

RAC

RAC Report on Motoring 2002

Going too fast,
going too slow?

David Herbling

At B-we RAC to it

14th Edition



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RAC Report on Motoring 2002

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- Section 2 Going too fast – accidents on the road
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- Section 4 Going too slow – reacting to congestion
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RAC Motoring Services

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 our customers throughout the whole of their motoring lifetimes.

For many of our customers our wide range of products and services begins with driving or rider tuition from RAC-owned BSM – the UK's driver training experts 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, one of our 1,320 uniformed patrols will deliver speedy assistance at the roadside.

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

RAC's Public Affairs team spearheads campaigns on behalf of RAC Motoring Services and develops advice and guidance on responsible motoring for our members. Its corporate social responsibility projects, including the highly successful Grass Routes programme which challenges UK schools to devise green travel plans for staff and students, complement the activities of the RAC Foundation for Motoring, a charitable organisation which champions the interests of motorists.

RAC Consumer Division

Since the 2001 RAC Report on Motoring, RAC's Consumer Division has grown significantly. As well as welcoming record levels of new RAC customers, the division has entered exciting new markets – from providing loans and personal contract plans (PCPs) for car purchases, to launching RAC 124, a caffeine-based drink developed as part of RAC's campaign to educate drivers to the dangers of driving while fatigued.

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RAC remains committed to the development of in-car information services. RTT – a joint venture between RAC and Trafficmaster – offers dynamic traffic and travel information for motorists whether they are planning a journey via the internet, or on the move and in need of the latest traffic news. Via its award winning website www.rac.co.uk, RAC provides on-line services including live traffic information, estimated journey times, hotel search and booking services, vehicle sales, finance and examination services and advice on many aspects of motoring.

As well as vehicle breakdown cover, RAC members also enjoy a comprehensive range of additional benefits and discounts on motoring and travel products.





RAC Business Services RAC Auto Windscreens

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 risk management services and driver training – aimed at reducing the number of fleet driver accidents, state-of-the-art journey management, business process outsourcing and accident management services.

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. Our commitment to developing and utilising the latest driver training technology is demonstrated by our unique computerised driving simulators, award-winning hazard perception computer programmes and computerised banks of driving theory test questions.

BSM have extended their expertise to offer motorcycle rider training, as well as tailored driver training in specially adapted cars for people with disabilities, and work with company vehicle drivers to refresh their driving skills and reduce their accident rates.

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.

RAC Auto Windscreens handles more than 750,000 automotive glazing jobs annually. As well as a fleet of 800 mobile units, with highly skilled fitters able to repair as well as replace windscreens for anything from a Mini to a mobile crane, RAC Auto Windscreens also has more than 160 repair and replacement centres. RAC Auto Windscreens has its head office in Chesterfield, Derbyshire where we also house our own manufacturing plant, unique to the industry. It produces 250,000 RAC-branded windscreens annually and is the most modern windscreen manufacturing facility in Europe.

Lex Service PLC

RAC Motoring Services is part of Lex Service PLC, a group which provides motoring and business solutions to individual and corporate customers in the UK and Europe. Lex Business Services include vehicle management, mechanical handling and inventory management and helping industrial and commercial customers operate more effectively by enabling them to outsource those 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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Foreword by Rt Hon John Spellar MP, Minister for Transport

I am delighted to be able to introduce this year's RAC Report, which is, as ever, a very useful indication of driver attitudes in this country. Our 10 Year Transport Plan made clear that we must recognise the car as an integral part of modern living. Too often in the past, government was seen – often unfairly – as being anti-car. I can reassure drivers that we most certainly are not.

Yes we need and want to improve public transport and alternative modes of transport, but we also want to make life easier for motorists by tackling congestion. Like many car drivers, I get sick and tired of being stuck in traffic jams – whether it is because of unnecessary and annoying street works that have run weeks behind schedule, or whether it is because we just do not have enough active traffic management (better information for drivers, clearing accidents quickly etc) to get our roads moving again.

The Government has already put in place the foundations for improving our transport system and the 10 Year Plan has set aside the resources to maintain the road network in optimum condition and to make the most effective use of the network. It also allows us to implement major investment in new schemes arising from multi-modal and other studies in line with regional transport plans. And we aim to do all this while minimising the impact on and, where possible, enhancing the environment.

Of course, it is very early days for the 10 Year Plan. Although it was published well over a year ago, the increased funding only began to kick in from April last year. So, in fact, we are just nine months into the first of the ten years that it covers. But I am encouraged that the combination of the Plan and the driver attitudes set out in this report will help us move towards the standard of transport system we all want.

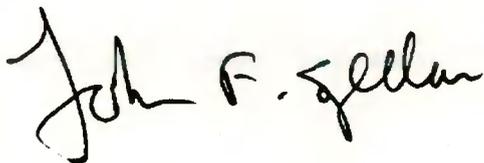
However, it would be foolish to believe that there are any instant solutions. Real changes in the quality of services and investments in major infrastructure projects inevitably take time to plan and deliver. We have to make good the results of under-investment in our transport infrastructure – which will take many years to turn around.

Traffic congestion is a problem for many of our towns, cities and motorways. It is clear from the views expressed in this report that it remains a serious issue and I note that it reflects the findings of our own Departmental research. Too many vehicles, roadworks and the school run are identified as the main causes of congestion. So for most people in this country – whether travelling by car, bus or on foot – it is improvements in road-based travel that will mean the most to them.

This report shows that road safety remains a high priority for motorists. We have set targets for a 40% reduction in the number of people killed or serious injured in road accidents; a 50% reduction in the number of children killed or seriously injured; and a 10% reduction in the slight casualty rate.

Tackling excessive speed is one of our highest safety priorities. We recognise that this will be a long haul but we are making progress and our continuing advertising campaign is making people aware of speed as an issue. Education, engineering and enforcement are the key to taking road safety issues forward successfully, and I am pleased to say that we are making progress on the enforcement of speeding. I recently launched the new yellow livery for speed cameras – a popular move as the results of this report indicate. Cameras are not to raise revenue; they are to modify behaviour to reduce accidents. Seeing the cameras will help them do that.

I hope that you enjoy reading this report as much as I have. It provides a very useful snapshot of motorists' views and concerns and therefore helps to inform us as to how effectively our policies are being delivered. I am heartened by this report: it gives a realistic flavour of the current transport conditions in the UK, but it also shows us that motorists are receptive to change. I hope that, increasingly, drivers will see that the Government is receptive to their views as well.



Rt Hon John Spellar MP,
Minister for Transport

Introduction by Andy Harrison, Chief Executive, Lex Service PLC

Welcome to the 2002 edition of the RAC Report on Motoring, the 14th year of this annual survey of motorists' attitudes. This year the primary focus is on the two areas that are highest on the motoring agenda: speed and congestion. In both areas we have found that there is a significant difference between drivers' perceptions of the issues and the reality. To help us understand these disparities we have included external research and commentary from Steve Stradling, Professor of Transport Psychology at Napier University, Edinburgh.

The issue of vehicle speed has attracted attention from the public, the media and government bodies over the last year. According to our research, speed has eclipsed drink driving as the main perceived cause of road accidents. This change is almost certainly due to the success of the campaign on drink driving. We urge the government to increase its efforts in raising drivers' awareness of the dangers of driving at inappropriate speeds. Even though two thirds of motorists who are "flashed" by cameras face no further consequences, speed cameras are perceived as a genuine deterrent to speeding. We support the campaign to ensure that they are prominently placed in known accident danger points.

While motorists see speed as the main cause of accidents, our research has shown that there is insufficient understanding of the underlying causes of accidents. We encourage the government to look at changing the way accident statistics are collected to provide greater focus on that issue.

Perhaps not unexpectedly, motorists perceive that accidents are the fault of other drivers and not themselves. More encouragingly, teenagers support measures such as restricting new drivers from driving powerful cars – a stance long adopted by our driver training experts BSM. The majority of motorists are strongly supportive of refresher training. We believe this should be high on the road safety agenda.

Company car drivers have higher accident rates than other drivers – even taking into account their increased mileage. Only a small percentage have had additional driver training and there are few that feel they need it. We welcome the contribution of the Work-related Road Safety Task Group in addressing this problem. It recognises that altering perceptions and corporate culture will require detailed analysis and sustained education campaigns, a task which RAC's own Risk Management team has already been tackling.

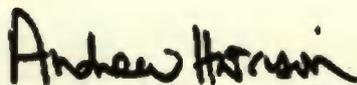
One fact remains constant – Britain is still a car-dependent society. Interestingly, we have also become a congestion-expectant and congestion-tolerant society as motorists now routinely allow for delays before they set off on a journey. The Report confirms that the potential for reducing car journeys does exist. Many motorists recognise that there is a significant number of short journeys which they could make on foot rather than by car. Yet in practice, motorists stay in their cars and put up with delays rather than walking or using public transport. We believe that government must further increase its focus on persuading drivers to give up those short car journeys where alternative transport is a realistic option.



So what conclusions can we draw from this year's Report and what action is needed? There is recognition that change is needed, though motorists prefer to rely on others to take the necessary steps. However, major campaigns by the government and other interest groups can have a significant impact, and education through campaigning and training are the key to changing motorists' attitudes and behaviours. Campaigns should look to narrow the gulf between perception and reality in reducing congestion and accidents and encouraging safe and more economical driving. RAC Motoring Services will work together with the DTLR, the Commission for Integrated Transport, the Motorists' Forum and RAC Foundation to ensure safer and more reliable motoring for motorists now and in the future.

My thanks to David Leibling who has written the report, to Sample Surveys who conducted the research, to Market Dynamics who have provided valuable editorial input and to Professor Stradling for his insight. I would also like to thank RAC Design who have designed and produced the report, Anne-Marie Hill of Lex Service and the RAC team – project managers Harry Mirpuri and Peter Brill, as well as Ann Skey – for their valuable contribution.

I trust you find the report informative and helpful.



Andy Harrison, Chief Executive,
Lex Service PLC

Section 1: Going too fast – the issue of speeding





- Most people speed but “I speed less than others”
- Existing speed limits are broadly satisfactory but drivers suggest a lower speed for motorways in bad weather
- Speed cameras cause people to slow down, particularly at the cameras
- Motorists want more cameras, painted yellow, especially at traffic lights, together with stricter enforcement and more publicity
- Drivers do not see cameras as an infringement of personal liberty

Section 1:

Going too fast – the issue of speeding

Introduction

When it comes to motoring the debate about speed is always an emotive one, and drivers' perceptions of what constitutes "safe" or "appropriate" speed are often tempered by the reality of mandatory speed limits or their involvement in a road accident.

In fact, government statistics show that speeding is a widely committed offence. In this report most drivers admit to speeding, although their perception is that their own speed is "less than others".

Convictions for speeding account for a third of all motoring offences excluding parking¹, yet this report also shows that many more drivers remain unconvicted even when "flashed" by a speed camera.

This section covers drivers' views on the right speed for different roads and their support for different methods of enforcement including speed cameras and penalties for speeding.

Key research findings

- 22% of drivers suggest that speed limits do not mean much on motorways and that drivers should judge for themselves. They believe that most (71%) drivers drive at speeds over the motorway limit anyway
- Existing speed limits are considered broadly satisfactory but 40% think the 70 mph limit for cars on motorways is too low. Motorists do favour a lower speed for motorways in bad weather (50-55 mph for cars) and a reduction to 50 mph on main roads in the countryside
- Older drivers are more likely to accept the speed limits, while younger drivers are more likely to say that it is safe to exceed them
- 78% of drivers consider speed cameras a good way of deterring people from speeding and they do not consider speed cameras as an infringement of their personal liberty
- Speed cameras cause people to slow down rapidly when approaching a camera, and this is considered a dangerous practice
- Motorists who are 'flashed' by a speed camera are more likely to have been prosecuted when compared with 5 years ago, but 69% have had nothing happen after being 'flashed'

"I don't tend to think 'right, I will speed' but obviously sometimes I do – I can't give a specific time or reason."

1.1 Speeding

Speeding is perceived as the main cause of accidents (figure 2.21) and yet most motorists still exceed the limits. Government statistics² show that over half of drivers exceed the speed limit whether on motorways and, in particular, dual carriageways or on residential roads. This is reinforced by motorists' assessments of the speeds at which most people drive – around 10% over the legal limit on motorways and in towns and closer to the limit for dual carriageways and main country roads. Drivers' estimates of their own speeds were also over the limits but typically 5 to 10% lower than the speeds of "most" drivers.

"It is difficult with modern cars to stick to the speed limit."

Motorists believe that the current speed limits are generally appropriate. However, for cars travelling on motorways in good weather, over 40% feel that the existing speed limit of 70 mph is too low.

Motorists do however suggest variable speed limits on motorways, typically suggesting a 25% lower speed for motorways in bad weather. This practice already exists in France where motorways have a lower speed when it is raining – 15% lower than the good weather speed of 130kph (80mph). Motorists also feel that the safe speed for vans and lorries is 5-10 mph below the current levels.

There is also a perception that a lower speed limit of 50mph might be appropriate for cars travelling on main country roads.

Figure 1.11
Actual driving speeds

"What speed do you think most people drive on these roads?"

"What speed do you normally drive on these roads?"

	Limit (mph)	Most drivers		Self		Actual [†]	
		Average (mph)	% driving over limit	Average (mph)	% driving over limit	Average (mph)	% driving over limit
Motorways	70	78	71	73	42	70	55
Dual carriageways	70	68	20	62	10	70	52
Main roads in countryside	60	54	16	48	6	45	9
Country lanes	60	43	2	39	5		
Main roads in towns	30/40	37	67	33	38	37*	36*
Residential roads	30	34	51	30	17	32	60

Base: All motorists/[†]Transport Statistics GB 2001/* Roads with 40mph
Source: RAC Report on Motoring 2002

"I speed when I am on an empty road."

"There's never enough time. With congestion, it's just frustration and trying to make up time."

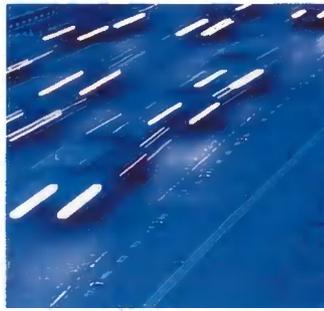


Figure 1.12
Safe driving speeds

“What do you believe is the safe speed for these vehicles on these roads?”

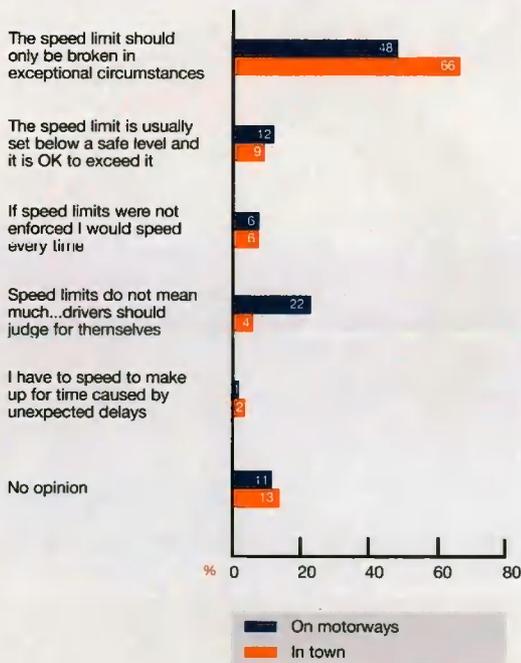
Mph	Cars		Vans		Trucks	
	Safe	Current legal limit	Safe	Current legal limit	Safe	Current legal limit
Main roads in countryside	50 ³⁴	60/70	46	50/60	42	40/50
Main roads in towns	33 ³⁰	30/40	32	30/40	30	30/40
Motorways in fine weather	74 ²⁷	70	68	70	59	60
Motorways in poor weather	53 ³⁸	70	48	70	43	60

Base: All motorists
Source: RAC Report on Motoring 2002

“I think in an area with a low speed limit of, say, 30 – if it is quiet and there is no-one around – you can go a little faster.”

Figure 1.13
Attitudes to keeping to speed limits

“Which of these best expresses your attitude to keeping to the speed limit?”



Base: All motorists
Source: RAC Report on Motoring 2002

Despite the evidence of both government statistics and personal experience, that many drivers exceed the speed limits, motorists generally feel that speed limits should only be broken in exceptional circumstances, particularly in towns. On motorways, they are more likely to agree that drivers should judge the correct speed themselves. Compared with 1996, drivers have become less willing to accept the legal limits in favour of judging for themselves.

Older drivers are more responsible, accepting the speed limits, while younger drivers are more likely to say that it is safe to exceed them. Those drivers who believe that the speed limit should only be broken in exceptional circumstances are more likely to say they keep to the speed limit themselves and to suggest that the existing speed limits should be maintained.

This is in contrast to those who think that speed limits are only a guide and who would be happier to see higher speed limits.

Attitudes are not influenced by the number of points drivers have on their licence, even though the points may have arisen from speeding.

“It’s easier and safer to drive faster on the motorway to keep up with the traffic.”



"I need my car for work so I don't speed."

1.2 Prevention

Speed cameras have been in use since 1991, so most drivers are familiar with them. In terms of their effectiveness, the perception is that cameras do work, and in reality much of this is through self-enforced speed reduction rather than as a result of actual prosecution.

In England and Wales there are 1.0 million speeding convictions each year (equivalent to more than one in 30 drivers a year) compared with 0.2 million dangerous, careless or drink driving offences and 1.8 million parking offences³.

Figure 1.21
Trends in recorded speeding offences



Source: Transport Statistics GB 2001
Speeding offences England and Wales only

The number of recorded speeding offences fell quite sharply when cameras were introduced, then rose, and are now falling again despite the increase in traffic.

Drivers' responses to speed cameras fall equally into three categories – motorists either drive more slowly generally, they slow down specifically for the cameras or they do not change their behaviour. This pattern has been broadly consistent since 1991. Those drivers who believe speed limits should not be exceeded tend to drive no differently when they see a speed camera, probably because they are already driving at the correct speed. Those who believe that it is safe to exceed the speed limits (figure 1.13) are more likely to slow down just for the cameras, which suggests that the cameras are effective but will only reduce accidents if they are placed at hotspots. Younger drivers and those who drive company cars also tend to slow down just for the cameras.

Figure 1.22
Effectiveness of speed cameras

"When you drive along a road with speed cameras, what do you tend to do?"



35% Slow down for speed cameras
34% Drive generally slower
31% Drive no differently

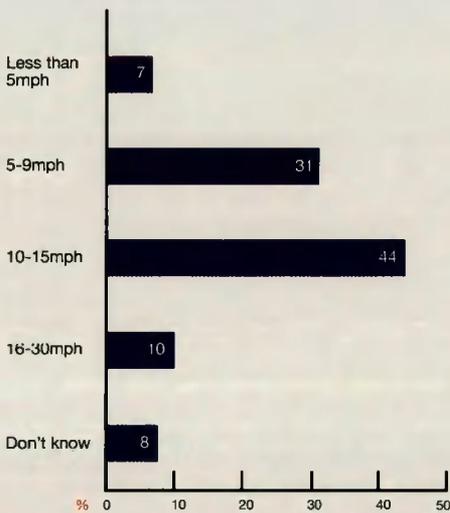
Base: All motorists
Source: RAC Report on Motoring 2002

"I don't speed because I always have children in the car."



Figure 1.23
Speeding past cameras

“When you passed a speed camera, how much in excess of the speed limit were you travelling?”

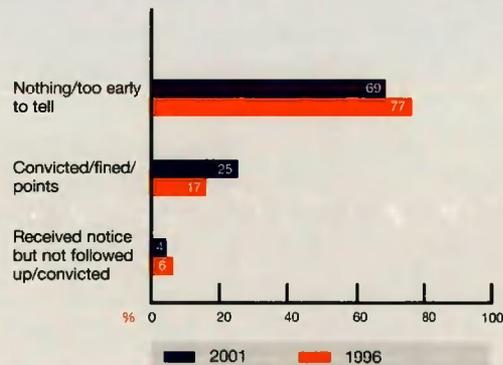


Base: All who have driven past a speed camera at over the speed limit
Source: RAC Report on Motoring 2002

Even though most cameras are preceded by warning signs, a third of motorists (36%) say they have at some time sped past a camera (only 24% in 1996) and more than half of those (54%) were exceeding the speed limit by 10mph or more. Half of drivers with points on their licence admit to speeding past a camera. Older people and city dwellers are more law abiding. Those who admit to speeding generally also admit to speeding past cameras, suggesting a less responsible attitude to speed. Those who say they “just slow down for the cameras” do not always do so in time and so are also more likely to have sped past a camera. Typically drivers exceed the limit by 10-15 mph when they are “flashed”, slightly slower than in 1996.

Figure 1.24
Results of being photographed by a speed camera

“What happened last time you were flashed by a speed camera?”



Base: All those who have been ‘flashed at’ by speed camera
Source: RAC Report on Motoring 2002

Of those who have been ‘flashed’ by a camera, more people are now being convicted – one in four now compared with one in six in 1996. However, there are still around two thirds who are ‘flashed’ but receive no follow up – 8% less than in 1996. This may give an indication of the proportion of cameras with no film or of police perceptions of the cameras’ “self-enforcing” effects. However, speeding at 10mph or more over the limit doubles the rate of conviction (43%), compared with 20% for those exceeding the limit by 10mph or less when going past a camera.

“(I speed) on B roads because I know those roads, they are more familiar.”

"Cameras are dangerous as they encourage people to slam on the brakes when they see one - I have nearly crashed like this."

Generally drivers are in favour of speed cameras and believe they are a good way of stopping speeding. They believe they should be painted bright colours, although many also feel that people slow down dangerously quickly at cameras. Those who slow down just for them (figure 1.23) acknowledge it is a dangerous practice (72% agree compared with 60% for all drivers) but perceive that painting cameras yellow or orange to make them more visible would be a welcome step - some even suggest other warnings.

"I think cameras are a good idea. If you see them you slow down because if you get caught you get fined."

Half of drivers (48%) think cameras are just a way of making money for the police or government, an especially strong perception among drivers who slow down just for the cameras (60%).

Most motorists do not consider cameras an infringement of personal liberty (only 16% agree, 67% disagree). There is strong support for more cameras to catch "red light jumpers" and nearly half of motorists know of a local site where they think a speed camera should be installed.

Drivers favour a hard hitting publicity campaign, more speed cameras, heavier penalties and 'on the spot' speeding fines as ways of encouraging people to keep to the speed limit. Measures which receive more limited support are speed limiters on all types of vehicles and stricter enforcement. Compared with 1999, motorists are slightly more supportive of soft measures such as a publicity campaign but less supportive of more cameras and of stricter penalties. Those who slow down just for the cameras are slightly less supportive of restrictive measures.

"I find the adverts on TV very effective - they really scare you to think about your speed."

Figure 1.25
Attitudes towards speed cameras and other restraints

	% Agreeing
Speed cameras are a good way of deterring people from speeding	78
There should be more cameras at traffic lights to catch those who jump red lights	76
Speed cameras cause people to slow down dangerously quickly	60
Speed cameras should be painted bright yellow or orange so that you can see them clearly	57
Speed bumps/sleeping policemen are a nuisance/waste of money	49
Speed cameras are just a way of raising revenue for the police/government	48
Speed cameras should only be located where there is an accident hotspot	45
I know somewhere locally where there should be a speed camera	45
Speed cameras are an infringement of personal liberty	16

Base: All motorists
Source: RAC Report on Motoring 2002

Drivers think that a fine of £100 (currently £60) is appropriate for just exceeding the limit. For excessive speeding, the suggested penalty ranges from fines of £100 to £1000 or even a one month ban. As expected, the penalties currently suggested for drink driving are more severe than for excessive speed with fines of up to £1000 and one year bans suggested.





Figure 1.26
Support for speed control measures

“Which of these measures to encourage drivers to keep to the speed limit would you support?”

Top 8 mentions	% Agreeing
A hard hitting anti-speed publicity campaign (similar to that for drink driving)	35
Installing more speed cameras	35
Heavier penalties for drivers who exceed the speed limit	31
Installing speed limiters on trucks and vans to stop them going too fast	31
On the spot speeding fines	31
Banning people from driving for 3 months if doing more than 30 mph over limit	30
Installing speed limiters on cars to stop them going too fast	26
The police enforcing speed limits more strictly	23

Base: All motorists
Source: RAC Report on Motoring 2002

“A well marked police car is the most effective deterrent to speeding.”

