

# RAC Report on Motoring 2010

The driver's perspective



# Foreword

## Sir Stirling Moss OBE



The RAC Report on Motoring 2010 provides a notable insight into the views of motorists and the continuing importance of the car in daily life...

As an 80 year old driver, both on the road, and I am happy to say still on the race track, the topic of elderly motorists is one that I can clearly relate to. The statistics show that although as a group we are less likely to be involved in an accident, we are more likely to be the cause of an accident whether we are caught up in it or not. A sign that our reaction times, eyesight, hearing, perception of speed and distance are not what they once used to be.

As such, I support the idea of tests for the elderly generation. Partly because so many things have changed since we first started driving: road signs have been altered and added to and the density of traffic has risen enormously, especially in the cities. We do not need to give this generation a full driving test again, however, perhaps just a simple competence test every three to five years from the age of 70, to make sure we are still capable.

In New Zealand, they insist on this kind of test every 10 years, no matter your age or ability. It is a good idea – as is the notion that doctors should certify people as safe to drive once they reach 70. This could bring a financial benefit to older drivers – if we as a generation are passed fit to drive by the means described, the levels of accidents within our age group should lessen, reducing the risk to insurers, which could keep premiums down.

The ever increasing cost of driving is a concern for any age group, let alone the elderly motorist.

Electric vehicles are cost effective in terms of the day to day running costs. There are, however, a number of areas that still need to be addressed to make this a truly viable form of alternative transport for the future. Not least of which is the cost of buying an electric vehicle that would replace your current fuel powered car, like for like in terms of performance, practicality and more importantly, range. Of course the technology is being developed, whether it is the weight of the batteries, the ability to hold a charge for longer or a greener way of manufacturing them.

It is also interesting to note that the behaviour of our fellow drivers on the roads is the number one issue at the forefront of motorists' minds this year. As someone who has been driving for over six decades, I have witnessed this particular issue become more prevalent.

The challenges then are for the older generation to show that they are competent to drive from a set age, for the automotive industry to make electric powered vehicles a truly viable form of transport and accessible in terms of price and for all motorists to have respect for each other on the road, thus improving the driving experience for everyone.

*Stirling Moss.*  
STIRLING MOSS

# RAC Report on Motoring

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# Executive summary

There are over 30 million motorists in Britain today\*. This Report provides a snapshot of their attitudes and behaviour in 2010 with regard to their vehicles, the road network, Government transport policy, and other drivers. It is based on research from a sample of 1,150 British motorists†.

There are a series of key findings in this year's Report which include:

The impression that motorists are becoming more inward-looking, as they disengage from national and global issues that are beyond their reach and focus on their local area issues and behaviours which they can control.

Despite increasing fuel costs, motorists have greater concern about the behaviour of other drivers than the cost of motoring; 97% were concerned about drunk or drugged drivers, 96% were concerned about mobile phone usage when driving, 95% were concerned about driving without tax or insurance.

A big increase in motorists breaking the law when it comes to mobile phone usage in their vehicles, with 28% using their mobile phone without a hands free kit, up from 8% last year, and 31% texting when driving, up from 11% last year.

The environment slipping even further down motorists' list of priorities, with 35% believing nothing they do will make a difference. Incentivising behaviour is effective, however, following the car scrappage scheme the average age of cars decreased to 5<sup>1</sup>/<sub>5</sub> years, a month younger than last year, and 74% say they would buy a more environmentally-friendly new car if the tax incentives were better.

The impact of the recession is being reflected in the cars motorists are driving, with fewer 4x4s, and luxury or sports cars on the road. There is a growing interest in electric vehicles, with more education needed on cost and range before they can become a viable mainstream option.

With the number of male drivers over 70 doubling and female drivers tripling over the next 20 years there is strong support for compulsory medical checks for motorists aged 70 and beyond from 69% of motorists, but opposition to measures that restrict their driving.

Motorists are aggrieved with the state of roads where they live. Some 88% of motorists think their local roads are getting noticeably worse, and 86% of motorists are sceptical that enough of their motoring taxes are reinvested into local roads.



\* Department for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)

† Further information about the research can be found in the Appendix on page 62



# RAC Story Booth: British motorists tell us what they think...

Spring 2010 saw the RAC Story Booth visit UK shopping centres to gather views and stories from British motorists. Here's a selection:



"Previously, people would stop to help you if you'd broken down. There's not the companionship on the roads any more."  
Brian Hedges



"I think there's some way to go before we can all afford shiny, new fuel efficient cars."  
Karen Partridge

"I love four wheels, I love two wheels and I enjoy the freedom of the open road. But it would also be nice to have a bus service, tram service, train service that I would feel confident using."  
Martin Smith



"The 'A' roads are terrible for potholes... by comparison, the roads in France are absolutely brilliant."  
David William Butler

"I'd like to see more parking facilities that don't cost the earth."  
Patricia Stone





# 1.0 Introduction

While the recession is technically over, money is still a concern for most people, and motorists are being hit harder and harder with increased taxes and steep hikes in the cost of fuel. >>





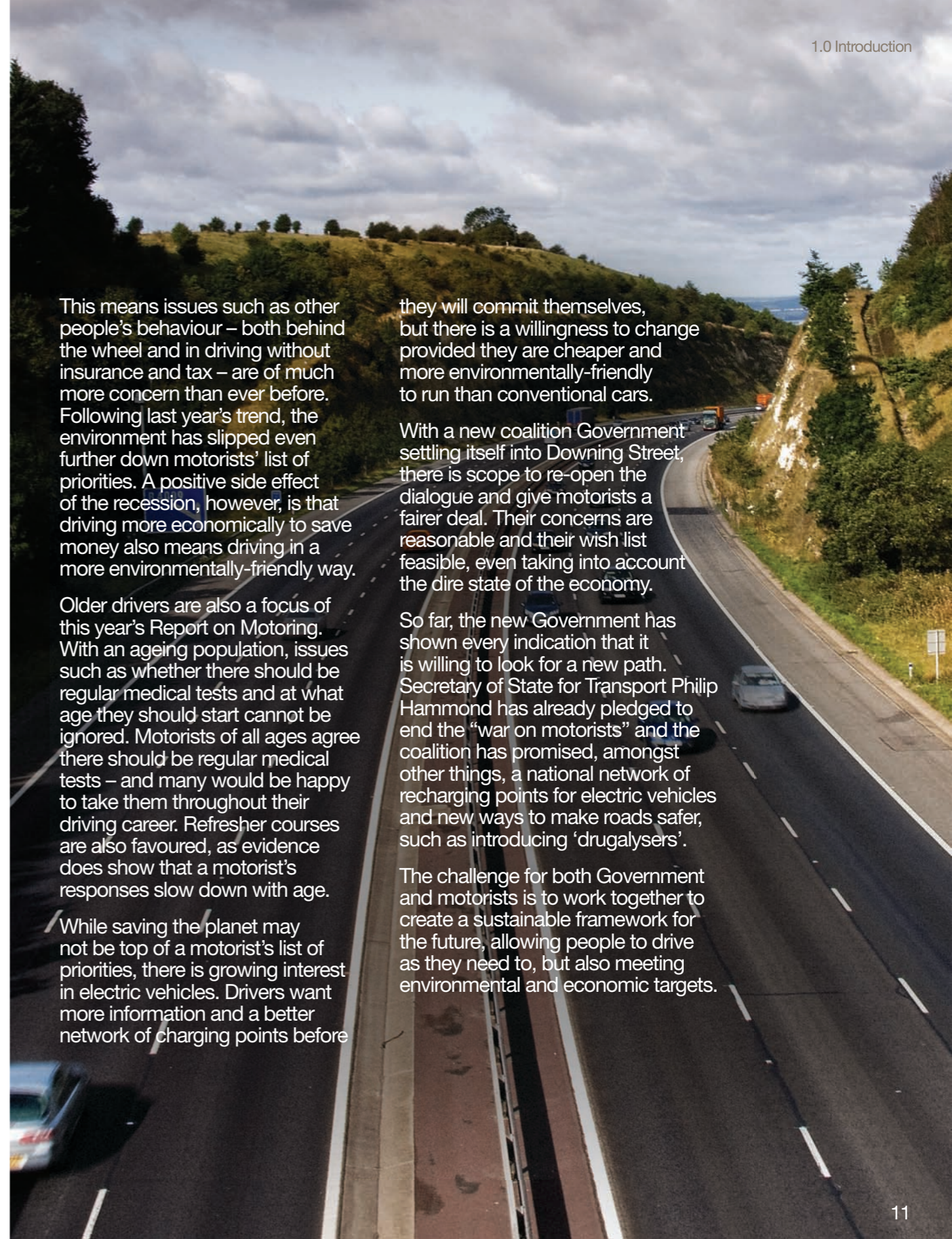
# 1.0 Introduction

Has motorists' behaviour changed?  
 Are they driving less and walking more?  
 Are they feeling under attack as an easy  
 'revenue raising' target by the Government or  
 are they content that the money raised in taxes  
 is being used to fill in the ubiquitous potholes?

