

RAC
Report on
Motoring
2008

Report One

20

Years of Motoring
1988/2008

RAC

Introduction

Twenty years ago, the first RAC Report on Motoring¹ was published. Since then, the RAC Report has become widely regarded as the voice of Britain's motorists.

In celebration of its twentieth year, three special RAC Reports on Motoring will be published in the course of 2008, of which this is the first.

Drawing on 20 years of the Report, new research amongst Britain's motorists, official Government statistics and various other sources, this first RAC Report on Motoring 2008 provides a definitive picture of how motoring in Britain has changed over the last 20 years.

¹ The RAC Report on Motoring started life 20 years ago as the LEX Report on Motoring. The name changed in 2000 following the sale of RAC Motoring Service to Lex Services plc. For clarity, all previous versions are consistently referred to as the RAC Report on Motoring.

▮ The most aspirational cars from 1988, as chosen by motorists for the RAC Report on Motoring 2008.

Foreword



Peter Bottomley MP
Former Minister for
Roads and Traffic, 1986-9

In 1988 we were coming to the end of the boom years of the Thatcher period. In social change, we had moved from 'a world where we had nothing' to 'a world where we had something' – increasing home ownership, car ownership and other belongings.

There was change in the socio-economics of driving – a pursuit that, prior to the 1980s, was often considered a middle-class, male, middle-aged experience. If we look forward to the present day, the motoring population truly represents a cross-section of society. Driving is no longer a class, wealth or age issue; it's accessible, affordable and brings freedom.

So what else changed? In the 1980s, the increasing power of the media highlighted how communication could help change attitudes and public opinion. For example, the rise of consumer programmes such as 'That's Life' worked wonders in raising the road casualty reduction agenda to the front of people's minds. Strong public engagement allowed us to turn the corner on drink driving as people took on the messages and pressured friends to do the same. Likewise the use of child restraints.

I do not believe that legislation and enforcement are the key to making a difference. Driving is in effect the greatest form of cooperation we encounter in life. It involves taking personal responsibility for your actions, knowing what to do, seeing others doing it and cooperating so that we each reach our destination.

It is through such cooperation, that we can encourage responsible attitudes to driving. Look at the behaviour of taxi drivers – "I'll let you out because I expect the same in return" – it's the belief that by giving, you receive.

We need to try and instil such cooperative attitudes in the new drivers of tomorrow, showing them by example how to behave on our roads and using communications rather than new penalties to spread correct behaviour behind the wheel.

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Executive summary

This Report explores in greater detail the changes that have occurred over the last 20 years, whilst also looking at how we can make the next 20 years of motoring more sustainable.

There are a series of key findings in the report, which are described here:

➤ There are more drivers, more cars and more traffic, yet less road space now compared with 20 years ago.

➤ 92% of motorists think we are more dependent on our cars and more car focused than in 1988.

➤ Today we have safer cars that we feel more comfortable in and that are also more reliable.

- There has been an increase in aggressive driving with one in three motorists saying they have been a victim of road rage or aggressive driving 'to the extent that they have felt physically threatened', that's nearly 10 million of us.
- 60% of motorists point to the 'cost of motoring' as one of the biggest changes over the past 20 years. Yet this report finds that the cost of motoring has dropped in real terms.
- The last 20 years have seen a jump in the number of motoring offences.
- 66% of motorists accept 30mph speed restrictions on local, urban roads. However, over half of drivers now believe that the speed limit on motorways should be increased to 80mph.
- The strength of opposition to drink driving is hardening amongst Britain's motorists, with 76% supporting a reduction in the drink drive limit from the present 80mg to 50mg.
- Almost twice as many motorists now use buses, coaches and trams compared with 1988, and the use of trains by motorists has increased by 56%.
- 72% of motorists underline the pressing need for improvements and investments in public transport, if they are to make the shift from their cars.

What are the biggest changes in the past 20 years of motoring?

(motorists chose up to three)

- Top three answers (in order)
- increased cost of motoring
 - more aggressive driving
 - speed cameras have affected the way we drive



What are the biggest changes in the past 20 years in cars?

(motorists chose up to three)

- Top three answers (in order)
- improved safety
 - improvements in technology
 - cars have become more reliable



What are the biggest changes in the past 20 years in the way that you personally use your car?

(motorists chose up to three)

- Top three answers (in order)
- more reliant on it for more journeys
 - more reliant on it for pleasure (e.g. day trips)
 - do more shorter journeys



“ Back in the 80’s I drove a Mk5 Cortina and a Capri - I still own a Capri today. I really miss the character of old cars - car parks today are filled with cars that all look the same. I struggle to identify with modern cars - they’re all faceless blobs with no personality of their own. That’s why I love my Capri.

**Steve, motorist from
Cambridgeshire**



↳ Ford Capri:
The most aspired to car
in 1988, as chosen by
motorists for the RAC Report
on Motoring 2008.

Chapter One

How has motoring changed?

How has motoring in Britain changed over the 20 years of RAC Reports on Motoring? In 2008, is it very different to how it was in 1988? Or, when you scratch the surface, are things the same as they always were? We look at four key aspects of motoring to reveal what has really changed.

The growth in motoring in Britain

The big story over the last twenty years is the extent to which the car has embedded itself in our everyday lives.

There's been enormous growth in motoring in Britain over the last 20 years. Compared with 1988, there are now 7.6 million more drivers and 9.34 million more cars using largely the same roads.

The serious growth in car ownership began in the mid-1950s.

Then, cars were the preserve of the few. Today, they are an integral part of ordinary, everyday British life.

This growth in ownership has fundamentally changed our lives. The freedoms a car brings have given us greater choice in where we live and work, and how we spend our time.

Fig.1 The growth in motoring



Fig.2 Total traffic on major roads vs the total length of major roads



The first RAC Report on Motoring found that, in 1988 most households in Britain owned a car and most adults had a driving licence.

It would be wrong, however, to think little has changed since then – it has.

The big story over the last twenty years is the extent to which the car has embedded itself in our everyday lives.

The figures² show a huge growth in motoring.

Since 1988:

- The number of households with a car grew by 39%, from 14 to 19.5 million.
- The number of households with 2 or more cars grew by 95%, from 4.3 to 8.4 million.
- The total number of drivers³ grew by 29%, from 26.1 to 33.7 million.
- The number of women drivers grew by 50%, from 10.2 to 15.3 million.
- The total number of vehicles on our roads grew by 46%, from 23.3 to 34.0 million.
- The number of cars on our roads grew by 49%, from 18.9 to 28.2 million.

Today, three-quarters of households have a car, seven out of ten adults hold a licence and there are more than eight cars for every ten drivers.

Arguably for the first time, we can genuinely say there is near-universal access to a car in Britain.

However, not only are there a lot more cars than 20 years ago, we're also using them more.

