

Making the most of Britain's roads



Figures from this report may be freely quoted (except for commercial purposes and when used in commercial press releases) provided that reference is made to 'The RAC Report on Motoring 2003: Making the Most of Britain's Roads, published by RAC Motoring Services'

This report was prepared for RAC by Sarah Clarke and her team at Market Dynamics under the editorial control of Harry Mirpuri at RAC. The original research for this report was undertaken by Sample Surveys and Swift Research.

Motoring organisation RAC supports its six million individual and business customers with breakdown cover and a wide range of other individual motoring solutions. The RAC Foundation for Motoring is an independent body established to protect and promote the interests of UK motorists. The views of each organisation should not be attributed to the other.

Design: RAC Design

Printing: Hampton Printing (Bristol) Ltd

January 2003

Price £149

ISBN 0-95350-496-4

© Copyright 2003

RAC Motoring Services
 RAC House
 1 Forest Road
 Feltham
 Middlesex
 TW13 7RR

Tel: 020 8917 2500
 Email: hmirpuri@rac.co.uk
 Website: www.rac.co.uk

The RAC Report on Motoring 2003 Making the most of Britain's roads

Contents

RAC Consumer Services	02
Foreword by Findlay Caldwell, Managing Director, RAC Consumer Services	03
Summary	04
The impact of previous RAC Calls to Action	06
RAC Call to Action	07
Section 1: Congestion – a problem that will never go away	08
Section 2: Control of demand through charging for road use	12
Section 3: More efficient use of road space through route planning	20
Section 4: Making more of existing roads through the use of hard shoulders	22
Section 5: Improving traffic flow through better management of road maintenance	24
Section 6: Control of demand through parking charges	26
Section 7: Encouragement of car alternatives through increased use of bus lanes	29
Appendix 1: Research methodology	32
Appendix 2: Sources and acknowledgments	32
Appendix 3: Index	33

RAC Consumer Services

RAC Consumer Services sells a comprehensive range of individual motoring solutions to consumers and 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 training from RAC-owned BSM.

In addition to breakdown assistance RAC Consumer Services' non-roadside services include:

- RAC Financial Services, providing a range of insurance, loans and other financial service solutions
- RAC Legal Services, providing legal advice to motorists on a range of issues such as car accidents and personal injuries
- RAC Auto Windscreens, the UK's largest manufacturer and installer of vehicle windscreens with over 900 fully trained fitters operating from the largest network of specialist fitting centres in the UK
- BSM, the UK's largest and most reputable driving school with an unrivalled high street presence

Other RAC services include Travel Services and Hotels which offer advice on all aspects of travel – from warnings of congestion ahead to providing holiday travel insurance or recommending the best hotel in town – and RAC's expert vehicle examiners who offer an impartial opinion when you decide to buy a used car.

RAC Public Affairs

RAC's Public Affairs team spearheads campaigns on behalf of RAC Consumer 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 plan safe journeys for the route to school, complement the activities of the RAC Foundation for Motoring, an independent charitable organisation which champions the interests of motorists.

RAC plc

RAC plc (formerly Lex Service PLC) provides motoring and vehicle solutions to individual and business customers, ranging from teenagers who are learning to drive with BSM and families who enjoy peace of mind with RAC breakdown cover, to the Ministry of Defence which trusts us to supply and maintain all its non-combatant vehicles and other services.

For more information about RAC, visit www.rac.co.uk

Enquiries:
RAC Press Office
020 8917 2742

January 2003

Foreword by Findlay Caldwell, Managing Director, RAC Consumer Services

How can we make the most of Britain's roads? RAC's 1,350 patrols attend more than 2.5 million call outs each year and with 105 years' presence in the motoring sector, we know just how important it is to keep motorists moving. But with congestion increasing year-on-year, it is evident that we can currently make only the best of the situation on our roads – by planning journeys more carefully, receiving real-time information and, to some extent, accepting that trips take longer than they should.

'Making the Most of Britain's Roads' shows what motorists think about a variety of measures to combat congestion. It is clear that we neither want to pay more for road use or parking spaces nor are we prepared to compromise on safety through measures such as the use of the hard shoulder on motorways to speed up our journeys.

However, when we consider that our use of public transport will need to double every 12 to 14 years just to keep congestion at today's levels, we can see that we need to think more radically and differently if we are to solve the problem of congestion.

RAC believes that rather than submitting ourselves to further restrictions on car use by the authorities, we should turn the spotlight inwards and ask motorists to make the difference themselves. If everyone took one less journey a week by car – by car-sharing, using public transport, or working from home for example – congestion on our roads would drop dramatically.

Our roads are busy, stressful places, and we need to adopt a new way of thinking if we are to free them up for easy pain-free travel once more, although the Government's announcement in December 2002 of significant investment in the motorway network should go some way to easing congestion and bottlenecks.

'Making the Most of Britain's Roads' has inspired us to campaign for the motoring public to make individual motoring resolutions – whether changing driving patterns, driving more courteously or improving road safety skills. Almost 9 in 10 motorists agree that they would find it difficult to live without their car and it would be unrealistic to expect motorists to completely change their mode of transport. But making one small change could result in improvements for everyone.

This is a campaign that I am pleased to support wholeheartedly, and I have committed myself to a Motoring Resolution of reducing the amount of hard-braking and acceleration of which I am guilty.

I hope that you will join us in trying to make a difference to our roads.



Findlay Caldwell, Managing Director
RAC Consumer Services

Summary

Motorists are more dependent than ever on their cars, with 9 in 10 saying it would be difficult to adjust their lifestyle to being without the car and only 1 in 3 saying they would use their car less if public transport were improved.

Investment in the road network is failing to keep up with the growth in traffic levels. Between 1991 and 2001, road traffic increased by 15%, yet road length only grew by 9%. Use of public transport would need to double in the next 12 to 14 years even to maintain car traffic at its current level.

The current evidence suggests congestion is a problem that needs to be managed rather than eliminated. The research investigated a variety of different measures that could potentially help in managing congestion. These fall into four main areas; financial penalties, journey planning, capacity utilisation and road maintenance.

1 Financial penalties:

- Road charging is now seen as inevitable by almost half of motorists. Despite this, support remains low (20%) and even in London – where charges will be introduced from February 2003 – only 16% of motorists believe they will have a significant impact on traffic levels.
- Motorists' main concern is that road charging is just another method of raising taxes (three quarters of all motorists agree).
- For motorists to be more supportive of such schemes, they want to see monies raised from charges spent on transport (69%) as opposed to other public services such as education (2%). They also want to see real benefits – 49% would support road charges if the money raised was spent on improving existing roads.
- Companies are also directly affected by road charging, and their reaction toward them is mixed. They are more in favour of road charging than workplace parking charges – 94% would be prepared to pay road charges for their company car drivers on work-related journeys and 8% say they would pay charges on their employees' private journeys. This contrasts with 70% of fleet managers strongly opposing the introduction of workplace parking charges.

2 Journey planning:

- Motorists are starting to change the way they plan their journeys with a third of motorists now embracing new technology such as the Internet to plan their journey routes.
 - Once on the move however, motorists still prefer the old favourites such as roadside message signs and local radio broadcasts.
- ### 3 Capacity utilisation:
- Changing the capacity of existing roads through increased use of hard shoulders as an extra lane is widely opposed. 84% of motorists believe the capacity of motorways should not be increased in this way – mainly because of the safety risk they believe this change brings.
 - Motorists also have mixed views about the effectiveness of bus lanes – a third agree they encourage people to use public transport and two fifths agree they reduce congestion – although a similar proportion disagree.

4 Road maintenance:

- Motorists feel strongly about the condition of the roads in the UK, in particular about the poor quality of the road surface and the extent of roadworks.
- On a scale of 1-10, where 1 is no problem and 10 is a major problem, motorists rated the quality of the road surface 6.3 on local roads and 5.2 on major roads. Similarly, they rated the extent of roadworks 6.0 and 6.2 on local and major roads respectively.
- Over half of motorists support utility companies being charged when they dig up the road for planned road repairs and three quarters believe utility companies should co-ordinate their work, so that road-works are carried out less frequently.

The impact of previous RAC Calls to Action

Over the past eight years RAC has made various Calls to Action based on the conclusions of our research for the Reports on Motoring. Our Calls have covered issues such as the environment, road rage, speed limits, school travel and driver training.

RAC is proud not only to contribute to current debates on these issues, but also to attempt to make a difference as a company. For example, following a Call to Action made in 1999, RAC now sponsors the Baywatch campaign, which aims to highlight the abuse of disabled parking spaces by non-disabled drivers. In 2000 RAC also welcomed the Government's initiative to include hazard perception testing in driving tests. BSM now provides computerised training to help novice drivers with this essential learning process.

We have made several Calls over the years for traffic on the school run to be examined. RAC's award-winning Grass Routes programme challenged pupils to examine the environmental consequences of their method of travel to school. The programme this year focuses on road safety and journey planning and has been taken up by over 2,000 secondary schools.

Driver safety is another important focus for RAC. In 2001 we called for an education programme to ensure drivers know what to do in the event of a breakdown on the motorway. The Survive group, of which RAC is a part, was set up to do just this and has produced a clear and comprehensive guide to staying alive on the hard shoulder. We also called on the Government to commit itself to not using the hard shoulder as a running lane for congested motorways, and we continue to campaign on this matter.

Since 1996 we have made several calls for high polluting cars to be taken off the roads, and for the environmental impact of cars to be made clear to buyers. The car manufacturing industry has now started to label the environmental standards of cars, and the Government's CO₂ taxation on company cars from April 2002 has made drivers consider their choice of vehicle more carefully.

