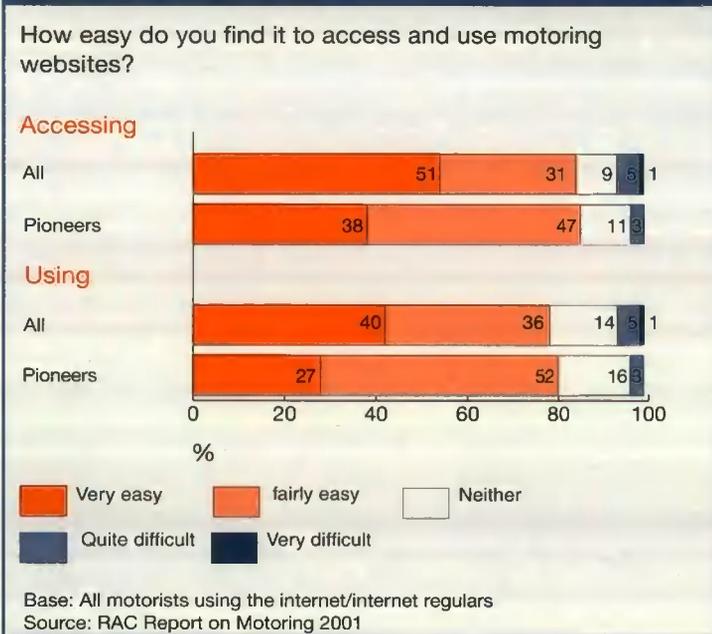
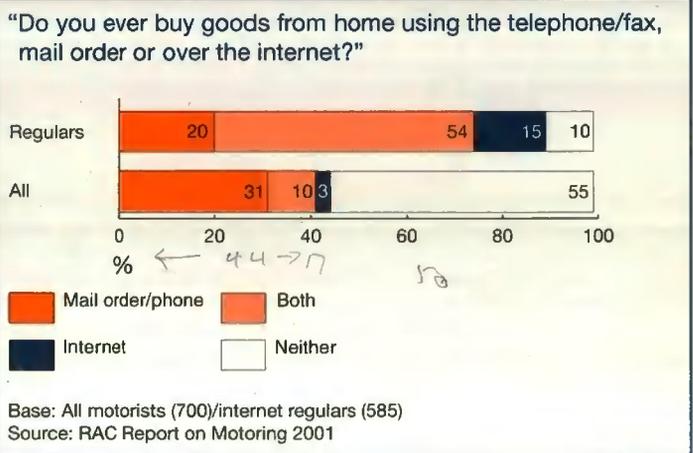
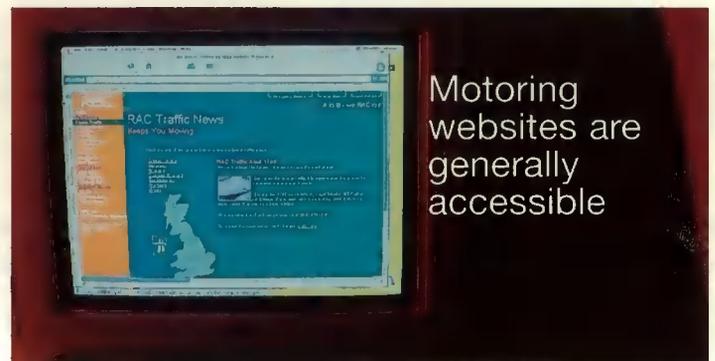


Figure 6.6 Buying goods by mail order, phone or internet



RAC comment

The internet is a powerful tool for providing large amounts of information rapidly and in a timely way, provided that it is kept up to date. Motorists appear to be keen to use it for information rather than on-line buying and are prepared to access a number of sites to obtain the information they require. It can also be a valuable source of motoring information. The RAC and DETR websites, for example, already contain tips on environmentally sensitive driving.



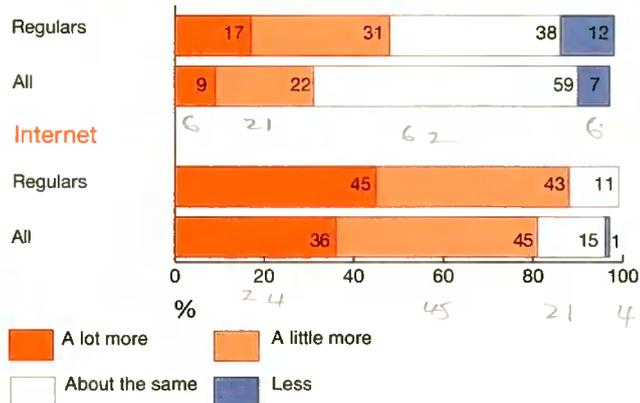
Motoring websites are generally accessible

Motorists in general and internet regulars seem keen to use home shopping more, with 31% of all motorists and 48% of regulars who have shopped from home saying they would use it more. More than 80% of both groups expect their use of the internet for home shopping to increase. Rural drivers are more positive about both forms of shopping.

Figure 6.7 Future use of home shopping

"In future, do you think you will buy more or less goods via phone/fax/mail order or over the internet?"

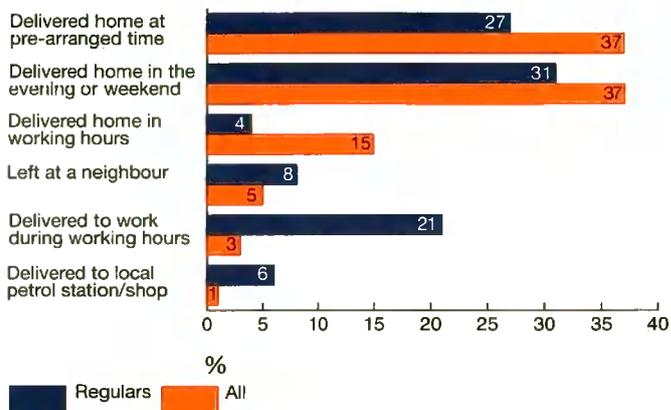
Telephone/fax/mail order



Base: All motorists who shop from home (312)/internet regulars who shop from home (524)
Source: RAC Report on Motoring 2001

Figure 6.8 Preferred method of delivery

"Which of the following options would be best for you if you ordered goods from home?"



Base: All motorists who have bought from home (312)/internet regulars who have bought from home (546)
Source: RAC Report on Motoring 2001

The delivery service for goods ordered both over the phone/mail order and the internet is generally good with nearly 90% delivered on time. Delivery service for internet regulars is slightly poorer because they are ordering more and are less likely to be at home as a higher proportion are working. Only a third of on-line users are at home when goods are delivered, compared with some 60% of all motorists. One in six internet regulars has their goods delivered to the office or elsewhere to avoid the problem of not being at home.

The preferred delivery method depends very much on whether the respondent is working or not. As more internet regulars are at work, they prefer to have their goods delivered to their home at weekends or at a pre-arranged time, or delivered to the workplace. They can also see the advantages of delivery to a neighbour who takes goods in for others in the street or to a local petrol station or shop where they can be collected at their convenience. Other motorists are happy to have their goods delivered at home during the day.