Again, since 1988:

- The average number of car journeys we make increased by 11%, from 387 to 430 per year.
- The total amount of car-miles driven increased by 32%, from 190 to 250 billion per year.

A lot more cars and a lot more drivers mean a lot more traffic or, rather, congestion on our roads. The problem is compounded by the fact that most of the increased traffic is concentrated on the same roads we were using 20 years ago. Of the 12% growth in the length of our roads, the majority has been on minor roads, which, whilst accounting for 87% of Britain's road length, only carry around 36% of all traffic.

Since 1988:

- The total traffic on our roads grew by 35%, from 234 to 315 billion vehicle-miles.
- The total length of our roads grew by 12%, from 220 to 247 thousand miles.
- The total traffic on our major roads grew by 40%, from 144 to 202 billion vehicle-miles.
- The total length of our major roads shrunk by 0.4%, from 31.38 to 31.26 thousand miles (although this is in part due to reclassification of roads).

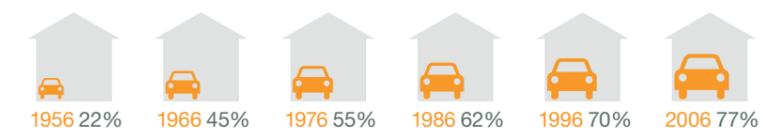
The demographics of the British driver have also changed over the past 20 years:

- In 1988 the average age was 43 and now it's 46.
- In 2008, Britain's motorists have been driving for an average of 24 years.
- The number of drivers aged 65 or over has grown from one in 10 in 1988 to one in five in 2008.

² All figures are the latest year data available from the Department for Transport (DfT) statistics at the time of writing.

³ 'Licence holders' is used as a proxy for the number of drivers, though it excludes learners and people driving on an overseas licence. The 1988 figure is an average of DfT figures for 1985-6 and 1989-91.

Fig.3 Growth in household car ownership



The cost of motoring

The real cost of motoring has fallen significantly over 20 years. But it doesn't feel like that because, in real terms, fuel prices - the most visible cost - have doubled.

Britain's motorists think the single biggest change in motoring over the last 20 years is the increased cost of motoring.

But is that true in real terms? Has the cost of motoring gone up, remained the same, or even gone down?

To get the definitive answer, a new analysis was undertaken for the 2008 RAC Report on Motoring⁴.

This reveals that, in real terms, the cost of motoring has fallen significantly across 20 years.

So although costs (buying a car, running a car and the cost of fuel) have risen, after inflation has been taken into account, it is still:

- 18% cheaper to buy and run a car, including fuel costs, in 2008 than 1988.
- 28% cheaper to buy and run a car, excluding fuel costs, in 2008 than 1988.

Over the period, the Retail Price Index - inflation - has increased by 102%.

Put another way the total cost of motoring increased to £734 from £395 a month - over the 20 years if the cost of fuel is included. Strip out fuel costs and the figures have increased to £592 from £342 a month.

Fig.4 shows that whether including or excluding fuel, the increase in the total cost of motoring since 1988 is well behind the overall increase in the cost of living.⁵

The RAC analysis also looked at buying a car, running a car and the cost of fuel in turn (see Fig.5), and found that, in real terms, compared with 1988:

- It is 24% cheaper to buy a car.
- It is 57% cheaper to run a car.
- But it costs more than twice as much to fill it up.

Or, over 20 years:

- The cost of running a car increased to £94 from £65 a month.
- The real cost of buying a new car increased to £498 from £277 a month.
- The cost of petrol increased to 117.9p⁶ a litre from 38p.
- The cost of diesel increased to 130.9p⁷ per litre from 38.4p.

So, as Fig.5 shows, since 1988 the increases in the costs of buying and running a car are well behind the increase in the cost of living, whereas fuel costs are effectively double the increase in the cost of living.

To complete the picture, the total cost of motoring was compared with the cost of public transport - bus and coach, as well as rail travel - over the same period. (See Fig.6)

This revealed that the cost of public transport has risen by double the increase of the cost of motoring.

The analysis for the 20th RAC Report on Motoring shows that although our perception and reality differ over the 20 years, on a day to day basis the spiralling cost of fuel makes us feel that the costs of motoring have increased significantly.

This feeling is compounded by the fact that the Government's annual tax take from Britain's motorist - through fuel duty, VAT, new car tax and the road fund licence - totals some £45bn.

⁴The cost of motoring takes into account service and repair costs, insurance, fuel, road tax and breakdown cover. See Appendix C for full details of assumptions.

⁵Using the Retail Price Index, the standard measure of the cost of living in the UK.

⁶This price is correct as of 11 June 2008.

⁷This price is correct as of 11 June 2008.



1988

38p would buy 1 litre of petrol



2008

38p would buy 0.32 of a litre of petrol

Fig.4 Changes in total cost of motoring vs inflation



Fig.5 Changes in the three costs of motoring

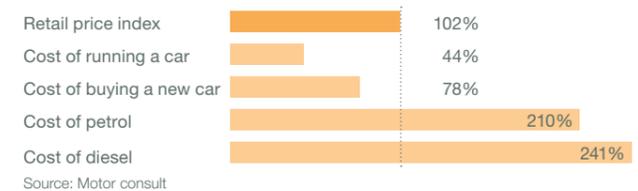
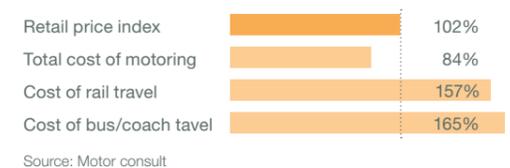


Fig.6 Changes in cost of travel





Half of us say we speed on motorways and a third of us admit to 'driving significantly above the speed limit' in built up areas.

Motoring offences: speeding

We see ourselves as law-abiding drivers. But over the last 20 years, motoring offences, particularly speeding, have increased significantly.

The vast majority of us see ourselves as law-abiding drivers and, at least on first glance, the statistics seem to reflect this.

Between 1988 and 2006⁸, the number of motoring offences dealt with by the police in England and Wales, fell from just under 8 million to a little under 5 million, a decrease of 39%.

The real story, however, is somewhat different.

In 1988, two-thirds of all motoring offences were actually 'non-motoring' offences, such as parking violations and obstruction. These are no longer dealt with by the police.

Exclude these and the 'true' 1988 level was just over 2.5 million offences.

The equivalent for 2006 is almost 4.4 million, an increase of 70%.

As Fig.7 shows, most of the increase is accounted for by the growth in the number of convictions for speeding. In 1988 this accounted for one in five of motoring offences – by 2006 it was nearly half.

Speeding is by far the most common motoring offence. Half of us say we speed on motorways and a third of us admit to 'driving significantly above the speed limit' in built up areas.