Some of our Calls have predicted recent developments. For instance in 1998, we stated that "controls on driving in town centres are acceptable to many...in the form of charges, not taxes, so that money can go back into transport". Whether congestion charging in London will work, and whether it will be acceptable in practice remains to be seen. In 2000 we suggested that driver rectification schemes should be extended, to allow drivers to pay for targeted training instead of a fine or endorsements. Avon and Somerset police now run a very successful scheme that aims to educate and retrain drivers in a bid to change behaviour permanently.

The Calls to Action with the first Reports for 2003 focus on responsibilities – the responsibility of a company to ensure the safety of all drivers; and also the responsibility that each and every motorist in the UK has to consider his or her driving behaviour and how it could be improved. At RAC we will be continuing to campaign for a better transport environment for all, and attempting to do our bit to help.

RAC Call to Action

In past RAC reports, we have concluded our research with a Call to Action – often asking the Government to help us in our goal of a more effective, safer and more environmentally friendly motoring environment. Some of these previous requests and the responses we have had are shown on the facing page.

This year our Call to Action does not go out to the Government – although we ask them to consider the views that motorists have clearly expressed in our research – but asks each of us, as individuals, to do our bit in helping to make the most of our roads.

RAC invites everyone to make a New Year Motoring Resolution and register it on the RAC website (www.rac.co.uk). In this Motoring Resolution we ask everyone to consider how they drive, the journeys they make, and how they can contribute to making the most of our roads. All of these play a part in the degree of congestion we each encounter on the roads. This is an obvious way in which we can think about how we can make the most of our roads.

It is also easy to forget how our driving – which soon becomes second nature – affects others around us. This can be in terms of safety or just in helping to make travelling a more pleasant experience. In a different way, this can also help to keep traffic flowing smoothly and safely.

We have listed below some of the resolutions we have already received, but in case you think that whatever you do will make no difference, consider this: If... we all cut out one short journey per day – say half a mile to the shops or to school – then traffic would be reduced by five billion miles per year. This is equivalent to a 4% drop in traffic – making everyday like those lighter traffic days we encounter during school holidays. It would also mean 300 million less gallons of fuel consumed each year.

Make your resolution today at www.rac.co.uk

Some resolutions:

"I will stop using my phone when I am driving"

"I am only going to use the outside lane for overtaking"

"I am going to go to more meetings on the train"

"My neighbour and I are going to share a ride every morning"

"My company is going to invest in a video conferencing facility that really works"

"I am going to make my children walk to school"

"I am going to work from home once a week"

"I will try to be more polite on the roads"

"I am going to walk to the newsagents to buy my paper"

Section 1 Congestion – a problem that will never go away

The issue of congestion remains at the forefront of debate and in this report we examine not only motorists' reliance on the car but also some of the methods that are being put forward to encourage the use of alternative methods of transport. In this first section, we consider how dependency on the car has changed over time and look at motorists' attitude towards changing their travel behaviour.

Congestion is a problem we have to live with

Congestion, a result of economic growth, increased road traffic and a lack of a viable alternative for many journeys, is a massive problem. Investment in the road network is failing to keep up with the growth in traffic levels. Between 1991 and 2001, road traffic increased by 15%, yet road length only grew by 9%.

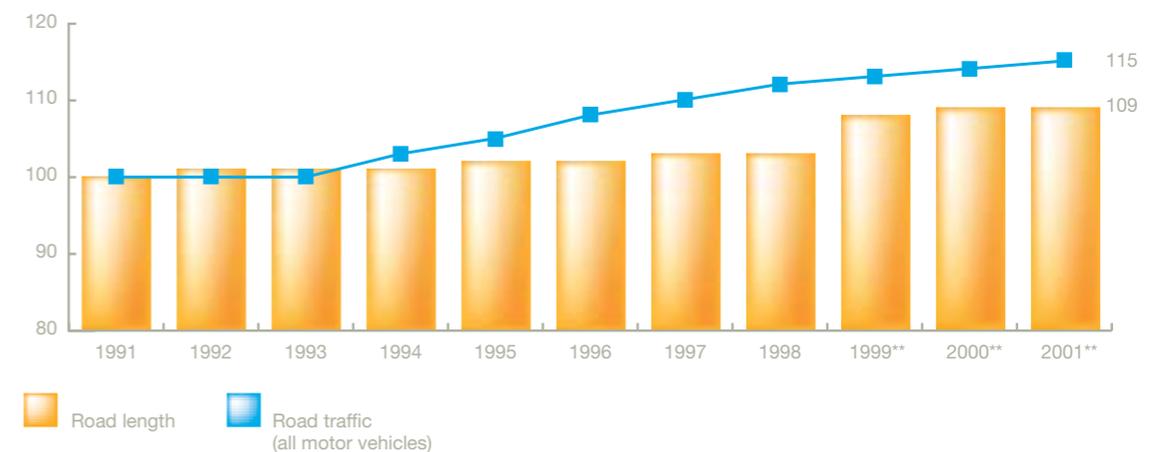
A November 2002 report from Trafficmaster highlights how significant the problem of congestion has become, estimating that drivers will waste 1.4 million working days in traffic jams in 2002, compared with about 975,000 lost working days in 1997.

Motorists recognise the significance of congestion. In 2001, they rated the problem of congestion in London as 2.8 on a scale of 1-3, where 3 is most serious, with other major cities scoring 2.4 and motorways scoring 1.8.

However, this recognition of the seriousness of congestion in no way appears to undermine the reliance of people on their cars. For the past 14 years the RAC Report has consistently identified over 8 in 10 motorists agreeing with the statement "I would find it very difficult to adjust my lifestyle to being without a car" – this has risen again, to its highest level ever, at nearly 9 in 10 in 2002.

Sir Trevor Chinn, Vice Chair, Commission for Integrated Transport, believes the need to tackle congestion does not mean giving up the car. He states: "There is an obvious economic argument for us to load the roads but only to the point when congestion starts. The crucial factor is encouraging motorists to use the roads at different times."

Figure 1.1
Index* of road length and traffic in
Great Britain: 1991-2001



* 1991 = index 100

** from 1999 figures are given on a new basis.

Caution must be taken when directly comparing with earlier years due to the greater uncertainty in previous reporting methods

Source: Department for Transport (DfT)

Public transport remains an 'unconsidered' option

Motorists and their families are reliant on their cars and few currently consider public transport as a serious alternative – 34%, the lowest level since 1989, say they would use their car less if public transport were better.

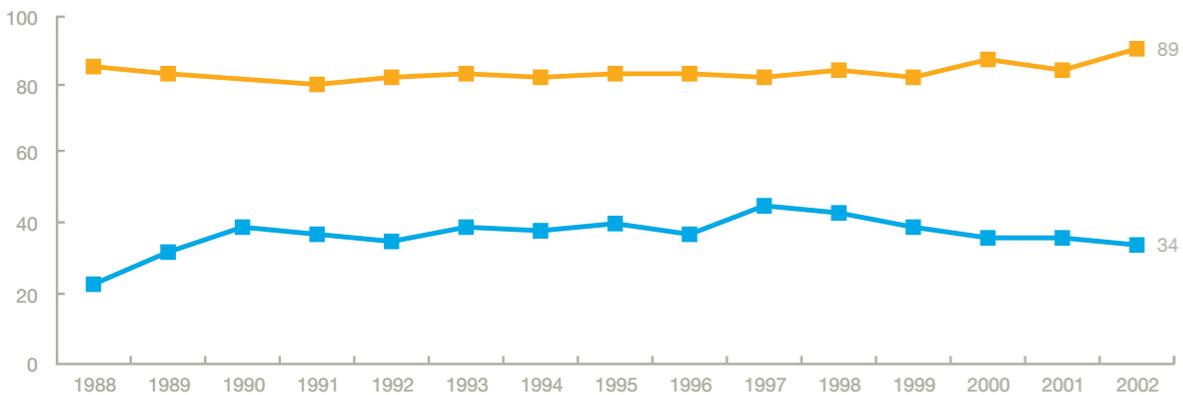
Data from the Department for Transport also shows that, despite an attempt to encourage motorists to switch from cars to public transport, motorists drove five billion more miles in 2001 than in the previous year – an increase which has largely stemmed from growth in car ownership. In line with these findings, in December 2002, the Secretary of State announced that Government targets to cut road traffic congestion will not be met. Indeed, the problem may actually get worse in the short term.

Helen Holland, Deputy Leader for Bristol City Council, sees the only way to encourage motorists to seriously consider alternatives to the car is to ensure that public transport is not seen as second rate. "Obviously improvements in public transport such as increased reliability and affordability are key, but public transport also needs to provide some advantages to users to compete with the car. Improved access to town centres, quicker journey times through provision of bus priorities, secure parking at park and ride sites, these are the sorts of tangible and visible benefits that will be persuasive."

Not only do a shrinking number of motorists see public transport as a viable alternative, but the scale of the problem suggests public transport can only ever be a partial solution. To even keep car traffic at its current levels, the use of public transport would need to double in the next 12 to 14 years – and then maintain that level of growth.

Despite this lack of willingness to change, half of motorists agree that people must be forced to reduce their use of the car (although, two thirds of all motorists don't want to change their personal driving behaviour).

Figure 1.2
Dependency on the car



■ % agreeing with the statement "I would find it very difficult to adjust my lifestyle to being without a car"
■ % agreeing with the statement "I would use my car less if public transport were better"

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

For the foreseeable future congestion is a problem that, realistically, needs to be contained rather than eliminated. Motorists' ideal is for congestion to be eliminated without incurring any financial or environmental penalties. However, they have become more sophisticated in their views and recognise that something needs to give. Research for the RAC Report on Motoring 2002 showed motorists believe the best solution to reducing congestion are: improving public transport (41%), road improvement (20%), reducing roadworks (15%), road charging (5%) and parking controls (3%).