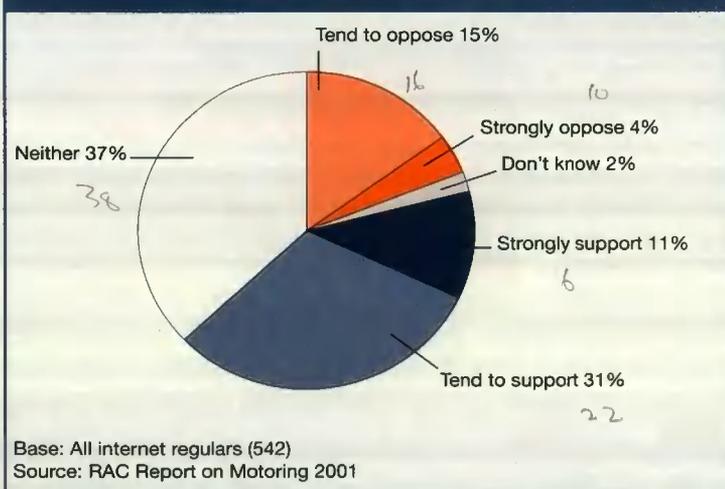


The growth in home shopping depends on the convenience of delivery

6.5

How do we react to the impact of extra delivery vans?

Figure 6.9 Support for home shopping if it led to increased vans and lorries in residential streets



There is general support amongst internet regulars for the growth in home shopping even if it means an increase in the number of vans and lorries delivering in residential streets outside working hours.

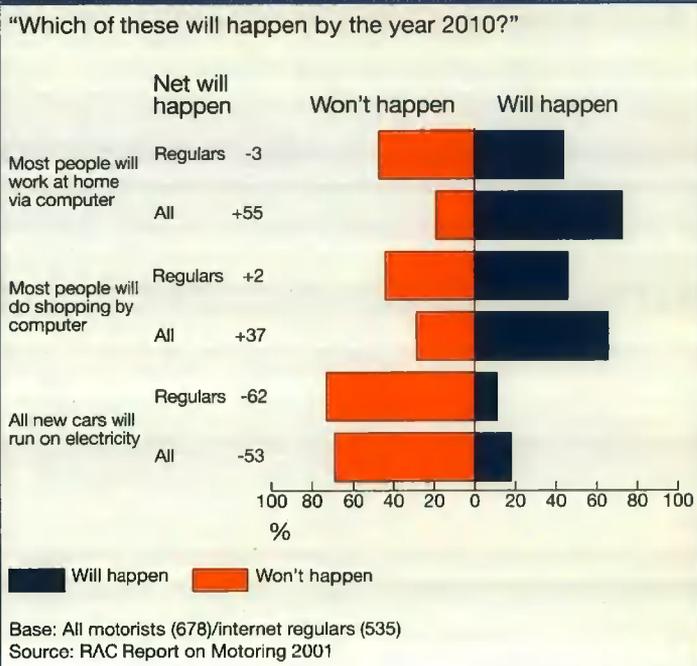
Net support (those who support minus those who do not) is +22%, a slight increase since last year when net support was +12%. All motorists' views were slightly less supportive.

6.6

How do internet regulars view the future?

Internet regulars were also asked about their views on what would happen by 2010. For technical projections about cars running on electricity or having route guidance systems, their views matched those of the general motoring public. However, regulars were much more doubtful about increases in home shopping and home working and felt they were less likely to happen. This may be because they are already heavier users of these facilities and, starting from a higher base of familiarity, anticipate a smaller change in the future.

Figure 6.10 What will happen by 2010?



Extra delivery vehicles appear to be an acceptable cost of home shopping

RAC comment

Home shopping has many advantages in terms of convenience, particularly for those who live in rural areas where getting to shops is harder. Physical delivery does bring difficulties in that it is not always convenient to deliver during working hours. Delivery companies have to be more flexible with alternatives such as delivery to the office or in the evenings or at weekends. Many people want a specific delivery time, which requires the delivery companies to have more advanced systems to plan their routes. However, there are more creative solutions such as using local shops or petrol stations, which have long opening hours, allowing goods to be collected at convenient times. If the problems can be overcome, then home shopping will continue to grow. The situation with regard to extra delivery vehicles in residential streets at unsocial hours is less clear – although there is net support for the idea, there is a considerable proportion of motorists who are undecided whether it is an advantage or a disadvantage. This will need monitoring in the future.

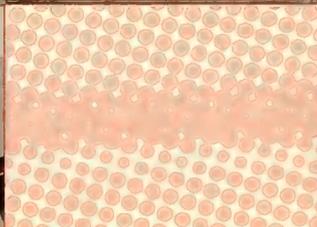


Section



seven

Buying our cars



How often do we buy new or used cars and where do we buy them?

What are our concerns about buying used cars?

Do we get warranties?

Do we get used cars inspected?

How do we fund our cars?

How familiar are we with the proposed change in vehicle excise duty (VED or road tax)? Will it affect our car buying and our choice of fuel?

7.1

How often do we buy new or used cars and where do we buy them?

Just under half (47%) of all regular motorists had bought a new or used car in the past two years, which is consistent with the average ownership of 4.7 years shown in Figure 4.7. Of these, 34% were bought new and 66% used. Most people bought one new (19%) or one used car (46%) while 13% bought one new and one used car.

The total number of used cars sold annually is 6 million (averaged over the past two years). The source of purchase by age of car when bought is shown in Figure 7.1. Because of the small numbers, the figures should be used with caution.

Figure 7.1 Source of purchase of used cars

Annual average over past two years		Age of car when bought (years)				
Where bought	Millions of cars	0-3	4-6	7-9	10+	All
Used car dealer	1.3	0.4	0.6	0.5	0.1	1.6
Friend or relative	0.8	0.1	0.2	0.4	0.4	1.2
Private deal	1.2	0.2	0.1	0.5	0.4	1.1
Franchise dealer for your make	0.8	0.8	0.3	0.1		1.1
Other franchise dealer	0.5	0.3	0.2	0.1		0.6
Auction	0.2	0.1	0.1	0.1	0.1	0.3
Used car superstore/trade centre	0.2	0.1				0.1
Total		1.9	1.4	1.7	1.0	6.0

Base: All who bought used car in past two years (488)
Source: RAC Report on Motoring 2001

1.3

7.2

What are our concerns about buying used cars? Do we get warranties?

Buying a used car can be a stressful experience. Used car buyers mentioned a wide range of concerns relating to the physical condition of the car and the purchase process.

Figure 7.2 Concerns when buying a used car

	%
Has it been involved in an accident?	19
Is the mileage correct?	18
Is it reliable?	17
Is it worth the price I am paying?	13
Its appearance/body work?	11
Is it safe?	8
Will I get any redress if there are any problems?	6
Does it have a service history?	5
Is there outstanding finance on the car?	5
Other concerns	13

Base: All who bought used car in past two years (488)
Source: RAC Report on Motoring 2001

Buyers of cars aged 2-5 years were particularly concerned about mileage, possibly because this is a typical age for company cars to come onto the market and there maybe a suspicion of the mileometer having been "clocked" to reduce high mileages. As the car becomes older, reliability becomes a greater concern, as does the condition of the bodywork. When drivers buy from friends they appear to trust the mileage but are more concerned about reliability and bodywork, reflecting the older age of such cars. When a car is bought from a used car dealer, there is often concern about the availability of a service history.