Our attitudes to speeding differ depending on the type of road. We are much more willing to stick to the speed limit in built up areas than on motorways. The 2008 survey revealed:

- 90% of us think the limit on country roads is about right at 50-60 miles per hour.
- 83% of us think the limit on urban roads is about right at 30 miles per hour.
- 74% think the limit on motorways is too low at 70 miles per hour.

Speed cameras don't help either. Three-quarters of Britain's motorists now think cameras are 'more about raising money than improving road safety'.

With the exception of speeding, we tend to obey motoring laws whilst driving. The most common lapses are:

- Overtaking using the inside lane on a motorway, admitted by a quarter of us.
- Overtaking using the inside lane in towns, admitted by roughly one in six.
- Going through a red light, admitted by one in ten.
- Driving in a bus lane, admitted by one in 14.

⁸At time of going to print, 2006 is the most recent year that data is available.

Fig.7 Motoring offences 1988 vs 2006

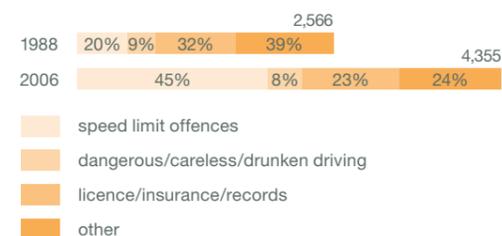
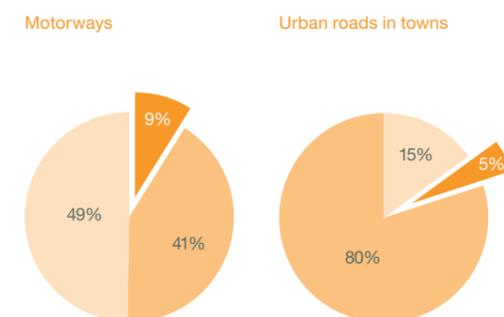


Fig.8 Attitudes to speeding



- Conformists**
The speed limit should not be broken except in exceptional circumstances
- Non-Compliant**
The speed limit is usually set below a safe level and it's acceptable to exceed it e.g. by 10mph
- Anarchists**
Speed limits don't mean much on most roads, drivers should decide themselves what's acceptable

Motoring offences: drink driving

Despite progress in reducing drink driving, it may now be time for the limits to be reduced further.

Real progress has been made since 1988 in changing attitudes and behaviour on drink driving.

Even though there remains a hard core of habitual drink drivers – and recent evidence shows it is starting to rise amongst younger drivers – this is still one of the big success stories of the last 20 years.

Today, it's typically seen as totally unacceptable to drink and drive; 20 years ago that was not the case.

If anything, the body of opinion against drink driving is hardening amongst Britain's motorists:

- Three-quarters of us support a reduction in the drink driving limit to 50mg from the present 80mg
- Three-quarters of us say it would be acceptable to random breath test every driver the police stop
- Seven in ten of us say the drink drive limit should be reduced to no alcohol at all.

↘ RAC calls for

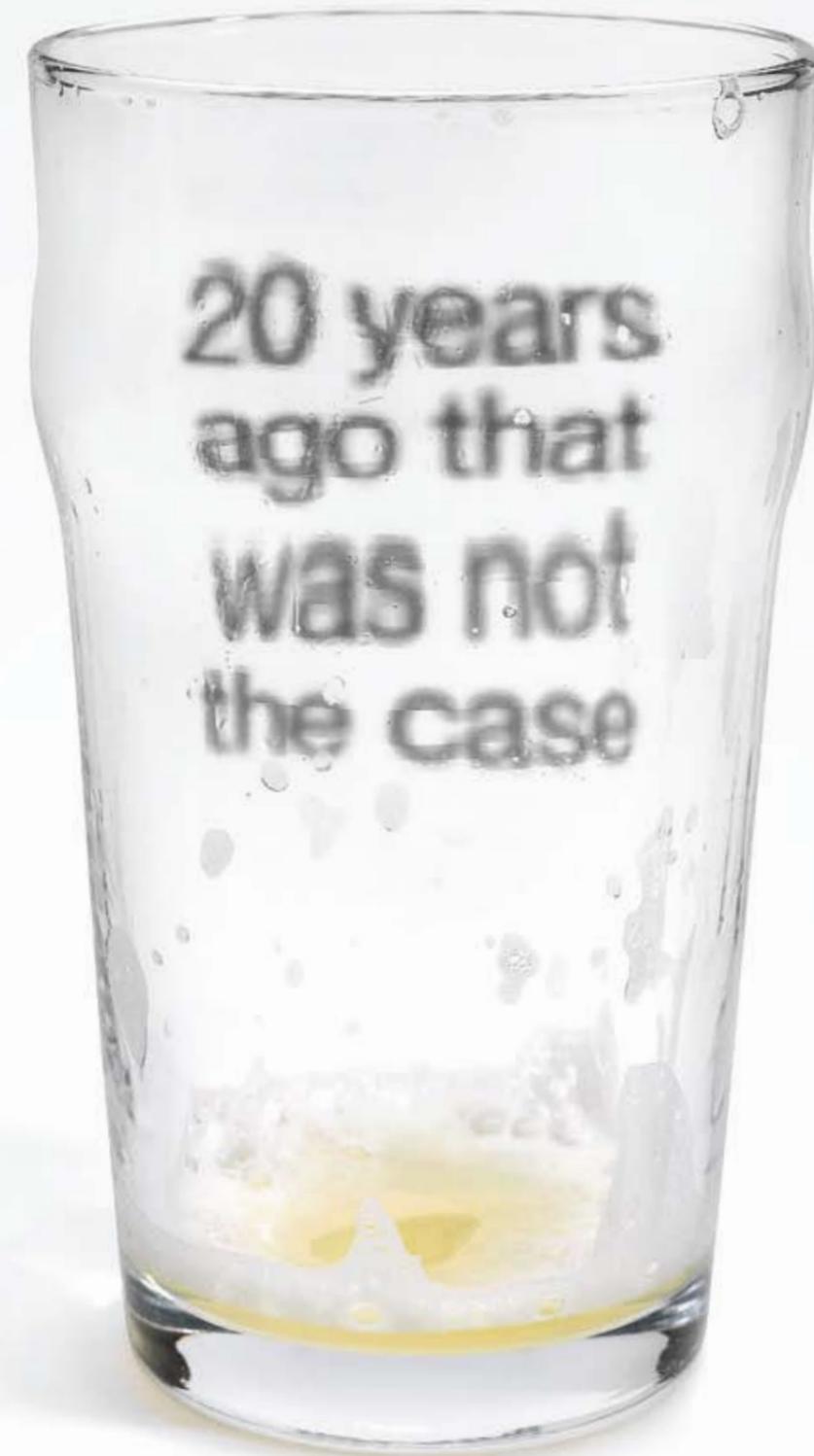
A reduction in the drink drive limit to 50mg. This reduction should be accompanied by random breath testing and continued focus on the most serious offenders.