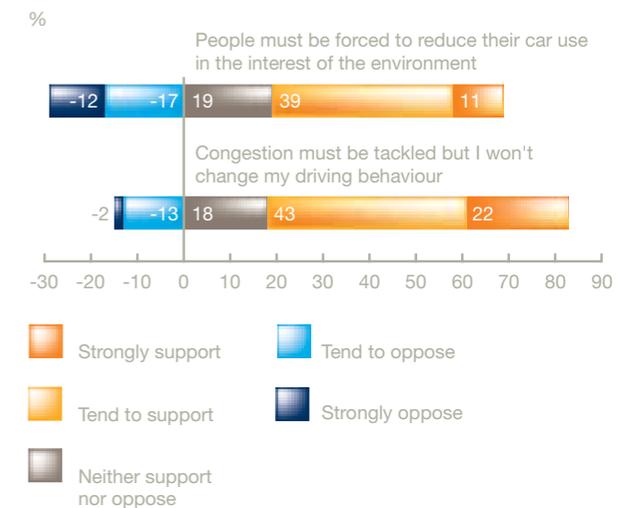
There is also growing evidence that motorists want someone to take overall responsibility for the quality and effectiveness of the road network – an independent RAC survey conducted in October 2002 found that 3 in 4 motorists supported the need for an independent Roads Regulator with responsibility for implementing a Motorists Charter.

In this special survey, we examine six of the options for managing congestion:

1. Control of demand through charging for road use.
2. More efficient use of road space through route planning.
3. Making more of the existing roads through the use of the hard-shoulder.
4. Improving traffic flow through better management of road maintenance.
5. Control of demand through parking charges.
6. Encouragement of car alternatives through increased use of bus lanes.

This report draws on the results of original research among the motoring public and also among fleet managers – responsible for company cars in medium and large businesses. For more information on the research method see Appendix 1.

Figure 1.3
Motorists' attitude towards change



Base: All motorists
Source: RAC Report on Motoring 2003

Section 2 Control of demand through charging for road use

With the imminent introduction of fixed congestion charges for driving into central London, this section of the report looks at the issue of road charging and provides insight into motorists' and companies' opinions on its use, impact and perceived benefits. Particular attention is placed on understanding how motorists would like to see the monies raised from road charging re-invested. To conclude the section, we look further into the future to gauge motorists' and fleet managers' opinions on the use of satellite tracking to charge for road use.

Limited support as the reality of central London charging bites

Charging for the roads that we use is an issue that commentators such as the Commission for Integrated Transport (CfIT) and the RAC Foundation have brought to the forefront. There are two main types of charges being discussed;

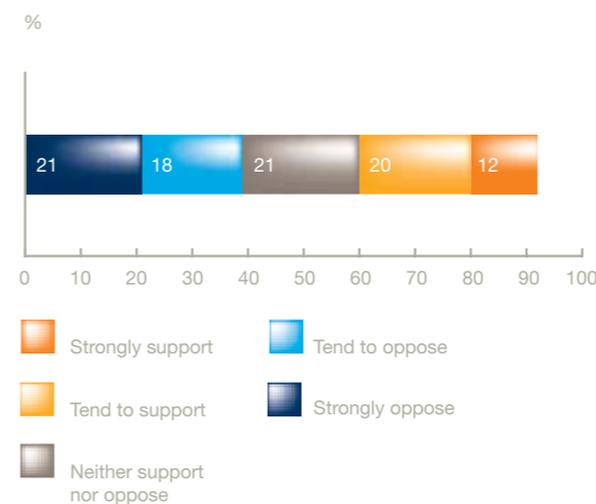
1. Fixed congestion charges: where motorists are charged a flat rate for using specific roads at pre-specified times of the day, such as the charges imposed on motorists to drive into the historic centre of Durham
2. Variable road user charging: where variable charges are imposed on roads identified as 'congested', at peak times.

Charging for road use, for most Britons, has remained theoretical. However, from February this year, fixed congestion charges will become a reality for the six million motorists who at some time drive into central London during peak periods – when they will be charged £5 per day for doing so during the day on Monday to Friday.

Only a third of motorists support the introduction of these charges and support is no greater (only 30%) among those who live in London. Among company car drivers, support has remained at a similar level (32%) to 2000 (35%) – although in 2002 there were significantly fewer company car drivers (20% compared to 32%) who strongly opposed the introduction of charges to enter London.

Also, 41% of motorists believe the £5 charge is too high, with this belief greater (59%) among those on lower incomes.

Figure 2.1
National support for the introduction of a fixed congestion charge for driving in central London



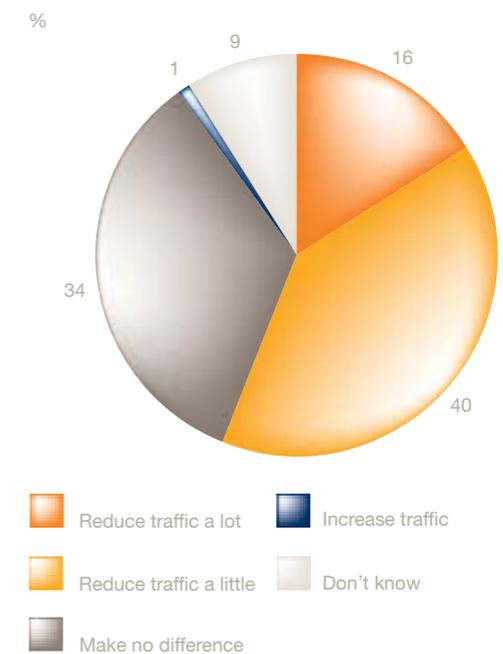
Base: All motorists
Source: RAC Report on Motoring

The benefits from road charges in London may be short-lived

Perhaps opposition to increases in the costs of motoring is to be expected, but will the central London scheme achieve its goal of improving congestion?

In 2001, 41% of motorists did not believe charging to enter London was a good way to reduce congestion, and these attitudes are mirrored in this year's research. The majority of all motorists (56%), believe road charging will reduce traffic to some extent but only 16% believe it will have a significant impact on traffic levels in central London – among those who live in London 8% believe road charging will reduce traffic a lot, with two thirds believing it will deliver some benefit, a third of all motorists also believe the introduction of a fixed congestion charge for driving in central London will make no difference to traffic levels.

Figure 2.2
The impact of a £5 charge on cars entering central London



Base: All motorists
Source: RAC Report on Motoring 2003

When those who drive in central London (2 in 10 motorists ever drive into central London – 1 in 5 of whom also live in London) were asked what impact they thought it would have on their personal travel patterns, 2 in 3 said it will make no difference. Among company car drivers this figure is even higher – and has increased from 2000 – with 3 in 4 saying it would make no difference to their travel patterns.

Nevertheless, 2 in 10 motorists who drive in central London say they will switch to public transport for some journeys, 1 in 3 say they will sometimes park outside the zone and continue by public transport and just under 1 in 3 say they will do the journey less often by car.

Figure 2.3
The impact of a fixed congestion charge in central London on journey patterns

	% agreeing with... (multiple response allowed)
I will not change my travel patterns	66%
I will travel at a different time when the charge does not apply	36%
I will park outside the zone and continue by public transport	31%
I will do the journey less often by car	28%
I will reduce the number of times I travel into the centre of London	25%
I will use public transport, walk or ride a bike more	21%
I will no longer do this type of journey	12%

Base: Motorists who ever drive into central London
Source: RAC Report on Motoring 2003

Even though the fixed congestion charge in London may become politically unpopular, in the short-term it should make a difference to traffic levels. Car traffic in central London in the morning peak has fallen by over 20% in the last decade. Transport for London predict it will fall by a further 10-15% after congestion charging is introduced, with a 1-2% increase in the use of buses, trains and the underground.

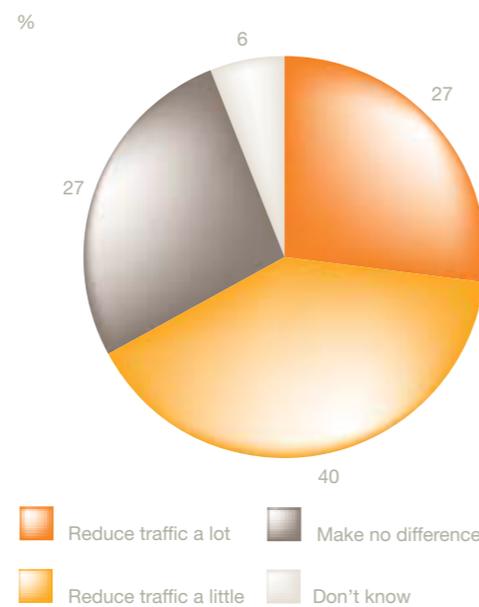
London First strongly backs the imminent introduction of charges to enter central London. Irving Yass, Director of Policy, feels that sustainable reductions in congestion can only be achieved if road charges are used in conjunction with a package of traffic measures. "Without other simultaneous measures to curb or at least contain congestion, the predicted 10-15% reduction in traffic levels may soon be replaced by evolutionary increases in commercial traffic stemming from new office development in central London".

Charging for road use would be more effective outside London

The current perceptions are that fixed congestion charges to enter major towns and cities would be more effective outside London. Two thirds of motorists believe introducing a £5 charge to enter their nearest town or city would have an impact on congestion (two thirds of motorists regularly drive into their nearest town or city).

