



RAC Report on Motoring 2006
The Future of Motoring: A clear road map or collision course?

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With around seven million members, RAC is one of the UK's most progressive motoring organisations and a provider for both private and business motorists. Whether it is roadside assistance, windscreen repair / replacement, learning to drive, vehicle inspections, financial services or up-to-the-minute traffic and travel information – RAC is able to meet motorists' needs.

In 2005 Aviva acquired RAC. The acquisition brought together RAC's powerful brand and customer base with the expertise and leading position in motor insurance of Norwich Union Insurance (part of Aviva plc). Norwich Union is the UK's largest insurer, insuring one in seven motor vehicles and with a market share of around 14 per cent.

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The Future of Motoring: A clear road map or collision course?

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Strong economic growth over the past decade has made Britain more affluent and, as a result, demand for travel has risen steeply. Last year that meant we took more than a billion rail journeys, half the population flew at least once, and our passion for the motor car continued to grow.

Since this Government came to office in 1997, we've seen year after year of record or near-record car sales. A decade ago, there were 26 million registered vehicles on our roads. Last year there were nearly 33 million.

But the growth in vehicle use is leading to mounting congestion in many parts of the country.

Of course we continue to invest in the road network. Thirty-five major road schemes have been completed since 2001, adding much needed capacity on some of our busiest roads.

We've made substantial improvements to the management of traffic across the country – with more than a thousand new Highways Agency Traffic Officers employed to maximise the flow of vehicles, particularly after accidents. Supporting them are a National Traffic Control Centre and 7 regional control centres, which relay real time information to motorists via variable messaging systems, through the media and on the internet.

Active Traffic Management, a new approach to congestion management, is being piloted on the M42 near Birmingham. This includes variable speed limits, access control, and the use of the hard shoulder as a running lane during peak periods from spring 2007.

And we're continuing to put record resources into public transport. Local transport investment more than doubled between 1997 and 2003, while last year we spent £87 million a week on the railways.

But together these measures will only tackle congestion for so long. Simply building more roads is not an answer, practically or environmentally.

Equally, doing nothing about traffic build-up is not an option.

We associate cars with freedom and choice, but if we fail to tackle congestion, there'll soon come a time when that freedom and choice no longer exists. So, a more radical approach is needed if we are to get the best out of our road network.

The success of congestion charging in London and Durham has paved the way for pilot schemes in selected areas around the country to be launched in around five years.

We have to make sure they're acceptable to the public – acceptable in terms of cost, privacy and the benefits they bring.

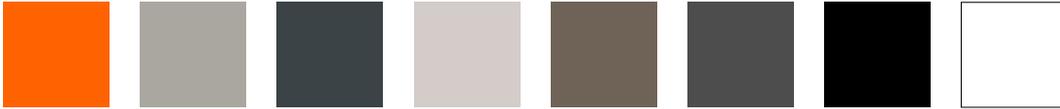
The challenge now is to widen the debate, making sure motorists and motoring groups are at the heart of the discussion. Despite the best efforts of some ill-informed critics, this is not about taking sides, and deciding whether you're pro-car or anti-car.

We all recognise the crucial role played by the car in Britain today – and the car will continue to play a crucial role. But equally, no motorist can afford to ignore the consequences of unchecked growth in road use.

We all have to take responsibility for our actions. Then – and only then – can we really start to move forward.



Dr Stephen Ladyman MP
Minister of State for Transport



Welcome to the 2006 edition of the RAC Report on Motoring, our annual in-depth research into the views of UK motorists. In its eighteenth year, the report surveys and analyses the state of motoring today and provides a clear picture of how motorists view the numerous challenges and possible solutions on the 'rocky' road ahead.

The biggest of these challenges is undoubtedly congestion – an irritation and concern for many drivers and a problem that has a major impact for the UK's economic competitiveness and environmental performance.

Investment in road improvements and better network management is crucial and the contribution that an organisation such as RAC makes to road safety and congestion management is considerable. However, these measures alone will not solve the problem and in an effort to bring more radical improvements, the UK Government has taken the unprecedented step of announcing plans to move towards a national system of road pricing.

The Government has stated its keen desire to gain consensus on the road pricing debate both politically and with the public. Our Report on Motoring is a major piece of research to inform the debate from the motorists' perspective and to start the process of consensus building. You may expect that even the mention of such an idea would arouse fierce hostility amongst the UK's motorists. However, our report shows that the modern motorist recognises the scale of the problem and the need for radical action, provided that there is 'give' as well as 'take'.

Moreover, congestion isn't the only challenge on which British motorists are willing to 'do a deal'. Over the next 42 pages we will show how motorists are prepared to enter into negotiation with policymakers on congestion, road safety reform and greener driving. It is some shift from the position we have seen in previous years, where there was little room for negotiation.

As the authoritative report on motoring, it undoubtedly informs how policymakers formulate solutions to the motoring challenges ahead. We hope that you find the report of interest and that you continue to value RAC's role of representing the voice of the motorist on these important issues.

Handwritten signature of Debbie Hewitt in orange ink.

Debbie Hewitt
Managing Director, RAC

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

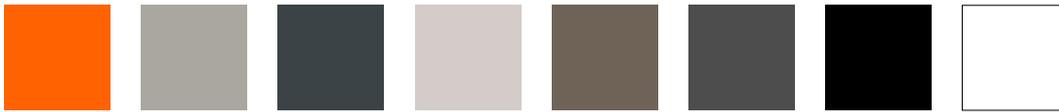
Motorists are prepared to do a deal on road pricing

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 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.

Chapter 1

Introduction



RAC's Report on Motoring 2005 – The agony and the ecstasy of driving, revealed the experience of motoring to be more painful than gainful.

The vast majority (90%) of motorists stated they'd find it difficult to adjust their lifestyles without a car and admitted to using it everyday. Congestion, accidents, fines and numerous other anxieties were revealed as taking their toll. Particular frustrations affecting motorists included speed bumps, speed cameras and other drivers' dangerous habits, including mobile phone use at the wheel, tailgating and overtaking in the wrong lane.

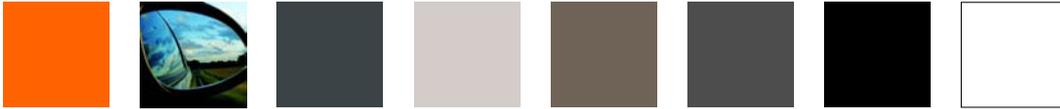
Eighteen months on, how has the picture changed? In the chapters that follow, motorists reveal that the agony has worsened and the little ecstasy that existed is fast disappearing. Driving remains an agonising experience for many and few expect the situation to improve anytime soon.

More than half (59%) are more frustrated behind the wheel than ever before, and over two-thirds (68%) believe that much tougher steps are necessary to resolve the problems of congestion. In the last year however, the Government has given motorists some reason to feel optimistic about the future with bold and radical policy announcements. A piecemeal approach that has included congestion charging schemes, high occupancy vehicle lanes and motorway toll roads has been rationalised and a clearer road map set out.

In a speech to the Social Market Foundation in June 2005, Alistair Darling stated that 'looking

ahead road pricing has an essential part to play'. A radical scheme to charge motorists for road use has grown from the germ of an idea to become the Government's 'big solution'. The Government's aim is to have local pilots up and running within 4 – 5 years and they are currently exploring the potential for a national road pricing scheme. In light of this, the report identifies important questions that need to be asked of any such scheme. What are the key conditions needed to win drivers' seal of approval? What is the most acceptable basis for charging? What other motoring costs would need to be reduced to make such a scheme palatable to road users?

Some of the lessons that can be learnt from existing measures such as speed cameras will also be examined. Previous RAC reports have revealed motorists' widespread mistrust of the devices with over two thirds believing they are designed to raise revenue not improve road safety. Given that 55%



of motorists admitted to speeding regularly in last year's report despite growing numbers of speed cameras, are there lessons to be learnt that can be applied to road pricing? How can policy makers win hearts and minds to deliver on the promise of such a scheme?

Telematics is the big technological innovation on the horizon, the basis for any road pricing scheme and a device with the potential to transform motorists' lives. The 2006 Report presents new insights into public attitudes towards telematics and policy makers will find crucial information that will enable them to manage the presentation of the technology to ensure its successful take-up. The crucial importance of cost as a tipping point and the potential benefits of telematics that appeal most to motorists – vehicle trackers, route finders, satellite navigation (SatNav) – are covered. Doing so helps construct the strongest argument possible for the technology's existence.

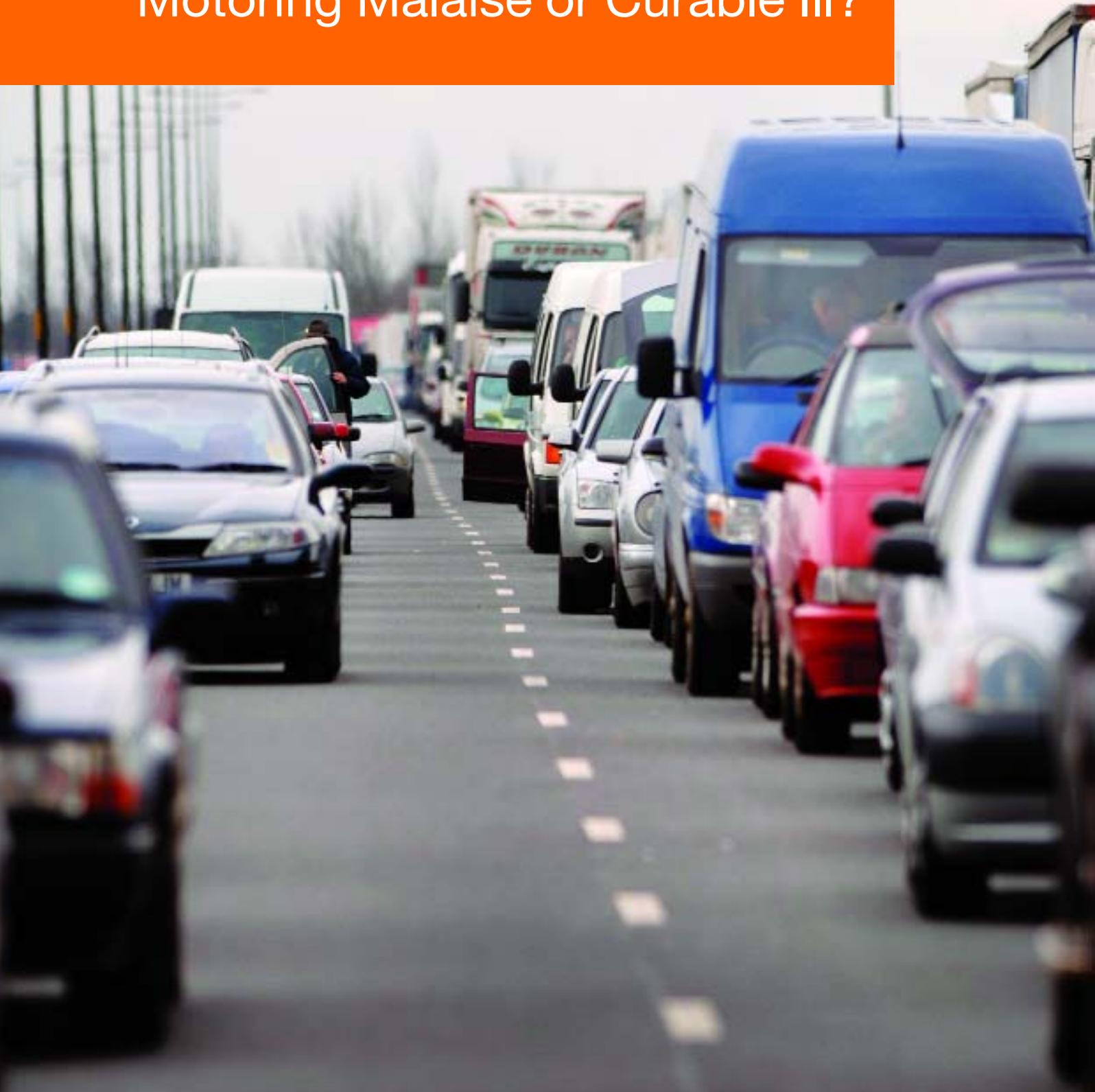
What of the other policies that have been introduced, or are currently on the agenda? Motorists have strong views on them all as the chapters to follow demonstrate and there are hurdles that must be overcome to secure greater buy-in. Why has congestion charging proved not to be an all-out success despite a 30% reduction in congestion and easier journeys around the capital for 1 in 5 respondents? What are motorists' perceptions of the scheme, the differences between those for and against and where are the opportunities to win round the critics?

The environment is rising up the political agenda. Chapter 4 asks how realistic it is to adopt environmentally friendly motoring practices. There are additional insights into motorists' attitudes and how prepared they are to change their behaviour – whether they are green at heart or environmental sceptics. Just what will it take to bring them round?

The issue of road safety was one of the main themes in last year's Report on Motoring. In the wake of the Road Safety Bill, Chapter 5 revisits some of the main issues affecting motorists, namely drink and drug driving. Just how much of a problem are they? How concerned are motorists and what do they think the Government urgently needs to address to make driving safer for all?

As in previous years, the 2006 RAC Report on Motoring *The Future of Motoring: A clear road map or collision course?*, provides an authoritative framework for debate on the pressing issues and challenges of managing Britain's roads and points to some possible solutions for Government and law enforcers.

Chapter 2 Congestion: Terminal Motoring Malaise or Curable Ill?





Gridlock grind: Stop-go signs around the corner.

It may come as no surprise that the majority of motorists (59%) feel a growing sense of frustration at traffic jams or that 79% perceive congestion to be getting steadily worse. Long gone are the days when life on the open road was a pleasurable freedom. Instead, Britain's motorists face a daily battle through a minefield of hold-ups, roadworks and parking restrictions that take the gloss off what should be an enjoyable experience.

Indeed, 56% say that all the fun has gone out of driving and 51% feel it is almost impossible to drive anywhere these days without incurring a fine.

Despite this, motorists display an enduring love for their cars and a lack of enthusiasm for the alternatives of public transport, car sharing, cycling or walking.

The Government, for its part, has indicated that an endless expansion of its road building programme is not a sustainable solution. Instead, it has proposed a series of controversial initiatives including congestion charging, road pricing, motorway tolls and high occupancy lanes to cut queues.

The situation is such that as the research reveals, two-thirds (68%) of motorists are prepared to accept what they, themselves, regard as draconian measures to tackle congestion.

That is not to say, however, that British motorists are agreed on the best ways to ease the flow of traffic.

Opinion is perhaps most deeply divided on the controversial option of congestion charging. This has the support in principle of 40% compared to 44% who object.

Motorists are much less positive about continental-style motorway tolls however, regarded as inequitable by 57% compared to 35% who believe them to be a useful tool.

Commuters may profess to want better public transport if they are to be persuaded to leave their cars at home but 79% of respondents believe buses and trains to be an ineffective alternative in the battle to beat congestion. They have, perhaps, seen all too many grand new schemes stall like the Crossrail link across London and they remain sceptical. The rising cost of public transport is another issue. Whilst UK motoring costs remained constant in real terms between 1974 – 1998, public transport costs experienced substantial increases of 60 – 80% during the same period.¹

It is, therefore, likely to require a comprehensive strategy to relieve the logjam at bottlenecks and to convince drivers that the alternative to their car is expedient, efficient and economically viable.

Congestion Causes: Automotive Addictions

One look down almost any residential road at the lines of parked vehicles should be enough to remind us that today's generation is more hooked on cars than their parents – so much so that 87% say it would be very difficult to adjust to life without one. Indeed, more than a quarter of households now have two or more cars – a higher proportion than those that have none.

