

Breakdown Britain Report



RAC

Foreword

Welcome to Breakdown Britain 2008, the UK's most authoritative report providing a first hand view from the road as seen by RAC's 2,000 Patrols who are a constant presence on the nation's roads.

In 2006 we surveyed our Patrols to find out where, how, and why breakdowns were happening in the UK. More generally, we wanted to paint a picture of Britain's roads and to uncover the issues facing motorists.

The resulting report, Breakdown Britain, used this unique body of research to offer an insight into the driving experiences of British motorists.

Two years on, we have returned to Breakdown Britain, to see how motoring in the UK has changed, set against a backdrop of rising oil prices, a growing credit crunch impacting consumer spending and the increasing complexity of car technology. As the eyes and ears of the road in the UK today, our Patrols are in a unique position to comment on a host of issues affecting the motorist.

Several strong themes emerged from the research, all of which are covered within this report:

- The state of the roads is of fundamental concern to our Patrols and members (Section 1)
- Motorists are still scared to look under the bonnet and driver vehicle knowledge has not kept pace with technological advances (Section 2)
- Different family members react to a breakdown and the arrival of the Patrol in different ways (Section 3)
- The credit crunch and rising oil prices are profoundly affecting motorists (Section 4)
- The role of the roadside Patrol has evolved beyond fixing cars (Section 5)
- Where, when and why breakdowns take place in the UK (Section 6)

This report allows our Patrols to express their opinions and concerns, and showcase their expertise. I hope that you enjoy reading the Breakdown Britain 2008 report, and that you find the insights into motoring issues experienced today both interesting and informative.



Neil Thompson
Director of RAC Rescue

Methodology

- In depth survey of 626 RAC Patrols between 18th March and 18th April 2008
- Analysis of results by The Survey Shop between 23rd April and 1st May 2008



Section 1

The quality of the roads in 2008

Every day, all around the country, RAC's Patrols are driving up motorways and down country lanes, fixing vehicles and talking to members about their thoughts and concerns. As such, the Patrols are in a unique position to comment on the quality of Britain's roads. It is also a topic of real importance to them: poor roads causes anxiety amongst motorists and can damage tyres leading to unnecessary call outs.

When asked whether the state of the roads had declined during their time as a Patrol, the overwhelming response was yes – in fact, more than three quarters of Patrols felt that the quality of roads has deteriorated. This is despite the fact that four out of five Patrols believe the volume of roadworks in their area has increased, suggesting that road improvement programmes are failing to deliver the expected benefits.

More than half of Patrols believe that the poor quality of the roads is having a detrimental effect on the experience of driving in the UK today making driving much less enjoyable.

In addition to the daily frustration of driving on poor quality roads, many also have to contend with frequent punctures caused by our poor quality highways. In fact, a simple puncture was the single number one cause of breakdowns for RAC members in 2007, with over 200,000 call outs recorded. Over three quarters of Patrols have seen an upturn in damaged tyres during their time as a Patrol.

The proportion of Patrols who believe a decline in the nation's roads has led to an upturn in the following breakdown problems:

- Damaged tyres i.e. punctures etc



- Damaged wheels



- Damaged suspension



- Chipped windscreens



- Damaged underbody



The quality of the roads in 2008

It will come as no surprise to hear then, that of the £44bn collected in motoring taxes last year just £7bn was spent on improving Britain's roads¹.

RAC strongly believes that this situation needs to change. It is clearly unacceptable for motorists to have to endure such a high tax burden on the one hand, and such poor quality roads on the other. That is, while welcoming the £6bn planned Government expenditure on relieving congestion, we are also calling for the Government to match this level of investment to improve the standard of UK's roads - providing Britain's motorists with the service they both deserve and continue to pay for.



Summary

80% of Patrols think that the volume of roadworks in their area has increased

77% of Patrols think that the quality of roads has deteriorated

76% of Patrols have seen an upturn in damaged tyres
Punctures were the number one cause of breakdowns for RAC members in 2007, with over 200,000 call outs

59% of Patrols feel that drivers were more anxious as result of a decline in the nation's roads



Section 2

Motorphobia two years on

In 2006 Breakdown Britain uncovered a new phenomenon among UK drivers called motorphobia, indicated by a sharp upturn in basic maintenance call outs. Our Patrols found that increasingly complex technology, lack of time and reluctance to tackle the problem ourselves have contributed to a generation of motorists who are less savvy with the workings of their cars than previous generations.