Do environmental issues concern them or,  
 as with last year's Report, has the effort to  
 make financial ends meet pushed all external  
 concerns to the bottom of the list?

The RAC Report on Motoring 2010 shows motorists are becoming more inward-looking. They are more concerned about their home and local area than national or global issues and their energy is being spent on using what resources they have in the most cost efficient and effective way. They are not in the mood for change and if this has to happen then they need to be incentivised or forced to make the change through increased restrictions and penalties.

Motorists are looking for local solutions to the challenges they face on the roads. Fuel prices, potholes and road works are making them feel disenfranchised, with their concerns not being listened to on a national scale. So they are looking to their local surroundings to see whether they can highlight concerns and influence any of the solutions.



This means issues such as other people's behaviour – both behind the wheel and in driving without insurance and tax – are of much more concern than ever before. Following last year's trend, the environment has slipped even further down motorists' list of priorities. A positive side effect of the recession, however, is that driving more economically to save money also means driving in a more environmentally-friendly way.

Older drivers are also a focus of this year's Report on Motoring. With an ageing population, issues such as whether there should be regular medical tests and at what age they should start cannot be ignored. Motorists of all ages agree there should be regular medical tests – and many would be happy to take them throughout their driving career. Refresher courses are also favoured, as evidence does show that a motorist's responses slow down with age.

While saving the planet may not be top of a motorist's list of priorities, there is growing interest in electric vehicles. Drivers want more information and a better network of charging points before

they will commit themselves, but there is a willingness to change provided they are cheaper and more environmentally-friendly to run than conventional cars.

With a new coalition Government settling itself into Downing Street, there is scope to re-open the dialogue and give motorists a fairer deal. Their concerns are reasonable and their wish list feasible, even taking into account the dire state of the economy.

So far, the new Government has shown every indication that it is willing to look for a new path. Secretary of State for Transport Philip Hammond has already pledged to end the "war on motorists" and the coalition has promised, amongst other things, a national network of recharging points for electric vehicles and new ways to make roads safer, such as introducing 'drugalysers'.

The challenge for both Government and motorists is to work together to create a sustainable framework for the future, allowing people to drive as they need to, but also meeting environmental and economic targets.



Despite volatile fuel costs, British motorists are still wedded to their cars. They may be using other modes of transport more as part of an overall cost cutting programme, but they still love their wheels. >>

# 2.0 Who is the motorist?

**65%**

would use their car less if public transport were better





# 2.0 Who is the motorist?

Motorists' continued dependence and affection for their cars offers a real challenge to any Government wanting to reduce car usage. It is as yet unclear whether the trend towards motorists leaving the car at home for some of their journeys is a sustainable trend, or one that will fall by the wayside once the economy improves and they can afford to pay for the increasing cost of fuel. So what has been happening to the motorist over the last year?

## 2.1 What motorists are driving

The type of cars motorists are driving has changed marginally over the last 12 months, with fewer top end cars on the road. A third still drive a mini or supermini and nearly two in five a small or medium sized car. But the number of people driving a people carrier or 4x4 has dropped slightly to just one in ten and the number of drivers of luxury or sports cars has almost halved to just one in 20. Rising fuel prices and higher car tax are likely to have played a part in this decline.

Number of drivers of a luxury or sports car has almost halved to **1 in 20**

**1/3** drive a supermini



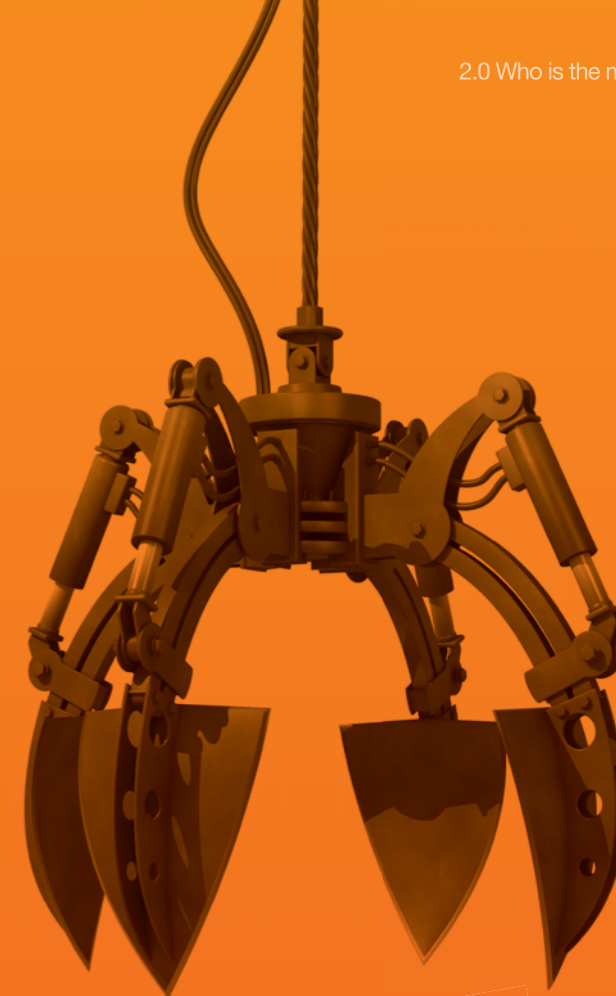
Just **1 in 10** drivers drive a 4x4

**2 in 5** drive a small or medium sized car

RAC calls for initiatives that encourage motorists to drive more up-to-date vehicles. See page 60 for full RAC call to action.

Just over half of households have one car and over a third, two. One in 10 homes has three or more cars sitting on the drive or in the garage.

The car scrappage scheme has had an effect on the age of the cars motorists are driving with 9% of motorists driving a car less than a year old, up from 8% in 2009\*. But more noticeable is that the number of motorists driving a car more than 10 years old has fallen by 5% to 12%. This is due in large part to the car scrappage scheme in place until April this year, which took more than 400,000 cars over 10 years old off the road†. Now the average age of the cars on the road is 5.5 years, a month younger than last year.



*“The scrappage scheme has been successful not only in terms of generating increased car sales but also through the knock-on effects of the higher environmental and safety standards of the new cars bought under the scheme”*  
 Paul Everitt  
 Chief Executive, Society of Motor Manufacturers and Traders

\* RAC Report on Motoring 2009, [www.rac.co.uk](http://www.rac.co.uk)  
 † The Society of Motor Manufacturers and Traders (SMMT), [www.smmt.co.uk](http://www.smmt.co.uk)



# 2.0 Who is the motorist?

## 2.2 Driving habits

While many motorists feel they are driving more – this year they estimated they drive an average 9,335 miles a year, an increase of 725 on 2009 – the reality is somewhat different. Motorists are actually driving less.

According to Department for Transport figures car traffic fell by 3% in the first quarter of this year against the same period in 2009 and all types of traffic fell by 2.1% over the same period\*.

One of the more interesting changes this year is the type of journeys taken. Almost three in five motorists now amalgamate shorter journeys into one longer one, leading to 51% saying they make fewer shorter journeys. Department for Transport figures confirm this trend with a rise in the number of medium length journeys – these are defined as being between five and 25 miles.