¹ TRANSform Scotland and Friends of the Earth Scotland. Briefing on Transport (Scotland) Bill. 2000

Times are also changing in the way we use the car. The lone driver struggling through the rush hour is a much more common sight and commuting by car is by far the biggest reason for daily journeys. In fact, 60% of cars on the road have only one occupant² and the average number of occupants per car has fallen from 1.62 in 1989/91 to 1.59 in 2004.

Hardly surprising, then, that policymakers appear agreed that a preference for driving to work is at the heart of the problem. 39% of motorists say they drive most days and a further 9% make daily work-related road journeys.

Whilst occupancy seems to be falling, the time motorists spend in their cars is on the rise. As creeping congestion grows and queues become a more regular feature of the driving experience, nearly a third (31%) of motorists stated that their journey times had increased in the last 12 months.

The Government can, perhaps, justifiably argue that it has already had some success in discouraging driving. Statistics contained in the 2004 RAC Report on Motoring show that 43% drove to work most days two years ago – 4% more than now.

Commuter Concerns

More than half (57%) of car commuters spend just 20 minutes or less at the wheel on the daily trudge to work and 28% drive for a maximum of only ten minutes.

Of particular concern, perhaps, is the hard core of car commuters (19%) who drive less than five

miles to work and the 9% that travel up to just two miles. After all, one would expect the environmentally beneficial and healthy alternatives such as cycling and walking to be most achievable over such short distances.

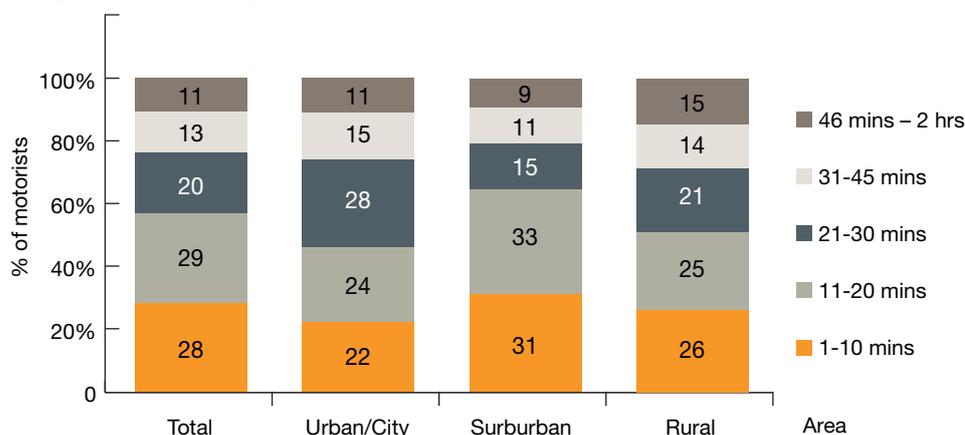
Even a significant minority of urban and inner city dwellers shun the alternatives despite the majority (55%) working in a town or city centre where there is a greater chance of another mode of transport with more than one in six (16%) commuting less than five miles by car.

Motorists in the suburbs also contribute significantly to the ‘short hop’ car commute – almost a quarter (24%) over distances up to four miles.

Where people live also has a major impact on the roads. With new build housing currently high on the Government’s agenda, an emphasis on building new homes puts even more pressure on the road network. Plans for new builds in London and the South East mean that we could see 200,000 new homes by 2016. Of the 120,000 new homes to be delivered in the Thames Gateway, more than half will be built by 2010.

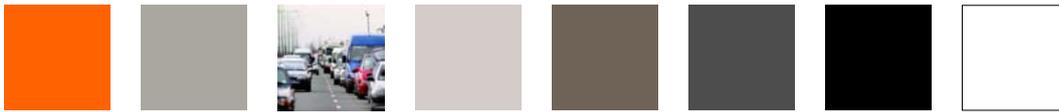
Government planning policies put strain on the roads in other ways too. By encouraging retail stores to be built in the town centre rather than on the bypass, city centres become easily clogged. This problem is further compounded by an urban renaissance taking place in some areas. In 1991, just 1,000 people lived in the centre of Manchester. Massive redevelopment has increased this figure to 15,000.³

Figure 1 Duration of commute



² Department for Transport. Transport Trends: 2005 Edition. January 2006

³ Office of the Deputy Prime Minister. Sustainable Communities: Homes for All. A Five Year Plan from the Office of the Deputy Prime Minister. January 2005



School Run Rumpus

Anyone who regularly drives into a town or city will have first hand experience of the impact that school run traffic has on the length of their journey. Research from the Commission for Integrated Transport suggests that during the past 20 years the numbers of children travelling to school by car has doubled to 41%.⁴ In this year's Report, 15% of our respondents admitted to taking their children to lessons most days and a further 10% drive them there at least once a week. These statistics make it clear that on any given day, the motorist could face streets clogged by mums and dads ferrying kids to school. With policymakers targeting gas-guzzlers in a bid to cut congestion, those parents who drive 4x4s or vast people carriers are likely to be hit. Welcome news to a number of respondents with 27% of our survey wanting a ban on taking children to school by car in urban areas.

Some schools are tackling the issue head-on by persuading parents not to drive and educating children on pollution and road safety, walk-to-school days and activities like poster-designing competitions. A number of local education authorities in Northern Ireland have even begun staggering the beginning of lessons at neighbouring schools to ease the impact of pupils arriving and departing. RAC supports such measures with its own 'Grass Routes' campaign encouraging school children across the UK to devise safe and environmentally friendly journeys to school.

However, many parents feel they still have little choice but to join the school run and this is especially true in rural areas where alternatives are few and far between. The reasons for using the car range from convenience to necessity and the three responses below elicited during focus group discussions were typical of the reactions:

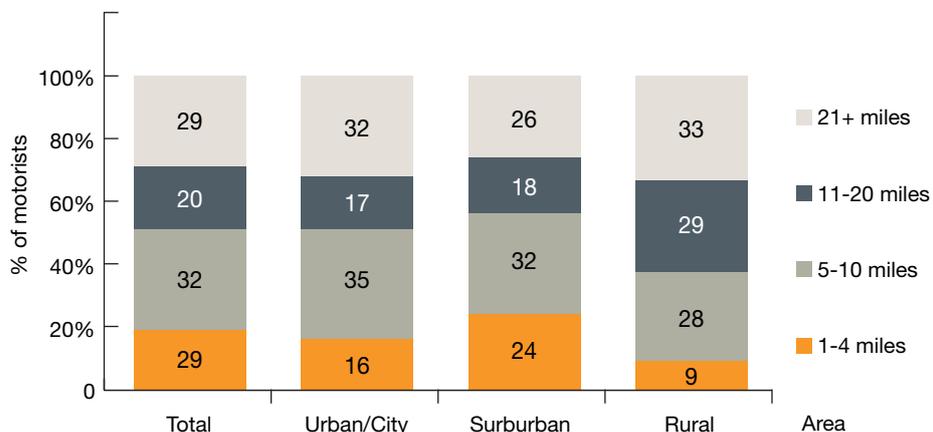
"There is no form of transport that will get the first kid to school, the second to the child minder and then me to work."

"Half of it is laziness – my mum didn't have a car until I was 11. I could find an alternative if I had to but my kids are reluctant they say 'go on mum you drive us – it is easier.'"

"Those people who criticise school runs – they don't have kids."

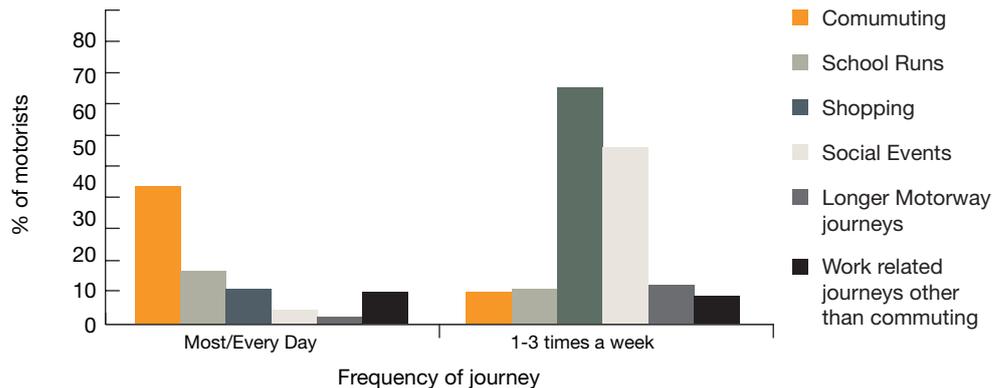
The question that remains is what more can be done to change the expectations of children and the behaviour of their parents?

Figure 2 Distance of commute



⁴ Commission for Integrated Transport. A new approach to the school run – Professor David Begg. November 2004

Figure 3 Journey type and frequency



Shopping Trip Toll

Our survey suggests that driving to the shops also has an impact on traffic.

The growth of shopping malls and out-of-town retail parks is, no doubt, partly responsible for the increased use of cars along with a rising market share for supermarkets that cater for the weekly food shop – a bulk re-stocking exercise almost impossible without a car. Indeed, shopping now accounts for more mileage than either commuting or the school run – 28% of the total. 67% of motorists use their car for shopping trips at least once a week – down from 75% in the 2004 RAC survey. But just 10% drive to buy goods more than three times a week – a quarter of those who commute by car frequently.

Jam-Busting Broadways: Carrots or Sticks?

In last year's report, motorists made it clear that they felt under constant attack from a number of measures, which made their daily drive a miserable experience. Road humps litter residential roads, speed cameras keep a constant vigil and private traffic wardens employed by local councils are ready to pounce along with their clamping counterparts and tow-away squads wherever they park.

Large numbers also view road pricing with suspicion despite Government assurances about the positive impact that variable fees potentially costing up to £1.34 a mile (based on the DfT's feasibility study⁵ and depending on type of road and time of day) will have on congestion. Road pricing will require all cars to be fitted with tracking devices and the same feasibility study indicated that 2016 is the earliest it could be introduced. The concept will be addressed in greater detail

later in the report where the increasing adoption of technology in cars is assessed.

Capital-style congestion charges were hailed a success after London saw congestion slashed by 30% along with an 18% fall in traffic and an 18% cut in CO₂ emissions from vehicles. Car journey times are 14% faster, bus use has risen by a third and 80% of people believe it is easier to get around, or at least comparable to conditions before the charge was introduced.⁶ In 2004/5 net revenues of more than £90 million were generated, of which the majority (80%) was invested in improved bus services.⁷ Despite this, there remains sizeable opposition to the congestion charge. Figures reveal that the difference in levels of opposition to the congestion charge against those in favour are slim (44% compared with 40%) so there are opportunities to develop greater levels of support. However, the Government must do more to educate motorists about the environmental benefits and the positive effect on journey times as well as provide visibly improved public transport initiatives and better workplace travel options.

A western extension to the current congestion charging zone has been proposed and will include much of Westminster, Chelsea and Kensington. The extension goes live on 19th February 2007.

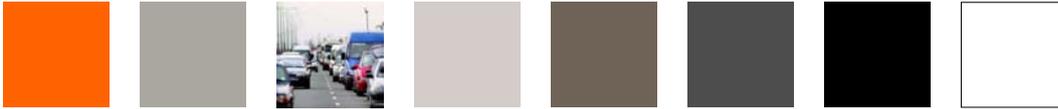
Support for the extension has so far been thin on the ground. The April 2004 consultation revealed that 72% of businesses and 62% of all 102,000 respondents were against the scheme.

Similar congestion charging schemes are also being mooted in other towns and cities around the

⁵ Department for Transport. Road Pricing Feasibility Study. July 2004

⁶ Transport for London Central London Congestion Charging, Impacts Motoring – 2nd Annual Report April 2004

⁷ Transport for London. Central London Congestion Charging, Impacts Monitoring – 3rd Annual report. April 2005



UK but could face stiff opposition from local people and will only go ahead if highways authorities persuade voters that the benefits outweigh the costs.

In Edinburgh, for instance, plans for a £2 charge were abandoned after a referendum went against the proposed scheme with 74% voting 'no.'⁸ This was despite the promise of extra investment in public transport financed by the money raised.

Motorway tolls are another controversial option but the experience of the M6 Toll has done little to convince the doubters. The 27 mile stretch was designed to alleviate appalling congestion on the M6 around Birmingham but traffic figures have been disappointing. A price rise to £3.50 for cars and £7 for lorries further deterred drivers from using it despite claims by Midland Expressway Limited (MEL) that up to 45 minutes can be shaved off the journey from Junction 4 on the M6 at Coleshill, Warwickshire, to Junction 11 near Cannock, Staffordshire. This might suggest that capping tolls would be one way of ensuring tolled-roads are fully utilised and integrated within the transport network.

In February this year, average daily traffic was just 42,240 vehicles – a decrease of 1.6% from February 2005 that compounded a six-month downward trend.⁹ The poor performance means that plans for a second toll motorway alongside the M6 between the West Midlands and Cheshire look set for a rough ride.

High occupancy vehicle (HOV) lanes – commonly known as car-share lanes for vehicles with at least one passenger – are the latest initiative from former Transport Secretary Alistair Darling. In March this year, Mr Darling announced the go-ahead for the first on a UK motorway at the junction of the M606 and M62 between Bradford and Leeds in West Yorkshire. The £2.5 million project is expected to cut journey times by an average of eight minutes during peak periods once operational in 2007. A more ambitious scheme on the M1 between junctions 7 and 10 is underway and is due to open in 2008.¹⁰

Some environmentalists want them on all motorways and Steve Hounsham, of Transport 2000, said: "There should be a car-share lane on all our motorways." Although positive, Transport 2000 argue that such a measure needs to be carefully thought-through given experience in America where HOV lanes are under-used or where drivers jump queues in return for a fee. "A car-share lane on its own is a dead end; it must be accompanied by workplace travel plans and other measures to actually sell car-sharing and other measures to people."¹¹

We would suggest that HOV lanes are far more suited to radial routes such as the M3, M4 or M11 than to orbital routes like the M25. It is far more likely that there will be opportunities for people to car share going into or out of a city than on a journey involving an orbital trip. As a result, we believe each proposal should be carefully considered on its merits and HOV lanes should not be automatically included on all motorways.

**Peter Hendy, Commissioner
Transport for London**

Although there is always scope for improving public transport, we believe that one of the keys to modal shift is better information about journey options. Many people do not realise how easy it is to inter-change between different modes of transport and make journeys that appear complex and time consuming. Hence our emphasis on integrated information and ticketing.

If congestion charging is the 'stick' then talking to people about transport alternatives is the 'carrot.' We are spending a lot of time and resource helping people with their travel planning. This involves providing a Journey Planner on the internet that can present a choice of multi-modal options for getting from one place to another, and personalised travel planning so individuals can be aware of what choices there are to do many short journeys other than by car.

⁸ Commission for Integrated Transport. The Parliamentary Monitor: Edinburgh congestion charge – Professor David Begg. March 2005

⁹ Midland Expressway Limited. www.m6toll.co.uk March 2006

¹⁰ Highways Agency. News release – UK's first motorway car share lane to be built on M606/M62 in West Yorkshire. 20 March 2006

¹¹ Transport 2000. News release – M62 car-share lane must be accompanied by workplace promotion, say campaigners. 20 March 2006

In July 2004, within the Government's White Paper The Future of Transport, the Secretary of State for Transport announced the creation of the Transport Innovation Fund (TIF).¹² The Fund's over-riding objectives are to tackle congestion and improve productivity. Money from the TIF will become available from 2008/09 and is forecast to grow from an initial £290 million to over £2 billion by 2014/15.¹³

In 2005, pump-priming funds were made available to a limited number of local authorities to assist in the development of schemes, in advance of decisions on substantive TIF funding. Local authorities had to bid for these funds and proposed schemes focused on how authorities might combine demand management and better public transport to tackle congestion. The seven

successful bidders that have so far received a total of £7million to fund feasibility studies are:

- Bristol City Council, Bath and North East Council, North Somerset Council and South Gloucestershire Council
- Cambridgeshire
- Durham County Council (for Durham City)
- Greater Manchester
- Shropshire County Council
- Tyne and Wear
- West Midlands conurbation

Archie Robertson, Chief Executive Highways Agency

For most of the network there are still very distinct peaks in demand around the morning and the evening. Clearly it would be beneficial if there was a lifestyle or behavioural change in people whereby they did not all drive in the same areas at the same time.