6 million used cars are sold each year

Figure 7.3 What sort of warranty did the used car have?

	%	Age of car when bought (years)					All
		<6mths	Up to 3	4-6	7-9	10+	
Dealer's own warranty	19*	59	64	59	10	55	
Manufacturer's branded used car scheme	52	13	8			13	
Remainder of manufacturer's new/original warranty	26	13	1		10	8	
Warranty from RAC or independent company		6	3	20		8	
Other		2	4			3	
None	4	7	20	22	80	16	

*this will be the manufacturers warranty.
 Base: All who bought used car in past two years from a dealer (263)
 Source: RAC Report on Motoring 2001

Figure 7.4 What sort of warranty did the used car have?

	%	Bought at franchised dealer	Bought at used car dealer
Dealer's own warranty	46	61	
Manufacturer's branded used car scheme	24	2	
Remainder of manufacturer's new/original warranty	13	2	
Warranty from RAC or independent company	5	8	
Other	2	3	
None	10	23	

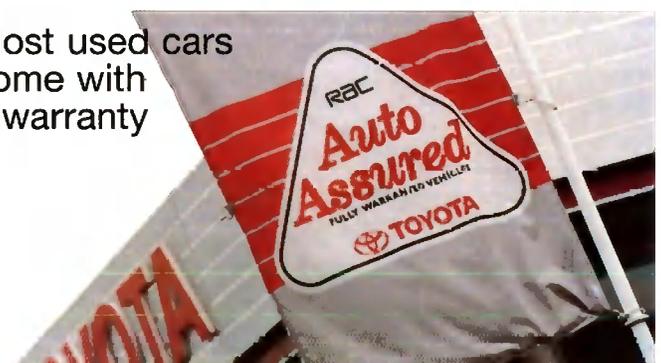
Base: All who bought used car in past two years from a dealer (263)
 Source: RAC Report on Motoring 2001

Younger cars normally come with the remainder of the manufacturer's warranty or their branded product. As cars get older they are increasingly covered by the dealer's own warranty, which will normally be a package supplied by one of the specialist used car warranty companies such as RAC. One in five cars aged 4 to 10 years has no warranty (0.3 million cars), a proportion which rises to 80% of cars more than 10 years old (0.8 million cars).

19% of those who bought a used car from a dealer took out an extended warranty (over 6 months).



Most used cars come with a warranty

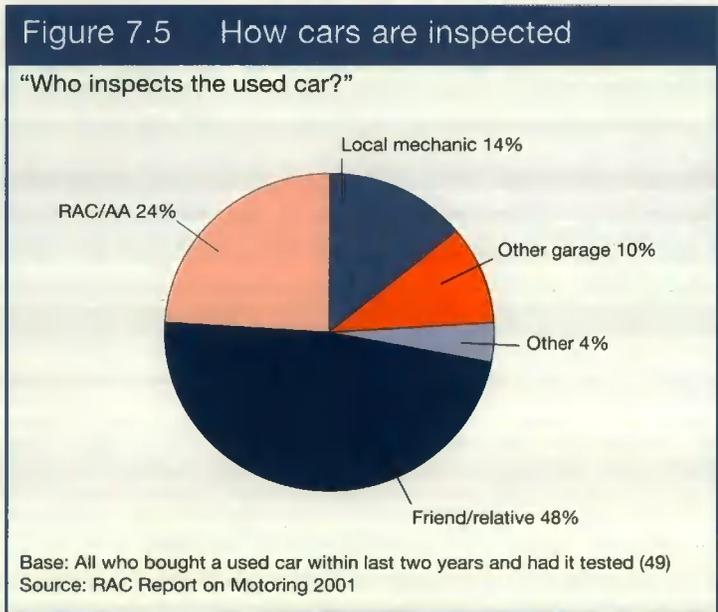


7.3

Do we get used cars inspected?

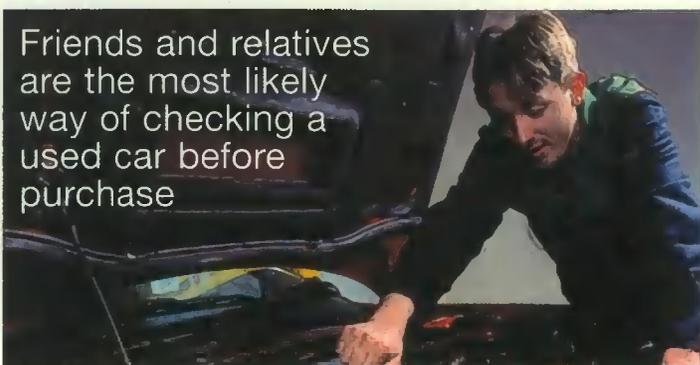
Only 10% of buyers purchasing a used car have it independently inspected or tested – 15% when the car is bought privately and 7% when the car is bought from a dealer. 4% of buyers of cars up to 4 years old and 12% of buyers of older cars obtain an independent test.

Drivers are most likely to get their car checked by a friend or relative (48%) especially if they buy their car privately or buy an older car. After they have had the car inspected, 80% go on to buy the car and the remainder used the opportunity to renegotiate the price or have remedial work done.



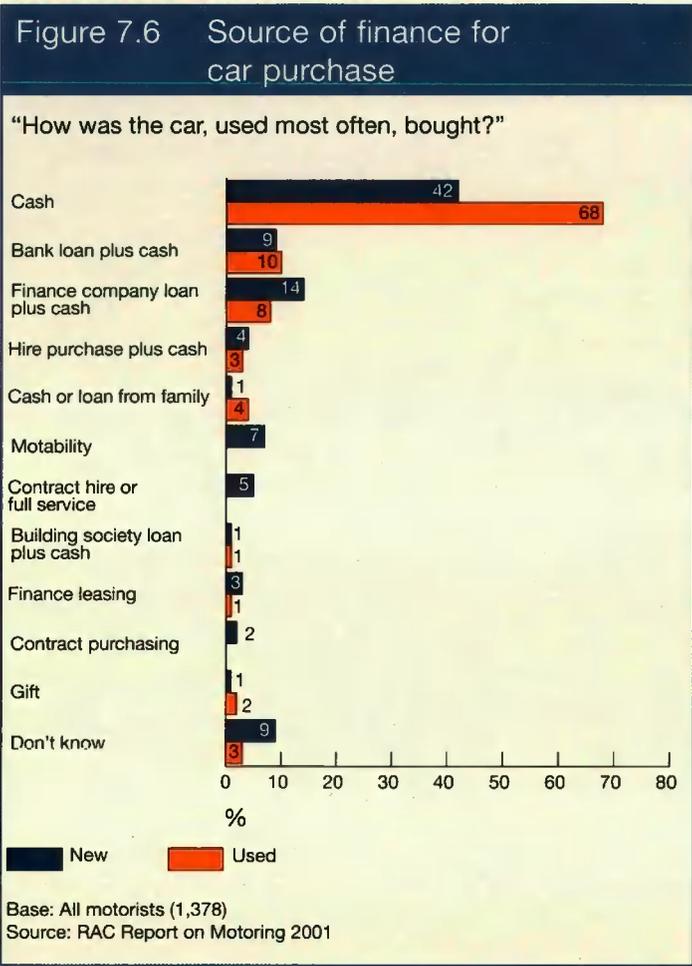
RAC comment

We are all very dependent on our cars and we try to change them regularly to ensure that we have a safe and reliable form of transport. Buying a new or used car is part of this process and we need to make sure that we make the right decision. Used cars, with their greater variability in mileage, history and condition are a potential source of problems and therefore we have to use as many means as possible to ensure that the car meets our requirements. Buying from a reputable source, having a good warranty and inspecting the car professionally for any defects can eliminate much of the uncertainty.