“(I would like to see) a warning sign which flashes to say you are exceeding the speed limit, before you come to the speed camera.”

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

The most effective way to change behaviour through punishment is when detection is sure and punishment is swift and certain. That only a quarter of ‘flashed’ drivers were subsequently brought to book, and that two thirds were detected but not punished, sends out an inconsistent message that seriously detracts from the effort to change speeding behaviour that is at the heart of the current national speed camera enforcement initiative.

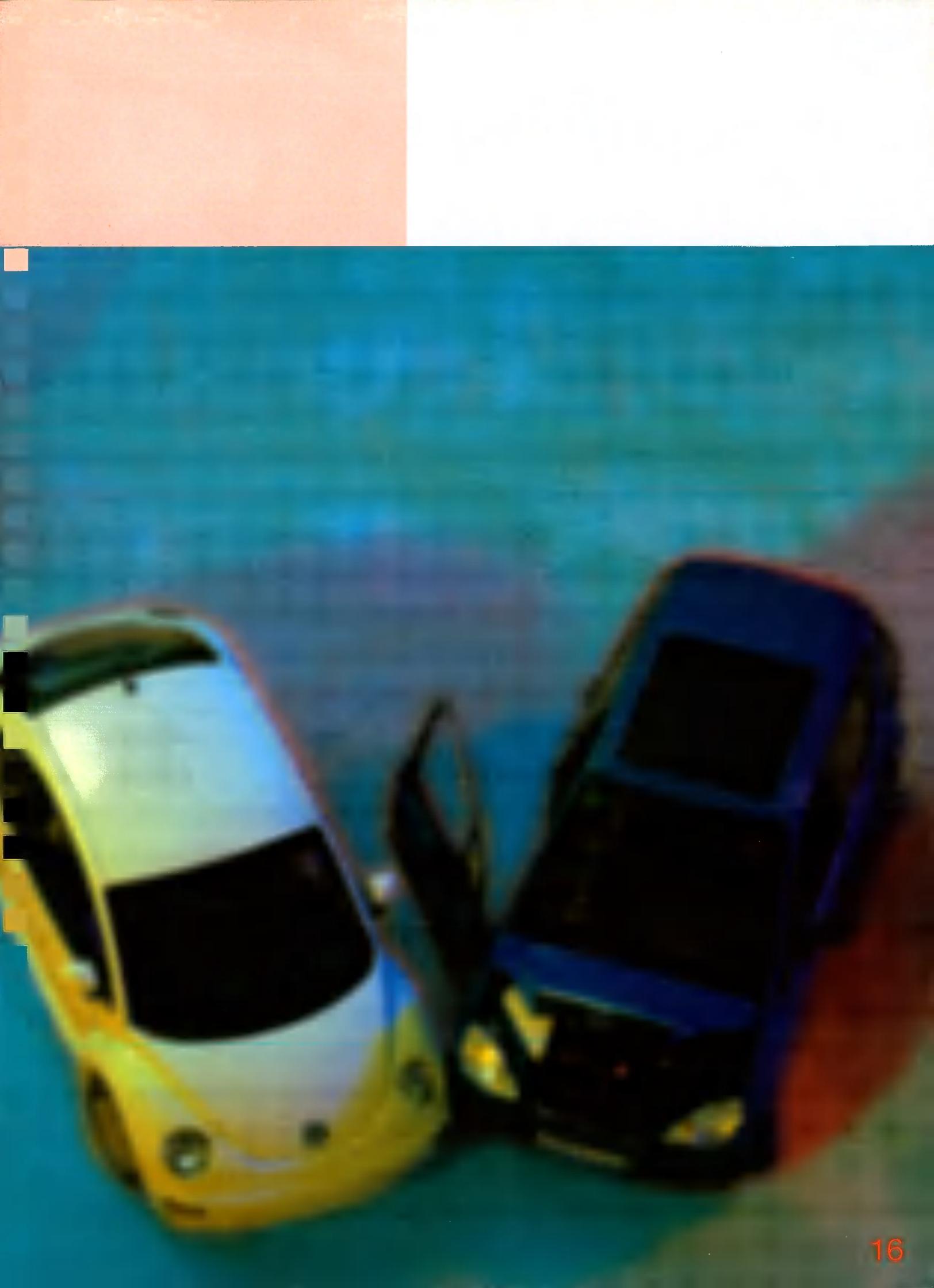
Preferred penalties for speeding, even speeding ‘well over the limit’, are routinely lower than preferred penalties for drink driving. A number of previous studies have also reported that speeding is perceived as being low on the crime tariff and, indeed, for many motorists and non-motorists, is seen as not a ‘real crime’, just a breach of a code of conduct.

This is part of the reason why DTLR are finding it much more difficult to reclassify speeding in the public mind as antisocial behaviour, compared with drink-driving. That, and the fact that the decision to drive after drinking is, typically, a one-off decision, whereas refraining from speeding requires a concentrated effort of will throughout the whole journey.

Section 2:

Going too fast – accidents on the road

- Speeding is seen as the main cause of accidents followed by driving too closely to the vehicle in front and drink driving
- Young drivers are considered the most to blame for accidents but older people and company car drivers are also seen as contributors
- There is strong support for banning mobile phones in cars
- Drivers feel that they could make their own contribution to safer driving by being more careful and considerate
- Drivers blame others for accidents and only a quarter take responsibility for their last accident
- Motorists of all ages were supportive of refresher training for all drivers



Section 2:

Going too fast – accidents on the road

Introduction

Driving too fast is the principal cause of road accidents. That is the main perception of motorists questioned for the report – a perception which is extremely difficult to support with hard evidence due to the current methods of accident recording in the UK, although safety experts believe that driving at the wrong speed for the road and conditions is a major contributory factor to accidents. The experts also believe that lower speeds result in fewer collisions and that these are of less severity⁴.

What hard evidence does show is the reality of death through a road accident affecting ten families on average every day in Britain. Although a significant figure, it remains the lowest in Europe and continues to decline despite the increase in road traffic. Interestingly, the 'perception and reality gap' is also significant, with motorists estimating road deaths to be considerably higher than they actually are.

This section of the report highlights motorists' views on the causes of accidents and the steps they believe could be taken by government and individuals to continue to reduce them.

Key research findings

- Speeding is perceived as the main cause of accidents by 45% of motorists – followed by distractions, drink driving and driving too close to the vehicle in front
- Motorists tend to greatly over-estimate the number of people who die on the roads each year. Half of motorists provided an estimate and the average of these was 16,000 per annum. The reality in 2000 was 3,400 people
- Drivers increasingly blame others for accidents and only a quarter take responsibility for their last accident
- 55% of motorists consider young drivers as the most to blame for accidents – but older people (31%), commercial vehicle drivers (vans and lorries – 26%) and company car drivers (17%) are also seen as contributors
- In reality more elderly drivers are reporting that they have been involved in an accident than in 1996, while the research indicates a reduction in the accident rate among younger drivers
- There is strong support for banning the use of mobile phones in cars, with 42% suggesting that this should be the government priority to reduce accident rates. 31% cite increased enforcement of all offences
- Drivers with points on their licence are more likely to have been involved in an accident than those with no points – and the research indicates growth in the proportion of drivers with points on their licence since 1999. Company car drivers are twice as likely to have points on their licence as private drivers
- Drivers feel that they could make their own contribution to safer driving by being more careful and considerate although 1 in 3 older drivers don't know what they could do to reduce their chances of being in an accident
- Motorists of all ages are supportive of periodic refresher training for all drivers (57% agreed, and only 27% disagreed, that it was necessary)
- Teenage pre-drivers are currently demonstrating responsible views: they strongly support responsible driving being part of their school curriculum (83% agree)
- They suggest their driving test should include hazard perception (80%)

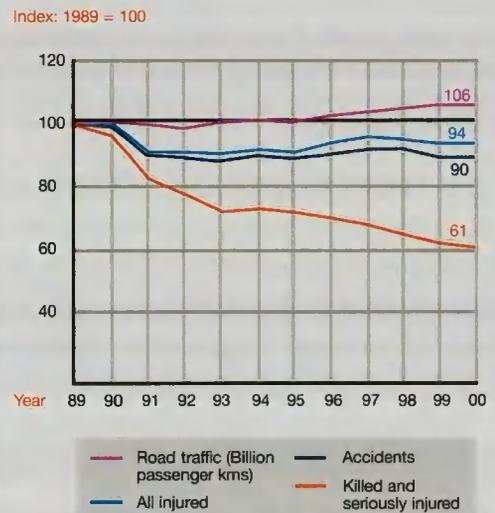


"People get into bad habits and need to cope with the roads as they become busier."

2.1 Accident rates

The number of people killed on Britain's roads, although still tragically high at 3,400 per year, represents 5.9 fatalities per 100,000 of the population, the lowest figure in Europe, and less than half the rate in the USA⁵. The number killed and seriously injured (broadly defined as those requiring hospital treatment) on Britain's roads has fallen by more than a third since 1989 despite an increase of 16% in road traffic over the period⁶. The record for children's fatalities and accidents, however, is not as good, with Britain appearing half way down the league table.

Figure 2.11
Trends in road casualty rates compared with traffic



This improvement is largely attributable to safer cars, better roads, the wearing of seat belts and the reduction in drinking and driving, supported by a significant government road safety programme.

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

While the number of people killed and seriously injured continues to fall, the number of "all injury" accidents has, at best, simply remained constant while the number of "non-injury" accidents has increased. This suggests that the total is remaining constant but that migration occurs from more to less severe categories. The number of injuries to pedestrians, children and, especially, child pedestrians continues to cause concern.

This may be due to two factors:

First, the continuing rise in road traffic and the concomitant increase in congestion decreases the opportunities for going fast and thus may be playing a part in reducing the number of high speed collisions and the likelihood of serious injury or death.

Second, the improvement in car design and the wearing of seat belts reduces the injury to the car user but more vulnerable road users remain as vulnerable as they always were. We may have, in Mayer Hillman's memorable phrase, "exported death out of the car".

Figure 2.12
Awareness of accident rates

“How many people do you think die on the roads each year?”

“How many people do you think die from accidents at home each year?”

“How many people do you think die from accidents at work each year?”

	Average	Actual * (2000)	% Saying “Don’t know”
Road deaths	16,000	3,400	52%
Accidents in the home	10,000	3,800	57%
Accidents at work	5,000	4,300	57%

Base: All motorists
Source: RAC Report on Motoring 2002*/Office for National Statistics

While each road death represents a personal tragedy, the number must also be seen in the context of other accidental deaths in the home and at work and elsewhere.

Perception and reality are clearly divided, as motorists tend to greatly over-estimate the number of people who die accidentally. The wide range of estimates and the high proportion who do not know (well over half) suggest that people do not have a clear idea of the risk on the road or in the home (although their estimates for accidental deaths at work are closer to the actual). However, in this particular case, maintaining the current perceptions can do little harm if it encourages safer motoring practices. The following section specifically looks at the causes of accidents on the roads and some possible solutions.

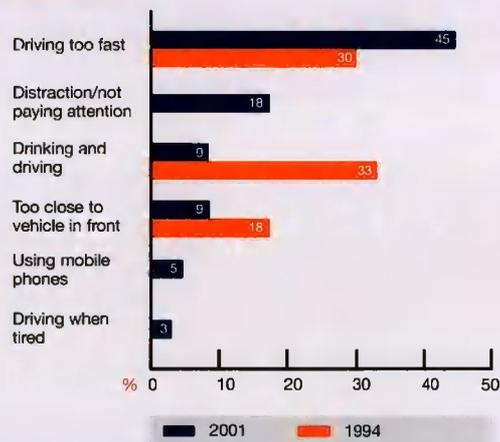
2.2 Accidents on the road

Drivers were asked what they thought were the main causes of accidents on the road. Four fifths of drivers mentioned speeding, significantly more than in 1994. Almost two thirds mentioned one of driving too close to the car in front (“tailgating”), drinking and driving, not paying attention, using mobile phones and driving when tired.

Figure 2.21
Main causes of accidents

“Which is the main cause of accidents on the road?”

Top 6 mentions



Base: All motorists
Source: RAC Report on Motoring 2002

“Remind people of speed limits and new laws and road signs.”

When asked to pick the one main cause, the rankings were similar, with speeding still top of the list. The effectiveness of the government’s anti-drink and drive campaign can be seen by the lower ranking of drinking and driving as a perceived cause of accidents compared with 1994, when it was seen as the biggest problem.



Mobile phones are also blamed, even though nearly half of drivers use them in their car, usually without a hands free kit and acknowledging that it is very dangerous (RAC Report on Motoring 2001). Fewer drivers see driving when tired as a safety problem, although last year's report highlighted that one in six drivers admitted to falling asleep or nodding off at the wheel. There is a hard core of "sleep" drivers – 6% had felt tired or fallen asleep at the wheel 10 or more times in previous year, accounting for 26% of all "sleep driving" incidents.

As already mentioned, identifying the true causes of road accidents is extremely difficult. The government collects statistics on accidents in terms of different classes of road users, their location and any injuries or damage sustained, they do not necessarily give the cause of accidents. Many accidents are the result of several factors and one "cause" may be linked with another. For example an inexperienced driver might drive too fast: which is the prime cause – the inexperience or the speed?

Research by D Parker and S Stradling⁷ on the causes of accidents categorises driver behaviour into three classes:

- 1 Lapses – misreading signs, getting in the wrong lane, reversing into a car you had not seen;
- 2 Errors – failing to see a cyclist or a pedestrian, not using mirror before changing lanes, braking too quickly;
- 3 Violations – disregarding speed limits, going through a red traffic light, drink driving, overtaking on the inside.

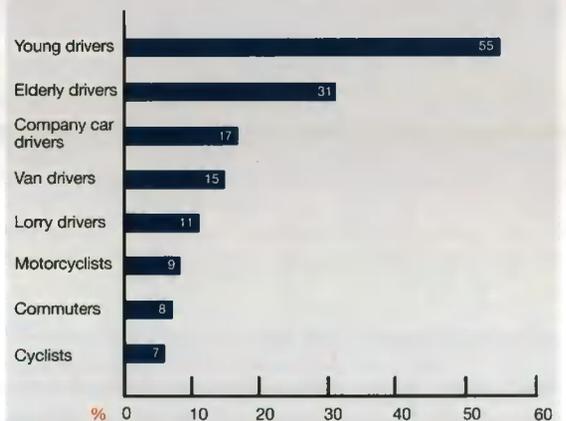
Their research has shown that "violations" in conjunction with "errors" cause crashes.

While increased driving skill and experience reduces errors and lapses, violations tend to reflect consistent attitudes. Violations are generally avoidable and, by and large, are committed intentionally.

Young people are most likely to be blamed for accidents by other motorists (55%), followed by elderly people (31%). Older drivers (over 55 years) blame younger drivers more, while younger drivers in turn tend to blame older drivers for accidents. One in four motorists blames commercial vehicle drivers. Company car drivers also receive a fair share of the blame, which is borne out by the reality that they have had more accidents than any other group of motorists, even allowing for the greater mileage they do – possibly reflecting the greater pressure they are under.

Figure 2.22
Who is to blame for accidents?

"Which of the following groups do you think is most to blame for accidents?"



Base: All motorists
Source: RAC Report on Motoring 2002

Comment from Kevin Delaney, Traffic and Road Safety Manager, RAC Foundation for Motoring

The lack of hard statistical information about the causes of road traffic accidents is worrying, especially as the government is committed to a comprehensive and expensive national road safety strategy and ambitious casualty reduction targets. The success of the strategy will depend not only on the long term availability of resources, but also a reliable method of recording and gathering detailed information on the primary causes of road accidents.

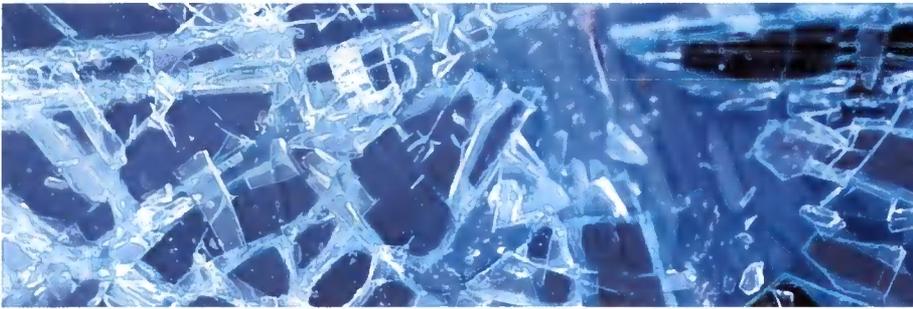
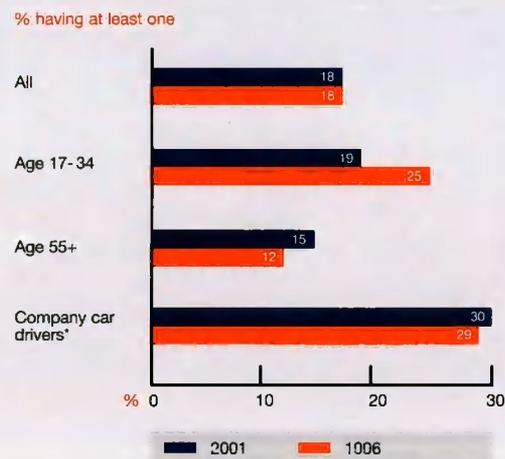


Figure 2.23
Frequency of accidents

How many accidents have you had in the past three years?



Base: All motorists
(*Employer provided Don't knows excluded from analysis)
Source: RAC Report on Motoring 2002

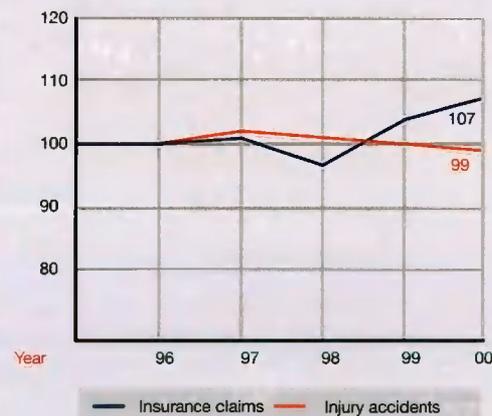
The 2001 RAC Report showed that a quarter of those in work felt their employer put them under pressure at some time in the last three years to get to their destination on time. Nearly one in ten felt they were set unrealistic targets which made them drive too quickly or for too long without a break.

The overall standard of driving remains static, judging by the number of drivers who say they have had at least one accident in the past three years, although it is possible that some of those who say "don't know" may have had an accident but are not prepared to admit it. The number of accidents mentioned is much lower than the number of claims recorded by insurance companies which has risen slightly in recent years.

Older drivers (over 55 years) are less likely to have accidents while drivers of company cars have more, which, as noted before, cannot totally be accounted for by their higher mileage.

Frequency of accidents tends to be linked to experience: 21% of those who have been driving less than 5 years have had an accident in the past three years compared with 13% for those with more than 20 years' experience. Elderly drivers appear to have become more accident prone since 1996 but there has been an improvement among younger drivers. This is consistent with the reduction in serious accidents to car drivers recorded by the police which fell by 15% overall from 1996 to 2000, with the proportion where the driver was aged 17-24 dropping by 25% but those for over 60's by only 7%.

Figure 2.24
Total motor accidents



Source: Transport Statistics GB 2001/Association of British Insurers



Drivers feel that the government has a central role to play in changing attitudes – the perceived success of the seat belts and drink drive campaigns supports the effectiveness of advertising in the minds of motorists. The government's own priorities in the road safety strategy "Tomorrow's roads – safer for everyone" focus on children, driver training, the dangers of drugs, drinks and drowsiness, speeding and improving vehicles and roads. It also highlights vulnerable road users such as motorcyclists, cyclists and pedestrians and the effects of enforcement and education for all road users.

Despite their perception that speed is the most significant cause of accidents, motorists suggest the main priority for the government should be to stop the use of mobile phones (although this ranked only fifth in their perceived causes), followed by increased enforcement of offences in general.

The emphasis motorists place on driver training reinforces the need to reduce the accident rate amongst young drivers (aged 17-21), who represent 7% of the licence holders but 13% of those involved in injury accidents⁸. Many experienced drivers feel that regular training is unnecessary (section 2.4) but this was brought into sharp contrast by the reality of accident rates among older and company car drivers (figure 2.23).

Drivers' perceptions of appropriate mandatory speed limits vary, with some wanting them reduced and others wanting them raised. This could reflect the fact that it is inappropriate speed, rather than absolute speed itself, which causes the greatest danger.

Drivers also see an opportunity for the government to make its contribution to safety through building wider roads and more roads or dual carriageways.

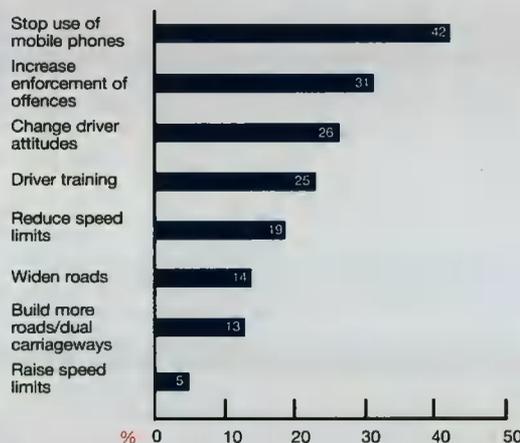
Drivers do not spontaneously mention any of the issues surrounding child-related road accidents. Other research has identified the main problem as 11-14 year olds, who are old enough to be unaccompanied but not always responsible enough to look after themselves on the roads⁹.

When motorists are asked about improving their own driving, a quarter could not identify anything they could do. This proportion ranges from 21% for young drivers to 34% for older ones, showing that experience increases confidence – or perhaps complacency – in their own driving. The main improvements to individual driving would come from driving more carefully and considerably, allowing more time and driving more slowly, all features which many would say are harder to achieve with today's hectic lifestyle.

Although they feel that the government should encourage drivers to give up using their mobile phones in the car and to have additional training, when asked how they personally could reduce their chances of being in an accident, few motorists suggested giving up using their mobile phone in the car (5%) or additional training (3%). As with admitting to speeding, this could suggest a perception that 'I act safely – it is the use of mobile phones by other drivers that is dangerous'.

Figure 2.25
Government's priorities to reduce accidents

"What in your opinion should be the government's priority to reduce accidents?"



Base: All motorists
Source: RAC Report on Motoring 2002

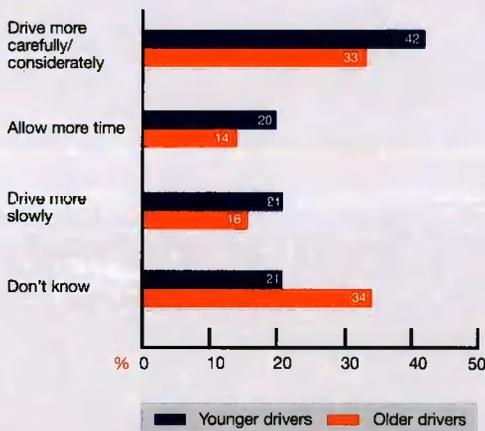


Company car drivers are twice as likely to mention giving up using their mobile phones in the car as private drivers – but then twice as many of them use mobile phones in their car. No official statistics are available on the contribution mobile phones make to accidents.

Most accidents do not involve injury and are not reported to the police, with the insurance industry's figures showing about 20 times as many insurance claims as injury accidents. However, one incident may result in more than one motorist making an insurance claim while some minor incidents will go unrecorded as the driver pays for the repair without involving the insurance company.

Figure 2.26
Personal changes to reduce accidents

“How could you personally make a change to your driving to reduce the chance of an accident?”



Base: All motorists
Source: RAC Report on Motoring 2002

Figure 2.27
Responsibility for accidents

“Thinking about your most recent accident, whose fault was it?”