As people's journeys becomes less and less predictable, they start varying the times when they travel to see if they can achieve a higher quality of journey. However once a peak reaches a certain period then it flattens out and the benefit of travelling at an off peak time, diminishes.

Travel planning has a lot to offer in as much as it provides a structure around a business looking at alternative ways of getting their employees in and out of work. This can be achieved by using resources better such as car sharing or buses, other forms of public transport or by having more flexible working times.

There are three possible interventions to help with congestion from a demand management perspective. One is the travel plan, second is planning development controls, the third one is financial incentives or congestion charging.

Alternatives To Car Use: Public Transport

Available figures show that the UK systematically invested over 30 years about 0.1 – 0.2% of GDP per annum less in public transport than Germany or France. Since UK GDP has been about 1/3 less than Germany's, the actual expenditure per head would have been about 30% less.¹⁴

Authorities are finally attempting to reverse the years of under-investment that has hindered bus and train operators in the introduction of efficient, modern fleets. But the boost in capital spending has yet to bear fruit on the buses outside London. According to the National Audit Office, fewer people clambered aboard in 2004 – 05 in any of the English regions except the capital, which accounted for 44% of total journeys.¹⁵ On the trains, many passengers may travel in newer rolling stock but they faced above-inflation fares increases in January ranging from 3.9% to 8.8%.¹⁶

The majority of Britain's motorists, themselves, (69%) want a visible improvement in public transport provision if they are to accept congestion charging but opinions are again divided on whether they could use buses and trains or cycle and walk more often. More than a third (37%) agree that alternatives to the car are a realistic option but 43% disagree.

One thing they do agree upon, though, is that it would be very difficult to adjust to life without a car – 87% agree with that sentiment, including 65% who 'strongly agree.' Company car drivers and rural

¹² Department for Transport. The Future of Transport (White Paper). July 2004

¹³ Department for Transport. News Release – Tackling Congestion – The Next Steps. 28 November 2005

¹⁴ Speech to European Transport Conference. Sustainable Transport. The Investment Challenge. Jack Short, Secretary General, ECMT. September 2002

¹⁵ National Audit Office and Audit Commission: Delivery Chain Analysis for Bus Services in England. December 2005

¹⁶ BBC News Online: Rail fare rises come under fire. 2 January 2006



residents are most firmly joined at the hip to their cars with 91% of each of the same opinion. Only 55% of city dwellers, on the other hand, assert that they could not possibly live without one.

The research suggests that many motorists believe they will be left with no viable alternative unless the public transport network improves. Sixty-five per cent already regard fares as prohibitively expensive. A similar proportion (64%) claim buses and trains would leave them stranded a “significant distance” from where they want to go on regular journeys. Those living in suburban and edge of town (40%) as well as rural locations (38%) are significantly more likely to be put off by this than those in urban environments or city centres (24%).

This perception is not helped by a continued lack of spending. Indeed, the English Regions allocated an overwhelming 72% of their transport budgets to roads. Two Regions – the East Midlands and the South East – spent a staggering 95 per cent of available funding on roads schemes, leaving less than 5% for public transport schemes.

In the light of such low investment in a system bursting at the seams during peak times, the question remains as to whether buses and trains can ever satisfy demand on a sufficient scale.

Alternatives To Car Use: The Employer's Role

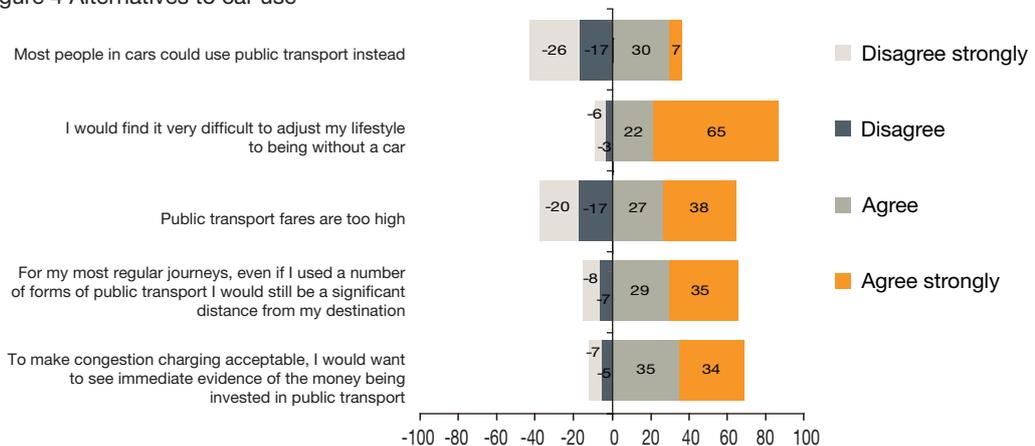
UK plc bears the cost of congestion as much as private motorists. The business leaders' group CBI estimates that congestion costs British industry £20 billion a year and has called for extra investment to reduce the burden. “Although transport spending has risen in recent years, there are decades of under-investment to deal with and it is clear that business still finds it far too difficult to get its goods to market and its people to work,” said Director General Sir Digby Jones.¹⁷

But business leaders themselves could be criticised for failing to do their bit by not adopting ‘green’ travel plans to reduce car use. The Energy Saving Trust found that more than a quarter (29%) of HR personnel directors have no understanding of what this involves and 59% admit their knowledge is ‘limited’ or ‘basic’.

More than half (53%) acknowledge that fuel costs have had the biggest recent impact on their employees but seven in ten (71%) confess their organisation has no travel strategy.¹⁸

This is despite demands from nine in ten workers for help from employers with alternative travel options to ease the cost of commuting. Showers and secure bike parks for cyclists top the list of requirements for 69%. Season ticket loans for public transport (63%) are the next most popular request followed by tele-conferencing or home working (58%) and car-sharing schemes (50%).¹⁹

Figure 4 Alternatives to car use



¹⁷ BBC News Online. Spend more on transport, says CBI. 28 November 2005

¹⁸ Energy Saving Trust. News release – HR directors to call in experts as workers demand transport solutions. 21 September 2005

¹⁹ Energy Saving Trust. News release – UK workers call on bosses to ease £609 million monthly cost of driving to work. 15 September 2005

Nigel Underdown, Head of Transport advice at the Energy Saving Trust, says it is now “crucial for employers to take action.”

But it is clear that there is a long way to go before travel plans become the norm within the working environment.

Congestion Charges: Will Drivers Pay The Price?

The majority of drivers may want tougher action to alleviate bottlenecks but the country is divided on the need for new measures that will undoubtedly hit them in the wallet.

Acceptance for a new direction is strongest in the West Midlands. Despite the introduction of the M6 Toll, 84% agree something drastic needs to be done to shorten queues. The West Midlands is classified as one of the country’s largest urban areas and experiences significant problems with congestion. In July 2005, local surveys showed that drivers rate congestion as the second most important issue after crime, but ahead of education, housing etc.²⁰ With figures suggesting decreasing numbers of motorists using the M6 toll, it seems more needs to be done to solve the region’s congestion problem.

The findings indicate staunch backing (76%) amongst respondents in Transport Innovation Fund (TIF) regions but motorists in the East Midlands and South East are the least convinced and express much lower levels of agreement – just 8% and 15% respectively ‘agree strongly’ that significant steps need to be taken.

The divisions appear deepest over congestion charging. The findings suggest that 59% of motorists in TIF regions see it as unfair, compared with 48% recorded in non-TIF regions.

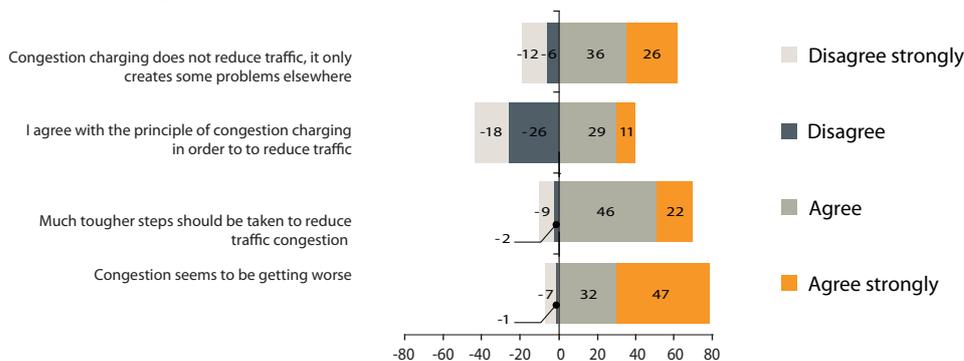
Motorists throughout London, where 63% regard congestion charging as inequitable, are also amongst the most strongly opposed. This could be due to the fact that central London commuters have actually been paying the congestion charge since it was first levied in February 2003.

Owners of ‘multi-purpose vehicle’ people carriers – MPVs – are most against charges with 58% considering the mechanism iniquitous. Young drivers appear the least resistant – 39% say they are unjust.

In addition, 62% overall believe that it merely displaces congestion elsewhere – a conviction borne out by the initial experience in London where traffic on the edge of the charging zone increased after a £5 fee was introduced.

More than a third of Londoners (35%) are in no doubt about the validity of the displacement theory and 34% in the North West are of the same opinion. It seems that TIF region motorists, on the other hand, have a below average propensity to believe this (23%) while the research indicates that those in non-TIF regions are more likely than average to think congestion gets worse on the edge of zones (28%). It could be argued, however, that this lends weight to the case in favour of a nationwide road pricing scheme capable of ironing out these problems.

Figure 5 Views on Congestion



²⁰ West Midlands Metropolitan Authorities. Transport Innovation Fund bid. October 2005



The challenge for policymakers is to win the hearts and minds of motorists whose scepticism is an issue that needs to be addressed before the introduction of charges. The Local Government Association acknowledges that the success of road pricing depends on local authorities first providing a reliable and affordable alternative so that motorists can weigh up their choices before being forced to pay for the privilege of using their car.²¹ Unfortunately, the track record of transport authorities does not appear to have matched that criteria and Jonathan Bray, Assistant Director of the Passenger Transport Executive Group, says, “peak hour overcrowding is a growing problem.”

David Hall, chairman of Royal Institute of Chartered Surveyors Land Use and Transport Policy Panel, is equally critical. “An investment programme geared to expanding the road network and not growing the railways would be nonsense,” he says. “The Government policy of road charging will be immensely unpopular if we don’t let the train take the strain of increasing travel demand.”

Overall, our research reveals a frustration for something to be done. Commuters are wedded to their cars, parents tied to the school run and shoppers reliant on a runabout to cart home the groceries. Motorway tolls are not readily accepted and work-based green travel plans have yet to have any significant impact on the daily commute. Successful schemes to encourage more responsible driving will need a mixture of carrot and stick. Proof is available however, of smaller scale successful schemes making big steps when it comes to changing motorists’ behaviour. In Belfast for example, the Department for Regional Development has launched ‘Travelwise NI’, an online scheme which matches drivers wishing to car-share. Operating free of charge, the scheme builds on a successful pilot scheme run by the Northern Ireland Civil Service.

In London, the congestion charge has undoubtedly had an influence on travel but remains deeply unpopular in the capital and elsewhere. In the UK the vast majority of motorists are fed up with the constant queues and many are prepared to accept tough measures to get traffic flowing again. The question that remains, therefore, is what price motorists are willing to pay for smoother motorway journeys. The Government must also weigh up whether motorists will swallow the congestion charge potion prescribed as a panacea to cure the traffic-choking disease afflicting Britain’s roads.

Conclusion

Traffic management measures being introduced including ramp-metering, mandatory variable speed limits and high occupancy vehicle lanes are to be welcomed and the results of the Active Traffic Management Project (ATM) on the M42 are awaited with interest. These measures alone are not enough and RAC has long supported the principle of road pricing as a means to tackle congestion on our roads.

However, our support for such schemes is dependant upon the principles behind its introduction and how these are given effect in practice. The prime objective for road pricing should not be to raise revenues but must focus on easing congestion. Any revenues generated should be spent on improvements in public transport and selected road building to ease bottlenecks.

Richard Turner, Chief Executive Freight Transport Association

The ability of the operator to say I’ll pay a bit more because I know I’ll get a reliable journey is quite attractive.

The FTA is fully behind distance based charging for all vehicles including lorries, as it gives the operator a chance to buy a reliable road. It doesn’t matter how efficient the operators’ logistics and planning is if the networks used are heavily congested. Congestion is the scourge of modern supply chains.

My members would like to use the roads more at night. Freight doesn’t mind travelling at night, but the problem is making delivery and collection at night as it disturbs people. At the moment there are lots of restrictions on when you can deliver and collect goods, we call them curfews. One of the things we’ve got to do as a society is to make it easier for lorries to travel at night. The last thing we want to do is to continue to force lorries into the peak hour traffic when we don’t need to.

Therefore, we must reshape some of the rules so that lorries can use our infrastructure more fully throughout the 24 hour period.

²¹ Local Government Association. Just down the road? The future of road pricing – a local government perspective. February 2005

Issues such as the risk of displacement from tolled roads to uncharged roads and the related road safety implications, the availability of alternative routes and transport options at the location of a proposed charging area should be thoroughly examined when taking charging forward. Such an approach should reduce congestion while also ensuring public choice.

What is clear from this research is that motorists are also prepared to accept tougher measures to address the problems of congestion and they too have clear conditions. Motorists want to see the provision of visibly improved public transport alternatives, better workplace travel options and a financial trade-off on the motoring tax burden.

The development of regional pilots through the Transport Innovation Fund is to be welcomed and these local schemes will be useful to inform debate. However, Government needs to focus on the national picture and ensure there is a consistent approach across the country in terms of technology, charging and exemptions or discounts to ease any administrative burden on business and to avoid confusion for the general motorist.

Currently, there are more questions posed than answers given on road pricing in the UK. It is essential that Government provides clarity on the objectives of any road pricing scheme to enable informed debate and start the process of gaining public consensus.

It is not enough to simply invest more in transport – local and national authorities need to demonstrate visible improvement in public transport provision and service. Government should ensure this is a condition of any road charging scheme.

Whilst accepting there will always be a reliance for many on the car, consideration should be given to encouraging motorists out of their car for even part of their journeys by, for example, investing more in car parking at railway stations and in park and ride schemes.

Chapter 3 Technology: Miracle Cure or Palliative Care?



Road pricing: The road ahead.

Former Transport Secretary Alistair Darling made it clear that 'pay-as-you-go' road pricing is the Government's big idea to transform the future of motoring and the UK will become the first country in the world with a nationwide road pricing scheme.

"Looking ahead we need to make tough choices. That is why I believe road pricing has an essential part to play. Make no mistake, simply building more roads cannot be the answer," he said. "As I have made clear, road pricing is about charging according to distance and congestion."¹ It remains to be seen what his successor, Douglas Alexander will do to develop this strategy but he has committed to explore the scope for developing a national system of road pricing.

Telematics technology is crucial to Alistair Darling's proposed plan to charge motorists for each and every mile they drive – "the question we need to ask ourselves is how we could use technology like this to deliver national road pricing that would work for the UK...the Department for Transport will be doing more research here as well as talking with industry."² As mentioned earlier, the Government is exploring the potential of introducing national road pricing, possibly in approximately ten years time, that relies on tracking vehicles and charging owners depending on how far – and, possibly, at what time of day or type of road – they have travelled. Not only are they likely to be charged per mile but they also face the prospect of higher charges on congested routes and during rush hours.