7.4

How do we fund our cars?



Cash remains the most likely way to pay for a car with over half of buyers choosing this method, a trend which has been steadily increasing. More than two thirds of used cars are financed this way.

For cars costing up to £3,000, 85% of buyers pay outright by cash. Cash is also a major source of funding when purchasing cars costing between £3,000 and £20,000, although this is more likely to be backed by a loan. Companies are the main purchasers of cars over £20,000 and the proportion of cars bought on contract hire rises to 14%. Overall for employer provided company cars, the proportion bought by contract hire is 17% but, not unexpectedly, a third of company drivers do not know the source of financing by their company. Other research shows that around 40% of company cars are funded by contract hire.



7.5

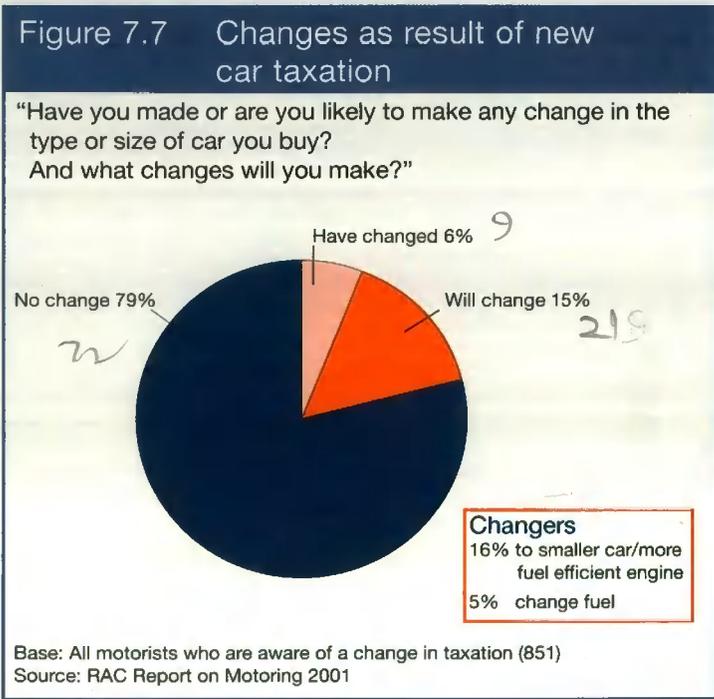
How familiar are we with the proposed change in vehicle excise duty (VED or road tax)? Will it affect our car buying and our choice of fuel?

81
19
92
45

Three fifths (62%) of motorists are aware of changes to car taxation, with most of those (87%) mentioning a lower rate for smaller cars, and a further 9% mentioning a rate based on CO₂ emissions for new cars. Although younger drivers were generally less aware of a change, they were more likely to mention a lower rate for smaller cars, reflecting the type of car they tend to drive. Some drivers also commented on the VED rate having risen. The changes announced in the November 2000 pre-Budget statement to extend the discounted VED rate for cars between 1200 and 1500cc are a further encouragement to drivers to switch to smaller cars.

The changes to VED are beginning to have an effect on drivers' purchasing behaviour – 6% have changed and a further 15% are considering a change, mainly to smaller or more fuel efficient cars. A small number have switched or are planning to switch fuel, either to gas or to or from diesel. However, the low awareness of the move to base tax on CO₂ emissions means the proposed change has probably not yet had any significant impact on drivers' behaviour

Only 5% of drivers had considered buying a car which runs on alternative fuel when they were making their last car purchase.



82 27
9 3



RAC comment

It is very encouraging to see that drivers are beginning to respond to the fiscal encouragement to drive more fuel efficient cars, a demand which is being met by the considerable improvements made by car manufacturers under pressure from European emission targets. However, much more publicity is required to overcome the low awareness of the proposed change to environmentally based VED. We welcome more information from car manufacturers combined with further changes in taxation to encourage the switch.



Section



eight

Looking after our cars



Can we do simple checks ourselves and how often do we do them?

Who is responsible for servicing? Why do we get our cars serviced?

Where do we go and how satisfied are we with servicing?

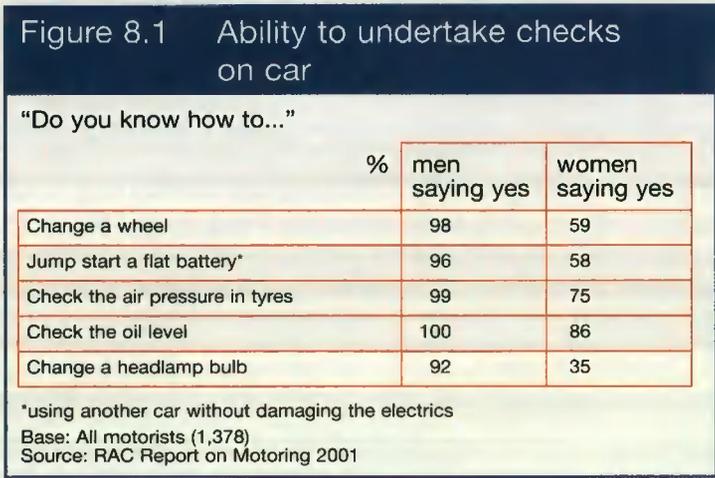
Do we insist on manufacturers' parts?

Do we feel that cars should be checked for emissions?

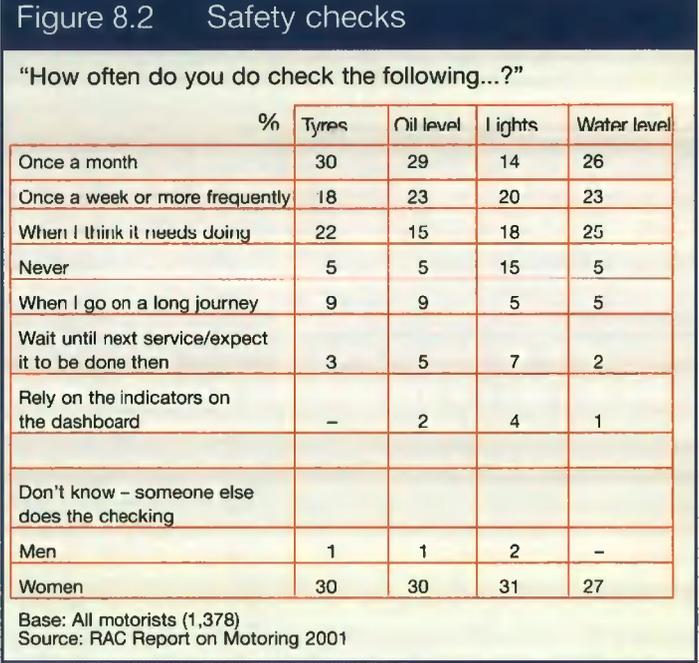
If so, where and how much would we be prepared to pay?