Base: All motorists who have had an accident in the past three years
Source: RAC Report on Motoring 2002

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

As noted, driver behaviour research distinguished three types of aberrant behaviour on the roads: violations of the formal and informal rules of the road; errors of observation and judgement; and lapses of attention and concentration. Most of the factors that drivers thought were the main causes of accidents (Section 2.2) are driving violations: speeding, close following, driving under the influence of drink or drugs, and failing to communicate changes of direction to other road users through not signalling one's intentions. The other main category is diversions of attention from the road, either through a general diminution of attentional resources when fatigued, or with attention captured by a competing – and attention demanding – task such as mobile phone use.

The fact that drivers with points on their licence are more likely to have been involved in accidents also corroborates figures we have from a recent study. Possessing penalty points is a good indicator that a driver poses a greater risk to themselves and to (generally more vulnerable) others on the road.

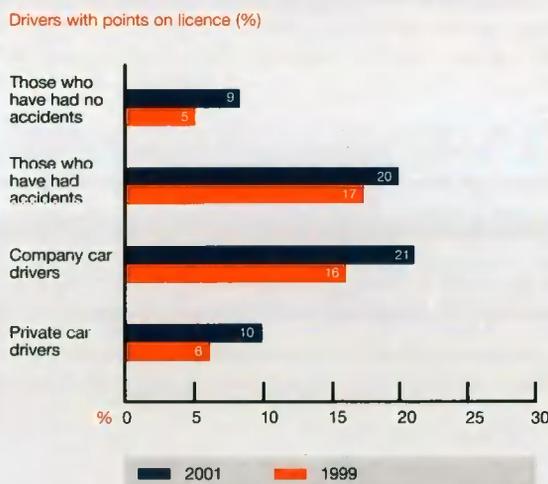


Well over half of drivers blame someone else for their last accident with only a quarter saying it was entirely or mostly their fault. Over the past five years there has been a slight shift towards blaming someone else – anecdotally, motorists have cited insurance companies advising people not to admit liability in an accident, which could contribute to this trend. Company car drivers are more likely to take the blame: this may be a reflection of their driving standards but it might also be a consequence of them often not paying their own insurance.

Most drivers have clean licences with no points but the proportion is falling, possibly because of the increase in the number of fixed penalty notices, for speeding past a camera, for example. Company car drivers are more likely than private drivers to have points on their licences.

Where a driver has points on the licence, it is likely to be only three points, equivalent to one offence, but 14% of drivers refused to reply or cannot remember, compared with 10% in 1999. Drivers who have had accidents are twice as likely to have points on their licence compared with those who have not had accidents, although it is possible that the points arose from the accidents themselves.

Figure 2.28
Points on licence



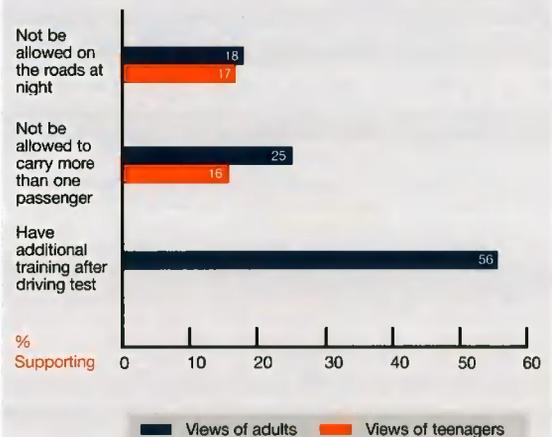
Base: All motorists
Source: RAC Report on Motoring 2002

2.3 Newly qualified drivers

Young, newly qualified drivers are an important factor in accidents, based on actual experience as well as motorists' perceptions (as shown in section 2.2). A number of proposals have been put forward to reduce the risk of them having an accident until they have improved their skills.

Figure 2.31
Newly qualified drivers

“New drivers should...”



Base: All motorists. All teenagers
Source: RAC Report on Motoring 2002

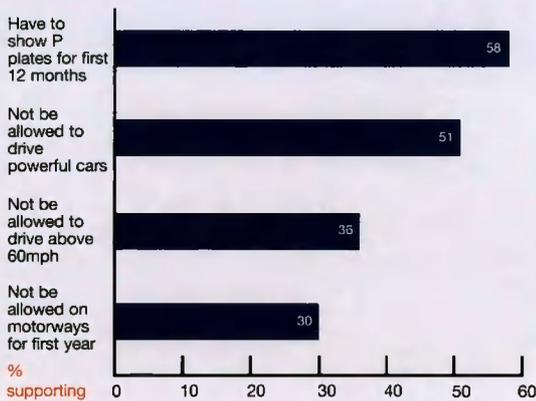
It is not surprising that neither young motorists nor teenagers, who are about to become the next generation of drivers, support a ban on night driving for newly qualified drivers or a restriction on them carrying more than one passenger – motorists generally do not support these ideas either. Both young and experienced drivers do support additional training for newly qualified drivers after passing their test. The government's Pass Plus scheme for post qualification experience, supported by the insurance industry, is beginning to gain momentum, with new drivers gaining a reduction in insurance premiums for those who participate. The number of new drivers taking up the scheme is rising and now exceeds 10% of those passing their test.



Figure 2.32

A newly qualified driver – teenagers' views

“A newly qualified driver should...”



Base: All teenagers
Source: RAC Report on Motoring 2002

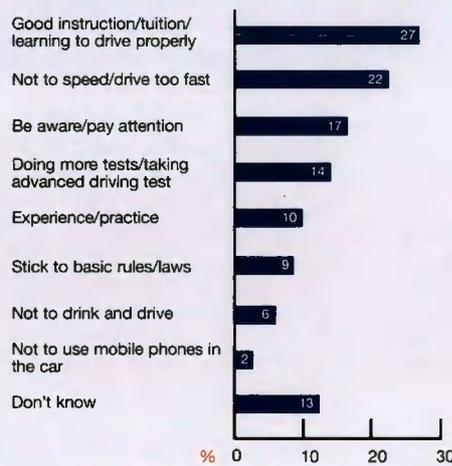
The majority of teenagers feel that newly qualified drivers should have a P plate and should not be allowed to drive powerful cars. There is also some support for other restrictions on those who have just passed their test, such as a 60mph limit or a ban on motorway driving.

Teenagers would like to start their driver training at school with the curriculum including lessons on using the car responsibly and actual driving lessons. The driving test should include hazard perception (to be included in the theory test in 2002) and motorway driving, although 30% do not agree with learners being allowed on motorways. Changes to the minimum age – either upwards to 18 or downwards to 16 – receive low support, as does making the driving test easier.

Figure 2.33

Teenagers' views on safe driving

“What do you think is the best way of becoming a safe driver?”



Base: All teenagers
Source: RAC Report on Motoring 2002

“The training should cover courtesy on the road, keeping distance, not rushing.”

Figure 2.34

Changing the way people learn to drive

“Do you agree or disagree with the following?”

Statement	% Agreeing
The school curriculum should include lessons about using your car responsibly	83
The theory test should include a section on ability to see hazards on the road ahead	80
Motorway driving should be part of the driving test	78
The school curriculum should include driving lessons	70
Learners should be allowed on motorways	40
Change the minimum driving age to 16	39
Make the practical driving test tougher and longer	31
Change the minimum driving age to 18	27
The practical driving test is too hard and should be made easier	23

Base: All teenagers
Source: RAC Report on Motoring 2002



2.4 Additional driver training

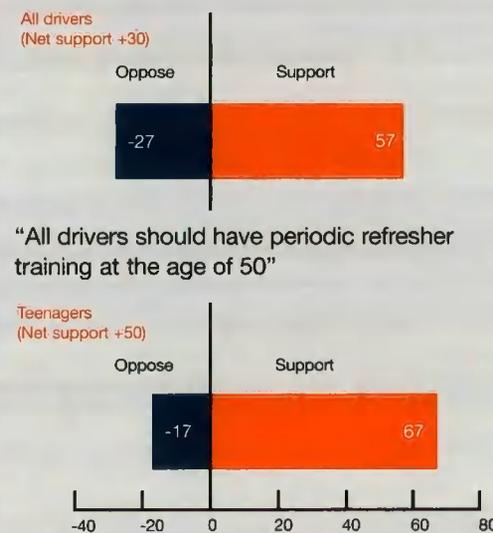
One way of improving the standard of driving is to offer refresher training to all drivers.

"I think there would be less accidents if there was additional driver training. At stages after their test, perhaps every 10 years."

Motorists of all ages are in favour of extra training for all drivers – typically every five to ten years rather than at a fixed age, such as 65. Young drivers (aged under 34) prefer 10 year intervals. Drivers aged over 35 are more supportive of five years. Surprisingly, there was only limited support (4%) for additional training after a driving offence but this was more popular among older drivers who, as noted above, are less likely to have committed an offence.

Figure 2.41
Refresher training

"All drivers should have periodic refresher training"



Base: All motorists. All teenagers
Source: RAC Report on Motoring 2002

In view of the concern about company car drivers, all those in work (whether they had a company car or used their own car for work driving) were asked whether employers had provided additional training, whether they should provide it and if so what it should cover.

Six in ten company drivers, and a similar proportion of those who drive their own private car in the course of work, have not had any training from their employers. However, just over half of both groups (56%) do not feel that driver training is necessary – a perception not matched by the reality of accident rates of company car drivers. Legislative proposals may, however, force employers to provide driver training as a matter of necessity in the future.

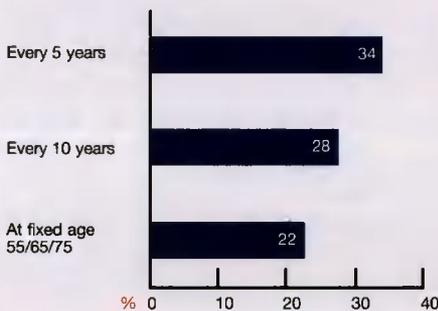
"Good idea. I passed my driving test 19 years ago and I don't know as much now. People get complacent."



Those who said there should be training suggested it should cover safer driving generally, safety checks on their car, eradicating bad habits, awareness and anticipation and the dangers of driving for too long without rest. Company car drivers were particularly concerned about eradicating bad habits and improving fuel efficiency.

Figure 2.42
Frequency of refresher training

“How often do you think drivers should have periodic refresher training?”



Base: All motorists who agree with refresher training
Source: RAC Report on Motoring 2002

Most drivers (60%) would expect their employers to pay for training; a third (30%) thought the government should cover the cost while the remainder suggested insurance companies or even employees themselves should pay.

Figure 2.43
Employer provided driver training

“What should be covered by training by employers in relation to cars?”

“For which of these have you personally received training?”

%	Should include (1)	Have had (2)
Safe driving generally	83	11
Basic car safety checks	54	10
Eradicating bad driving habits	52	5
Awareness and anticipation	42	7
Not driving too long	41	6
First aid	40	18
Highway Code	35	14
None	na	61

Base: (1) All motorists who think employers should provide training
(2) All motorists in work
Source: RAC Report on Motoring 2002

“A sound idea. Although don't know if it would work in practice. It would increase standards generally. We all become complacent.”

“I think that would be good. I would be happy to partake in that. For people who passed a while ago it just teaches them the new rules and new skills.”

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

That over half of drivers believe there should be periodic refresher training for all drivers and that many feel this should happen every five or ten years is a very important finding. At present there is a yawning gulf between rudimentary, compulsory, initial training and voluntary advanced training. And the kinds of drivers who volunteer for such advanced training are probably those least in need of it – seeing the need to improve your driving is probably nine points of the way to effecting improvement!

There are three components to becoming a good driver. Driving involves technical mastery, learning to control the vehicle; reading the road and detecting hazards in order to anticipate where and when changes to speed or direction might be needed; and driving is also an expressive activity, with what and how you drive expressing something about your identity, individuality and personality to other actors on the theatre of the road. The initial driving test concentrates largely on the first of these: it is a necessary but not sufficient condition for safe use of the car. But it grants a licence to indulge in the third component, doing ‘Look at me!’ driving. Drivers develop bad habits behind the wheel which generally go uncorrected. Really bad drivers may be removed from the road through disqualification. Others may receive a warning, the ‘yellow card’ of a speeding ticket, a shunt or a near miss. The provision of updated, refresher training at regular intervals or at specified points in the driving career would signal that the government thinks that improving the quality of driving on UK roads is a matter of some importance to which resources should be deployed.

Section 3

Going too slow – the problems of congestion



- Most drivers remain committed to their cars and will not easily switch to public transport
- Despite their dependence on the car, most motorists can identify a car journey they could give up
- Congestion is worse for everyone else – “it’s not too bad for me”
- Too many cars and road works are perceived to be the main causes of congestion
- People taking their children to school and commuters are seen by motorists as the main contributors

Section 3

Going too slow – the problems of congestion

Introduction

Every year the issue of congestion raises increasing concerns about travelling freedom. Motorists' perceptions of the general solutions to congestion often differ from the reality of their own situation. The fact remains that Britain is a car-dependent society, but now it is also true that motorists are simply accepting congestion as part and parcel of everyday motoring.

Over the past ten years, nearly every EU country has seen an increase in the proportion of passenger kilometres travelled by car and a corresponding decline in the proportion by public transport¹⁰. In the UK, road capacity has not risen as fast as the increase in car usage and congestion has been the inevitable result. Motorists recognise that there are ways of changing car use and encouraging the use of alternative modes of transport which can reduce the pressure. However, in reality they will either sit in a traffic jam, or find any solution they can to remain in their cars, rather than use the alternatives.

This section reviews dependence on the car and the problem of congestion – what is it and is it really a serious problem?

Key research findings

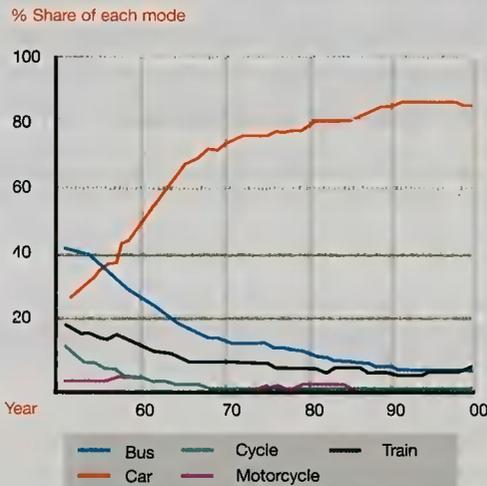
- The vast majority of drivers (83%) remain committed to their cars
- Only 36% of motorists would use their car less if public transport were better – unchanged from 2001
- Congestion means different things to different people, but does not mean unexpected delays
- Typically congestion adds around a third to journey times and a fifth to the annual cost of running a car
- Motorists throughout the country think congestion is a very serious problem in London generally (rating of 2.8 out of 3 where 3 = very serious problem) – and 74% of Londoners agree. However, when asked how it affected them personally, London's motorists only rate congestion at 1.5
- Similarly, those who live in town centres rate the problem for them personally only 1.2, whereas motorists generally rate congestion in major cities at 2.4
- Too many cars (41%) and road works (18%) are considered the main causes of congestion. One in ten motorists blame public transport and a similar proportion the school run
- Many teenage pre-drivers already consider themselves reliant on a car (74%) and 89% want to drive as soon as they turn 17



3.1 Reliance on the car

The car has become an integral part of modern living – 85% of passenger kilometres are travelled by car, 73% of households own a car and, even in those households without cars, many journeys are undertaken by car as passengers. The average mileage driven per car has though, remained relatively constant (figure 6.22).

Figure 3.11
Long term share of surface transport



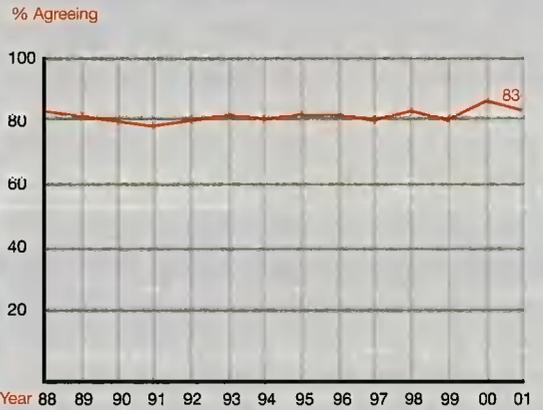
Source: Transport Statistics GB 2001

Drivers remain as dependent as ever on their cars with 83% saying they would find it very difficult to adjust their lifestyle to being without a car, slightly lower than the record high figure of 86% recorded in 2000 at the time of the fuel crisis.

The next generation of drivers, teenagers aged 13 to 16, are only slightly less dependent on the car, with 74% agreeing that they would find it difficult to adjust their lifestyle to being without a car. 89% of them want to drive as soon as they are 17, 85% of them think they will take their test by 18 and 54% expect to have their first car at 17 or 18.

Figure 3.12
Dependence on the car

“I would find it very difficult to adjust my lifestyle to being without a car”



Base: All motorists
Source: RAC Report on Motoring 2002

Motorists' willingness to use their cars less if public transport were better remains at 36% – much lower than the peak of 45% in 1997 when Labour came into office. The 2001 RAC Report revealed that “better” meant more frequent, cheaper and more reliable services, conclusions also reached by the Commission for Integrated Transport’s research¹¹. Because they use their cars more intensively, only 29% of company car drivers would consider using public transport more if it were improved. Even in the peak year of 1997, only 33% of company car drivers would consider it.

Although there are many reasons for car dependence, such as speed and the convenience of a door to door journey, 70% of drivers also say their car gives them privacy which they cannot enjoy with public transport.

“If public transport were better, I would consider leaving my car at the edge of town and getting the bus for the rest of the journey.”

“We are disabled and couldn’t go anywhere if we did not have a car.”

“I am a car freak, I love my car.”

Figure 3.13
Willingness to use public transport

"I would use my car less if public transport were better"

% Agreeing



Base: All motorists
Source: RAC Report on Motoring 2002

The TGI attitude survey¹², the largest general household behaviour and attitude study in the UK, reinforces our findings on drivers' dependence on their car with only 8% of UK driving licence holders agreeing with the statement 'Whenever I can choose between car and train, I choose the train'.

41% of teenagers believe their parents should use their cars less but 60% disagree. When asked to what degree their parents should restrict their use of the car, one in ten thought they should cut back their driving a lot, a third said a little and half said they should not change. One in ten said they would like their parents to increase the use of their car.

Figure 3.14
Teenagers' views on parents' use of the car

"Which of these statements do you agree with most?"

%	2001*	1998
I would like my parents to cut down drastically on the amount they drive	3	3
I would like my parents to cut down quite a lot on the amount they drive	6	13
I would like my parents to cut down a little on the amount they drive	32	33
I would not like my parents to change the amount they drive	49	39
I would like my parents to drive more than they do	10	12

Base: All teenagers
Source: RAC Report on Motoring 2002

*Figures rounded

"I think I would use my car less if the frequency, convenience and cost of public transport were better."

"Public transport takes ages – and stops my freedom from going where I want to go."

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

As the UK road system grinds towards gridlock, despite the attractions of private over public transport, we have found in recent studies of both English and Scottish motorists that fully one third would like to use their cars less 'over the next 12 months'. The greater their mileage above 10,000 miles, the less they would really like to drive.

Undertaking any kind of journey makes demands upon the travellers' finite budget of personal resources. For potential users of public transport, 'better' means more frequent, cheaper and more reliable because this would mean them having to expend less time, less money and less effort – particularly emotional effort from the worry brought about by uncertainty over timely and safe arrival.

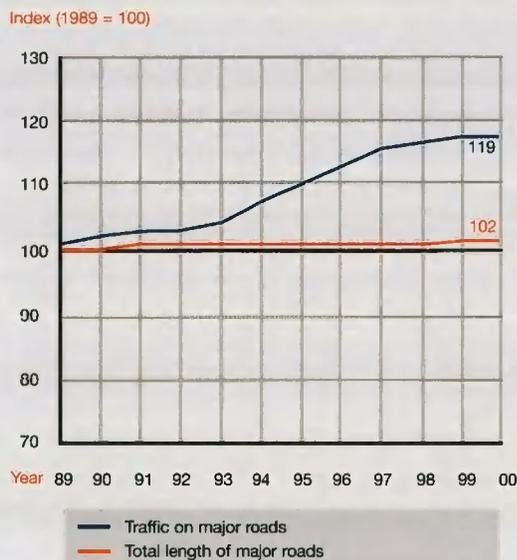


"(We) need to use our car because of the area where we live."

3.2 Congestion – defining the problem

Over the past ten years, traffic on major roads has increased by 19% while the length of those roads has remained static. As a result congestion has increased.

Figure 3.21
Growth in road length and traffic for major roads in Great Britain



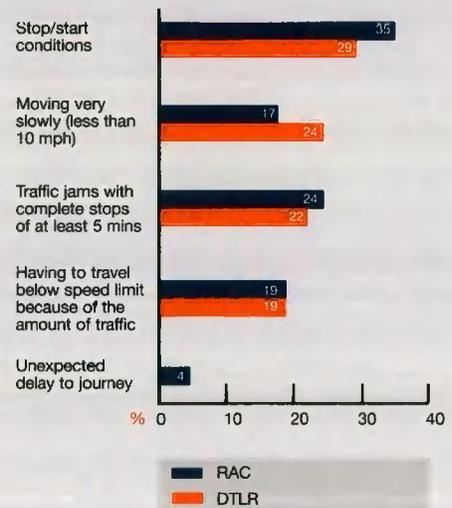
Source: Transport Statistics GB 2001

Congestion means different things to different people, varying from moving slowly to traffic jams to stop/start conditions. It does not mean unexpected delays to the journey which are explored in more detail in section 4.2. Drivers in towns mention slow moving traffic possibly because they experience it more often, while suburban and rural drivers notice stop/start conditions. DTLR research on the same question reinforces this spread of definitions¹³.

The most helpful measure from the DTLR research appears to be the amount of time motorists are held up in traffic jams, which covers both regular and unexpected congestion.

Figure 3.22
What is congestion?

"Which of these best describes what you mean by congestion?"

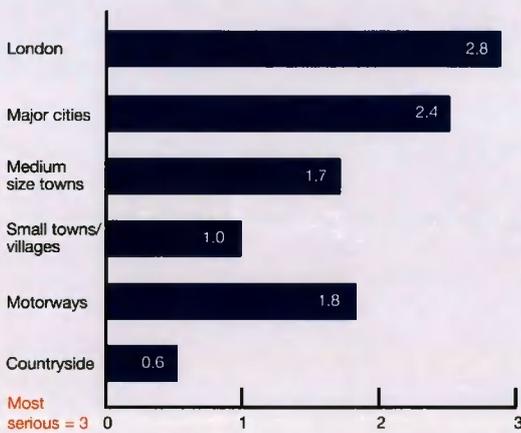


Base: RAC – all motorists/DTLR – all adults
Source: RAC Report on Motoring 2002/DTLR ONS survey July 2001

When it comes to congestion in general, as opposed to its personal effect, perceptions appear to differ considerably from reality, particularly with regard to London. Motorists throughout the country think congestion is a very serious problem in London (rating 2.8 on a scale from 3 = a very serious problem to 0 = no problem). This view may be influenced by the fact that the planned London congestion charge is receiving considerable publicity nationally. In other major cities it is perceived as nearly as bad (2.4). On motorways congestion is not considered as serious, while it is not seen as a problem in small towns or the countryside.

Figure 3.23
Perception of congestion

“How serious is congestion in the following areas of Britain?”

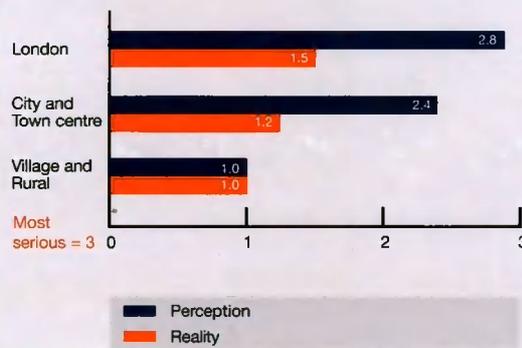


Base: All motorists
Source: RAC Report on Motoring 2002

Figure 3.24
“Reality” of congestion

“How serious is congestion in the following areas of Britain?” (Perception)

“How serious is congestion for you personally” (Reality based on those who live in the area)



Base: All motorists
Source: RAC Report on Motoring 2002

Those who actually live in London only rate congestion for them personally as 1.5 on the same scale. Similarly those who live in city or town centres rate the problem for them personally only 1.2. The reason for this divergence between perception of congestion and the reality for individual motorists is possibly due to drivers adapting their individual behaviour to anticipate congestion (see section 4.1).