Increased driver education to remind drivers what the limit means in practise and to help them understand the effects of 'morning after motoring' when it might have been some time since the driver last had a drink.

A nationwide audit of speed cameras to be carried out to ensure that each one can demonstrate a proven effect in reducing accidents and those which cannot, are removed.

The use of average speed cameras and the use of speed activated warning signs – believing these help to educate motorists to stay within the limit and promote safe driving behaviour rather than simply penalising.

Today, we see it as totally unacceptable to drink and drive



Being safe. Feeling safe.

Modern cars are safer. Today's roads are safer. We see ourselves as safe drivers... but we feel less safe driving. How come?

In 1988, the term 'road rage' was unheard of; today it is part of our everyday language.



Cars today are much safer than in 1988.

Air bags, seat belts, crumple zones and ABS are all standard now. They are evidence of the ever-higher safety standards to which car companies design and build modern cars.

It's not surprising, therefore, to find that three in five of us point to improved safety as the single biggest change in cars over the last 20 years.

The roads are unquestionably safer as well. According to Government statistics, since 1988 the number of deaths and serious injuries on Britain's roads has halved.

We still think of ourselves as safe drivers. Nearly everyone describes themselves as such and eight out of ten of us would go as far as to say we are very safe drivers.

And yet, despite safer cars, roads and drivers, less than a third of us (30%) say we feel 'very safe' whilst driving on the roads today.

How come?

A third of us point to 'more aggressive driving' as one of the biggest changes in motoring. Almost one in three have been a victim of road rage or aggressive driving 'to the extent that [we] felt physically threatened'.

That's nearly 10 million of us.

In 1988, the term 'road rage' was unheard of; today it's part of our everyday language. It was first mentioned in the British press in 1994 when growing stories of other drivers' aggressive driving behaviour created the need for a new phrase to describe it.

These findings echo the 2007 RAC Report on Motoring, which found Britain's motorists' concerns about driving safety to be, at over 90%, higher than for any other issue. The greatest area of concern – mentioned then by three-quarters of all motorists – was 'the behaviour of other drivers'.

The problem here, though, isn't some mythical 'other drivers' driving aggressively – it's us.

Nearly half of Britain's motorists readily admit to aggressive driving behaviour such as 'shouting, swearing and gesturing rudely at another motorist'.

That's over 15 million of us.

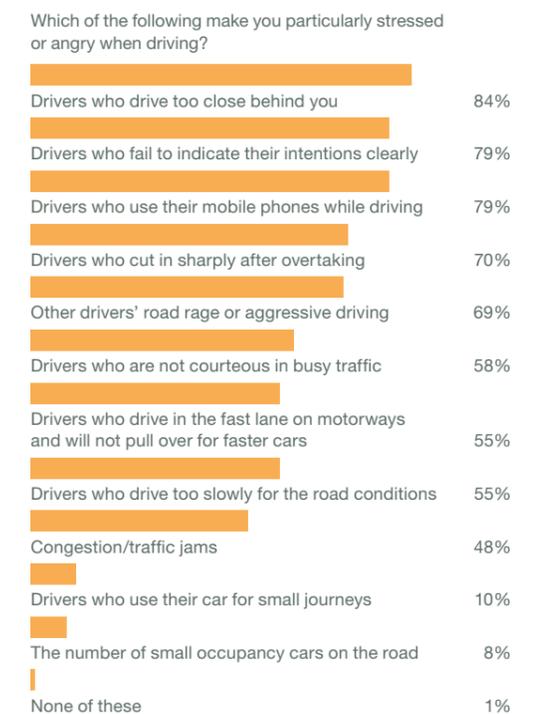
Over 20 years, we've got safer cars and safer roads. But we don't feel safer whilst driving.

That won't happen until we accept that we're all 'other drivers' to everyone else.

↘ RAC calls for

A return to more 'courteous driving'. Driving conditions have changed since the majority of motorists passed their tests 24 years ago, and so have the stresses and frustrations of motoring. We believe that driver training and re-education courses have an important role to play here.

↘ Fig.9 The stresses of driving



“When I buy a car I look for something with the wow factor that will turn heads, but also provides value for money in terms of both purchase and motoring costs. My top priorities would be air conditioning and a CD player.

**Sue, motorist from
Leicestershire**

Chapter Two

What we look for in our cars

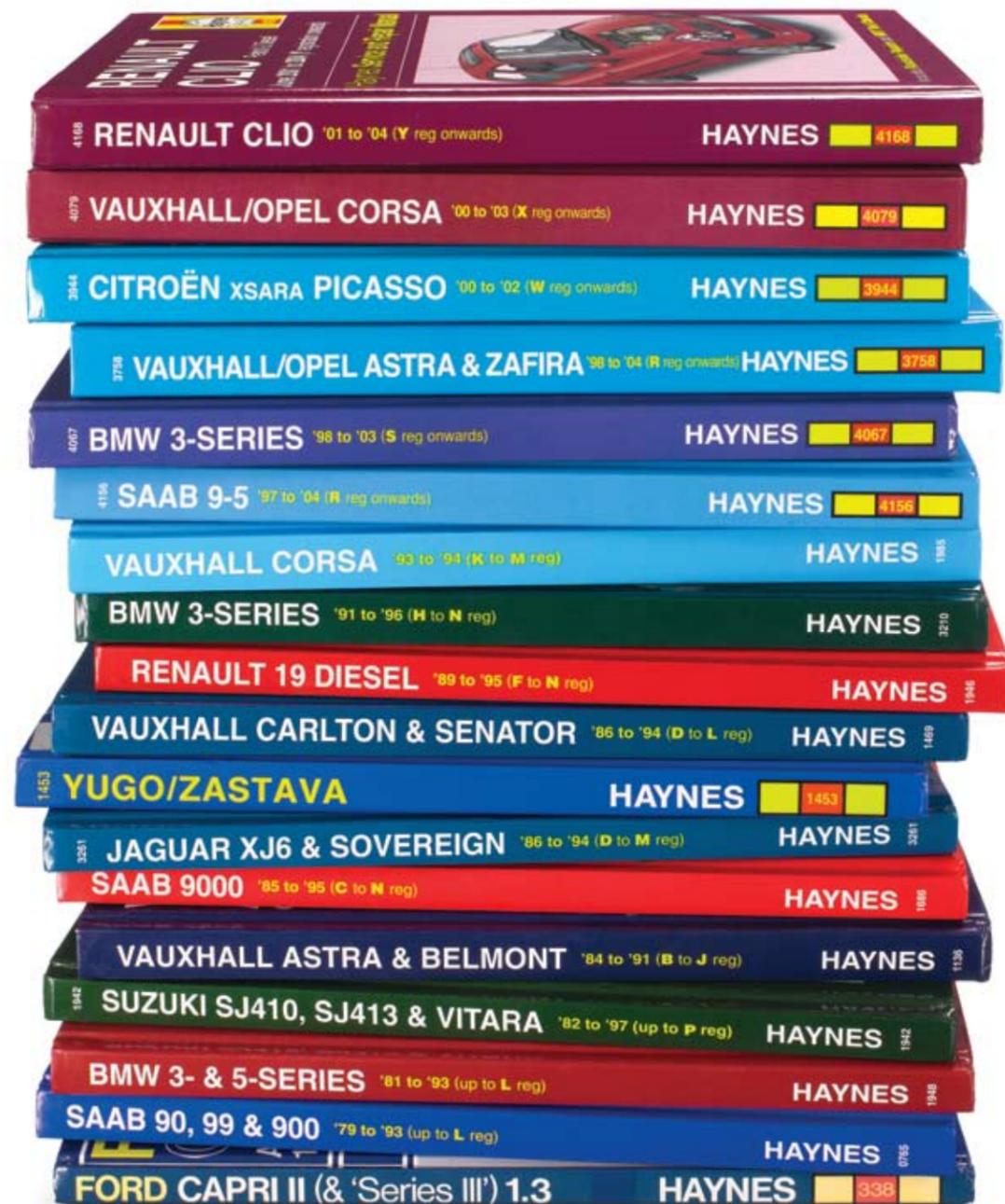
Twenty years of improvement has transformed the cars we drive. As a result, we now take quality and reliability for granted. So how do we choose a car and how has this changed over 20 years?