But there are serious questions about the system. The Government will need to do more to convince people that it is not just another tax on motoring if it is to be widely accepted. It will need to persuade drivers that it is equitable and will bring wider benefits for the creaking roads network along with the promise of lower fuel tax or vehicle excise duty. Indeed, our findings suggest road pricing will attract a greater level of support if motoring taxes are cut and the extra money spent on road improvements.

A potential source of concern for ministers is that just a quarter (25%) would support compulsory road pricing for all cars based on a satellite tracking and charging scheme capable of calculating speed and position. This compares to 53% who oppose it and three-quarters (75%) that back the measure if applied to foreign truck operators in order to extract a contribution towards the wear and tear they cause on Britain's roads.

Support however does appear to be growing compared with previous years – an increase of 6% since 2004. It could be that motorists are starting to recognise the role for such a device in future plans to ease road congestion.

Furthermore, reassurances that such technology will be very precise and accurate in measuring distances make a dramatic difference. On this basis, levels of support grew with 44% of respondents stating in principle they would accept the concept of road pricing using telematics technology.

The most resistant regions are the North East where just 14% support road pricing and Yorkshire & Humberside (20%). Above average support is evident in Scotland (43%), the West Midlands (34%) and London (29%).

Many doubters fear they will get a raw deal even if the money raised is used, as suggested, to reduce other motoring costs by slashing fuel tax or abolishing vehicle excise duty.

It is essential, therefore, to examine motorists' current predilection towards technology along with their anticipated exposure to additional expense under road pricing. This will offer an understanding

¹ Rt Hon Alistair Darling MP. Speech to Social Market Foundation. June 2005

² Rt Hon Alistair Darling MP. Speech to Social Market Foundation. June 2005



of their preferences for the road ahead and evaluate whether the technology can offer added benefits that may increase levels of support still further.

SatNav savvies: techno-friendly or technophobe?
The example of satellite navigation (SatNav) devices illustrates to what extent the successful uptake of new technologies is dependent on pricing. SatNav devices have become the 'must-have' aftermarket accessory for a growing band of drivers and motor manufacturers predict that all new cars will be fitted with systems by 2010. The cost of a basic dashboard route guidance unit has plummeted to as little as £150 and retailers reported that SatNav was a top gadget gift last Christmas. Not surprising, therefore, that – as with mobile car phone kits a few years ago – police are warning that SatNav has become a firm favourite for car thieves, too.

At present, relatively few have embraced the technology but the chart below implies that the mushrooming technology market has a long way to go before reaching saturation point.

Responses also indicate that drivers are more likely to embrace technology the cheaper it is to buy a device. Prices below £150 are likely to spark a stampede for aftermarket units and as many as 50% of Britain's motorists would purchase one if it fell to £40.

**Stewart Berman, Executive Director
TrafficMaster**

As the black box becomes more and more standard on vehicles, it will become easier to roll out the telematics system as most cars will already have it.

In terms of timing, the barriers to introduction are entirely political, rather than practical. The back-end services are available and ready, so there is no major barrier to roll this system out soon – but it is down to the government and whether they feel they can introduce such measures without massive motoring backlash and political fall-out.

Revenue raiser: cash cow or fiscally fair?

Despite the strong opposition to compulsory road pricing (in its most basic form) expressed previously, the results suggest that two-thirds (67%) would be prepared to accept road pricing if it also heralded a reduction in road tax or fuel duty. This overwhelming support by far outnumbers the one in five (20%) who would still require convincing.

Indeed, 63% would also back road pricing if all the money raised was spent on improving roads compared with 43% support even if all the money were spent on improving public transport.

Figure 6 Current Penetration of Technology

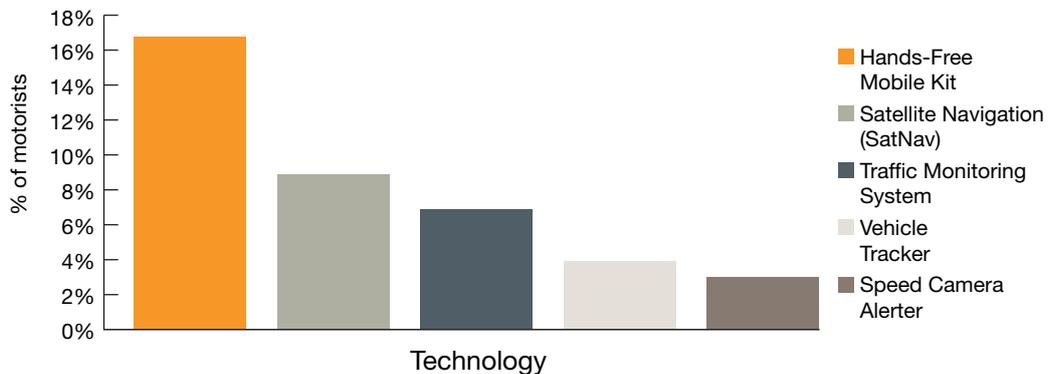
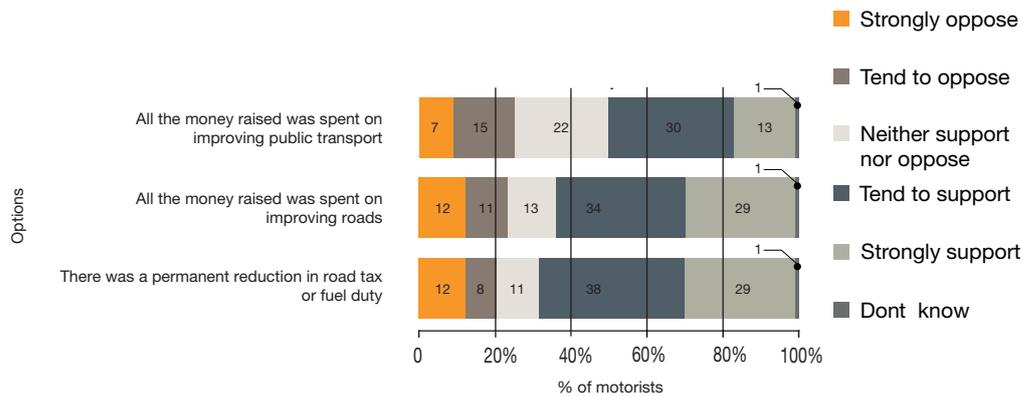


Figure 7 Conditions to road pricing



**John Seaton, Underwriting Director
Norwich Union**

If you ask the average person on the street about telematics technology there is still a limited understanding.

As it becomes more generally accepted I think there will be an evolution towards insurance and pay as you drive offerings, both for the private motorist and the commercial fleet manager.

Norwich Union has embraced in-car technology through telematics to explore the potential benefits for our motoring customers, enabling them to take control of their monthly motoring insurance bills. Taking that first step has been valuable to understand the motorists views especially topics such as big brother, and to our surprise it has not been an issue.

The concept of pay as you drive will gradually gather pace but it will appeal to some more than others.

I think it will be important to demonstrate the benefit of this in-car technology. For example, the benefit of additional functionality such as satellite navigation and enhanced recovery services for stolen vehicles.

Government could bring the majority of motorists on board by demonstrating the tangible benefits of such a scheme and reducing the motoring tax burden.

Fairness is another crucial consideration that will inevitably affect motorists' acceptance of road pricing. When questioned about the most equitable method of calculating bills, the majority considered overall annual mileage to be the fairest option. This was in contrast to high levels of opposition to 'unfair' higher charges for driving during the rush hour, on town centre roads or on motorways.

Sixty-six per cent supported such a regime that evened out the liability between all drivers rather than singling out those using the busiest roads for bigger bills.

The majority (52%) also thought that annual mileage would be the most effective method of cutting queues compared to financial disincentives on congested routes.

But, once again, our research findings reveal a mixed reaction to the specific remedies on offer.

Fifty-five per cent regard charges for using town centre roads as unfair compared to 25% who believe them to be equitable. In addition, 44% think they are effective compared to 38% who say pricing cars off urban roads is futile. This could imply that urban motorists have little wish to pay extra despite tending to recognise that it could improve their experience at the wheel by cutting queues.

The motorists most aggrieved about town centre charges are in the North West where 69% consider them unfair. Londoners, who have lived with the congestion charge for three years and evidently feel £8 per day is too high a price to pay, are the next most upset (64%).



A proposal for higher charges during rush hours is also regarded as unjust by 55% compared to 29% who say it is fair. The measure would have a positive impact, according to 44%, but 39% see graduated fees as ineffective.

Surprisingly, 40% of London motorists consider peak charge levies fair, whereas 67% in the North West believe them fundamentally iniquitous.

The prospect of motorway tolls appals 57% compared to 26% who accept their probity. But they are seen as the least effective measure overall with just 35% believing they would cut congestion but 45% suspecting that they would not.

It has been suggested that bills could range from 2p to £1.34 per mile but it is impossible to gauge the exact response until the Government

announces a specific scale of charges. But we were able to elicit reactions to hypothetical scenarios that offer a trade-off between higher mileage rates and lower annual fees.

High yearly fees coupled with low mileage rates tend to benefit high mileage drivers at the expense of those that use their car less frequently.

Conversely, low annual amounts and high rates per mile work in favour of those who drive the shortest distance.

Of those who accept road pricing, nearly four times as many (32%) favoured a lower upfront fee that would soften the blow for low and average mileage drivers compared to a high annual levy (9%).

Figure 8 Fairness of charging criteria

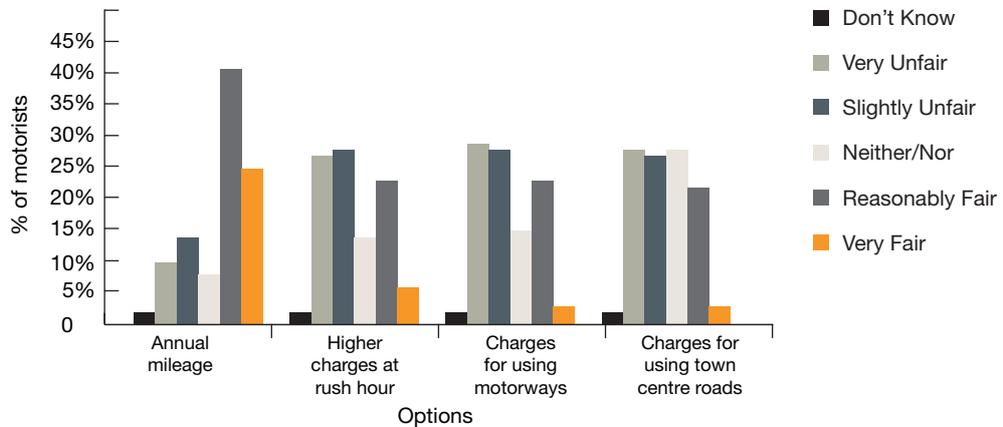
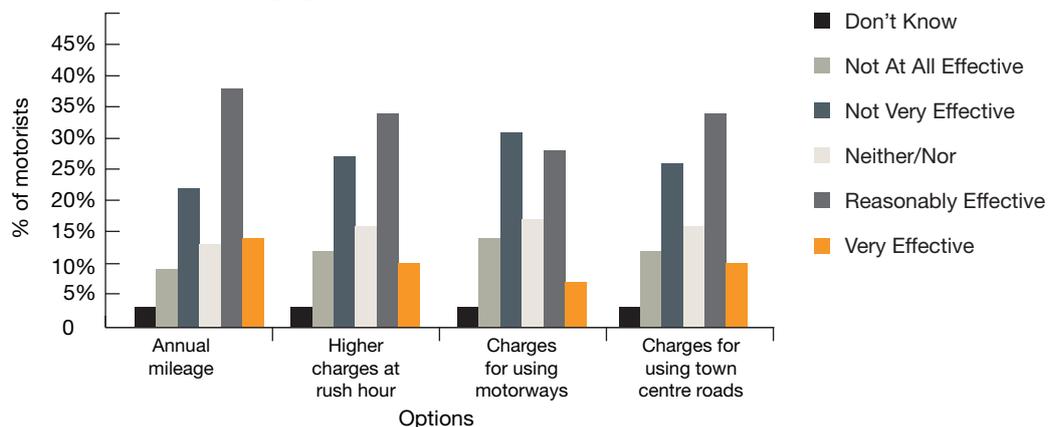


Figure 9 Effectiveness of charging criteria



Road Pricing : Cutting a deal with motorists

Technology is advancing so rapidly that telematics is now no longer simply about tracking vehicles and as such presents an excellent opportunity for Government in winning motorists round to a road pricing scheme. Now, satellite navigation units are all the rage and the system can be adapted to offer a range of other services. Norwich Union is also piloting the use of a telematics device, installed in a vehicle, which collects and transmits data on where, when and how often a car is driven – ‘Pay As You Drive’™ insurance. The aim is to offer fairer insurance premiums and to allow motorists to budget for their insurance by changing their behaviour to drive more safely.

The trend suggests that policymakers may be well advised to consider whether road pricing would receive a more positive reception if motorists were offered additional driver-friendly features to improve the appeal of a national charging regime.

Our representative sample was given the option of a range of potential benefits that technology could offer to compile a list of the most appealing features.

Anti-theft vehicle tracking is the most highly-valued facility and it could easily be incorporated in a road pricing device fitted to cars to monitor road use. Just 4% of motorists have one fitted but almost nine in ten (87%) want one.

Re-routing gizmos that guide drivers around traffic hold-ups on the road ahead are the second most desirable option with four out of five (80%) placing them high on their wish list. Seventy-two per cent

were also tempted by the possibility of being routed to avoid road charging routes.

A panic button that raises the alarm in an emergency is the third most appealing function – particularly with women, of whom 83% would like one. This is also valued highly by the over 55-year-olds (80%) and, regionally, motorists in the West Midlands (90%) and Wales (89%) are the most keen on the capability.

These motorists would be encouraged by the situation in Europe. MEPs on the Committee for Transport and Tourism are recommending that the European Parliament “supports and encourages” the European eCall initiative – the harmonisation of in-vehicle emergency call, Europe-wide – that “could save up to 2,500 lives a year and bring about a reduction of up to 15% in the gravity of injuries”.³

But the results indicate that satellite navigation may be a bit of a ‘Boy’s Toy’ phenomenon – 40% of men say the functionality is ‘very appealing’ while only 30% of women display the same level of interest. Company car drivers expressed the highest level of interest (58%) along with those driving in excess of 13,000 miles per year (51%). And it was more a hit with younger drivers aged between 17 and 24 (40%) than those over the age of 55 (32%).

Unexpectedly, speed camera warning systems were the least popular but 63% still aspire to have one and a navigation system that guides drivers to the nearest fuel station, car park or restaurant had some appeal for 64%. Younger 17-24-year-old drivers were particularly enthused by both facilities – 73% and 77% respectively.

**Trevor Wedge, Chief Driving Examiner
Driving Standards Agency**

Very often the benefits of technology only come into play if people are fully trained in how to use them.

For example, ABS was introduced a many years ago into luxury saloons but these days it is quite difficult to find a new car without ABS fitted. However you only realise the benefits of ABS if you understand what it can do and how to operate it.

Many drivers these days don’t know how to use the technology effectively though as its use filters down to the smaller cars it is starting to be introduced into driver training programmes

Other technologies on the horizon

As the potential basis for the Government’s road pricing strategy, telematics technology is a major preoccupation. Other technological advances could pave the way for a very different driving experience in the not-too-distant future. There are a number of in-car devices being considered, just some of which include electronic speed limiters, anti-driver tiredness devices and a system to prevent motorists driving too close to the car in front.

Department for Transport recently commissioned research from Leeds University to investigate the impact of installing speed limiting devices to vehicles. Based on previous research, it is predicted that intelligent speed adaptation will

³ European Parliament. News release – “Intelligent cars” that call Emergency services could save lives from 2009. 27 April 2006



achieve a 36% reduction in injury accidents in the UK and a 58% reduction in fatal accidents.⁴ Basic devices provide an audible warning when the speed limit is exceeded, whereas a more advanced version allow a braking system to be applied.