When probed in more detail, some motorists believed the impact would be to reduce peak time traffic but increase off-peak traffic, at the same time increasing the use of public transport. Many also felt it would move congestion to surrounding areas and at the same time hit the local economy. In terms of the personal impact, 44% of motorists say it will make no difference to their travel patterns.

Figure 2.4
The impact of a £5 charge for entering nearest town or city



Base: All motorists
Source: RAC Report on Motoring 2003

There is however little backing for such initiatives. Only 24% of motorists support the idea of introducing a fixed congestion charge in the city centre closest to them, with even lower support (19%) among younger motorists.

Furthermore, support is low (26%) for the idea of provincial city congestion charges in general – as supported by research for the RAC Foundation, which found that less than half of motorists would be willing to pay tolls to drive in city centres.

Variable road user charging for motorways would work

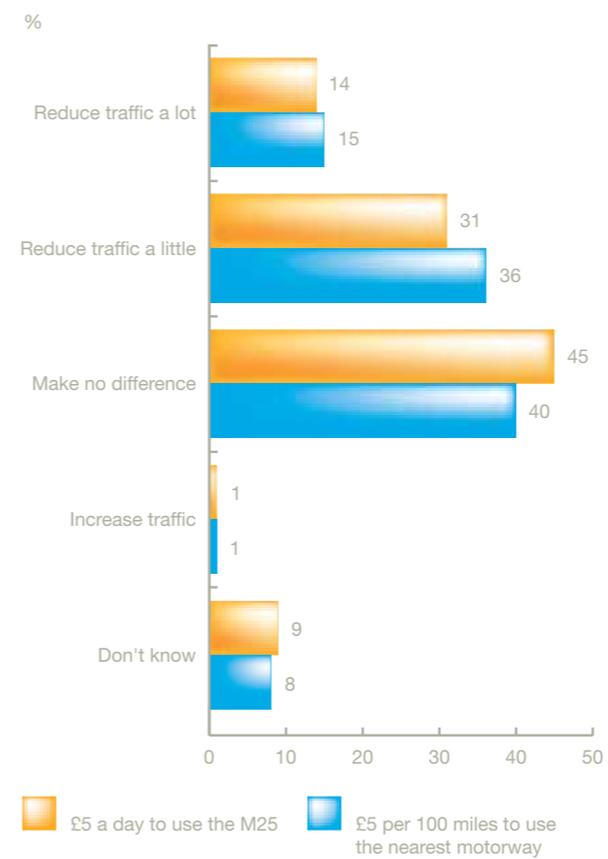
Variable road charges for using motorways is no more popular than fixed congestion charges in city centres, with 28% supporting the idea and just 8% strongly supporting the idea – even though significant numbers only use the motorway occasionally (46% use motorways less than once a month).

Although unpopular, people can see it would work – particularly on busy motorways such as the M25 and motorways closest to their home. Almost half of motorists believe it would positively impact on congestion on the M25 if a £5 charge were introduced for using it. This is almost identical to the proportion who think congestion would reduce on the motorway closest to their home if a charge of £5 per 100 miles were introduced.

A report commissioned by the Government Office for the South East, 'Orbit: transport solutions around London', undertaken by Kellogg Brown and Root in November 2002, has also concluded that "area-wide road-user charging would substantially reduce the volume of car commuting and the average length of commuting trips by car on the M25". The report suggests that sections of the M25 should be widened and an average charge of 10.5p per mile introduced for using such sections.

The Commission for Integrated Transport is committed to payment for road use but believes that any such schemes should be fiscally neutral. Sir Trevor Chinn, Vice Chair, states: "The reality is that roads are a commodity and to balance the demand and supply equation we have to pay more at times when everyone wants to use them. I do not believe, however, that any such scheme can be justified without simultaneous reductions in other costs of motoring."

Figure 2.5
The impact of road charges for motorway use



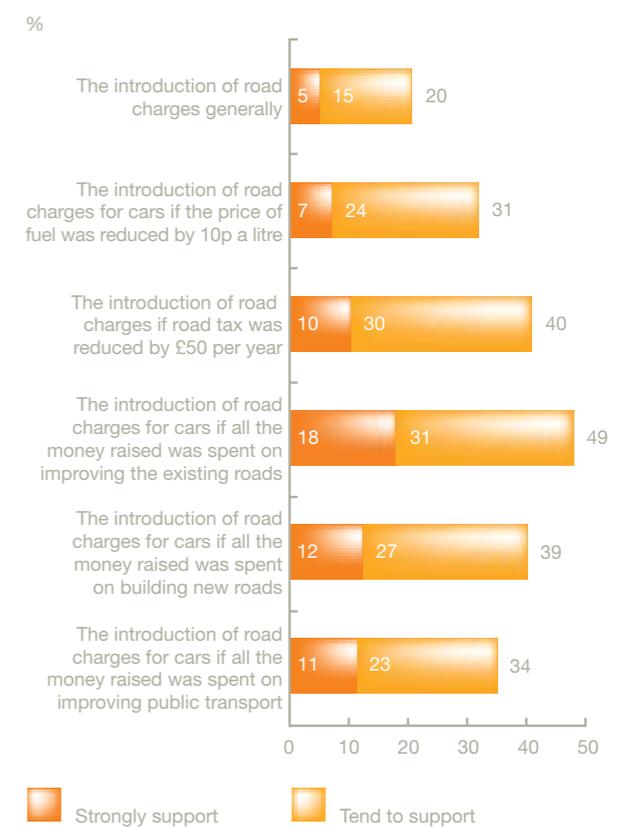
Base: All motorists
Source: RAC Report on Motoring 2003

On a personal basis, half of motorists who use the motorway network believe introducing variable road charges for using the motorway (at £5 per 100 miles) would have no impact on their travel behaviour while 32% say they would travel less by car.

Sweeten the pill by spending the money on roads

Although 43% of motorists now think that road charges to enter towns and cities or to drive on motorways are inevitable, there is little support for the concept – particularly if there are no tangible benefits from the charges. Only 5% strongly support the introduction of charging for road use in general, with 20% supporting it to some degree.

Figure 2.6
Support for the introduction of charging for road use



Base: All motorists
Source: RAC Report on Motoring 2003

Motorists' support shows some increase if road charges are associated with direct financial rewards for the motorist; 31% would support road charges if petrol duty was reduced by 10p a litre and 40% would support road charges if road tax was reduced by £50 a year.

What motorists really want to see, however, is more investment in roads and public transport. 49% would support road charges if the money was spent on improving existing roads, 39% if it was spent on new roads and 34% if it was spent on public transport.

Figure 2.7
Preferred areas of Government spending on transport

“If the money raised from road charges were to be spent on roads or public transport, which of the following best describes how you think it should be spent?”

% of motorists	2002
Increased investment in public transport	32%
Increased investment in maintaining roads	27%
Build more motorways and main roads	12%
Build more by-passes	9%
Widen Britain's motorways and main trunk roads	7%
Improve facilities for pedestrians and cyclists	4%
None of these	2%
Don't know	7%

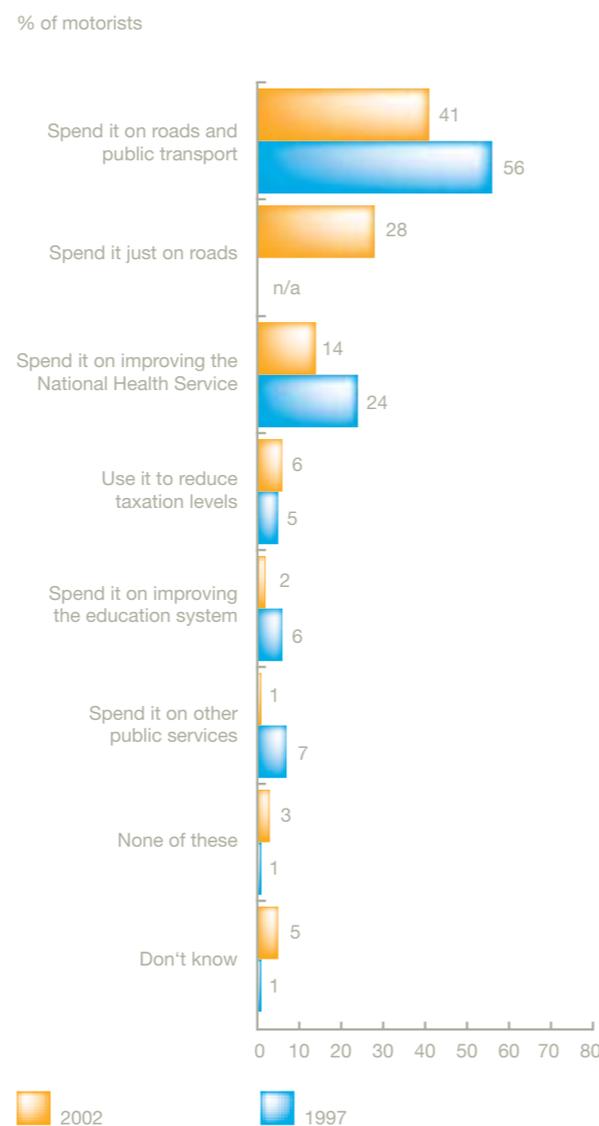
Base: All motorists
Source: RAC Report on Motoring 2003

Irving Yass, Director of Policy, London First states: “While we as an organisation believe it is necessary to charge for road use, we also believe motorists need to see simultaneous reductions in other motoring taxes and visible benefits to the road network. It is important that the monies are re-invested in improving the transport system, including both the national and local road network.”

Support for spending money raised from road charges on transport remains high – and has increased from 1997 – even when motorists are given the option of spending it on other key social areas. Just 14% want to see it spent on the NHS, 6% would like it to be used to reduce tax and 2% would like to see it spent on education, whereas 69% want the money spent on transport.