8.1

Can we do simple checks ourselves and how often do we do them?



Men claim to be able to do virtually all the simple tasks which may be required in everyday motoring while women are less confident, especially in jump starting a car or changing a headlamp bulb. The results are almost identical to those found in 1989 when this question was last asked in the Lex Report on Motoring.



Drivers are not very conscientious in checking their cars – most manufacturers recommend that these simple checks should be done weekly or at least each time the car is re-fuelled, but only one in five drivers follows this recommendation. A similar number make the checks when they feel they are necessary, while one in twenty drivers never checks their tyres, oil or water. More worryingly, one in six drivers, equivalent to over 4 million, never checks their lights. Disabled drivers, with their greater dependency on their cars, are more conscientious and are more likely to check those items every week rather than merely when they think it needs doing.

In line with their declared lack of knowledge about simple checks, women tend to leave them for someone else to do. They are much more likely than men never to do the work at all or only to do it when they feel it is necessary.



RAC comment

With the rising number of women drivers (now 41% of all drivers and projected to rise to nearer 50% in the next 10 years), it is important that they have the confidence to do simple checks on their car to protect their vehicles against unexpected breakdown.

8.2

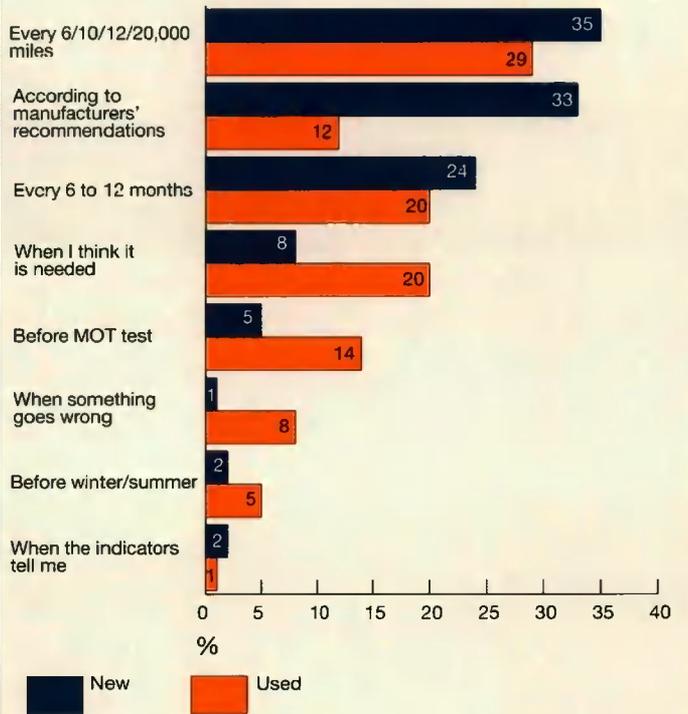
Who is responsible for servicing? Why do we get our cars serviced?

96% of men and 57% of women are responsible for the servicing of the car they drive most often. 26% of companies are responsible for servicing the cars they provide to their employees.

For 92% of owners of new cars, the timing of the service is determined by schedules: time, mileage or by the manufacturer. Used car owners are more pragmatic, relying to a greater extent on their feeling that something is needed (20%), the MOT test is due (14%) or waiting till something is going wrong (8%).

Figure 8.3 Timing of servicing

“What determines when you normally get your car serviced?”



Base: All motorists with responsibility for servicing (1,095)
Source: RAC Report on Motoring 2001



Most motorists follow regular schedules for servicing

Reflecting motorists' high dependence on their cars, the main reason for servicing is to maintain the car's reliability, ensuring that it always works first time and does not break down. This reason becomes more important as the car gets older. Safety is important for one in four drivers, whatever the age of the car. Drivers of newer cars are more concerned about maintaining the value of their car, conforming to manufacturers' recommendations and maintaining their warranty cover. Passing the MOT test is increasingly important as the car gets older.

8.3

Where do we go and how satisfied are we with servicing?

As cars have become more complex and subject to greater legislation on safety and pollution, there is a steady trend towards using a dealer, whether franchised or not, at the expense of relying on a friend or acquaintance or do it yourself.

Figure 8.4 Why car is serviced

"What are the main practical reasons why you service your car?"	%	Age of car when bought (years)				
		0-3	4-6	7-9	10+	All
Maintain reliability	57	61	68	68	64	
Improve safety/reduce chance of accidents	26	31	26	27	27	
Maintain value of car	28	25	22	13	22	
Ensure car passes MOT	4	15	21	22	16	
For peace of mind	15	16	19	15	16	
Manufacturers say so	22	9	5	1	8	
Improve fuel efficiency	7	5	8	6	7	
Warranty requirement	17	5	1		5	
Reduce pollution	3	1	1	1	2	

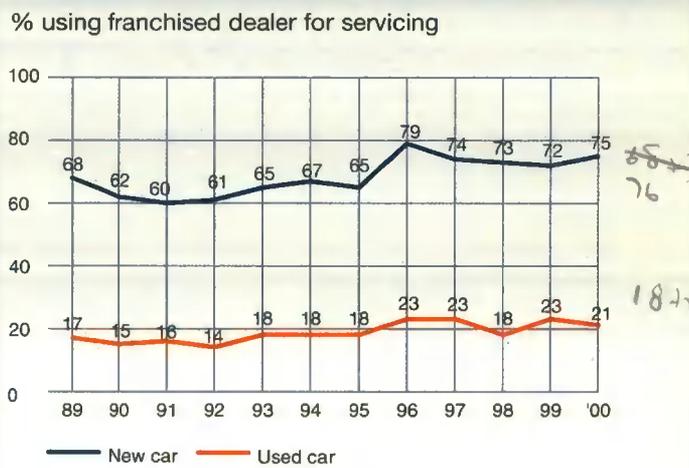
Base: All motorists who have their car serviced (1,286)
Source: RAC Report on Motoring 2001

Figure 8.5 Service location

	%	1988	2000
Serviced by main dealer		31	36 ³⁵
Serviced by garage/workshop		29	33 ³⁴
Friend/acquaintance		15	11 ¹⁴
Do it yourself		23	12 ¹¹
Service centre		1	2 ⁴
Mobile service unit		1	3 ³
Main dealer for different make		3	2 ³

Base: All motorists responsible for servicing (1,095) ¹⁰³ ⁹⁹
Source: RAC Report on Motoring 2001

Figure 8.6 Use of franchised dealer for servicing



Base: All motorists responsible for servicing
Source: Lex/RAC Report on Motoring



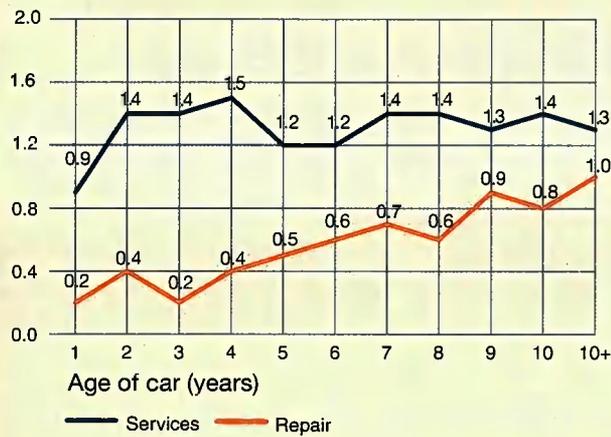
More drivers rely on a dealer or garage for servicing

The average number of services and repairs appears to be falling – this year it is 1.26 services (compared with 1.35 last year) and 0.67 repairs (compared with 0.69). This reflects improved reliability and manufacturers' longer servicing schedules.