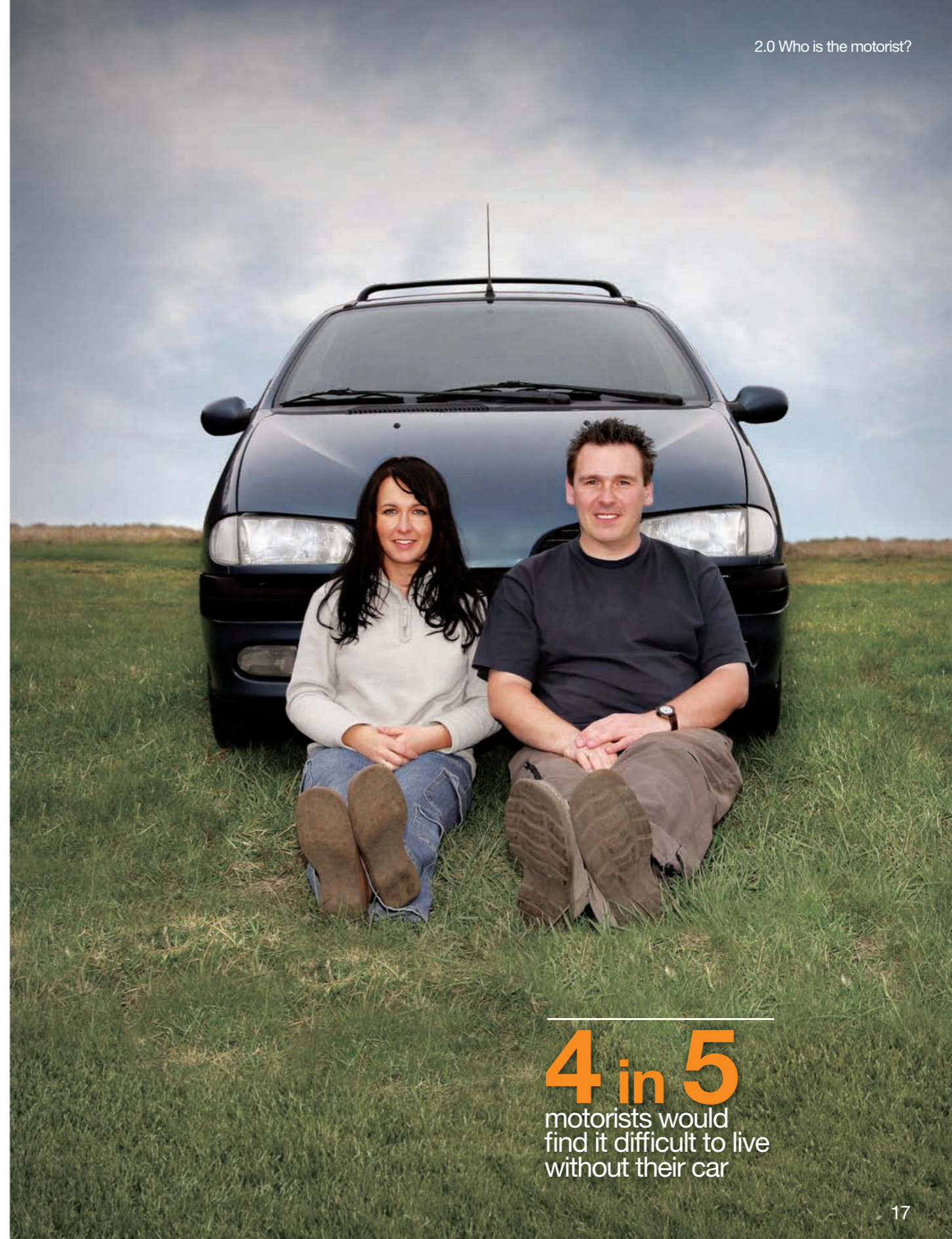
More than 40% of drivers have also cut down on the number of longer journeys they take – with 18% doing so for financial reasons. In line with the trend seen last year, the reduction in driving is not environmentally motivated for the vast majority of motorists – only 4% gave this as a reason to cut down the number of longer journeys.

But hopefully the environmental benefits of fewer miles being driven will be maintained if drivers perpetuate this change in driving habits after the recession ends.

**3 in 5**  
motorists now  
amalgamate journeys



\* Department for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)



**4 in 5**  
motorists would  
find it difficult to live  
without their car



# 2.0 Who is the motorist?

## 2.3 Changing driving behaviour

Last year's Report on Motoring saw a huge shift in driver behaviour motivated by economic conditions\*. This year, while their behaviour is still being modified, the changes are less dramatic.

This year two in five motorists have changed their driving style to conserve fuel – against just over half that said they changed it last year. More than two in five are walking more and 11% are car sharing more than last year. More surprisingly, one in 10 has sold their car and is opting to use other modes of transport and one in six has reduced the number of cars in their household. The number of cars per household has fallen steadily over the years. In 2005, 47% of households had two cars; this has now fallen to 37% as the cost of keeping a car has made it less affordable.

There is a long term trend for drivers to use buses, coaches and trams more – a steady increase from 50% in the 2007 Report on Motoring† to 66% this year. Train travel has also increased in popularity over the years, with two thirds of motorists now using this mode of transport. It has already been noted that motorists are making fewer journeys, and drivers say they are less likely to be a passenger in a car (typically driven by family or friends) down 5 points this year to 87%.

**1/3**  
think most people in cars could use public transport instead



\* RAC Report on Motoring 2009, [www.rac.co.uk](http://www.rac.co.uk)  
† RAC Report on Motoring 2007, [www.rac.co.uk](http://www.rac.co.uk)



**Train travel has also increased in popularity over the years, with two thirds of motorists now using this mode of transport.**



# 3.0 Motorists' concerns

While motorists may be less concerned about global issues, they are more engaged with their own personal driving environment. >>



# 3.0 Motorists' concerns

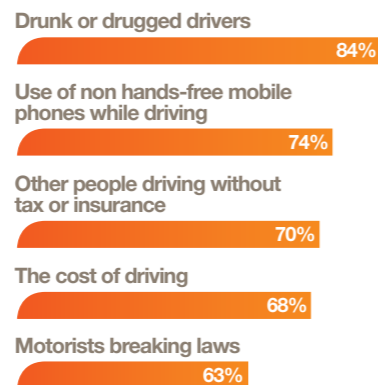
Motorists know that the state of public finances and reduced emission targets are out of their control, but they do want to try and influence their local roads and journeys. This translates into concern about the roads in their local area and more importantly the behaviour of the other drivers they encounter while in their cars. So what is currently worrying the motorist?

### 3.1 Other drivers

The behaviour of other drivers on the road is of most concern to all drivers – knocking the cost of motoring off the top spot. This again harks back to a desire to control their driving environment and perhaps an acceptance that the cost of motoring is high and likely to keep increasing.

This year motorists' biggest concerns were people driving under the influence of drink or drugs, followed by using a mobile phone without a hands-free kit while driving and driving without tax or insurance.

### Motorists' top concerns:



**39%**  
were very concerned about the rudeness of other drivers



Roads need to be better managed in winter, and damage repaired faster.  
See page 60 for full RAC call to action.

Drivers are also conscious that both older and younger drivers are at greater risk of being involved in accidents. Some 27% of motorists are very concerned with the behaviour of drivers under the age of 21 while 22% are very concerned with the driving ability of the over 70s. Statistically however younger drivers are more likely to be involved in an accident\*.

### 3.2 The state of the roads

The state of the roads is a perennial problem. But this year it has come to the fore because of the damage caused by the snow and prolonged cold weather this winter.

In March, the Department for Transport gave local authorities an extra £100 million to deal with potholes†, but 96% of motorists are still concerned with the condition and maintenance of the roads. Splitting this down further, 88% believe their local roads are getting noticeably worse and 70% of motorists believe the quality of motorways and other major roads is noticeably worse these days.

\* Institute of Advanced Motorists, [www.iam.org.uk](http://www.iam.org.uk)  
† Department for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)



## 3.0 Motorists' concerns

### 3.3 Congestion

Motorists are exasperated at the state of the roads and the conditions they are forced to drive under, but their frustration is more targeted. Levels of concern over traffic congestion and slower journey times have fallen from 64% in 2007 to just 41% this year, a massive 23 point drop. Now, it is the unexpected and unnecessary delays which cause anger – and leave half of drivers feeling more frustrated and annoyed than they did a few years ago. Motorists want to know how long their journey is going to take, however long, so they can plan around it. Linked with this – and often the cause of the disruption – 86% of drivers are concerned about road closures and road works.

