

Motoring facts

January 2003

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Motoring Facts

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RAC plc

RAC 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 Lex businesses to supply and maintain all of its non-combatant vehicles.

RAC plc is made up of five business groupings, each serving a different type of customer:

RAC Consumer Services
RAC Consumer Services offers a comprehensive range of individual motoring solutions and provides an exceptional level of support to customers through their motoring lifetime.

For many, our wide range of products and services begins with driving or rider tuition from BSM - the UK's driver training experts. As well as breakdown assistance, our other services include:

- RAC Legal Services, providing legal advice on all motoring matters
- RAC Financial Services, who offer a range of insurance, loans and financing.
- RAC Auto Windscreens, the UK's largest manufacturer and installer of vehicle windscreens
- BSM, the UK's largest and most reputable driving school

Other RAC services include our famous Hotels division which offers advice on all aspects of travel - from providing holiday travel insurance to recommending the best hotel in town - and RAC's expert vehicle examiners who offer an impartial opinion when you buy a used car.

RAC Business Solutions
RAC Business Solutions provides a full range of motoring services to corporate clients. Customers include some of the UK's leading passenger car, truck and motorcycle manufacturers, contract hire and leasing companies, vehicle fleets and insurance firms.

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, advanced journey management and accident management services.

We manage complex outsourcing bids for large organisations who would benefit from our businesses working together to provide a comprehensive service. An example is the Ministry of Defense - RAC's largest customer. The MoD procures services from our businesses including Lex Vehicle Leasing, Lex Transfleet, Lex Multipart Defence, BSM, RAC Software Solutions and RAC Consumer Services.

Lex Vehicle Leasing
Lex Vehicle Leasing is the UK's leading car and van contract hire company. It provides company car fleets for businesses of all sizes, together with personal leasing and employee car ownership schemes.

LVL has won a number of industry awards for the quality of its products and services. The company leads its industry in environmental initiatives and plays an active role in helping customers manage the environmental impact of their fleets. Lex Vehicle Leasing is a joint venture with HBOS plc.

Lex Industrial Solutions
Lex industrial Solutions is made up of two businesses, Lex Mechanical Handling which provides contract hire, maintenance and fleet management services for forklift trucks and industrial equipment and Lex Transfleet which offers fleet management, rental and contract hire and driver management of trucks and vans for customers ranging from Securicor to Initial Citylink.

Manufacturer Support Services
These businesses specialise in managing close relationships with vehicle manufacturers.

Lex Autologistics provides purchasing, inventory management, warehousing and distribution services to automotive clients. Lex Multipart Solutions, including Lex Multipart Defence, promotes these services to users of parts such as the MoD and insurance companies.

Multipart Universal stores and supplies all-makes of parts for commercial vehicles

Hyundai (UK) Ltd is the official importer and distributor of Hyundai vehicles. Isuzu Truck is likewise the sole importer of Isuzu trucks to the UK

Lex Commercials is the largest truck dealership group in the UK with 23 truck and van dealerships.

RAC Public Affairs
RAC's Public Affairs team spearheads campaigns on behalf of RAC Motoring Services and develops advice and guidance on responsible motoring for our members. Our corporate social responsibility projects include the hugely successful Grass Routes programme, which challenges students to develop safer ways of travelling to and from school.

For more information about RAC Motoring Services visit www.rac.co.uk

For more information about RAC plc visit www.racplc.co.uk

For further information about any aspect of this report please contact the RAC Press Office on 020 8917 2742.

Foreword by Andy Harrison,
Chief Executive, RAC plc

Combining in-depth research and insightful analysis, the RAC Report on Motoring is an essential guide for all those with an interest in roads, cars, drivers and driving in Britain today. Now in its 15th year, it offers a compelling account of the current state of the country's transport infrastructure and, crucially, how motorists themselves are faring behind the wheel.

Rather than producing a single volume as in previous editions, we have split this year's report into a series of individual studies, a decision which allows us to focus in much more detail on the most important issues facing the UK motorists

This report, RAC Motoring Facts, is a comprehensive summary of the key motoring-related data. The figures starkly illustrate the huge changes that have affected us all over that time. Charting our increasing road capacity being outstripped by car numbers, the new demographics of today's driver, changes to journey patterns and driver behaviour, the report leaves no doubt as to the central role of the car in society today.

It is one of a trio of studies issued in January. Making the Most of Britain's Roads reveals that motorists are more dependent than ever on their cars, but they recognise that congestion is an intractable problem that needs to be effectively managed rather than eliminated. Even so they are extremely unhappy about the state of many roads on which they travel. Journey planning is playing an increasing role in their lives as they seek to avoid the worst of the ongoing traffic problems.

Driving on Company Business covers issues specifically affecting the 11 million people for whom driving is part of their job. It highlights the increasing, and very welcome, prominence of work-related road

safety among fleet managers but points out that one major issue is not just the safety of the 'traditional' company car driver, but the safety of staff driving their private cars on company business. Driver training continues to be the exemption rather than the rule which may explain that, while most business drivers believe they are 'good drivers' they also admit to poor driving practices and low concentration.

These reports make clear that today, more than ever, it is vital for RAC to champion the interests of motorists. But this cannot simply mean rehearsing the familiar arguments of the past. As we encounter the continuing challenges of driving in 2003 we face increasingly difficult choices to ensure that we can still enjoy motoring and stay mobile for years to come. With our programme of research as its foundation RAC will remain at the forefront of these important debates.

My thanks to the RAC project team led by Harry Mirpuri, Ann Skey and Rebecca Bell and to Market Dynamics and RAC Design for producing the report. I am also grateful to Sample Surveys and Swift Research for conducting the studies and to David Leibling, who provided valuable editorial input.

I hope you find the report useful.

Andy Harrison

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Key motoring facts

- Overall levels of car traffic and the numbers of cars on the road have increased tenfold since 1955
- Road traffic has increased by 15% since 1991
- The car is the most dominant vehicle on the road, accounting for 81 % of vehicle kilometres travelled on British roads each year and 85% of all passenger kilometres (across all modes)
- In 1955 nearly a fifth of road kilometres travelled were by bike compared to less than 1 % in 2001
- Motorways account for 20% of road traffic but make up only 1 % of the road network
- Vehicle taxation has increased by £10.6 billion since 1996, while investment on the road infrastructure has fallen by £1.6 billion over the same period
- For every £1.00 raised in tax through vehicle and fuel taxation in the UK, 16p is spent on the roads
- The highest growth in traffic since the war occurred during the 1950s, when traffic grew by 110%, compared with 15% in the 1990s
- According to the CBI, traffic delays cost the country around £15 billion per year
- The first UK motorway was opened in 1958 - there are now 3,500 kilometres of motorway throughout the UK
- The first parking meters appeared in London in 1958
- The car’s stature in popular culture is reflected in the fact that it has appeared in the lyrics of well over 100 hits – from the Beach Boy’s T-Bird to Prince’s Little Red Corvette

1.1 The road network

Chart 1.1.1
Road length in Great Britain by road type: 1951-2000

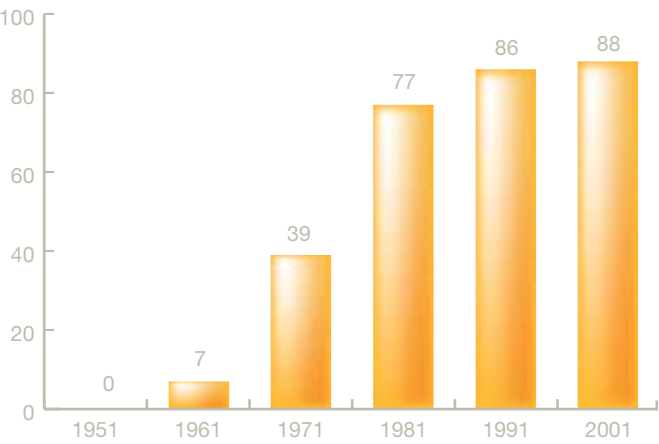
	Kilometres				
	Motorways	Major roads ¹	Minor roads ²	Unclassified	All
1951	n/a	44,710	106,827	145,929	297,466
1961	219	45,189	107,097	161,667	314,172
1971	1,270	46,135	107,388	169,872	324,665
1981	2,647	46,924	108,630	184,119	342,320
1991	3,102	47,903	111,179	197,783	359,967
2001*	3,472	46,550	114,955	227,431	392,408

¹ Includes trunk, class 1 or principal roads.
² Includes class 2 or B and class 3 or C roads.
*The definitions were changed for 2001 data

Source: Department for Transport (DfT)

Chart 1.1.2
Motorways as a proportion of all roads: 1951-2001

% of all roads

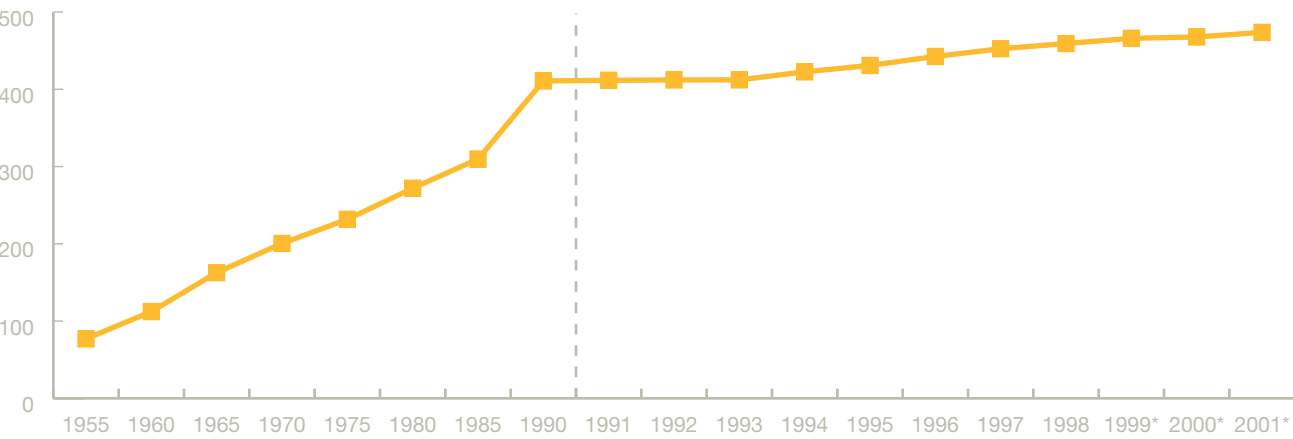


Source: DfT

1.2 Road traffic

Chart 1.2.1
Road traffic in Great Britain: 1955-2001

All motor vehicles (billion vehicle kilometres)



* Figures given on a new basis
Source: DfT

Year	Km/billion
1955	77.0
1960	112.3
1965	162.7
1970	200.5
1975	231.7
1980	271.9
1985	309.7
1990	410.8
1991	411.6
1992	412.1
1993	412.2
1994	422.6
1995	430.9
1996	442.5
1997	452.5
1998	459.2
1999*	466.0
2000*	467.7
2001*	473.7

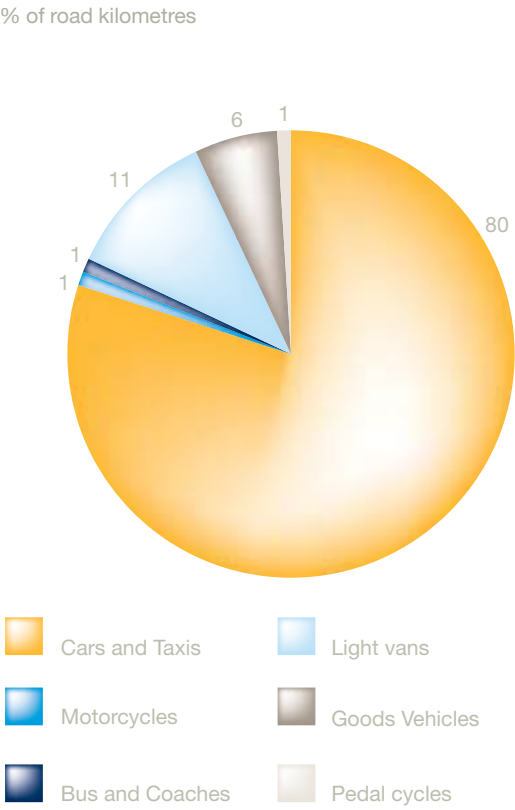
Chart 1.2.2
Road traffic in Great Britain by vehicle type: 1955-2001

	(Billion vehicle kilometres)							
	Cars & Taxis	Motor cycles	Buses & Coaches	Light Vans	Goods Vehicles	All motor Vehicles	Pedal Cycles	Total road traffic
1955	42.3	7.5	4.2	9.8	13.2	77.0	18.2	95.2
1960	68.0	10.0	3.9	15.0	15.3	112.3	12.0	124.3
1965	115.8	6.7	3.9	19.0	17.3	162.7	7.0	169.7
1970	155.0	4.0	3.6	20.3	17.6	200.5	4.4	204.9
1975	181.6	5.1	3.2	23.5	18.3	231.7	4.4	236.1
1980	215.0	7.7	3.5	26.1	19.7	271.9	5.1	277.0
1985	250.5	7.4	3.7	28.6	19.6	309.7	6.1	315.8
1990	335.9	5.6	4.6	39.9	24.9	410.8	5.3	416.1
1991	335.2	5.4	4.8	41.7	24.5	411.6	5.2	416.8
1992	338.0	4.5	4.6	41.2	23.8	412.1	4.7	416.8
1993	338.5	4.1	4.6	41.1	23.8	412.2	4.5	416.7
1994	345.7	4.2	4.7	42.5	25.5	422.6	4.5	427.1
1995	353.2	4.1	4.7	43.8	25.1	430.9	4.5	435.1
1996	362.4	4.2	4.8	45.1	26.0	442.5	4.3	426.8
1997	370.9	4.1	4.9	45.6	27.1	452.5	4.1	456.6
1998	375.6	3.9	4.9	48.1	26.7	459.2	3.9	463.1
1999*	378.4	4.5	5.0	49.4	28.8	466.0	4.1	470.1
2000*	378.7	4.4	4.8	50.5	29.3	467.7	4.0	471.7
2001*	383.7	4.8	4.9	51.1	29.2	473.7	4.0	477.7

* Figures given on a new basis.

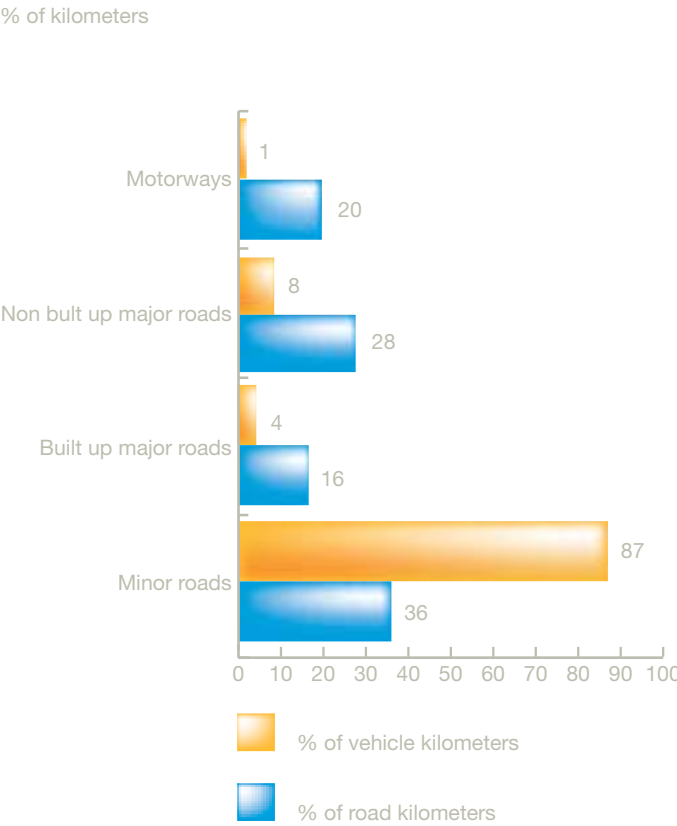
Source: DfT

Chart 1.2.3
Road traffic in Great Britain by vehicle type: 2001



Source: DfT

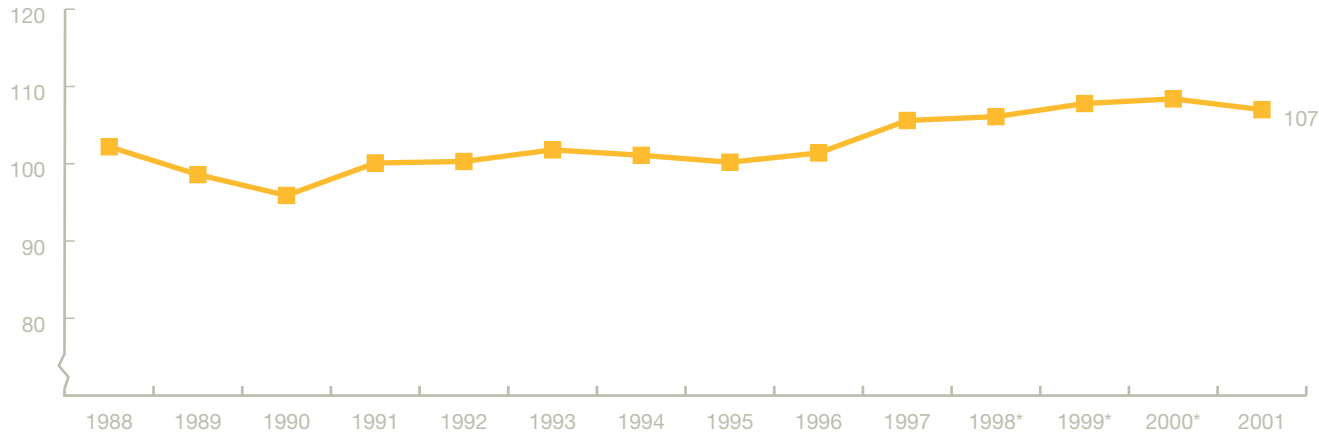
Chart 1.2.4
Road traffic in Great Britain by road class: 2001



Source: DfT

Chart 1.2.5
Defects index of road condition for England and Wales: 1988–2001

All roads** (Index 100 = 1977)
(Note: Any increase indicates deterioration in road condition.)

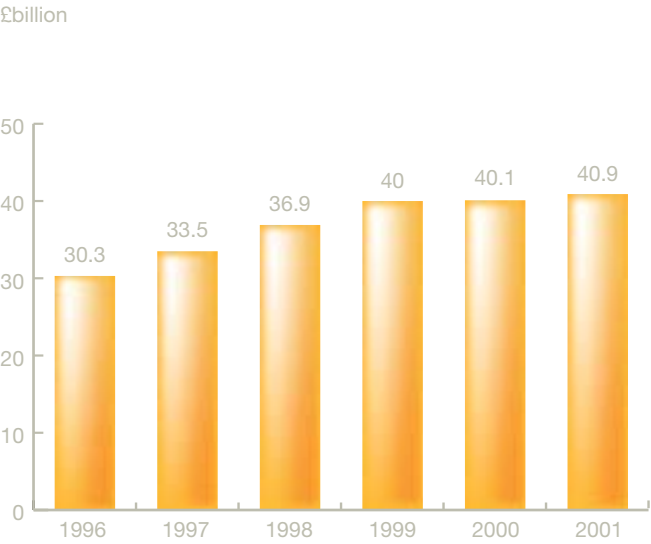


* Figures have been revised to reflect a new reporting methodology, which includes estimates for non-responding authorities and trunk road agents.

** Excludes motorways.

1.3 Road revenues and expenditure

Chart 1.3.1
Annual vehicle taxation*: 1996-2001



* All taxes on cars and commercial vehicles including fuel excise tax, VED, company car taxes, VAT and other taxes.
Source: DVLA / HM Customs and Excise / Inland Revenue

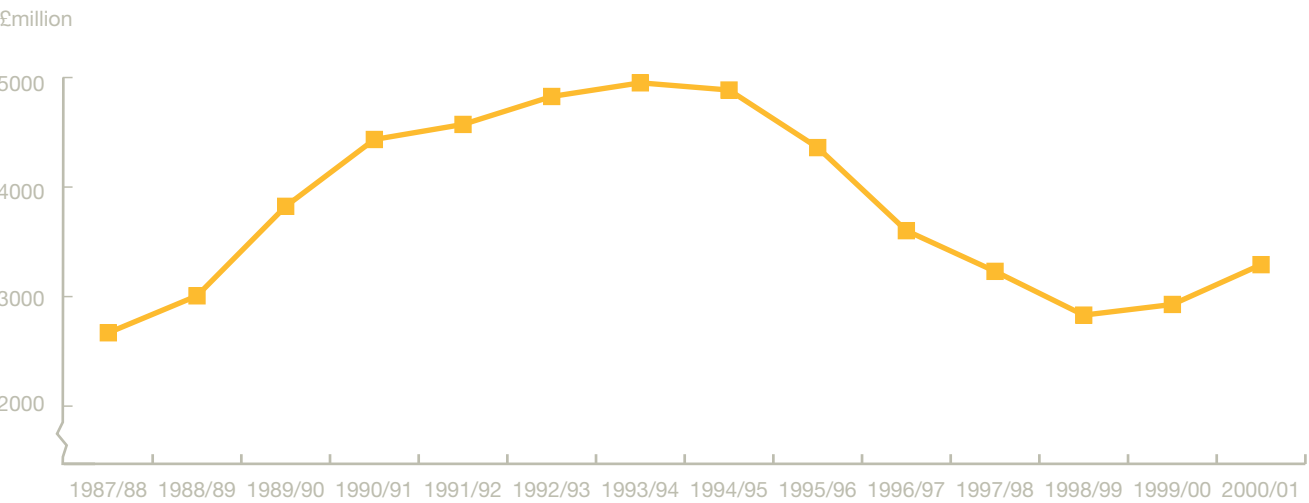
Chart 1.3.2
Revenues from vehicle excise duty (VED) and fuel duty: 1997/98-2000/01

	Revenue from VED (£ million)		% change in VED revenue 1997/98-2000/01	Revenue from fuel duty (£ million)		% change in fuel duty 1997/98-2000/01
	1997/98	2000/01		1997/98	2000/01	
Cars, light vans and taxis	3,885	4,305	+11	14,675	17,185	+17
Goods vehicles over 3.5 tonnes	585	820	+40	3,420	3,840	+12
Motorcycles	30	45	+50	60	75	+25
Buses and coaches	25	30	+20	470	545	+16
Other	25	45	+80	620	760	+23
Total	4,550	5,240	+15	19,245	22,405	+16

Note: the data in chart 1.3.1 includes all types of vehicle taxation. In this chart, figures only refer to revenues from vehicle excise duty (VED) and fuel duty.