So, how has motorphobia moved on in the last two years? The overwhelming message from Patrols is that vehicle technology is preventing motorists from even lifting the bonnet.

In fact, nearly two thirds of Patrols regularly attend breakdowns and find that the member is unable to diagnose the problem, often because it is simply too difficult to understand modern cars. With car technology now so advanced, Patrols are equipped with laptops and other high-tech equipment to aid diagnosis when coming to the rescue of motorists.

However, motorists also seem to be shunning even basic maintenance skills, with feedback given to Patrols by motorists including:

- I just don't have the time **66%**
- I'm afraid to look under the bonnet **62%**
- I didn't notice it had broken **60%**
- Lack of understanding basic car maintenance skills **58%**

Interestingly, Patrols stated that many of the call outs they attend to are due to simple 'motorist mishaps'. Nearly all have been called to a car where the driver has locked themselves out and have also arrived at a vehicle which simply ran out of fuel.



Motorphobia two years on

Comprehending the car manual

Manufacturer handbooks can be lengthy and difficult to understand, discouraging motorists from trying to diagnose the problem themselves leading them to call their breakdown service. However, three quarters of Patrols think three out of ten call outs could be avoided if motorists were able to follow their handbook. Car manufacturers could do more to help here, by creating handbooks with a quick reference guide that are easier to understand by all motorists.

Complex technology

Driver knowledge has not kept pace with modern technology leading to numerous call outs based on minor car issues. For example, two thirds of Patrols think a significant number of call outs are caused by motorists mis-interpreting warning lights and assuming the vehicle isn't safe to drive.

Remote locking has also been a mixed blessing, leading to nearly 65,000 call outs last year from motorists who have accidentally locked themselves out of their car. In fact, over half of Patrols have seen an upturn in lock-outs and nearly all have responded to this kind of call out. Half of Patrols have been called to fix a car stereo, while four out of ten have been asked to top up windscreen washer fluid and 94% have been called out to members who had vehicles without a spare tyre, and with so

many modern cars now not having a spare tyre 94% have been called out to members complaining of this.

RAC Patrols have also reported on a rise in misfuelling. RAC received nearly 50,000 call outs for misfuelling in 2007. This simple error is costing motorists millions of pounds a year to put right over and above the additional pounds they are paying for fuel with prices at an all time high.

“I’ve been a Patrol for over 23 years now and have seen an increase in the number of call outs as a result of new technology. It would also help motorists to familiarise themselves with their vehicle if manufacturers provided a “quick reference guide”, in addition to the handbook, to assist with many of the problems that occur.”