Advanced warning signs are the most popular measure to reduce congestion, with two in five motorists saying they had a positive effect. Just over a third believes active traffic management and hard shoulder running had a beneficial effect. However, a significant percentage – 40% and 32% respectively believed the measures made no difference to congestion.

Hard shoulder running is currently only in operation on a section of the M42 in the West Midlands, though it has been approved for nationwide rollout – from Manchester to Bristol – as a means of easing congestion.

### 3.4 The environment

While the environment is covered in greater detail later in the Report, it is worth noting how environmental concerns have fallen down motorists' list of priorities. In 2007 before the recession hit, 51% of motorists were very concerned about green issues and the effect that their driving had on the environment\*. In 2010, less than a quarter of motorists have these concerns, and one in four drivers doesn't think it's realistic to take environmental issues into account in today's motoring world.

**“We are very encouraged that motorists are recognising the benefits of hard shoulder running. This is a fantastic result.”**

Graham Dalton  
Chief Executive, Highways Agency

Active Traffic Management (ATM) is a tool box that can be used to manage traffic flows in peak traffic periods. The tool box includes measures such as electronic signage above lanes to vary the speed limit and use of the hard shoulder as a running lane. All of these can be used on a mix and match basis depending on local requirements and constraints.



\* RAC Report on Motoring 2007, [www.rac.co.uk](http://www.rac.co.uk)



# 4.0 The law abiding driver?

The vast majority (90%) of drivers believe they are law abiding – but the reality could be somewhat different. Many admit to speeding or using their phones inappropriately. But does this contradiction arise because they believe the law is inappropriate? Motorway speed limits haven't changed since the 1960s though cars, the roads and traffic levels have changed beyond recognition. A majority of motorists appear to believe that 80 mph may well be the new 70 mph in terms of how fast a car can safely be driven on a motorway. >>





# 4.0 The law abiding driver?

As evidenced earlier, motorists are concerned about other drivers' behaviour, particularly drink and drug driving and driving without tax or insurance. They are content with their own driving and will only change if forced through penalties or encouraged through incentives, but they expect other drivers to change their ways. This ties in with the increasing belief that motorists are unlikely to get caught if they break motoring laws and that there are not enough police on the roads to enforce traffic law. So just how law abiding are motorists?

## 4.1 Drink and drugs

In 2009, the previous Government spent £5 million on anti-drink and drug driving campaigns\*. It also commissioned Sir Peter North to produce a report – The North Review of Drink and Drug Driving Law – into potential changes to these laws. The findings were expected as The RAC Report on Motoring 2010 went to press. But how well do motorists understand the current limit and do they agree with it?

Drivers are evenly split with 41% claiming they know the drink drive limit and 42% unsure – 17% say they do not know the limit. But when this was tested, only 16% know that the limit is 80mg of alcohol per 100ml of blood. The fault however may lie with the terminology used

\* Central Office of Information, [www.coi.gov.uk](http://www.coi.gov.uk)

† Current drink-driving and drug-driving laws can be found at [www.dft.gov.uk](http://www.dft.gov.uk)

to describe alcohol limits, as, when asked to quantify limits using measures such as pints of beer or glasses of wine, the vast majority took a conservative view as to how many could be consumed while remaining under the legal limit.

This year 87% of motorists backed a reduction in the drink-drive limit to below the current 80mg of alcohol per 100ml of blood, a huge increase from 50% who were in favour last year: almost a quarter (23%) supported a limit of 50mg of alcohol per 100ml of blood, and support for a zero drink drive limit increasing significantly, from just over a third (35%) last year to almost half (46%) this year. Least supportive of a total ban are the over 70s.

Almost two thirds of motorists claim never to have driven while over the alcohol limit, but a worrying 12% know they have broken the law in this way, with a further 11% unsure.

6% of motorists know they've driven over the limit the next morning and 17% think they may have done.

64% say they have never driven with someone who was over the limit, down from 67% last year.

29% have been a passenger with someone shortly after they had a drink and 13% the morning after a big night out.

Britain, Ireland and Malta are the only European countries with a legal blood alcohol concentration limit higher than 50mg of alcohol per 100ml blood. An increasing number of countries including Sweden and Poland have set a 20mg limit and Slovakia, Czech Republic, Hungary and Romania are zero-tolerance\*.

**6%** know they've driven over the alcohol limit the next morning

**12%** know they've driven over the alcohol limit

**29%** have been a passenger shortly after the driver had a drink

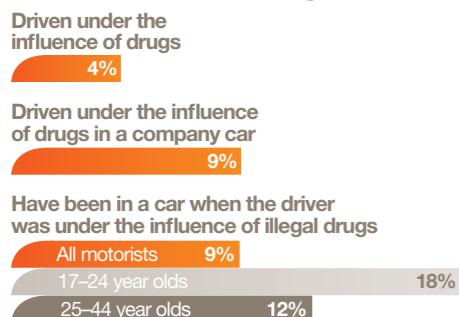
Current penalties for drink or drug driving are a maximum £5,000 fine, an automatic disqualification and up to two years imprisonment. If someone is killed while the motorist is under the influence, an unlimited fine can be imposed, a minimum two year driving ban and up to 14 years in prison†.



# 4.0 The law abiding driver?

There is better news on the drugs front – which could be an indication that Government campaigns are getting the message across.

## Driving under the influence of drugs:



Some common medicines that you can buy over-the-counter from your pharmacy or supermarket have the potential to cause drowsiness.

These include medicines that you might take for: cough, hayfever, worm treatments, analgesics, anti-nausea treatments and medicines for gastrointestinal upsets\*.

RAC welcomes a reduction in the drink drive limit and calls for a timetable for the swift introduction of drugalysers.  
See page 60 for full RAC call to action.



## 4.2 Speeding

Speeding is the area where motorists are most likely to admit to breaking the law. Almost three quarters of drivers admit to breaking the speed limit on motorways, 57% on urban roads with a 30 mph speed limit, 45% on country roads with a 50 or 60 mph limit and 44% on roads in 20 mph urban zones. More worryingly 8% also said there were no deterrents that would stop them speeding. According to the Home Office, 1.46 million fixed penalty notices were issued for speeding by police in 2007†.

This disregard of speed limits, particularly on motorways, may be fuelled by a belief that limits should be raised on certain types of roads.

It is interesting to note that the belief that speed limits are too low has been increasing significantly year on year – for example, only 69% supported higher motorway limits last year.”

Three fifths want 20 mph zones to be maintained, though 37% would like the limit to be raised to either 25 or 30 mph.

A quarter want urban limits to be lifted above 30 mph, with 13% to 35 mph.

13% want the limit on country roads to be raised from either 50 or 60 mph, and one in 10 to 70 mph.

Three quarters want the limit on a motorway to be raised above 70 mph, and 52% to 80 mph. 12% of company car drivers would like to see the limit raised to 100 mph.

“The attitude to 20 mph zones is in transition. Motorists are encountering these zones in their local areas, particularly around schools, and are seeing the benefits. It’s down to familiarity. There is much more widespread support now.”

Stephen Joseph  
Executive Director of the Campaign for Better Transport



\* Consumer Health Information Centre, [www.chic.org.uk](http://www.chic.org.uk)  
† Home Office Statistical Bulletin, April 2009, [www.homeoffice.gov.uk](http://www.homeoffice.gov.uk)



# 4.0 The law abiding driver?

## 4.3 Distraction

While drivers admit to frequently carrying out activities that have the potential to distract them when driving, (either while moving or sat at lights or stationary in a traffic jam), many do not consider themselves to be distracted.