Features

Over the last 20 years the issues affecting our choice of car have changed enormously. The environmental impact and size of our car are as important as its make and colour. But what is underlying these changes?

Fig.10 Brands and models of cars over the years



Features

If we compare the top cars of 1988, it is clear to see that today's equivalents are better. They are better designed, better equipped, more comfortable, more secure, more technology-rich, more complex and, generally, much, much easier to drive.

They provide better information and entertainment as standard through technology such as Sat-Navs, rear seat DVDs and MP3 players. All of which frees us up to view our cars in a different way to 1988.

Brands

In brand terms, there have been two big, inter-connected stories over the last 20 years.

The first story is about the near disappearance of Britain's leading mass car brand, Rover, and the parallel rise of the European and Japanese brands.

The second is about premium brands becoming more affordable and accessible to mass market customers who would previously have seen such brands as beyond their reach.

What we aspire to, 1988 vs 2008

Motorists were asked to choose the car they aspired to drive 20 years ago, and the make of car they aspire to drive today.

Top three cars we aspired to in 1988:

Ford Capri

Jaguar XJS

BMW 3 series

Top three brands we aspire to in 2008:

BMW

Mercedes-Benz

Audi

The last five or so years have seen the rise of a new brand category in the car market – 'mass premium', led by Mercedes, BMW and, most recently, Audi.

We only need to look at the top three brands we aspire to today, to see the extent to which these now dominate what we want to drive.

Types of cars

Over the past 20 years the range of cars on offer has increased dramatically.

We are buying smaller cars – though small cars are actually getting bigger – with less powerful but more efficient and cleaner engines. In part, this shift to smaller cars and more efficient engines is driven by cost and lifestyle choices. We're also a lot more willing, whilst there's a financial incentive to do so, to drive diesel cars.

It also reflects a much greater awareness of the environmental and the social cost of motoring. We're using our cars less for long journeys and more for shorter ones, such as shopping and commuting. Smaller cars and engines not only make more sense, they do less environmental damage.

Motoring and technology

It's very clear that the cars we'll be driving in 20 years' time will be near-unrecognisable compared to those we were driving just 20 years ago.

But can technology do more than just give us better and better cars?

Can it make a serious contribution to helping us achieve a sustainable future for motoring?

These are big and important questions that affect the future of everyone in Britain.

Environment

The RAC Report on Motoring has looked at the views of Britain's motorists on issues relating to the environment from the very start.

Twenty years ago, the environment was just starting to appear on motorists' radars via very specific, car-related issues, such as lead-free petrol, exhaust fumes and catalytic converters. Today, it has moved centre-stage. There is now widespread and growing support for the environmental agenda amongst motorists.

For example, in 2008:

- More than two-thirds of us, 'would buy a more environmentally-friendly car if the tax incentives were better'.
- Half of us say we 'carefully consider...CO₂ emissions when buying a car'.

The green message is getting through to motorists – the challenge now is to translate it into hard action.

↳ Motoring and our environment

How to reconcile motoring and the environment is one of the greatest challenges we face. The King Review of Low Carbon Cars has set out the role that more efficient vehicles, cleaner fuels and smarter consumer choices can play in reducing carbon emissions. But what else should be done?

What will be most effective in translating positive support into changes in behaviour?

What would work with Britain's motorists and what would risk being counter-productive?

These are big and important questions for the future of motoring in Britain that will affect us all.

Twenty years of improvements

Twenty years of improvements have transformed the cars we drive and delivered major benefits for Britain's motorists.