Drivers who do high mileages are twice as likely to perceive that congestion is a serious problem as those doing low mileages.

In isolation, peak hours bring perception and reality somewhat closer. When asked about how serious a problem congestion is in peak hours in the area five miles around where they live, 74% of Londoners rated congestion a serious problem compared with only 37% of those who live in Scotland. The figures are virtually identical to the answers to a similar question asked in a DTLR survey.

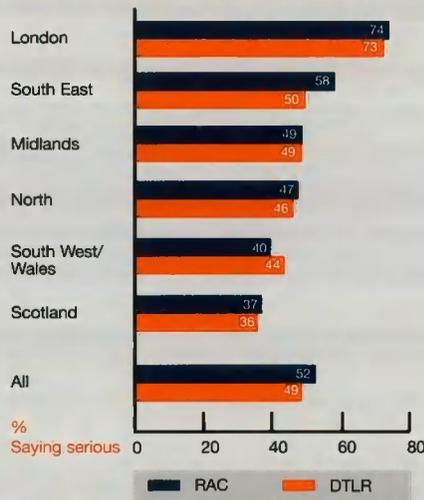
“I prefer using my car
– it’s easier.”



Figure 3.25
Congestion by region

“During peak times, how much of a problem is congestion in the area 5 miles around where you live?” – RAC

“How serious a problem is congestion” – DTLR



Base: RAC – all motorists/DTLR – all adults
Source: RAC Report on Motoring 2002/DTLR ONS survey July 2001

3.3 Causes of congestion

Too many vehicles, roadworks and the school run are seen as the main causes of congestion. Motorists were given a choice of 30 possible causes of congestion, asked to identify all major causes and then to pick out the one main cause. The rankings in the two surveys were the same – too many vehicles, roadworks and the school run – but roadworks are much more likely to be seen as a contributory cause rather than the main cause.

DTLR results, based on unprompted responses from a sample of adult drivers and non-drivers, are very similar to RAC's. The condition of the roads and the issue of speeding up road works to reduce congestion are covered in section 5.3.





Figure 3.31
Causes of congestion

“What is the main cause of congestion?”

Overall %	RAC	Detailed %	RAC	DTLR
Volume of traffic	60	Too many cars	41	60
		School runs	10	7
		Too many buses/lorries/vans	5	
		People making unnecessary journeys	4	
Road works	18		18	17
Public transport	10	Public transport not convenient/poor quality so people have to use car	8	na
		Buses stopping at bus stops/bus lanes	2	na
Road design	6		6	4
Accidents	3		3	4

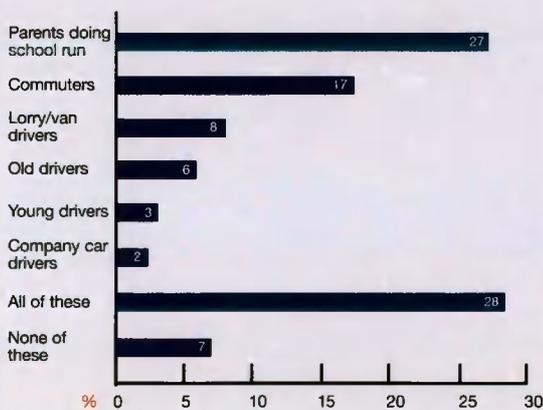
“I have to take the children to school as we don't have many buses near us.”

“I have to use the car really, especially for the children because they go to different schools.”

Base: RAC – all motorists choosing main cause from list/ DTLR – all adults, unprompted
Source: RAC Report on Motoring 2002/DTLR ONS survey July 2001

Figure 3.32
Contributors to congestion

“Which group of motorists is most to blame for congestion?”



Base: All motorists
Source: RAC Report on Motoring 2002

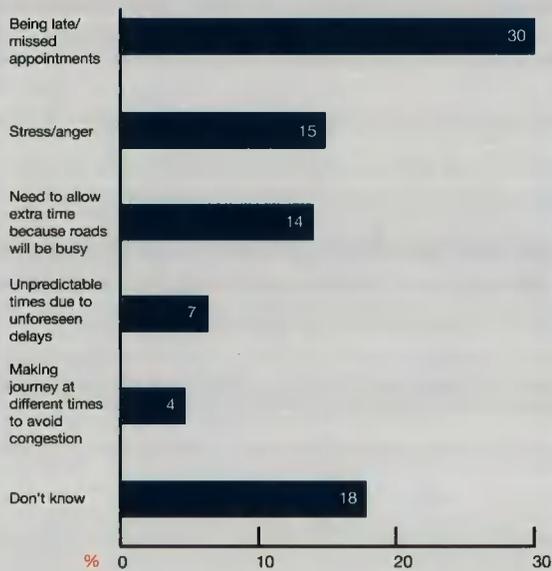
The school run is seen as a particular problem in London – where it is perceived as the main cause of congestion by 16% of Londoners compared with 10% overall. In reality, analysis of the National Travel Survey shows that the school run represents only 10% of term time traffic between 8 a.m. and 9 a.m. The RAC report shows that 10% of motorists blame congestion, for example, on public transport, by poor service forcing people into cars.





Figure 3.33
Perception of congestion

“What is the main problem that congestion causes you?”



Base: All motorists
Source: RAC Report on Motoring 2002

Parents on the school run and commuters were blamed most for congestion. The school run was particularly blamed by those without children. Younger drivers were more likely to blame older drivers.

Congestion makes people late, it makes them stressed and angry and forces them to allow extra time for their journeys. Company car drivers are particularly frustrated about being late and suffer more from stress and feeling tired. Older drivers, who often have more time, worry less about being late, but are much more concerned about the unpredictability of arrival time caused by congestion. DTLR results are very similar.

Bearing in mind the increasing time motorists are stuck in traffic jams, it is fortunate that today's cars provide opportunities to reduce the stress. Most cars today have radios and three quarters of drivers use them as a form of relaxation when stuck in a jam, although an appreciable number do nothing or just watch their fellow road users.

Anecdotally, motorists watching others in traffic jams have seen them get out, walk around and talk to other drivers. People have seen drivers using the hard shoulder, central reservation or pavement to beat queues, doing U-turns and even backing up motorway slip roads.

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

While cars have become ever more reliable, car use in the UK is becoming increasingly unreliable. And anything that impedes smooth progress on a journey is likely to prove a source of upset, frustration or even anger. Some – though not many – motorists attempt to reduce the uncertainty of current car travel by arming themselves with information before departure. Others rely on in-journey information sources to help reduce the uncertainty by providing forewarning of, or at least an explanation for, hold-ups. But when delayed, with the energy of frustration to expend, motorists demonstrate just how inventive they can be when under pressure.

3.4 The cost of congestion

Typically congestion adds just over a third to journey times. This is confirmed by the DTLR ONS sample which shows that a typical 20 minute journey takes an extra 5 to 10 minutes because of congestion. Estimates in the RAC Report on Motoring 2000 showed that this level of delay was equivalent to a cost of £23 billion per year based on the value of people's time, an estimate which excludes extra fuel costs, wear and tear, as well as the effects of congestion on freight and public transport.

Extra fuel consumption alone could amount to another £2.5 billion based on a conservative estimate of a 10% increase in fuel usage resulting from slower speeds. In total, therefore, RAC Motoring Services estimates that the cost of time and fuel wasted through congestion is over £1,000 per motorist, a fifth of the normal cost of running a car each year.

Figure 3.41
The time cost of congestion

"How long does your journey take with and without congestion?"

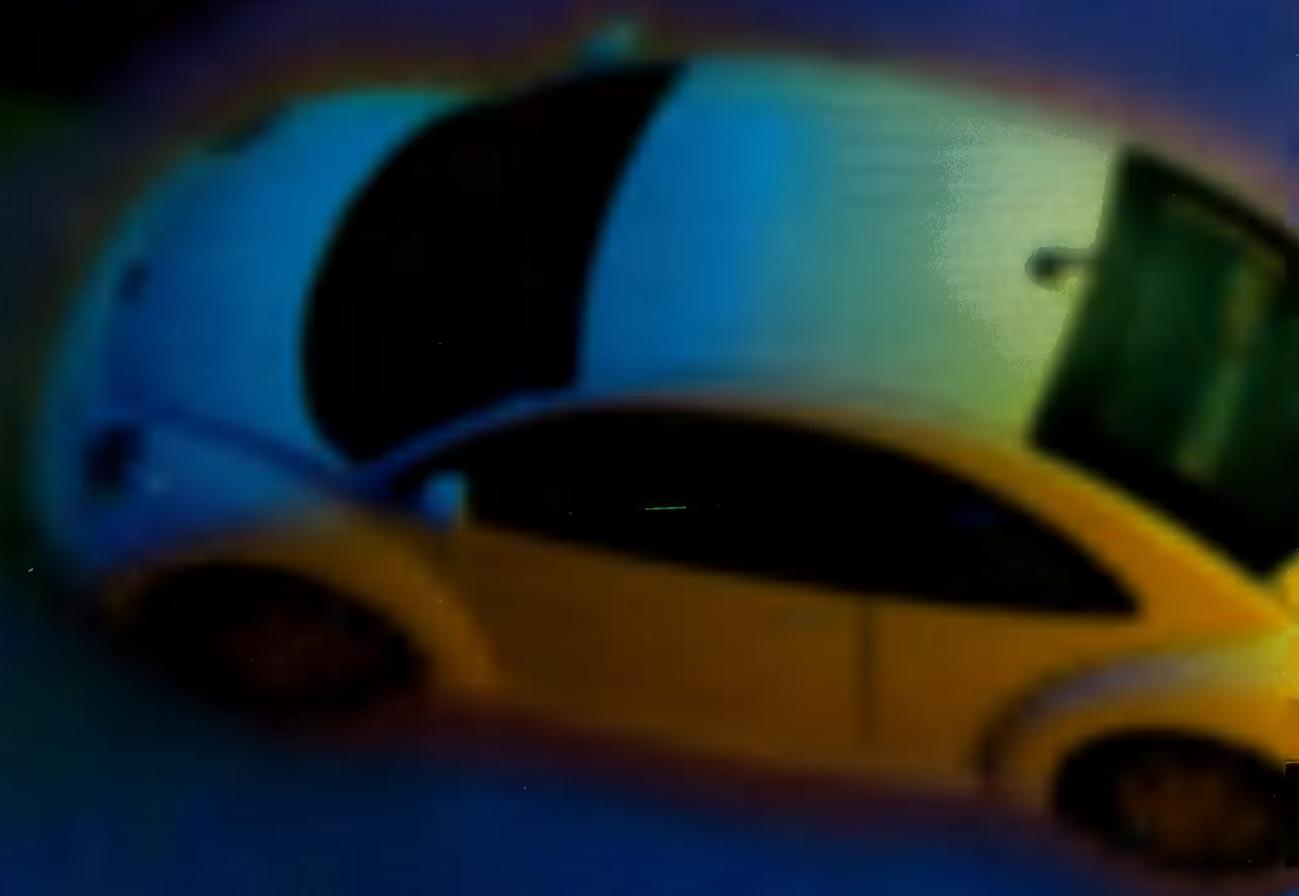
	Type of journey		
	Commuting	Connection with work	School run
Millions making journey	16.2	11.1	5.7
Time taken (minutes)	Per journey	Per week	Per journey
Journey with congestion	25	212	16
Journey without	18	179	11
Minutes of congestion	7	33	5
% added by congestion	39%	18%	45%

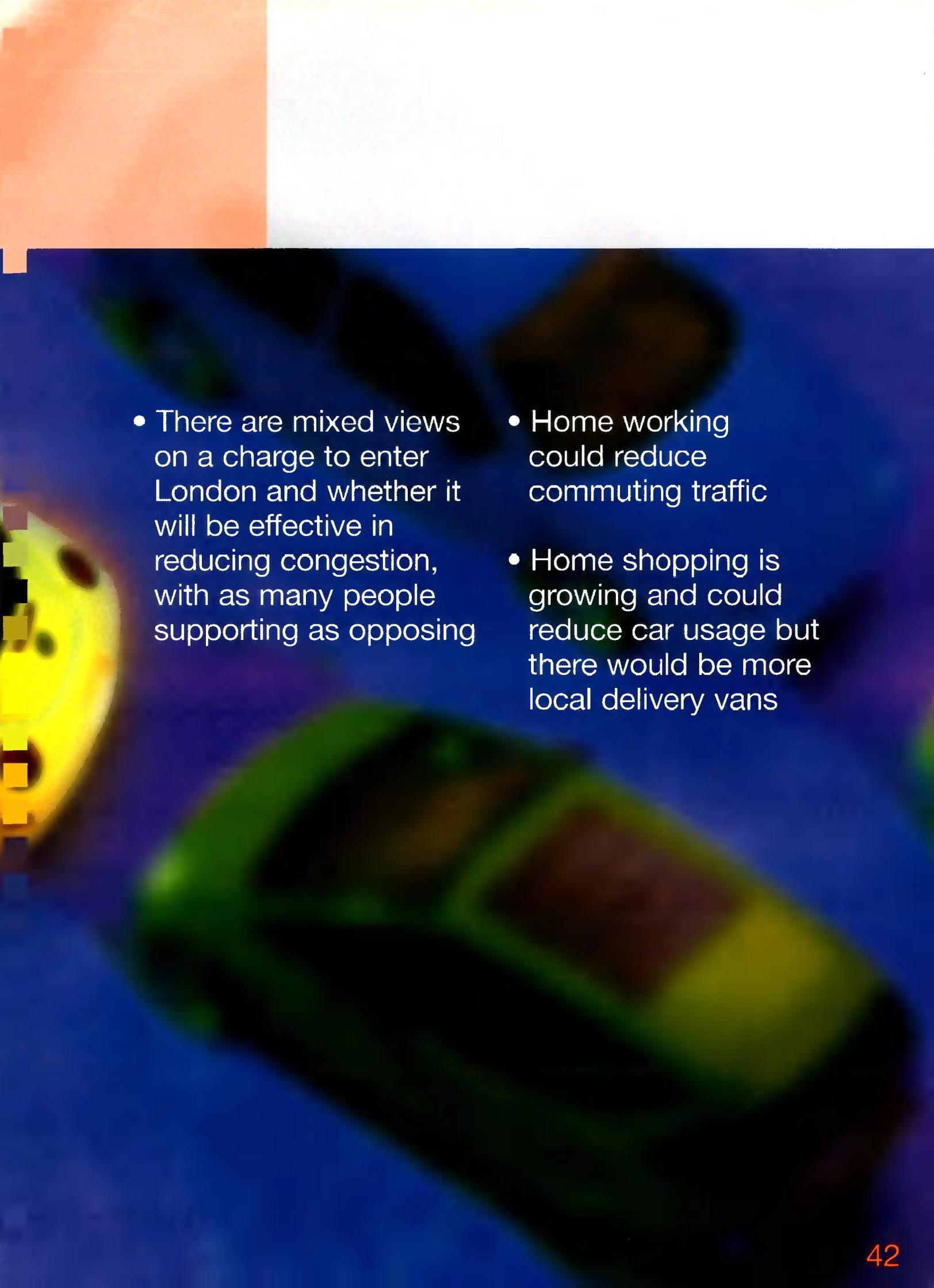
Base: All motorists making each journey
Source: RAC Report on Motoring 2002



Section 4

Going too slow – reacting to congestion

- 
- Drivers adapt to regular congestion and are unwilling to switch to public transport or give up the journey to avoid it
 - Half of all motorists now feel prepared to pay for a clearer route
 - Improved public transport is seen as the best solution to congestion rather than charging to enter towns
 - Drivers adjust to unexpected delays on their journey by choosing other routes

- 
- There are mixed views on a charge to enter London and whether it will be effective in reducing congestion, with as many people supporting as opposing
 - Home working could reduce commuting traffic
 - Home shopping is growing and could reduce car usage but there would be more local delivery vans

Section 4

Going too slow – reacting to congestion

Introduction

As the previous section shows, the perceptions of the general effects of congestion are often at odds with the reality of its personal impact. Similarly, in their responses to congestion, motorists clearly recognise that there are ways of influencing the choice between car use and alternative modes of transport, but are still unable or unwilling to implement them in reality.

This section of the report reviews how motorists react to congestion. It also looks at alternatives to the car, including cycling and walking, the specific problems of London traffic and the contribution home working and home shopping could make to reducing car usage.

Key research findings

Reacting to Congestion

- Congestion already affects 83% of motorists in some way – and the public expects it to get worse
- Two fifths (44%) of motorists allow for delays caused by congestion when they set out on most journeys of over 10 miles and only a quarter (29%) are confident enough to set off without making any provision at any time (down from 41% in 1997)
- Everyone adapts to regular congestion – more than a quarter (29%) of motorists simply put up with it
- Drivers also adjust to unexpected delays on their journeys by leaving more time (24%) and choosing other routes (22%)
- Home shopping is growing and could reduce car usage, but would put more local delivery vans on the roads
- There is a polarised view on the proposed £5 charge to enter London with 42% supporting it and 43% opposing
- Almost half of Londoners (49%) think charging is a good way to reduce congestion, while 41% do not
- 45% of Londoners think that the proposed charge is too high, 50% about right, and only 5% think it too low
- If the scheme does not succeed in reducing congestion, half of London motorists think the charges will be raised further but a third think the scheme will be abandoned

Solutions to Congestion

- Motorists are unwilling to switch to public transport or give up a journey to avoid congestion
- When asked how they overcome it only 2% mentioned using public transport, only one in ten used 'an alternative to their car' and only one in five felt that they 'could' use a bus or train more
- Improved public transport is perceived as one solution to congestion (41%) although a higher proportion prefer improvements to the road network (49%)
- Around half of motorists suggest that they are prepared to pay to save 20 minutes on a 2 hour journey or 10 minutes on a 30 minute commute
- Walking and cycling are not seen as possible solutions for most motorists and are unlikely to make much impact on congestion
- 12% of motorists see home working as an alternative to commuting, a potential addition to the 8% who already work from home



"I need my car for work so sometimes congestion is unavoidable."

4.1 Overcoming congestion

Drivers are now accepting the reality that congestion is a way of life. Thus a third of them say they do not try to overcome it but just put up with the resulting delay.

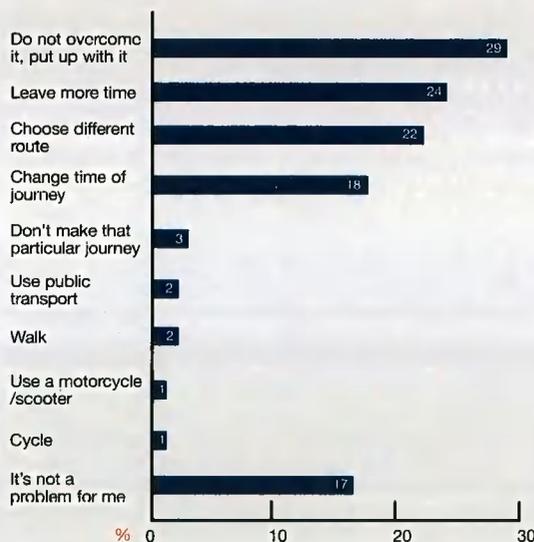
"I avoid congestion by getting up early."

Others adjust by leaving more time for journeys or by changing their route or departure time.

This accords with the expansion of the rush hour which in many places now lasts two or three hours each morning and evening. In London the perception is that there is no rush hour any more – the traffic is continuously bad. This may explain why only a third of motorists say congestion is a serious problem for them personally (figure 3.24). Only one in thirty avoid it by giving up the journey, one in fifty switch to public transport and one in fifty walk instead.

Figure 4.11
Overcoming congestion – personally

"How do you personally overcome congestion?"



Base: All motorists
Source: RAC Report on Motoring 2002

"I go out at different times – not at the peak."

"I use different routes, country side roads instead of main roads."

"I drive at night to avoid problems on motorways."

"I use smaller roads, less busy routes."

Figure 4.12
Impact of congestion on car use

"How many times in the last month have you decided not to make a journey in your car because of congestion?"

	Millions of motorists*
Did not use car because of congestion	5.9
Of which:	
Gave up journey altogether	2.5
Or switched to:	
Train/tube	1.2
Buses	0.9
Walked	0.6
Bike/motorbike	0.5

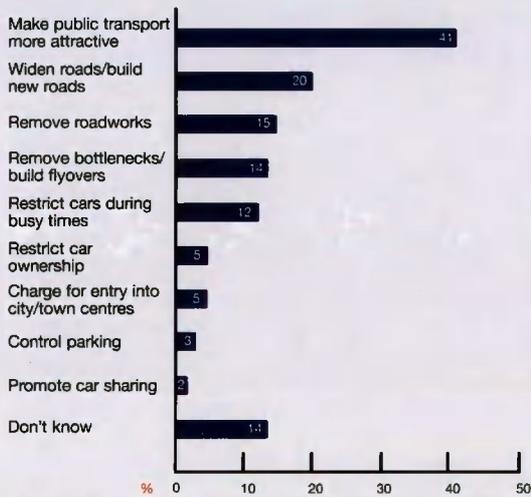
Base: All motorists
Source: RAC Report on Motoring 2002
*Figures rounded

Although only 6% of drivers say that generally they use alternatives to their car to overcome congestion, nearly one in four drivers say that they have decided not to use their car for one or more journeys in the past month because of congestion. In real terms this amounts to nearly 6 million motorists abandoning 12 million journeys a month, or about 0.7% of all car journeys (based on 700 journeys a year¹⁴). While this is only a small fraction, it is well known that a small change in traffic can make a substantial difference to congestion. Rural drivers are less likely to meet congestion but where they know they might be affected, for example by going into a local town that could be crowded, some will give up the journey altogether because there is no alternative public transport.



Figure 4.13
Reducing congestion

“What is the best solution to reducing congestion?”



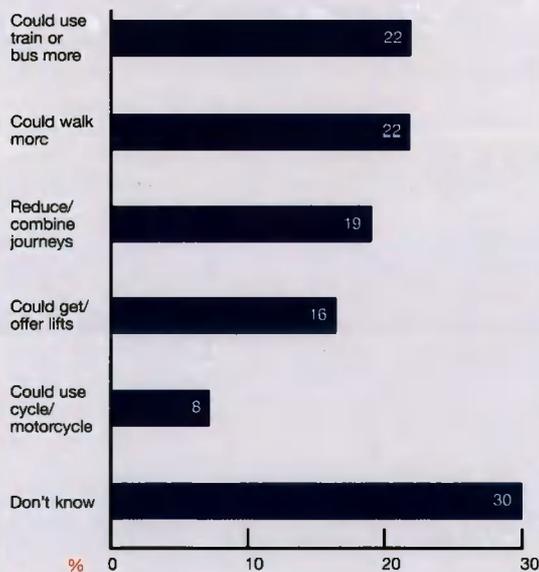
Base: All motorists
Source: RAC Report on Motoring 2002

Motorists believe that improving public transport is the best solution for reducing congestion (41%), although many also mention widening or improving roads by building flyovers or removing bottlenecks (49% in total). Eliminating roadworks is also seen as a possible solution. Although restricting car use or charging were not considered effective, there was greater support among those who lived in city centres and among company car drivers. Those in Scotland were least in favour of better public transport and wanted more roads. Motorists who lived in Wales and the south west of England wanted better public transport but were not so concerned about road works.

When facing the reality of giving up car journeys, the gap between heart and mind is at its greatest. A third of motorists were unable to identify any way in which they could make a personal contribution to reducing congestion by changing the way they used their cars. Most others identified some way they could help, such as making occasional or more frequent journeys by public transport, walking, cutting out or combining journeys or giving lifts, but the reality remains that most motorists will simply find different car-based solutions to overcome the congestion problem (figure 4.11) rather than seek an alternative. Those who admitted that congestion was a problem either locally or for them personally were more willing to travel by alternative modes or consider offering lifts.