28% of motorists use their phone without a hands free kit and half admitted to being distracted. People aged 25-44 were the worst offenders with 13% taking calls when driving and 26% while stationary. Some 46% of those receiving calls claim not to be distracted by this. Last year only 8% admitted to using a mobile without a hands free kit.\*

### Mobile phone usage:

Motorists using their phone, without a hands free kit, while on the road



Motorists texting while on the road



■ 2010 ■ 2009



\* RAC Report on Motoring 2009, [www.rac.co.uk](http://www.rac.co.uk)  
 † Department for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)

31% admit to texting while on the road – and 6% of them while actually driving, yet only 53% of this group felt this might distract them. Young drivers were most likely to do this with 14% texting while driving and 40% when temporarily stationary, yet 42% claimed never to be distracted by this activity. Last year 11% admitted breaking the law this way.

Latest statistics from the Department for Transport reveal that in 2009 drivers using mobile phones caused 31 fatal crashes, 70 crashes where one or more of the people involved were seriously injured and there were 534 casualties in total. In-car distraction was identified as having led to 65 deaths, 469 serious injuries and a total of 4,763 casualties†.

In-car distraction was identified as having led to

**4,763** casualties



49% want a built in speed limiter in vehicles

## 4.4 Punishment

Most motorists believe they are law abiding, which is reflected in their desire for tougher punishments for those caught breaking the law and for more measures that force people to moderate their behaviour. For example:

85% want harsher sentencing, within the current framework for those who seriously injure or kill someone while under the influence of alcohol or drugs.

Three in five believe in 'two strikes and you're out', with a jail sentence if caught over the limit more than once.

Just over half (53%) support alco-locks, which automatically prevent the car from being driven by someone over the prescribed limit.

Almost half (49%) want a built in speed limiter in vehicles.

For 48%, a higher likelihood of getting caught would act as a deterrent to speeding.

Just over a quarter think on-the-spot fines should be introduced for speeding offences.

More random breath testing was supported by 64% of motorists.



**3 in 5**

believe in a jail sentence if caught over the limit more than once

RAC calls for focussed enforcement and stronger policing of existing laws on mobile phone usage.  
 See page 60 for full RAC call to action.



# 5.0

## The environment and the motorist

As evidenced earlier in the Report, environmental concerns have continued to slip down the priority list for motorists. For the majority, financial issues come first. If they coincide with helping the environment then so much the better, but saving money is driving motorists' decisions. >>





# 5.0 The environment and the motorist

This trend was evident last year, and as then it is difficult to know if this behaviour will be reversed once the economy is back on its feet. With motorists' current mindset however, it appears the only way to get the environment back on the agenda would be to promote the uptake of more environmentally-friendly vehicles through greater incentives – or disincentives for less environmentally-friendly vehicles. But will motorists ever voluntarily help save the planet through their motoring choices?

## 5.1 Current thinking

Almost two thirds of motorists think they play their part by making changes to be more environmentally-friendly, though:



## 5.2 New car purchases

Environmental considerations are not coming naturally to motorists but manufacturers are contributing by constantly improving the environmental performance of their vehicles. Also, better in-car information, such as current fuel consumption, can encourage more fuel-efficient and thus more environmentally-friendly driving.

## Motorists' considerations when buying a new car

Will definitely consider buying an environmentally-friendly car

32%

Would consider an alternative fuel powered vehicle

34%

If tax incentives were better

44%

Will take CO<sub>2</sub> emissions into account

45%

May consider buying an environmentally-friendly car

56%

Of those that said 'definitely' or 'maybe' to considering an environmentally-friendly car, three quarters would look at a smaller/lower CO<sub>2</sub> emitting car, 62% would consider a hybrid and 50% a natural gas powered car. 44% would consider an electric car, more of which in the next chapter.

## 5.3 Company car drivers

There are almost 3.3 million company car drivers\*, and they appear to be the least environmentally conscious group of motorists. They are least likely to downsize their car, with almost half reluctant to buy a smaller car as their next purchase, against a third of those who own their car privately.

They are also marginally less likely to buy a car powered by alternative fuels, with more than a third unlikely to consider such vehicles as opposed to 3 in 10 of private car drivers. While their views are understandable, in that they clock up high mileages and often drive in city congestion, any company wanting to prove its green credentials may want to incentivise its workforce to buy smaller and more environmentally-friendly vehicles.

Employers could also explore the CBI proposal to change working patterns to ease congestion, contained in its report 'Tackling congestion, driving growth – a new approach to roads policy'<sup>†</sup>.

Motorists' preferences shown above reflect the amount of information and understanding they have of different types of environmentally-friendly cars. The challenge facing Government and manufacturers is to properly explain and demonstrate the benefits of switching to these types of vehicles over more traditional fuel powered cars. They need to prove to motorists that it will save them money to own and run a more environmentally-friendly car.

35%

of motorists don't believe anything they do will make a difference to the environment

\* Department for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)  
<sup>†</sup> Confederation of British Industry, [www.cbi.org.uk](http://www.cbi.org.uk)



# 6.0 Electric vehicles, the future of motoring?

Until recently electric powered cars were typically the preserve of small fringe manufacturers, but now, volume car manufacturers such as Nissan, Peugeot and Volkswagen Group are all developing their own version of the electric vehicle. >>



# 6.0 Electric vehicles, the future of motoring?

To make these alternative powered cars a credible option, they must have a lower carbon footprint when taking into account manufacture and end-of-life disposal of the vehicle, the generation of the electricity used to power them and the day-to-day running of the vehicles.

Manufacturers have a long way to go to convince motorists to buy such vehicles – with one in seven motorists claiming that nothing would make them do so.

Concerns include the range of a single charge, lack of power points and the cost of buying and running the vehicles themselves. But the journey is not impossible with six in 10 motorists seeing them as a viable alternative. So can electric vehicles become mainstream?



A fifty pence charge can give 40 miles of driving\*.

\* Electric Vehicle (EV) Network UK, [www.ev-network.org.uk](http://www.ev-network.org.uk)

## 6.1 The issues

87% of motorists have heard of electric vehicles, and their biggest concern is the distance they can travel on a single charge.

Almost a quarter want them to travel 200 miles on a single charge – comparable to a tank of petrol or diesel. 18% would be happy with a 100 mile range and 12% 150 miles per charge.

Two in five are also concerned about the availability of charging points.

A third needs the price to fall before they will consider them.

Almost a quarter need convincing they are cheaper to run than conventional cars. According to EV Network UK, charging a car with 10 kwh costs about 50 pence using a night time rate and can provide around 40 miles of driving\*.



## The Regional Development Agency One North East conducted public trials of four electric vehicles for six months from September 2009. The results included:

Post test-drive, 72% of people said they would use an electric vehicle as their regular car.

The car exceeded the public's expectations on all monitored performance aspects.

Drivers found charging the vehicle easy, safe and reliable.

Drivers were over-cautious about the car's battery life when planning journeys – they suffered 'range-anxiety' with the maximum journey length being only 11.06 miles, well short of the 44.99 mile range of the vehicles.

People began modifying their driving behaviour when the charge approached 50% in order to conserve electricity.

The cars emitted an average of 53.1g CO<sub>2</sub>/mile when recharged with UK average grid mix electricity. This represents almost half the average emissions from new cars in the UK, which last year was 92.89g CO<sub>2</sub>/mile\*.

Concerns over the range of electric vehicles highlight the misconceptions motorists can have. The average journey is currently well below 50 miles. The most up-to-date statistic from the Department for Transport reveals the average journey length in 2006 was just 6.9 miles†. But the lack of power points is a very real issue and for electric cars to become mainstream the numbers available – including ones for use at home – need to increase considerably. While the new Government has said that it “will mandate a national recharging network for electric and plug-in hybrid vehicles”, there are currently only some 200 charging points in the whole of the UK.



\* One North East, [www.onenortheast.co.uk](http://www.onenortheast.co.uk)  
 † Department for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)



# 6.0 Electric vehicles, the future of motoring?

## 6.2 Choice of vehicles

According to the Green Car Site there are currently 15 electric vehicle models and eight hybrid electric models available in the UK. Proposals from the last Government would have given motorists buying an electric car an up to £5,000 Plug-in car grant from January 2011, but it remains to be seen whether this commitment will be honoured by the new Government. Electric vehicles pay no road tax or the London Congestion Charge.



Electric vehicles pay no road tax or the London Congestion Charge...