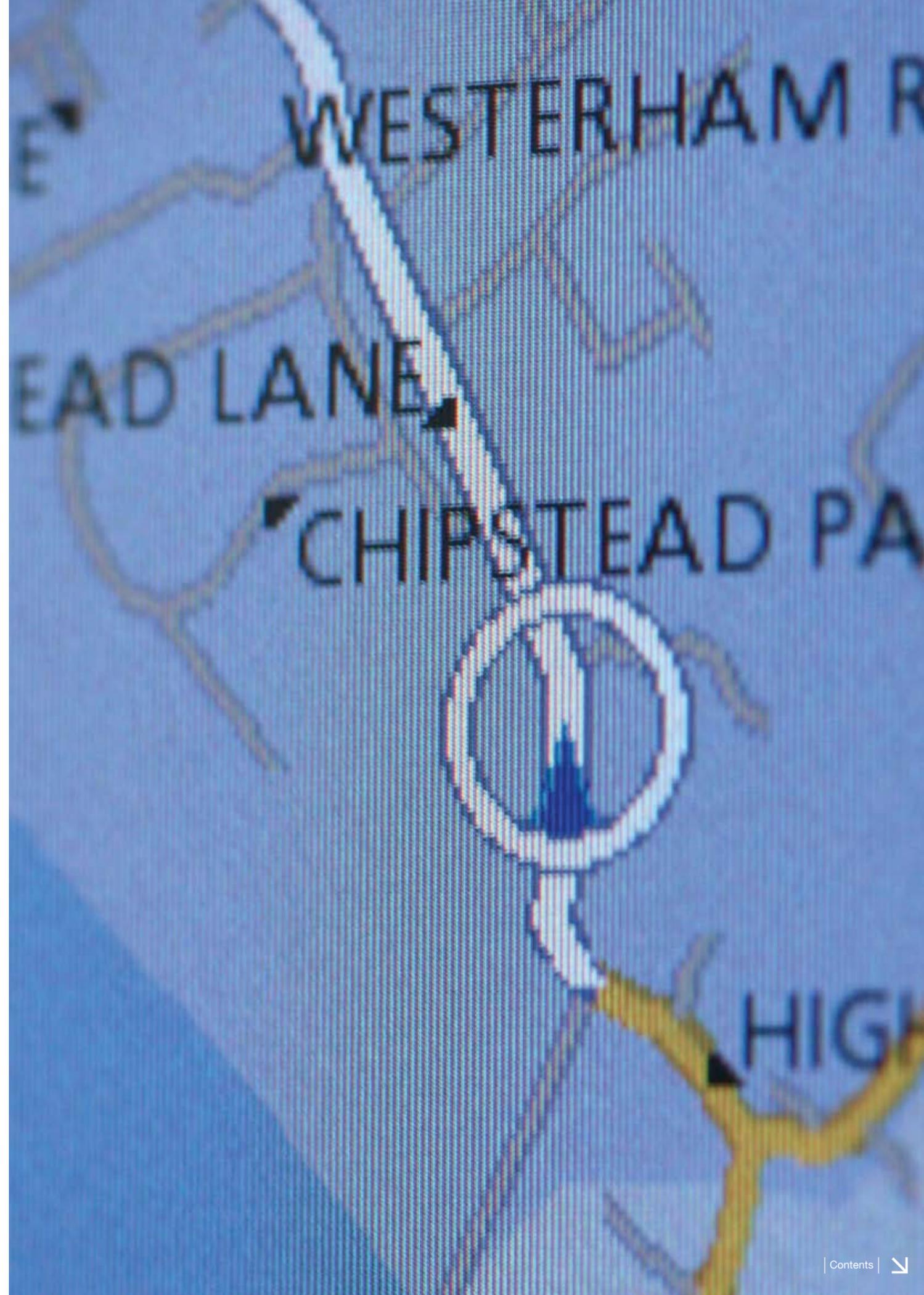
1. We're driving much better cars today than in 1988. Put this alongside the fall in the real cost of buying a car and, in 2008 we're getting a lot more car for our money.
2. The actual process of driving a car nowadays is much less demanding than 20 years ago – even though what happens outside the car frequently tempers our enthusiasm for the experience as a whole.
3. The in-car environment is more comfortable and enjoyable. Whilst it's made the time we spend driving more pleasant, it's also led us to become 'cocooned' and more tolerant of congestion. We now accept journeys taking longer, so long as we've got our phone, someone to chat to, our music to listen to, and so on.

Together, these show how the relationship between Britain's motorists and their cars has changed and grown more complex in 20 years.

As they have become better and more commonplace, the way we think of cars has changed.

In 2008, they are not so much taken for granted as assumed as everyday necessities.

One of the greatest innovations over the past 20 years has been satellite navigation systems.



“Certainly car use is sustainable, given sensible planning of road systems, ongoing car design and driver training. I really could not live without my car. Public transport is inflexible, time consuming and no use at all in rural areas. Secondly, our use of out of town supermarkets plus the sheer weight of a shopping load makes a car essential.

John, motorist from Nottinghamshire

Chapter Three

Is it sustainable?

Motoring in Britain has increased over the last 20 years. We think we are now more dependent on our cars, and more car focused than in 1988. But do we think this is sustainable?

Our increased dependence on cars

Today, society and the lives we lead are increasingly organised around the assumption of having access to a car. So much so, 9% of motorists say they never walk.



Nine out of 10 motorists think Britain has become more car-dependent in the last 20 years. Half of us say it's because we're making more journeys, and a third that we're using our cars more for shorter journeys. This is borne out by the facts.

There are many reasons for our increased dependence on cars. Some reflect their greater accessibility and affordability. Some reflect an actual, or perceived, lack of realistic alternatives. And some reflect broader changes in our society.

Take walking as an example. Between the late 1990's and 2006, the average number of journeys made on foot fell by a quarter – from 328 to 249 per year. (There has been a similar decline in cycling, which also fell by a quarter across the same period, from 21 to 16 journeys per year.)

In 2008, 9% of motorists say they never walk. The car may be what people use instead, but the fundamental point is that we're losing the habit of walking. This is the real area for concern – not least because of the implications for our personal well-being and health.

Ask why we're stopping walking and we get into even deeper social changes. Today, fewer children now walk (or cycle) to school, largely as a result of more general fears about their safety, compared with 20 years ago. And, reflecting the health point above, there are now well-known concerns about the rise in obesity amongst children as a result of this.

The growth in out-of-town supermarkets over the last two decades means we now do bigger, less frequent shopping trips further away... which, in turn, means that it's doubly impractical for us to walk, for instance, distance times volume of shopping.

Effectively, we now need a car to go to the supermarket.

50 years ago it was much easier to live without a car since most of what we needed was within walking distance or easily-reached by public transport.

Now, it's not so easy. Society and the lives we lead are increasingly organised around the car. And that is recognised, pretty much universally, by Britain's motorists.

How we use our cars

The most common uses are still for shopping – 91% of us use our car to shop, up 4% from 1988 – and for work.

20 years ago, most people (61%) with a car used it to go to and from work, whilst a third said they used it for 'travel in connection with work'. Today, about half of us use our car to go to and from work and 42% use it for 'travel in connection with work'.

This suggests overall, the proportion of motorists who use their cars for work-related reasons has not changed that much since 1988. But, given there are now nearly 8 million more drivers and 11 million more cars on the roads than in 1988, it means that the numbers have.

Add to this the one in five who use their cars for the school run and the three in 10 who use a car to ferry children to and from social or leisure events... And it all adds up to a lot of extra traffic on our roads, concentrated around mornings and evenings.

All of a sudden, it's very clear why our roads get clogged up.

A changing picture

There is now evidence that our attitudes and behaviours towards car usage are changing and a subtle but fundamental shift in our car-dependency is taking place.

Taking Britain's motorists as a whole, our research shows our use of cars going up over 20 years. There are more cars on the road. There are more drivers. Although we make shorter journeys, we do more of them.

But individually a different picture emerges.

The RAC Report on Motoring uses two key attitudinal measures of our car-dependence and both show significant changes across 20 years. The most dramatic has been in our attitudes to public transport. Today, 62% of us say 'I would use my car less if public transport was better'. That, as Fig.11 shows, is a complete turn around from twenty years ago, when 70% of us said we would not.

The other change is that in 1988, 84% of us agreed 'I would find it very difficult to adjust my lifestyle to being without a car'; in 2008, it's now fallen to 73%.