Figure 4.14
Personal contribution to reducing congestion

“How could you personally change the way you use your car to reduce congestion?”



Base: All motorists
Source: RAC Report on Motoring 2002

“I don't use my car much. I would use regular bus service if it was available in my area.”

“Congestion could be avoided if people worked staggered hours.”

“I could share my car on short journeys.”

“I do give others lifts.”

“I couldn't use my car less – I use it when I need to.”

“To reduce car use people should not do a single journey locally but do lots of things together.”

“To not go out at busy times is the best way to avoid congestion.”



"I would never use alternative transport, I love my car too much."

"No way could I use my car less – I need the car."

"I've never given up my car because of congestion. I use my car when I need to."

The previous figures (figures 4.13 and 4.14) describe general solutions to congestion such as improving public transport and broad changes in motoring behaviour. However, a better understanding of the use of the car by motorists comes from looking at individual journeys for specific purposes, to see whether drivers will give some of these up altogether or switch them to public transport.

Drivers are more prepared to give up one journey a week altogether than switch to public transport. Two fifths (41%) of drivers could not or would not identify a journey which they would be prepared to switch from car to public transport. 29% could not identify a journey they would give up altogether.

The most popular journey to give up is shopping – presumably not the main grocery shop but perhaps speculative "window" shopping or purchasing lighter items such as clothes. Some people would give the journey up altogether; others would switch to public transport. The ironic reality is that shopping rarely causes congestion, except at peak times. (See section 4.6 on home shopping).

Commuting is a major cause of congestion and one in six drivers in work could give up their commuting journey by car and seem to be willing to switch to public transport. As around 16 million people commute to work by car, this would be equivalent to 2.5 million drivers giving up their cars in favour of public transport. This would put a significant strain on public transport which at present accommodates around 4 million commuters (15%). Thus the demand for public transport could rise by more than a half.

One in five of those with children would consider giving up the school run by car. To have an effect on congestion they would have to get their children to walk or use car sharing, as they do not think they can switch the school run to public transport.

One specific group of children who could become less dependent on the car for a lift to school is teenagers. Over the past three years they have been walking to school less and becoming more dependent on a lift. Yet those teenagers who do get a lift to school acknowledge that they could realistically walk, go by bus or cycle if they did not travel by car. There has also been a switch from school buses and an increase in use of public buses, possibly because local authorities may have cut back on school bus services.

Figure 4.15
Giving up a journey and switching to public transport

"If you had to give up one journey a week in your car altogether which would it be?"

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

%	Give up car	Switch to public transport
Shopping	27	17
School run (% of those with children)	19	4
Journey to work (% of those in work)	17	18
Social (visit to friends/ leisure facilities)	15	11
Into town/city centre	6	13
None	19	28
Could not specify journey	10	13

Base: All motorists
Source: RAC Report on Motoring 2002

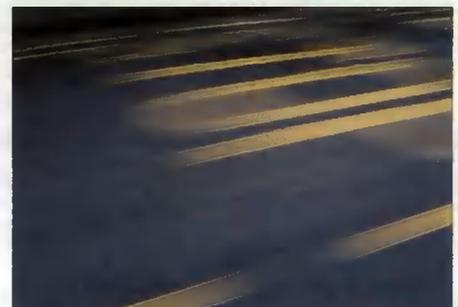
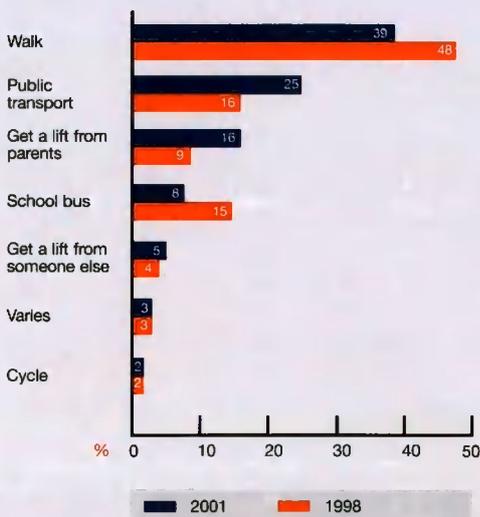


Figure 4.16
Going to school – teenagers

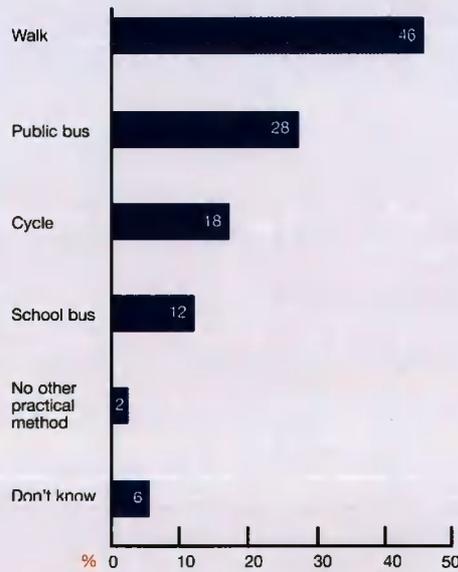
“How do you get to school in the morning?”



Base: All teenagers
Source: RAC Report on Motoring 2002

Figure 4.17
Alternative ways of getting to school – teenagers

“How would you get to school if you could not get a lift?”



Base: All teenagers who get lift to school
Source: RAC Report on Motoring 2002

“I could walk to school as we are near, traffic is horrendous, there is no parking at school and it would save time.”

“I walk to school to avoid congestion.”

Comment from Steve Stradling, Professor of Transport Psychology, Napier University, Edinburgh

Cutting car use requires some combination of eliminating trips, using alternative modes, or switching to alternative – closer – destinations. But transport joins up the places where people lead their lives so reducing car use requires that people make changes to their patterns of life. And then sustain those changes.

The flexibility of motorists in adapting to congestion reveals a snapshot of a self-correcting system already busily in action. Drivers are switching modes and abandoning journeys. Inverting the figures of figure 4.15 finds over half (59%) who could identify a journey they could switch from car to public transport and almost three-quarters (71%) who could identify a journey they would give up altogether. The perception of congestion, especially in London and in other town centres, will already be causing trip, mode and destination avoidance. This will have economic consequences both for travellers and for those locations perceived as congested.



4.2 Unexpected congestion

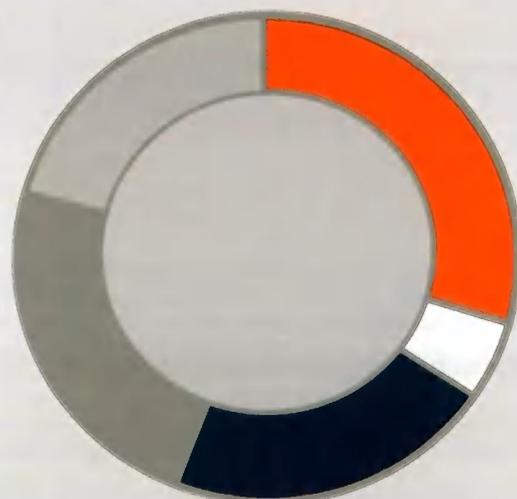
Two fifths (44%) of motorists allow for delays caused by congestion when they set out on most journeys of over 10 miles; only a quarter (29%) are confident enough to set off without making any provision at any time. In 1997 the equivalent figures were 38% and 41%, showing a greater awareness of the realities of unexpected congestion today. Company car drivers check for delays more often because the hold-ups are more important to them. Those who often experience unexpected congestion are much more likely to allow for delays before they leave (76%), as are those who drive more than 15,000 miles a year (59%). Londoners check more frequently because of the greater risk of congestion.

"I avoid peak hours and plan my route to avoid congested areas."

"I just avoid busy areas and peak times."

Figure 4.21
Planning for congestion

"Thinking of a journey of 10 miles or more which you do regularly, how often, before you set out, do you allow for delays caused by traffic congestion?"



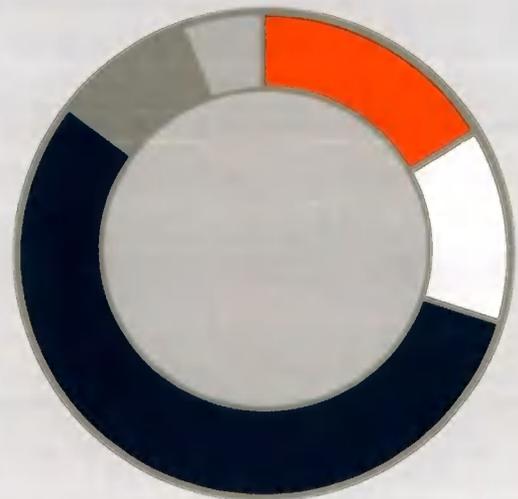
20% Every time
8% Roughly half the time
24% Most times
29% Never
19% A few times

Base: All motorists doing trip
Source: RAC Report on Motoring 2002

While few people perceive unexpected delays as "congestion", it is clearly a significant problem because five in every six drivers sometimes experience unexpected delays on a representative medium length journey. More than a quarter of motorists expect the unexpected at least half of the times they make such a trip.

Figure 4.22
Unexpected congestion

"How often on this journey do you encounter traffic congestion you are not expecting?"

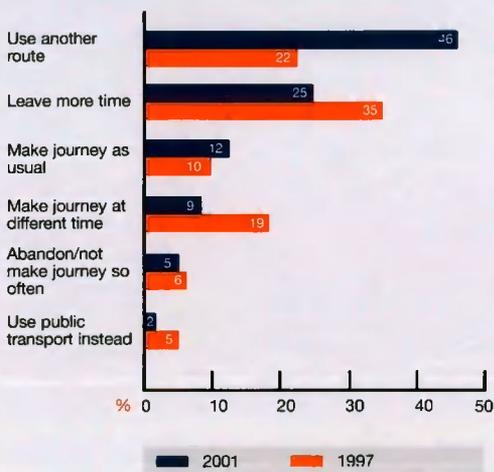


5% Every time
11% Most times
55% A few times
13% Roughly half the time
16% Never

Base: All motorists doing trip
Source: RAC Report on Motoring 2002

Figure 4.23
Response to unexpected congestion

"If the likelihood of encountering unexpected congestion were to double, what would you do?"



Base: All motorists
Source: RAC Report on Motoring 2002

If the chance of unexpected congestion on this typical journey were to double, motorists believe they would still not give up the car – only 7% said they would use public transport or give up the journey altogether. Instead, most motorists would use another route, emphasising the importance of checking the status of the route in advance. They would also leave more time. It is interesting to note that since 1997 motorists seem to be more prepared to use an alternative route whereas previously they would have left more time, possibly because unexpected congestion is now becoming a more frequent reality and leaving more time is no longer effective. Those who already use alternative routes to avoid congestion would be even more likely to do so if congestion doubled.

Less than half of all motorists (39%) check road conditions before leaving on a long journey and less than one in ten (8%) before their regular journey to work, suggesting either a great deal of confidence or an acceptance of the inevitable. The radio is the most often used source of traffic information, followed by teletext and TV bulletins (especially breakfast TV). Electronic services such as Trafficmaster, the Internet and mobile phones are not nearly so popular before leaving home, although in reality, Trafficmaster and mobile phone services are designed to come into their own on the journey itself. Company car drivers check traffic information more often for both long journeys and commuting as do those who frequently experience unexpected delays on long journeys.



"I heard about congestion on the radio and turned round and went home."





One option to improve the traffic flow is to create toll roads where motorists would pay to use a road which was less crowded. While paying for motorways is well established in Europe, the first such scheme in Britain will only become operational in 2004 when the new Birmingham northern relief road (to be called the "M6 Toll") will run in parallel with the existing toll-free M6 motorway. Paying for time saving is now on the motorists' agenda of travel realities for the future, with around half of drivers suggesting that they would be prepared to pay to save 20 minutes on a 2 hour journey or 10 minutes on a 30 minute commute. These motorists would be willing to spend on average £1.50 to save 20 minutes (the equivalent of £4.50 per hour saved) or £1.10 to save 10 minutes on their journey to work (£6.60 per hour). However, those who see congestion as a serious problem are not willing to pay more to find a solution.

"I would be happy to pay if I was guaranteed to get there at the right time!"

Figure 4.25
Paying to speed the journey

"Suppose there was a new fast road which you pay to use. How much would you be prepared to pay to save 20 minutes on a 2 hour journey/10 minutes on a 30 minute journey to work?"

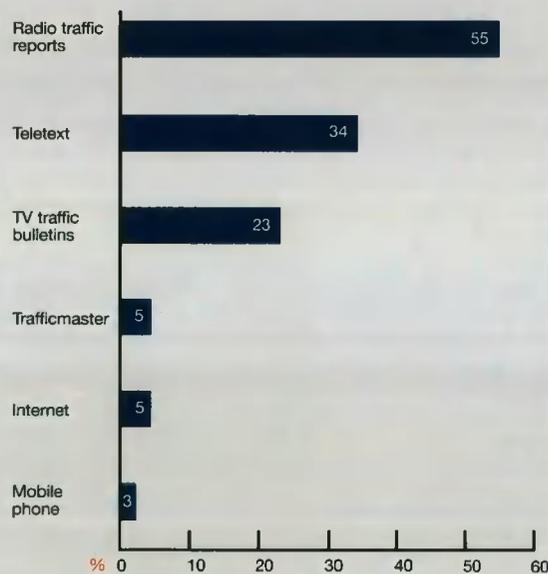
%	Long journey	Journey to work*
Nothing	45	59
Less than £1	30	31
£1-£2	13	5
£2-£5	8	2
Over £5	2	1
Average (of those prepared to pay something)	£1.50	£1.10

Base: All motorists
Source: RAC Report on Motoring 2002

* Those working full time

Figure 4.24
Checking road conditions

"If you are making a journey by car, how do you normally check the road conditions?"



Base: All motorists who check
Source: RAC Report on Motoring 2002

The Commission for Integrated Transport public attitude research shows that 68% of the public expect congestion to get worse, 18% for it to remain the same and 12% expect it to get better. The DTLR research is even more concerning as 85% say they expect it to get worse and only 6% for it to improve – while a third of people think that a lot can be done to improve it, the same proportion say a little can be done.



4.3 Walking and cycling as an alternative

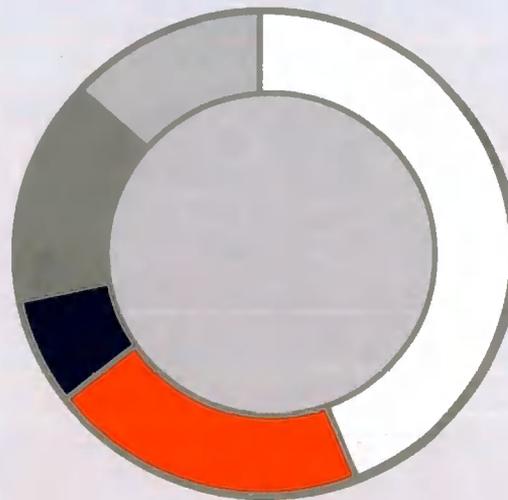
Figure 4.14 shows that motorists could walk or cycle to reduce congestion instead of using their car. 22% say they could walk more and 4% say they could cycle; a further 4% could use a motorcycle more than they do currently. Once again though, figure 4.11 shows just how few motorists actually choose these alternatives.

Half of male and two thirds of female motorists say they often use their cars for short journeys, which they could walk within 10 minutes. Journeys involving heavy shopping were specifically excluded from the question for practical reasons. Typically drivers made three "walkable" journeys by car each week compared with around 13 car journeys a week in total. Older people and those who live in suburban areas were less likely to use their car for "walkable" journeys because there is less opportunity, while those with children in the household were more likely to. The actual effect on congestion of such short journeys depends on where they are made and at what time of day. Avoiding school runs could make a significant difference in a local area. There are distinct health advantages from the exercise of walking and not doing short journeys by car reduces local air pollution appreciably because exhaust emissions are at their highest when the car engine is cold.



Figure 4.31
Walking as an alternative

"How many times a week do you make a short journey by car which you could walk within 10 minutes each way (excluding carrying heavy shopping)?"



12% Once
15% Twice
7% Three times
21% More than three times a week
45% None

Base: All motorists
Source: RAC Report on Motoring 2002

"I walk locally if I can."

"Walking to the shops would cut down car use."

"I sometimes walk to work if it's a nice day, because it's not too far."

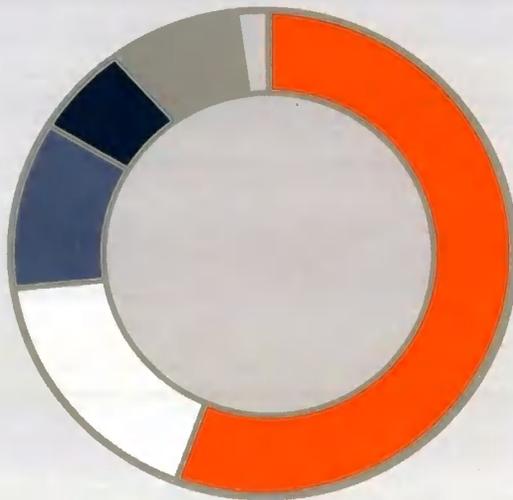
There are over 20 million bicycles in Britain and the number is rising. Demand for new bicycles is strong with 2.3 million a year sold – more than the number of cars in Britain – although many will be for children. Over half of all households have a cycle¹⁵, compared with four out of ten motoring households but a third of these cycles never get used. The rest get used about once a week on average. National Travel Survey figures show those in households with bicycles on average make about 30 cycle journeys a year.



There does appear to be an opportunity to increase cycling. If cycling were perceived to be safer with more cycle lanes, then a half of existing cyclists would use their bicycle more, a quarter of those with dormant cycles would start to use them and even 11% of those without cycles might be persuaded to start cycling.

Figure 4.32
Cycling as an alternative

“How often, if at all, do you ride a bicycle nowadays?”



1% Every/most days 12% Less than 1/month
 7% 1-3 times a week 17% Never (but own a bicycle)
 5% 1/week to 1/month 58% Don't own a bicycle

Base: All motorists
 Source: RAC Report on Motoring 2002

Figure 4.33
Improving cycling

“Would you cycle (more) if it were safer and there were more cycle lanes?”

%	Those who use bicycle	Those who do not use bicycle	Those with no bicycle
A lot more	24	9	3
A little more	22	18	8
No change	52	71	75
Don't know	2	2	14

Base: All motorists
 Source: RAC Report on Motoring 2002

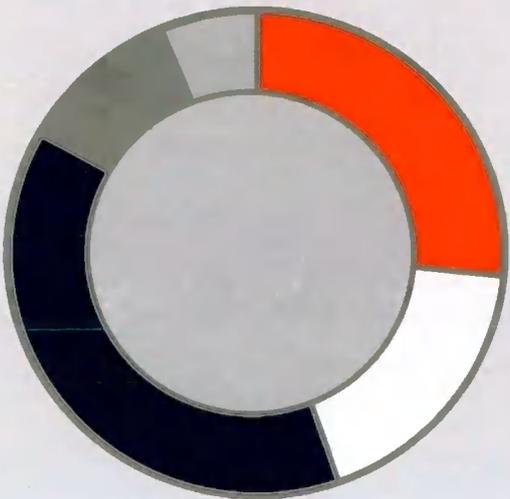
4.4 Congestion in London

This section is based on a sample of 320 regular motorists who live in Greater London.

More than a third of Londoners never drive into central London and a quarter do so less than once a month. Only 10% do so several times a week, which is consistent with the government's Labour Force Survey¹⁶ which shows that only 13% of those who commute into central London use their car while 69% use trains or tubes. Nationally 85% of commuters travelling by road (that is not using trains or walking) use a car but in London it is only just over half, the rest using buses or coaches.

Figure 4.41
Frequency of driving into London

"How often do you drive into the centre of London?"



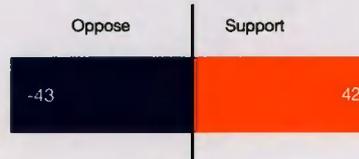
6% Every/most days 26% Less than 1/month
 10% 1-3 times a week 39% Never
 19% 1/week-1/month

Base: All Londoners
 Source: RAC Report on Motoring 2002

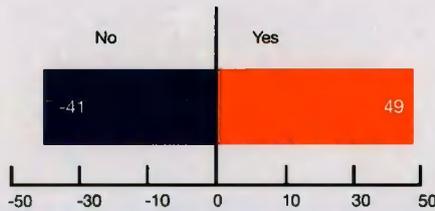
There is a polarised view on the proposed £5 charge to enter London with 42% supporting it and 43% opposing. Half of Londoners (49%) think it is a good way to reduce congestion but almost as many (41%) disagree.

Figure 4.42
Londoners' views on charging to enter London

"The Mayor of London is proposing a £5 charge to drive into the centre of London, do you support or oppose this charge?"



"Do you think this is a good way to reduce congestion in the centre of London?"



Base: All Londoners
 Source: RAC Report on Motoring 2002

Londoners would like to see the money raised through charging go into improving public transport and lowering fares, although improving road maintenance is also important. Other uses for the money (which received very little support) were lowering car tax, paying for the National Health Service and building new roads.

"On principle – I do not agree with that anti-motoring measure."

"It's a good idea. It might make me use my car less."

"It just makes it so difficult if you have to carry all your shopping around and on a bus or train."

"It would be extremely annoying. It wouldn't bother people who are better off, but poorer people who need to make specific journeys, it would penalise against them."



"Try to find an alternative route but if not, I would pay it. I wouldn't be happy but would pay it."

"Some people could afford it but others could not, and shops would lose business."

"It would eventually get paid – too convenient to use car."

"I'd try to avoid the area but I think it is very unfair as taxes are high enough already."

"I'd find an alternative route or shops. Charges and time are important for me."

Figure 4.43
Use of the £5 charge

"What do you think the money raised from the £5 charge should be spent on?"

%	All
Providing more frequent/reliable public transport	52
Improving road maintenance	16
Providing cheaper public transport	8

Base: All Londoners
Source: RAC Report on Motoring 2002

Figure 4.44
Level of charge

"Do you think that the £5 charge is too high, too low or about right?"



1% Much too low 16% A bit too high
4% A bit low 29% Much too high
50% About right

Base: All Londoners
Source: RAC Report on Motoring 2002

The £5 charge is seen as about right by over half of London motorists but a substantial number (45%) think it is too high. Only a very small proportion (5%) thinks it is too low.

In response to the charge, three fifths of those who drive into London would pay the charge or recharge it to their employer, a quarter would use public transport and the rest would give up the journey, park outside the charging zone or share their journey. If the scheme does not succeed in reducing congestion, half of London motorists think the charges will be raised further and a third think the scheme will be abandoned.

Figure 4.45
Action in response to charge

"What will you do when the London charge is introduced?"

	%
I will pay the charge personally	47
I will use public transport instead of my car	26
I will recharge the charge to my employer/business	12
I will no longer drive into the centre of London	11
I will share the journey with someone else	2

Base: All Londoners who drive into London
Source: RAC Report on Motoring 2002

Londoners see the tube as the best way of getting around London, but the realities of using this mode of travel are not encouraging as they believe it is dangerously crowded and getting worse. Buses are also poorly perceived with Londoners saying they are unreliable and crowded. Improving bus reliability is one of the key parts of London's transport strategy and for reinvesting the congestion charge.

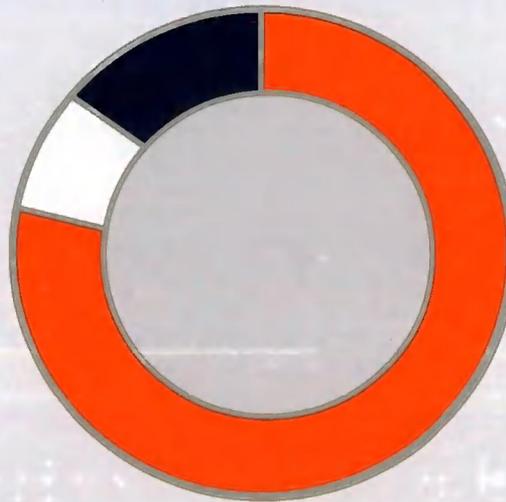
4.5 Working from home

One way of reducing traffic would be for more people to work from home. At present 8% of motorists in work use their home as a base while a further 12% say they could work from home given a telephone and a computer. The government has a policy of making e-working and e-business easier which should encourage that switch.