Public information is needed on the running costs and capabilities of electric vehicles. See page 60 for full RAC call to action.

**Electric Vehicles:** These are powered by an electric motor which draws its power from an on-board battery pack. Batteries are charged by simply connecting the vehicle to a mains power supply, and they are usually charged overnight for a full charge.

**Hybrid Vehicles:** These use a combination of two power sources – a conventional combustion engine and an electric motor. Batteries power the electric motor, which is typically in use when the vehicle is travelling at low speed or in traffic. The petrol or diesel engine then powers the car when more power is needed such as at higher speeds, allowing it to operate at its more optimum efficient speeds. The combustion engine is used to recharge the battery, therefore hybrid cars do not need to be plugged into an external power supply. The latest generation of hybrids, known as plug-in hybrids can plug into the mains to charge the batteries in a similar manner to fully electric vehicles.

Current electric vehicles and hybrid vehicles include\*:

### Electric

**G-Wiz**

Range 40 – 48 miles  
Charge time up to 8 hours  
Top speed 50 mph



**Nice Mega City**

Range up to 60 miles  
Charge time up to 8 hours  
Top speed 40 mph



**Quiet Car**

Range up to 60 miles  
Charge time up to 6 hours  
Top speed of 50 mph



**Citroen C1 ev'ie**

Range up to 75 miles  
Charge time up to 6 hours  
Top speed 60 mph



**Tesla Roadster**

Range up to 240 miles  
Charge time up to 16 hours  
Top speed 130 mph



**Nissan Leaf**

Launches in 2011



### Hybrid

**Honda Insight†**

Maximum speed 113 mph  
Acceleration  
0-62mph – 12.5 seconds



**Toyota Prius‡**

Maximum speed 11.78 mph  
Acceleration  
0-62mph – 10.4 seconds



\* The Green Car Site, [www.greencarsite.co.uk](http://www.greencarsite.co.uk)  
† [www.honda.co.uk](http://www.honda.co.uk)  
‡ [www.toyota.co.uk](http://www.toyota.co.uk)



# 7.0

# The impact of an ageing population

The average age of motorists is, along with the general population, increasing. It is estimated there will be 10.4 million people over the age of 65 in 2011 rising to 12.7 million in 2021. And the number of male drivers over 70 is expected to double over the next 20 years, with the number of female drivers to triple\*. >>



\* Institute of Advanced Motorists, [www.iam.org.uk](http://www.iam.org.uk)



# 7.0 The impact of an ageing population

For most older drivers, their car is vital to maintaining their independence. Once they are unable to drive, their ability to interact with the rest of society is put at risk, as they become more dependent on other people to give them lifts or else rely on an often inadequate public transport system. So what are older drivers thinking?

## 7.1 Older driver views

In the main, drivers over the age of 70 have similar views to the rest of the driving population. However:

96% believe they are law abiding drivers against 90% of all drivers.

Older drivers are less likely to be distracted while actually driving with no respondents admitting to using a mobile phone without a hands free kit, doing their hair or makeup while driving or texting against 8%, 3% and 6% respectively for all age groups.

Only 37% of older drivers support a complete ban on drink driving compared to 46% of all drivers and they are more inclined to keep the status quo on drink driving with 22% supporting 80mg against 14% of all drivers.

One third think the taxes paid are a fair price for motoring freedom, against 24% for all drivers.

85% believe taxes should be directly related to how much a car is used against 66% of all drivers.

87% think advanced warning signs make the roads safer against 72% of all drivers.

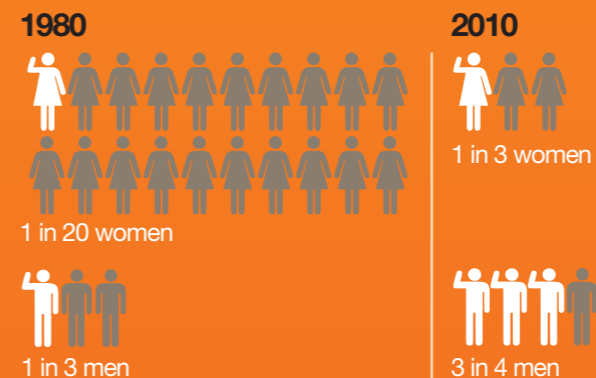
## 7.2 Limitations to change

Older drivers have much less physical flexibility to change their travelling behaviour. Only 32% have started walking more over the last 12 months against 43% of all drivers, and only 4% cycle more against 12% of all drivers. They have however started to use public transport more, with 32% of motorists over 70 claiming to have increased their use of public transport against 24% of the general driving population.

## 7.3 The statistics

A recent IAM report, 'Older Drivers: Safe or Unsafe?' revealed that 8% of drivers are over 70, yet they are involved in around 4% of injury crashes. In contrast, the 15% of drivers in their teens and twenties are involved in 34% of injury crashes. RAC's research indicates that only two thirds of over 70s motorists drive every day – against 77% for all age groups, and two thirds drive less than 6,000 miles a year against 43% for all age groups.

## Licence holders over 70 according to the Advanced Motorists (IAM)



The IAM report concluded that drivers under 70 are no more likely to be the cause of a crash than other drivers. But once over 70, they are more likely to be at fault, especially in right-of-way incidents. Also drivers over 85 are four times more likely to have caused a crash than to have been an innocent victim of one<sup>†</sup>. The Association of British Insurers' statistics also reveal that the average cost of a claim by a 60-64 year-old is £1,170, while the average claim made by a driver aged 80 or over is almost 50% more expensive at £1,716.

## 7.4 Driver confidence

Older drivers know their limitations more than any other group – hence the lower accident rate.

Whereas road junctions, roundabouts and toll roads do not trouble the over 70s motorist, a quarter of this age group admitted to lacking confidence driving in wintry weather, and 14% weren't confident driving in poor road conditions. Arriving at their final destination is also a potential issue, with 18% lacking confidence driving to a place they don't know, and 14% unsure about using Sat Nav technology. Compared to all motorists, older drivers were twice as likely to lack confidence driving at night (16% compared to 8% for all age groups) and much more concerned about driving in rush hour traffic (12% against 5% for all age groups)<sup>‡</sup>.



\* Institute of Advanced Motorists, [www.iam.org.uk](http://www.iam.org.uk)  
 † Association of British Insurers, [www.abi.org.uk](http://www.abi.org.uk)  
 ‡ RAC/ICM motorist research June 2010



# 7.0 The impact of an ageing population

## 7.5 Physical limitations

While there does not appear to be any particular age where driving ability begins to deteriorate, tests by the Transport Research Laboratory have shown that on average, drivers aged over 55 take 22% longer to react than drivers under 30. This would add two car lengths to the stopping distance if braking from 70 mph. They also are more affected by glare when driving at night. According to the Department for Transport, recovery time from glare increases from two to nine seconds between the ages of 15 and 65<sup>†</sup>.

## 7.6 Older drivers and their fellow motorists

Agreeing to a compulsory medical check at 70 **69%**

Agreeing to compulsory driving evaluations at 70 **61%**

Agreeing to both medical checks and driving evaluations at 70 **56%**

These figures mask an age divide. Between 72% and 77% of age groups under 64 years old think medical tests should be compulsory but only 54% of 65-69 year olds and 34% of over 70s agree. Similarly between 57% and 79% of motorists under 64 years old agree with driving evaluations, against 38% of 65-69 year olds and only 22% of over 70s. Support for both tests plummets from 72% to 20% as

drivers' age and the prospect of taking these tests becomes more immediate. Older drivers however are happy to be tested as part of a programme to check all drivers provided they are not being singled out. 44% of over 70 year olds and 39% of 65-69 years think regular testing for all is a good idea. The measure receives even higher support from 25-44, as half of this age group would welcome regular testing for all drivers.