Prakesh Patel, RAC Patrol



Motorphobia two years on

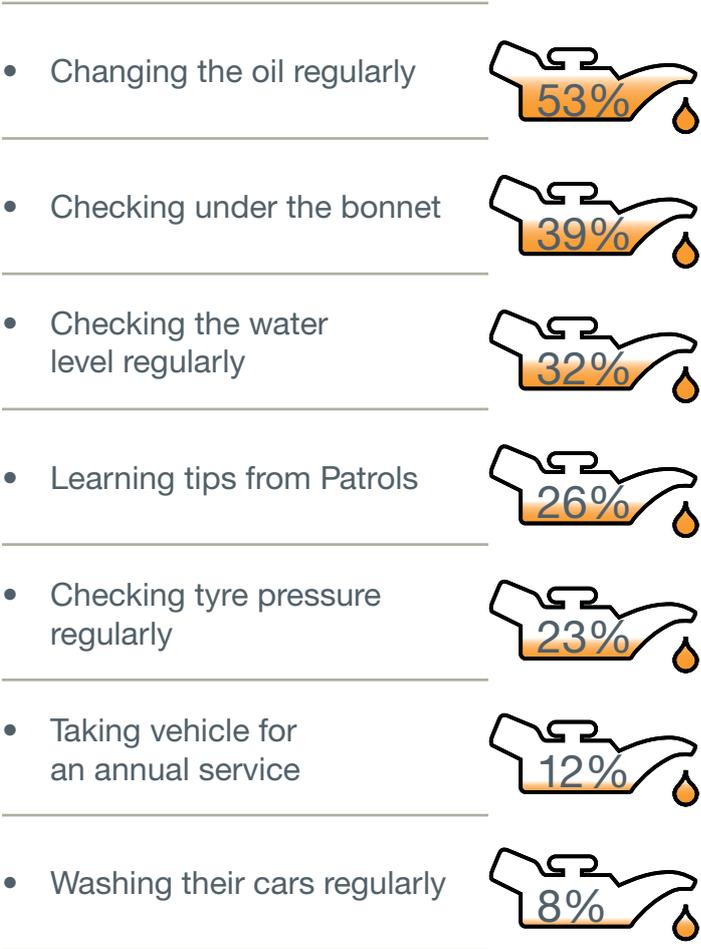
Maintenance

All of the above factors, as well as a lack of time in today's busy society, means that motorists are struggling to maintain their cars properly. Patrols have reported that motorists are now less likely to carry out basic checks and precautions such as changing the oil and checking water levels or tyre pressure.

“ Understanding your vehicle, even on a relatively basic level could save people time and money as well as ensuring that they are driving safely. By regularly checking the oil, water and tyre pressure when filling up at the petrol station, motorists may reduce the risk of having to make a call-out. ”

Iain Vale, RAC Patrol of the year

Do you think motorists are less able to do the following than in the past?



To avoid the hassle, as well as the time, of being without a roadworthy car drivers can help themselves by carrying out basic checks and by reading their manuals. If a motorist is unsure RAC is also happy to give advice by phone so that drivers don't have to sit and wait for a Patrol.

Motorphobia two years on

RAC recommends carrying out the following basic checks to keep your car running smoothly. However, for more complex work, or if you're ever in doubt, always call the professionals at RAC who will be able to solve your motoring dilemma.

- Check your vehicle is regularly serviced
- Examine the operation of all exterior lights to ensure they comply with the Highway Code
- Check front and rear wiper blades for wear or splitting
- Do check windscreen washers making sure that they are adjusted correctly
- Check oil and water levels
- Check the security of the mounting frame for your battery and the battery terminals are free from corrosion and tight
- Inspect the jack and wheel brace making sure you are confident about how to use them
- The condition of your tyres (including the spare) should be checked for pressure and tread depth
- Inspect car keys for wear and replace if necessary. A worn key will quickly wear out a lock barrel and cause the lock to jam

Summary

75% of Patrols think three out of ten call outs could be avoided if motorists understood their handbook

69% of Patrols think a significant number of call outs are caused by motorists mis-interpreting warning lights and assuming the vehicle isn't safe to drive

62% of Patrols regularly attend breakdowns where the member is unsure of the problem

53% of Patrols have seen an upturn in lock-outs

49% of Patrols have seen an upturn in damaged tyres. Punctures were the number one cause of breakdowns for RAC members in 2007, with over 200,000 call outs

44% of Patrols have been asked to top up windscreen washers



Section 3

The family and the car

The car has long been an enabler for family life, playing a key role in people's lives. The car is also one of the few places where today's time-poor families can be together, whether it's on a day trip to the beach or just dropping the kids off at a friend's house.

We may travel together but our Patrols tell us that each family member reacts differently to a breakdown.

Many Patrols commented on how eager children are to meet them – in fact, 91% have arrived at a call out to find a family with kids who are excited to see them. Four out of ten Patrols said that gadget-mad Dads are most likely to try and get involved with their work, while a quarter think Mums are more likely to be calm in the event of a breakdown.

Patrols also commented on cheeky family members trying to pass the buck for problems with the car. Over half of Patrols have spoken to a member who has claimed that the reason for the breakdown is their partner not looking after the car and almost as many have blamed their kids messing around for faults in their vehicles.

Finally, a strong theme which emerged from the research is that the British capacity to make the best of a bad situation is alive and well. Many Patrols have arrived at a call out to find motorists make the most of the enforced stop to enjoy themselves, for example by sunbathing or having a picnic – or even being passionate with their partner!

Have you ever attended a breakdown and been greeted by one of the following situations?