Even though they may be able to work from home, in reality many people said they could only do it for a few days each week. Those who currently work from home do not limit themselves to a five day week, with a fifth of them working six or seven days a week.

Figure 4.51
Ability to work from home

"If you had a telephone and computer at home, could you work from home for some or all of the time, rather than your normal place of work?"



12% Yes could 80% No
8% Yes do

Base: All motorists in work
Source: RAC Report on Motoring 2002

"I would go to another town if it didn't have a charge. I would avoid entering the busy town with fees and go elsewhere. If there was no alternative, I would have to grin and bear it."

"I would not visit that area because it would become too expensive."



"I would use my car less if I could work from home."

Many workers cannot work from home for practical reasons because they work in a factory, shop or school with others and need to be at work to meet colleagues or customers. Only a small number said that company culture or policy prevented them from working from home.

Those who already work from home save around 200 million car commuting journeys a year (5%). Even if motorists who say they could work from home only did so for two days a week, there would be a further 3% reduction in commuting traffic. In reality, a drop in traffic volumes of just a few percentage points would have a significant impact on local and regional congestion.

The RAC Foundation Report on Motors and Modems¹⁷, updated in 2000, suggests that over a five year period teleworking could reduce commuting traffic by 10% (although it is possible home workers may instead use their car for other journeys during the day). The report estimates that reduced car business travel because of teleconferencing could contribute another 4-5%. A 1999 trial in Hampshire by the Transport Research Laboratory showed that the average teleworking duration was one and a half days a week resulting in a saving of 11-21% in fuel usage¹⁸.

Figure 4.52
Frequency of working from home

"How many days a week could/do you work from home?"

	Could work from home (%)	Do work from home (%)
Days a week		
1	13	18
2	34	17
3 or 4	22	9
5	20	35
6 or 7	11	22
Total number of drivers	1.9 million	1.3 million

Base: All who could or do work from home
Source: RAC Report on Motoring 2002

"I can plan my journey times as I am self employed."

Figure 4.53
Reasons for not working from home

"Why could you not work from home?"



Base: All who could not work from home
Source: RAC Report on Motoring 2002





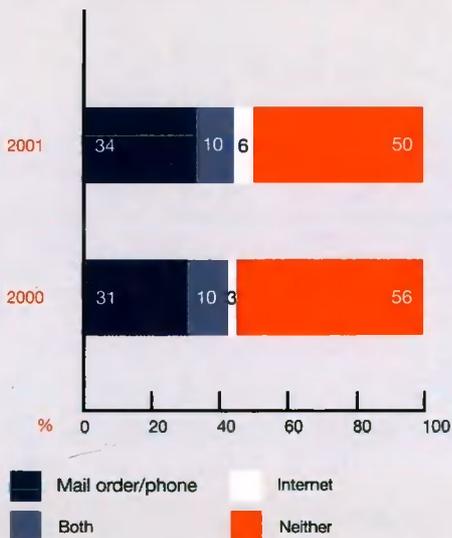
4.6 Home shopping

The use of both the internet and conventional mail/phone/fax for home shopping is increasing, with a half of all regular motorists now using one method or the other. Internet shopping has risen from 10% to 16% in the past year and mail order has also increased slightly. Men are slightly more likely to use the internet than women, who in turn are more likely to order by mail. Young people (under 34) are also more likely to use the internet (21%) but older people (over 55) are less likely to use either method of shopping in total.

The use of both methods of home shopping is set to increase, with 28% of internet shoppers and 8% of mail order buyers expecting to increase their use a lot more. There is little difference in expectation amongst the different demographic groups.

Figure 4.61
Home shopping

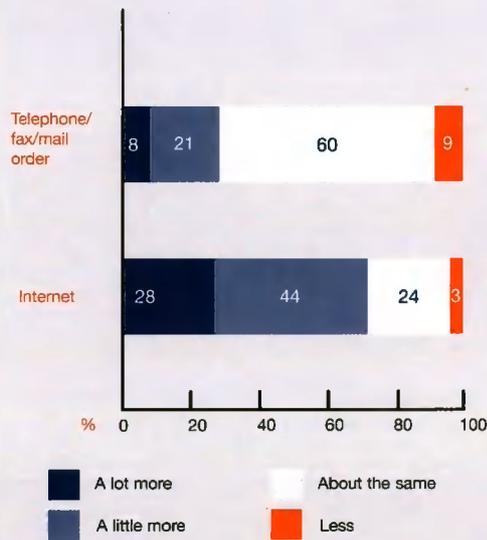
“Do you ever buy goods from home, either via the telephone/fax, mail order or over the Internet?”



Base: All motorists
Source: RAC Report on Motoring 2002

Figure 4.62
Future of home shopping

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



Base: All who have bought from home
Source: RAC Report on Motoring 2002

Clothes are the most popular item to buy from home, followed by books, CDs, toys and computer equipment. Books, CDs and computer equipment are more likely to be bought over the internet while mail order buyers focus on clothes (they were the original products of the large mail order companies). Both methods are equally popular for buying things for the house and toys. Only 7% of mail order shoppers buy groceries but this rises to 18% of internet buyers, showing the growth of the supermarkets' home delivery services.

“I can explore new ideas when I shop from home.”

“I just do television shopping – it's convenient and I can do it at any time of the day.”

“I prefer to go to the shops – it's cheaper and you can see what you're buying”

“I like to get out and get some exercise”

“I would love not to go to the shops – it would make me use my car less”

Home shopping is chosen because of “the hassle of shopping” and for convenience generally, but Internet shoppers also feel they get more information and lower prices. Even though they have a potentially wider choice of shops, city dwellers use home shopping to avoid the hassle of parking.

Figure 4.63
Nature of home shopping

“Which of the following items have you bought from home (by any method of ordering)?”

Top 12 mentions	%
Clothes	61
Books	44
CDs	37
Other items for house	26
Toys	24
Computer software/consumables	18
TV/Stereo/Hi-fi/Video/DVD	15
PC/Computer/Printer/Scanner/Cameras	15
Sports equipment	15
Plants for the garden	15
White goods	9
Groceries	8

Base: All who have bought from home
Source: RAC Report on Motoring 2002

“Good for buying books and getting information. The place for the future. For buying things for leisure activities.”

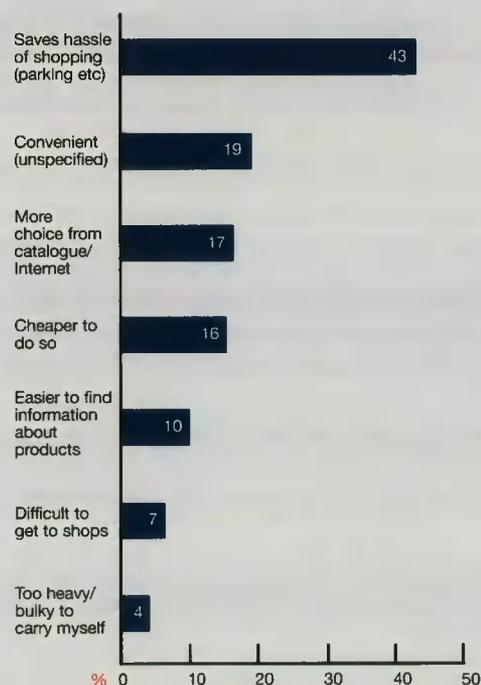
“It saves me some journeys and a lot of running about.”

“I don't have to queue in shops.”

One in five home shoppers say they now make fewer visits to shops; for Internet shoppers it is slightly higher. Generally, the added convenience also enables home shoppers to buy more. A few say it has made them buy less, possibly because they only buy what they need online, rather than succumbing to speculative shopping when they go to a real store.

Figure 4.64
Reasons for home shopping

“Why do you shop from home?”



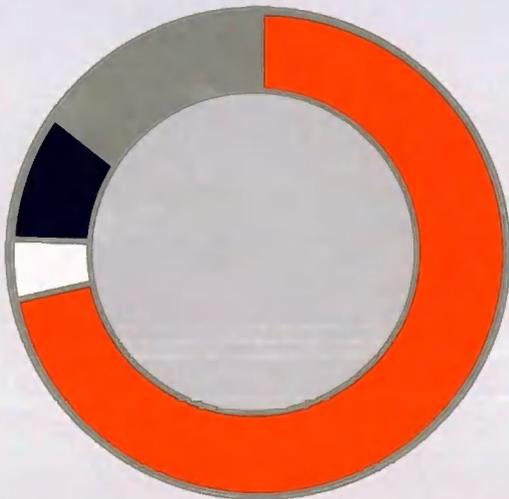
Base: All who have bought from home
Source: RAC Report on Motoring 2002





Figure 4.65
Changes in shopping patterns

“How has home shopping changed your shopping pattern?”



20% Make fewer visits 2% Buy less
6% Buy more 72% Not changed

Base: All who have bought from home
Source: RAC Report on Motoring 2002

However, home shoppers are no more likely than others to say they could give up a shopping journey to save using their car or switch to public transport (see figure 4.15), possibly because they have reduced their shopping journeys already.

“It could save cash as you spend more in the shops.”

“I like to impulse buy.”

“It’s nice to drive to the shops.”

One of the consequences of home shopping is more home deliveries, meaning more vans and lorries in residential streets outside working hours.

In the 2001 RAC Report on Motoring, a general question was asked about deliveries in "residential streets" and overall there was support for the idea, although a third of motorists neither opposed or approved. This year the question has been rephrased – forcing motorists to think about the reality of deliveries in "your road" and the opposition has increased so that there are as many who oppose as support more home deliveries. Those who currently shop from home are supportive of more home shopping, even if it means an increased number of vans and lorries – with 34% agreeing. For those who have not experienced home shopping, their perceptions lead them to an opposition of 29%.

"Ordering from a catalogue doesn't really change things – you still have to deliver the items by lorry."

Figure 4.66
Difficulty of home deliveries

"How difficult is it for vans and trucks to park in your road when making home deliveries?"



16%	Always difficult	17%	Occasionally difficult
23%	Sometimes difficult	44%	Never difficult (30% in cities and 51% in rural areas)

Base: All motorists
Source: RAC Report on Motoring 2002

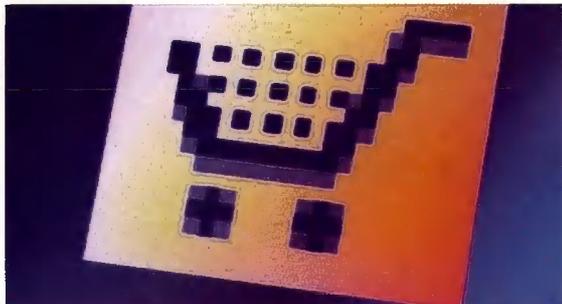


Figure 4.67.
Attitude to home deliveries

“If home shopping led to a rise in the number of vans and lorries delivering goods in your road, outside normal working hours, would you support or oppose the growth in home shopping?”



Base: All motorists
Source: RAC Report on Motoring 2002

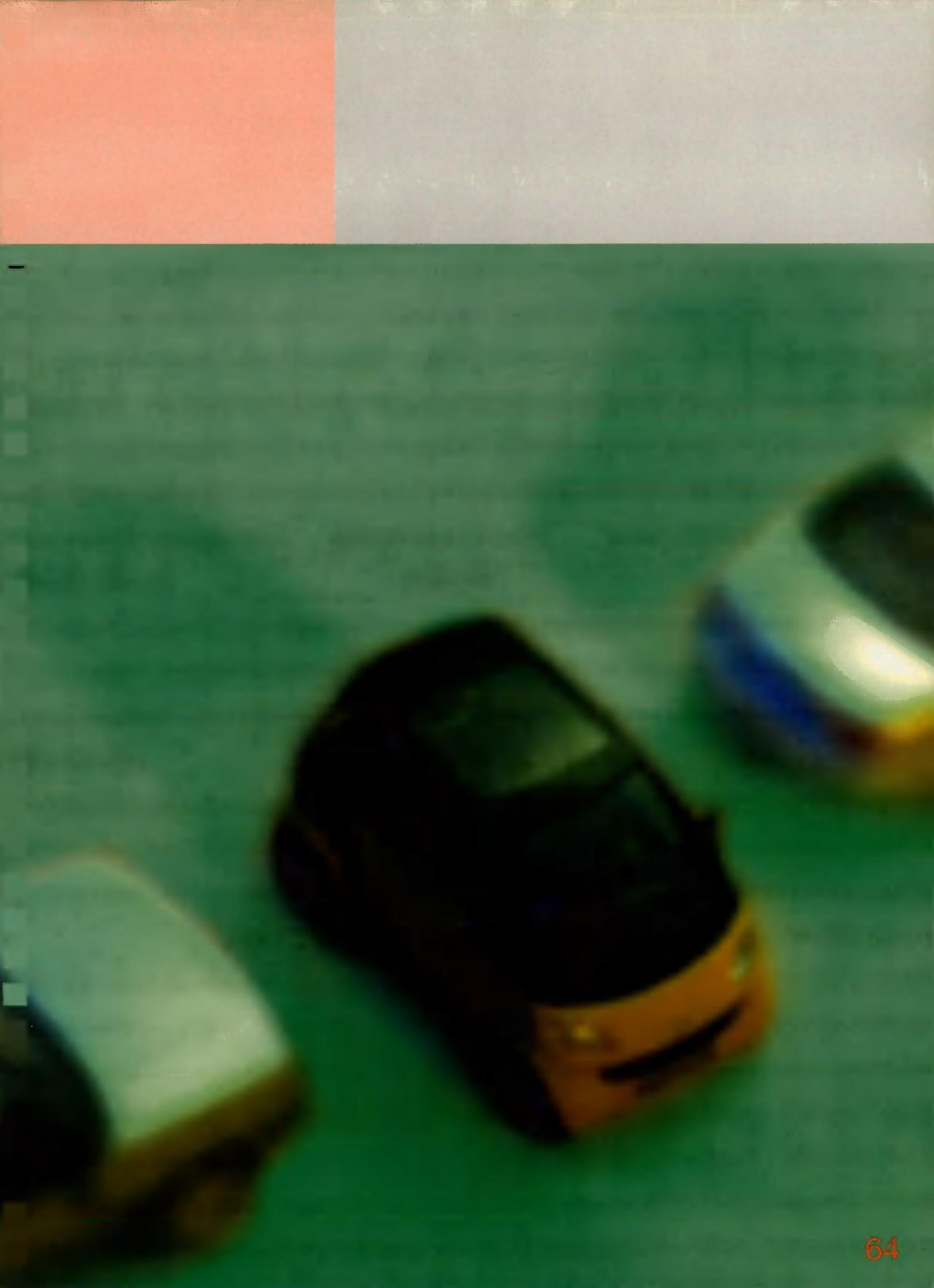


“My wife orders from catalogues but it doesn't change anything really, they still have to deliver the items putting more lorries on the roads.”

Section 5:

Living with the car

- Drivers understand the cost of fuel but underestimate the cost of running their car
- There is an incorrect perception that petrol prices have gone up
- Motorists' awareness of the new car tax regime is high
- Interest in alternative fuels is growing
- Local roads are perceived to be in a poor condition and getting worse
- Roadworks at night are deemed a good idea – but “not outside my home”
- Parking is becoming a greater problem



Section 5:

Living with the car

Introduction

There are many perceptions that motorists appear to have about cars and motoring which appear to be accepted without question – how much their car costs to run and the quality of the roads it runs on for example. Those perceptions, whether positive or negative, will often remain unchanged until interrupted by the reality of a mechanical breakdown or traffic-clogging road repairs. Motoring accounts for around 15% of the family budget¹⁹ but much of the real cost of owning a car is not visible in cash terms – namely the decline in value of the car through depreciation.

This section covers a number of aspects of everyday use of the car, running costs, the effect of changes in petrol prices, taxation, car registration plates, the conditions of the roads and parking.

Key research findings

- Drivers know their annual fuel costs but underestimate the cost of running their car, in particular the cost of depreciation
- 57% of drivers incorrectly believe that petrol prices have gone up this year. The reality is that the price of fuel has gone down
- 60% blame the government for the perceived changes to the price of fuel. In fact, the overall decrease over the past 12 months is largely attributable to lower crude oil prices
- Motorists' awareness of the new car tax regime is high at 80%. They are also beginning to react, with 36% suggesting that they have changed or will change their vehicle as a result of the new taxation
- Interest in alternative fuels is growing with one in five people suggesting that they would consider new options when buying their next vehicle
- Local roads are perceived to be in a poor condition – with 36% of motorists considering the roads in their local area 'bad or appalling' and 41% thinking they are getting worse
- Motorways are considered to be in a somewhat better condition than local roads, although 24% of motorists think they are getting worse
- The perceived deterioration has resulted in four in ten motorists either making, or wanting to make, a complaint
- Roadworks at night are deemed a good idea – but "not outside my home"
- Fewer people are parking in garages at night and parking is becoming a greater problem – 52% consider on-street parking a problem in their area



5.1 Cost of motoring

This section addresses the cost of motoring as perceived by motorists and compares it with real costs where they are known. Many drivers do not keep records of how much they spend, but will usually know that they put a given amount of petrol in their car every week. Perceptions are important – if drivers feel that car tax is a negligible contributor to the overall cost of running their car, changes will have less effect on their buying behaviour. The difficult issue for many people to assess is depreciation, which is not a tangible cash cost each month but only affects motorists when they have to change their car and make up the loss in its value to fund the replacement.

Drivers estimate they spend about £25 per week on petrol with all but 5% being able to give an estimate. Their confidence in estimating running costs is lower with 30% unable to give a figure. Company car drivers are less likely to know how much their car costs to fuel or run, generally because they do not normally pay the costs themselves.

Estimates of fuel costs of £25 per week (£1,300 per year) appear to be in line with actual figures and running cost tables²⁰. Taking the average of 10,300 miles per year, an average fuel consumption of 30mpg²¹ and a fuel cost of 78 pence per litre (£3.50 per gallon) during the summer of 2001, gives a cost of fuel of £23 per week. Company car drivers estimate they spend £48 per week, consistent with their 20,000 miles a year. Drivers with 1 litre cars spend £18 per week while those with 2 litre cars spend £30 per week, although they tend to do higher mileages too.

Figure 5.11
Cost of fuel and operating costs

“How much a year do you spend on tax, insurance, servicing and tyres, excluding depreciation or financing?”

“How much do you spend on petrol each week?”

	All	Company	Private
Operating costs			
Average (£/year)	£910	£980	£900
Don't know (%)	30%	45%	29%
Fuel			
Average (£/year)	£25	£48	£23
Don't know (%)	5%	10%	4%

Base: All motorists
Source: RAC Report on Motoring 2002

Drivers estimate their running costs (tax, insurance, servicing and tyres, but excluding depreciation or financing) to be around £900 per year on average, ranging from £800 for a small car to £1,200 for a large one. For smaller cars, these figures are broadly in line with those provided by fleet management consultants Emmerson Hill Associates (actual: £750) but motorists underestimate running costs for larger vehicles (actual: £1,700). This may be because drivers do not know how much they spend or because they do not have their cars serviced and repaired at the intervals assumed by the cost tables.

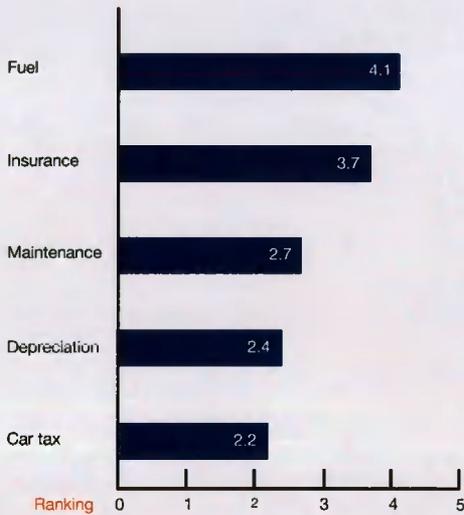
Drivers consider that fuel costs are the greatest expense, with depreciation the fourth most important and car tax at the bottom of the list. In reality, the ranking places depreciation at the top, followed by fuel, then maintenance and insurance. Thus the greatest change in running costs that has occurred in the past few years, namely the fall in used car prices by over 20%, has not been fully appreciated by the average motorist.



Figure 5.12
Cost of running a car

“Rank these expenditure items on your car.”

5 is main expenditure, 1 is least



Base: All motorists
Source: RAC Report on Motoring 2002

In October 2000, when the fieldwork for the 2001 RAC Report on Motoring was in progress, the widespread protests over high fuel prices had just finished. This year's research shows that more than half of drivers, perceive that petrol prices have risen since then; only 7% say it has fallen and a quarter say it has fluctuated. The government gets roundly blamed for the perceived change in prices, even though the fuel tax escalator was removed and some duties reduced. The reality is that fuel prices have fluctuated but generally moved downwards by about 10%. The main reason for the decline in prices has been lower crude oil prices, which have been passed on to the consumer.

Figure 5.13
Typical car running costs

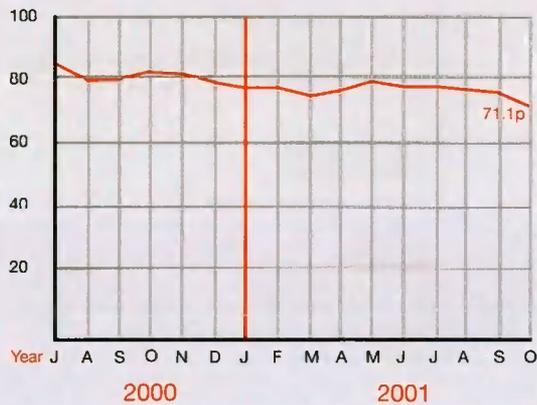
£ per annum	Engine size cc			
	1100	1100-1500	1500-2000	2000+
Fuel	900	1,000	1,150	1,600
Insurance	300	400	600	900
Maintenance	350	450	550	650
Depreciation	1,000	1,600	2,000	3,500
Car tax	100	100	150	150

Source: Emmerson Hill running cost tables

Figure 5.14
Change in cost of petrol

Unleaded petrol including VAT and duty

Pence per litre



Source: Institute of Petroleum

Figure 5.15
Awareness of change in cost of petrol

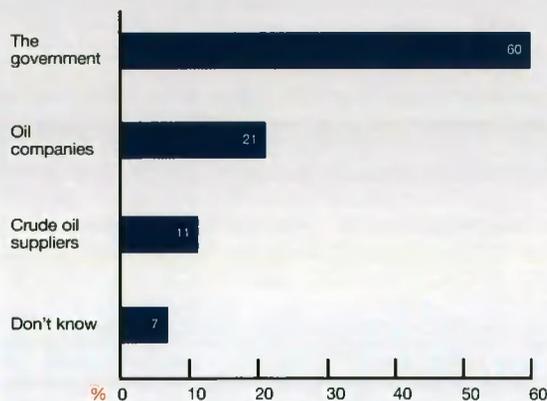
“How have petrol prices changed in the past year?”

	%
Gone up a lot	33
Gone up a little	24
Gone down a little	6
Gone down a lot	1
Fluctuated	25
No change	8
Don't know	3

Base: All motorists
Source: RAC Report on Motoring

Figure 5.16
Blame for change in fuel prices

“Who has been the main cause of the change in petrol prices?”



Base: All motorists aware of change in petrol prices
Source: RAC Report on Motoring 2002

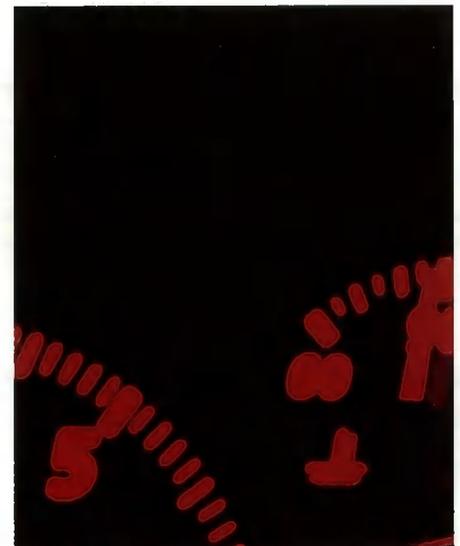
Despite this perceived increase in petrol prices, most drivers (72%) say they have not changed their driving behaviour. Those who have reacted have tried to drive more economically, do fewer miles or look around for cheaper petrol. Only one in fifty say they have switched to a smaller car (see also section 5.2 on taxation).