**Under current rules motorists must get their driving licence renewed with a self-declaration of fitness to drive at the age of 70.**

**Depending on the information given in the self declaration, further information can be sought by the DVLA from the motorist's GP or a medical assessment may be required.**

**The licence must then be renewed at the latest every three years depending on what conditions the motorist suffers from.**

RAC would welcome Government initiatives to help older drivers to drive safely as well as providing viable transport alternatives.  
**See page 60 for full RAC call to action.**

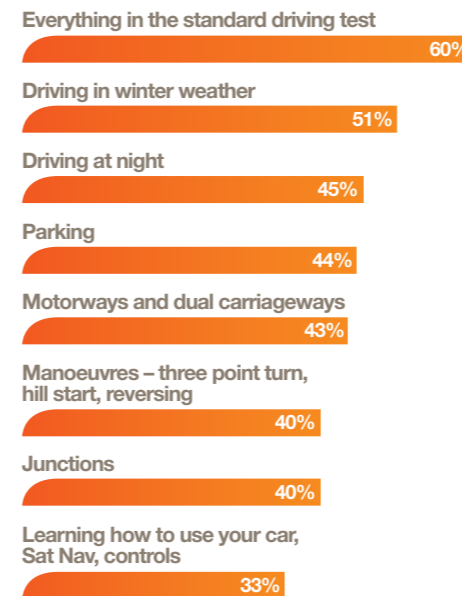
A review is needed of compulsory regular medical testing and refresher courses for all motorists.  
**See page 60 for full RAC call to action.**

Motorists are split down the middle regarding a maximum age limit for driving. Restrictions on when and where older people can drive are even less popular. 57% of motorists disagree that older drivers should be limited to daylight hours and 61% are against restrictions stopping them driving on motorways at peak times.

## 7.7 The future

With an ageing society, the whole issue of older drivers will need to be re-evaluated. A car is a symbol of independence and a lifeline for many older people which must not be taken away without good cause. As people remain healthier and live longer is 70 the new 60 for motorists? The issues do need to be reviewed for both the sake of older drivers and anyone who shares the roads with them.

## What motorists over 70 would like covered in a refresher driving course<sup>‡</sup>:



**“This is an increasingly important issue for society. We need a better understanding of the mobility needs and aspirations of our ageing population.”**

Robert Gifford  
Executive Director  
Parliamentary Advisory Panel  
for Transport Safety



\* Transport Research Laboratory, [www.trl.co.uk](http://www.trl.co.uk) † Dept for Transport, [www.dft.gov.uk](http://www.dft.gov.uk)  
‡ RAC/ICM motorist research June 2010 § [www.directgov.uk/motoring](http://www.directgov.uk/motoring)



# 8.0 The economy and the motorist

Saving money is high on motorists' list of priorities. Half of motorists think that the high levels of tax levied on motorists are meant to act as a deterrent – pricing some off the road completely and limiting the amount of driving others can afford to undertake. >>





# 8.0 The economy and the motorist

They are very unhappy about the situation, and say that more should be ploughed back into both local roads and public transport. So what else do motorists think? Do they understand the new road tax bands and have they accepted that speed cameras save lives or are they still seen as revenue raisers?

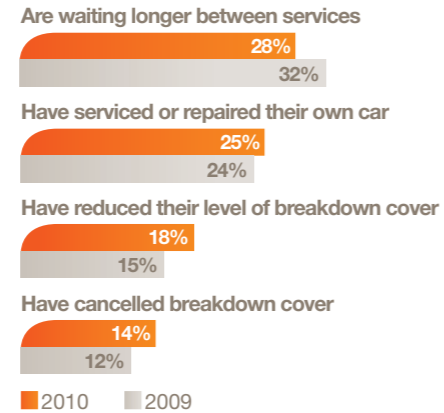
## 8.1 Saving money

On 1 October 2009 a litre of unleaded petrol cost an average 98p, on 15 June 2010 the average had soared to 118.1p\*. With fuel costs rising this rapidly, many motorists are driving less and looking for other ways to save money in order to fund their motoring.

Motorists were asked what specific actions they have taken to save money – and the trends of last year, some deeply worrying, have continued.

\* www.petrolprices.com

## Money saving actions:



While these measures may appear to be saving money, motorists could actually be making a false economy. DIY repairs may not be as effective or as safe as those done by a professional. If they break down, having cancelled or reduced their roadside assistance cover, they could find themselves facing a bill for hundreds of pounds to get their car recovered to a garage and repaired.

51% were walking more and driving less, more than a third modifying their behaviour for personal and financial reasons.

41% used public transport more, with 29% citing financial or personal reasons for the change.

76% shopped around for car insurance.

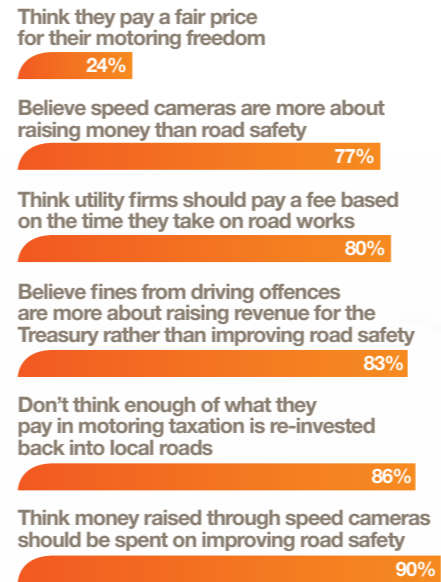
Government needs to demonstrate transparency and value for money from taxation revenue.  
See page 60 for full RAC call to action.

## 8.2 Taxation

Just over two in five motorists claim to understand the new road tax (Vehicle Excise Duty ratings) which sets the amount of tax payable based on the car's fuel type and CO<sub>2</sub> emissions. This shows a steady increase since the measures were announced in the 2008 Budget.

Motorists are not happy with the amount of tax they pay, and more importantly how it is spent.

## Taxation concerns:



Many motorists, especially those in rural areas, have no alternative. They don't have the option to drastically change their driving habits. They know that motorists must pay taxes to fund the road network, its administration and policing, as well as to offset the environmental impact of motoring, but two thirds want motoring taxes to be directly linked to how much a car is used. In addition, half of motorists believe it should be linked to when and where they drive. They want a fairer and more transparent system of taxation and one that rewards them with lower taxes if they use alternative modes of transport.





# 9.0 Motorists and the Government

The new Government should take note of the mood of motorists and listen to their concerns. Motorists recognise that major investment in new roads is neither affordable, nor desirable. However, they do want better management and maintenance of the existing road network and a joined up transport policy. >>



# 9.0 Motorists and the Government

So what do motorists expect of the Government and how can the new coalition get them to re-engage with key motoring issues such as the environmental impact of motoring?

## 9.1 The history

While there is a temptation to believe that issues faced by today's motorists are new and unique, previous RAC Reports on Motoring show this is not the case. In 2005, the same year as the last general election, 84% of motorists considered themselves law abiding but 55% admitted to exceeding the speed limit every day. They were also concerned about the bad driving behaviour of other people\*.

Going back further to 2001, also an election year, 86% said they would find it difficult to adjust to

life without their car, while congestion and other people's driving were also of concern. Only 4% hankered after a more environmentally-friendly car and 25% wanted improvements to the infrastructure of the existing road network†.

Looking back further still to 1998, the year after the general election that saw Tony Blair elected into Downing Street, two thirds of motorists were calling on the new Government to encourage people to use public transport and half wanted more efficient use of existing roads. Some 60% also wanted the Government to subsidise manufacturers of fuel efficient vehicles, and 89% wanted tougher exhaust emission tests as part of the MOT to force the most polluting cars off the road‡.

## “We will end the war on motorists...”

Philip Hammond  
Secretary of State for Transport

“Motoring has got to get greener but the car is not going to go away.” New policy measures announced on 14 May 2010 include a new ‘fuel price stabiliser’ which will lead to a reduction in fuel duty if oil prices rise sharply; no new funding from central Government for the installation of speed cameras; and further efforts to curb rogue wheel clamping firms. He also ruled out the introduction of road pricing on the existing road network, although tolls could be introduced on newly built roads.

## 9.2 What do today's motorists want?

37% of motorists want improvements in the quality and condition of the existing road network to be the main priority for the new Government. Almost a third put a reduction in the cost of motoring as the top priority and 13% want the new Government to concentrate on improving road safety.

On the environment 56% say it's a big issue that Government should be tackling.

60% say financial incentives to go green such as the £5,000 electric car grant, and 57% think more investment in green public transport would help.