Source: HM Customs and Excise / DVLA

Chart 1.3.3
Public investment in road infrastructure in Great Britain*: 1987/88-2000/01



* Includes capital investment only e.g. for new roads and major repair work. Excludes local authority capital expenditure on car parks.
Source: Highways Agency / Local authority returns / Returns from Design, Build, Finance and Operate (DBFO) contractors

Year	£ million
1987/88	2,790
1988/89	3,077
1989/90	3,772
1990/91	4,291
1991/92	4,408
1992/93	4,625
1993/94	4,731
1994/95	4,675
1995/96	4,228
1996/97	3,583
1997/98	3,267
1998/99	2,927
1999/00	3,010
2000/01	3,319

Section 2

Car ownership patterns in the UK

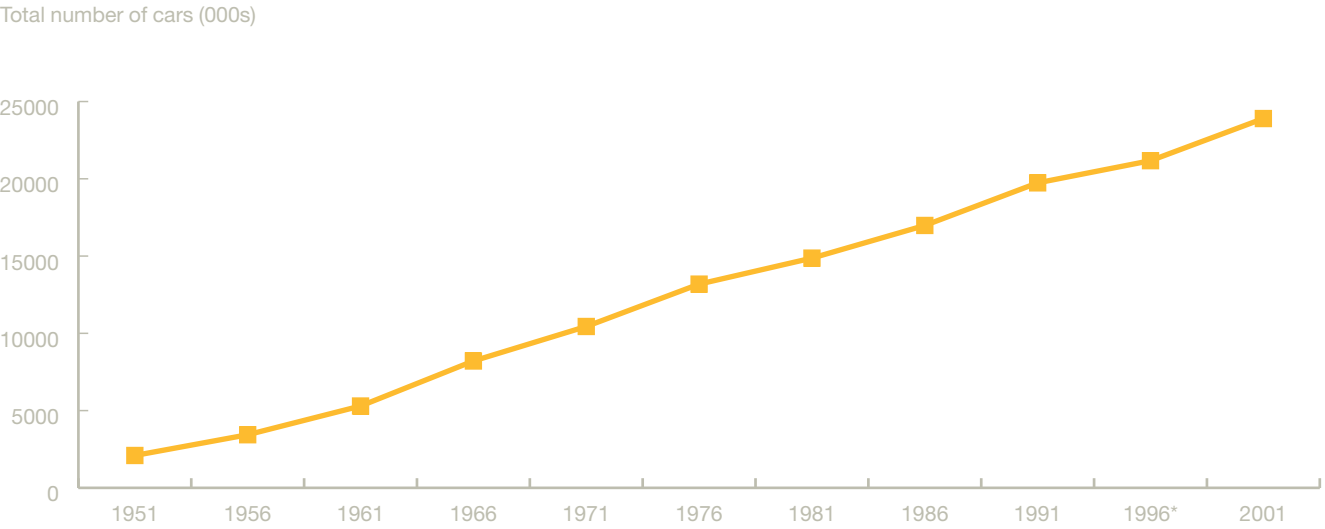
2.1	The number of cars on the road
Chart 2.1.1	The number of privately licensed cars on Great Britain's roads: 1950-2001
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Chart 2.3.4	Car ownership in households in Great Britain: 1988-2002
Chart 2.3.5	Car ownership by income group: 2000/01
Chart 2.3.6	Average length of private and company car ownership: 1989-2002

Key motoring facts

- There are 24 million privately licensed cars on Britain’s roads and an estimated 1 million unlicensed cars.
- In 1950 there were 2 million cars on Britain’s roads.
- The number of cars on Great Britain’s roads has increased by 30% since 1988 – the year of the first Lex Report on Motoring.
- There are 5.5 million cars on the road that are over nine years old.
- Nearly 2.5 million new car sales were registered in 2001 an increase of 54% on the number sold in 1991.
- Company cars account for nearly half of all new cars sold.
- 74% of households have at least one car. There are 1.1 cars in the average household.
- 46% of households have access to one car, 22% to 2 cars and 5% to 3 or more.
- Whilst 21% of those households in the bottom tenth of households by income band have access to a car, 21% of those in the top household income decile have access to at least three cars.
- Sales in the ‘Mini’ segment increased by 232% between 1997 and 2001, while sales in the ‘Luxury Saloon’ segment decreased by 42% over the same period.
- The average number of years that cars are kept for has increased from 3.7 years in 1989 to 4.5 years in 2001.
- Consumers spent £25 billion on buying cars in 2001 – this compares with £23 billion on going to pubs, £20 billion on overseas tourism and just £0.4 billion on Coca-Cola.

2.1 The number of cars on the road

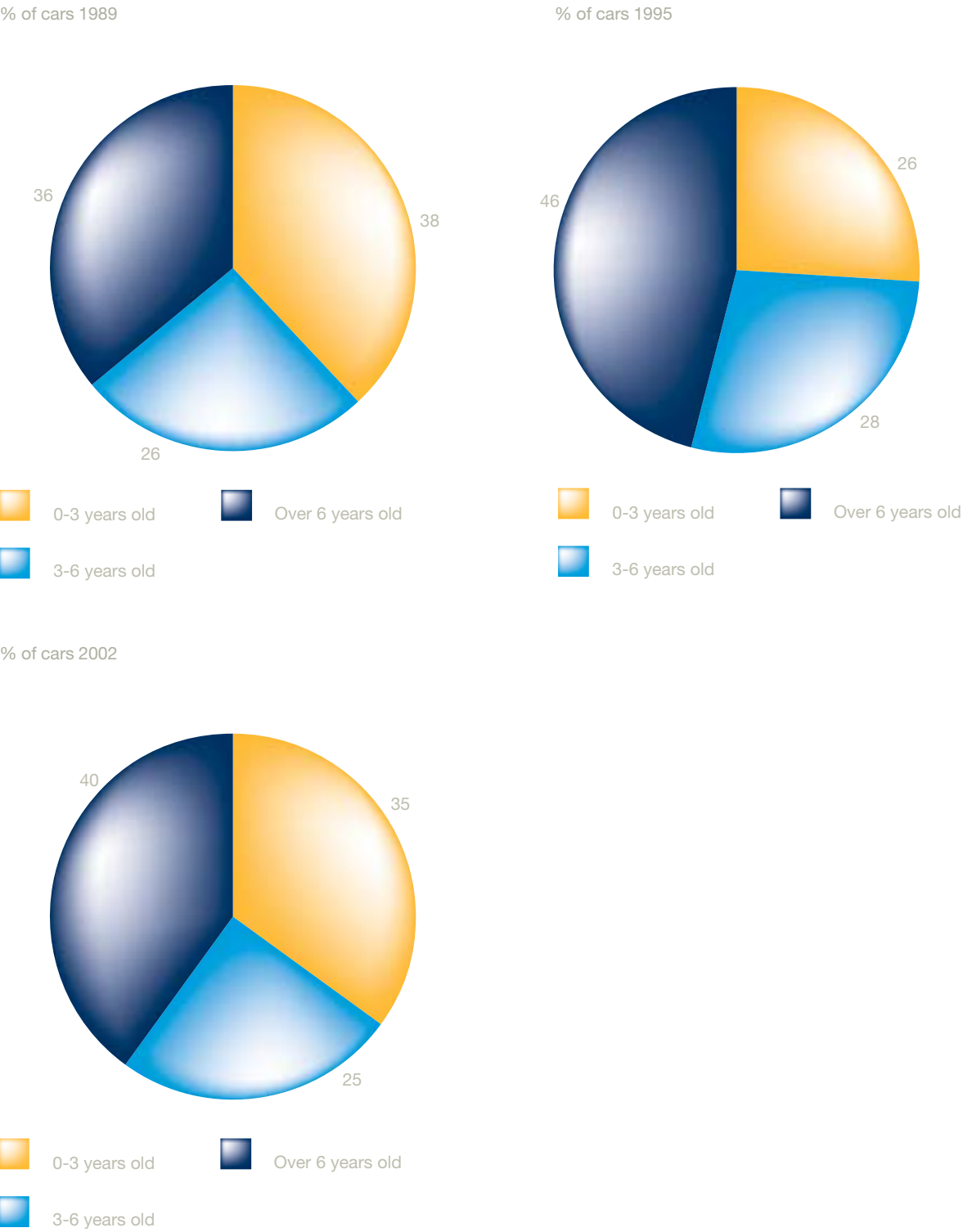
Chart 2.1.1
The number of privately licensed cars on Great Britain’s roads: 1951-2001



* New methods of estimating vehicle stock were introduced in 1992.
Source: DfT

Year	Total number of cars (000s)
1951	2,095
1956	3,437
1961	5,296
1966	8,210
1971	10,443
1976	13,184
1981	14,867
1986	16,981
1991	19,737
1996*	21,172
2001	23,899

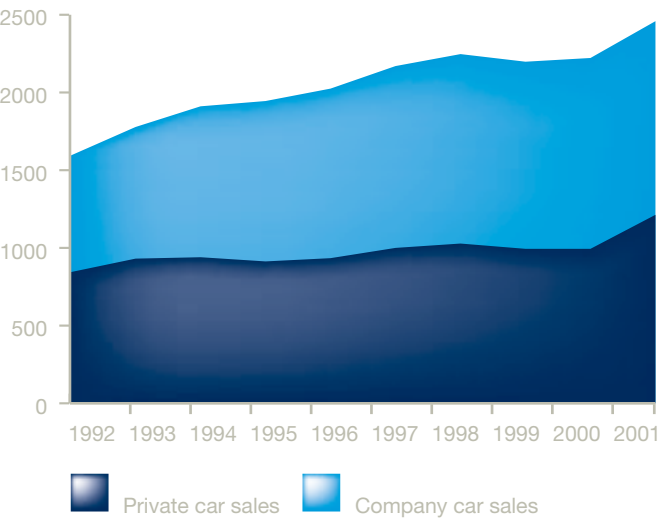
Chart 2.1.2
The age profile of Britain’s cars: 1989–2002



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

2.2 Car sales

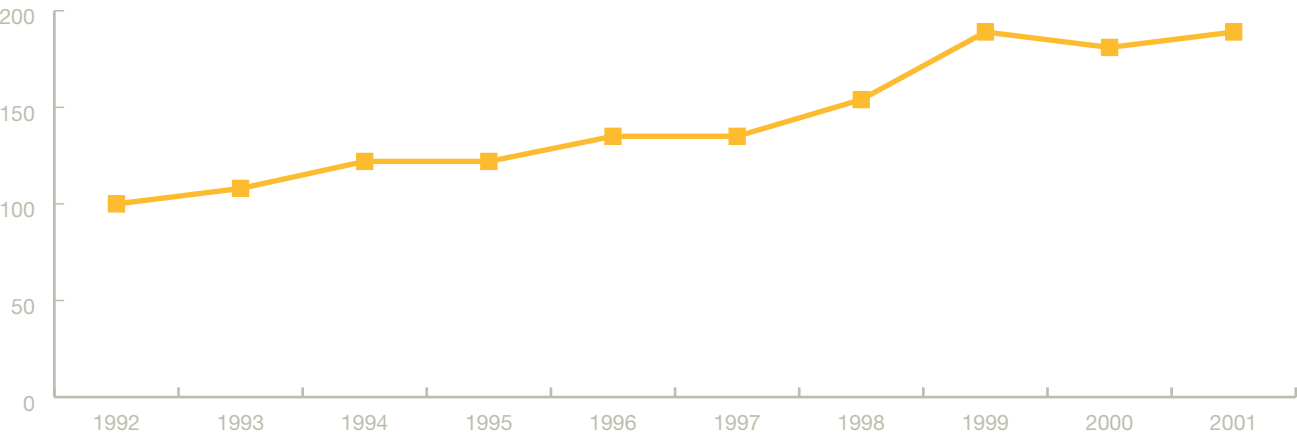
Chart 2.2.1
New car sales: 1992–2001



Source: Society of Motor Manufacturers Trader (SMMT) / Lex Vehicle Leasing (LVL)

Chart 2.2.2
Used car sales: 1992–2001

Used car sales (index 100 = 1992)



Base: All motorists
Source: Derived from Lex / RAC Report on Motoring data

Year Used car sales (index 100=1992)

1992	100
1993	108
1994	122
1995	122
1996	135
1997	135
1998	154
1999	189
2000	181
2001	189

Chart 2.2.3
New car sales by car segment: 1997-2001

	1997	1998	000s 1999	2000	2001	% change 1997-2001
Mini	14	24	40	52	48	+232
Supermini	576	568	594	689	734	+28
Lower Medium	704	751	704	662	742	+5
Upper Medium	546	550	513	477	508	-8
Executive	125	124	116	105	109	-14
Luxury Saloon	16	17	12	11	11	-42
Specialist Sports	64	68	69	67	65	+3
Dual Purpose	82	99	99	99	122	+49
MPV	44	48	52	60	80	+80

Source: SMMT

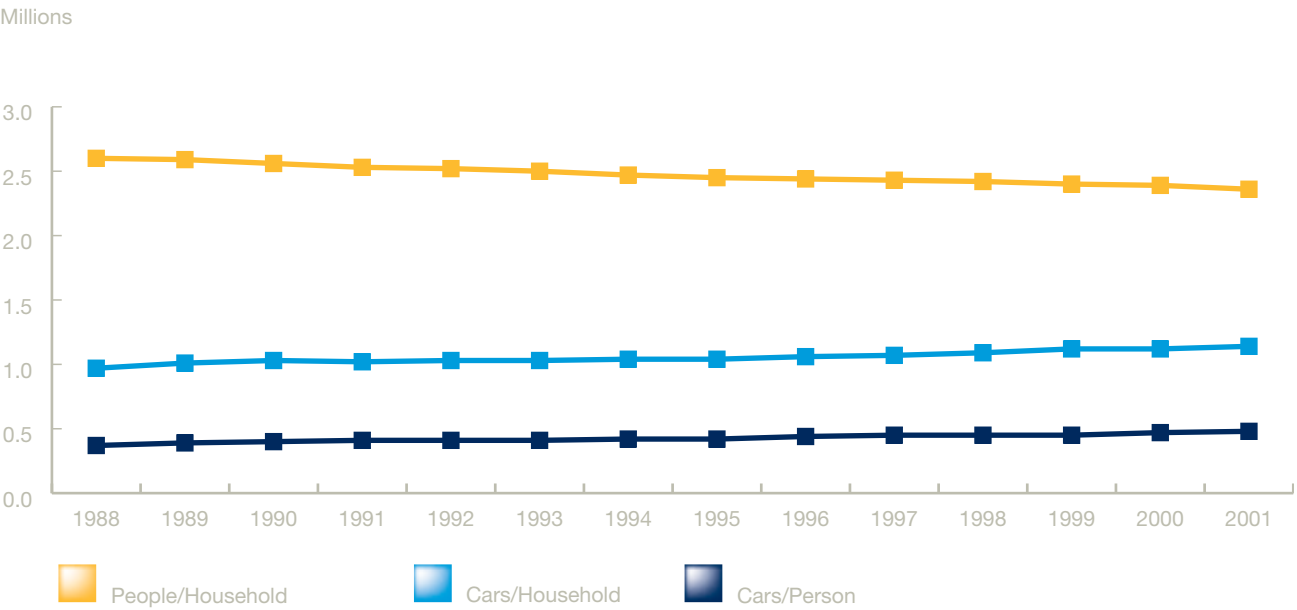
Chart 2.2.4
Top 10 selling cars in the UK: 1997-2001

1997	1998	1999	2000	2001
Ford Fiesta	Ford Fiesta	Ford Focus	Ford Focus	Ford Focus
Ford Escort	Ford Escort	Ford Fiesta	Vauxhall Astra	Vauxhall Astra
Ford Mondeo	Ford Mondeo	Vauxhall Astra	Ford Fiesta	Ford Fiesta
Vauxhall Vectra	Vauxhall Vectra	Vauxhall Corsa	Vauxhall Corsa	Peugeot 206
Vauxhall Astra	Renault Mègane	Vauxhall Vectra	Peugeot 206	Vauxhall Corsa
Vauxhall Corsa	Vauxhall Astra	Ford Mondeo	Vauxhall Vectra	Ford Mondeo
Peugeot 306	Vauxhall Corsa	Renault Mègane	Ford Mondeo	Renault Clio
Rover 200 Series	Peugeot 306	Renault Clio	Renault Mègane	Renault Megane
Rover 400 Series	Rover 200 Series	Volkswagen Golf	Renault Clio	Volkswagen Golf
Renault Clio	Rover 400 Series	Peugeot 206	Volkswagen Golf	Citroen Xsara

Source: SMMT

2.3 Car ownership

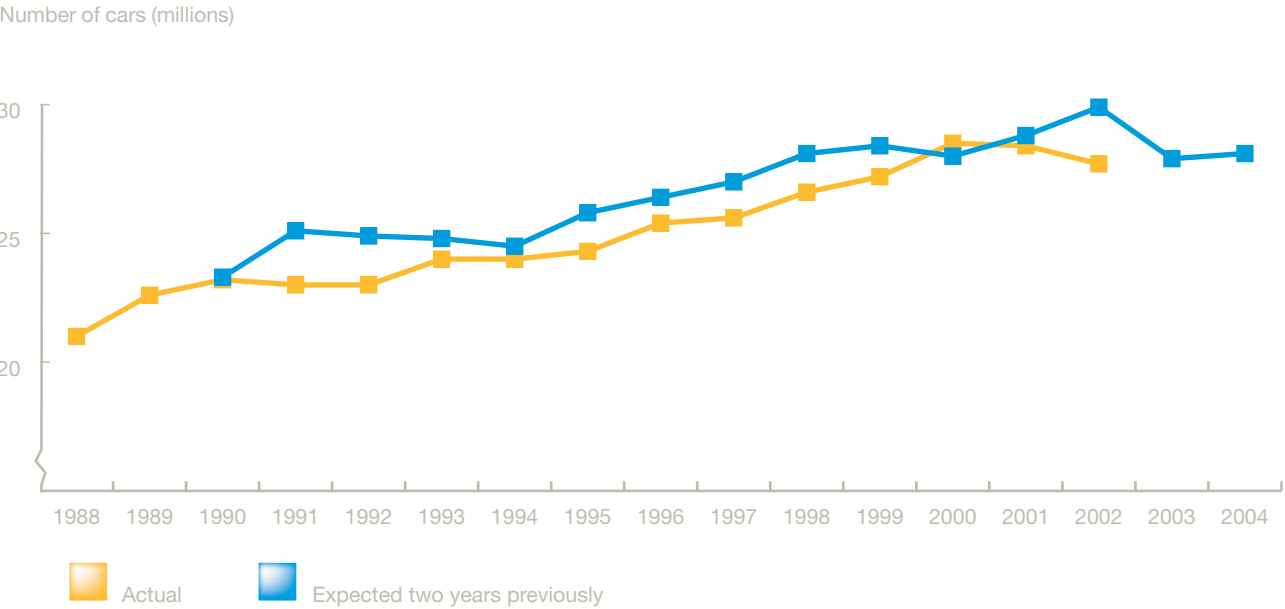
Chart 2.3.1
Car ownership in the UK: 1988-2001



Source: SMMT / Family Expenditure Survey (FES) / Social Trends 2002 / Market Dynamics

Millions	People/Household	Cars/Household	Cars/Person
1988	2.60	0.97	0.37
1989	2.59	1.01	0.39
1990	2.57	1.03	0.40
1991	2.54	1.02	0.40
1992	2.52	1.03	0.41
1993	2.49	1.03	0.41
1994	2.46	1.04	0.42
1995	2.44	1.04	0.43
1996	2.42	1.06	0.44
1997	2.40	1.08	0.45
1998	2.39	1.10	0.46
1999	2.37	1.11	0.47
2000	2.36	1.12	0.48
2001	2.34	1.14	0.49

Chart 2.3.2
Current and future car ownership: 1988-2004



Base: All motorists
Source: Lex / RAC Report on Motoring/Experian Business Solutions.