This year, Honda launched their Accord ADAS which includes a camera system to prevent deviation from driving lanes.⁵ Honda has also introduced its 'collision mitigation braking system' which applies the brakes and gives drivers a potentially unwelcome tug on the seatbelt when the vehicle gets too close to the one in front.

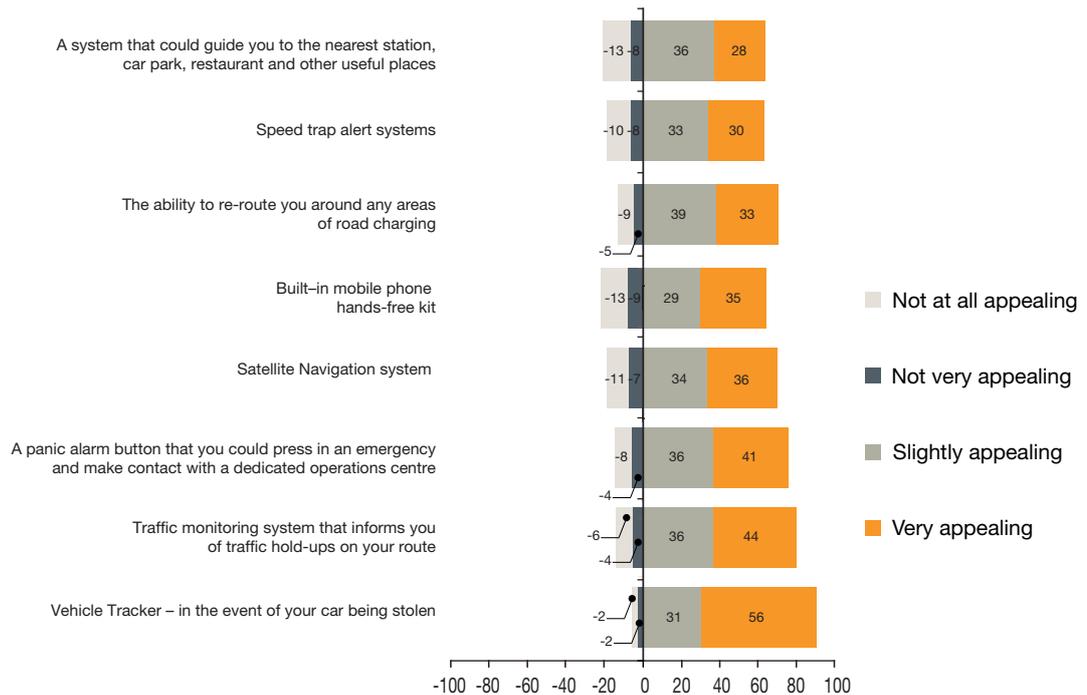
Vehicle manufacturers are now focusing not only on passenger but also pedestrian safety. Euro NCAP publishes the official star ratings, which are now widely reported. The Citroen C6 received the first ever maximum star rating for pedestrian safety and featured a pioneering 'pop up' bonnet which provides greater clearance between the bonnet and rigid part of the engine.

A number of technological devices not built in to the car have also generated a large amount of interest. Road humps that automatically disappear if drivers are travelling at safe speeds have also been tested in the UK. The Transcalm prototypes are designed not only to reduce inconvenience to safe drivers and the emergency services but could reduce pollution too. However, the cost of such a device – £4,000 each – means they are unlikely to become widespread.⁶

Securing support: conditions for success

The opinions expressed in this year's report indicate, therefore, that there is scope to achieve considerable buy-in for road pricing by setting out a fair basis for charging, highlighting the benefits of technology that would underpin such a scheme and outlining the scope of potential reductions on fuel tax and tax discs.

Figure 10 Appeal of different technology options



⁴ Institute of Transport Studies, Leeds University. Intelligent speed adaptation – project summary.

⁵ Honda UK Media Centre. January 2006

⁶ NewScientistTech.com. Article – Smart speed bumps reward safe drivers. August 2001

Low penetration of in-car devices coupled with British motorists' evident aspiration for them suggests that driver-friendly services could constitute useful bargaining chips. The Government should consider including, at the very least, a panic button linked to the emergency services as part of the package. It would also do well to ponder whether to offer an anti-theft service or route guidance facility to encourage the uptake of telematics technology – and with it an acceptance of road pricing.

Conclusion

Telematics technology is shown to be popular with motorists and combining it with other benefits including satellite navigation, vehicle tracking or an emergency panic button could encourage take-up beyond the usual “early-adopters” of new technology.

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 schemes.

When it comes to paying for the technology, the motorist may prefer to “upgrade” their vehicle by opting for air-conditioning, an MP3 player or mobile phone hands-free kit. To ensure a high level of penetration in vehicles, we believe the Government should lead the debate to mandate in-car technology for all new vehicles and provide incentives to encourage take-up.

Chapter 4 Greener Motoring

The race to cut emissions: Barriers to good intentions.

To improve the uptake of green motoring, Government and manufacturers must understand the priorities of UK motorists – top of the list for choosing a car is price.¹ How can Government, in particular, square this with the need to promote environmentally friendly practices?

Recent developments mean car manufacturers the world over are devoting a huge amount of research and development resources to the development of less polluting cars and hybrid petrol-electric vehicles are becoming less of a rarity on the road. The incessant increase in fuel prices has already spurred some buyers to consider greener alternatives and the construction of Britain's first production facility for bioethanol – tomorrow's green fuel made from plants – is underway in Norfolk.

Oil companies are also attempting to exploit environmentally-friendly sources of energy in the face of warnings that once-gushing oil supplies will dwindle to a trickle. BP, for instance, is investing \$8 billion in alternative energy in a bid to reduce greenhouse gas emissions by 24 million tonnes a year – equivalent to taking six million cars off the road by 2015.²

In ten years time, road pricing may also become part of the solution by reducing the amount of fuel consumed by cars stuck in jams but a growing band of motorists appear concerned about what they can do today to cut greenhouse gas emissions.

Our survey suggests that many are merely responding to the squeeze on fuel prices as the £1 litre arrives at the pumps. Indeed, four out of five (80%) rate better fuel economy as the biggest factor in any decision to switch to a greener fuel. More heartening is the evidence that motorists wish to do the right thing, with 72% lured by the prospect of lower emissions.

Sometimes contradictory tax incentives that favour greener cars are already attempting to gradually shift buying patterns in favour of less polluting vehicles. In tandem, manufacturers such as Toyota and Honda are developing less-damaging alternatives to conventional petrol and diesel engines in a bid to tap into a growing market inhabited by environmentally-conscious consumers who want to preserve the planet.

But our research reveals that an alarming amount of inertia is putting a brake on motorists who, deep-down, want to go green. Just 7% strongly agree that it is 'realistic' for motorists to take account of environmental issues when buying a new car. And it appears that many will simply sit on the fence until the majority of vehicles on forecourts can claim green credentials. In fact, 43% say they will not switch until other drivers go green.

The question remains as to what can tip the balance to promote greener, cleaner cars and satisfy an untapped demand for vehicles that are kind on the conscience – and on the wallet. Our findings indicate that the Government could do more to encourage greener cars.

Global warming

Transportation in the UK is now estimated to be responsible for 21.3% of UK CO₂ emissions – the main cause of climate change.³ Although improved vehicle design means CO₂ emissions have decreased, motorists continue to choose larger, more powerful cars and use them more often.⁴

¹ MORI research on behalf of the Department for Transport. Assessing the Impact of Graduated Vehicle Excise Duty: Quantitative Report. June 2003

² BP.com. Web article – Environment and Society – Overview

³ BBC News Online. UK to miss CO₂ emissions target. 28 March 2006

⁴ Department for Transport. The Future of Transport: A Network for 2030. July 2004



In the short term, emissions of carbon from road transport are expected to grow by about 10% from 2000 levels by 2010. This is because increased levels of traffic will offset improvements in fuel efficiency. Emissions from other sectors are due to fall in the same period, so transport's share of total emissions is likely to increase substantially. Slower traffic growth and continued fuel efficiency improvements are expected to produce a fall in road traffic CO₂ emissions of around 5% between 2010 and 2015, with further falls thereafter.⁵

The British government claims a commitment to fighting global warming by cutting greenhouse gases in every sector and has set itself targets tougher than those laid down by the controversial Kyoto Protocol. But Britain will fall short of its own target to reduce emissions of carbon dioxide by 20% by 2010.

Several cabinet ministers have exchanged their thirsty Government cars for a Toyota Prius petrol-electric hybrid model. Opposition leader David Cameron has swapped his Vauxhall Omega for a Lexus GS 450h hybrid and Liberal Democrat leader Menzies Campbell has given up his beloved 20-year-old Jaguar.

But a Government-backed report commissioned by the Department for Transport and produced by the University College London Bartlet School of Planning and the Halcrow Group has concluded that technological advances alone are unlikely to take place in time to prevent the atmosphere becoming irreversibly damaged within the next 15 years. The study's co-author Professor Banister said emission-based national road-pricing is necessary along with a reduction in long distance travel, "heavy government investment" in cycling paths and walking routes and radical urban planning to improve access to local services and facilities.⁶

"This research shows that we can make huge cuts in transport's contribution to climate change if the Government puts the right policies in place,"⁷ said Tony Bosworth, Transport Campaign Manager at Friends of the Earth.

Biofuels made from crops are also making inroads in the drive for greener motoring. A clutch of cars are already capable of using it and former Transport Secretary Alistair Darling announced in November 2005 that 5% of all fuel sold at pumps must come from a renewable source by 2010.

"Taking action to tackle climate change is essential. The Renewable Transport Fuels Obligation I am proposing today is predicted to save around one million tonnes of carbon dioxide emissions in 2010 – the equivalent of taking one million cars off the road. This will help reduce the impact of transport on climate change, and bring environmental benefits for us all."⁸

Fiscal incentives: Leading the way or lost in translation?

Graduated vehicle excise duty and company car taxes based on carbon dioxide emissions are two of the tools used by the Government to encourage motorists to buy greener cars. Grants to LPG liquefied petroleum gas cars were a carrot to convert to alternative fuel and an exemption from congestion charges for hybrid and electric vehicles provides another incentive to go green.

But the Government's package of measures has not gone without criticism. Most recently, Chancellor Gordon Brown attracted criticism for introducing a zero Vehicle Excise Duty (VED) rate for cars that emit less than 100 grams of CO₂ per kilometre and a £210 (£215 for diesels) rate on thirsty gas guzzlers dubbed a '4x4 tax.' Opponents pointed out that only one hybrid car that is no longer on sale – the Honda Insight – met the strict requirement that excludes hybrids currently available in the UK including the Toyota Prius and Honda Civic IMA. At the other end of the scale, Mondeo Man – the mythical voter credited for sweeping Tony Blair to victory in the 1997 General Election – is caught in the net that places several popular family models like the 2.4-litre Honda Accord estate in the top bracket.

The cutting of Government grants through the Powershift scheme to motorists who converted to LPG also sparked outrage in the motor industry. The Society of Motor Manufacturers and Traders claimed the scheme's withdrawal "created uncertainty for manufacturers and consumers." Sales of new petrol-gas cars plummeted as a result – down from 3,185 in 2003 to just 489 in 2005.⁹

The Green cars showroom: on sale now...and around the corner

Hybrid vehicle technology, which couples the internal combustion engine with an electric motor, is already available in Honda's Civic IMA which has a CO₂ rating of 109g/km. Toyota's Prius saloon has an official figure of 104g/km and the Japanese firm's luxury brand Lexus has also introduced the

⁵ Department for Transport. The Future of Transport (White Paper). July 2004

⁶ Press Association News File. Section: Home News. Urgent need for travel shake-up. 27 January 2006

⁷ Press Association News File. Section: Home News. Urgent need for travel shake-up. 27 January 2006

⁸ Department for Transport. News release – Darling takes action to make transport fuels greener. 10 November 2005

⁹ Society of Motor Manufacturers and Traders. News release – Motor industry initial response to Budget. 22 March 2006

RX400h hybrid with a 192g/km return. It is said that, in cities, hybrid vehicles could deliver fuel economy improvements in excess of 50%.¹⁰

Biofuel – a mixture of bioethanol and petrol – is a newer currently-available option that could reduce transport CO₂ emissions by 50% compared to 2000 levels by 2035.¹¹ Cars can run on blends of 5% biofuel and 95% petrol but drivers will notice little change because the new fuel has no apparent effect on performance. However, newer models are coming on stream, including Saab's 9-5 BioPower that can run on a more concentrated mix known as E85 because it contains 85% bioethanol.

Hydrogen is the Holy Grail that could theoretically herald cars with zero CO₂ emissions by tapping an almost limitless resource. But storage of the volatile fuel, whether liquid or compressed, has yet to be addressed satisfactorily and there are big question marks over the emission of CO₂ during its production.

**John Grimshaw, Chief Executive
Sustrans**

At the heart of things we need to make it easier and more desirable to walk and to cycle.

Our Sustrans schools programmes encourage people to walk and cycle to school. Often it is the parents who want to drive their children to school, but it is not necessarily what the children would like. All our surveys show that 45% of children want to cycle to school on their own. They want to be independent. They want to be with their friends.

Obesity is rising amongst children in Britain and if you look at international data there is a direct correlation between obese children and the amount they cycle, or rather lack of cycling.

There is plenty of research to show that if you cycle to work you are fitter and more productive. Employers should be interested in having a productive fit work force.

Fuel cells that convert chemical energy from fuels including hydrogen and methanol are another far-reaching innovation that has focused the attention of automotive engineers. But the technology is expensive and has a long way to go before private passenger vehicles become affordable.

Emissions evasion: Consumers off course

Department for Transport research¹² indicates that 83% of car buyers are concerned about the environment – 34% of them “very” concerned. A preoccupation with price however, means 82% of them failed to check their car's carbon dioxide emission rating before purchase. Just one in 25 (4%) bought one with an engine of less than one litre cubic capacity. The majority (59%) opted for between 1300cc and two litres but more than one in six (16%) plumped for thirsty motors with engines over two litres. Hardly surprising, then, that the hybrid market accounted for just 0.24% of total UK car sales in 2005 when 2.4 million cars left showrooms.

Windscreen sticker price was the key consideration for 27% and 26% said fuel consumption was a big factor but just 3% professed that emissions had a significant effect on their purchasing decision.¹³

Motorists find that despite their good intentions and rising awareness of emissions, they are unable to make informed decisions. EU energy labels are widespread on domestic appliances and referred to by consumers buying fridges or washing machines. Whilst such a labelling scheme does exist for cars – colour-coded A-G labels showing fuel economy and CO₂ emissions – it is not widespread enough. An overwhelming majority admitted no knowledge of their car's emissions level before purchasing, but half (50%) now say that they will check before they buy their next one.

When asked who is responsible for protecting the environment from CO₂ car emissions, just one in ten (10%) accepted it was their sole liability to make sure they chose greener vehicles.

A third (33%) blamed manufacturers and 43% said the onus rested solely on the shoulders of the Government.

¹⁰ UK Petroleum Industry Association Future Road Fuels. June 2004

¹¹ Department for Transport. Liquid biofuels and Renewable Hydrogen to 2050. August 2004

¹² MORI research on behalf of the Department for Transport. Assessing the Impact of Graduated Vehicle Excise Duty: Quantitative Report. June 2003

¹³ MORI research on behalf of the Department for Transport. Assessing the Impact of Graduated Vehicle Excise Duty: Quantitative Report. June 2003



“If I would save money I would go to the green pump – if it was more expensive, we would need to see everyone start doing it,” said one of our focus group respondents. “We can do our bit with recycling, but there is not very much we can do with cars,” said another. “It’s a drop in the ocean what we do – aviation fuel and cheap flights create a bigger problem,” added a third.

Following the crowd: I will if you do

The results of the 2006 Report On Motoring also suggest a greater recognition of the greener options available. Nearly half (45%) believe they can, as motorists, reduce the impact of their car travel on the environment compared to a third (33%) who consider it futile to even attempt to change.