On congestion, motorists would like to see:

Tighter regulations of utility companies when conducting streetworks.

More investment in alternative modes of transport.

Congestion relieved in city centres by selective investment in local road infrastructure.

More park and ride schemes.

More integration of car travel with other modes of transport in city centres.

Motorists accept that the new Government will not have money to throw at transport policy, which is why their demands are the more powerful because in most cases they do not require huge investment – just joined up thinking.



\* RAC Report on Motoring 2005, [www.rac.co.uk](http://www.rac.co.uk)  
† RAC Report on Motoring 2001, [www.rac.co.uk](http://www.rac.co.uk)  
‡ RAC Report on Motoring 1998, [www.rac.co.uk](http://www.rac.co.uk)



# 10.0 Conclusion

# 10.0 Conclusion

This year's Report gives a deep insight into what drivers in the UK are thinking and feeling. They are still feeling disillusioned with the wider world around them and the way they were treated by the last Government. They have no control over the problems facing society such as high fuel prices, the huge Government deficit or limiting damage to the environment.

But they do want to be involved in their local surroundings and are focusing much of their attention on the problems they encounter on a daily basis, such as poor driving behaviour from other motorists. They are also looking to cut motoring costs wherever possible. But there is a glimmer of hope. The new Government has the opportunity to draw a line in the sand and move forward in a new partnership with motorists.

From the new Government they would like to see better maintenance of the existing road infrastructure – from filling in potholes and re-surfacing to making sure that they do not encounter road works on every road they drive. They want predictability of journey times – it does not matter that a journey takes longer than it has done in the past, what is important is that they know in advance that it's going to take longer.

TURNING SPACE ONLY  
No parking

Joined up thinking for all modes of transport is another key demand. Motorists would get out of their cars if the alternatives were better. But for many, public transport is not a viable option. With an ageing population it is more important than ever that a decent reliable alternative to the private car exists.

The issue of older drivers also needs reviewing, as evidence suggests that using 70 as the age that people become classified as 'old' in motoring terms is not supported by much evidence. Whether this translates into regular medical checks and refresher courses for all drivers, or the age at which licences have to be renewed is raised, coupled with, potentially, independent checks with a medical professional, is a debate that must be led by Government.

In return motorists are showing an interest in more environmentally-friendly cars, especially electric vehicles, once they are given all the facts – which offers a clear way forward.

Motorists know the transport budget has been slashed and in the main they are not calling for expensive measures such as new roads, just better use of existing resources and more joined up thinking in all areas of transport – public and private.

The majority of the adult population are motorists – and almost all of them are also voters. It is time for the coalition Government to form a new coalition – this time with motorists.





# RAC call to action

## New cars

Following the success of the car scrappage scheme for the economy, the motorist and the manufacturers, RAC calls for other initiatives that encourage motorists to drive more up-to-date vehicles which are safer, more reliable and more fuel-efficient.

## Road conditions

RAC calls for better planning and provisions for managing the roads during winter weather conditions, and quicker repair of damage such as potholes.

## Electric vehicles

RAC would like to see more information made publicly available on the running costs and capabilities of electric vehicles. RAC calls on the Government to consider making charging points compulsory in all new building regulations and to take the lead in switching its fleet to electric vehicles wherever feasible.

## Medical test and driver training

RAC would like to see the Government conduct a thorough assessment of the cost, benefit and practicalities of compulsory regular medical testing and refresher courses for all motorists.

## Driving under the influence

RAC supports measures to make driving safer such as random breath testing and would welcome a reduction in the drink drive limit to 50mg/100ml alongside improved public health campaigns to give drivers clearer guidance on drink driving limits and the dangers of the 'morning after' effect.

RAC welcomes the announcement by the new coalition Government that roadside drugalysers will be introduced, and would welcome publication of a timetable for implementation, as the drugalysers are needed as soon as possible. In addition, RAC would like to see efforts made to raise public awareness of the effects of some prescription drugs on driver safety behind the wheel.

## Distractions

RAC calls for focused enforcement of existing laws e.g. mobile phone usage, with more police on the roads acting as the best deterrent.

## Older drivers

RAC recognises that this age group has the challenge of personal mobility and independence and would welcome Government initiatives to help older drivers to continue to drive safely as well as providing viable alternatives.

## New Government, taxation and investment

RAC wants the new Government to focus on a fairer deal for drivers. Clarity and transparency must be provided by Government to motorists on how motoring taxation revenue is raised and spent, demonstrating value for money. Investment priorities should be based on return on investment.

To find out more and have your say, go to [rac.co.uk/reportonmotoring](http://rac.co.uk/reportonmotoring)





# Appendix

## Research methodology

The RAC Report on Motoring 2010 is based on a large-scale internet survey carried out by Quadrangle on behalf of RAC.

In total, Quadrangle interviewed 1,150 British motorists (i.e. those who hold a current driving licence and drive at least once a month). The survey was conducted in March 2010, with the questionnaire taking around 25 minutes to complete.

The sample was nationally representative of age, gender, socio-economic groups, all GB regions and new car buyers. The number of company car drivers in the sample was boosted by an additional 35 to provide sufficient numbers for analysis of this group (resulting in a total of 109 company car drivers in the overall sample). The results were then post-weighted to represent national household car ownership.

## Statistical reliability

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown are an estimate, within a small margin of error, of the actual figures. The error margin varies with the sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering so the error is lower for a 90/10 result than for a 50/50 result.

In order to illustrate the use of varying sample sizes and their affect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with different sample sizes from the car drivers' survey. For example, from a sample of 1,000, if 50% answered in a particular way, we would be 95% confident that the true range is between 47% and 53%.

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

# Company overview

## Contacts



With around seven million members, RAC is one of the UK's most progressive motoring organisations, providing services for both private and business motorists. Whether it's roadside assistance, insurance, vehicle inspections and checks, legal services or up-to-the-minute traffic and travel information – RAC is able to meet motorists' needs.

RAC is committed to providing the very highest levels of service to its members and has been ranked first for customer satisfaction by J.D. Power and Associates' UK Roadside Assistance Study for the last three years and the top named service organisation in the January 2010 UK Customer Satisfaction Index from the Institute of Customer Service.

Aviva bought RAC in May 2005. The acquisition brings together RAC's powerful brand and customer base with the expertise and leading position in motor insurance of Aviva UK Insurance (formerly Norwich Union Insurance). Aviva is the UK's largest insurer with a market share of around 15%.

RAC is part of Aviva, the world's fifth largest insurance group which operates in 28 countries.

RAC's news releases and a selection of images are available from the internet press centre at [www.racnews.co.uk](http://www.racnews.co.uk)

Media enquiries: **Adrian Tink**  
 RAC Motoring Strategist  
 Tel: 01603 681922 Email: [adrian.tink@aviva.co.uk](mailto:adrian.tink@aviva.co.uk)  
 Public Affairs enquiries: **Liz Chettleburgh**  
 Senior Public Affairs Manager  
 Tel: 01603 689317 Email: [liz.chettleburgh@aviva.com](mailto:liz.chettleburgh@aviva.com)

## Advisory Panel

The Report has been guided by the expert contributions of the RAC Report on Motoring 2010 Advisory Panel.

- Simon Best**, Chief Executive, Institute for Advanced Motorists
- Graham Dalton**, Chief Executive, Highways Agency
- Paul Everitt**, Chief Executive, Society of Motor Manufacturers and Traders
- Robert Gifford**, Executive Director, Parliamentary Advisory Panel for Transport Safety
- Professor David Gray**, Professor of Transport Policy, Centre for Transport Policy
- Stephen Joseph**, Executive Director, Campaign for Better Transport
- Luke Jouanides**, Senior Policy Advisor, Transport, Confederation of British Industry
- David Leibling**, Consultant
- Amy Naphine**, Technical and External Affairs Officer, Chartered Institute of Highways and Transportation
- Tim Philpot**, Vice-Chairperson, Road Safety GB
- David Quarmby**, Chairman, RAC Foundation

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Report author: **Rosanna Spero**  
 Design: [www.milestonedesign.co.uk](http://www.milestonedesign.co.uk)  
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