The evidence suggests that our attitudes have only really started to change in the last few years. Two years ago, the number of motorists saying they'd find it difficult to adjust their lifestyle to not having a car stood at 87%; in 2007 it fell to 81% and this year it's down to 73%. Which means the one in six motorists who, just two years ago, said they'd find it very difficult to adjust no longer say that. The tipping point was 2004, when the number of motorists saying they'd use their car less if public transport was better passed 50% for the first time.

Crucially these changes in attitudes are starting to translate to actions.

- We're starting to use our cars less than 20 years ago. In 1998, we drove an average of 10,200 miles a year. That's down to 9,010 miles a year – a drop of around 10%.
- Compared with 20 years ago, the proportion of us who drive more than 12,000 miles a year has fallen from 26% to 15%.
- Those of us who drive less than 6,000 miles has increased from 32% to 43%.

And, not only has the amount we each drive fallen by about 10% over 20 years, but this year we're driving a little less than we did last year.

The wider picture is also changing. Across 20 years, there's been a major increase in motorists using public transport not instead of, but alongside their cars.

Since 1988, the number of motorists who also use the train or tube has increased by a third; and, for buses and trams, the number has increased by a half.

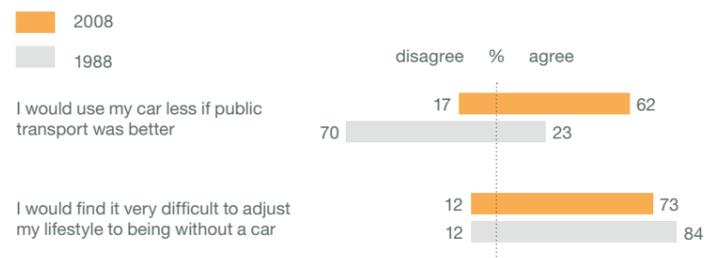
All this points towards a slow, subtle but still fundamental shift in our car-dependency.

Two changes are happening together:

- Firstly, we are starting to use public transport more, where it is a feasible alternative, especially for longer journeys.
- Secondly, we are using our cars more for shorter more 'personal' journeys and commuting.

The key to making it work is the quality, availability and integration of public transport.

Fig.11 Dependence on the car, 1988 vs 2008



RAC calls for

A recognition that there will always be some reliance on the car, particularly in non-urban locations where access to public transport is limited. Different approaches will therefore be required to fit urban and rural locations.

The Government needs to provide viable transport alternatives to the car, rather than simply penalising the motorist.

Upfront investment to provide a safe, affordable and reliable public transport system that can help incentivise motorists out of their cars.

Fig.12 Usage of modes of transport, 1988 vs 2008

Use of a public bus/tram



Use of a public train/tube



We're not replacing our cars with public transport, but integrating public transport as an option alongside our car



Our views on the future

The bad news is that, unless things change, we can't see an attractive future for motoring in Britain. The good news is that our concerns about congestion and the environment are now coming together to create a force for change.

Two different motoring issues are coming together to change attitudes and behaviour.

The first issue is long-term worries and frustrations about rising congestion. Today, not only do most of us think that 'congestion seems to be getting worse every day', but even more of us expect it to get worse in the future.

The 2008 RAC Report on Motoring asked Britain's motorists what measures they think will need to be in place 20 years from now to manage traffic:

- 58% said drivers will have to pay to drive in all cities
- 58% said there will be tolls on all motorways
- 51% said gridlock on our roads will become the norm
- 51% said cars will not be allowed into city centres
- 46% said all roads will have speed cameras.

This view, that congestion is bad at the moment and will be worse in the future, takes us to two quite different places.

On one hand it takes us towards the changes in attitudes and behaviour we've started to see in recent years as we question the sustainability of our driving habits.

On the other is a near-stoic acceptance that we've just got to learn to live with congestion. This, in turn, feeds an increased acceptance that much harsher traffic management measures will be necessary.

Essentially unless things change – we can't see a particularly attractive future for motoring in Britain.

On their own – and no matter how strongly we say we feel – our concerns around congestion haven't been enough to bring about any significant change in our attitudes or behaviour. But that may be changing. Over the last few years our concerns about congestion have started to combine with a growing awareness of our environmental responsibilities in all areas of our lives, not just motoring.

But motorists' differing attitudes to the sustainability of current car usage highlights how far there is still to go. When questioned about how sustainable we think our use of cars will be in the future:

- Two-thirds of us (65%) say 'our dependency on the car' is sustainable.
- Two-thirds of us (66%) say 'the increasing number of cars on the road' is un-sustainable.

Measures to manage traffic and reduce congestion

The last 20 years have seen a host of new initiatives being introduced by the Government and local authorities to manage congestion.

These range from hard-shoulder running and car sharing lanes to road pricing.

Although the majority of motorists believe 'tougher steps should be taken to reduce congestion', views on implementation differ. Three in five see road widening and hard shoulder running as having the greatest impact in reducing congestion. Bus lanes and speed cameras (27% and 22% respectively) were seen as the least effective.

Four in ten people disagreed with 'the principle of road pricing in order to reduce traffic' against three in ten that agreed with it. Similarly, its effectiveness was questioned, with almost three quarters saying 'road pricing does not reduce traffic, it only creates the same problem elsewhere'.

RAC calls for

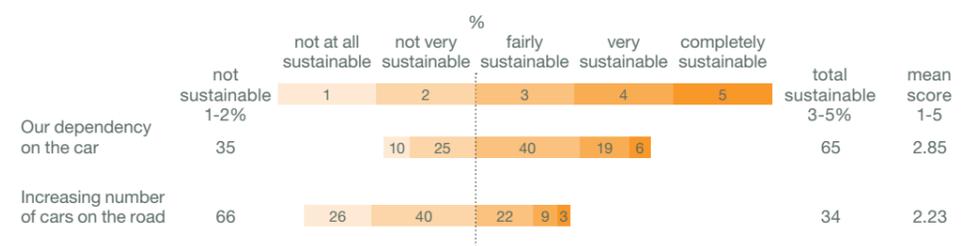
A better informed debate on the various alternatives to deal with congestion.

More done to enable lifestyle choices that reduce congestion. For example, increased investment in safer cycle routes to schools, to measures to incentivise car sharing schemes.

Hard shoulder running and lane expansion to be rolled out on all suitable motorways, with thorough feasibility analysis and targeted public communication and driver training.

Confirmation from Government that profits from any road pricing schemes will be re-invested in roads and public transport – no ifs, no buts. This should help to address public scepticism about road pricing and enable an open debate about the difficult challenges we face.

Fig.13 Sustainability of car usage
Looking forward, how sustainable is our use of cars in the future?



Conclusion

Looking back over the past 20 years has told us a great deal about how motoring and Britain has changed.