Number of cars (millions)		
	Actual	Expected two years previously
1988	21.1	
1989	22.1	
1990	23.0	23.5
1991	23.0	25.4
1992	23.3	25.0
1993	23.6	25.0
1994	23.9	24.7
1995	24.4	26.0
1996	24.7	25.7
1997	25.0	26.3
1998	25.9	27.5
1999	26.5	27.8
2000	28.0	27.4
2001	28.2	28.6
2002	28.3	29.7
2003		27.8
2004		27.9

Chart 2.3.3
Grossed up estimates of number of cars in Britain at time of surveys and expectations in two years' time: 1988-2004

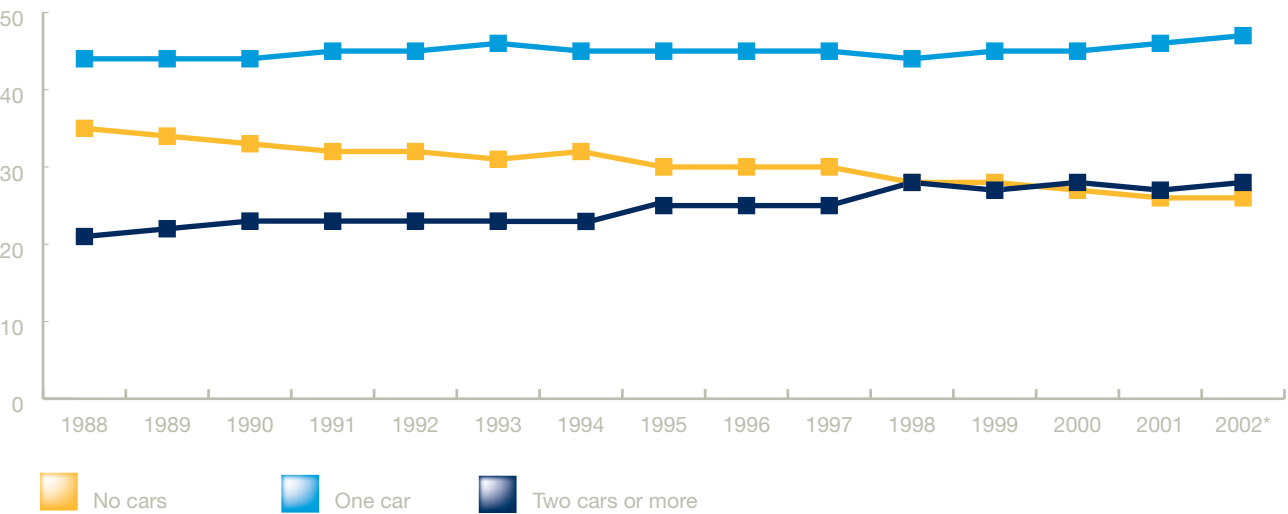
Expectation in two years' time						
	Households in GB (m)	Households with cars (%)	Avg. cars per household	Grossed up no. of cars (m)	Year of expectation	Grossed up no. of cars (m)
1988	21.7	66.0	1.47	21.1	1990	23.5
1989	21.9	66.0	1.53	22.1	1991	25.4
1990	22.1	67.0	1.55	23.0	1992	25.0
1991	22.4	68.0	1.51	23.0	1993	25.0
1992	22.6	67.8	1.52	23.3	1994	24.7
1993	22.9	68.6	1.50	23.6	1995	26.0
1994	23.1	69.0	1.50	23.9	1996	25.7
1995	23.3	69.7	1.50	24.4	1997	26.3
1996	23.5	69.7	1.51	24.7	1998	27.5
1997	23.7	69.8	1.51	25.0	1999	27.8
1998	23.9	71.8	1.51	25.9	2000	27.4
1999	24.1	72.0	1.53	26.5	2001	28.6
2000	24.4	73.0	1.57	28.0	2002	29.7
2001	24.6	74.0	1.55	28.2	2003	27.8
2002	24.8°	74.0°	1.54	28.3	2004	27.9
2003	25.0°	74.0°				
2004	25.1°	74.0°				

e: Estimate
Base: All motorists

Source: Lex / RAC Report on Motoring / General Household Survey (GHS)

Chart 2.3.4
Car ownership in households in Great Britain: 1988-2002

% of car owning households



* Estimates
Source: FES / NTS / GHS / Market Dynamics

% of car owning households

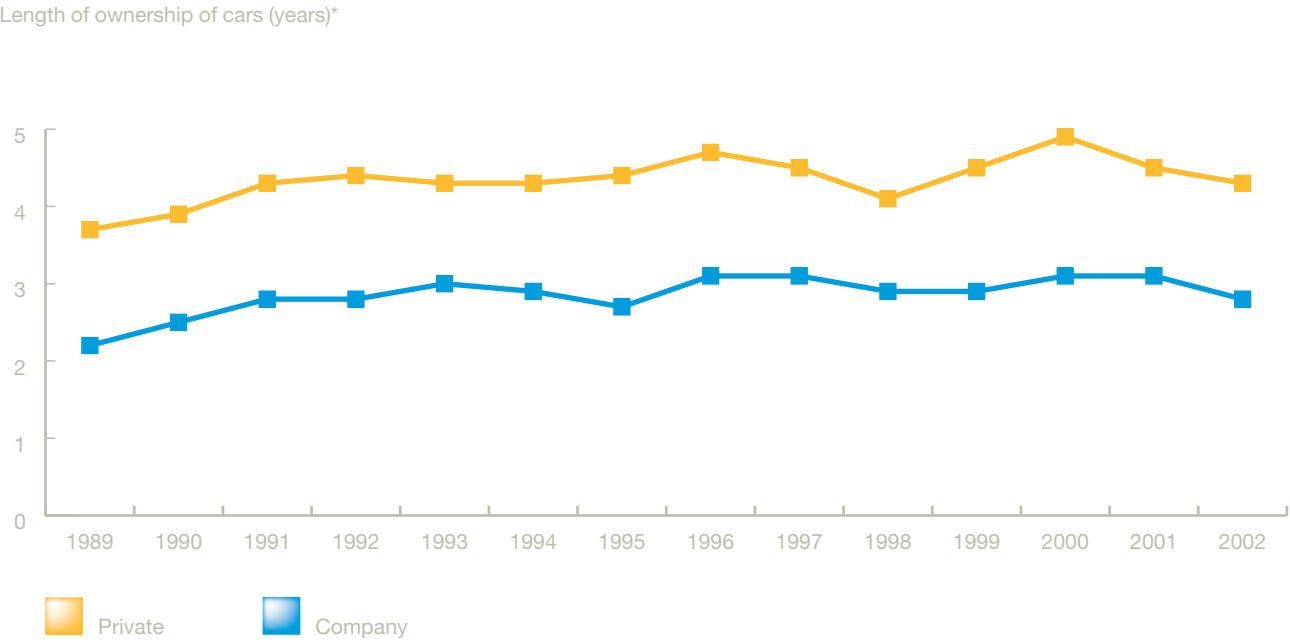
	No cars	One car	Two cars or more
1988	35	44	21
1989	34	44	22
1990	33	44	23
1991	32	45	23
1992	32	45	23
1993	31	46	23
1994	32	45	23
1995	30	45	25
1996	30	45	25
1997	30	45	25
1998	28	44	28
1999	28	45	27
2000	27	45	28
2001	26	46	27
2002*	26	47	28

Chart 2.3.5
Car ownership by income group: 2000-2001

		% with no car	% with 1 car	% with 2 cars	% with 3+ cars
All households		28	44	22	6
Income bands:					
Lowest decile	1	79	19	2	0
	2	64	33	4	0
	3	45	48	6	1
	4	33	57	10	1
	5	19	66	13	2
	6	16	59	22	4
	7	8	52	31	9
	8	6	47	39	8
	9	6	37	45	12
Highest decile	10	4	25	50	21

Source: Family Expenditure Survey 2000-2001

Chart 2.3.6
Average length of private and company car ownership*: 1989-2002



* Based on the average number of years the car has currently been owned and average number of years it is expected to be kept in the future.

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

Length of ownership of cars (years)*

	Private	Company
1989	3.7	2.2
1990	3.9	2.5
1991	4.3	2.8
1992	4.4	2.8
1993	4.3	3.0
1994	4.3	2.9
1995	4.4	2.7
1996	4.7	3.1
1997	4.5	3.1
1998	4.1	2.9
1999	4.5	2.9
2000	4.9	3.1
2001	4.5	3.1
2002	4.3	2.8

Section 3

A profile of Britain’s car drivers

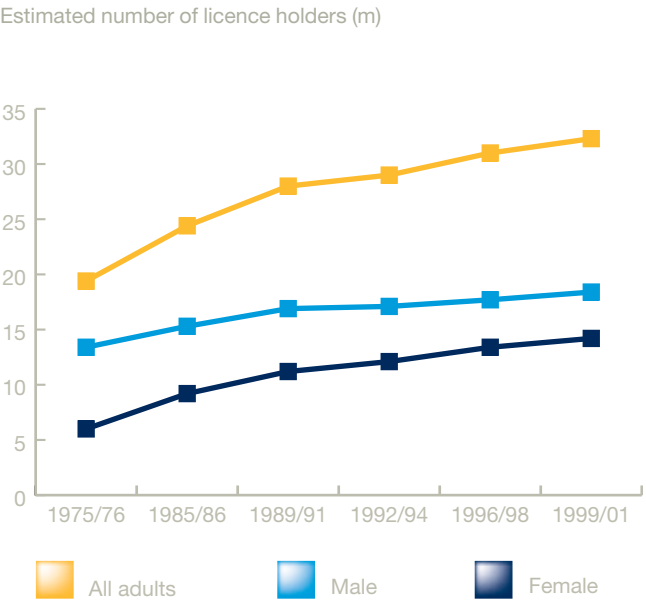
3.1	Car licence holders in Great Britain	
Chart 3.1.1	The number of licence holders: 1975/76-1999/01	
Chart 3.1.2	The number of licence holders by gender and age: 1975/76-1999/01	
Chart 3.1.3	Profile of car drivers with points on their licence: 1999	
3.2	Car driver demographics	
Chart 3.2.1	Profile of car drivers by gender, age and social class: 1989-2002	
Chart 3.2.2	Profile of new and used car buyers: 2002	
Chart 3.2.3	Profile of car drivers by region: 2002	

Key motoring facts

- There were 32.3 million licence holders in the UK in 1999/01. The number of adults holding a driving licence has increased by 66% since 1975/76.
- In 1999/01 women accounted for 43% of driving licence holders compared with 31% in 1975/76.
- In 1999/01, 82% of adult men (aged 17 and over) held full car driving licences but only 60% of women.
- Licence holding has increased rapidly among women, rising by 137% since 1975/76, while the proportion of men holding licences has changed significantly less (37%) over the same period.
- Men in their forties are most likely to have a driving licence - 91% of men aged 40-49 hold a driving licence, The peak age for women is 30-49 - 77% of whom have a driving licence.
- Under a fifth (17%) of car drivers have points on their licences. In 1999, 1 in 5 male drivers had points on their licences compared to 1 in 8 female drivers.
- Company car drivers are more likely than private car drivers to have points on their licences - 28% compared to 16% of private drivers.
- Reflecting the UK’s ageing population, the proportion of young drivers (aged 17-34) has decreased from 37% in 1989 to 23% in 2002 while the number of middle-aged drivers (aged 35-54) has increased from 38% to 44% over the same period.
- 72% of motorists who work commute by car and 55% of those who have children at school take them there by car.
- 6 in 10 car trips are under 5 miles and 1 in 4 under 2 miles.
- 83% of motorists agree with the statement “I would find it very difficult to adjust my lifestyle to being without a car”.

3.1 Car licence holders in Great Britain

Chart 3.1.1
The number of licence holders: 1975/76-1999/01



Source: NTS / FES / GHS

Estimated number of licence holders (m)

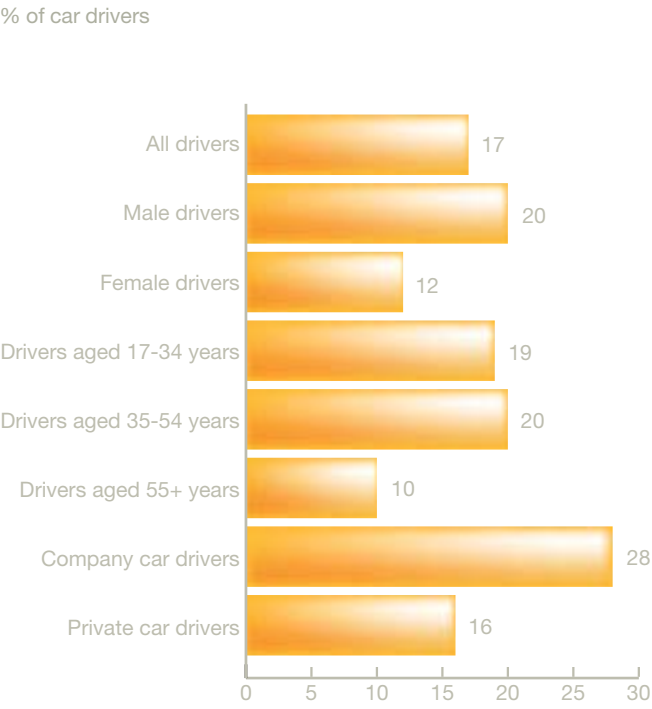
	All adults	Male	Female
1975/76	19.4	13.4	6.0
1985/86	24.4	15.3	9.2
1989/91	28.0	16.9	11.2
1992/94	29.0	17.1	12.1
1996/98	31.0	17.7	13.4
1999/01	32.3	18.4	14.2

Chart 3.1.2
The number of licence holders by gender and age: 1975/76-1999/01

	% of each age band who have a driving licence						
	17-20	21-29	30-39	40-49	50-59	60-69	70 and over
All adults							
1975/1976	28	59	67	60	50	35	15
1999/2001	36	73	83	84	78	71	44
Males							
1975/1976	36	78	85	83	75	58	32
1999/2001	41	81	89	91	88	86	69
Females							
1975/1976	20	43	48	37	24	15	4
1999/2001	31	66	77	77	69	57	25

Source: NTS / FES / GHS

Chart 3.1.3
Profile of car drivers with points on their licence: 1999



Base: All motorists
Source: RAC Report on Motoring 2000

3.1 Car driver demographics

Chart 3.2.1
Profile of car drivers by gender, age and social class: 1989-2002

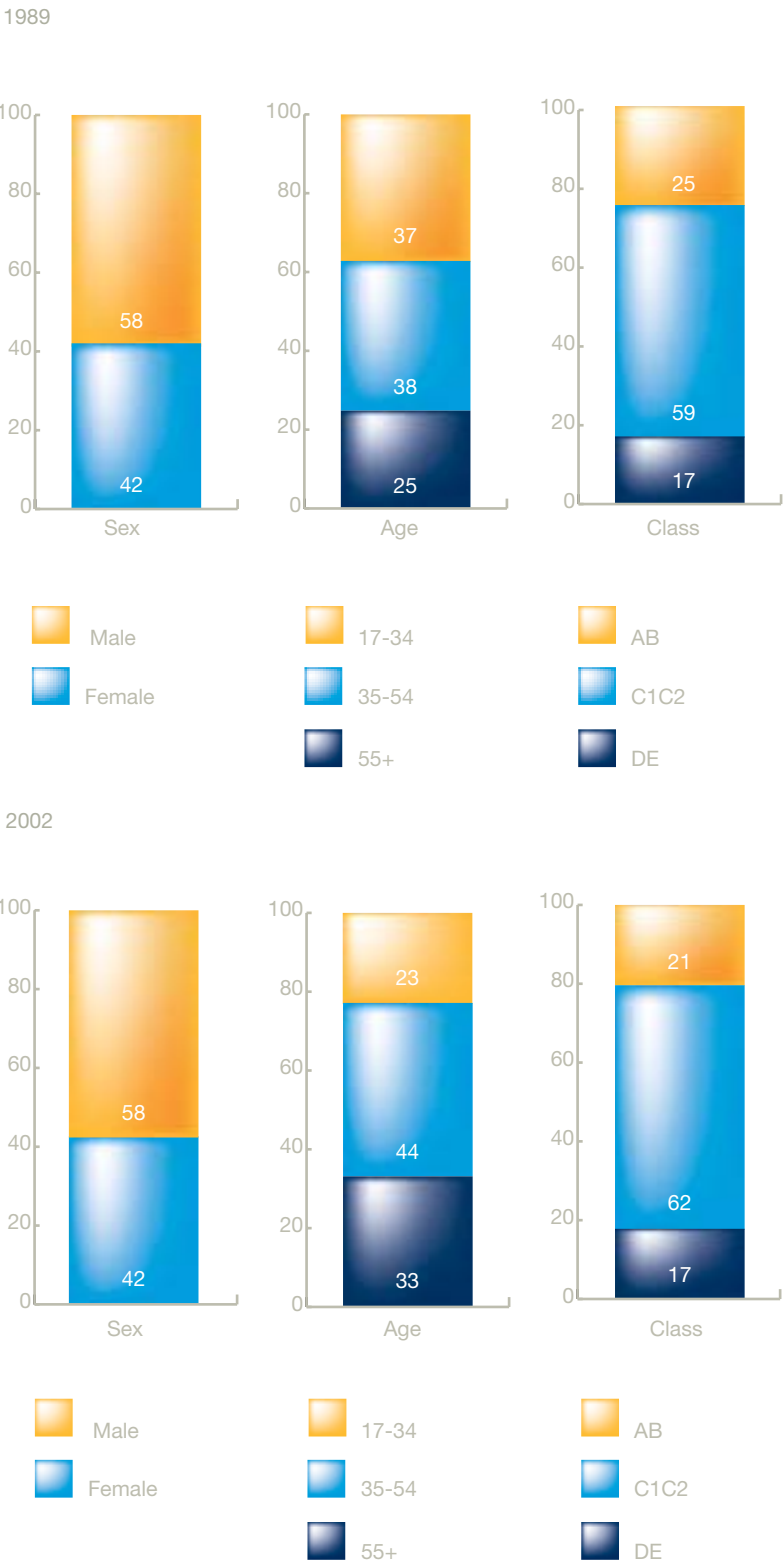


Chart 3.2.2
Profile of new and used car buyers: 2002

		%	
		Used cars	New cars
Sex	Male	56	61
	Female	44	39
Age	17-34	25	18
	35-54	46	42
	55+	29	40

Base: All motorists
Source: RAC Report on Motoring 2002

Chart 3.2.3
Profile of car drivers by region: 2002

Percentage	All	London & South East	SW & Wales	Midlands & East Anglia	North of England	Scotland
No of drivers (m)	32.3	10.3	4.8	6.7	7.8	2.6
Total annual mileage	9,700	10,000	9,900	8,700	9,800	10,300
% of drivers where car was bought from new	32	28	32	31	37	33
% of drivers in households with more than one car	43	48	48	40	43	38
% of drivers who are female	42	40	34	55	39	43
% of drivers who are under 25	6	7	5	5	7	3
% of drivers who are over 65	15	13	21	14	16	9

Base: All motorists
Source: RAC Report on Motoring 2003 / NTS / FES / GHS

Section 4

Journey patterns and driver behaviour

4.1	Travel patterns
Chart 4.1.1	Percentage of passenger transport by mode: 1961-2001
Chart 4.1.2	Change in the number of journeys made per person per year by mode of transport: 1989/91-1999/01
Chart 4.1.3	Annual car mileage per driver: 1990-2002
Chart 4.1.4	Car journeys by type of journey: 1999
4.2	Speed of travel
Chart 4.2.1	Speed limits in the UK: 2001
Chart 4.2.2	Average speed of vehicles by road type and vehicle type: 2001
Chart 4.2.3	Percentage of vehicles exceeding the speed limit by 10mph: 2001
Chart 4.2.4	The effectiveness of speed cameras: 1996-2001
Chart 4.2.5	Speed limit offences: 1989-2000
Chart 4.2.6	Number of breath tests: England and Wales: 1990-2000
4.3	Accidents on the road
Chart 4.3.1	The number of injuries on the road: 1942-2001
Chart 4.3.2	Passenger casualty (killed or seriously injured) rated by mode of transport: 1992-2001
Chart 4.3.3	Accidents involving cars - rates by road class: 2001
Chart 4.3.4	Accident offences in England and Wales: 1989-2000

Key motoring facts

- People are dependent as ever on their cars. While the total number of journeys made (per person, per year) has fallen 7% over 1989/91-1999/01, the number of journeys made by car or van has increased 3%.
- A large percentage of motorists drive over the speed limit, with the majority offending on 30mph roads, closely followed by motorways and dual carriageways.
- The effectiveness of speed cameras, that is the number of drivers who have been flashed and or convicted, has increased from fewer than 4 in 10 in 1996 to half in 2001.
- The number of deaths/serious injuries occurring on all modes of transport, has steadily decreased since 1972, from 7,800 people killed on the UK’s roads to 3,500 in 2001. During this time traffic has more than doubled.
- Road traffic in the UK has risen nearly tenfold since 1950 yet the numbers of deaths or serious injuries has fallen by a quarter.
- Motorbikes have the most deaths/serious injury rates per kilometre driven of all modes of transport - nearly 50 times more dangerous than a car.
- Motorways are the safest roads in the UK, with 18 accidents per 100 million kilometres travelled. The most dangerous roads are those in built up areas with 73 accidents per 100 million kilometres travelled. On average, 9 people are killed and more than 100 seriously injured each day on British roads.
- The Royal Society for the Prevention of Accidents estimates that drivers using a mobile phone are four times more likely to have an accident than drivers who are not.