- A family with kids who are fighting
61%



- A couple having a heated argument
58%



- A family who has taken advantage of the breakdown, e.g. to sunbathe or have a picnic
52%



- A couple being passionate
31%



Summary

91% of Patrols have arrived at a call out to find a family with kids who are excited to see them

56% of Patrols have spoken to a member who has claimed that their partner didn't look after the car

48% of Patrols have been told by a member that the breakdown is the fault of their kids messing around

40% of Patrols said that Dads are most likely to try and get involved with their work

36% of Patrols think middle aged people are the most knowledgeable about their car



Section 4

Motorists are feeling the financial pinch

It's been a difficult couple of years for motorists since Breakdown Britain 2006, with rising petrol prices and the onset of the 'credit crunch' forcing many to tighten their belts.

How does this affect the motorist? Our Patrols told us that drivers are deeply concerned about the economy. Over half of Patrols said that RAC members complain about fuel costs more than any other issue, hardly surprising when the average cost of filling up a tank is around £70.

The huge financial burden being placed on motorists is actually affecting their ability to maintain their vehicles. More than one in ten Patrols have found that members are less able to take their cars for a service and one in ten Patrols have been told by members that they can't afford basic repairs to their cars.

RAC believes that the Government needs to do more to protect Britain's drivers through the current oil price volatility and ease the pain at the pumps. With October's planned increase rightly discarded the Government must now look at reducing fuel duty and at a set of new measures that see fuel duty used as a price stabiliser, with future price rises being offset by a reduced level of fuel duty paid at the pumps.



“ Day in, day out, our members are telling us that they are feeling the pain at the pumps, even despite the recent fuel price cuts. We strongly believe that motoring has become the third 'sin tax', although it is a necessary mode of transport for millions of people across the UK. RAC is calling on the Government to immediately cut fuel duty and to implement new measures, such as using fuel duty as a price stabiliser, to help motorists survive in this worsening economic climate. ”

Adrian Tink, RAC Motoring Strategist

Summary

57% of Patrols say members complain about fuel costs the most

12% of Patrols say customers are less able to take their vehicle for an annual service

10% 10% of Patrols say motorists have told them they struggle to afford paying for repairs due to prohibitive cost



Section 5

Going the extra mile: The role of a patrol

The role of a Patrol is far more than that of a mechanic. They listen to members' problems, often go above and beyond by dropping members to important occasions, and have even, on occasion, had to deliver a baby!

More than two thirds of Patrols have come to the aid of the emergency services, getting ambulances and police cars back on their way, while four out of ten have delivered a member to an important occasion such as a wedding or the airport for a dream holiday.

Almost three quarters of Patrols have attended a call out which has involved pets or animals, whether they are greeted by a member's dog overzealously guarding their car keys met by a family of squirrels nesting in the engine and even an alligator being transported to the Zoo.



Have you ever encountered any of the following unusual situations in your job?



Going the extra mile: The role of a patrol

AND FINALLY...

Out on the roads every day, Patrols meet an astonishingly wide range of people, many of whom are eager to chat about wider issues affecting them and the UK. This makes our Patrols uniquely well-placed to comment on trends in small-talk topics.

The chart below shows the issues currently being discussed on roads the length and breadth of Britain. While common British small-talk about the weather and holiday plans still feature heavily, it is interesting to see that weightier issues such as the economy, global warming and house prices are moving up the agenda. It's no surprise that sport is also a hot topic, with football, rugby and the London 2012 Olympics all of interest to RAC members.

The top 5 topics of small-talk are:

- Their destination that day - 87%
- The weather - 85%
- House prices - 47%
- Economy - 46%
- Holiday plans - 60%

What small-talk topics do you regularly discuss with members?

-
- | Topic | Percentage |
|----------------------------|------------|
| Their destination that day | 87% |
| The weather | 85% |
| House prices | 47% |
| Economy | 46% |
| Holiday plans | 60% |
| Football | 52% |
| Work problems | 34% |
| Young people | 27% |
| Global warming | 25% |
| Rugby | 25% |
| Disagreement with partner | 15% |
| Cricket | 14% |
- Their destination that day - 87%
 - The weather - 85%
 - House prices - 47%
 - Economy - 46%
 - Holiday plans - 60%
 - Football - 52%
 - Work problems - 34%
 - Young people - 27%
 - Global warming - 25%
 - Rugby - 25%
 - Disagreement with partner - 15%
 - Cricket - 14%

Summary

71% of Patrols have attended a call out involving pets or animals

69% of Patrols have attended a call out for one of the emergency services

39% of Patrols have had to deliver a member to an important event, i.e. wedding

2% of Patrols have delivered a baby



Section 6

Breakdowns in the UK today

In the past year, RAC attended over 2.8 million breakdowns, the equivalent of over 300 an hour. Using detailed information captured for every single call out, we have been able to build a detailed picture of breakdowns in the UK today, showing where, when and why they happen.