The annual number of services rises in the first three years when the car does relatively high mileages, then falls in the 4 to 6 year age group as the car's second owner tends to do less mileage. It then rises again for older cars where the benefits of longer service intervals have not yet worked their way through and the car becomes less reliable.

Figure 8.7 Frequency of servicing and repair

Annual number of services or repairs by age of car



Base: All motorists who have car serviced (1,286)
Source: RAC Report on Motoring 2001

Satisfaction with servicing remains high, with a slightly higher net satisfaction among motorists who use a non-franchised workshop compared with those using a franchised dealer.

Figure 8.8 Satisfaction with servicing



*Net satisfaction: % satisfied less % dissatisfied

Base: All motorists responsible for servicing who use dealer/garage
Source: Lex/RAC Report on Motoring



Figure 8.9 The reasons for dissatisfaction

“Why were you dissatisfied with your last service?”

	%	Serviced at main dealer	Serviced at garage
Work was not carried out satisfactorily		47	82
Too expensive/poor value for money		45	15
Unnecessary work was carried out on the car		14	7

Base: All motorists who were dissatisfied with servicing at dealer or garage (45)
Source: RAC Report on Motoring 2001

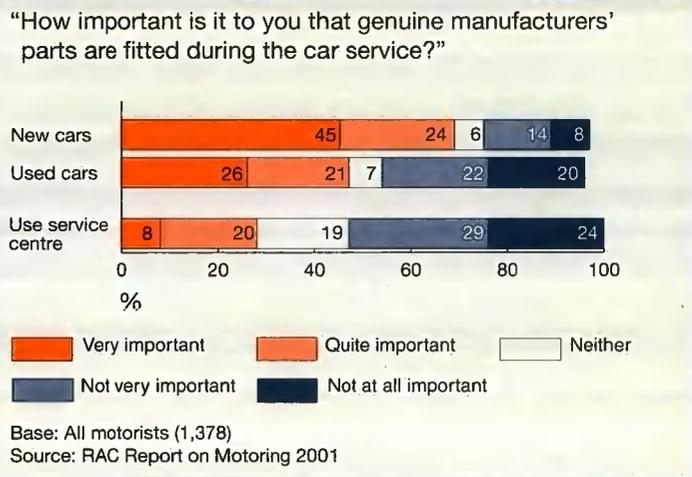
Quality of work remains the predominant reason for dissatisfaction, with price being an issue at franchise dealerships. (Note though that the number of dissatisfied respondents is small.)

8.4

Do we insist on manufacturers' parts?

One issue that has been raised particularly in connection with servicing outside the franchised dealer network is the use, or not, of manufacturers' parts. Drivers of new cars are quite concerned, with two thirds (69%) saying it is important to fit manufacturers' parts. Only half (47%) of used car drivers and a quarter (28%) of drivers who use service centres share that concern.

Figure 8.10 Use of manufacturers' parts



Motorists tend to prefer genuine manufacturers' parts

8.5

Do we feel that cars should be checked for emissions? If so, where and how much would we be prepared to pay?

Drivers of all ages and types of cars agreed that cars should be checked regularly for harmful emissions from exhausts, with 85% agreeing and only 7% disagreeing. The tests should preferably be done at a garage. A third of drivers (34%) think the test should be free and slightly more (37%) are prepared to pay up to £10.

Figure 8.11 Checking for emissions

"Where do you think these checks should be done?"

	%
Garage	77
Special emission centre	11
MOT test centre	4
At the roadside	3
At a petrol station	2
By the police	2

Base: All motorists who think cars should be tested (1,174)
Source: RAC Report on Motoring 2001

Figure 8.12 Paying for checks

"How much would you be prepared to pay for an emissions check?"

	%
Nothing	34
Up to £5	8
£5	15
£10	14
Over £10	9
Don't know	17

Base: All motorists who think cars should be tested (1,174)
Source: RAC Report on Motoring 2001



85% agree that cars should be checked regularly for emissions

Section



nine

Driver and car profiles



Profile of Britain's car drivers

Profile of new car buyers

Profile of used car buyers

Profile of company car drivers

Profile of Britain's cars

Driver profile by region

9.1

Profile of Britain's car drivers

Figure 9.1 Profile of Britain's car drivers

	%	Car drivers	General public
Sex	Male	58 <i>58</i>	48
	Female	42 <i>42</i>	52
Age	17-34	25 <i>30</i>	32
	35-54	44 <i>46</i>	35
	55+	31 <i>24</i>	33
Class	AB	22 <i>22</i>	23
	C1	32 <i>35</i>	27
	C2	24 <i>26</i>	22
	DE	22 <i>18</i>	29

Base: All car drivers (1,378)
Source: RAC Report on Motoring 2001

9.2

Profile of new car buyers

Figure 9.2 Profile of new car buyers

	%	1988	2000
Sex	Male	69	64 <i>56</i>
	Female	31	36 <i>44</i>
Age	17-34	19	22 <i>27</i>
	35-54	40	49 <i>48</i>
	55+	41	29 <i>25</i>

Base: All who recently bought new cars (255) *268*
Source: Lex/RAC Report on Motoring

9.3

Profile of used car buyers

Figure 9.3 Profile of used car buyers

	%	1988	2000
Sex	Male	67	66 <i>61</i>
	Female	33	34 <i>39</i>
Age	17-34	46	32 <i>38</i>
	35-54	36	48 <i>46</i>
	55+	19	20 <i>18</i>

Base: All who recently bought used cars (488) *398*
Source: Lex/RAC Report on Motoring

9.4

Profile of company car drivers

Figure 9.4 Profile of company car drivers

	%	1988	2000
Sex	Male	80	58
	Female	20	42
Age	17-34	27	25 <i>25</i>
	35-54	58	60 <i>62</i>
	55+	14	15 <i>13</i>

Base: All who drive company cars (276)
Source: Lex/RAC Report on Motoring

Company car drivers are more likely to be men than women – 58% of company car drivers are male. This has changed significantly over the past decade – in 1988 just 20% of company car drivers were women.

The company car is increasingly a tool of work rather than just part of a remuneration package. In 1993 15% of company cars were “perk” cars. This has fallen to just 3% in this year’s survey. 79% of company car drivers describe their car as an “essential part of my job”.

