

Foreword



Sir Brian Shaw
Chairman
AA Motoring Policy Committee

Since the earliest days of motoring, the British have taken their cars to mainland Europe. During 1999, an estimated 8 million people, travelling in 3.5 million cars, will have crossed the Channel on holiday or business. For the Millennium, the AA's *Great British Motorist* report follows them.

Our surveys of transport and travel show up all the ambiguities felt by the British in their relationship with the rest of Europe: so much is the same but there are so many real national differences. They show what we do well – road safety is the shining example – and where we lag behind.

France is the destination for most British motorists. A generation ago, the British motorist made derogatory remarks about the quality of French roads. They squeezed the last expensive drops of lower grade French fuel from their tanks on the drive to Calais and then queued to fill up as they came off the ferry at Dover.

Today the picture is reversed. Britain has the most expensive fuel in Europe and the fill-up is on the French side. And the trip to and from the British Channel ports will be characterised by roadworks and hold-ups on Western Europe's most congested roads.

What is true on the roads is just as true for rail. The Eurostar from Paris or Brussels cuts its travel speed in half as it enters Britain. The missing high-speed rail link between London and Ashford will be at least a decade late in arriving. Planning and transport finance systems have shown themselves incapable of delivering key transport upgrades whatever they are – roads, rail, or airports.

The comparison also holds for cities. A generation ago, London Underground could still be talked of as one of the finest and most comprehensive networks in the world. Not today. Its shabby, crowded services are operated with antiquated equipment that frequently fails.

At the root of the problem is the run down in investment. This has affected every link in the chain – poor maintenance, low quality, inadequate capacity, and bad day-to-day management. The government must make a step change in transport investment, and attract the best and the brightest people, if Britain is to get back on track. It needs to put in place a formal, structured programme of workable, value-for-money projects that will tackle the major transport problems and bottlenecks.

The Great British Motorist report has much to entertain. But it has a serious purpose. There are lessons both for motoring and for wider transport policy by benchmarking ourselves with the best in Europe.

Summary

In just a decade, visits from Britain to mainland Europe with a car have doubled to about 8 million people and 3.5 million cars a year. There is great interest in Europe and how the UK compares. *The Great British Motorist* report looks at how British motorists get to mainland Europe, differences in Europeans' driving habits, their travel and their transport infrastructure, and the different concerns European motorists have.

Every year more than one in seven British motorists take their car abroad.

- Summer holiday trips to France dominate these journeys. There are more than 15 times the number of trips to France with a car than to any other country.
- The Channel Tunnel now takes more than a quarter of all motorists going abroad with their car.

Patterns of travel differ across Europe. Some of the key factors affecting them are: how far people live from work; density of population; and the degree of urbanisation in a country.

- The British have the longest commute times in Europe – on average 46 minutes to get to work and back again, compared with a European average of 38 minutes.
- The Dutch live closest to each other, with 376 persons/km², and the Finns furthest apart (15 persons/km²).
- The UK has 240 persons/km², but Scotland has 66 persons/km²; and south-east England has 653 persons/km², getting on for double the Netherlands'.
- Belgium is the most urban country in Europe, followed by the Netherlands and Britain.

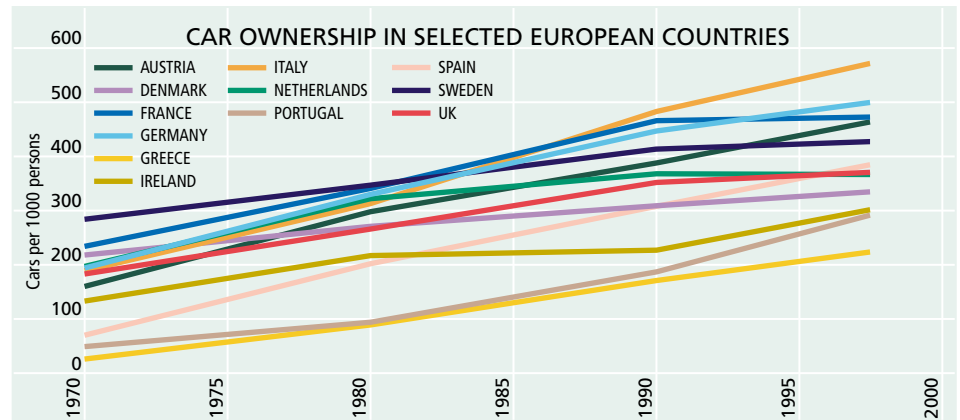
Populations are growing, slowly in most parts of Europe, but faster in others, and generally by 5-15 per cent since the early 1970s. Britain is at the low end of this range. Where there are changes throughout Europe is in the mix of the population, with the population ageing.