Figure 2.8
Preferred use of money raised through road charges

“Which one of the following best describes how you think Government should use the money raised from the introduction of road charging schemes?”



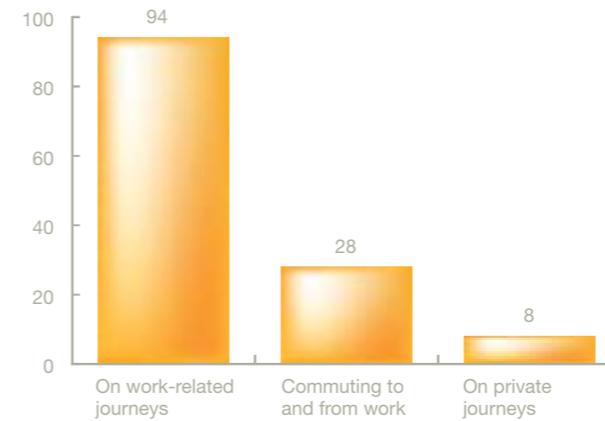
Base: All motorists
Source: Lex / RAC Reports on Motoring

Companies will pay up but will consider alternative vehicles

Introducing road charges – whether in towns and cities, or on motorways – would also be a charge on businesses. When fleet managers were asked who would pay such road charges for their company car drivers, 94% said the company would pay for work-related journeys but more surprisingly, 28% of fleet managers said the company would pay for charges incurred while commuting and 8% said they would pay for all charges on all journeys.

Figure 2.9
Corporate payment of road charges

% of fleet managers who say the company will pay the road charge for their company car drivers...



Base: All fleet managers
Source: RAC Report on Motoring 2003

The introduction of road charging will also make a difference to company car policies.

The 100% discount offered to the cleanest LPG vehicles in London, would make 56% of companies consider adding more LPG vehicles to their fleet, should such a discount scheme be introduced elsewhere. Two thirds would look at alternative fuels and low emission cars if they qualified for a discount in road charging schemes, although very few would consider offering motorcycles.

There are question marks over whether this discount for environmentally friendly vehicles will last. Policy could potentially change if too many fleets take up this option, resulting in congestion growth. Jon Walden, Managing Director of Lex Vehicle Leasing comments: “The industry needs to know where we stand in the long-term. We support our clients in their environmental policies, providing LPG and other low emission vehicles. This requires substantial financial commitment and companies need to know that environmental incentives will be around for some time to come”.

Significant numbers would also consider wider-reaching policy changes – half of companies would encourage more remote-business through phone, email and video conferencing as a result of road charging. Just over a quarter (27%) of companies would encourage greater use of public transport while a fifth (21%) would encourage more out of hours working when road charges did not apply. 26% of companies would also consider reducing the size of their company car fleet. Jon Walden highlights the real benefits these initiatives can provide: “We introduced video conferencing between our Marlow, Manchester and Stirling offices. It has resulted in fewer journeys, less emissions, massive time savings and a more relaxed work-force”.

Some companies have already announced changes to policy. BT is considering whether engineers are able to walk to certain repair jobs in central London to avoid the charges.

Spreading the amount of traffic on Britain's roads through encouraging employees to work ‘out of hours’ is one way in which companies can adapt their working policies. This is already happening in the south-east, with peak hours now extending from 6am to 11am and from 3pm to 8pm.

Figure 2.10
Changes to company car policies if road charges are introduced

	Likely	Neutral	Unlikely
Change our company cars to those with lower emissions which will be subject to discount or exemptions from charging schemes	68%	10%	22%
Encourage employees to conduct business remotely e.g. phone, email, video conferencing	48%	10%	42%
Encourage greater use of public transport on work-related journeys	27%	9%	64%
Reduce the size of the company car fleet	26%	5%	69%
Encourage employees to make work-related journeys outside of the hours when charges apply	21%	9%	70%
Encourage employees to have motorcycles which will be exempt from the charges rather than cars	2%	2%	96%

Base: All fleet managers
Source: RAC Report on Motoring 2003

Peter Mackie, Professor of Transport Studies at The Institute for Transport Studies, University of Leeds believes: “Although progress has been made with corporate Green Travel Plans, the prospects are limited without the implementation of network road user charging or changes to the taxation treatment of workplace parking. Once such a pricing system is in place, company incentives to promote car sharing, discounted travel cards, pool cars and so on will soon follow.”

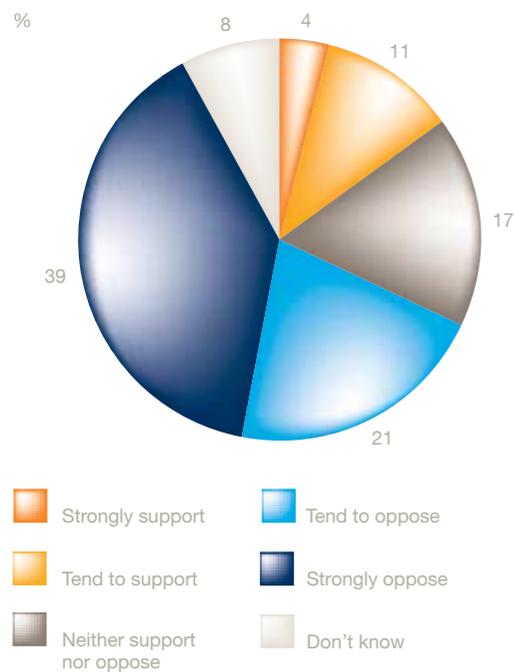
The future is frightening if the future is satellite tracking

Many experts in the transport field believe the ultimate solution to congestion problems and the inevitable future is completely variable road charging – charging for road use with different tariffs for different road types at different times of day. There are several different methods by which this can be done, of which satellite tracking (using Global Positioning System Signals) is seen by many as the most practical delivery mechanism.

Transport 2000 is an organisation that believes satellite tracking is the way forward. Stephen Joseph, Director, states: "The use of satellite tracking will not only enable a universal road charging system to be implemented but it will also prevent the opportunity for 'rat-running' on local or through roads. This will ultimately enable the free-flow of traffic across the whole network rather than purely shifting congestion to surrounding areas."

When the idea of using satellite tracking as a method for charging for road use was introduced to motorists, only 15% supported the idea.

Figure 2.11 Support for the introduction of a satellite tracking and charging scheme for cars

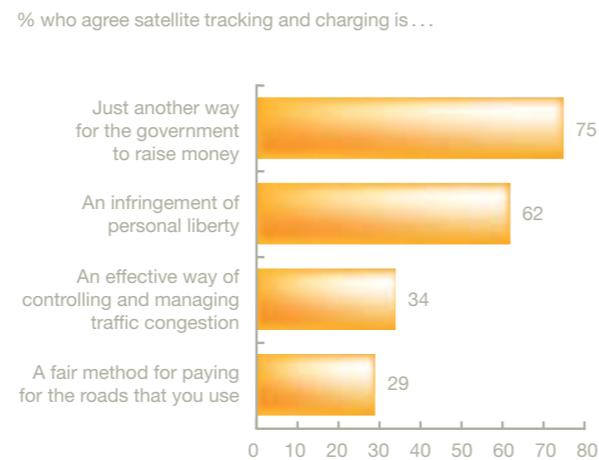


Base: All motorists
Source: RAC Report on Motoring 2003

This reaction by motorists is in part a reflection of their opposition to charging for road use – three quarters of motorists see it as just another device for raising taxes, while fewer than a third believe it to be a fair method for charging for the roads that they use.

However, opposition to the use of satellite tracking also stems from motorists' personal objections toward being monitored – just under two thirds of motorists believe satellite tracking represents an infringement of personal liberty. This fear could be potentially overcome by alternative satellite technology.

Figure 2.12 Perceptions about the use of satellite tracking for charging for road use



Base: All motorists
Source: RAC Report on Motoring 2003

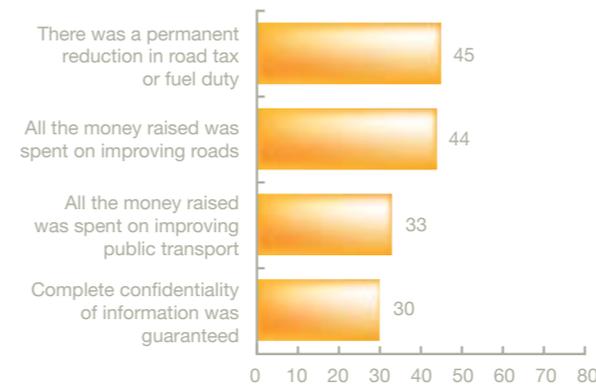
This rejection may just be an immediate response to an unfamiliar idea – mobile phone technology enables mobile users to be tracked at any given point in time, but their acceptability and perceived benefits have left any concerns about privacy behind. Motorists' support for the use of satellite tracking to charge for road use increases to 30% if complete confidentiality of information is guaranteed.

Motorists are also more likely to support being charged for their road use if specific improvements and investments are guaranteed – such as permanent reductions in road tax and fuel duty, and the money raised being spent on improving roads.

Despite all these objections, a third of motorists believe satellite tracking to charge for road use would be an effective method in reducing congestion.

Figure 2.13 Support for satellite tracking and road charging if specific guarantees are given

% of motorists who would support the introduction of a satellite tracking and charging system for vehicles if . . .



Base: All motorists
Source: RAC Report on Motoring 2003

Although motorists have personal objections to the use of satellite tracking for charging cars for road use, they do believe such a method is appropriate in some circumstances. Just over 1 in 3 would support satellite charging for UK trucks, rising to 6 in 10 supporting the idea for foreign trucks.