But 43% will not change direction until a lot more motorists are seen to take account of environmental concerns. Men are more likely to ‘wait and see’ than female motorists – 46% and 38% respectively agree that sitting on the fence is the prudent course of action. Company car drivers

are amongst the most non-committal with 34% taking no position on whether the environment is an issue that they will take on board. Perhaps they are mindful of the frequency with which company tax rules change and well aware of the pitfalls of plumping for the latest green fuel that leads them up an ecological cul-de-sac when another comes along tomorrow.

For most, cost considerations remain the most crucial issue. Indeed, 43% confessed that they would only become greener when the financial benefits outweigh any additional costs. Motorists in Scotland and Yorkshire & Humberside were amongst the least likely to change colour – 18% and 22% respectively agreed strongly on the need for more incentives.

Better fuel economy might be the most highly-prized benefit for motorists but lower emissions also commands widespread support. Four out of five say a 10% improvement in miles per gallon returns is the most important motivator in their choice of fuel but 72% also want less tailpipe pollution. Respondents in the AB socio-economic group are the most likely to consider the environmentally-friendly fuel option – 51% are ‘very likely’ to switch compared to just 34% amongst respondents in the less affluent DE group. Regionally, the majority of Welsh (60%) and Londoners (52%) consider themselves ripe for conversion to green fuels. In contrast, respondents in the South East (29%) and West Midlands (27%) displayed the lowest levels of interest.

Arguably, the most effective litmus test of our true commitment to going green is the price we are

Figure 11 Likelihood of changing behaviour

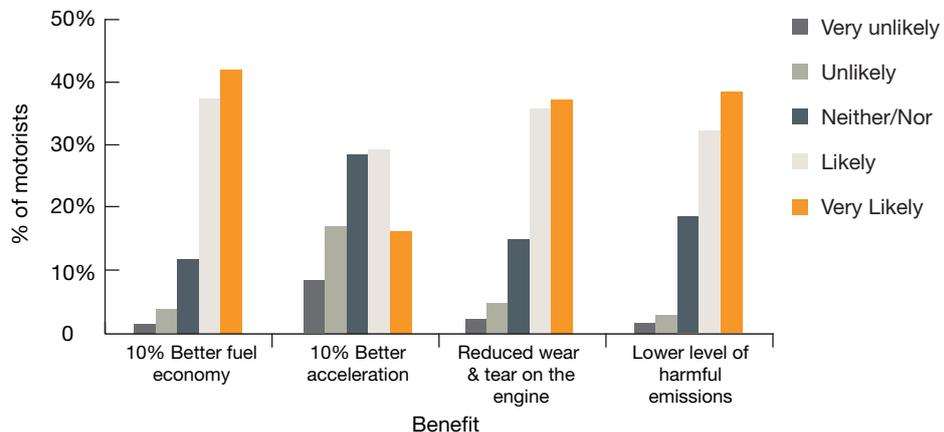
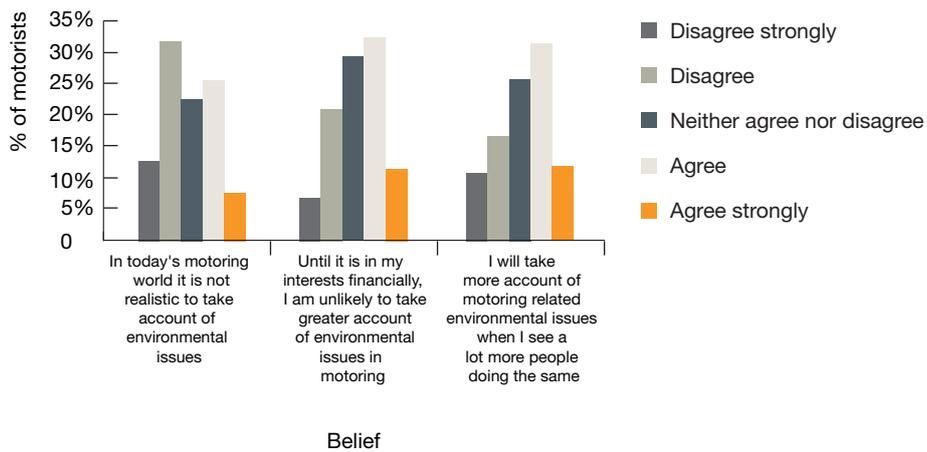


Figure 12 Attitudes to greener motoring



prepared to pay to earn environmental credibility. In order to determine the value that respondents attach to each benefit, we invited them to tell us the maximum that they would pay for a fuel delivering each of four advantages. It is most relevant to look at these perceived prices as relative values rather than absolutes so the table below expresses them in an indexed form.

	Index
10% Better fuel economy	100
10% Better acceleration	93.1
Reduced wear & tear on the engine	98.9
Lower level of harmful emissions	98.7

Three out of the four benefits achieve broadly similar values but better fuel economy is still the most motivating force. Only 10% better acceleration receives a lower value, suggesting that drivers are prepared to pay more for higher mpg, lower emissions and reduced wear and tear than they are for increased performance.

Our research indicates that drivers are full of contradictions but have a deep-seated desire to 'do the right thing.' Britain's motorists plainly wish to preserve their environment but need encouragement – both fiscal and educational – from the Government. That is, after all, what

inspired an explosion in demand for diesel company cars when reductions in tax were offered on engines that met the latest Euro IV emissions standards.

This point is not lost on SMMT chief executive Christopher Macgowan who says: "Buyers need incentives to drive the market for cleaner new cars. New technology, better consumer information and taxation also have a role to play but punitive taxes alone are not the solution."¹⁴

Other surveys have suggested that drivers are already using their cars less due to higher fuel prices. The £1 litre may, indeed, be the psychological tipping point at which more start to seriously consider trading in for a greener model. There exists the opportunity, therefore, for manufacturers to capture their imagination with a range of inspirational showroom models and for Government to provide clear incentives to ensure that buying a greener car becomes routine rather than remarkable.

Conclusion

It is important to inform motorists of the more environmentally friendly options such as the green labelling of new cars in the showroom and changes to the Vehicle Excise Duty. However, steps taken thus far are not working, as the

¹⁴ Society of Motor Manufacturers and Traders. News release – More carrot, not just the stick, motor industry tells government. 27 February 2006



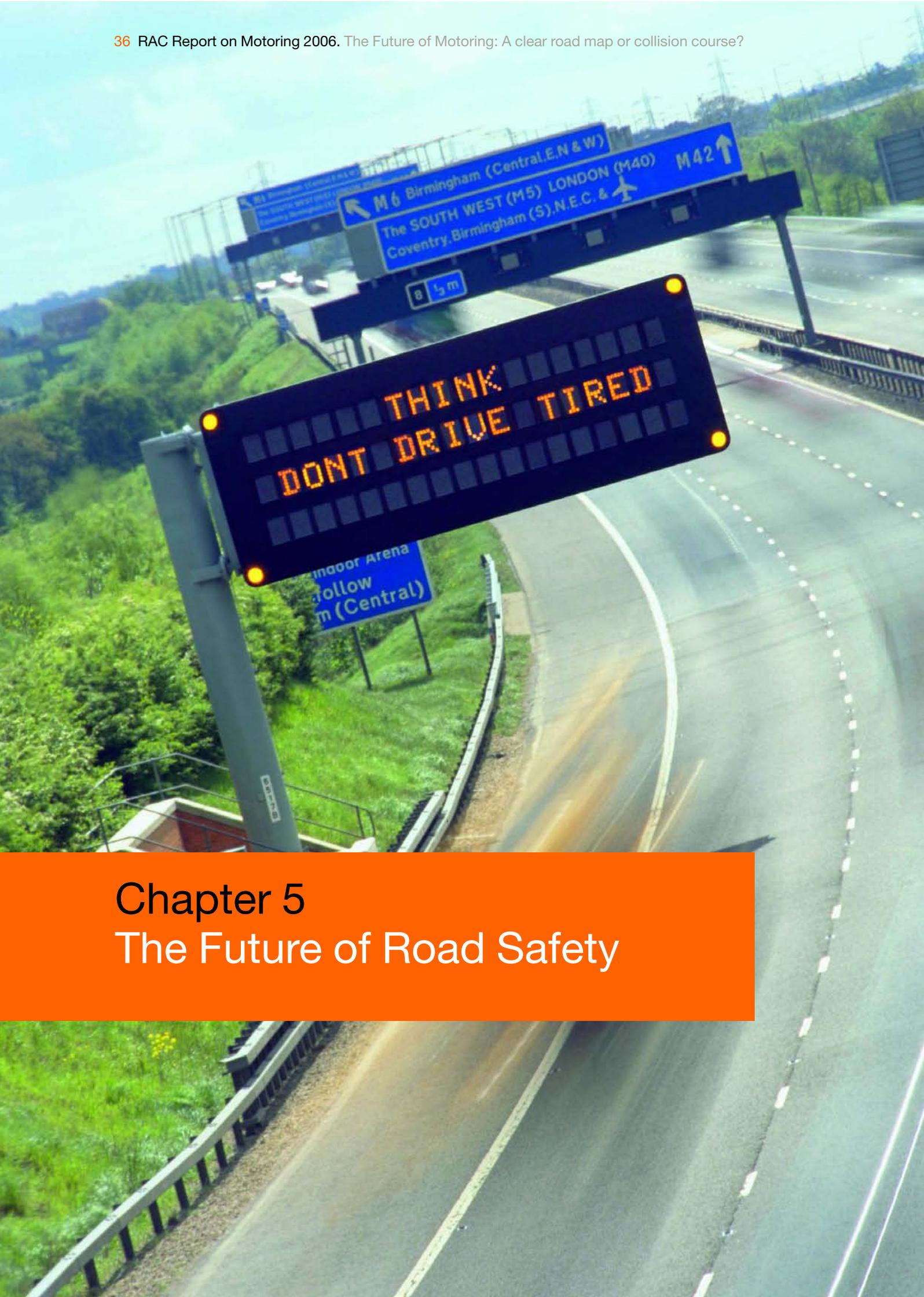
environmental credentials of a car are low on the list of decision-making criteria when purchasing a new vehicle.

Although it is encouraging that UK motorists do recognise the environmental impacts of car use and options available to them, many will not switch to more environmentally friendly vehicles until others go green or until they see the financial benefits, or indeed disbenefits, for themselves.

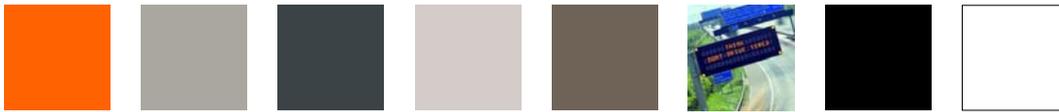
We are nowhere near the tipping point on the take-up of greener vehicles and the Government needs to review its approach on greener motoring and provide improved incentives either on purchasing new cars or perhaps the scrapping of older, more polluting and less fuel-efficient vehicles. Government may also want to consider extending the emissions banding and fuel consumption label system from new vehicles to the second hand car market. Whatever incentives are introduced, they must be long-term rather than constantly moving goalposts.

Hybrid vehicles are inherently more expensive to produce than conventional vehicles and are unlikely to be economically attractive to the public unless government taxation policy offsets the greater inherent cost of the hybrid. Furthermore, current hybrid vehicles on the market do not fall within the lowest band of Vehicle Excise Duty rates (based on CO₂ emissions), which perhaps creates further confusion.

However, it is not just the actual vehicle driven, which has potential environmental impacts, but also the way it is driven. Raising awareness plus more education and training on fuel efficient driving in terms of driver behaviour and vehicle maintenance can also play a part in reducing environmental impacts.



Chapter 5 The Future of Road Safety



Driver diagnosis: Compliance or culpability?

The vast majority of British motorists (84%) consider themselves to be safe, law-abiding drivers. This is despite the frank admissions of many respondents that they speed prevalently, drink-drive occasionally and blatantly disregard the rules of the road when they think they can get away with it.

Yet a significant percentage realise that a harsh clampdown is necessary on the very same motoring misdemeanours that they, themselves, confess to committing on an alarmingly regular basis. They may only stray over the line when the chances of getting caught are slim but many appear to welcome stronger deterrents for the worst offenders.

Their favoured curbs include compulsory dashboard alcolocks that force drivers to take a breath test before their car will start. These are supported by a massive majority (81%). Such an innovation is already taking root on the continent. The Swedish Parliament is drafting legislation to make alcolocks obligatory in all new trucks and buses from 2010 and in new cars from 2012. The Swedish Government is also considering fitting alcolocks in all its vehicles by 2010.

Speed limiters that prevent cars from exceeding the limit are also welcomed by almost half of respondents (49%). The same number (49%) back speed cameras capable of identifying the driver. They believe, no doubt, that there should be no escape by pleading ignorance about who was at the wheel and back a crackdown on 'points swapping' by innocent spouses who take the blame to prevent their partner getting banned.

Even traffic calming – a measure many regard as a frustrating misnomer – gets the vote of more than half (53%) who want to reduce accidents by putting a brake on speeding drivers.

Perhaps not surprisingly, drink-driving is the biggest 'Bogey Man' for our representative sample with 89% naming it as one of their top three concerns. But drug-driving is the current issue that attracts the biggest support for intervention and there is almost unanimous approval (88%) for roadside testing by police equipped with breathalyser style electronic devices that analyse saliva samples for traces of illicit substances.

British drivers: Law-abiding or lawless?

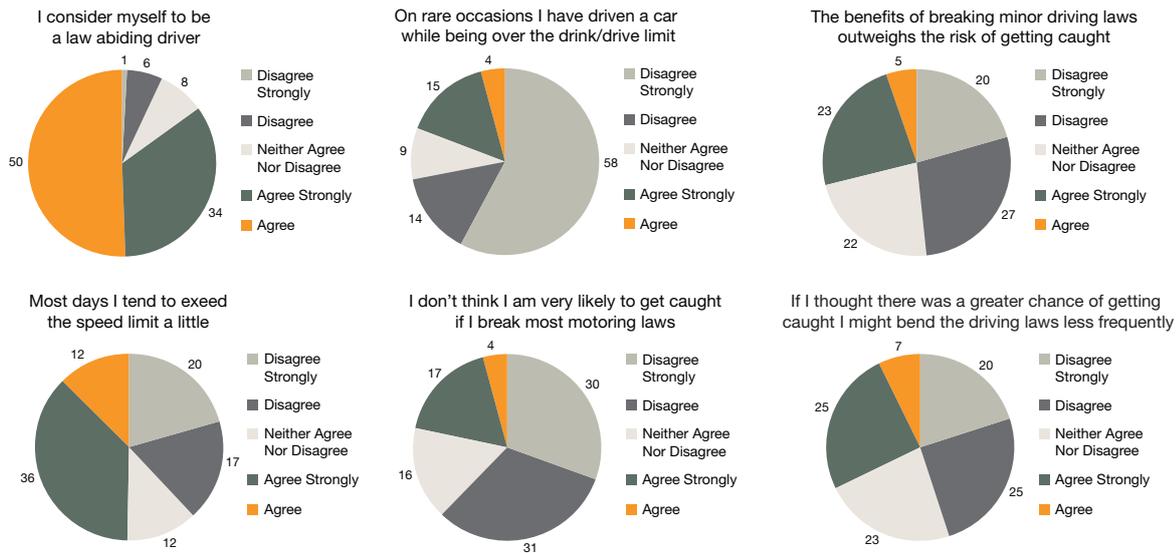
The bulk of motorists may profess to responsibility at the wheel but only half are fervent in their proclamation of compliance with the Highway Code. By their own admission, young motorists and company car drivers are amongst the worst offenders – just 30% and 34% respectively strongly agree that they are law-abiding.