Figure 9.5 The importance of company cars in the workplace

	%	1993	1994	1995	1996	1997	1998	1999	2000
Essential part of job		69	71	73	77	77	82	80	79
Helpful part of job		12	10	13	12	13	10	11	12
Part of remuneration package		15	8	7	11	9	3	7	3
No opinion		4	11	4	0	0	5	2	6

77
12
7
4

Base: All who drive company cars
Source: Lex/RAC Report on Motoring

9.5

Profile of Britain's cars – new versus used

Figure 9.6 Profile of Britain's cars

	%	All cars	Still owned from new	Bought used
New versus used	Still owned from new	26	100	0
	Bought used	74	0	100
Type of ownership	Bought privately	91	78	96
	Provided by an employer	6	18	1
	Business expense	3	5	2
Age of car	0-3 years	20	56	9
	3-6 years	23	28	22
	More than 6 years	56	16	69

Base: All motorists (1,378)
Source: RAC Report on Motoring 2001

Figure 9.7 Profile of Britain's cars – private versus company

	%	Private cars	Company cars		
			All company cars	Provided by employer	Business expense
New versus used	Still owned from new	22	66	76	45
	Bought used	78	32	24	54
Type of ownership	Bought privately	100	0	0	0
	Provided by an employer	0	68	100	0
	Business expense	0	32	0	100
Age of car	0-3 years	16	62	71	45
	3-6 years	24	25	19	20
	More than 6 years	60	13	10	35

Base: All motorists (1,378)
Source: RAC Report on Motoring 2001

9.6

Driver profile by region

It should be noted that the sample sizes for each of the regions are relatively small and therefore the differences highlighted below may not be significant or representative of all drivers in the region.

London and the Southeast account for nearly a third of all the 27 million motorists in the UK. The next biggest motoring region is the north of England with 6.8 million motorists. Scotland accounts for 2.3 million motorists.

While the characteristics of the regions are broadly similar, there are a few interesting differences which may be statistically significant.

- Motorists in Scotland cover more miles than the British average each year.
- A higher proportion of cars are owned from new in the North. The lowest proportion is in the Midlands and East Anglia.
- There are more multi-car households in London and the Southeast of England, in spite of lower ownership in London itself.
- There are no regional differences in the proportion of female drivers.

Figure 9.8 Driver profile by region

	All	London & Southeast	Southwest & Wales	Midlands & East Anglia	North of England	Scotland
Number of drivers (m)	27.0 28	8.1 24	3.5 4.1	6.2 58	6.8 6.6	2.3 2.4
Total annual mileage	10,000 103	9,700 9.9	9,900 103	9,600 10.2	9,900 11	11,100 10.3
% of drivers where car was bought from new	26 26	26 28	27 26	17 26	33 25	23 32
% of regular drivers in households with more than one car	43 43	52 51	33 40	45 44	39 38	42 36
% of drivers who are female	42 42	42 43	42 41	43 47	42 41	42 38
% of drivers who are under 25 years old	7 8	8 9	5 9	7 8	5 6	10 5
% of drivers who are over 65 years old	16 10	18 11	22 12	11 8	17 8	11 14

Base: All motorists (1,378)
Source: RAC Report on Motoring 2001

Figure 9.9 Data for Figure 4.6 Grossed up estimates of numbers of cars in Britain at time of surveys and expectations in two years' time

	Households in GB	Households with cars	Avg. cars per household	Grossed up no. of cars	Expectation in two years' time		
					Year of expectation	Cars per household	Grossed up no. of cars
	m	%		m			m
1988	21.5	66.0	1.47	21.0	1990	1.59	23.3
1989	21.7	66.0	1.53	22.6	1991	1.67	25.1
1990	21.9	67.0	1.55	23.2	1992	1.63	24.9
1991	22.1	68.0	1.51	23.0	1993	1.59	24.8
1992	22.5	67.8	1.52	23.0	1994	1.55	24.5
1993	22.7	68.6	1.50	24.0	1995	1.60	25.8
1994	22.9	69.0	1.50	24.0	1996	1.57	26.4
1995	23.1	69.7	1.50	24.3	1997	1.59	27.0
1996	24.1	69.7	1.51	25.4	1998	1.60	28.1
1997	24.3	69.8	1.51	25.6	1999	1.60	28.4
1998	24.5	71.8	1.51	26.6	2000	1.54	27.6
1999	24.7	72.0	1.53	27.2	2001	1.57	28.4
2000	24.9e	72.0e	1.57	28.1	2002	1.62	29.5
2001	25.1e	72.0e					
2002	25.3e	72.0e					

Base: All motorists
Source: Lex/RAC Report on Motoring/DETR/FES

Appendix

Basis of research and statistical reliability

The RAC Report on Motoring 2001 presents the analysis of two quantitative surveys conducted by Sample Surveys Limited on behalf of RAC Motoring Services.

For the main drivers' survey, Sample Surveys interviewed 1,378 drivers (defined as driving at least once a month) face to face at home between 11 September 2000 and 14 October 2000 in 100 constituency points in Great Britain. The sample included a boosted sample of 200 company car drivers.

The data have been weighted to reflect the actual GB incidence of a) company car drivers (responsible for their own company car), b) those who drive someone else's company car and c) drivers who bought their car privately. Interlocking weighting factors have also been applied to reflect gender and residential region of GB car drivers. Some questions were only asked of part of the sample. The base for those questions is therefore lower than 1,378.

The "Disabled Motorists" sample involved face to face in home interviews with 104 disabled drivers between 9 October and 21 October, based largely on registered Motability scheme users (90) but also including 14 members of the Disabled Drivers' Association (DDA).

Sample Surveys' subsidiary, Relevant Knowledge, also administered a separate survey of users of the RAC website. Visitors to the site were invited by pop up menu to answer a range of questions based on the main survey, with a "cookie" being used to ensure they did not participate more than once. 813 responses were recorded giving an overall response rate of 20%. Not all respondents answered every question so the base is sometimes lower than this.

It should be noted that the cited source of this year's research is "RAC Report on Motoring 2001". Up until 1999, the research is cited as "Lex Report on Motoring" and for 2000 as "RAC Report on Motoring 2000". Consistent research methods were used throughout.

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown give an estimate, within a small margin of error, of the actual figures.

The error margin varies with the sample size; the larger the sample is, the lower the error will be. It also varies with the actual proportion answering, so that the error is lower for a

90/10 result than it is for a 50/50 result. In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with different sample sizes from the car drivers' survey.

Sample size	Percentage error	
	90/10 result	50/50 result
1,378	+/- 2	+/- 3
1,000	+/- 2	+/- 3
800	+/- 2	+/- 3
600	+/- 2	+/- 4
400	+/- 3	+/- 5
200	+/- 4	+/- 7
100	+/- 5	+/- 10

For example, from a sample of 1,378, if 50% answered in a particular way, we would be 95% confident that the true range is between 47% and 53%.