4.1 Travel patterns

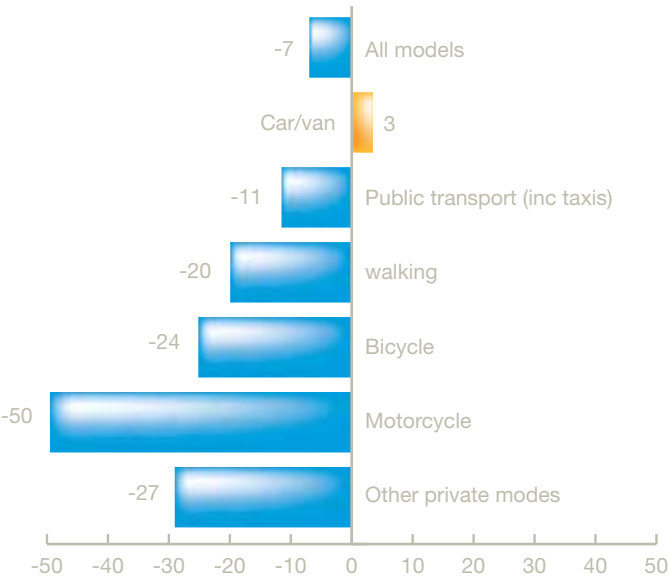
Chart 4.1.1
Percentage of passenger transport by mode: 1961-2001

	Percentage				
	1961	1971	1981	1991	2001
Buses and coaches	26	14	10	6	6
Cars, vans and taxis	53	75	80	86	85
Motor cycles	4	1	2	1	1
Pedal cycles	4	1	1	1	1
All road	86	91	93	94	93
Rail ¹	14	9	7	6	6
Air	0.3	0.5	0.6	0.7	1.0
All modes ²	100	100	100	100	100

¹ Figures relate to financial years and include National Rail, urban metros and modern trains.
² Excluding water travel within the UK (including the Channel Islands), estimated at 0.7bn passenger kilometres in 2000.
Source: NTS / Strategic Rail Authority (SRA) / Civil Aviation Authority (CAA) / DfT

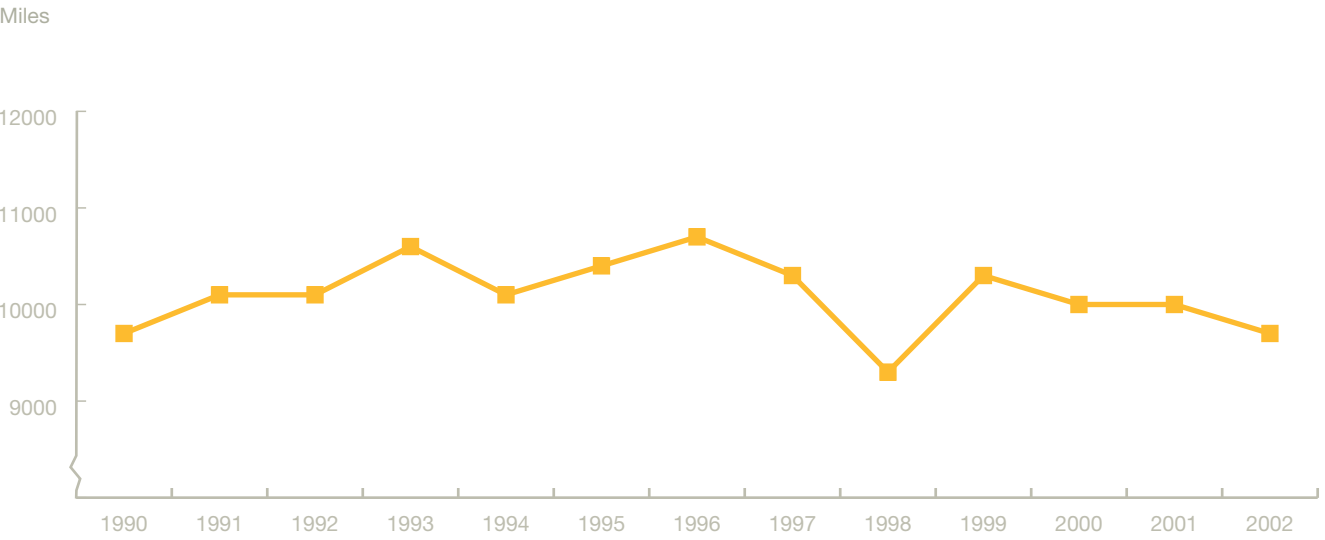
Chart 4.1.2
Change in the number of journeys made per person per year by mode of transport: 1989/91-1999/01

% change in the number of journeys made 1989/91–1999/01



Source: National Travel Survey 1999/01

Chart 4.1.3
Annual car mileage per driver: 1990-2002



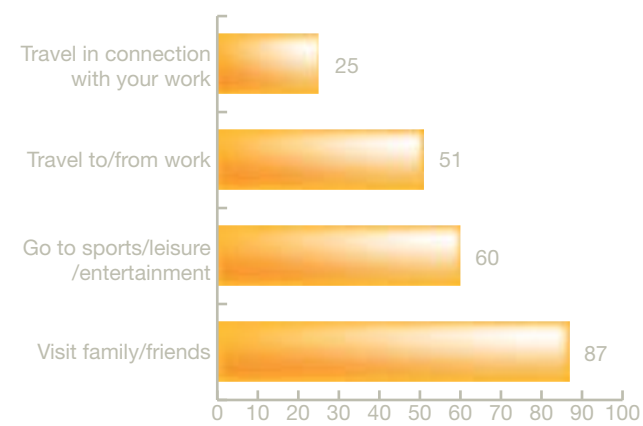
Base: All motorists
Source: Lex / RAC Report on Motoring

Annual car mileage per driver: 1990-2002

	Miles
1990	9,700
1991	10,100
1992	10,100
1993	10,600
1994	10,100
1995	10,400
1996	10,700
1997	10,300
1998	9,300
1999	10,300
2000	10,000
2001	10,000
2002	9,700

Chart 4.1.4
Car journeys by type of journey: 1999

% who uses the car to...



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

4.2 Speed of travel

Chart 4.2.1
Speed limits in the UK: 2001

	Perceived safe limit by motorists for...			Current legal limit for...		
	Cars	Vans	Heavy Goods Vehicles	Cars	Vans	Heavy Goods Vehicles
Main roads in countryside	50	46	42	60/70	50/60	40/50
Main roads in towns	33	32	30	30/40	30/40	30/40
Motorways in fine weather	74	68	59	70	70	60
Motorways in poor weather	53	48	43	70	70	60

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

Chart 4.2.2
Average speed of vehicles by road type and vehicle type: 2001

	MPH				
	Motorcycles	Cars	Light goods	Bus/coaches Vehicles	Articulated Trucks
Motorways	70	70	66	60	54
Dual carriageways	68	70	66	59	54
Single carriageways	55	45	46	41	44
30mph limit roads	33	31	30	28	28
40mph limit roads	37	36	36	31	33

Source: DfT

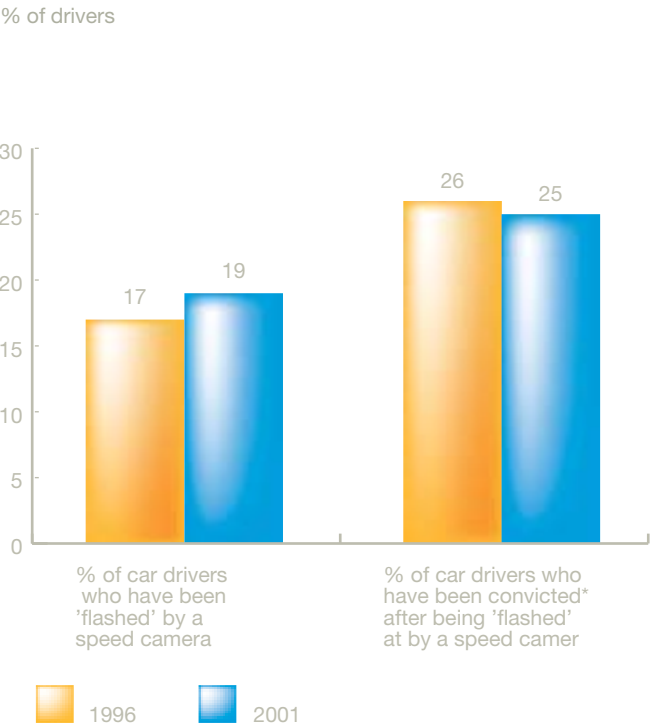
Chart 4.2.3
Percentage of vehicles exceeding the speed limit by 10mph: 2001

	% of vehicles exceeding speed limit by 10mph			
	Motorcycles	Cars	Light goods	Buses/coaches
Motorways	18	18	8	1
Dual carriageways	13	13	6	1
Single carriageways	14	2	1	2

	% of vehicles exceeding speed limit by 5mph			
	Motorcycles	Cars	Light goods	Buses/coaches
Urban roads 30mph limit	35	32	28	11
Urban roads 40mph limit	21	8	5	1

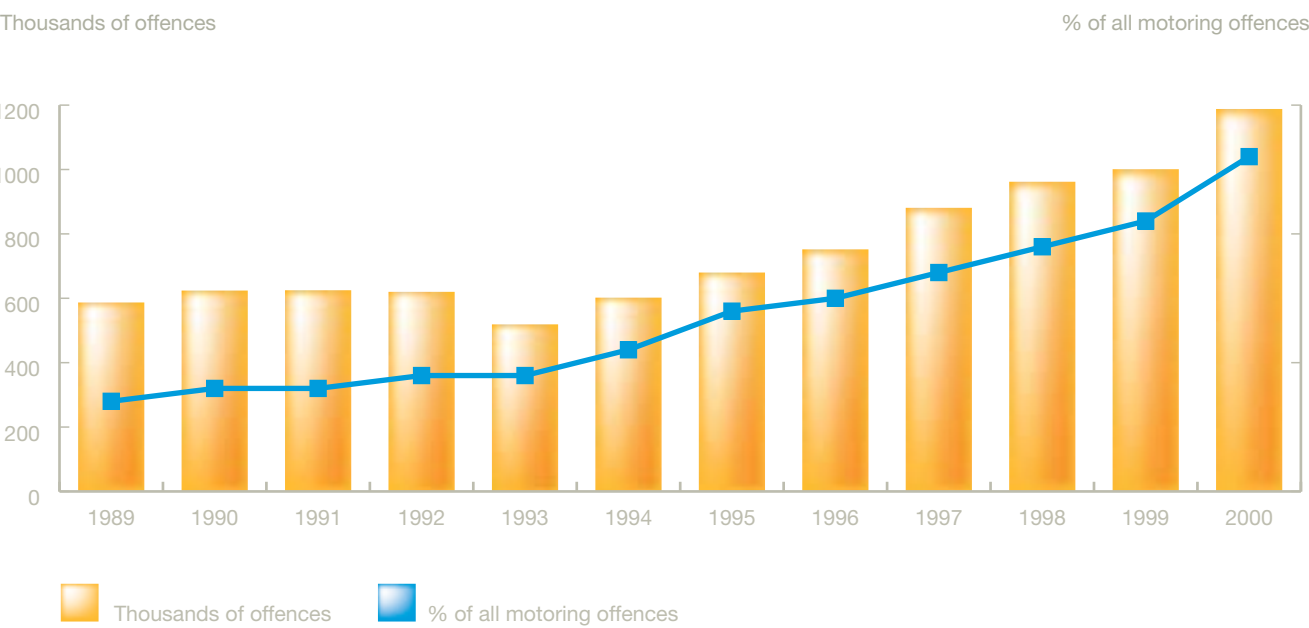
Source: DfT: Vehicle Speeds in Great Britain 2001

Chart 4.2.4
The effectiveness of speed cameras: 1996-2001



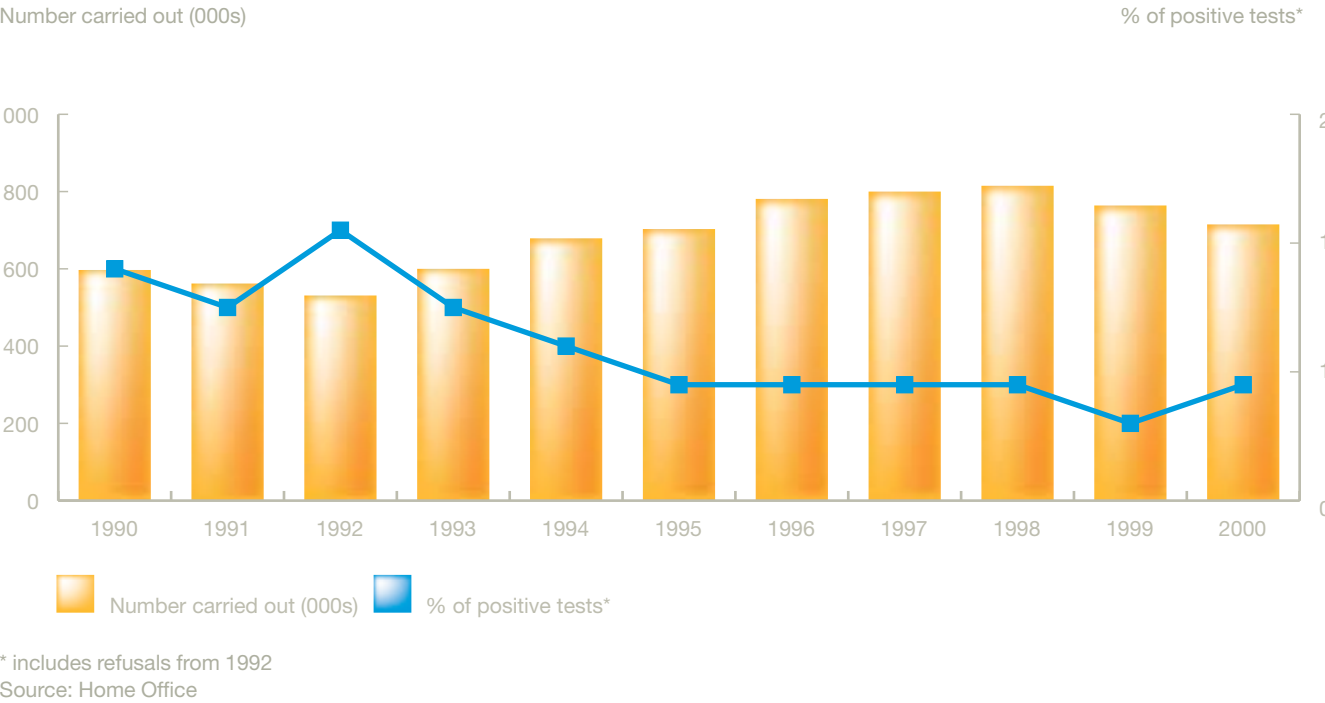
Base: All car drivers
Source: RAC Report on Motoring 2002

Chart 4.2.5
Speed limit offences: 1989-2000



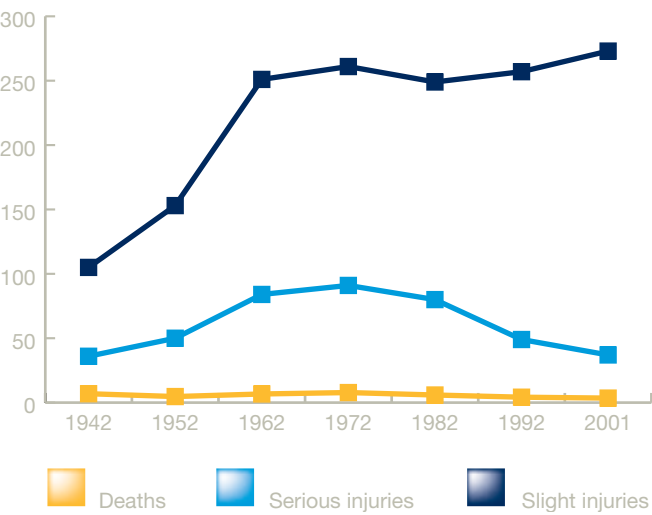
Source: RDS, Home Office

Chart 4.2.6
Number of breath tests: England and Wales: 1990-2000



4.3 Accidents on the road

Chart 4.3.1
The number of injuries on the road: 1942-2001



Source: DfT: Road Accident Statistics

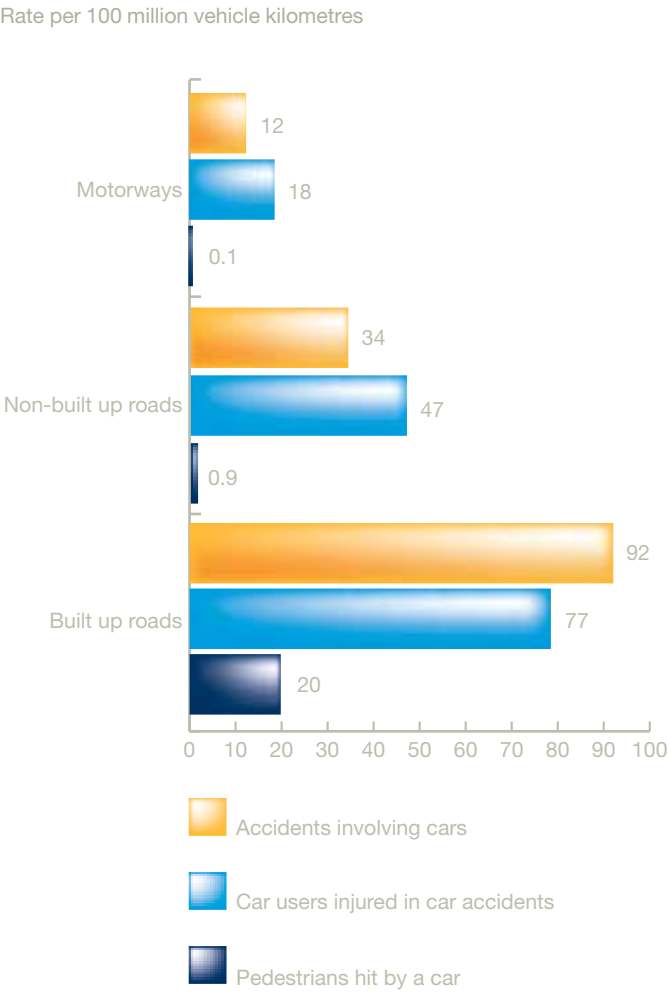
	Deaths (000s)	Serious injuries (000s)	Slight injuries (000s)
1942	6.9	36	105
1952	4.7	50	153
1962	6.7	84	251
1972	7.8	91	261
1982	5.9	80	249
1992	4.2	49	257
2001	3.5	37	273

Chart 4.3.2
Passenger casualty (killed or seriously injured) rated by mode of transport: 1992-2001

	Rate per billion passenger kilometres					
	1992	1994	1996	1998	2000	2001*
Air	0.08	0.00	0.01	0.00	0.00	0.00
Rail	2.6	2.4	19**	16**	17**	n/a
Bus/coach	14	17	15	12	11	10
Car	45	43	42	36	33	32
Motorbike	1,523	1,521	1,369	1,529	1,517	1,537
Pedal cyclist	849	889	881	828	693	670
Pedestrian	780	706	644	572	535	515

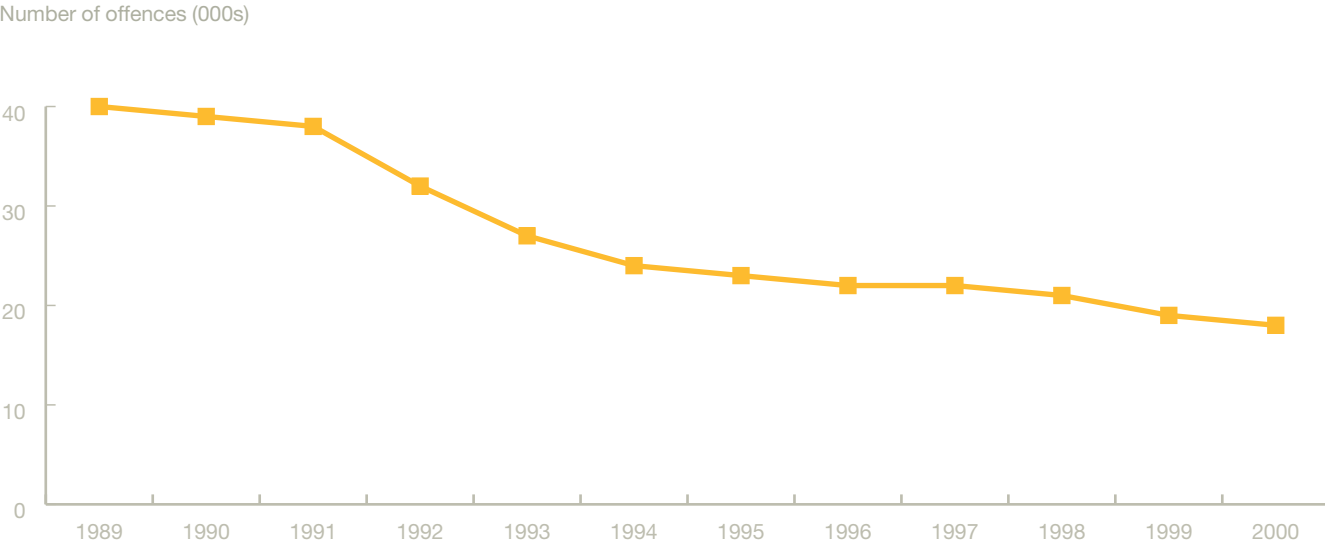
* Indicates provisional figures.
** Data refers to all severities of accident.
Source: CAA / SRA / NTS / Health and Safety Executive (HSE) / DfT: Road Accident Statistics

Chart 4.3.3
Accidents* involving cars - rates by road class: 2001



* Includes all severities of road accident.
Source: DfT: Road Accident Statistics / Road Traffic Statistics

Chart 4.3.4
Accident offences* in England and Wales: 1989-2000



*Aggregate figure of two offences: Failure to stop after an accident and failure to report an accident within 24 hours.
Source: RDS, Home Office

Number of offences (000s)	
1989	40
1990	39
1991	38
1992	32
1993	27
1994	24
1995	23
1996	22
1997	22
1998	21
1999	19
2000	18

Section 5

Keeping the car on the road

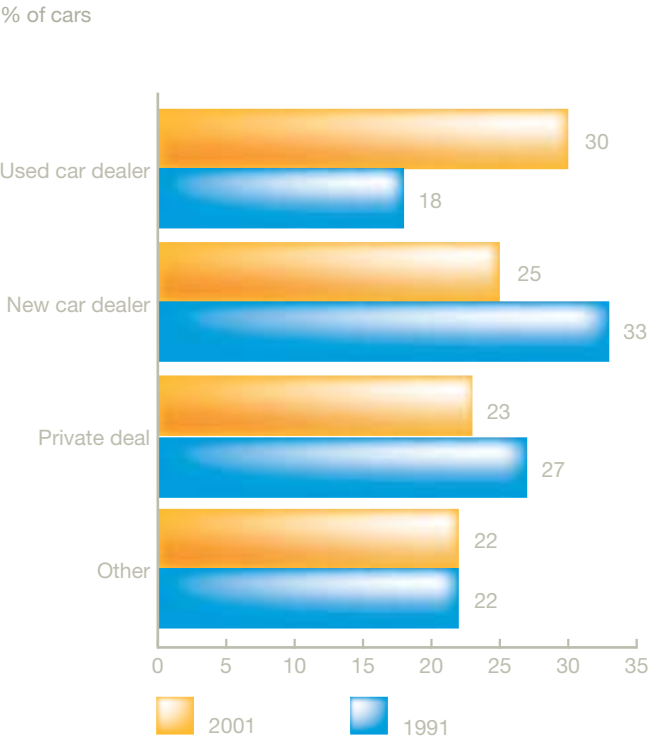
5.1	Purchasing and financing cars
Chart 5.1.1	Source of purchase of used cars: 1991-2001
Chart 5.1.2	The average price paid for private cars: 1992-2001
5.2	Running costs
Chart 5.2.1	Trend in average weekly household spend on motoring: 1974-2000/01
Chart 5.2.2	Average household spend on motoring: 2000/01
Chart 5.2.3	Average weekly household spend on motoring by region: 1998/99 - 2000/01
Chart 5.2.4	Average weekly household spend on motoring by age group: 2000/01
Chart 5.2.5	Typical car running costs by engine size: 2001
5.3	Maintaining the car
Chart 5.3.1	Service location: 1998-2001
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5.4	Insurance
Chart 5.4.1	Value of motor insurance premiums: 1990-2000
Chart 5.4.2	Number of insurance claims: 1990-2000
5.5	Short-term rental
Chart 5.5.1	Total value of short-term rental market: 1998-2001
Chart 5.5.2	Short term rental market by type: 2000

Key motoring facts

- The average cost paid for a new private car has risen from £8,200 in 1992 to £11,800 in 2001, while the average price paid for a used car has risen from £3,200 to £6,000.
- The average household spent nearly £2,900 on motoring in 2000/01.
- On average, UK households spend 14% of their average weekly spend on motoring, compared to 16% on housing, 16% on food and non-alcoholic drink and 6% on clothing.
- Since 1974, the average household spend on motoring has risen by an average of £75 every year.
- 30% of all motorists are unaware of how much their car costs to run.
- The typical running cost for a car with an engine size of 1100cc is £2,650 per year (this includes fuel, insurance, maintenance, depreciation and car tax), rising to £6,800 per year for a car with a 2000 or more cc engine.
- In 2001, 76% of people who owned ‘new’ cars used a franchised dealer for their service, compared with 21% of people who owned used cars.
- In 1988, nearly a quarter of private cars were serviced by the owner themselves, by 2001 this figure had fallen to just over one in ten.
- Three quarters of motorists are members of a motoring organisation.
- Motor insurance premiums were worth £10.6 billion in 2000.
- In 1999, the number of private car comprehensive insurance claims was 2,778,000 – each claim was worth an average of £1,429.
- In 2000, the total value of the short-term rental market was £1.2 billion.
- `UK businesses are the most important sector for the short-term car hire market, accounting for 43% of market value in 2000.