Very few motorists believe satellite tracking and charging will be a reality in the near future – just 1 in 3 think it could happen in the next five years and only 4 in 10 think it could be a reality within 10 years. In fact, for the half a million UK registered trucks and all foreign trucks entering the UK, it will be a reality in 2005/06. Although there are currently no similar plans for cars, the scheme for trucks announced in the 2002 Budget is potentially a prototype for introducing universal charging for other vehicles.

Section 3 More efficient use of road space through route planning

In this section of the report we consider motorists' use of route planning. The research examines the methods motorists use before setting out on a journey, such as using a journey planner on the internet, as well as how motorists adapt their journeys when on the road by monitoring traffic conditions. In particular, we highlight motorists' attitudes towards information systems such as in-car monitoring systems.

New technology leads the way in journey planning

Another method of easing the effect of congestion is route planning. As well as the other benefits this brings, route planning potentially allows motorists to avoid congested times and routes.

There are a number of ways in which route planning can be facilitated – through government provided schemes such as signage on roadsides, through commercial schemes such as Trafficmaster, or through personal initiative – seeking information from the radio or the Internet for example.

Currently route planning is largely done the old-fashioned way. 87% examine a road map, while half talk to a friend or relative about the best route to take. The Internet however, has risen up the route planning agenda – with a third now using it, compared with only a fifth in 2000 – and it has overtaken alternative information sources such as Teletext or telephone contact with motoring organisations such as RAC.

Figure 3.1
Route planning in advance of journeys

% of motorists who have ...	2000	2002
Looked at a road map	76%	87%
Asked a friend	n/a	52%
Used a journey planner on the Internet	19%*	34%
Contacted the venue / attraction you are visiting	n/a	23%
Checked Teletext / Ceefax for roadworks / congestion	9%	14%
Telephoned RAC or the AA	9%	11%

* also includes those who use a computer software program

Base: All motorists
Source: RAC Reports on Motoring

Motorists have yet to catch on to new technology when it comes to being on the move

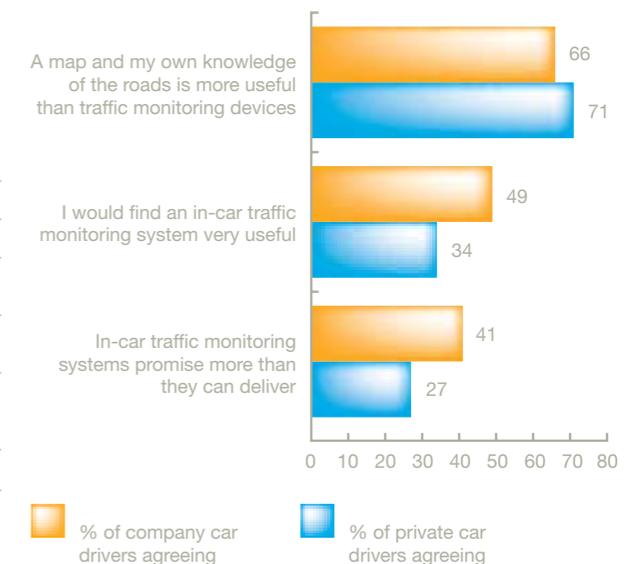
Monitoring of traffic conditions while on the move is almost exclusively done through roadside message signs or local radio broadcasts, even though two thirds of drivers agree that "traffic news on the radio always seems to be reported once you are already stuck in traffic".

Tim Matthews, Chief Executive of the Highways Agency, feels the way forward and ultimately the way to gain greater buy-in from motorists is the provision of real-time information. "We need to go beyond just reporting traffic jams to the provision of information such as average traffic speeds on different parts of the motorway network. Facilitating people's journey planning also needs to be taken a step further to enable motorists' access to journey advice such as route guidance and diversion strategies."

More than 8 in 10 motorists have never used 'new' information systems such as Trafficmaster, in-car mapping systems or information sources available through mobile phones (even though most drivers have a mobile phone). Use of these 'new' systems is also low among company car drivers, despite them being more likely to have access to such technology.

This low usage is in part a reaction against new technology – 3 in 10 motorists believe in-car monitoring systems promise more than they deliver, with many believing a map and personal knowledge to be the best source of information. Company car drivers share similar views, but at the same time half say in-car monitoring systems would be very useful.

Figure 3.2
Attitudes toward in-car monitoring systems



Base: All motorists
Source: RAC Report on Motoring 2003

The significant number of motorists who think in-car monitoring systems would be useful suggests that, when availability and price make these systems more accessible, take-up will be high. This view is also supported by research from the RAC Foundation which found that 8 in 10 drivers think that in the future all cars will use satellite navigation to tell the driver how to avoid traffic jams and how to get to their destination.

Section 4 Making more of the existing roads through the use of hard shoulders

The use of the hard shoulder to increase the capacity of motorways is currently being trialled. In this section, we consider motorists' and companies' attitudes towards these trials and gauge opinions on the potential safety risks its use may bring.

Widespread opposition to changing the use of the hard shoulder

The use of the hard-shoulder on motorways is in principle a simple and cheap way of increasing the capacity of the network. Currently, the hard-shoulder is used very selectively at a few junctions. However, the Highways Agency is considering proposals for intermittent use of the hard-shoulder at other selected points on the motorway network.

One particular experiment being planned by the Highways Agency is along a stretch of the M42, where the potential exists to use the hard shoulder as a normal traffic lane at peak periods and other times. This is part of a wider experiment on active traffic management, including better signage and safety refuges.

Chief Executive, Tim Matthews states: "The use of the hard shoulder can play a significant role in reducing traffic levels. In addition to its obvious use – in times of particularly heavy congestion – we also feel it can be beneficial in instances where an accident has occurred. What needs to be recognised is that its use can only be as part of an overall package of active traffic management measures in controlled conditions to ensure the safety of road users is not threatened."

Research for this report shows there is continued widespread opposition to this idea from both motorists and corporate bodies alike. Only 16% of motorists agree that motorway capacity should be increased by allowing cars to use the hard shoulder – this is a very similar proportion to 2000 when motorists were asked whether they thought the hard-shoulder should be used for this purpose in periods of heavy congestion.

The main reason behind motorists' opposition is the safety risk they believe that this change could bring. It remains to be seen whether the associated traffic management measures the Highways Agency is to trial will have any impact on the extent of motorists' opposition.

8 in 10 fleet managers strongly believe that the loss of the hard shoulder would put motorists who have broken down at risk, with 9 in 10 strongly believing it would hinder access for emergency services. Feelings also run strong among motorists, with 9 in 10 believing it would represent a risk.

Figure 4.1
Opposition toward the use of the
hard shoulder to increase road
network capacity

"Loss of the hard shoulder would ..."

	Put motorists that break down at risk	Hinder access for the emergency services
% of fleet managers who strongly agree	82%	90%
% of fleet managers who tend to agree	14%	6%
% of fleet managers who disagree	2%	1%
% of motorists who strongly agree	61%	68%
% of motorists who tend to agree	28%	23%
% of motorists who disagree	5%	2%

Base: All motorists, all fleet managers
Source: RAC Report on Motoring 2003

Section 5 Improving traffic flow through better management of road maintenance

In this section of the report we examine motorists' perceptions of the road network and determine the key problems. The section also highlights what motorists believe are the main causes of road works and how policies surrounding the activities of utility companies on our roads should be reviewed.



The quality of the UK's roads remains a major issue for motorists

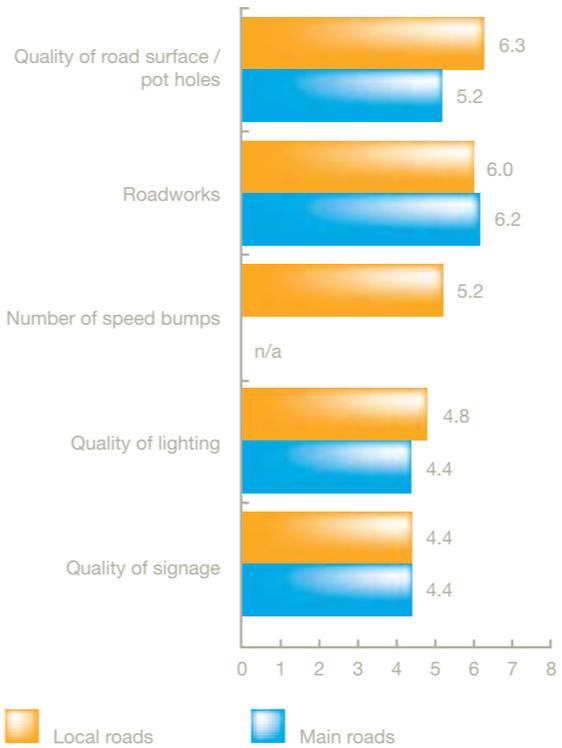
The management of the road infrastructure is another element in improving traffic flow. There are two key issues to be considered – the quality of the roads and their maintenance (i.e. the process of repairing them).

Most motorists believe the quality of the roads in the UK is a major problem – 4 in 10 motorists say the quality of the road surface has caused them to change routes at some time, specifically to avoid a poor piece of road. Research for the RAC Report on Motoring 2002 also highlighted how 9 in 10 motorists do not believe that the condition of roads (either local or main) is getting any better.

When motorists were asked to score various aspects of local road quality on a scale of 1-10 (where 1 was no problem and 10 was a major problem), the most severe problems were the poor quality of the road surface and the extent of roadworks. Of lesser concern was the number of speed-bumps, the quality of lighting and road signage.