Sources and acknowledgments

Motor Industry of Great Britain 2000 World Automotive Statistics

Society of Motor Manufacturers and Traders

Transport Statistics Great Britain 2000

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Lex Report on Motoring 1989-1999

Lex Service PLC, London

Lex Vehicle Leasing Report on Company Motoring 1995-2000

Lex Vehicle Leasing, Marlow

Family Expenditure Survey 1999/2000

Office of National Statistics

RAC Report on Car Dependency November 1995

RAC Motoring Services, Feltham

SURVIVE Report April 2000

Institute of Civil Engineers, London

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Buying a new car													
Choosing a car	46	90			89					83	66		
Commitment to manufacturer				89		72		5					
Cost of car					73	72	98	98	67	84	68	67	
Dealers visited	57	86		96	84	74							
Deciding where to buy a car/new formats	52		96	86	93	74			66		67		
Distance travelled to buy					94								
Extra car expectations			42			37							40
Features in current/next car		106			90	104	54	44			71		34
Financing the car	57	92	94	98	80	70	131	91	62	79		66	65
Fixed prices/bargaining/discounts				92			100						
Improvements by manufacturer							66						
Information sources, trust of	89						72						
Mileometers, accuracy		86											
Nearly-new cars		85						68					
New & used car buyers, profiles			90	80		65	96	111			74	71	78
Next car purchase new/used	84	104		82	57	56							
Numbers buying a car	42	81		81	69	63	92	110	64	81			
Part exchange				100	74								
Personal service when buying a car	55						85						
Reasons for buying car now	44	82			72		72						
Registration letter										71			
Satisfaction with sales experience		88				86		70	68	85	69		
Service and parts with car sales				88	95								
Shopping for a car	48				86	78		70			15		
Source of purchase of car	50	83	92	84	76	66	59	94	64	81	67	66	62
Test drives	57	80		96	85								
Timescale for purchase process					83								
Treatment of women	18	94									54		
Type of car bought/choice							97	51					
Used car money back/exchange		102	90										
Virtual reality, buying by							102		56				
Warranties and inspections													63
Car ownership													
Britain's cars	7	40	28	29	30	130	126	118	82	98	75	74	78
Car as office/creche													12
Car bought new/used	42	81	90	80	68	63	94	110	64	95		74	79
Car ownership expectations	38	42	36	38	32	52	33	82	54	73	61	60	38
Car replacement or additional	42			82									
Drivers in household					40								
Effect of economic climate			40	46	50		79				61		
Increase/decrease in car ownership				42	36	54	80			19			
Length of car ownership			34	36	42	58	47	85	56	75	62	69	39
Lifestyle and car ownership						49							
Likes and dislikes of car ownership								35					
Miles driven	9	32	30	30	44	60	23	19	85	100	16		15
Miles driven (work)		32		32	44	62	24	32	86	101			
Name for car													12
Ownership by households	80	9	12	12	14	120	116	78	58	73	60	61	38
Scrappage	89	10	14	14	16	122	118	87	58	76			
Disabled drivers													
Adapting cars													45
Characteristics, reliance													44
Parking, use of "orange" badges		58											48
Treatment, services provided													50

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Drivers & the motoring environment													
Britain's drivers	3	18	22	22	22	126	15	24	78	94	74	72	78
Catalytic converters		52		66									
Commuting				34	48				86	14	19		
Congestion, delays due to	70		52	54						34		13	
Congestion, problem/easing		70	84	56			26	38		44			14
Cost of owning car/driving/public transport		36						40				12	
Diesel cars					98	110	29	106	70	87			
"Difficult to adjust lifestyle"	16	34		48	62	34	20	17	50	12	12	10	10
"Don't care what I drive"	16			48	65		127		15				11
Electric cars							31						
Environment, who responsible for						83							
Environmental star rating												40	
Free parking				48					87				
"Green" travel plans													17
Home shopping and congestion												46	58
Items in car/car telephones				78	58								
Learner drivers						112							
Privatisation of railways			66		21								
Traffic reports/information		72											30
Reliance for different journeys								20		34		10	11
Route planning													30
Satisfaction with roads	34									30			35
School run							65			36	46	13	16
Shopping										35	38	13	
Time taken to find parking space												13	
Threats to environment	20							62				36	
Use of car	12		48	65			22						
Use of unleaded petrol	26	51	88	66	56	108	32	108					
Women drivers					42								
Would use car less if public transport better	16	34	68	72	66	34	20	58	50	13	32	11	13
Driving													
Accidents and causes									26			21	
Annoying behaviour							39	44					
Best drivers - men or women	18								26			18	
Cyclists, provision for		77											
Driving fast							19	46	16				
Driving when tired									24				21
In-car behaviour									24				20
Motorways		74				102							
Pleasure and problems of driving			50				17	37		15	12		
Points on licence												21	
Road signs		76	60		120							19	35
Road rage/anger/stress			56					42	18			26	
Standard of driving	20							47	12			18	
Europe													
Buying cars in Europe/grey imports			100									68	
Car ownership	81	11	17	17	18	124	120	89	51				
Channel Tunnel use	40	108	124	124	61	117							
Continental trips					60	116							28
Internet													
Internet - home shopping												46	56
Internet - seeking information												44	54

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Law breaking and traffic control													
Attitude to MOT		59			114				46			38	
Attitude towards breaking speed limits									16				
Consumer protection					96								
Drinking and driving		62				28	41		20			31	
Driving misdemeanours		56					39						
Driving offences			62		124				14				
Drugs and driving									20			31	
Jumping red lights	64						41						
Law breaking and traffic control		62		126									
Protests against new roads								57					
Speed cameras		63			115	135	42		40			23	
Speed limiters			64		116								
Traffic wardens/clamping	32												
New car sales													
Registrations UK and Europe	76	11	15	15	17	123	119	88	52	72			
Trends and forecasts						15	76	81	52	22			
UK market shares by manufacturer	12	16	16	19	125	121	90	59	77	78	63	63	
Non-drivers													
Profile of non-drivers, reliance on car								27					
Policy													
Car sharing			86										
Carrying driving licence												21	
Driving test – age passed				52									
Driving test changes		64						34				20	23
Environment/traffic congestion			74			21	26	38		28			
Fuel prices and tax												51	66
Importance of car industry		69			128								
Motorway tolls						23					39		
Parking taxes											33		
Park and ride				74	52								
Paying for public transport				72				60		49		52	
Petrol tax versus road fund licence		37		71						47	41		
Re-testing of drunk drivers												19	
Pollution versus congestion			76			128					24		
Road pricing			82							49		51	
Road tourist signs			67		118								
Support for transport policies			78	68			28	52		44		51	36
Traffic growth										18			
Transport telematics/technology				76						51			
White Paper – A New Deal for Transport											30		
Use/non-use of public transport			70				20	58			26	10	11
Safety													
Children and seat belts		66		60			70	1					
Dogs in cars		67											
Driving under pressure													22
Effectiveness of safety campaigns				62					32				
Factors contributing to road safety		60					43		37				
Motorway safety													24
Safety features on car		22				27	55	66	44				

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Security													
Car theft - car or radio	28				122	32							
Concerns about crime						32							
Experience of crime						140							
Night-time parking/garages	30		46	50									
Security features			44	64		33	54						
Servicing													
Checking service work			120										
Control of servicing		101											
Coping with minor problems	14												70
Deciding where to have car serviced		98	118				89	76	75	92			
Distance to travel for service	61				105								
Emission testing													75
Frequency of service and repair					106	96	108	104	72	90	70	69	73
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