- The Swedes and Italians lead the way with proportionally more older people.

Generally, there is a move of populations from the inner areas of cities as people move to the suburbs – 5-15 per cent in many cities in the last 30 years, and more in some others. Some cities, such as Manchester and Zurich, have

retained people in their inner areas.

Car ownership per head of population has been increasing in every part of Europe but the Swedes, Dutch and French slowed down or plateaued in the mid-1990s. Car ownership is strongly linked to prosperity. Historically, any slowing in the growth of car ownership has been linked to recession in national economies.



Car ownership is higher in rural areas than in towns and cities, reflecting the cost and difficulty of parking and easier access to public transport in urban areas. Denmark demonstrates the distortions induced by a high car purchase tax – lower car ownership, and cars used more intensively. Car ownership can also be affected by a reduction in the number of young people reaching driving age.

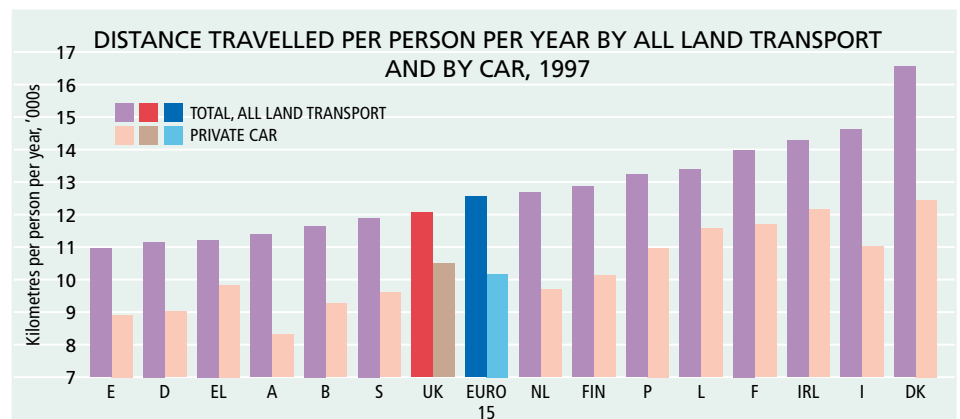
- Car ownership in the UK is low compared with the European Union (EU) average (376 cars per 1,000 persons in 1997, compared with 450).

Transport by road dominates travel throughout Europe (with an average of 12,548 km travelled per person per year by all land-based modes):

- About 80 per cent of European travel is by car, proportionally more by the Greeks, Irish and British (all 86-87 per cent of land-based travel)...

- ...but less by the Austrians and Danes (73 per cent) where the terrain and good alternatives make public transport and cycling attractive.

- British drivers are those most likely to say that their car is extremely or very important to them.



- The Danes and Dutch cycle a lot and the British and several other nationalities very little. It is unlikely that the UK target of doubling cycling by 2002 (compared with 1996 levels) will be met.

- The British make the least use of non-car modes of transport of all European countries.

National motoring stereotypes seem to be borne out by the statistics and by what people say about themselves:

- The Germans reflect their relative prosperity – they have high car ownership, drive comparatively few small cars and are well-insured.