Figure 5.1
The quality of Britain's roads

Average score out of 10, where 1 = no problem and 10 = a major problem



Base: All motorists
Source: RAC Report on Motoring 2003

The same two issues emerged as the greatest problems on major roads. Motorists rated roadworks 6.2 and the road surface 5.2 on the same scale out of 10.

The Highways Agency recognises motorists' concerns and while it believes there is still an important role for further development of the network – through road widening or building – it places strong emphasis on the need to improve the management of the existing network. Tim Matthews states: "One critical way to improve our roads is the way in which we manage maintenance. Increasingly motorists will notice how few roadworks take place during the peak hours of the day and similarly how much effort we, as an organisation, are taking to minimise the proximity of roadworks along any one stretch of road."

Co-ordination of utilities demanded by motorists

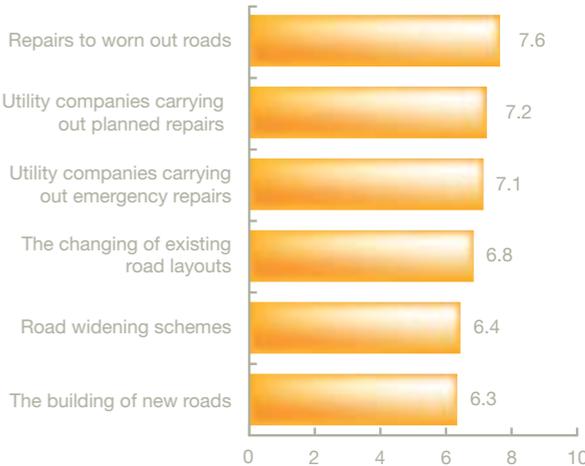
The policies that motorists want government to pursue surround the activities of utility companies, perceived as one of the two major causes of roadworks. Motorists believe the major causes of delay through roadworks are repairs to worn out roads and utility companies – whether they are undertaking routine or emergency works. Also of concern, but to a slightly lesser extent, are roadworks caused by changes to road layouts, road widening or new road building.

The New Roads and Street Works Act 1991 empowered local authorities to impose charges on utility companies for prolonged periods of roadworks as well as for quality defects to the repaired roads. Motorists however, still feel stricter policies are required:

- More than half of motorists (58%) would like to see utility companies charged each time they dig up the road for planned repairs, whilst a third would like to see similar charges for emergency repairs.
- Three-quarters of motorists believe that utility companies should be required to co-ordinate their work, so that roadworks are carried out less frequently but for longer periods of time.

Figure 5.2
Perception of the main cause of roadworks

Average score out of 10, where 1 = a minor contribution to roadworks and 10 = a major contribution to roadworks



Base: All motorists
Source: RAC Report on Motoring 2003

Section 6 Control of demand through parking charges

Although parking controls have been evident on our roads for many years, more recently they have increased in number and become more diverse. This section of the report deals with two main issues – the use of work-place parking taxes and the use of schemes to charge the private motorist. Consideration is given to the effect the introduction of work-place parking taxes would have on company policy, as well as looking at the current ease and costs of parking.

Corporate rebellion over work-place parking tax

One of the specific measures the Government has introduced is allowing local councils to impose a tax on parking places provided at work.

Previous research for Lex Vehicle Leasing highlighted widespread opposition to this policy. The fleet managers interviewed for this year's RAC survey were also mostly against such a policy. If a £150 per space per annum charge were applied to their organisation, only 4% would support such a policy – an almost identical level to 1999 – while 70% would strongly oppose it.

Helen Holland, Deputy Leader for Bristol City Council, feels the decision of whether to impose a tax on parking spaces provided at work is a question of balance. "I believe the decision needs to be largely based upon the specific circumstances of the area in question. Whilst such taxes may provide a stimulus to encourage employees to use alternative means of transport, in many areas (and such is the case in Bristol) a significant amount of traffic is through traffic not directly attributable to the companies located in the central area. In such instances, imposing a work-place tax will not necessarily deal with the heart of the problem and options such as congestion charging may provide a better and more appropriate solution."

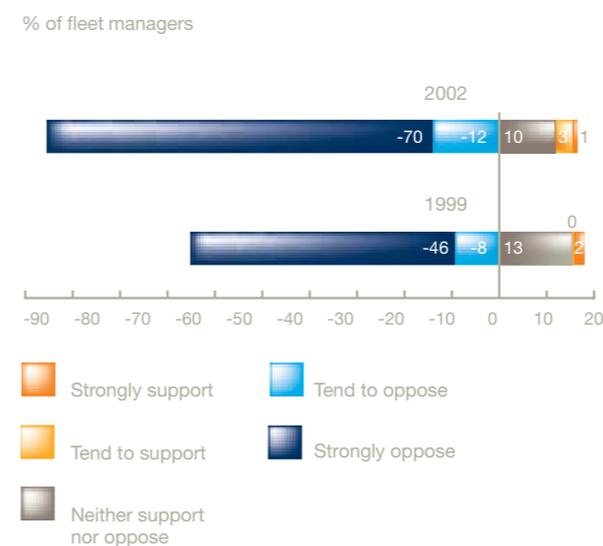
More than 9 in 10 companies offer their employees free parking at work and 4 in 10 of these would continue to provide these free parking spaces even if a tax were imposed.

Transport 2000 understands the need for some employees to travel to work by car but also believes that companies gain benefits by encouraging alternative means of travel to work. Stephen Joseph, Director, says: "The travel plan process should be a fundamental part of a company's overall planning process. Not only will the use of alternative methods of travel benefit our roads and environment, but lesser or restricted parking will also yield additional developable space for businesses."

However, the research highlights that if parking taxes were introduced only 1 in 10 companies would place restrictions on who could park at work and 1 in 10 would impose a charge on employees for parking on the premises.

Previous research shows that even if such charges were imposed the ultimate result may not necessarily be the desired one. In 1996, when motorists were asked how they would travel to work if they had to pay for parking, 2 in 3 motorists said they would still drive. Similarly when the issue was examined in 1998, there was a general feeling among motorists that such a tax would only push parking into nearby residential areas.

Figure 6.1
Opposition toward the levying of taxes on parking spaces



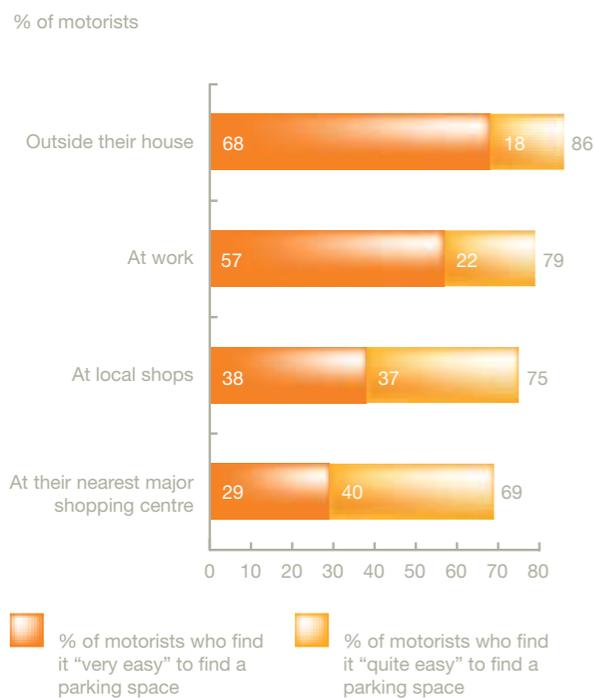
Base: All fleet managers
Source: LVL Report on Company Motoring 1999, RAC Report on Motoring 2003

Private motorists want parking charges reduced

Private motorists are also charged for parking through local authority car parks, parking schemes and parking meters.

While motorists do not have a problem parking in most situations, many (67%) still believe there are too many restrictions on where you can park. This may be in part because of a lack of understanding of the meaning of parking controls – less than half (40%) of motorists say they understand the different rules controlling parking, such as red and yellow lines.

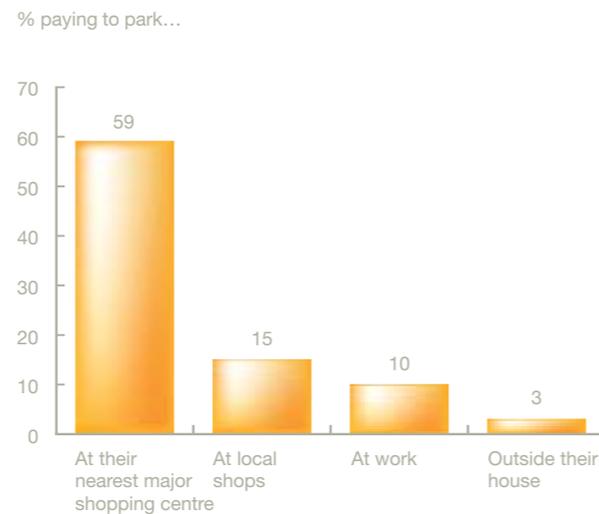
Figure 6.3
The ease of parking



Base: All motorists undertaking each activity
Source: RAC Report on Motoring 2003

The place where motorists are most likely to experience problems is when they go on a major shopping expedition, when just 29% say it is "very easy" to find a space and 40% say it is "quite easy".

Figure 6.4
Parking charges



Base: All motorists undertaking each activity
Source: RAC Report on Motoring 2003

Major shopping trips are also normally the only time when motorists are charged for parking. On average 6 in 10 motorists pay to park when they do a major shop, although in London this rises to 8 in 10 motorists. In contrast, only a minority of motorists have to pay to park at their local shops, near work or outside their home.