Motoring has changed dramatically over the last 20 years, and today we are more reliant on our cars than ever before. This year's Report on Motoring has shown that there are now more drivers, more cars and more traffic, yet less road space than 20 years ago, leading to a surge in congestion. The journeys we make are shorter and more localised, and delays are more likely to cause us stress. The effect of this has been a sharp rise in aggressive driving which, combined with growing levels of congestion, has meant that the vast majority of us no longer enjoy driving.

This year's report also reveals that despite the perception that the cost of motoring has spiralled, it has in fact increased at a much slower pace than the cost of living (inflation) – even when rising fuel prices are taken into account. The belief that the cost of motoring is rising sharply is therefore a myth – particularly compared with the rising cost of using public transport. The reality is that motoring has never been more accessible.

Whilst we have safer cars and see ourselves as safe drivers, many of us now feel less safe on the roads. We blame other motorists for this – yet we are all 'other drivers' to everyone else. There is a need for motorists to accept responsibility for their actions and RAC is keen to foster a return to more 'courteous driving', and intends to contribute and lead this debate over the coming months.

Over the past 20 years, there has been a sharp reduction in the number of motorists who drink drive. We are now in the position to take this further. Our research showed motorists want to see stiffer penalties combined with greater detection to further stamp out the problem. RAC believes there should now be a reduction in the drink drive limit to 50mg. RAC would also like to see the introduction of random breath testing, combined with increased education to help motorists better understand the 'morning-after' effect of drinking and driving.

While motorists accept the present speed limits on urban roads they want to see a change to the limit on motorways. In addition, many motorists see the rise in speed cameras and fixed penalty notices as revenue raising devices rather than improving road safety. It is clear that there needs to be an education programme about speeding and road safety. But before this, RAC believes there should be an audit of speed cameras to ensure that each one can demonstrate a proven effect in reducing accidents and those that cannot, are removed.

Having analysed the key changes, the key question is now: how can we make motoring more sustainable over the next 20 years? Despite the fact that our research indicates attitudes and behaviour are gradually changing, motorists have a bleak outlook and are increasingly accepting congestion as inevitable. To resolve this paradox, RAC believes that a combination of encouraging smarter driving techniques, enabling lifestyle choices and better use of existing road capacity, through active traffic management, will have a positive impact on congestion.

Overall this year's Report on Motoring shows we are at a crossroads. Levels of congestion and concerns about the environment mean that retaining the status quo is no longer an option. Britain's motorists, all levels of Government and others need to come together to formulate a long term plan that addresses environmental and capacity changes, and offers a viable and affordable range of transport options for motorists and non-motorists alike.

Appendix A

About this report.

Drawing on 20 years of the Report, new research amongst Britain's motorists, official Government statistics, and various other sources, this first 2008 RAC Report on Motoring provides a definitive picture of how motoring in Britain has changed over the last 20 years.

The research for the Report was carried out for RAC by Quadrangle. A total of 1,116 motorists shared their views on motoring in 2008 and how it has changed since 1988 in an online survey during March and April 2008.

In addition, a special analysis of how the costs of motoring have changed over 20 years was commissioned from Go Motoring Ltd, with data from Motor Consulting and Management Ltd.

The Report was prepared under the overall editorial control of Tracey Crouch, Head of UK Public Affairs, and has been guided by the expert contributions of the 2008 RAC Report on Motoring Advisory Panel that was chaired by David Bizley, Director of Technical.

The Report was written for RAC by John Gambles and Chris Macgowan, and edited by Rose Spero.

The Report was designed for RAC by Curious and printed by Williams Lea.

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Appendix B

About the research.

Research methodology

This Report is based on a large-scale quantitative internet survey and desk research conducted by Quadrangle on behalf of RAC.

For the internet survey, Quadrangle interviewed 1,116 British motorists (defined as currently having a valid driving license and driving at least once a month). The survey was completed during March and April 2008.

The sample was nationally representative on age, gender, socio-economic groups and region. The number of company car drivers was boosted, and as such weighting factors have been applied to restore the overall sample to be nationally representative of households with company cars. The sample was also weighted for market representation of new versus second-hand car ownership.

Quadrangle also undertook desk research, using all previous available Reports on Motoring from 1989 – 2007*, and data in the public domain published by the Department for Transport and the Office for National Statistics.

*Until 1999, the reports were called 'The Lex Report on Motoring' and from 2000 'RAC Report on Motoring'.

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 are 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 proportions answering so the error is lower for a 90/10 result than for a 50/50 result.

In order to illustrate the use of varying sample sizes and their affect 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.

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%.

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

Appendix C

Cost of motoring analysis.

The special analysis of how the costs of motoring have changed over 20 years was carried out for RAC by Go Motoring Ltd, supported by data from Motor Consulting and Management Ltd.

Changes in the cost of motoring have been calculated using the assumptions and information sources detailed below.

Retail Price Index

Data provided by Office for National Statistics.

Cost of running a car

Comprises service and repair costs, insurance, fuel, road tax and breakdown cover.

Service and repair costs provided by Motor Consulting and Management with additional data from Autodata, Euro Car Parts and Dunlop Goodyear; insurance provided by Norwich Union; fuel prices provided by the Retail Motor Industry Federation with consumption data from Ford, Vauxhall, BMW, Audi and Renault; Road Tax by the DVLA and RAC breakdown cover by the RAC.

Cost of new cars

Figures are based on the cost of depreciation and finance over three years and 12,000 miles per annum, and assume that a 10% deposit is paid.

Depreciation provided by CAP Motor Research and finance rates by the Finance Lease Association.

Cost of fuel

Data provided by the Retail Motor Industry Federation, incorporating the Petrol Retailers Association.

Total cost of motoring

Comprises all costs, including depreciation, finance, service and repair, insurance, fuel, road tax and breakdown cover expressed as an average for seven cars spanning small, lower medium, upper medium, small executive, executive, luxury and people carrier sectors.

Cost of rail travel and bus and coach travel

Data provided by Office for National Statistics.

Cost of running a car as a percentage of household disposable income

Service and repair costs, insurance, fuel, Road Tax and breakdown cover expressed as a percentage of household disposable income as provided by the Office for National Statistics.

Time to purchase a new car based on average household disposable income

Based on a lower medium sector hatchback, comparing a 1988 Ford Escort 1.6GL with a 2008 Ford Focus 1.6LX, taking disposable income as a percentage of three years depreciation and finance, and assuming that the car is part exchanged for another one after three years.

Company overview

RAC

With around seven million members, RAC is one of the UK's most progressive motoring organisations, providing services for both private and business motorists. Whether it's roadside assistance, car insurance or up-to-the-minute traffic and travel information – RAC provides the motorist with peace of mind.

Aviva bought RAC in May 2005. The acquisition brings together RAC's powerful brand and customer base with the expertise and leading position in motor insurance of Norwich Union Insurance (part of Aviva).

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The most aspirational cars
from 2008, as chosen by
motorists for the RAC Report
on Motoring 2008.

RAC

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