Where?

The data pinpointed not only the most likely regions in the country to break down, but even the name of the road itself. So be extra careful if you frequently drive on a High Street in the South East!

Road name	Number of breakdowns in past year
High St	18,198
Station Rd	10,204
London Rd	10,002

Regional Breakdown Hotspots (from most to least likely)

- 1 South East
- 2 Greater London
- 3 North West
- 4 East Midlands
- 5 South West
- 6 West Midlands
- 7 North East
- 8 Scotland
- 9 Wales
- 10 North Ireland



Breakdowns in the UK today

When?

Breakdowns are most likely to happen between 9am and 10am on Monday mornings, when motorists step into their cars to head for work after the weekend.

In terms of time of year, the most common month for breakdowns to take place is December, when the cold weather causes more flat batteries, the second most widespread cause of breakdown.

Why?

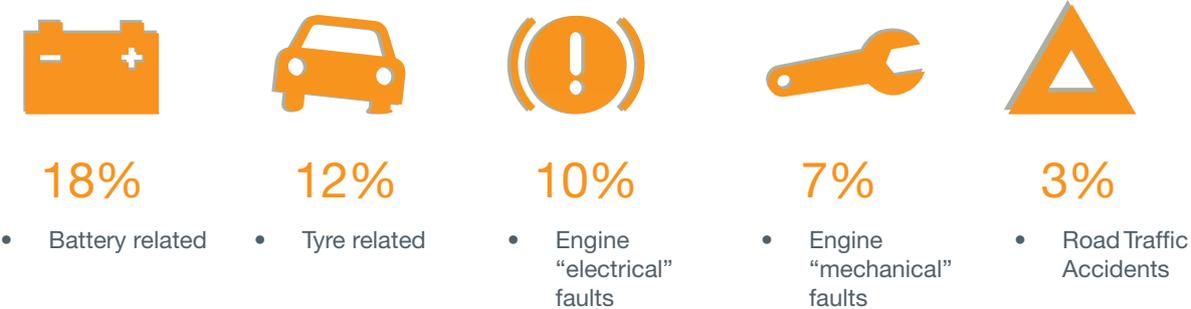
The single top cause of breakdown in 2007 was the simple puncture, followed by a flat battery.

Did you know?

The most likely colour of car to break down is blue, followed by silver and red.

Colour	Number of breakdowns
 Blue	603,725
 Silver	529,470
 Red	347,957
 Black	311,229
 White	302,342
 Green	245,984
 Grey	180,164
 Gold	26,035
 Yellow	23,027
 Purple	18,545

Top 5 breakdowns by category





Conclusion

The Breakdown Britain report provides a snapshot of motoring in the UK based on the views and experiences of RAC Patrols. Out on the roads every day, Patrols are uniquely well-placed to comment on the issues affecting motorists.

One of the biggest problems appears to be the quality of Britain's roads. The vast majority of Patrols are in agreement that these have deteriorated, causing unnecessary breakdowns and great concern for motorists.

Motorists are also having to contend with an almost daily increase in fuel costs as a result of oil price volatility.

This report makes it clear that urgent action needs to be taken. As such, RAC is calling on the Government to:

- Bring the amount spent on Britain's transport infrastructure in line with the revenue collected in motoring taxation
- Take a look at the burden placed on motorists, reduce fuel duty and introduce new measures to tackle the pain at the pumps

RAC's news releases and a selection of images are available from the internet press centre at www.racnews.co.uk.



About RAC

With around seven million members, RAC is one of the UK's most progressive motoring organizations, providing services for both private and business motorists. Whether it's roadside assistance, windscreen repair and replacement, learning to drive, vehicle inspections and checks, legal and financial services or up-to-the-minute traffic and travel information - RAC is able to meet motorists' needs. RAC incorporates BSM, RAC Auto Windscreens, RAC Direct Insurance and HPI.

RAC is committed to providing the very highest levels of service to its members and has been ranked first for customer service by J.D. Power and Associates' UK Roadside Assistance Study for the past two years.

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). Norwich Union is the UK's largest insurer, insuring one in seven motor vehicles and with a market share of around 15 per cent.