

### Executive Summary

Last year's RAC Report on Motoring revealed the experience of motoring to be more painful than gainful.

In the 2006 report, we find that driving remains an agonising experience for many, with more than half (59%) being more frustrated behind the wheel than ever before, and few expecting the situation to improve anytime soon. What the 2006 Report also shows is that motorists are more pragmatic than they are often portrayed, across the wide range of issues that this report focuses upon – from congestion and in-car technology to greener driving and road safety.

#### Congestion

Motorists are prepared to do a deal on road pricing

On congestion, our evidence suggests that motorists accept that there is a problem, realise that something must be done and that simply building more roads cannot be the only solution. Specifically, over two-thirds (68%) believe that much tougher measures are needed to resolve the problems of congestion and 40% are in favour of congestion charging. These figures indicate that the debate may be moving on, even in the minds of many motorists, from 'why is road pricing necessary?' to 'how is road pricing delivered?'. However, the report also indicates that motorists' support will be fragile and greatly dependent upon the deal that the Government offers in return.

Motorists are clear about the conditions of the deal – it will require a trade-off on motoring tax, visibly improved public transport alternatives and better workplace travel options. Our research suggests road pricing will be received more positively if there is an associated reduction in the motoring tax burden, with 67% of motorists being prepared to accept road pricing if it heralds a reduction in road tax or fuel duty. Indeed, 63% would also back road pricing if all the money raised was spent on improving roads. These figures far outweigh the 20% who state that they would still require convincing and illustrates how the Government needs to make a persuasive national case for road pricing in which the financial trade-offs are made clear to motorists.

The acceptability of road pricing will depend upon the provision of reliable and affordable alternatives. The majority of motorists (69%) want to see a visible improvement in public transport provision if they are to accept the concept.

More work needs to be done in the development of workplace travel plans

There is strong support for the Government taking action to encourage employers to do more to reduce congestion by putting better workplace travel options in place – nine out of ten employees would like to see their employers introduce measures such as showers, secure bike parks, season ticket loans, greater use of home working and car share schemes. Given the impact of commuting motorists on congestion levels, there is a need for the Government to work more closely with employers in the development of workplace travel plans, including new fiscal measures to make this more economically viable.

#### Technology

Telematics technology is popular with motorists and could create a more positive reception for road pricing. Recent advances with in-car technology have the potential to offer substantial scope for encouraging take-up of telematics amongst motorists beyond the usual "early-adopters" of new technology. Benefits that are seen by motorists to be desirable include anti-theft vehicle tracking (87%), technology capable of guiding drivers around traffic hold-ups (80%) and an in-car panic button (86% of female drivers, together with 80% of over 55's). The current low penetration of these devices coupled with motorists' apparent aspiration to have them, suggests that these associated benefits could constitute a useful bargaining chip in creating a more positive reception for telematics-enabled road pricing.

The Government should lead the debate to mandate in-car technology for all new vehicles. In-car technology provides a potential enabler for either national or local road pricing schemes but clear standards must be developed to ensure in-car technology is compatible with that used for any road pricing scheme. The Government should lead the debate to mandate in-car technology for all new vehicles and provide incentives to encourage take-up.

#### Greener Motoring

UK motorists recognise the environmental impacts of car use but cost is still key

Our research indicates that UK motorists recognise the environmental impacts of car use with 50% stating that they would check emissions levels before purchasing their next vehicle. However, to really improve the uptake of green motoring, it is essential for Government and manufacturers to better understand the priorities of the UK motorist. Environmental attributes are a consideration when a new car is purchased, but they lag a long way behind price, styling, reliability and safety.

Current measures to encourage greener motoring are not working and will not do so until motorists see greater financial benefits

The steps taken to encourage take-up and inform motorists on more environmentally friendly vehicles – such as the green labelling of new cars in the showroom and changes to the Vehicle Excise Duty – are welcomed. However, they have not led to a culture change in vehicle purchasing and our research suggests that this will not happen until there is a discernible financial benefit in going green (43% of motorists would not take the green initiative without this incentive) or until other motorists go green (43%, again, indicate they will go green after other people do).



The Government needs to review its approach by providing greater incentives and better educational encouragement. If the Government is serious about hitting a tipping point on greener motoring and really changing driver behaviour, then it needs to fully investigate the purchasing decisions of motorists. Options would be to provide improved incentives either on purchasing new cars or perhaps the scrapping of older, more polluting and less fuel-efficient vehicles and to extend the emissions banding and fuel consumption label system from new vehicles to the second-hand car market. Financial incentives also need to be long-term so that manufacturers, businesses and motorists are assured that if they purchase vehicles with environmental and resultant tax benefits, these benefits will not be subject to regular amendment by HM Treasury.

### Road Safety

Motorists believe they are safe and law-abiding despite their willingness to ignore the rules of the road. Road safety is high on both the public and political agenda and the vast majority of British motorists (84%) consider themselves to be safe, law-abiding drivers. It is difficult to reconcile this figure with the admissions of many respondents that they speed (48%), drink-drive occasionally (19%) and more generally ignore the rules of the road when they can get away with it (28%). Interestingly, our research indicates that motorists acknowledge that a harsh clampdown is necessary on some of the very same motoring misdemeanours to which they confess and there is a high level of tolerance amongst drivers for treatments that might be expected to cause adverse reaction.

### There is strong support for greater punitive action on drink and drug driving

The two biggest road safety concerns for motorists were drink driving and drug driving with 89% and 55% identifying these issues as a top three road safety concern respectively, requiring greater punitive action.

There was strong support for compulsory dashboard alcolocks (81%) and for robust tests for drug drivers, with 89% backing roadside testing by police equipped with breathalyser style electronic devices.

RAC calls on the Government to consider the introduction of alcolocks as used in Sweden and more robust roadside drug tests. With drink and drug driving high on the list of motorists' concerns, more must be done to rehabilitate offenders, for example driver improvement programmes.

There is strong support for non-punitive speed checks and also for punitive technology-led enforcement in residential areas suggesting that urgent Government action is needed to build public confidence in the current speed enforcement regime. On speeding there was widespread backing for non-punitive checks (70%) and 66% saw vehicle-activated speed warning signs as an effective tool. The interesting point here is that whilst punitive speed cameras are viewed by 69% of drivers as more of a tax on motorists than a road safety tool, in-car speed limiters were backed by 49%.

This suggests that the UK's motorists treat speeding as a serious road safety issue but that the current enforcement regime is discredited in their eyes. Given the Government's apparent wish to continue with its punitive speed camera regime, it needs to take steps to emphasise the road safety rationale for its approach. One way in which this may be accomplished is by altering the current fines system, so that instead of just receiving a notification in the post, offending motorists also receive information on the casualty/accident figures for the road on which the offence is committed and advice on how to improve their driving.

### Cutting a deal?

This year's RAC Report on Motoring suggests that the Government doesn't have to be on a collision course with motorists. Both parties accept that there are significant problems with congestion, road safety and the impact of motoring on the environment – problems that require nothing less than radical solutions. There is light at the end of the tunnel for policymakers as motorists have revealed that they are not only prepared to cut a deal with Government, but that they are also clear on what the terms of that deal should be.

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