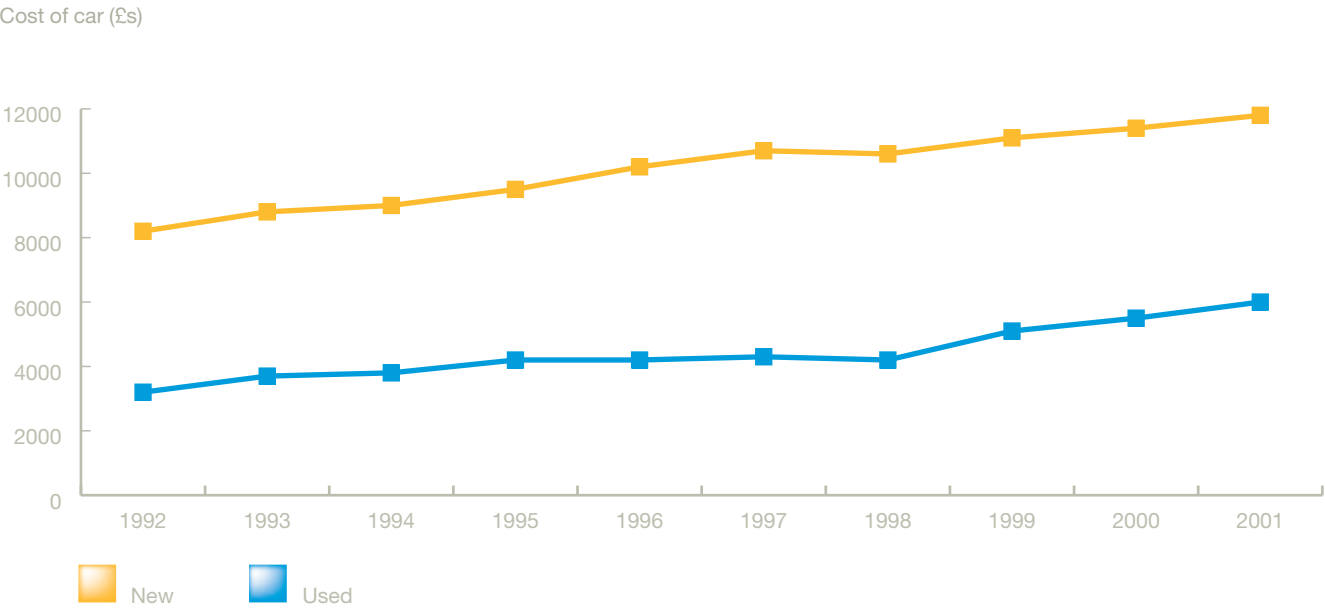
5.1 Purchasing and financing cars

Chart 5.1.1
Source of purchase of used cars: 1991-2001



Source: Lex / RAC Report on Motoring

Chart 5.1.2
The average price paid for private cars: 1992-2001

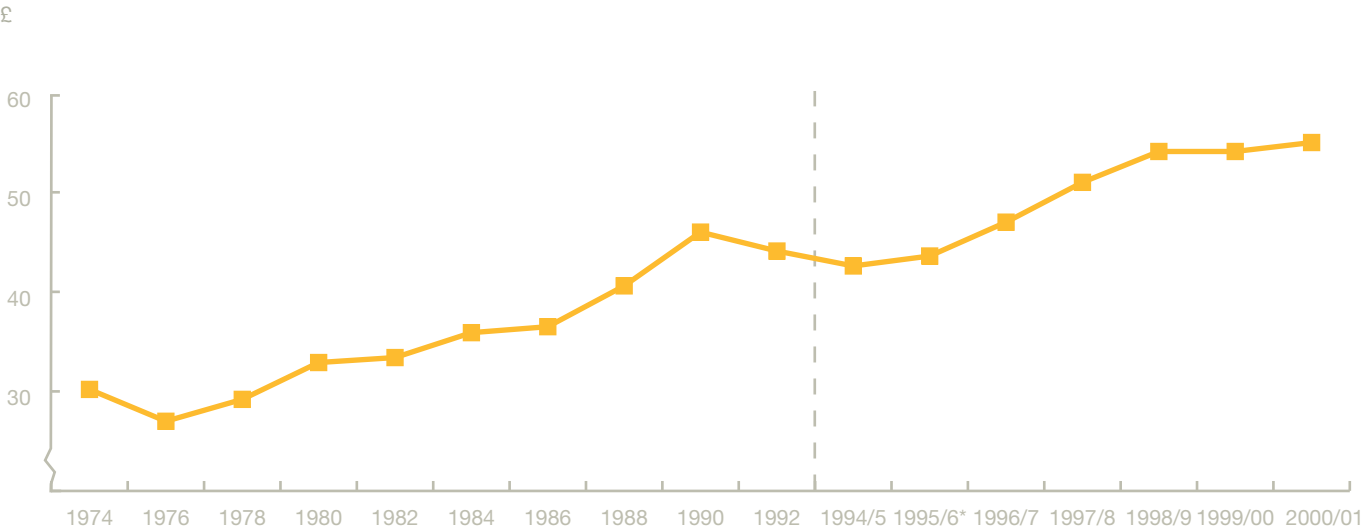


Source: Lex / RAC Report on Motoring

	Cost of car (£s)	
	New	Used
1992	8,200	3,200
1993	8,800	3,700
1994	9,000	3,800
1995	9,500	4,200
1996	10,200	4,200
1997	10,700	4,300
1998	10,600	4,200
1999	11,100	5,100
2000	11,400	5,500
2001	11,800	6,000

5.2 Running costs

Chart 5.2.1
Trend in average weekly household spend on motoring: 1974-2000/01



*From 1995-6 onwards, figures shown are based on weighted data. Pre-1995-6, figures shown are based on unweighted, adult only data.
Source: Family Expenditure Survey 2000/01

	£
1974	30.20
1976	27.00
1978	29.20
1980	32.90
1982	33.40
1984	35.90
1986	36.50
1988	40.60
1990	46.00
1992	44.10
1994/5	42.60
1995/6*	43.60
1996/7	47.00
1997/8	51.00
1998/9	54.10
1999/00	54.10
2000/01	55.00

Chart 5.2.2
Average household spend on motoring: 2000/01

Average weekly spend on...	£	% of total motoring spend
Cars, vans and motorcycles purchases	23.00	42
Petrol, diesel and other motor oils	15.80	29
Motor vehicle insurance and taxation	8.20	15
Car and van repairs and servicing	4.50	8
Other motoring expenses	1.80	3
Spare and accessories	1.70	3
Total	55.00	100

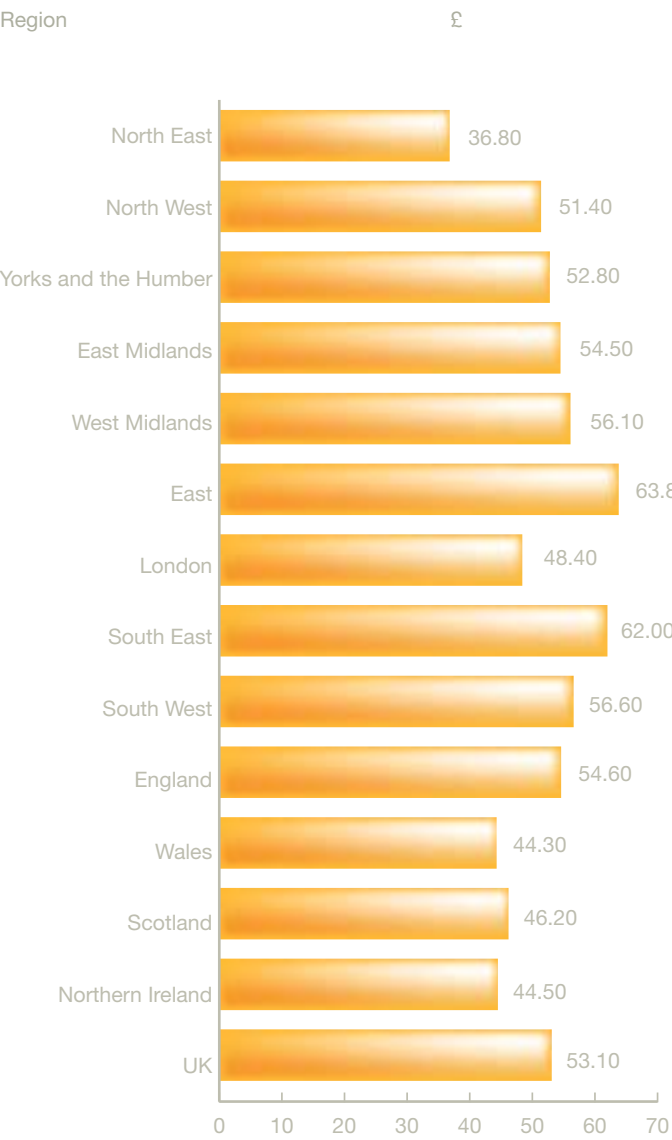
Source: Family Expenditure Survey 2000/2001

Chart 5.2.4
Average weekly household spend on motoring by age group: 2000/01

Age	£
Under 30	52.00
30 and under 50	67.30
50 and under 65	67.60
65 and under 75	32.70
75 or over	15.40
All households	55.10

Source: Family Expenditure Survey 2000-2001

Chart 5.2.3
Average weekly household spend on motoring by region: 1998/99 - 2000/01



Source: Family Expenditure Survey 2000/01

Chart 5.2.5
Typical car running costs by engine size: 2001

£ per annum	Engine size cc 1100	1100-1500	1500-1800	2000+
Fuel	900	1000	1150	1600
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
Total	2,650	3,550	4,450	6,800

Source: Emmerson Hill running cost tables / LVL / RAC Report on Motoring 2002

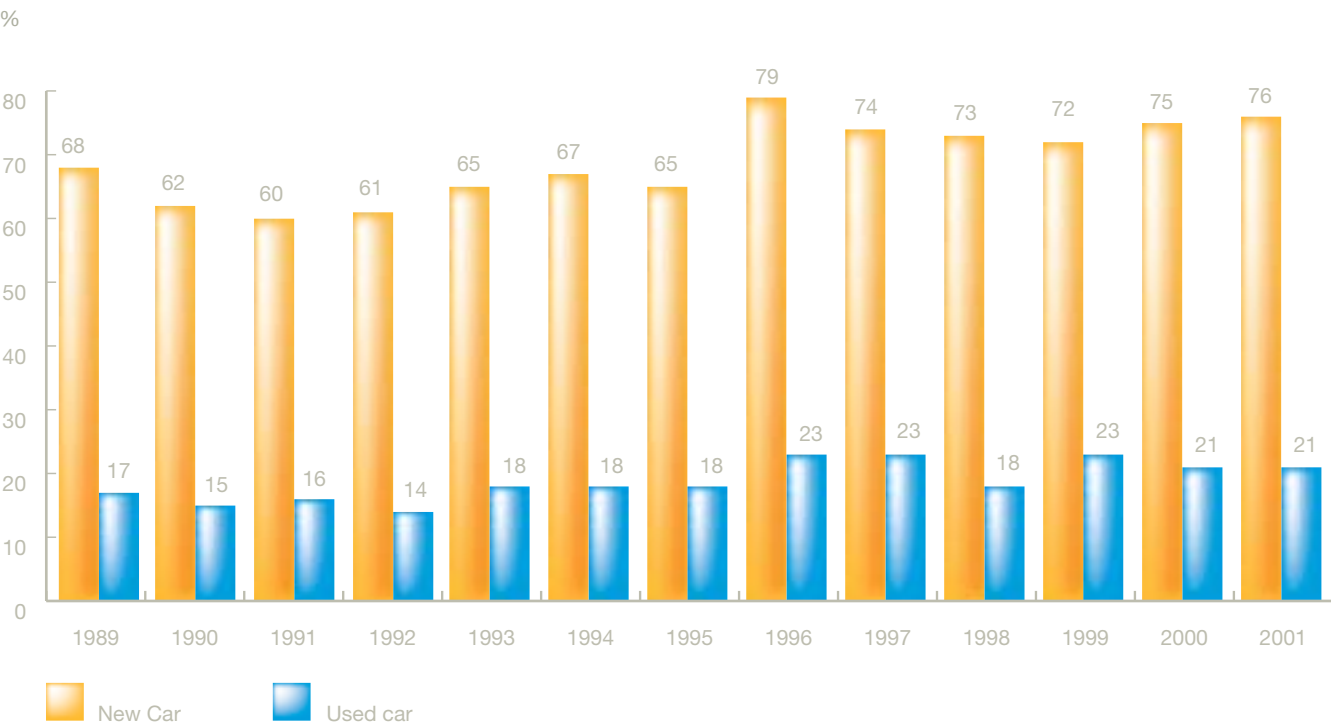
5.3 Maintaining the car

Chart 5.3.1
Service location: 1998 and 2001

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

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

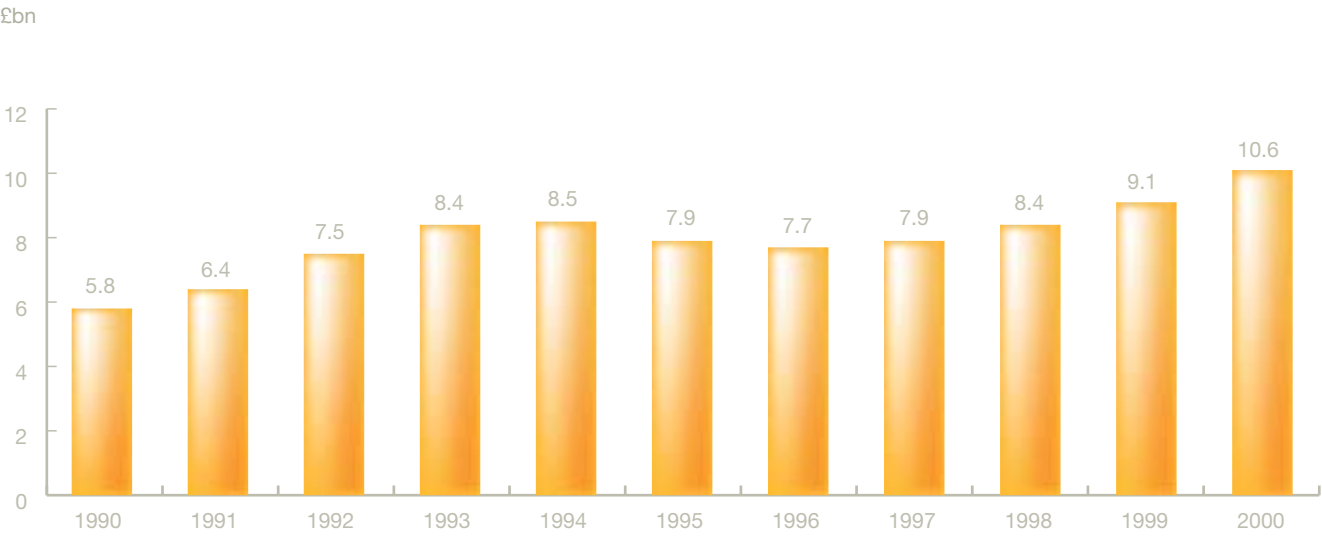
Chart 5.3.2
Use of franchised dealer for servicing: 1989–2001



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

5.4 Insurance

Chart 5.4.1
Value of motor insurance premiums: 1990-2000



Source: Association of British Insurers (ABI)

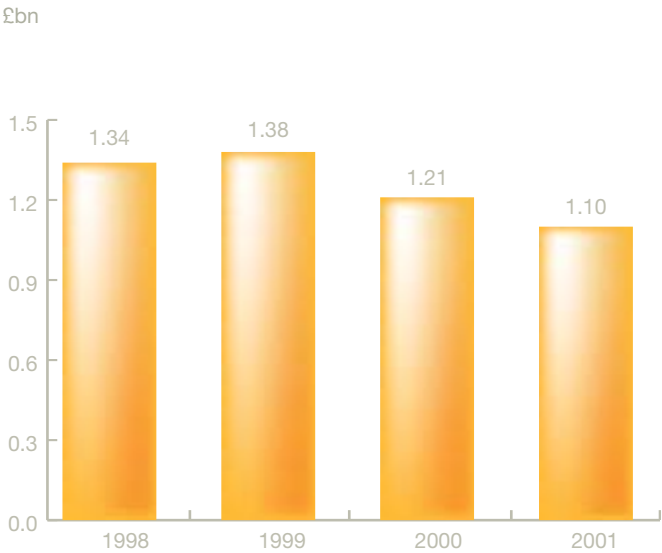
Chart 5.4.2
Number of insurance claims: 1990-2000

	Private car comprehensive		Private car non-comprehensive	
	Number 000	Average claim £	Number 000	Average claim £
1990	2,365	890	540	837
1991	2,379	964	592	951
1992	2,053	1,033	553	1,115
1993	2,359	988	634	1,220
1994	2,316	1,047	586	1,426
1995	2,484	1,053	575	1,504
1996	2,507	1,180	449	1,839
1997	2,494	1,283	363	2,072
1998	2,712	1,359	314	2,080
1999	2,778	1,429	269	2,345
2000	2,930	1,527	240	2,649

Source: ABI

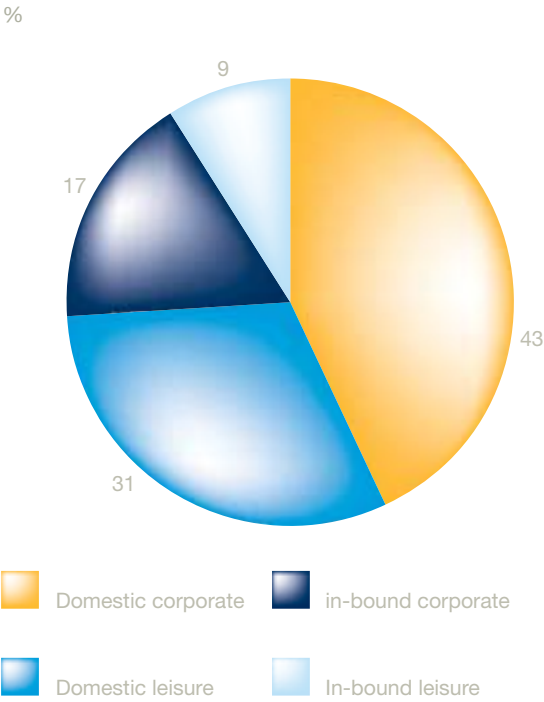
5.5 Short-term rental

Chart 5.5.1
Total value of short-term rental market: 1998-2001



Source: British Vehicle Rental and Leasing Association (BVRLA)

Chart 5.5.2
Short term rental market by type: 2000



Source: BVRLA

Section 6

Cars and the environment

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Chart 6.1.2	CO ₂ emissions in the UK: 1990-2000
Chart 6.1.3	CO ₂ emissions per vehicle: 1992-2000
Chart 6.1.4	Average CO ₂ emissions for new cars in the UK: 1997-2001
Chart 6.1.5	Car makes and models with the lowest CO ₂ emissions: 2001
6.2	Fuel
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Chart 6.2.2	UK forecourt diesel prices and duties per litre: April 1992-2002
Chart 6.2.3	New car sales by fuel type in the UK: 1997-2000
Chart 6.2.4	Alternative fuel car sales in the UK: 1998-2000
Chart 6.2.5	Number of UK petrol forecourts by type of owner: 1996-2001

Key motoring facts

- More than 9 million cars are now fitted with catalytic converters.
- Road transport makes up approximately 21 % of total man-made CO₂ emissions in the UK.
- CO₂ emissions from road transport was 31 million tonnes in 2001, with emissions per vehicle having fallen from 1.08 tonnes per vehicle in 1993 to 0.95 tonnes in 2001.
- Sales of electric cars grew by 17% in 2000, while sales of petrol/gas hybrid vehicles increased by 23% across the same period. Despite this, in 2000, they still only represented 0.2% of all new car sales
- In the 3 years to 2000, CO₂ average emissions per car sold declined by 5% to 181 g/km and motorists gained an extra 18% of miles per gallon of fuel. This was partially due to improvements in car performance and partially to the types of cars being sold.
- In July 2002, UK prices of unleaded petrol were the second highest in Europe at nearly 73p, despite having the lowest price before tax.
- In July 2002, UK diesel prices (including taxes) were the highest in the EU, more than 20 pence per litre more expensive than Italy (the second highest) and 35 pence per litre higher than in Greece (the lowest).
- 90% of badly polluting vehicles could be re-tuned within 15 minutes.
- 10% of major urban roads will break pollution standards for nitrogen dioxide in 2005. Almost two-thirds of these are in London.
- Road transport produces 70% of all emissions of Carbon Monoxide (CO). Emissions from road transport rose in the 1970s/80s, but have nearly halved in the last decade, mainly due to the introduction of catalytic converters.
- It takes 50 modern cars to produce the same amount of emissions as 1 car did in the 1970s. By 2005 this figure will have reached 75 cars.
- In heavy traffic jams, the air quality can be poorer inside the car than out. Car users regularly suffer up to 3 times as much pollution as pedestrians.