Peter Mackie, Professor of Transport Studies at The Institute for Transport Studies, University of Leeds, also shares some concerns about the competitive balance between city centres and out of town developments. "I see parking restrictions as an effective means of controlling the pattern of car use and believe that careful consideration needs to be given to the taxation of parking spaces at out of town retail and business parks. Without this, land-use patterns may become more dispersed and this works against the long term sustainability of the city."

Although, in many situations motorists do not have to pay to park, where parking charges do apply, many motorists feel they are too high. This is particularly true among motorists who have to pay when they park near work – where 6 in 10 believe the charges are too high.

Section 7 Encouragement of car alternatives through increased use of bus lanes

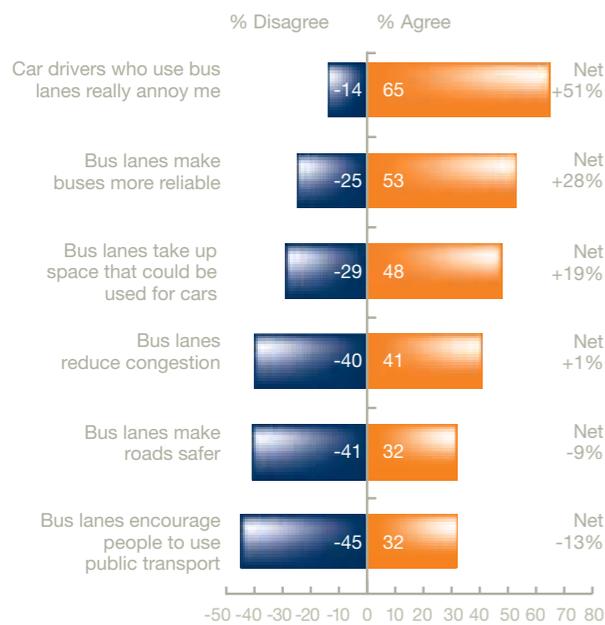
This section of the report examines motorists' attitudes towards the use of bus lanes and the perceived impacts they have on both public transport users and motorists. We also highlight motorists' support towards the increased provision of bus lanes across different roads on the network.



Bus lanes stir high emotions

While many motorists have 'bought in' to the principle of bus lanes – there is a strong net agreement that they improve bus reliability – motorists are less likely to believe that bus lanes help reduce congestion or encourage people to use public transport. This suggests that while the benefits to public transport are recognised, they do not outweigh the disadvantages motorists associate with bus lanes.

Figure 7.1
Attitudes towards bus lanes



Base: All motorists
Source: RAC Report on Motoring 2003

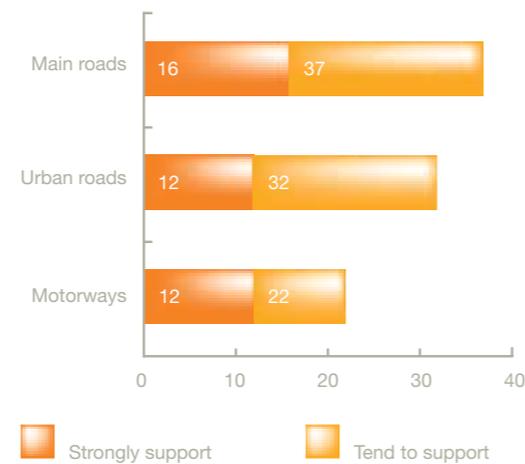
There is also a significant proportion of motorists who are "driven mad" by bus lanes and bus lane behaviour. There is net agreement that they take up space that could be used by cars, with many motorists getting really annoyed by other car drivers who illegally use bus lanes.

Despite these strong feelings toward car drivers who illegally use bus lanes, only a tiny proportion (1%) – equating to 300,000 drivers – admit to often driving in bus lanes. There are, however, 17% of motorists who admit to it sometimes, but, of all offenders, only 2% have ever been fined for driving in a bus lane.

Almost all motorists believe emergency vehicles should be able to use bus lanes, as they are permitted to do, and for 8 in 10 motorists, that this should also extend to breakdown vehicles from organisations such as RAC and the AA. Support is lower for the use of bus lanes by motorcycles – with 4 in 10 supporting this and fewer than 2 in 10 strongly supporting this initiative which has been introduced in some areas.

Figure 7.2
Support for the increased provision of bus lanes

% of motorists who support the increased provision of bus lanes on...



Base: All motorists
Source: RAC Report on Motoring

Looking at how bus lanes could be used as part of a package of measures to contain congestion, around half of motorists support the idea of more bus lanes in urban areas and on main roads but fewer than 1 in 5 strongly support more bus lanes on these roads. Relatively few would support the introduction of bus lanes on motorways, following the introduction of a bus lane on the M4, which, anecdotally, has proved unpopular among some drivers.

Professor Peter Mackie of the Institute for Transport Studies states: "There needs to be a clear appraisal which demonstrates the balance of gains and losses associated with bus lanes, guided busways and signal priorities, taking account of the effects on the network as a whole. Local authorities need to be able to demonstrate that the travel time and reliability gains to public transport users outweigh the losses to car users. In corridors with a bus every 3 to 5 minutes, schemes can be justified and are much more cost effective than high profile tram schemes."

Appendices



Appendix 1

Research methodology

Basis of the research

The RAC Report on Motoring 2003: Making the Most of Britain's Roads, presents the analysis of two quantitative surveys conducted by Sample Surveys Limited and Swift Research Limited on behalf of RAC Motoring Services.

For the main drivers' survey, Sample Surveys interviewed 1,000 regular drivers (defined as driving at least once a month) face to face at home between 4 October 2002 and 25 October 2002 in 100 constituency points in Great Britain. The sample included a boosted total of 250 company car drivers.

The data have been weighted to reflect the actual GB incidence of a company car drivers (whose car is provided by the company), b those who drive a car bought as business expense 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.

For the fleet managers' survey, Swift Research Limited interviewed 250 fleet managers with responsibility for fleets of ten or more cars, over the telephone between 1 October 2002 and 16 October 2002. Quotas were set to ensure the views of different sized fleets were adequately represented. These results were compared with previous surveys conducted for The Lex Vehicle Leasing Reports on Company Motoring. These previous results were weighted to give comparable results.

It should be noted that the title of this report is 'The RAC Report on Motoring 2003: Making the Most of Britain's Roads'. Up until 1999, the reports were called 'The Lex Reports on Motoring' and from 2000 as 'The RAC Reports on Motoring'. Despite these name changes, 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
1,000	+/-2	+/-3
800	+/-2	+/-3
600	+/-2	+/-4
400	+/-3	+/-5
200	+/-4	+/-7
100	+/-5	+/-10

For example, from a sample of 1,000, if 50% answered in a particular way, we would be 95% confident that the true range is between 47% and 53%.

Appendix 2

Sources

Transport Statistics Great Britain 2002
Department for Transport (DfT)

Government Office for the South East
www.go-se.gov.uk

Transport for London
www.tfl.gov.uk

HM Treasury
www.hm-treasury.gov.uk

Highways Agency
www.highways.gov.uk

The Street Works (Recovery of Costs) (England) Regulations 2002
Statutory Instrument 2002 No. 2091

Motoring towards 2050
RAC Foundation
London, 2002

Lex Report on Motoring 1989-1999
Lex Service PLC, London

RAC Report on Motoring 2000-2002
RAC Motoring Services, Feltham, Middlesex

Lex Vehicle Leasing Report on Company Motoring 1995-2001
Lex Vehicle Leasing, Marlow

Acknowledgments

RAC is grateful to the following motoring experts for their comment and contribution to this report:

Irving Yass, Director of Policy,
London First
1 Hobhouse Court
Suffolk Street
London
SW1Y 4HH

Peter Mackie, Professor of Transport Studies,
Institute for Transport Studies
University of Leeds
LS2 9JT

Sir Trevor Chinn, Vice Chair,
Commission for Integrated Transport
5th Floor
Romney House
Tufton Street
London
SW1P 3RA

Helen Holland, Deputy Leader,
Bristol City Council
Brunel House
St George's Road
Bristol
BS1 5UY

Stephen Joseph, Executive Director,
Transport 2000
The Impact Centre
12-18 Hoxton Street
London
N1 6NG

Tim Matthews, Chief Executive,
Highways Agency
Romney House
43 Marsham Street
London
SW1P 3HW

Jon Walden, Managing Director,
Lex Vehicle Leasing
Globe House
Parkway
Globe Park
Marlow
Buckinghamshire
SL7 1LY

Appendix 3

Index

Further information on some of the issues covered in this report can be found in the following RAC Reports on Motoring. The year in which the issue is covered appears in black followed by the relevant page number in grey.

Causes and delays of congestion	89 70, 91 52, 92 54, 98 34, 00 13, 02 41
Charging for road use	91 82, 94 23, 98 49, 99 39, 00 51, 02 41, 02 47
Dependency on the car	89 19, 90 34, 91 68, 92 48, 92 72, 93 62, 93 66, 94 34, 95 20, 96 17, 96 58, 97 50, 98 12, 98 13, 99 12, 99 32, 00 10, 00 11, 01 10, 01 13, 02 29, 02 30
'Green' travel plans	01 17, 02 52
Hard shoulder running	01 24
Parking	89 30, 91 46, 92 48, 92 50, 97 87, 99 33, 00 13
Problems of congestion and methods of easing it	90 70, 91 84, 92 56, 95 26, 96 38, 98 44, 01 14, 02 14
Road maintenance	89 34, 98 30, 01 35, 02 74
Route planning	90 72, 01 30, 02 46

For information on other issues covered in the RAC Reports on Motoring series please refer to the index in the RAC Motoring Facts.