Younger drivers in particular, exhibit worrying tendencies to disregard the rules of the road. Last year's RAC Report on Motoring highlighted a particular group of drivers – the 'console kings' – whose characteristics set them apart as the most demonstrative, rebellious and dangerous group of all. Typically these drivers were aged under 34 and male.

In 2004, up to 26% of death by dangerous driving convictions were accounted for by drivers aged 20 and under, despite this age group accounting for just 2% of licence holders.¹

¹ Home Office Statistical Bulletin 05/06. Motoring Offences and Breath Tests, England and Wales 2004. March 2006

Figure 11 Law-abiding or lawless?



BSM – the country’s largest driver training school – is focused on ensuring that young drivers take to the roads in a responsible manner. Learning does not stop when learners pass their test and further training via the “Pass Plus” scheme – of which BSM is a provider – helps people to become safer drivers. This scheme provides additional training to recently qualified drivers, which can lead to discounted insurance premiums.

Speeding is the most commonly committed offence – only around a third (37%) of people don’t break the limit on a daily basis. This finding supports Department for Transport data on traffic speeds² that suggests speeding is endemic.

Even the use of a phone whilst driving is prevalent, according to last year’s RAC Report on Motoring which revealed that more than two-thirds (68%) witness drivers using a hand-held mobile at the wheel most weeks.

Particularly alarming, though, is the candid confession this year by almost one in five (19%) who say they occasionally get behind the wheel after consuming sufficient alcohol to put them over the legal limit. Drivers of company and luxury cars are most blameworthy – an alarming 32% of each admit to falling off the wagon on “rare occasions.” Those that cover more than 13,000 miles a year are

next most likely to stray (30%) – even more frequently than 17-19-year-olds (26%) who many suspect of being the worst offenders.

The extent of drug-driving is revealed by research that found a three-fold increase in those who die with a cocktail of illegal stimulants in their system. The Transport Research Laboratory (TRL) found that 17.7% of casualties tested positive for multiple drug use in 2000 compared to just 5.3% in the three years between 1985 and 1987.³ Cannabis was the most commonly detected substance and was linked to 11.9% of deaths compared to 2.6% previously. Overall, almost a quarter (24.1%) of those killed had taken medicinal or illicit drugs. The under-40s showed the strongest inclination to dabble in a ‘recreational’ habit – 75.3% of the illicit users were in this age bracket – and a larger proportion of male fatalities (9.3%) tested positive for cannabis than females (2.9%).

In 2004, 90,300 persons were disqualified from driving after consuming alcohol or taking drugs – a rise of 3,300 from 2003. 42% of disqualifications in 2004 were for more than one year, including 69% of disqualifications for driving after consuming alcohol or taking drugs. The proportion disqualified for this offence has steadily increased from 59% in 1996.⁴

² Department for Transport. Vehicle Speeds in Great Britain: 2005. April 2006

³ TRL Ltd. TRL Report 495 – The incidence of drugs and alcohol in road accidents fatalities. 2001

⁴ Home Office Statistical Bulletin. Motoring Offences and Breath Test statistics 05/06 England and Wales. March 2006



The same Home Office figures also show that between 1998-2000, the number of people killed or seriously injured in accidents involving illegal alcohol levels remained steady at around 3,000 but rose by 5% in 2001 to 3,230 and then again increased by 3% in 2002 to 3,340. In 2003 there was a decrease of 5% to 3,170 and provisional estimates for 2004 suggest a further decrease of 7% to 2,940. The reduction over the last couple of years has been in the serious casualties only. Fatalities have continued to rise.

Last year's RAC Report on Motoring revealed that an increasing number of motorists committed offences safe in the knowledge that they wouldn't be caught – effectively 'driving under the radar'. Detection is obviously an issue.

Given this, the recent decrease in numbers of traffic police gives cause for concern. One in five motorists (21%) are under the impression that they are virtually immune from prosecution and a sizeable minority (28%) believe that breaking the law is worth the risks.

Highway hazards: The driver's eye view

As stated earlier, drink-driving is by far the biggest road safety priority for an overwhelming proportion of Britain's drivers and 50% say it is their number

one concern. Ironically, this sentiment was particularly high amongst company car drivers (57%) who are the most likely to drive under the influence of alcohol.

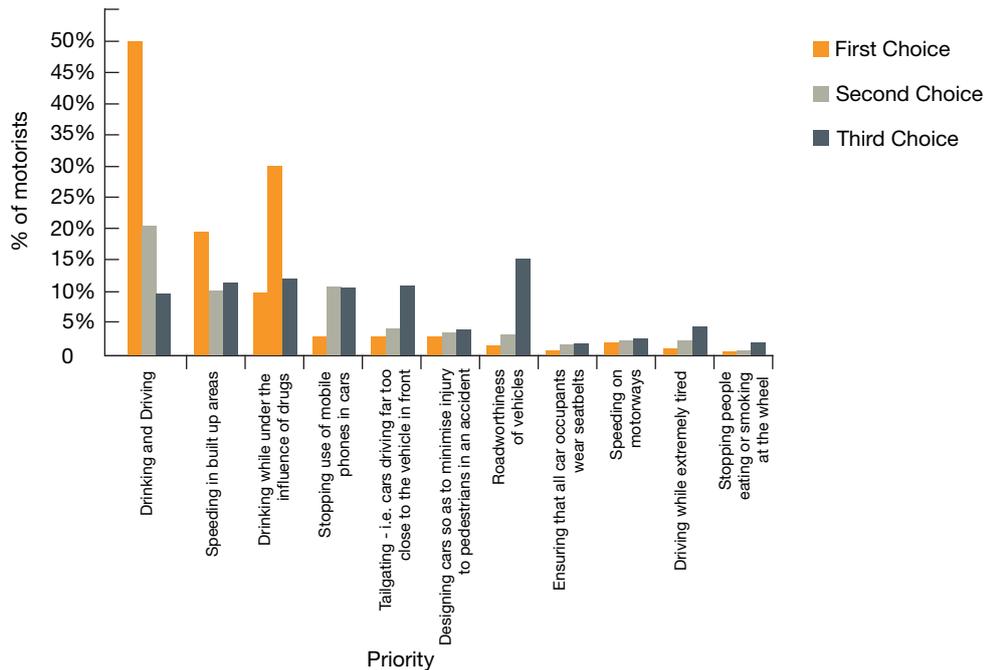
Drug-driving was the second most concerning matter with 55% naming it as one of the top three road safety subjects to be addressed by the authorities. The issue was highest on the agenda for Londoners where – 16% named it as the top priority compared to 9% nationally.

It is also clear that speeding in built up areas is a high priority – 41% of all respondents making this issue one of their top three choices eclipsing fears about mobile phone use, unroadworthy cars and tailgating.

Even seatbelts and driving whilst tired – both the subject of extensive public awareness campaigns – failed to make an impact as problems to be tackled. Perhaps drivers believe these issues have already been addressed and are no longer a top priority.

The perceived threat from other drivers also appears quite high with 70% of motorists believing that most drivers are far too aggressive whilst 76% are now really concerned about the number of

Figure 12 Road safety priorities



uninsured drivers on the road. It would appear that these law-abiding, insured motorists are not wrong to view uninsured motorists as a big concern. The Association of British Insurers (ABI) has estimated that one in 20 UK motorists drive without insurance and that uninsured drivers are involved in about 50,000 claims a year.⁴

Furthermore, the same research by the ABI found that 73% of uninsured drivers believe they drive carefully and within the law, while six in 10 say they have not got insurance because they do not think they will crash. However, the ABI's study showed uninsured drivers are three times more likely to have been convicted for driving without due care and attention and 10 times more likely to have a conviction for drink driving. If nothing else, this goes some way to confirming the suspicions of all those driving on the right side of the law.

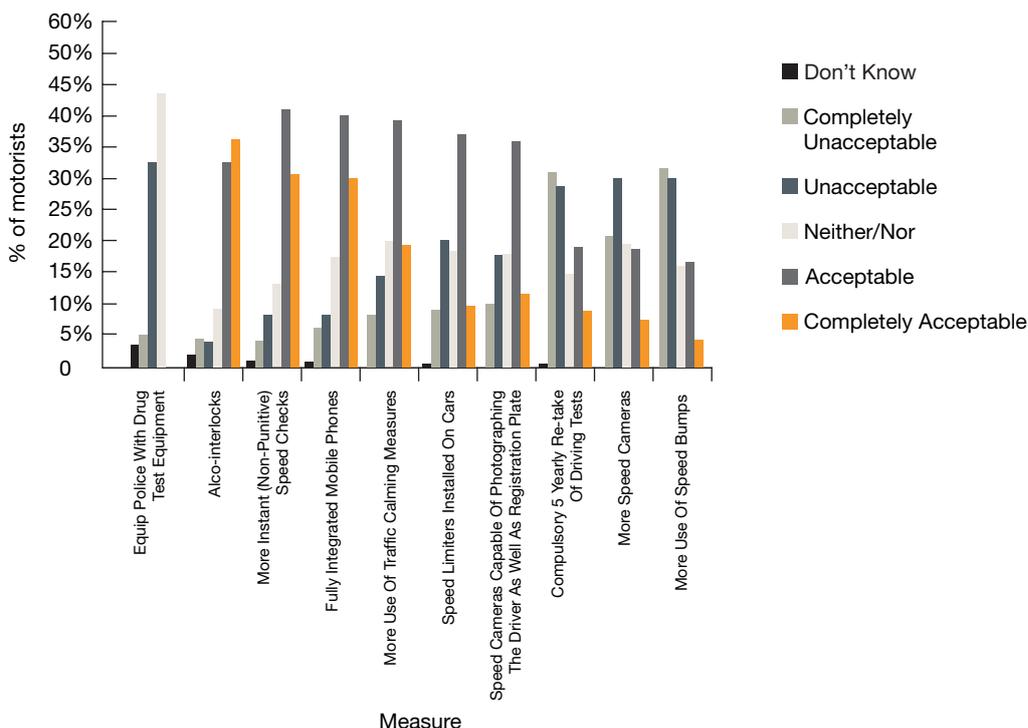
This is a view endorsed by Minister of State for Transport, Dr Stephen Ladyman, who has stated "uninsured drivers should ultimately see their vehicles going into the crusher and our only debate should be whether the drivers should be in them at the time".⁵

Remedial action

Roadside drug testing attracts the biggest support from Britain's motorists. In fact, only a tiny minority (6%) regard it as an unacceptable intrusion. Furthermore, 84% believe hand-held electronic equipment currently being trialled by the police would be an effective tool in clamping down on the menace of drivers high on drugs. This implies an awareness that a third of drug-induced drivers can easily pass an old-fashioned sobriety test currently used by officers to assess whether a suspect is under the influence of an illicit substance.⁶ This consists of five different dexterity tests including standing on one foot, walking in a straight line and placing a finger on the end of the nose. Drivers who fail must provide a blood sample for analysis. The current test is not scientifically reliable and more work needs to be done to develop a more robust testing procedure.

Support was also strong for vehicle activated speed signs. A big majority (70%) are in favour of these non-punitive checks – almost three times the number (25%) that back additional speed cameras. Similar proportions take the view that Gatso speed cameras are more of a tax on

Figure 13 Acceptability of road safety measures



⁴ Association of British Insurers. News release – Motorists back clampdown on uninsured driving announced today. 2 December 2004

⁵ Dr Stephen Ladyman MP, Minister of State for Transport. Standing Committee A. Road Safety Bill. 28 March 2006

⁶ University of Glasgow for the Department for Transport. Road Safety Research Report No 63 – Monitoring the Effectiveness of UK Field Impairment Tests. March 2006



motorists (69%) than a road safety tool (22%). Vehicle activated signs, on the other hand, are seen by most (66%) as an effective weapon in the road safety armoury. This reflects the findings of a Transport Research Laboratory study for the Department for Transport⁷ that found they are “very effective” in cutting speeds and produce a “substantial accident reduction.”

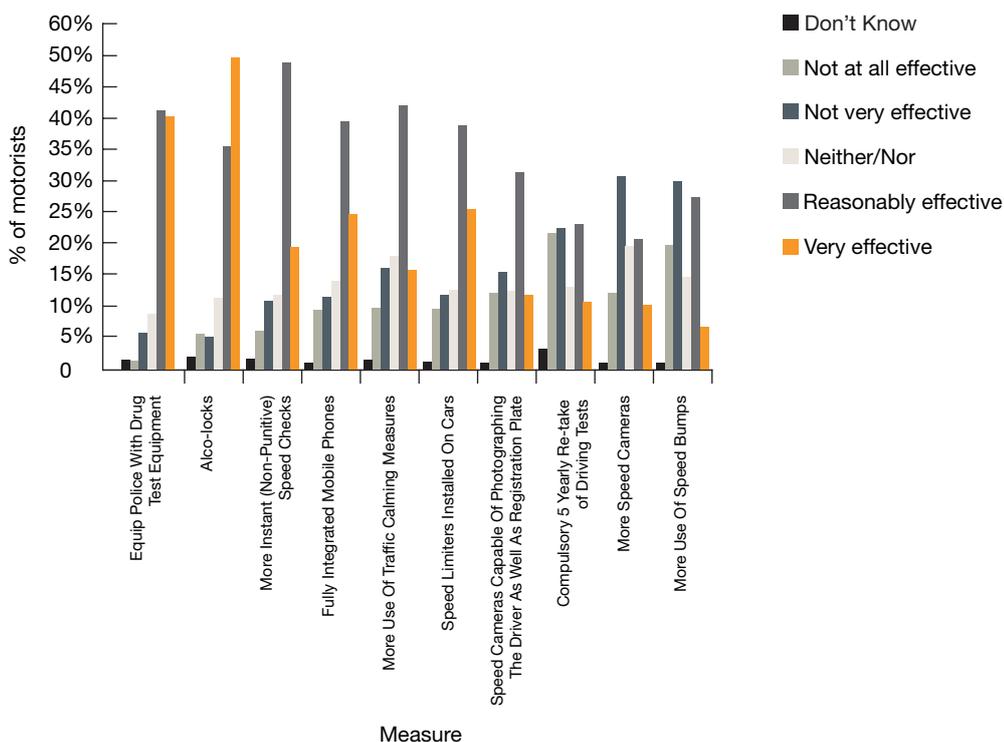
The Government, however, insists that speed camera’s effectiveness in reducing casualties supports their use. Dr Stephen Ladyman, claimed a 70% fall in the proportion of vehicles exceeding the speed limit at fixed camera sites, resulting in a 22% drop in personal injury collisions and a 42% fall in the number killed or seriously injured.⁸ But fewer than a third of motorists (32%) are convinced of this argument presented in a four-year review of Gatso speed traps.

On the other hand, cameras that identify speeding drivers are regarded as effective by a majority (51%).

Speed limiters (62%) and traffic calming (57%) are also seen as a success story – despite a lack of faith in speed humps on ‘rat runs’ that are despised as the least fruitful road safety measure (32%) and are unacceptable to 62%. Perhaps the development of ‘intelligent’ bumps that flatten for emergency vehicles and cars travelling within the speed limit may change attitudes towards the ubiquitous ‘sleeping policeman’ that has entered British folklore as an object of aversion.

The results suggest that, once again, the British motorist may not speak with one voice. But they do imply that most motorists believe that they only bend the rules rather than drive a coach and horses through them. They also suggest broad support for a clampdown on the worst offenders. It might be alright to put your foot down on a clear motorway but speeding past a school is evidently frowned upon. Similarly, they obviously regard drink-driving as a major issue even though they, themselves, are sometimes to blame. Perhaps their overwhelming support of alcolocks infers that they would welcome a way of putting a stop to this behaviour before they end up in court. Backing for

Figure 14 Effectiveness of road safety measures



⁷ TRL Ltd. TRL Report 548 – Vehicle-activated signs – a large scale evaluation. 2003

⁸ Dr Stephen Ladyman MP, Minister of State for Transport. ROSPA conference – Road to safer behaviour. 27 February 2006

**Rob Gifford, Executive Director
Parliamentary Advisory Council for
Transport Safety**

No doubt over the last 2 years there has been high media debate about effectiveness of speed cameras. The trouble is we have debated the issue of speeding as if cameras are the only thing we can do when actually there are other measures.