6.1 Car emissions

Chart 6.1.1
Number of models available in the UK meeting the Euro IV emission standards: 2000-2002

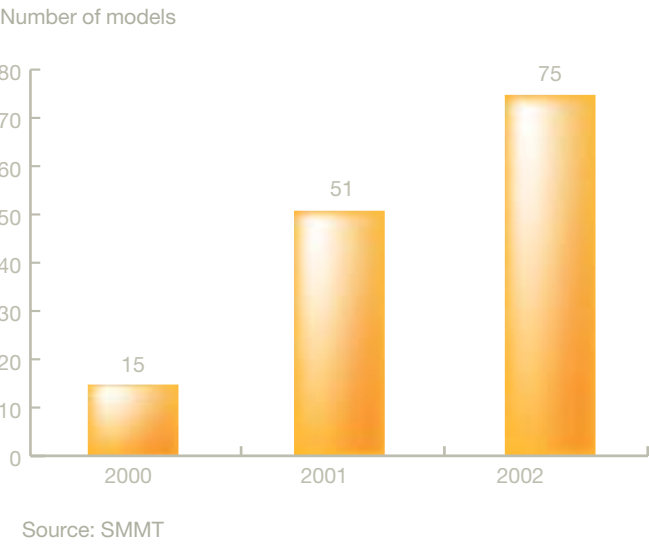
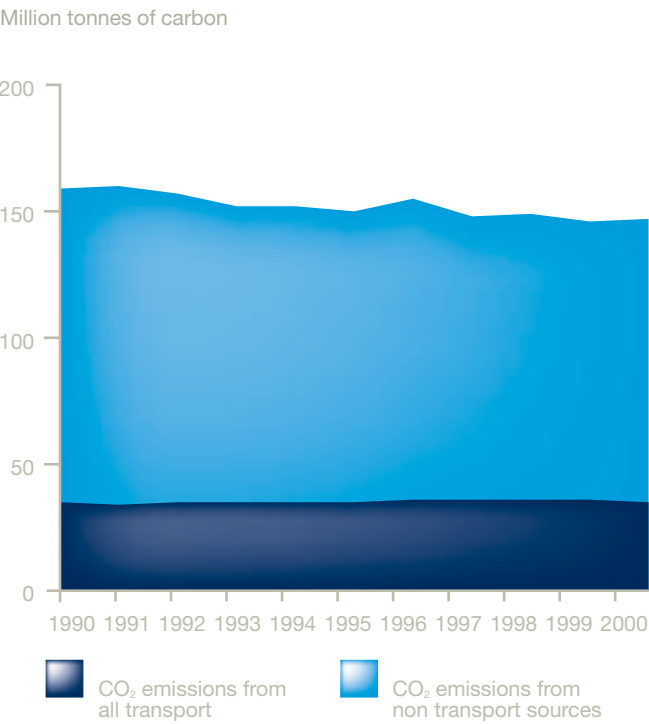


Chart 6.1.2
CO₂ emissions* in the UK: 1990-2000



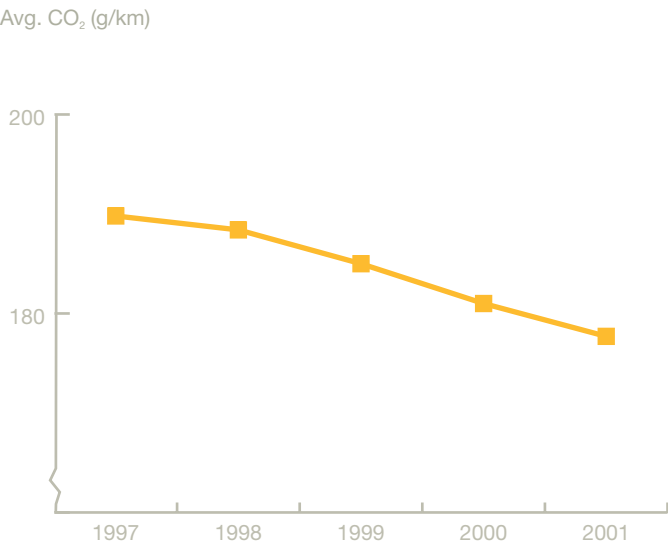
*Emissions for transport do not include a share of the emissions from combustion of fossil fuels at power stations and other fuel processing industries.
Source: National Environmental Technology Centre

Chart 6.1.3
CO₂ emissions per vehicle: 1992-2000

	Million tonnes	Total vehicles on GB roads (millions)	Tonnes carbon per vehicle
1992	29.5	27.7	1.06
1993	30.3	28.0	1.08
1994	30.4	28.4	1.07
1995	30.1	28.9	1.04
1996	31.3	29.4	1.06
1997	31.7	30.3	1.04
1998	31.5	31.1	1.01
1999	31.2	31.6	0.99
2000	30.7	32.2	0.95

Source: SMMT

Chart 6.1.4
Average CO₂ emissions for new cars in the UK: 1997-2001



Source: SMMT

Avg. CO ₂ (g/km)	
1997	189.8
1998	188.4
1999	185.0
2000	181.0
2001	177.7

Chart 6.1.5
Car makes and models with the lowest CO₂ emissions: 2001

Ranked by CO ₂ output			
	Engine size	Fuel Type	CO ₂ (g/km)
Honda Insight	1.0	Petrol/Electric hybrid	80
Peugeot 206	1.4	Diesel	113
Toyota Prius	1.5	Petrol/Electric hybrid	114
Renault Clio	1.5	Diesel	115
Audi A2	1.4	Diesel	116
MCC Smart	0.6	Petrol	118
Seat Arosa, VW Lupo, VW Polo	1.4	Diesel	119
Seat Arosa, VW Lupo, VW Polo	1.7	Diesel	119
Vauxhall Astra	1.7	Diesel	119

Source: SMMT

6.2 Fuel

Chart 6.2.1
UK forecourt unleaded petrol prices and duties per litre: April 1992-2002

	Pence/percentage			
	Price	Duty	VAT	All tax as a % of price
April 1992	46.1	23.4	6.9	66
April 1993	50.1	25.8	7.5	66
April 1994	51.2	28.3	7.6	70
April 1995	54.1	31.3	8.1	73
April 1996	55.2	34.3	8.2	77
April 1997	59.2	36.9	8.8	77
April 1998	65.8	44.0	9.8	82
April 1999	70.2	47.2	10.5	82
April 2000	80.0	48.8	11.9	76
April 2001	75.9	45.8	11.3	75
April 2002	75.0	45.8	11.2	76

Source: Department of Trade and Industry (DTI): Quarterly Energy Prices

Chart 6.2.2
UK forecourt diesel prices and duties per litre: April 1992-2002

	Pence/percentage			
	Price	Duty	VAT	All tax as a % of price
April 1992	44.6	22.9	6.6	66
April 1993	49.3	25.1	7.3	66
April 1994	51.4	27.7	7.7	69
April 1995	54.7	31.3	8.2	72
April 1996	56.4	34.3	8.4	76
April 1997	60.2	36.9	9.0	76
April 1998	66.8	45.0	10.0	82
April 1999	73.2	50.2	10.9	83
April 2000	81.1	48.8	12.1	75
April 2001	77.3	45.8	11.5	74
April 2002	76.9	45.8	11.5	74

Source: DTI Quarterly Energy Prices

Chart 6.2.4
Alternative fuel car sales* in the UK:
1998-2000

	New car sales			%change 1998-2000
	1998	1999	2000	
Petrol/gas hybrid	3,500	3,740	4,600	+32
Gas	161	97	52	-68
Electric	46	42	49	+7

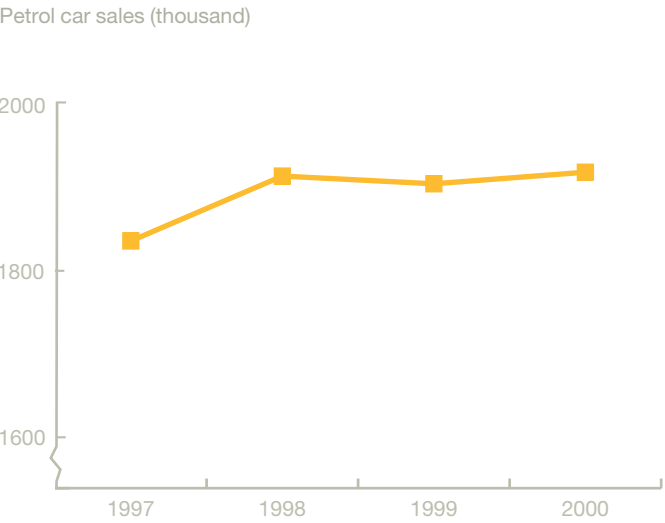
* Year of first registration.
Source: SMMT

Chart 6.2.5
Number of UK petrol forecourts by type
of owner: 1996-2001

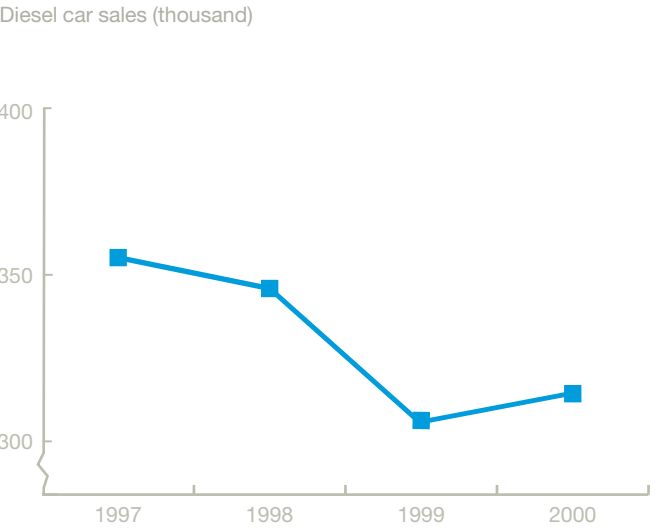
	1996	1999	2001	% change 96-01
Independent	8344	7576	7100	-15%
Wholesaler owned	6406	6140	5809	-9%
Total	14750	13716	12909	-12.5

Source: Petroleum Review

Chart 6.2.3
New car sales by fuel type in the UK:
1997-2000



Source: SMMT



Source: SMMT

	Car sales (thousand)		
	Petrol	Diesel	Total
1997	1,820	351	2,171
1998	1,904	343	2,247
1999	1,894	304	2,198
2000	1,909	313	2,222

Section 7

Company cars

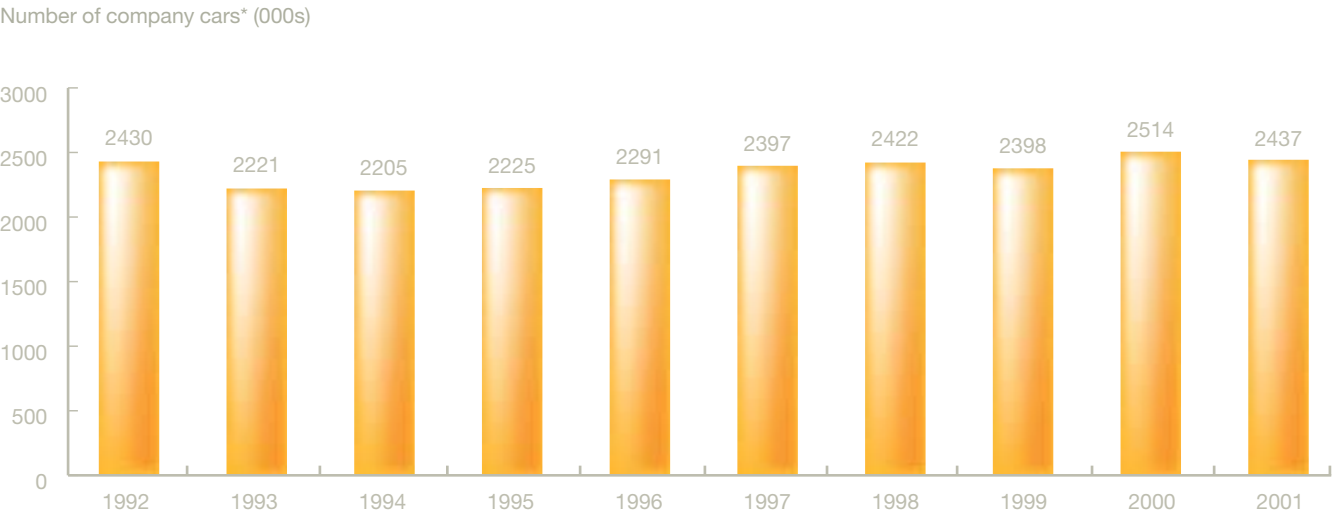
7.1	The number of company cars
Chart 7.1.1	The number of company cars on the UK's roads: 1992-2001
Chart 7.1.2	Company cars by industry sector: 2000
Chart 7.1.3	The age profile of company cars: 2000
7.2	Company car sales
Chart 7.2.1	Company car sales as a proportion of total car sales: 1992-2001
Chart 7.2.2	Company car sales by fleet size: 1992-2001
7.3	Acquisition and disposal
Chart 7.3.1	Methods of acquiring and disposing of company cars: 2000
Chart 7.3.2	Sources of finance for company car purchases: 2000
7.4	A profile of company cars
Chart 7.4.1	The average price paid for new cars: 1992-2001
Chart 7.4.2	The engine size of company cars: 1994-2002
Chart 7.4.3	Diesel cars' share of overall company car sales: 1991-2000
7.5	A profile of company car drivers
Chart 7.5.1	Methods of fuel purchase for company cars: 2001
Chart 7.5.2	Profile of company car drivers by gender, age and region: 2002
Chart 7.5.3	The importance of the company car: 1993-2002
Chart 7.5.4	Miles driven for work (excluding commuting): 2002
7.6	Company car taxation
Chart 7.6.1	Revenues raised through company car taxation: 1996-2001

Key motoring facts

- There are around 2.4 million company cars on the UK's roads and an additional 0.6 million cars belonging to the self employed.
- The average age of a company car (provided by the company or purchased as a business expense) is 3.4 years compared with 6.3 for private cars.
- The service sector accounts for nearly half of all company cars on the road.
- Company car sales increased by 66% between 1992 and 2001.
- Small fleets (under 25 vehicles) accounted for 17% of company car sales in 2001 compared to 11% in 1992.
- In 2001 the clear majority of company cars drivers were male (78%).
- According to Lex Vehicle Leasing, 36% of company car drivers 'strongly agree' that they are a good driver, compared to less than 1% who 'strongly disagree'.
- Company car tax raised some £3.7 billion of revenue for the Treasury in 2001.
- Among things that Lex Vehicle Leasing have found in company cars at the end of a contract hire term are – CDs, spectacles, toupees, a false leg, weekly shop, flowers, false teeth and a pantomime horse outfit.
- 10% of company car drivers in 2000 agreed that their cars looked like a dustbin had been emptied in it.
- Less than one in ten company car drivers have a name for their car.

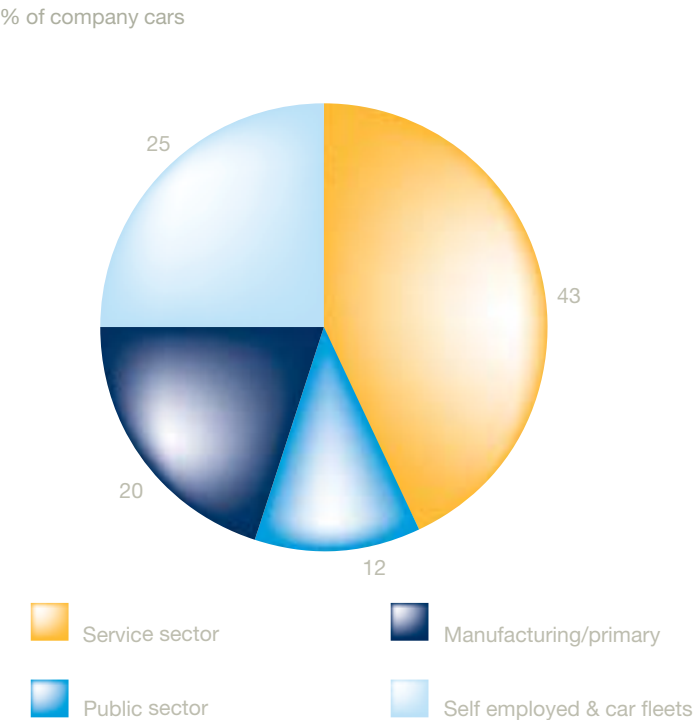
7.1 The number of company cars

Chart 7.1.1
The number of company cars on the UK's roads: 1992-2001



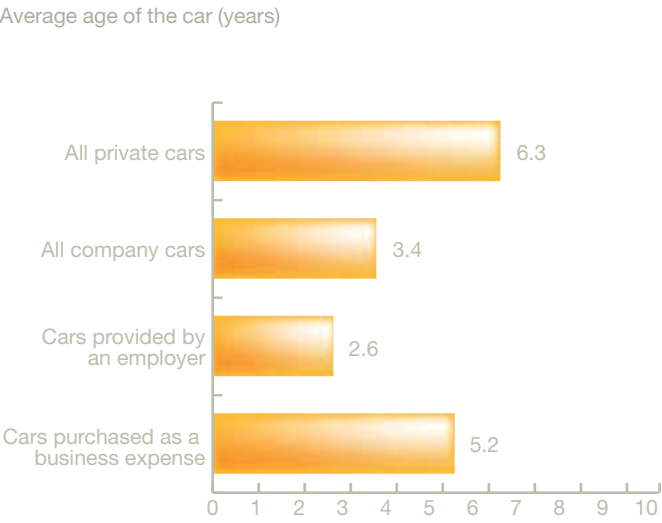
* These figures exclude some company cars owned by the self-employed, which are estimated to account for an additional 600,000 cars.
Source: SMMT / DfT

Chart 7.1.2
Company cars by industry sector: 2000



Source: LVL Report on Company Motoring 2001

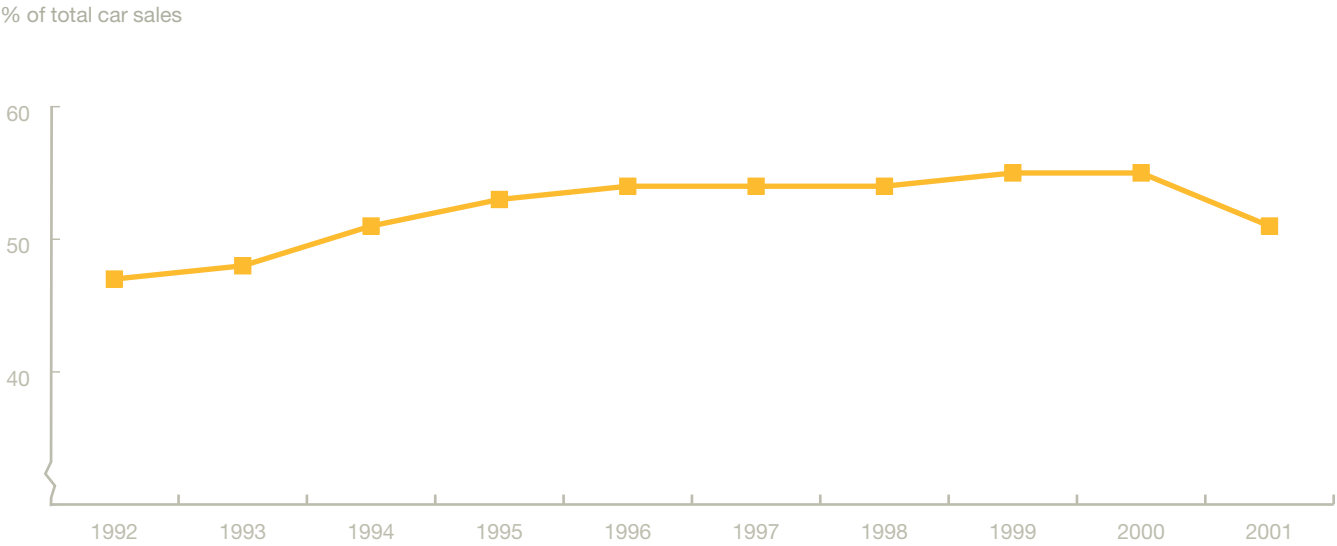
Chart 7.1.3
The age profile of company cars: 2000