Figure 5.17 Change in driving as a result of petrol prices

“How have you changed your driving as a result of the changes in fuel prices?”

	%
No change	72
Try to drive more economically	10
Do less miles	7
Look around for cheaper fuel	6
Now buy fuel at supermarket filling station	5
Switched to smaller more fuel efficient car	2

Base: All motorists aware of change in petrol prices
Source: RAC Report on Motoring





Section 5.2 Changes in car taxation

Even though car tax (vehicle excise duty or VED) represents only 4% to 6% of the cash cost of running a car (excluding depreciation), the government has seen it as an important way of influencing purchasing behaviour. The VED for cars up to 1600cc has been reduced from £155 to £105 per year. Drivers are very aware of this change.

Figure 5.21
Changes in car taxation

"Are you aware of any changes in the taxation of cars (road fund licence/car tax)?"

"If so what changes are you aware of?"

	2001	2000
%		
Aware of change	80	62
What changes?		
Lower rate for small cars	92	87
Switch to CO ₂ base	17	9

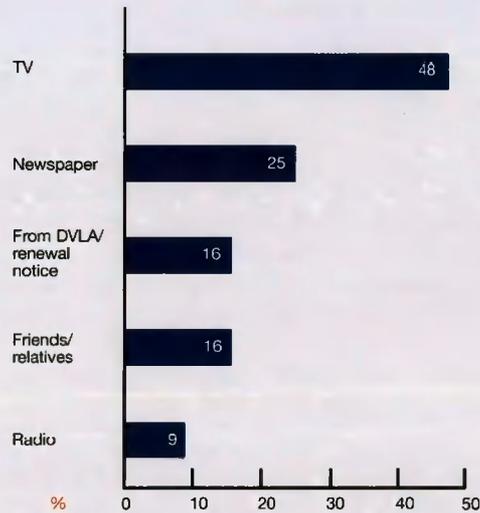
Base: All motorists. All who are aware of change in taxation
Source: RAC Report on Motoring 2002

Motorists are less familiar with the change for new cars where the rate is now based on CO₂ emissions, but awareness has still increased over the past year – in particular that there are savings to be made for driving a smaller car.

Drivers found out about the changes largely from media publicity, followed by their renewal notice and friends or relatives. Company car drivers also heard from their employers.

Figure 5.22
Finding out about the changes

"How did you find out about the change?"



Base: All motorists
Source: RAC Report on Motoring 2002

Despite the relatively low impact on total running costs, drivers do seem to be reacting to this change in road tax. About 0.7 million drivers claim to have switched to a smaller car as a result – this represents about a tenth of new and used car buyers over the past year.

"I purchased a smaller car for a reduction in tax and to save petrol."

"I'm retired so I bought a smaller car – it also helps with the emissions."

"That's why I bought my new car."

"It would definitely be a reason for buying a smaller car."





More drivers expect to switch in the future as a result of the change.

Those who do not plan to change say it is because they do not expect to change their car for some time, have not thought about it or need the current size of the car for their family. Only two in ten say they do not care about costs or the environment (three in ten for company car drivers).

The change in road tax may have been one of the factors that have stimulated slightly more drivers to consider alternative fuels such as LPG, CNG or petrol/electric hybrids over the next three years. Two million motorists (7%) say they are very likely to do so. There has also been more publicity surrounding these alternatives as more manufacturers bring out such cars and that may also stimulate future demand.

"If I want to buy a nice big car, I'll buy a nice big car. There's no point in driving a matchbox."

"We like a more powerful car and we need a large car to fit all the family in."

"No, I like a bigger vehicle. We need it for the family and when we go camping, we need the power."

Figure 5.23
Response to changes in car taxation

"Have these changes made you/will they make you change the type/size of your car?"

	2001	2000
% of all motorists		
No change	70	79
Have changed	9	6
Will change	21	15
Action of those who have or will change		
Switched to smaller/more fuel efficient car	27	16
Switched fuel (mainly petrol to diesel)	3	5

Base: All who are aware of change in taxation
Source: RAC Report on Motoring 2002

Figure 5.24
Reasons for not changing

"Why have you not/will you not make any changes?"

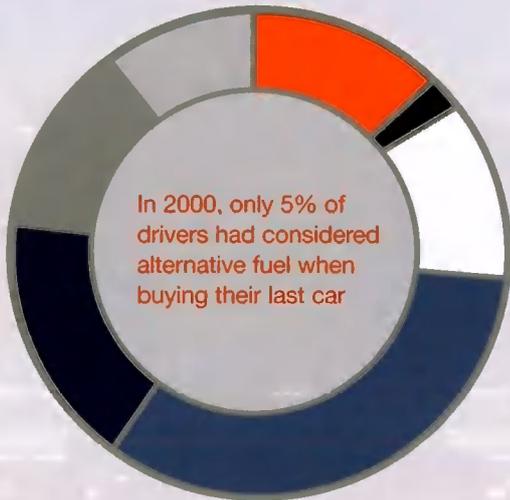


Base: All who have not or will not change
Source: RAC Report on Motoring 2002



Figure 5.25
Use of alternative fuels

“How likely are you to buy a car with alternative fuels such as LPG,CNG, bi-fuel or a petrol/electric hybrid over the next three years?”



7% Very likely
14% Quite likely
16% Quite unlikely
36% Very unlikely
12% Neither
1% Already have one
14% Don't know

Base: All motorists
Source: RAC Report on Motoring 2002

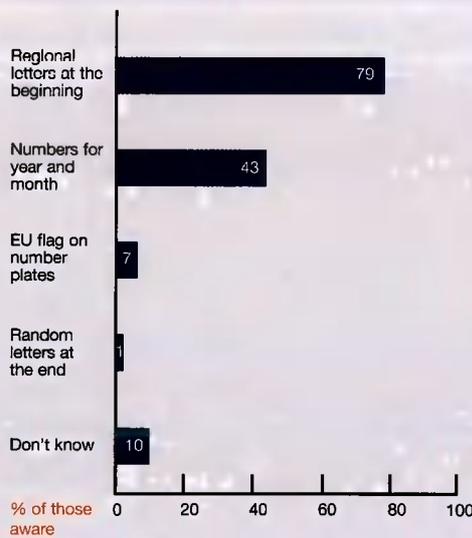
Another major change in car regulation over the past year has been the introduction in September 2001 of the new style registration plates.

These replaced the old age identifier of one letter at the beginning of the plate with a two digit numerical one and also introduced a regional identifier. Both of these are designed to make cars more recognisable. Regional identifiers are used in most of Europe and in the USA. Drivers are very aware of the change and most know about the regional identifier, although the age identifier is less familiar.

Figure 5.26
Changes in car number plates

“Are you aware of any changes in car number plates? If so, what changes are you aware of?”

89% awareness, of which



Base: All motorists
Source: RAC Report on Motoring 2002



5.3 Road conditions

The perceived condition of local roads in terms of maintenance and potholes is generally rated "fairly good", with city dwellers rating their local roads in better condition than people who live in rural areas. Scotland's local roads are rated below the national average. Main roads and motorways are generally considered to be in better condition. There is strong agreement countrywide that local roads are getting worse, although main roads are not seen to be deteriorating as badly. This is supported by the hard evidence of the National Road Maintenance Condition Survey²² which shows deterioration in most classes of roads over the past 20 years, the notable exception being trunk roads, although even these have got worse in the last three or four years. A recent survey by MORI for the County Surveyors Society²³ showed an increase in dissatisfaction with the road system and road maintenance over the past year.

Figure 5.31
Road conditions – local roads

"How do you rate the condition of the main roads in your area, in terms of maintenance/pot holes etc?"

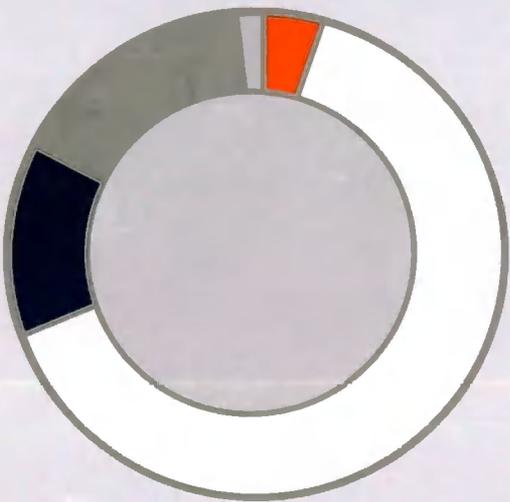
	All	City	Urban	Rural
Excellent	1	3		
Good	51	43	53	50
Neither good nor bad	12	16	12	9
Bad	29	25	29	30
Appalling	7	3	6	11
Rating (max 7)	4.1	4.4	4.1	3.9

Base: All motorists
Source: RAC Report on Motoring 2002



Figure 5.32
Road conditions – motorways

“How do you rate the condition of the main roads/motorways that you use regularly in your area, in terms of maintenance/pot holes etc?”

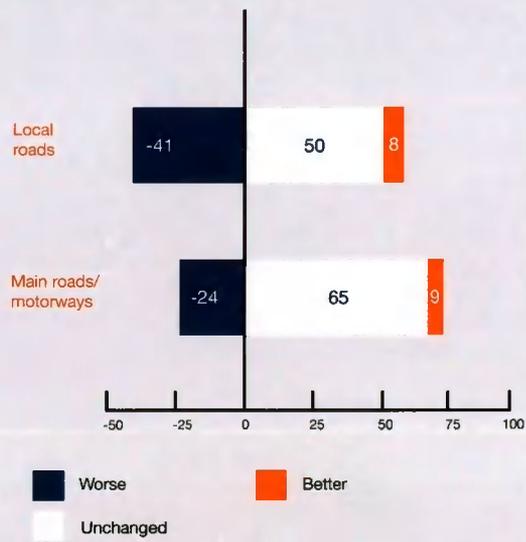


1% Appalling 66% Good
18% Bad 2% Excellent
13% Neither good nor bad

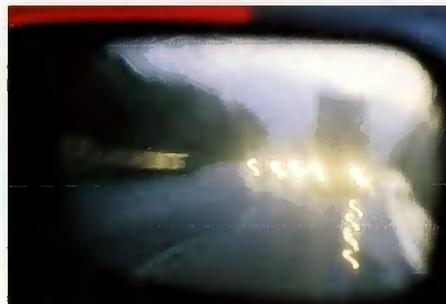
Base: All motorists
Source: RAC Report on motoring 2002

Figure 5.33
Changes in road conditions

“Are these roads getting better or worse?”



Base: All motorists
Source: RAC Report on Motoring 2002

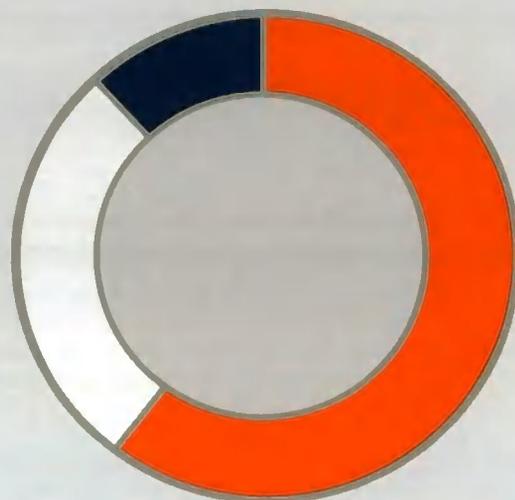




Britain is not renowned as a nation of complainers and complaining about road conditions is difficult because there is no direct contact with the service provider. However, one in ten motorists have complained about road conditions, mainly to their local authority, while a further three in ten would like to. This is equivalent to 12 motorists complaining per mile of road in Britain with a further 36 who want to. More publicity for the Highways Agency Hotline and equivalent local numbers may help people to bring faults to the attention of the appropriate body more effectively.

Figure 5.34
Complaining about road conditions

"Have you ever made/wanted to make a complaint about road conditions or road works?"



10% Yes have done 60% No
30% Would like to

Base: All motorists
Source: RAC Report on Motoring 2002

Figure 5.35
Making a complaint about road conditions

"To whom did/would you complain?"

%	Made complaint	Wanted to
Local authority	73	52
Highways Agency	8	14
Used Highways Agency helpline	7	6
Department of Transport	3	6
Local councillor/police/MP/other	14	9
Don't know		19

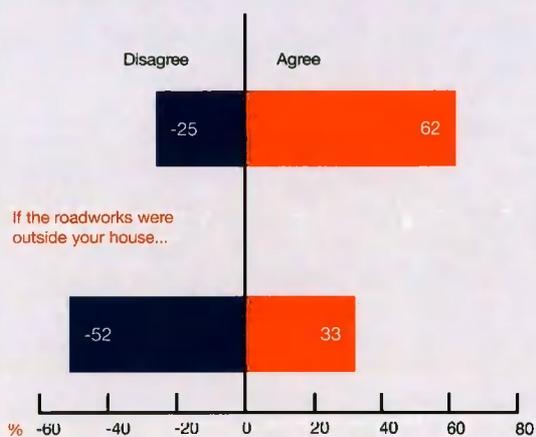
Base: All motorists who complained/wanted to complain
Source: RAC Report on Motoring 2002



Roadworks are seen as a significant source of congestion (figure 3.31) so speeding them up should be welcomed as a way of reducing the problem. Motorists are very keen that companies who dig up the roads should work 24 hours a day to reduce the time of the works on trunk roads or roads away from residential development. This option is supported "as long as it is not outside my house".

Figure 5.36
Speeding up roadworks

"People who dig up the roads should work 24 hours a day to reduce the time of the roadworks."



Base: All motorists
Source: RAC Report on Motoring 2002





5.4 Parking at home

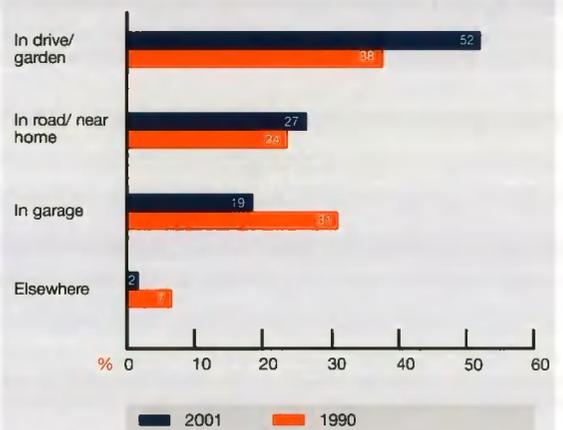
Residential parking is important because parked cars take away road space from vehicles on the move and lack of parking is potentially a constraint on car ownership, especially in inner cities. Across the country most motorists can park their car on their own premises, either in the drive (52%) or garage (19%). There has been a major shift since 1990 when this question was originally asked. In 1990 nearly a third of drivers parked their car in their garage compared with only a fifth in 2001. There are a number of possible explanations:

- families may have more cars than garage space
- garages might be more often used as store rooms rather than as garages, or have been converted for other purposes, hence 'fewer garages'
- cars could be larger and therefore not fit inside
- cars start more reliably in the morning and do not need the warmth of a garage

Where there is more than one car in the household, the second car is also often parked in the drive rather than on the road, possibly because multiple car households tend to be more affluent and have space available. Drivers of older cars tend to leave them in the road rather than in a garage. Older drivers are more likely to put their car in a garage while those in city centres are more likely to leave them in the street.

Figure 5.41
Night time parking

"At night where do you normally park the car you drive most often?"



Base: All motorists
Source: RAC Report on Motoring 2002

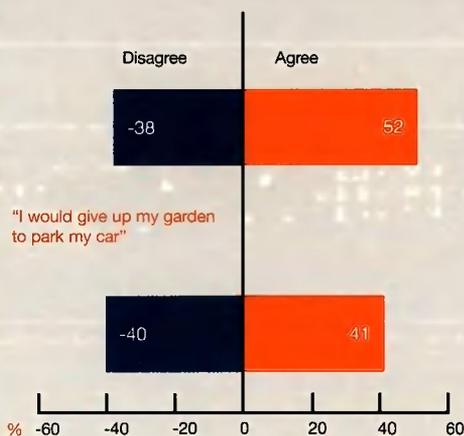
Parking on the street is not always a necessity as a quarter (26%) of those who park on the street at night say they could find somewhere to park off the road. However, two million drivers (1 in 14) do not have enough off-road space for all the cars in their household.





Figure 5.42
Attitudes to parking

"On street parking is a problem in this area"



Base: All motorists (7% of these have no garden)
Source: RAC Report on Motoring 2002

On-street parking is considered a problem by half (52%) of all motorists, but this rises to 61% in London. Where they have enough off street parking for themselves, motorists are generally not concerned about the problem of street parking. Four in ten motorists would be prepared to give up their garden to park their car off the road, though an equal proportion would not. However, in areas where on-street parking is a problem generally, there is much stronger support for giving up their garden.

A surprisingly high number of motorists (16%) would be prepared to pay to reserve a space outside their home, even if they park off the road anyway. Even 13% of those who have no problem parking outside their home would be prepared to pay for the privilege.

Figure 5.43
Yellow lines

"Could you tell me what a single/double yellow line on the road means?"

%	Single line*	Double line*
No parking at certain times/ designated times	59	4
You can only park to load or unload	14	2
You can park for a few minutes only	10	
No parking during working hours	9	1
No parking at any time	4	93
Don't know	5	1

Base: All motorists
Source: RAC Report on Motoring 2002

*Figures rounded

The regulations for yellow lines to control parking have changed over the years and the use of parking zones covering large areas means that it is not always easy to know what the yellow lines mean. A single yellow line usually forbids parking during the working day. Loading of goods is specifically marked by yellow flashes on the kerb and is usually allowed on a single yellow line. Just parking for a few minutes to pop into a shop or use a cash dispenser is not allowed, although widely practised. A double yellow line means no parking at any time. Nearly every motorist has a good idea of what both types of yellow lines mean, although 10% believe that a single yellow line gives them permission to park for a few minutes.

Londoners are less likely to risk parking for a few minutes on a single yellow line while those in a rural area are prepared to take a chance, reflecting the difference in enforcement and potential impact in the two areas.

Section 6: Cars and drivers in Britain





- Car ownership trends
- Use of the car
- Servicing the car
- Profile of Britain's car drivers
- Profile of Britain's cars

Section 6:

Cars and drivers in Britain

6.1 Car ownership

Figure 6.11
Current and expected level 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
Actual	2001	1	56	43
Expected in 2000 for	2002	1	51	48
Expected in 2001 for	2003	4	53	43

Base: All motorists
Source: RAC Report on Motoring 2002

The proportion of car owning households again rose in 2000 and now represents 73% of all British households, based on several large scale government surveys: Family Expenditure Survey, General Household Survey and the National Travel Survey. The number of cars on the road, as published by SMMT based on DVLA data, has risen from 26.6 million at the end of 1999 to 27.2 million in 2000. The results from the RAC Report on Motoring Survey show the average number of cars per motoring household is 1.55 compared with 1.57 last year. Households with company cars have an average of 1.76 cars per household; those with older people have 1.43.

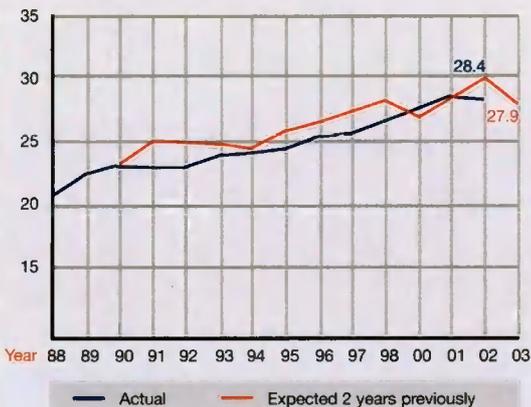
This year's projection of expected car ownership in two years' time is 1.50 cars per household with a regular motorist, compared with a projection of 1.67 last year. This is the first time the expectation has been lower than the current level. This may be because the fieldwork was undertaken in September immediately after the 11th September attack in New York and confidence may have been at a very low level²⁴. More people say they will have just one car in their household in two years' time and fewer expect to have additional cars. 4% overall expect to have no cars in their household in two years' time; this rises to 8% amongst those over 55.

Passing the driving test is the most important trigger to increased household car ownership with over a quarter of motorists who have added cars to their household ascribing the increase to this factor. A growing family is the next most important, closely followed by the need for a car to get to a job. The main reason for reducing household car ownership is demographic – someone moving out of the household. One in five of those giving up a car (either historically or in the future) say it is because they are not using it. This is the main reason given by the elderly, who also mention giving up the car for health reasons or because someone is retiring. About one in twelve of those changing the number of cars in their household mentions financial considerations as a reason for either increasing or decreasing the number of cars they own.

Figure 6.12
Current and future car ownership

Grossed up estimates of number of cars in Britain at time of surveys and expectations in two years time

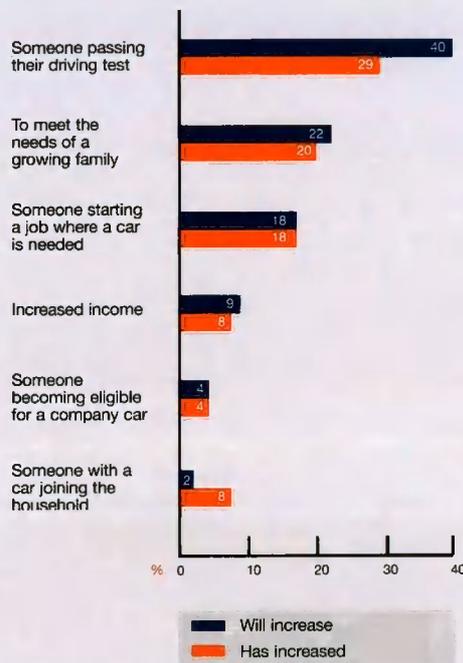
Number of cars (millions)



Base: All motorists
Source: RAC Report on Motoring 2002

Figure 6.13
Reasons for increasing car ownership

“Why do you think the number of cars in your household will/has increased?”



Base: All motorists who will increase or have increased car ownership
Don't knows excluded
Source: RAC Report on Motoring 2002

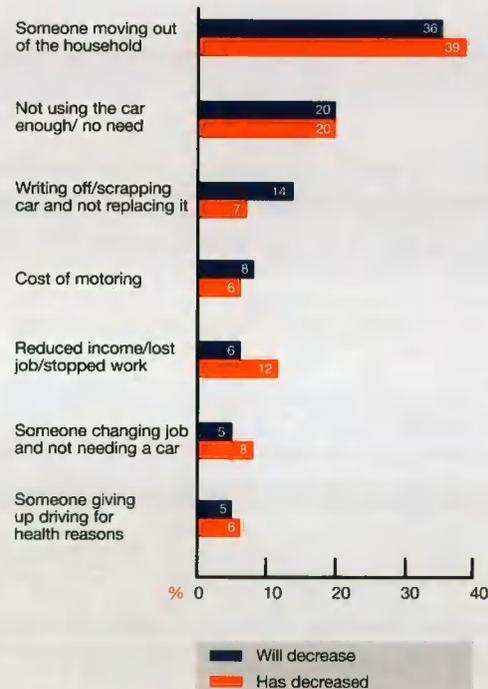




There is no evidence that the number of company cars is decreasing or that the forthcoming change in benefit in kind taxation is likely to discourage company car ownership. Indeed Lex Vehicle Leasing estimates that the change could lead to an increase of 400,000 company cars. If, for any reason, company car drivers did give up their company car, the vast majority (79%) would replace their car, with only 11% saying they would give it up altogether. If this 11% did give up their company cars, this would reduce the number of cars on Britain's roads by around 300,000 cars or 1% of the total. Those drivers seeking replacements would mainly chose a nearly new or used car rather than a new one.

Figure 6.14
Reasons for decreasing car ownership

"Why do you think the number of cars in your household will/has decreased?"