I think we have to get away from the focus on the speed camera. We actually have to talk about managing speed more generally with traffic police officers, vehicle activated signs and better information playing an equal part alongside the usage of speed cameras.

roadside drug drive tests is, perhaps, indicative of a wider recognition that the problem appears to be getting worse.

These research findings provide a clear indication for the Government about those measures that are most likely to win motorists round in the continuing bid to make Britain's roads even safer. On the other hand, they also suggest a bumpy road ahead should policymakers attempt to force through unpopular innovations.

Conclusion

Driver education, appropriate penalties, fair enforcement and a visible deterrent in traffic police are key to making our roads safer.

RAC supports the measures contained in the Road Safety Bill, including proposals to make it an offence to own and use a vehicle without adequate insurance and the criminal offence of death by careless driving. Both measures should act as further deterrents to uninsured driving.

Worryingly, today's motorists think they are safe and law abiding despite their willingness to ignore the rules of the road including drinking and driving. However, despite this, there is strong support for the Government taking greater punitive action against drink and drug drivers and for non-punitive speed camera checks. Motorists are clearly concerned about the number of uninsured drivers on the road both from a safety perspective and the fact that £30 of their annual premium pays for these drivers.

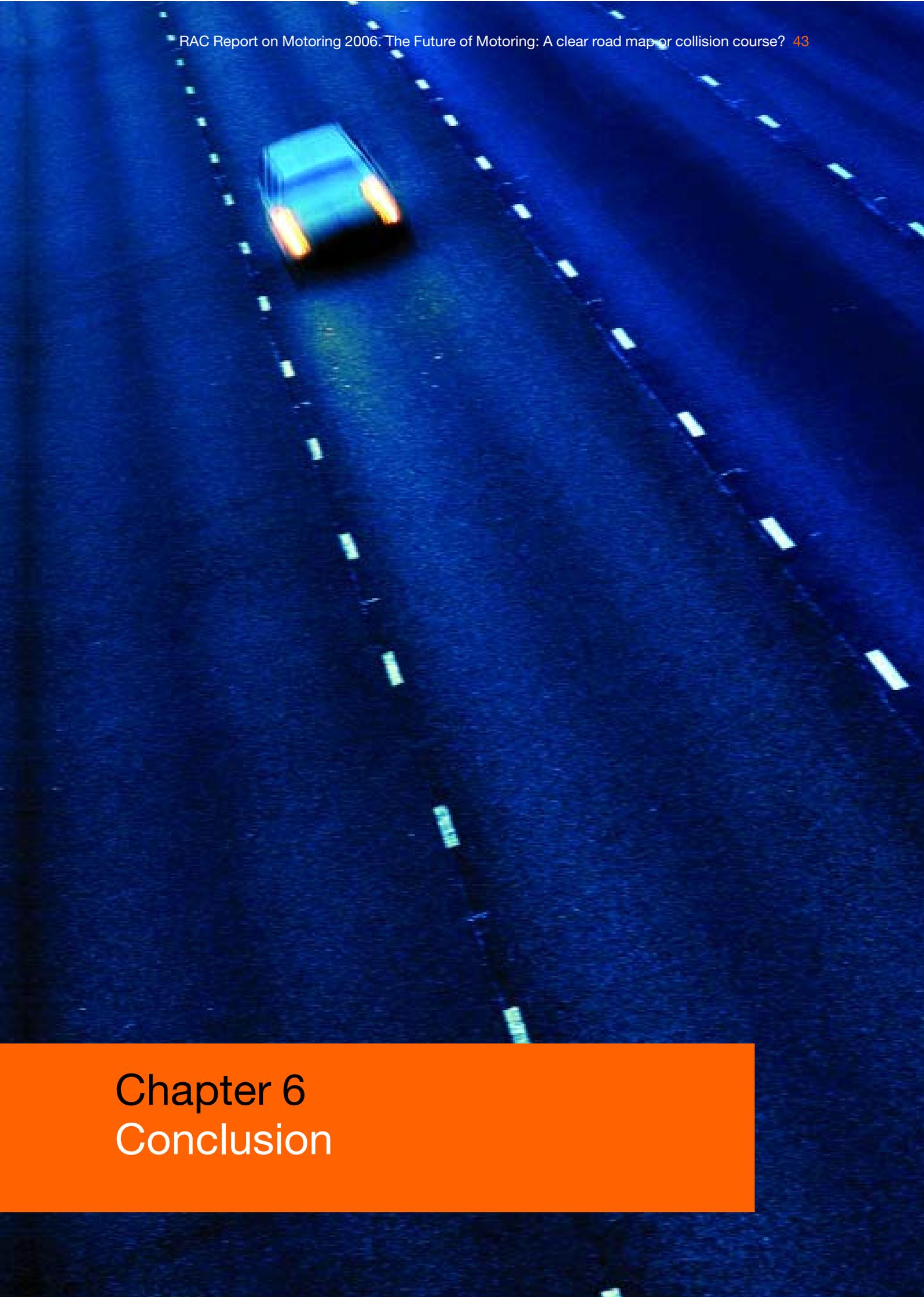
Driving under the influence of alcohol is a long-standing and well-documented problem. RAC believes drug driving could be as prevalent and dangerous as drink driving. Both are high in the public consciousness. To help address these problems, RAC would like to see the early adoption of alcolocks as is already being used by HGV drivers in Sweden. With regard to drug-testing, the current roadside 'Field Impairment Test' is not scientifically reliable and a more robust test needs to be developed.

Government has taken steps to tackle the problem of habitually uninsured drivers. We welcome the new offences contained in the Road Safety Bill, and the new powers that the police were granted last year to stop and confiscate vehicles without insurance, however the real challenge will be enforcement.

Education is a key contributor to changing behaviour. Speed cameras, for example, are still viewed by the motorist as an income stream and it is important to educate the public on their use and the contribution they make to road safety.

More information should also be provided to drivers. Instead of just receiving a notification in the post for a driving offence, offending motorists could 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.

We believe traffic police act as a visible deterrent to road safety issues such as careless driving and the use of a handheld mobile phone while driving. However, the introduction of Highways Agency Traffic officers and the transfer of network management responsibility to the Highways Agency have encouraged some Chief Constables to further reduce their investment in traffic policing. RAC believes there should be greater investment in more traffic policing on our roads to ensure that drivers breaking the law, are caught and prosecuted.

An aerial, high-angle photograph of a car driving on a multi-lane road at night. The car is positioned in the left lane, moving away from the viewer. The road is illuminated by streetlights, creating a blueish glow. White dashed lines mark the lanes. The overall scene is dark, with the car's headlights and taillights providing the primary light source.

Chapter 6 Conclusion

This year's Report on Motoring takes a look into the future and suggests that the Government doesn't have to be on a collision course with motorists on key transport issues.

All parties accept that there are already significant problems with congestion, road safety and the impact on the environment, which will only worsen unless radical steps are taken.

The British motorist faces a daily battle through a minefield of hold-ups, roadworks and parking restrictions that have taken the gloss from what should be an enjoyable experience. Long gone are the days when life on the open road was a pleasurable freedom. Despite their frustrations, motorists display an enduring love for their cars and a distinct lack of enthusiasm for the alternatives of public transport, cycling or walking.

Government announcements, academic studies and media reporting have fuelled speculation on national road pricing but to date, this has posed more questions than provided answers. It is essential that Government provides greater clarity on the objectives of road pricing and that a consistent approach – in terms of policy and technology – is developed at a national level rather than piecemeal projects on a local basis. Only when these have been clarified can we have a fully informed debate.

Policymakers have clearly stated that they want to gain public consensus on the road pricing debate and this 2006 RAC Report on Motoring shows that there is light at the end of the tunnel and a route forward. Despite attachment to their cars, a tipping point appears to have been reached and motorists have revealed that not only are they prepared to cut a deal with Government, but they have also laid down the terms of that deal.

For the deal to work not only will transport investment be needed, motorists will also require visibly improved public transport services, better workplace travel options and a financial trade-off on the motoring tax burden. The last point is perhaps not surprising as we are fast approaching an average £1 per litre of petrol.

Naturally, more needs to be done to reduce motorists' dependence on their car but an all or nothing approach isn't the solution. If viable public transport solutions aren't available within close proximity to home, motorists could be encouraged to use their car for only part of the journey and break up their journeys, if there is greater investment in car parking at railways and investing in park and ride schemes.

In-car technology and telematics have the potential to transform the future of motoring and pave the way for Government to launch nationwide road pricing. Yet, we believe public understanding and acceptance of the use of such technology is key to garnering support.

The Report demonstrates that many motorists aspire to have sophisticated in-car technology but this is not yet reflected in the penetration of in-car devices. Combining telematics technology with other driver-friendly services such as satellite navigation, vehicle tracking or an emergency panic



button would widen take-up beyond the “early adopters” and constitute useful bargaining chips for Government in encouraging the uptake of technology and with it, acceptance of road pricing.

RAC would urge Government to lead the debate on mandating in-car technology in all new vehicles and provide greater incentives for its use. In addition, clear standards must be developed to ensure such technology is compatible with that used for any road pricing scheme.

Green motoring is a growing concern for road users with increasing recognition of the environmental impact of running a car and the availability of less damaging alternatives. However, to change behaviour and improve the uptake of green motoring, Government and manufacturers must understand the priorities of UK motorists – top of the list for choosing a car is price. Many motorists will not switch to more environmentally friendly vehicles before others do so or until the financial benefits of doing so are clearer.

Government needs to review its approach on greener motoring and provide improved incentives either on car purchasing or perhaps the scrapping of older, more polluting and less fuel-efficient vehicles. Whatever incentives are introduced, they must be long-term rather than constantly moving goalposts.

Finally, road safety continues to be a source of great concern to road users, mirroring the concerns of Government. Motorists think they are generally law abiding and safe drivers despite their willingness to ignore the rules of the road. There is strong support for greater punitive action against drink and drug drivers and for non-punitive speed checks.

They are prepared to support a number of draconian measures in return for protection from other motorists and to discourage themselves from continuing to bend the rules.

RAC calls on the Government to consider the introduction of alcolocks 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. Government should increase its commitment to dealing with habitually uninsured drivers and greater numbers of traffic police are required on the roads to ensure such measures are enforced.

Enabling economic growth, improving road safety, managing congestion levels, reducing pollution: these are just some of the challenges for our road network and thus for motorists. This 2006 RAC Report on Motoring set out to investigate whether or not motorists were on a collision course with transport policy. The research findings clearly demonstrate this is not the case. The challenges ahead can be met with partnership working between Government, the private sector and road users. This Report starts preparing the debate for a road map of the future.

Appendix 1: Research Methodology

Basis of the research – RAC Report on Motoring 2006. A clear road map or collision course?, presents the analysis of qualitative survey conducted by MORPACE International Limited on behalf of RAC.

MORPACE International interviewed 1,000 regular drivers (defined as driving at least once a month) face to face at home during January and February 2006 in the UK.

Interlocking weighting factors have also been applied to reflect the gender and residential region of car drivers.

It should be noted that the title of this report is 'RAC Report on Motoring 2006: A clear road map or collision course?'. Up until 1999, the reports were 'The Lex Reports on Motoring' and from 2000 'The RAC Reports on Motoring'. Despite these name changes, consistent research methods were used throughout.

Statistical reliability

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown give an estimate within a small margin of error, of the actual figures.

The error margin varies with the sample size; the larger the sample is, the lower the error will be. It also varies with the actual proportion answering, so that the error is lower for a 90/10 result than it is for a 50/50 result. In order to illustrate the use of varying sample sizes and their 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.

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

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



Appendix 2: Acknowledgements.

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Company Overview

RAC provides a comprehensive range of motoring and vehicle services for both consumers and businesses. These range from those learning to drive with BSM, people who enjoy peace of mind with RAC breakdown cover and to customers utilising HPI for vehicle history checks. RAC is part of Aviva, the world's sixth-largest insurance group and the biggest in the UK where it operates under the Norwich Union brand.

The wide range of motoring services RAC provides include:

RAC Rescue

RAC Rescue, our roadside assistance service, has around 7 million roadside assistance customers – 2.2 million individual members and 4.5 million corporate customers. Our breakdown assistance centres operate 24 hours a day, seven days a week and handle around four million calls a year which, at peak times, can mean two calls every second. RAC has 1500 patrols that attend 2.5 million breakdowns each year. RAC Rescue also includes our overseas development of roadside and related products and services, through RAC Europe. Through a wide network of contractors and partners across continental Europe RAC provides breakdown assistance to members when they're abroad.

BSM

BSM is the the UK's largest driving school, with over 3,400 driving instructors. It is also one of the largest driving instructor training providers. BSM is fully committed to helping people become safer drivers, not just training them to pass their test. Every two minutes someone passes their driving test with BSM (calculated using 2005 pass rates and standard test centre opening hours).

RAC Auto Windscreens

RAC Auto Windscreens provides complete automotive glazing repair and replacement service (windscreens, rear windows and side windows) through 145 fitting centres throughout the UK – approximately 20% more than its competitors. Backed by a fleet of nearly 1000 fully equipped mobile fitting units, RAC Auto Windscreens provides a 24/7 national service for its private and corporate customers every year.

RAC Direct Insurance

RAC Direct Insurance uses its expert driving know how to help provide customers with a new way of looking after their motor insurance needs. When a customer calls for an insurance quote they are asked a series of simple driver profile questions, allowing RAC to offer further discounts and lower quotes. As well as providing motor insurance, RAC Direct Insurance also offers van, motorbike, home and travel insurance.

RAC Legal Services

RAC Legal Services provides expert advice and representation to customers involved in personal injury claims.



RAC Loans

Loans of up to £25,000 (typical 6.5% APR) are available for any purpose including buying a car, consolidation of other credit bills, home improvements, through to holidays. They are available to everyone, not just RAC members.

RAC Vehicle Checks and Examinations

RAC Vehicle Checks and Examinations help give customers peace of mind when buying a used car. The vehicle check will show whether the car has been stolen, written-off, has outstanding finance or previous plates, is at risk of being sold illegally, and that its number plate and chassis number correspond. RAC Vehicle Checks are powered by HPI. With RAC Examinations, qualified inspectors will conduct up to 166 physical checks on the car to make sure it is mechanically and structurally sound.

HPI

HPI provides the most comprehensive check on a car's status – assessing whether a car has been stolen, written-off, clocked, has outstanding finance or previous plates, is at risk of being sold illegally, and that its number plate and chassis number correspond. It will also check whether the car's documents are genuine and give a current market valuation. Though predominantly used by the motor trade, increasingly private customers are also using this premium service.

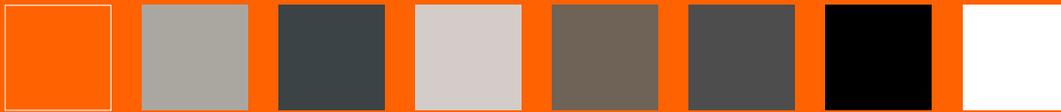
Travel and traffic information

RAC provides a range of travel and traffic services including online route planners, in-car navigation, up-to-date traffic information via phone or the internet and help with travel documents.

Team RAC

As the longest established motoring organisation, RAC is proud and excited to be sponsoring a professional race team in this year's Dunlop MSA British Touring Car Championship (BTCC). This represents a return of RAC to its motoring roots. Our history with BTCC links back to the original governing body and classic events such as RAC British Grand Prix, the RAC Rally and RAC London to Brighton Run.

Team RAC is managed on behalf of RAC by West Surrey Racing (WSR), a leading motorsport engineering company with ten years experience running Touring Cars. Under the sponsorship deal we will be entering the ten race events with two, RAC branded, WSR designed and built MG ZS cars.



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