Source: RAC Report on Motoring 2001

7.2 Company car sales

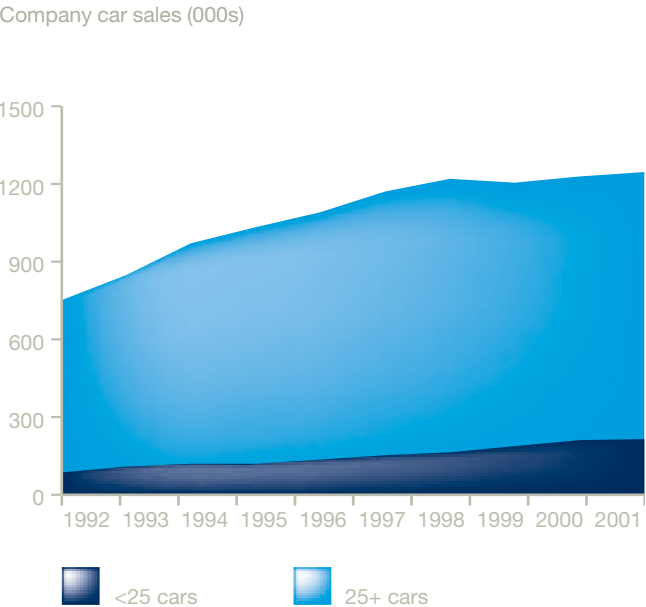
Chart 7.2.1
Company car sales as a proportion of total car sales: 1992-2001



Source: LVL Report on Company Motoring / SMMT

% of total car sales	
1992	47
1993	48
1994	51
1995	53
1996	54
1997	54
1998	54
1999	55
2000	55
2001	51

Chart 7.2.2
Company car sales by fleet size: 1992-2001

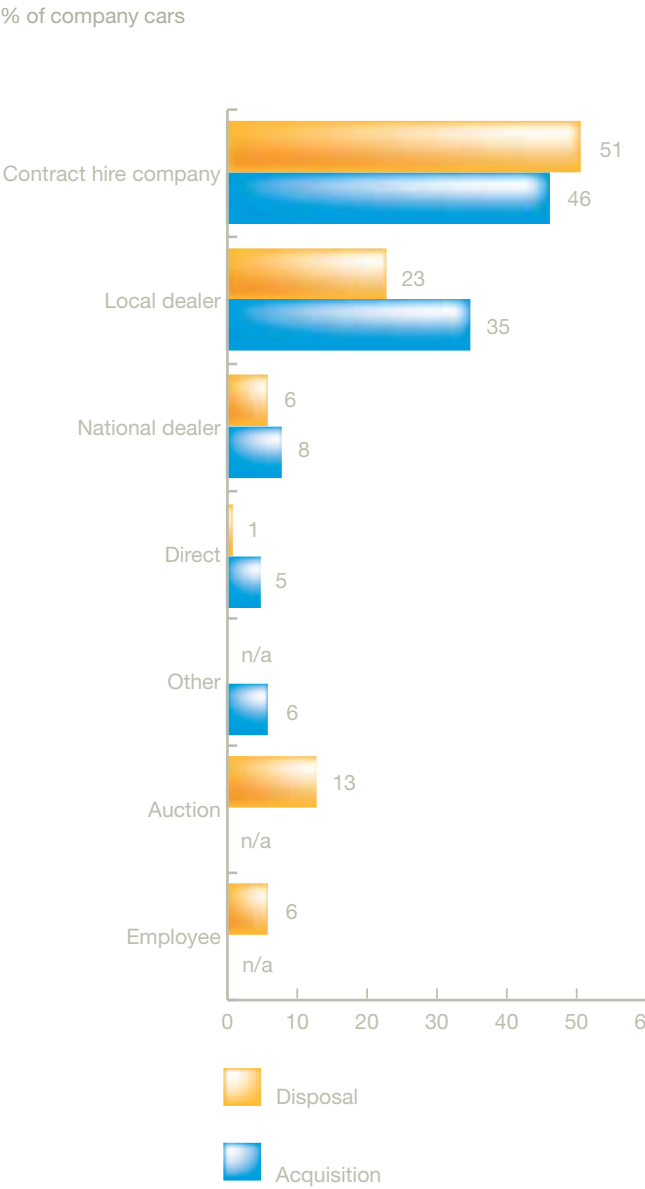


Source: LVL Report on Company Motoring / SMMT

Fleet size	Company car sales (000s)		Total
	<25 cars	25+ cars	
1992	85	665	750
1993	108	739	847
1994	119	851	971
1995	119	913	1,032
1996	135	955	1,091
1997	152	1,018	1,170
1998	163	1,056	1,219
1999	187	1,017	1,204
2000	210	1,018	1,228
2001	214	1,031	1,246

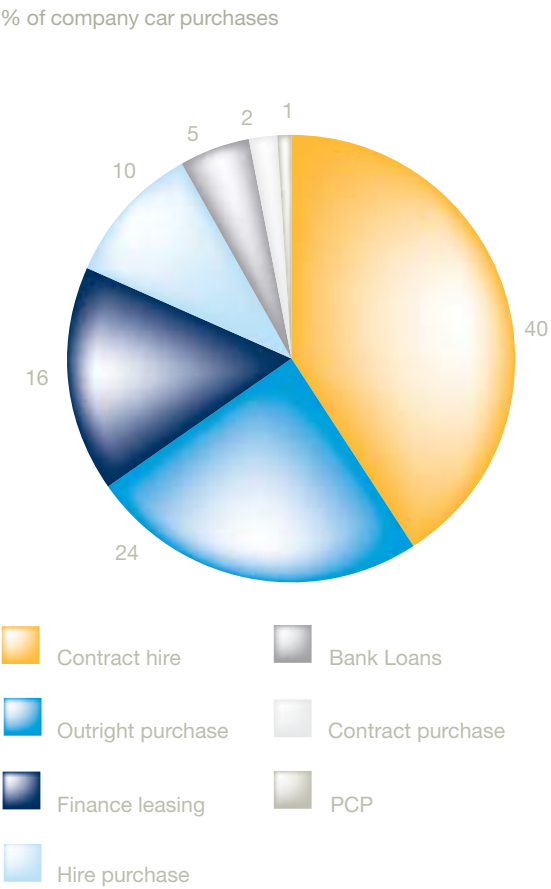
7.3 Acquisition and disposal

Chart 7.3.1
Methods of acquiring and disposing of company cars: 2000



Source: LVL Report on Company Motoring 2001

Chart 7.3.2
Sources of finance for company car purchases: 2000



Base: All fleet managers
Source: LVL Report on Company Motoring 2001

7.4 A profile of company cars

Chart 7.4.1
The purchase cost of new cars: 1992-1999

	Average price paid (£s)	
	Company cars	Private cars
1992	13,100	8,200
1993	13,000	8,800
1994	13,800	9,000
1995	15,600	9,500
1996	14,800	10,200
1997	15,800	10,700
1998	15,900	10,600
1999	16,200	11,000
2000	16,000	11,400
2001	18,000	11,800

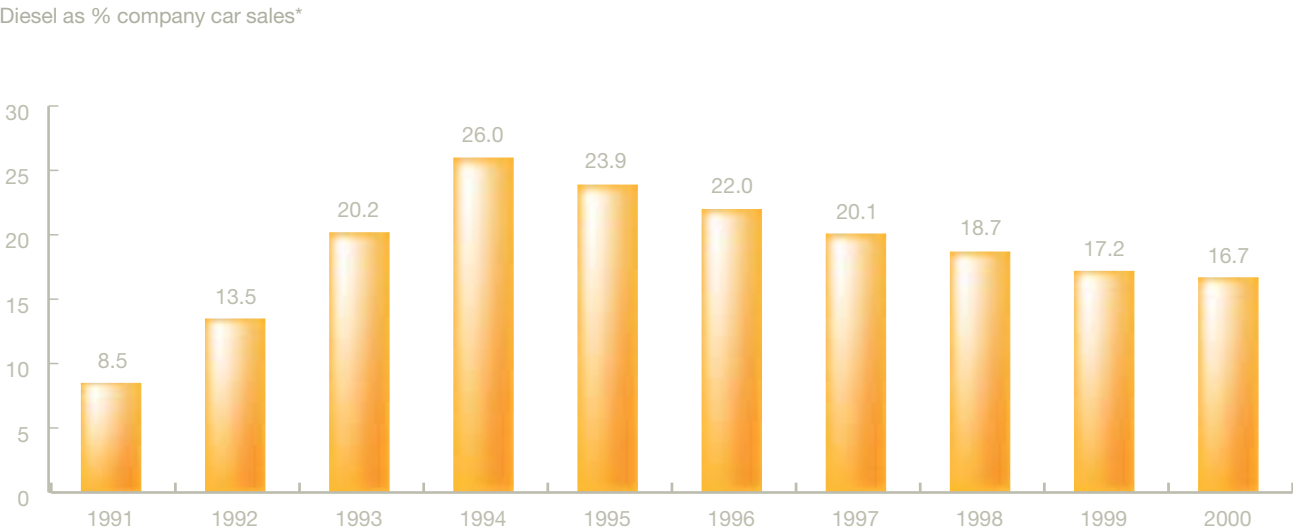
Base: All motorists
Source: LVL / RAC Report on Motoring

Chart 7.4.2
The engine size of company cars: 1994-2002

	% of company cars			
	1994	1996	1998	2000
Up to 1400cc	12	11	11	11
1400cc-2000cc	67	64	66	74
Over 2000cc+	21	25	23	15

Base: All company car drivers
Source: LVL Report on Company Motoring

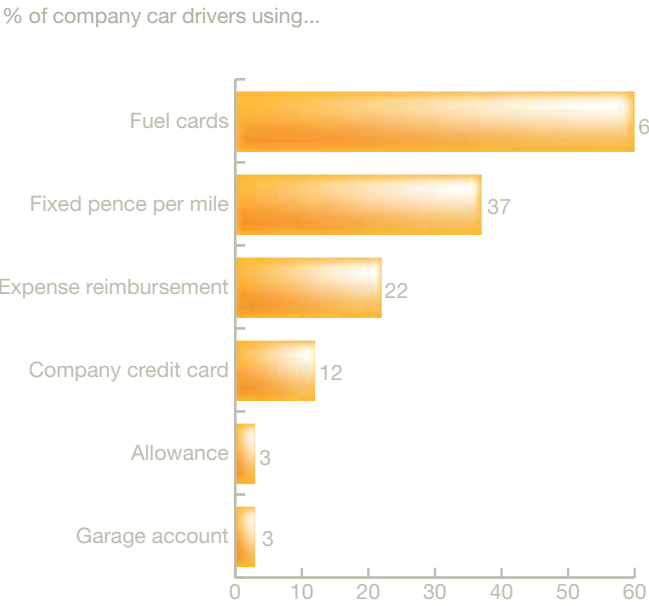
Chart 7.4.3
Diesel cars' share of overall company car sales: 1991- 2000



* Fleets of 25 cars or more.
Source: SMMT

7.5 A profile of company car drivers

Chart 7.5.1
Methods of fuel purchase for company cars: 2001



Source: Monks Partnership Company Car UK

Chart 7.5.2
Profile of company car drivers by gender, age and region: 2002

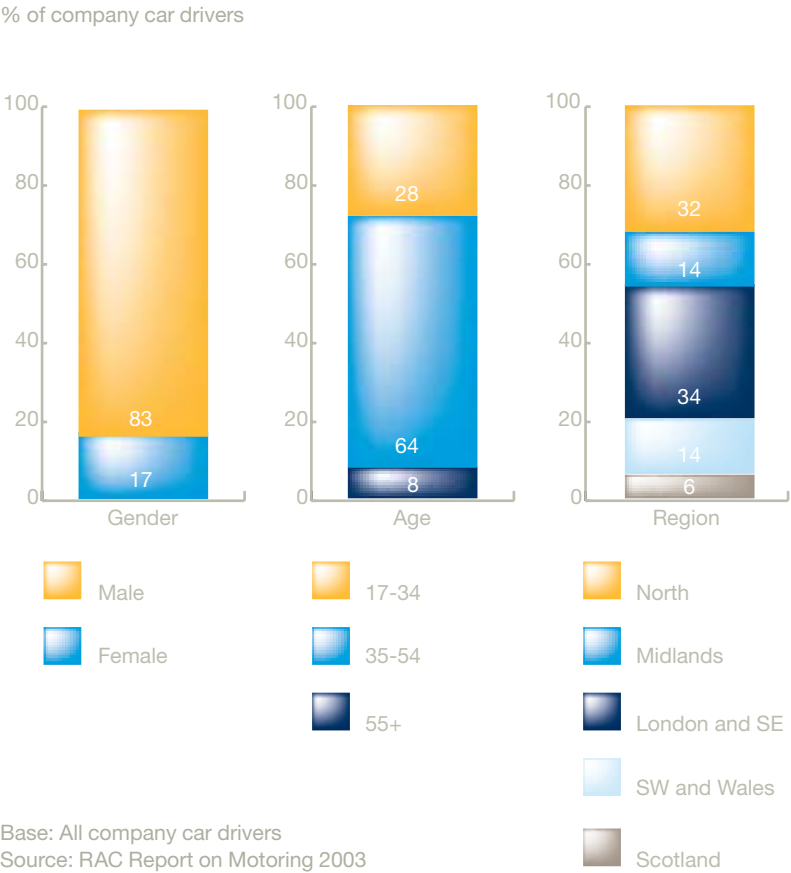


Chart 7.5.3
The importance of the company car: 1993-2002

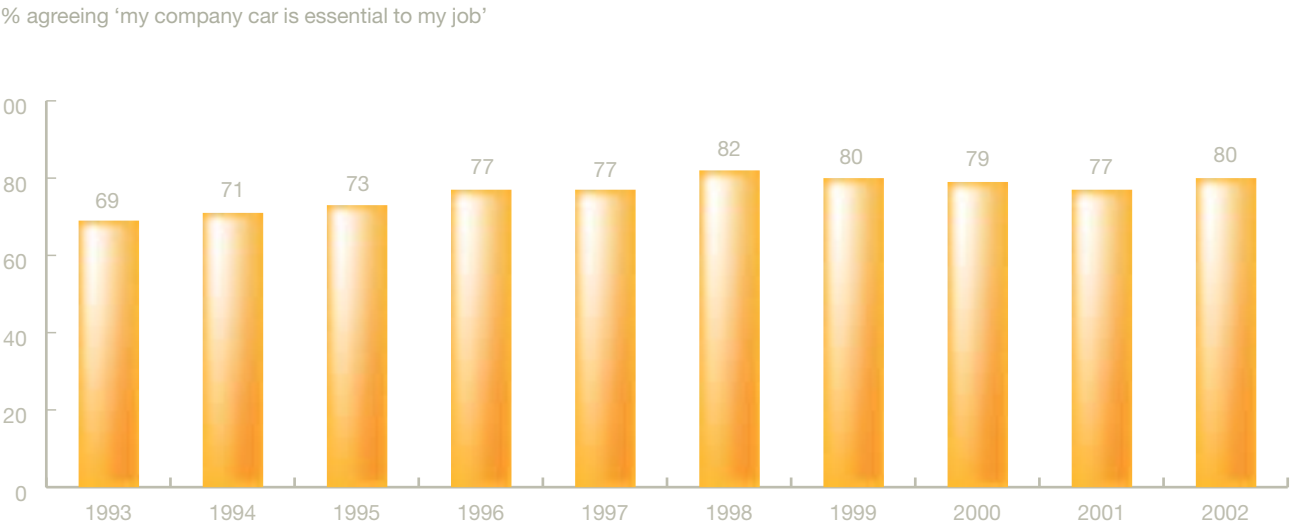
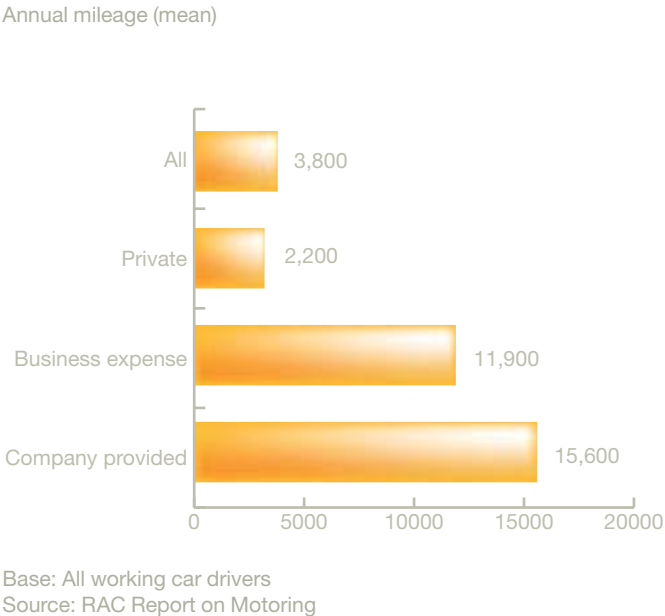
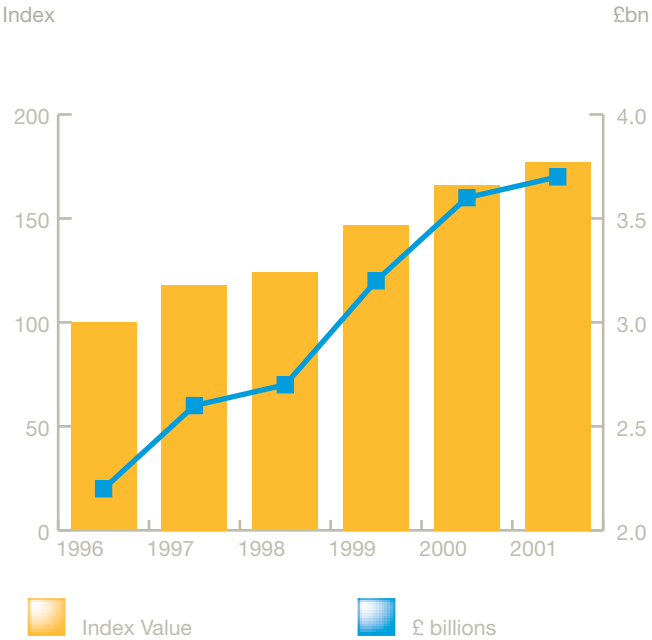


Chart 7.5.4
Miles driven for work (excluding commuting): 2002



7.6 Company car taxation

Chart 7.6.1
Revenues raised through company car taxation: 1996-2001



Section 8

Overview of the UK car industry

8.1	The UK car industry in the economy
Chart 8.1.1	Motoring economic indicators: 2000-2001
Chart 8.1.2	Car production in the UK and European Union: 1997-2001
Chart 8.1.3	UK car production – domestic versus export sales: 1997-2001
8.2	Car sales by manufacturer
Chart 8.2.1	New car sales by manufacturer: 1990-2001

Key motoring facts

- UK automotive sector turnover stood at £44 billion in 2001.
- 1.5 million cars were produced in the UK in 2001.
- 827,000 jobs are dependent on the UK car industry.
- Car production in the UK fell by 16% between 1999 and 2001.
- 60% of cars made in the UK in 2001 were for the export market.
- In 2000, 1 in 9 cars manufactured in the EU was made in the UK.
- In 2001, the top five selling cars by manufacturer were by sales Ford, Vauxhall, Audi VW, Peugeot and Renault.