Base: All motorists who will decrease or have decreased car ownership
Don't knows excluded
Source: RAC Report on Motoring 2002

Figure 6.15a
Replacing company cars

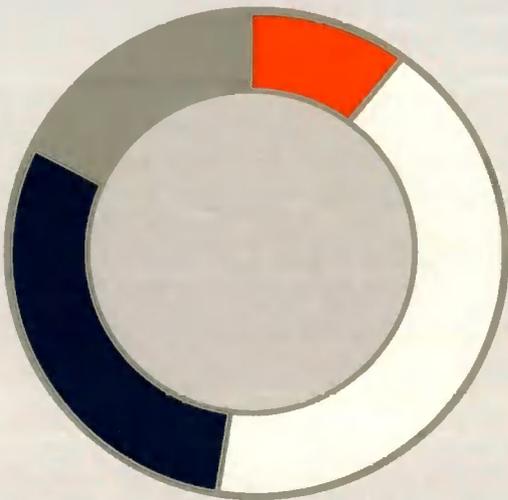
Company car replacement



The length of ownership (the period already owned and the expected time until the car is sold) is an important measure of attitudes towards car ownership. There was a noticeable increase in the average length of ownership for both private and company cars in the early 1990s, partly reflecting the increasing reliability of cars but also the 1991/1992 recession.

Figure 6.15b
Replacing company cars

Type of replacement car

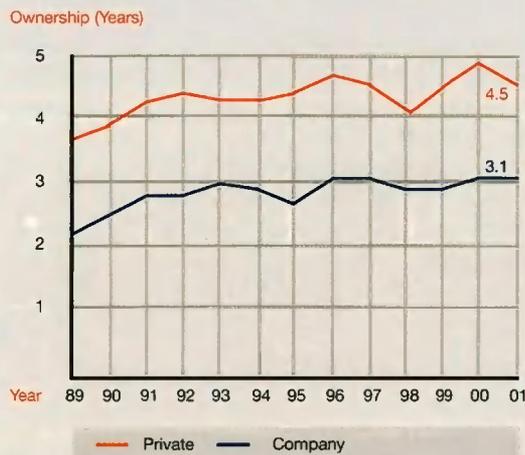


18% New
42% Used
31% Nearly new
9% Don't know

Base: All company car drivers
Source: RAC Report on Motoring 2002

Figure 6.16
Length of ownership

"How long are you likely to keep your current car? Add the number of years current car owned to the number of years likely to keep it"



Base: All motorists
Source: RAC Report on motoring 2002

For the past eight years as a whole, private owners have lengthened their ownership from around 4.3 to 4.5 years while company car owners have increased by a similar proportion from 2.9 to 3.1 years. This increase could be ascribed to greater confidence in the reliability of the current generation of cars. The lengthening of the change period led to reduced sales of new cars.





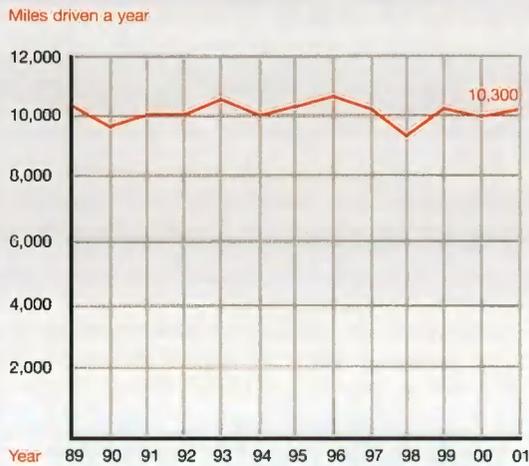
6.2 Using the car

On average, Britain's cars are driven 10,000 miles each year – a figure which has remained constant for the past 13 years despite changes in the economy and the increase in the number of cars, which could be expected to reduce the mileage done by each. This trend is confirmed by the government's own statistics, even allowing for the fact that the RAC survey only covers motorists who drive at least once a month. Men drive about a third more (11,400 miles per year) than women (8,700). Company car drivers drive more than twice as much (20,600 miles per year) as private drivers (9,300).

Over 70% of company car drivers' miles (14,800) is on business, excluding travel to and from work. Private owners in employment also use their car for work purposes, driving on average 2,200 business-related miles. This means that company car drivers cover around 5,800 non-work miles a year and private drivers in employment, 7,000. There are two possible reasons for this: for most company car drivers their car is essential for their job because they are visiting customers or other parts of the company and are therefore "commuting" to a regular office less; also because they drive so much on business driving during the week, they may wish to cover fewer private miles at the weekend.

Figure 6.21
Annual mileage – trend

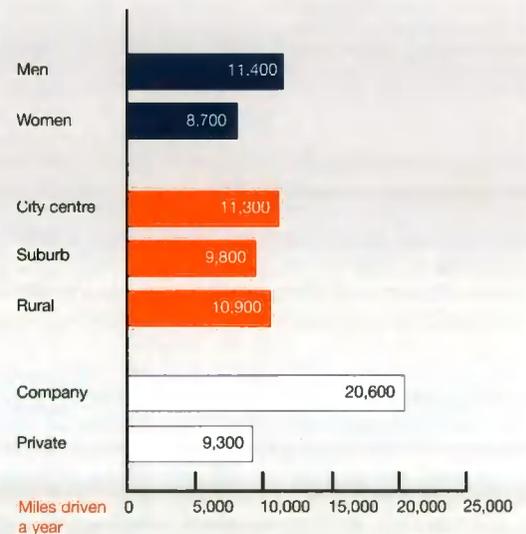
"Approximately how many miles is the car that you drive most often driven a year, on average?"



Base: All motorists
Source: RAC Report on Motoring 2002

Figure 6.22
Annual mileage by group

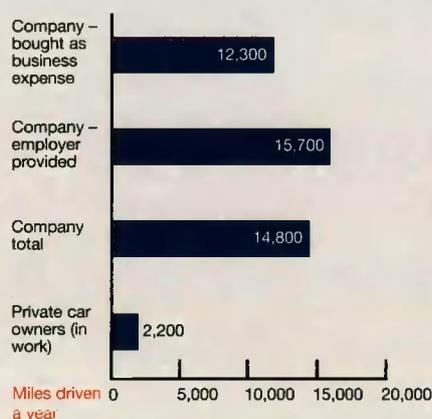
"Approximately how many miles is the car that you drive most often driven a year, on average?"



Base: All motorists
Source: RAC Report on Motoring 2002

Figure 6.23
Annual work related mileage

“Approximately how many miles is the car that you drive most often driven a year in connection with your work, on average?”



Base: All motorists
Source: RAC Report on Motoring 2002

6.3 Buying the car

Just under half (46%) of all regular motorists had bought a new car or used car in the past two years, which is consistent with the average length of ownership of 2.6 years shown in figure 6.16. Of those, 40% were bought new and the rest bought nearly new (under one year old) or second hand. This is equivalent to some five million used cars a year, somewhat lower than in the recent past. The source of purchase is shown in figure 6.31. About a quarter of used cars are bought through used car dealers (typically those between four and six years old) while slightly fewer, mainly older cars, are bought privately.

Cash remains the most likely way to pay for both new and used cars, with over half of all buyers choosing that method. Two thirds of used car buyers pay cash, twice as many as use some form of loan. New car buyers are more likely to use a loan but they also buy through Motability (a UK charity scheme to provide vehicles for disabled people and their families), contract purchase and contract hire. 23% of company car drivers know their car was purchased on contract hire but over a quarter (27%) do not know how their car was bought. The actual penetration of contract hire amongst employer provided cars is about 40% according to research by Lex Vehicle Leasing.

Figure 6.31
Source of purchase of used cars

“Where did you buy the nearly new or second hand car you bought most recently?”

Where bought	Millions of cars (Annual average over past two years)
Used car dealer	1.5
Private dealer	1.2
Friend or relative	0.8
Franchise dealer for your make	0.8
Other franchise dealer	0.4
Auction	0.1
Used car superstore/trade centre	0.2
Total	5.0

Base: All who bought nearly new or used car in past two years
Source: RAC Report on Motoring 2002



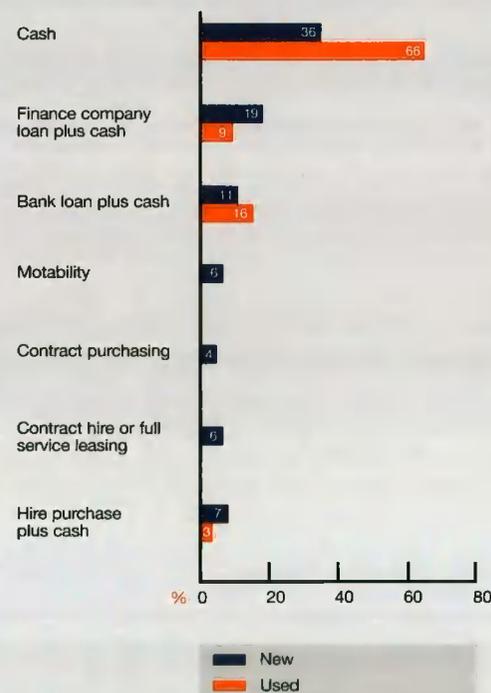


The average cost of a new company car is around £18,000 while for private buyers of new cars it is £11,800. For used cars the average figure is £6,000.

Drivers perceive their cars are currently worth about 70% of what they paid for them, on average around two years ago, equivalent to 16% depreciation per year. The reality is likely to be somewhat gloomier with depreciation running at nearer 20% per year for new cars. (See section 5.1)

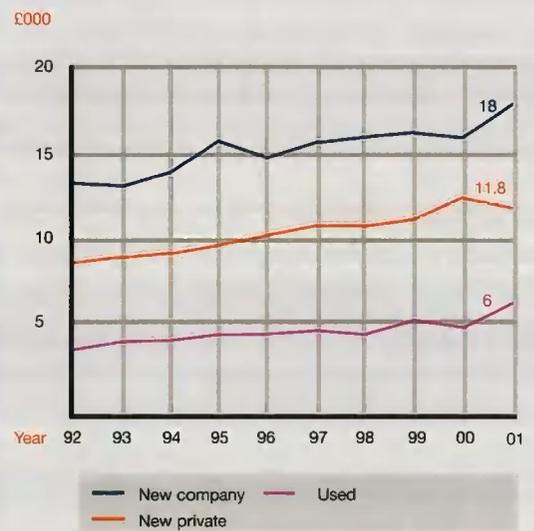
Figure 6.32
Source of finance for car purchase

“How was the car used most often financed?”



Base: All motorists
Source: RAC Report on Motoring 2002

Figure 6.33
The purchase cost of car driven most often



Base: All motorists
Source: RAC Report on Motoring 2002



6.4 Servicing the car

88% of men and 61% of women are responsible for arranging the servicing of the car they use most often. 50% of companies are responsible for servicing the cars they provide to their employees, the remainder leave it to the employee.

The average number of services per year has again fallen – this year it is 1.16 services (compared with 1.26 last year and 1.35 the year before). The number of repairs has not changed (0.67 per year). The lower number of services reflects continuing reductions in manufacturers' service intervals, based on increasing reliability. The real improvements in reliability are, to a degree, hidden by the ageing of the car parc, with a quarter of the cars on the road now exceeding 10 years in age.

The trend of servicing is towards using a franchised dealer or workshop and away from "do it yourself", as cars have become more complex.

Figure 6.41
Frequency of servicing and repair

"How many times has your car been serviced or repaired in the past year?"

Average number of services or repairs



Base: All motorists who have car serviced
Source: RAC Report on Motoring

Figure 6.42
Service location

"Which of these do you tend to use for car servicing?"

%	2001	1988
Serviced by main dealer	35	31
Serviced by garage/workshop	34	29
Friend/acquaintance	14	15
Do it yourself	11	23
Service centre	4	1
Mobile service unit	3	1
Main dealer for different make	3	3

Base: All motorists with responsibility for servicing
Source: RAC Report on Motoring 2002

The choice of servicing location depends on the age of the car. Main dealers tend to be used by owners of newer cars and there is a switch to garages and DIY as the car gets older.

Figure 6.43
Use of franchised dealer for servicing

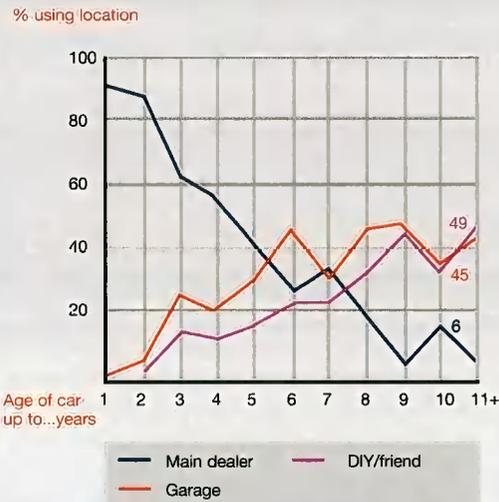
% using franchised dealer for servicing



Base: All motorists with responsibility for servicing
Source: RAC Report on motoring 2002

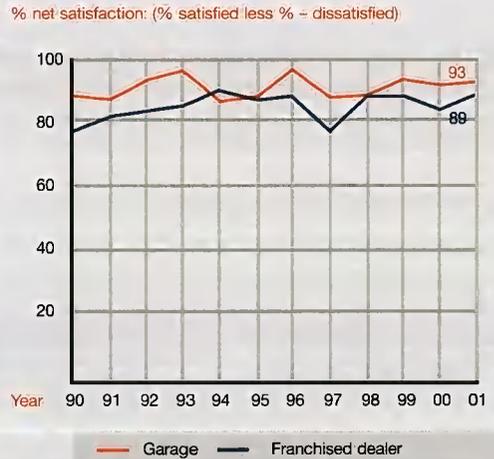
Satisfaction with servicing remains high, with a slightly higher net satisfaction among motorists who use a non-franchised workshop compared with those using a franchised dealer. Once satisfied with the quality of vehicle and customer service they receive, motorists on average have remained loyal to their service location for 4.5 years. The longer they own their car, the more loyal they are to their service location. Loyalty is lowest at franchise dealers, who primarily service new cars, that is those still belonging to the first owner, many of whom remain loyal until they change their car and then may go to the dealer where they bought their replacement car. Those who use a garage are more likely to change service location because of price.

Figure 6.44
Servicing location and age of car



Base: All motorists who have car serviced
Source: RAC Report on Motoring 2002

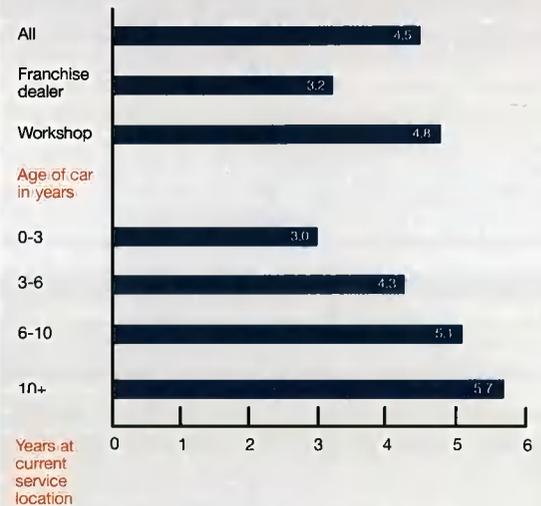
Figure 6.45
Satisfaction with servicing location



Base: All motorists responsible for servicing who use dealer/garage
Source: RAC Report on Motoring 2002

Figure 6.46
Loyalty to servicing location

“How long have you been using this place for servicing?”

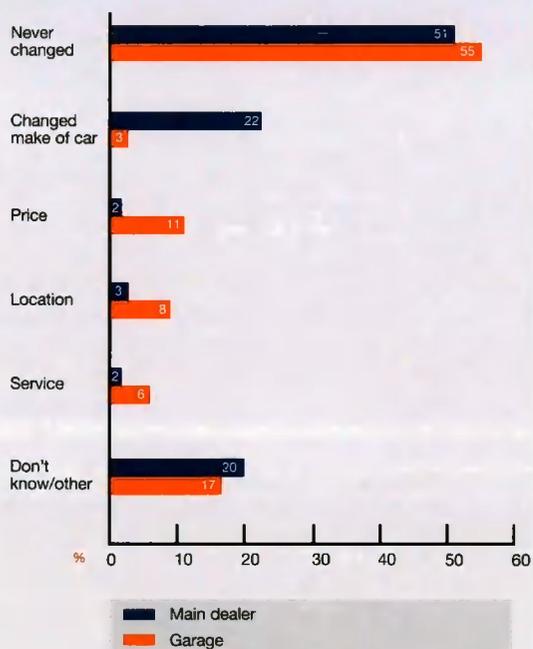


Base: All motorists with responsibility for servicing
Source: RAC Report on Motoring 2002



Figure 6.47
Changing servicing location

“Why have you changed your servicing location?”

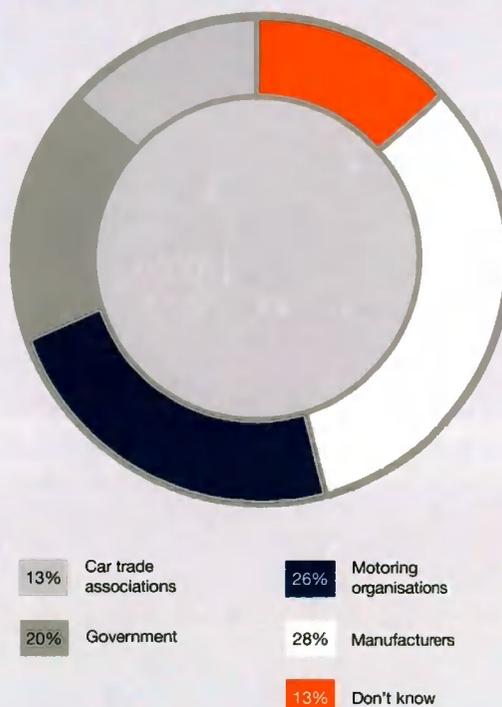


Base: All motorists with responsibility for servicing
Source: RAC Report on Motoring 2002

One way of improving standards in service locations is to have standards set by an outside body. Motorists rank manufacturers and motoring organisations as most appropriate to set such standards, followed by the government and trade associations. The proportion saying trade associations has fallen to 14% from 22% in 1991, all the others gaining slightly.

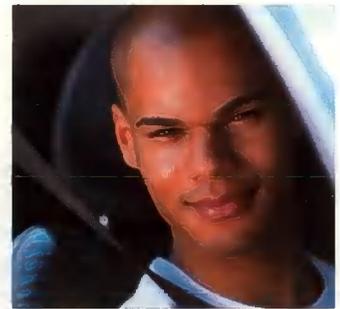
Figure 6.48
Setting the standards for servicing

“Which of these should set the standards to which garages and other servicing outlets should service cars?”



Base: All motorists
Source: RAC Report on Motoring 2002





6.5 Profile of Britain's car drivers

Figure 6.51
Profile of Britain's car drivers

		Car drivers %	Whole pop'n %
Sex	Male	58	49
	Female	42	51
Age	17-34	30	32
	35-54	46	35
	55+	24	33
Class	AB	22	22
	C1	35	27
	C2	26	22
	DE	17	29

Base: All motorists (1,354)
Source: RAC Report on Motoring 2002

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

Figure 6.52
Profile of new car buyers

		2001 %	1988 %
Sex	Male	56	69
	Female	44	31
Age	17-34	27	19
	35-54	48	40
	55+	25	41

Base: All who recently bought new cars
Source: Lex / RAC Report on Motoring 2002

Figure 6.54
Profile of company car drivers

		2001 %	1988 %
Sex	Male	74	80
	Female	26	20
Age	17-34	25	27
	35-54	61	59
	55+	14	14

Base: All who drive company cars
Source: RAC Report on Motoring 2002

Figure 6.53
Profile of used car buyers

		2001 %	1988 %
Sex	Male	61	67
	Female	39	33
Age	17-34	38	45
	35-54	46	36
	55+	16	19

Base: All who recently bought used cars
Source: Lex / RAC Report on Motoring 2002

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. Over the past three years, this has averaged 6%. 79% of company car drivers describe their car as an "essential part of my job". It is possible that the abolition of the low mileage penalty for company car drivers will encourage more drivers to accept perk cars.



Figure 6.55
The importance of company cars in the workplace

%	1993	1994	1995*	1996	1997*	1998	1999	2000	2001
Essential part of job	69	71	73	77	77	82	80	79	77
Helpful part of job	12	10	13	12	13	10	11	12	12
Part of remuneration package	15	8	7	11	9	3	7	3	7
No opinion	4	11	4	0	0	5	2	6	4

Base: All who drive company cars
Source: Lex / RAC Report on Motoring 2002

*Figures rounded

6.6 Profile of Britain's cars

Figure 6.61
Profile of Britain's cars – new versus used

%	All cars	Still owned from new	Bought used
New versus used			
Still owned from new	27	100	0
Bought used	73	0	100
Type of ownership			
Bought privately	92	79	96*
Provided by an employer	6	18	1*
Business expense	2	3	2*
Age of car			
0-3 years	24	54	10
3-6 years	22	25	22
More than 6 years	54	21	68

Base: All motorists
Source: Lex / RAC Report on Motoring 2002

*Figures rounded



Figure 6.62
Profile of Britain's cars – private versus company cars

%	Private cars	All	Company cars	
			Provided by employer	Business expense
New versus used				
Still owned from new	23	67	82	33
Bought used	77	33	18	67
Type of ownership				
Bought privately	100	0	0	0
Provided by an employer	0	70	100	0
Business expense	0	30	0	100
Age of car				
0-3 years	22	55	64	33
3-6 years	22	29	28	33
More than 6 years	56	16	8	34

Base: All motorists
Source: RAC Report on Motoring 2002

Figure 6.63
Grossed up estimates of numbers of cars in Britain at time of surveys and expectations in two years time

	Households in GB (m)	Households with cars (%)	Ave. cars per household	Grossed up no. of cars (m)	Expectation in two years time		
					Year of expectation	Cars per household	Grossed up no. of cars (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	28.0
1999	24.7	72.0	1.53	27.2	2001	1.57	28.8
2000	24.9	73.0	1.57	28.5	2002	1.62	29.9
2001	25.1e	74 73.0e	1.55	28.4	2003	1.50	27.9
2002	25.3e	74 73.0e	1.54		2004	1.49	
2003	25.5e	74 73.0e					

24.1
24.4
24.6
24.8
25.0
25.1

Base: All motorists
Source: Lex / RAC Report on Motoring 2002

e = estimate

6.7 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.

Figure 6.71
Driver profile by region

%	All	London & South East	SouthWest & Wales	Midlands & East Anglia	North of England	Scotland
Number of drivers (m)	28.0	9.1	2.1	6.8	6.6	2.4
Total annual mileage	10,300	9,900	10,300	10,200	11,000	10,300
% of drivers where car was bought from new	26	28	26	26	25	32
% of regular drivers in households with more than one car	43	51	40	44	38	36
% of drivers who are female	42	43	41	47	41	38
% of drivers who are under 25	8	9	9	8	6	5
% of drivers who are over 65	10	11	12	8	8	14

Base: All motorists

Source: Lex / RAC Report on Motoring 2002



Appendix 1

Research methodology

Basis of the research

The RAC Report on Motoring 2002 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 1,354 regular drivers (defined as driving at least once a month) face to face at home between 15 September 2001 and 14 October 2001 in 100 constituency points in Great Britain. The sample was boosted to a total of 174 company car drivers and 320 drivers who live in London.

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 half of the sample. The base for those questions is therefore around 680.

The "Teenagers" survey involved face to face in home interviews with 311 children aged 13 to 16 interviewed at home on the same occasion as their parents were interviewed for the main survey.

It should be noted that the cited source of this year's research is "The RAC Report on Motoring 2002". Up until 1999, the research is cited as "The Lex Report on Motoring" and from 2000 as "The RAC Report on Motoring". Consistent research methods were used throughout.

Statistical reliability

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown 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
1,354	+/- 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 1,354, if 50% answered in a particular way, we would be 95% confident that the true range is between 47% and 53%.

Appendix 2

Sources and acknowledgments

- | | | | | |
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