8.1 The UK car industry in the economy

Chart 8.1.1
Motoring economic indicators: 2000-2001

	2000	2001
UK automotive sector turnover	£43bn	£44bn
Share of total manufacturing turnover	9.1%	9.3%
Sector value added share of UK GDP	3.5%	3.5%
Total investment by the sector	£2.3bn	£2.2bn
Employment dependant on the sector (no. employees)	835,000	827,000

Source: SMMT

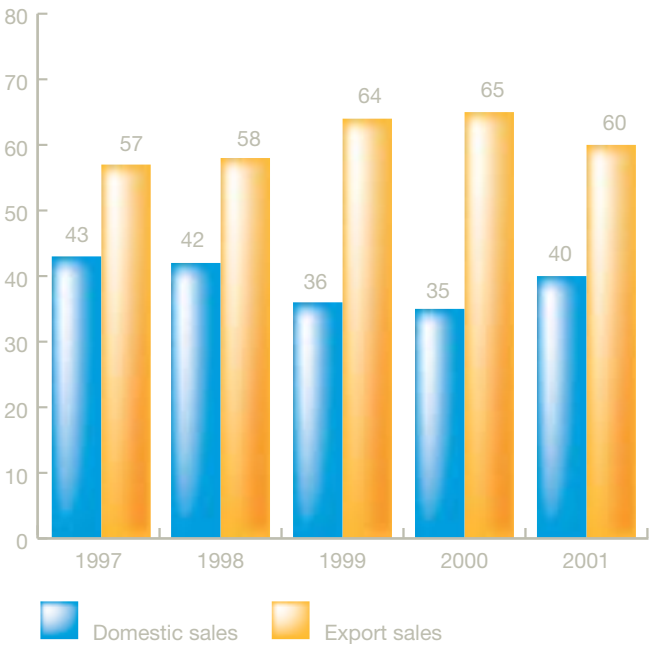
Chart 8.1.2
Car production in the UK and European Union: 1997-2001

	Number of cars produced in the UK (000s)	Number of cars produced in the EU (000s)
1997	1,698	13,246
1998	1,748	14,339
1999	1,787	14,489
2000	1,641	14,330
2001	1,492	n/a

Source: SMMT

Chart 8.1.3
UK car production – domestic versus export sales: 1997-2001

Proportion of UK car production (%)



Source: SMMT

8.2 Car sales by manufacturer

Chart 8.2.1
New car sales by manufacturer: 1990-2001

	(000s)											
	90	91	92	93	94	95	96	97	98	99	00	01
Audi VW	116	89	83	84	97	107	144	155	169	196	199	227
BMW	43	39	41	41	45	55	57	64	64	71	68	82
Citroen	61	54	65	81	84	80	76	79	77	72	85	129
Fiat	55	35	31	43	59	71	86	88	92	77	94	98
Ford	507	388	354	381	418	409	396	396	404	388	374	404
Vauxhall	323	250	267	304	310	293	283	294	283	262	297	310
Honda	32	28	27	31	38	46	50	56	61	66	69	64
Hyundai	7	8	9	9	12	14	19	26	29	28	26	27
Jaguar	11	6	6	6	7	9	8	10	12	15	15	22
Mercedes	26	21	23	21	29	33	36	43	52	62	64	77
Nissan	107	64	75	89	92	92	93	96	101	95	85	93
Peugeot	124	116	124	142	146	143	153	168	182	181	189	206
Renault	67	64	73	93	112	120	132	159	180	165	161	182
Rover	281	230	216	238	245	239	221	217	194	143	104	97
Saab	12	9	10	9	9	11	16	17	19	17	16	16
Toyota	43	41	42	52	52	54	60	72	83	78	93	109
Lexus Volvo	66	47	43	44	42	40	34	41	38	39	37	40
Others	135	118	118	109	110	124	157	190	209	398	249	278

Source: SMMT

Section 9

The future of the car in the UK

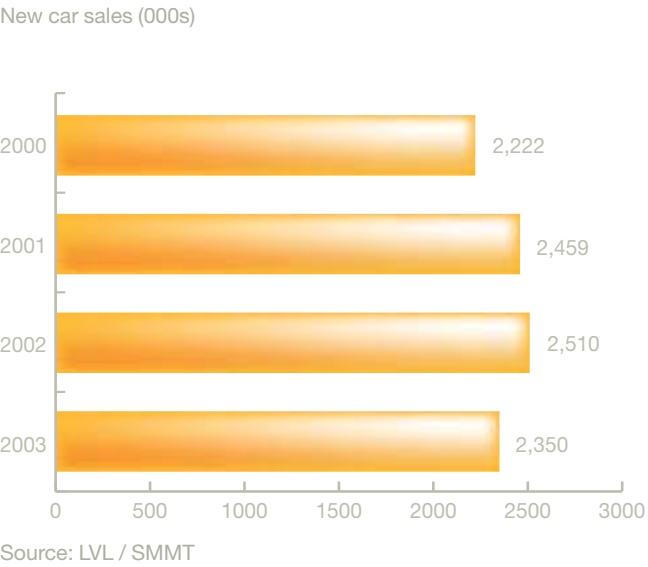
9.1	New car sales
Chart 9.1.1	New car sales forecasts: 2000-2003
9.2	Ten year transport plan
Chart 9.2.1	Future expenditure under the Transport 10 Year Plan: 2001/02-2010/11
9.3	Traffic forecasts
Chart 9.3.1	Forecasts of road traffic in England and vehicles in Great Britain: 2010
	Chart 9.3.2 Growth in car traffic: 2001-2051
9.4	Future car ownership
Chart 9.4.1	Future levels of car ownership: 1996-2031
9.5	Future emissions
Chart 9.5.1	Future emissions levels: 2000-2025
	Chart 9.5.2 Forecast of UK CO2 emissions: 1995-2020

Key motoring facts

- Forecasts by the SMMT predict that new car sales will be 2.35 million in 2003, a fall from the peak expected in 2002.
- The Government’s ten year transport plan aims to curb the growth of car use to a 17% increase in vehicles kilometres between 2000 and 2010 rather than the 21 % increase predicted without a plan.
- The ten year transport plan also hopes to reduce road deaths by 33% by 2010.
- Market Dynamics foresee an increase of 55% in car traffic by midway through the century.
- By 2037, Market Dynamics predicts 8 in 10 UK households will have a car.
- The Department for Transport forecast significant falls in future emissions of carbon monoxide, nitrous oxide and particulates. If 2000 levels equal 100 they forecast the indices to be 33, 27 and 57 respectively by 2025.

9.1 New car sales

Chart 9.11
New car sales forecasts: 2000-2003



9.2 Ten year transport plan

Chart 9.2.1
Future expenditure under the Transport
10 Year Plan: 2001/02-2010/11^{1,2}

£ billion, current prices	
Public expenditure and private investment	
Strategic roads	21.2
Railways	64.9
Local transport ³	58.7
London ^{3,4}	25.6
Other transport ⁵	2.2
Unallocated	6.7
Charging income ⁶	2.7
Total	181.9

¹ Figures consistent with the Secretary of State’s announcement to the House of Commons on 29 January 2002.

² Mainly spending in England but includes UK spending on programmes that are not devolved.

³ Includes expenditure on local roads.

⁴ Includes Transport of London and London Underground, although no assumption has been made about ongoing grant in respect of the PPP.

⁵ Includes spending on aviation, logistics and maritime, strategic transport and transport security.

⁶ It is assumed that this income will be reinvested in the transport system.

Source: Transport Finance Division / DfT

9.3 Traffic forecasts

Chart 9.3.1
Forecasts of road traffic in England and
vehicles in Great Britain: 2010

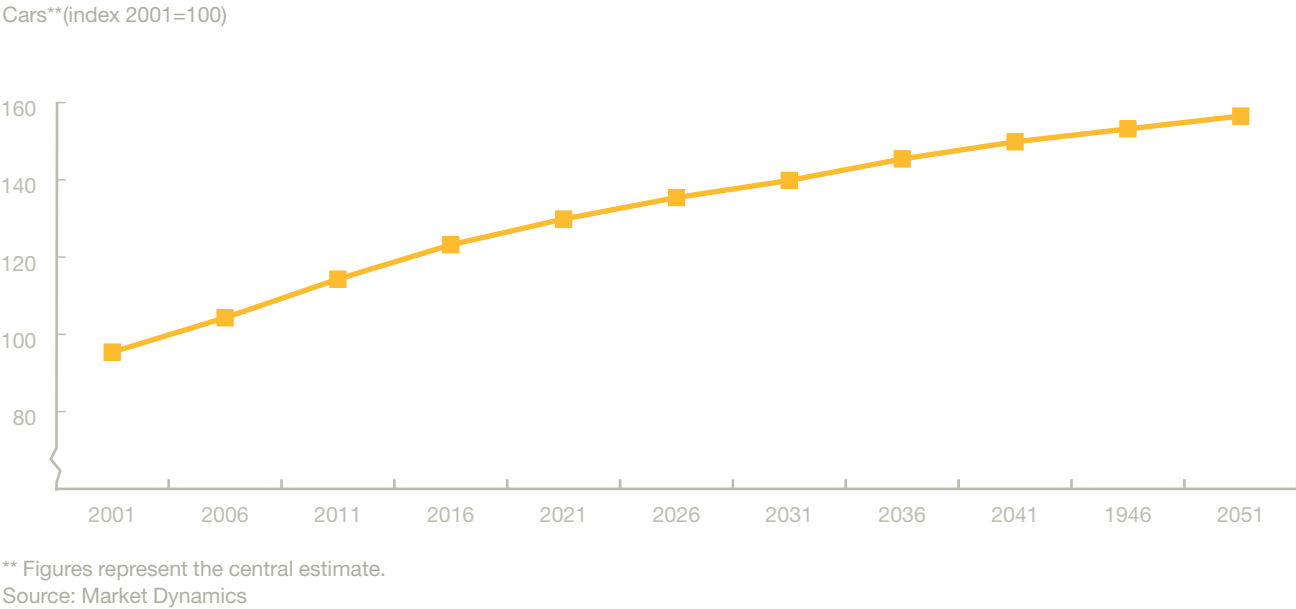
	Index 2000 = 100	
	Without ten year plan	With ten year plan
Vehicle kilometres: England		
Cars and taxis	121	117
Goods vehicles ¹	118	109
Light goods vehicles	125	123
Buses and coaches	109	118
All motor traffic ²	122	117
Car ownership: Great Britain		
Cars per person	114	n/a
Number of cars	117	n/a

¹ Over 3.5 tonnes gross vehicle weight.

² Excludes two wheelers.

Source: Integrated Transport, Economics and Appraisal Division / DfT

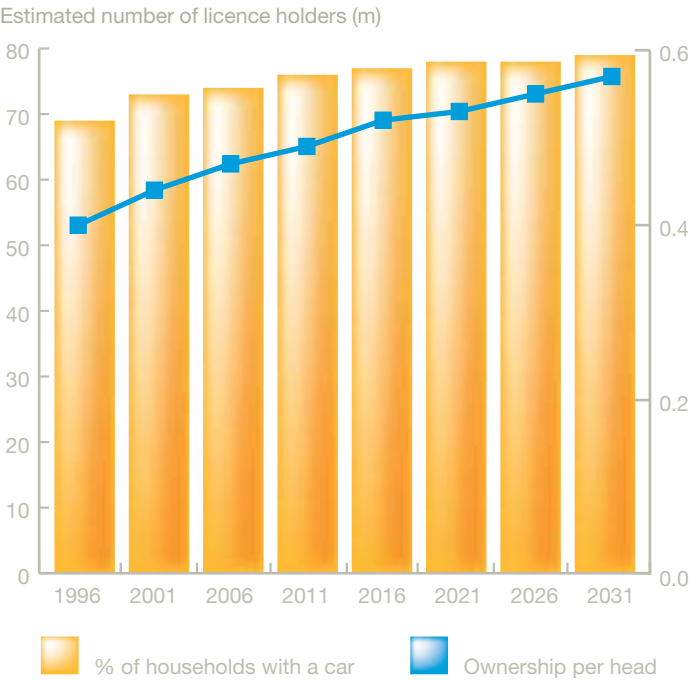
Chart 9.3.2
Growth in car traffic: 2001-2051



Cars** (index 2001=100)	
2001	100
2006	108
2011	117
2016	125
2021	131
2026	136
2031	140
2036	145
2041	149
2046	152
2051	155

9.4 Future car ownership

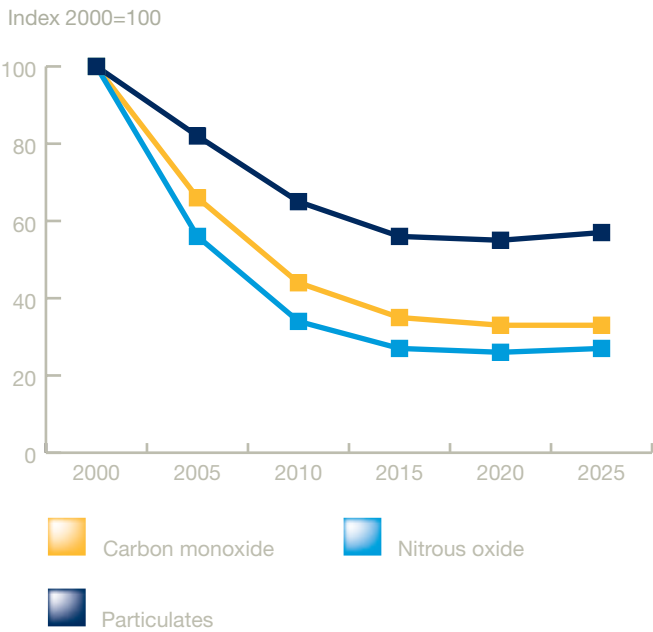
Chart 9.4.1
Future levels of car ownership: 1996-2031



Source: Market Dynamics

9.5 Future emissions

Chart 9.5.1
Future emissions levels: 2000-2025



Source: DETR / DEFRA: Report on the Review of the National Air Quality Strategy

	Index 2000=100		
	Carbon monoxide	Nitrous oxide	Particulates
2000	100	100	100
2005	66	56	82
2010	44	34	65
2015	35	27	56
2020	33	26	55
2025	33	27	57

Source: DETR / DEFRA: Report on the Review of the National Air Quality Strategy

Chart 9.5.2
Forecast of UK CO₂ emissions: 1995-2020

	Million tonnes of carbon				
	1995	2000	2005	2010	2020
Low fuel prices					
Transport	35	36	39	42	47
Rest of the economy	115	112	105	106	110
Total	150	148	145	148	157
High fuel prices					
Transport	35	36	39	41	46
Rest of the economy	115	110	108	108	109
Total	150	147	147	149	155

Source: DTI: Energy Paper 68

Section 10

European comparisons

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Key motoring facts

- Germany has the highest levels of car traffic in the EU, with 534 billion passenger kilometres in 2000, compared with 379 billion in the UK.
- The number of car sales in Germany, at 3.34 million in 2001, is the highest of the EU countries, and more than 36% higher than the UK.
- Between 1997 and 2001, new car sales in France rose by 32%, in the UK by 14%, in Italy by 1%, in Germany they fell by 5%.
- UK new car retail prices (inclusive of tax) are currently 10% above average for the EU. The lowest EU prices are found in Italy.
- European car ownership per head of population across Europe is highest in Italy, where there are 566 cars per thousand, compared with 475 in the UK.
- Spain has seen the highest increase in car ownership per head of the population across Europe in recent years - a growth of 78% between 1986 and 2000.

10.1 European roads

Chart 10.1.1
Road infrastructure: 1990-2000

	Thousand kilometres			
	All roads 1990	All roads 2000	Motorways 1990	Motorways 2000
UK	358	392	3.1	3.5
Belgium	140	148	1.7	1.7
France	808	984	6.8	9.8
Germany	547 ¹	n/a	10.9	11.7
Italy	304	n/a	6.2	6.5
Netherlands	105	126 ²	2.1	2.3
Spain	161	164	4.7	9.0
Sweden	134	212	0.9	1.5

¹ 1998 data.
² 1999 data.
n/a: Data not available.
Source: EU Countries: EU Transport in Figures (EUROSTAT)

10.2 European traffic

Chart 10.2.1
Road traffic on national territory by vehicle type: 1990-2000

	Billion vehicle kilometres									
	Cars & Taxis		Goods Vehicles ¹		Motorcycles ²		Buses & Coaches		Total	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
UK	336	379	65	80	6	5	5	5	411	468
Belgium	51	67 ³	10	8 ³	n/a	n/a	0.4	0.4 ³	n/a	n/a
France	336	402	92	116	6	n/a	2	2	n/a	n/a
Germany	483	534 ³	41	n/a	8	16 ³	4	4 ³	535	n/a
Italy	278	348 ³	47	66 ³	39 ⁴	47 ³	5	5 ³	369	466 ³
Netherlands	78	95	10	n/a	2	n/a	1	1 ³	92	n/a
Spain	81	169	24	30 ³	2	1 ³	2	3 ³	109	203 ³
Sweden	59	57	3	12	1	1	1	1	64	70

¹ Including light vans.
² Including mopeds, three wheeled vehicles but excluding pedal cycles.
³ 1999 data.
⁴ 1989 data.
n/a: Data not available.

Source: International Road Federation (IRF)

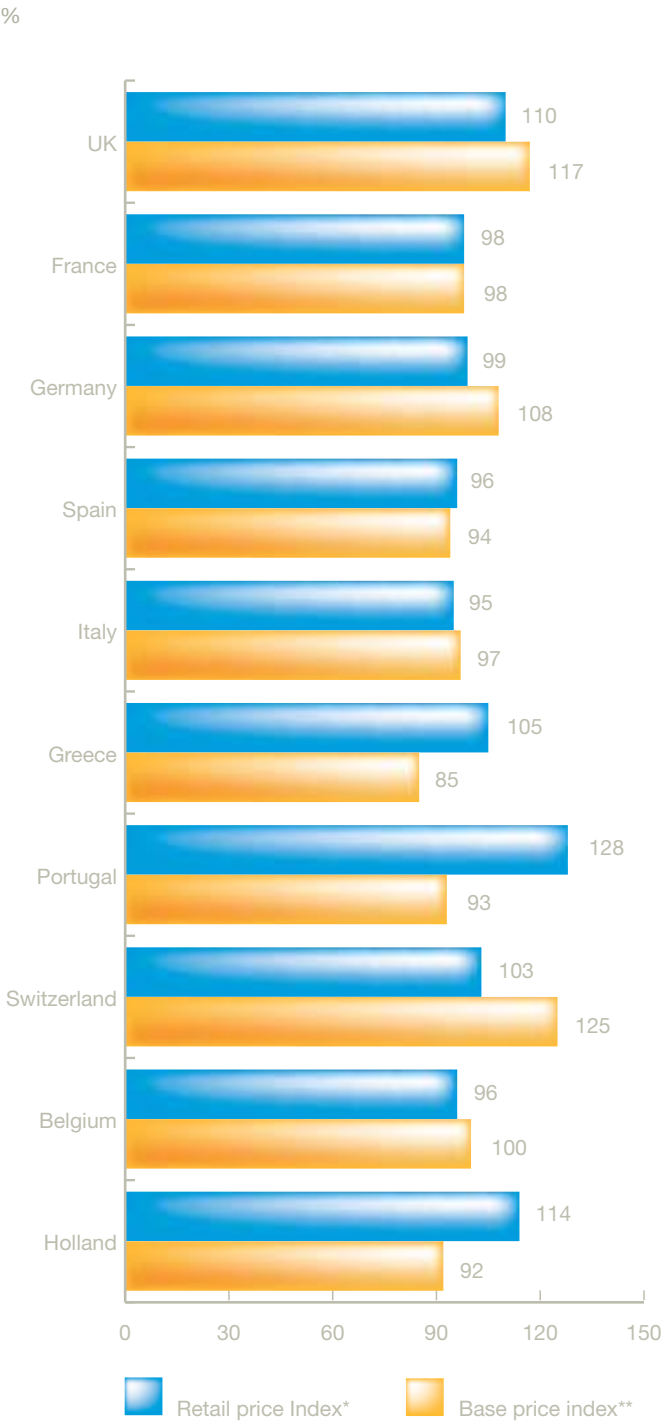
10.3 European car sales

Chart 10.3.1
New car sales across Europe: 1997-2001

	New car sales (000s)			
	UK	Germany	France	Italy
1997	2,171	3,528	1,713	2,412
1998	2,247	3,736	1,944	2,370
1999	2,198	3,802	2,148	2,349
2000	2,222	3,378	2,134	2,416
2001	2,459	3,341	2,255	2,425

Source: SMMT

Chart 10.3.2
New car prices across Europe: September 2002



* Retail prices inclusive of vehicle and import taxes in each country and is weighted by sales volume. Index 100 represents the average list price for Euro currency countries.

** Price the vehicle adjusted for specification differences between markets and excluding all taxes. Index 100 is the average pre-tax price for all Euro currency countries.

Source: eurocarprice.com

10.4 European car ownership

Chart 10.4.1
Car ownership across Europe: 1986-2000

	Cars per 1000 population				% growth 86-00
	1986	1991	1995	2000	
France	450	420	430	479	6
Germany	450	500	500	533	18
Italy	380	500	530	566	49
Netherlands	340	370	370	406	19
Spain	250	320	420	444	78
UK	360	420	430	475	31
EC	360	400	430	479	33

Source: SMMT

10.5 European accidents

Chart 10.5.1
Road deaths: OECD 30-day standard*: 2000

	Rate of road deaths in 2000 per 100,000 population ¹	Rate of road deaths in 2000 per billion vehicle kilometres ¹
UK	5.9	7.3
Northern Ireland	10.1	9.2 ²
Belgium	14.4	16.3
France	13.6	15.1
Germany	9.1	12.0
Italy	11.1	n/a
Netherlands	6.8	9.8 ³
Spain	14.5	n/a
Sweden	6.7	n/a

¹ Population and car kilometres taken from the OECD’s International Road and Traffic Accidents database.
² 1999 data.
³ 1998 data.
*International definition (Vienna Convention1968) of road death: Any person who was killed outright or who died within 30 days as a result of an accident.

Source: OECD’s International Road and Traffic Accident database

10.6 European fuel prices

Chart 10.6.1
Fuel prices across Europe: July 2002

	Pence per litre/percentage			
	Diesel tax and duty	% of price that is tax and duty	Unleaded petrol tax and duty	% of price that is tax and duty
UK	74.6	76	72.92	77
Germany	52.9	67	67.2	73
Italy	54.2	64	67.5	68
France	50.1	60	64.1	74
Belgium	49.6	57	64.0	68
Spain	43.5	57	52.7	62
Portugal	44.3	55	60.3	67
Greece	39.6	55	48.0	55
Luxembourg	40.1	53	49.4	59

Source: DTI Quarterly Energy Prices

Appendix 1: Index

Accidents		Private cars	
injuries	4.3.1	accidents	4.3.3
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forecourts	6.2.5	limits	4.2.1, 4.2.3
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traffic	9.3.1,9.3.2		
Motorways			
proportion of all roads	1.1.2		

Appendix 2: Sources and acknowledgments

Association of British Insurers (ABI)	HM Customs and Excise
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	Home Office
British Vehicle Rental and Leasing Association (BVRLA)	– Research, Development and Statistics Directorate
	Inland Revenue
Civil Aviation Authority (CAA)	
Department for Environment, Food & Rural Affairs (DEFRA)	International Road Federation (IRF)
	Lex Service
Department for Transport (DfT)*	– Lex Report on Motoring 1989-1999
– Integrated Transport, Economics and Appraisal Division	
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– National Travel Survey (NTS)	– LVL Report on Company Motoring 1995-2001
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Emmerson Hill	
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EU Countries, EUROSTAT, Luxembourg	– RAC Report on Motoring 2000-2003
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Health and Safety Executive (HSE)	
Highways Agency	
	Strategic Rail Authority (SRA)

* formerly Department of the Environment, Transport and the Regions (DETR), Department of Transport, Local Government and the Regions (DTLR)