- Many French drivers say they drink alcohol most days, but very little, and 75 per cent say they drive after drinking, but are not above the legal limit.
- Italians are more likely to drive small cars, to drive fast, and not to wear a seat belt.
- Swedes have big cars, use seat-belts routinely, and seldom drive after drinking alcohol.
- The British lie near the average on many measures although they tend towards larger cars (many company-purchased as new), comprehensive insurance and, reflecting a change in attitudes over the last 20 years, almost half say they never drive after drinking. The British are far from complacent – they have one of the best road safety records but also express more concern compared with most other countries about road safety issues.
- Portugal is one of the poorest countries in Europe; its motorists again have relatively small cars.

Motorists show a loyalty to cars manufactured in their own country:

- The French buy Renault (27 per cent of the market), Peugeot (17 per cent) and Citroën (12 per cent). The Italians buy Fiat (33 per cent of the market). The picture is similar in Germany – Volkswagen (21 per cent) and Opel (16 per cent). The Spanish buy SEAT (20 per cent of the market) but there are also large numbers of Renault and Peugeot. The Swedes are loyal to the Volvo (24 per cent). It dominates the market to a degree comparable with Fiat in Italy. The British buy Ford (20 per cent), Vauxhall (14 per cent) and Rover (11 per cent), together with Japanese makes (13 per cent).
- In the Netherlands, Denmark and Switzerland where there is less indigenous manufacturing, Ford, Volkswagen, Opel/GM and Japanese manufacturers lead the market.
- The British pay more than the rest of Europe for most of their cars.

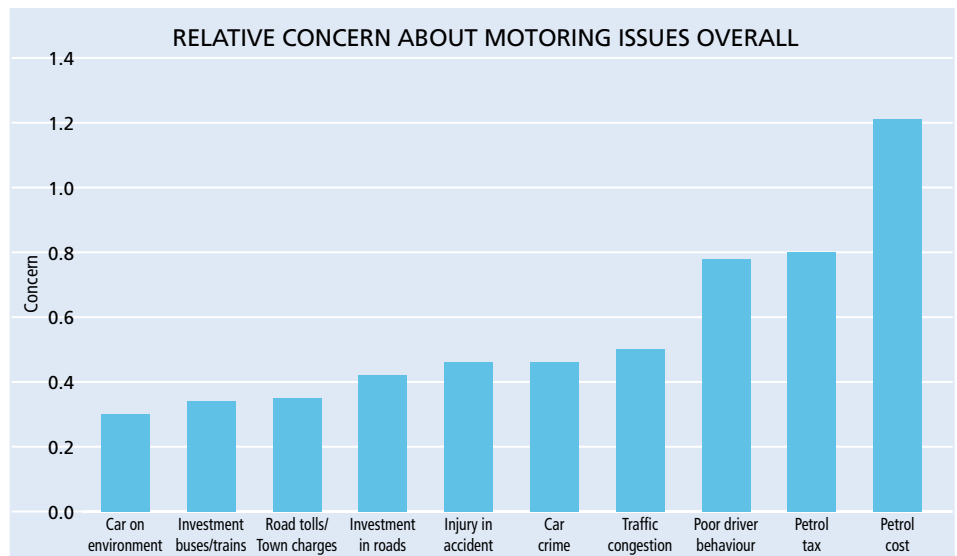
There is variation in some of the negative effects of the car between country:

- The British, Icelanders, Norwegians and Swedes enjoy the safest travel in Europe, but the British suffer most car crime.
- From the figures that are available, the accident risk per vehicle kilometre in Portugal is particularly high – almost four times that in Britain.
- Parts of Britain's national road network are more congested than anywhere else in Western Europe.

Some of the environmental effects of road transport such as noise, vibration, and pollutants vary considerably from place to place, as do the approaches taken to treat them. For example:

- Pollutant levels in Athens and other hot, still southern European cities such as Milan and Turin are often double those in similarly-sized cities in the UK.

Motorists in six European countries were asked to rank their concerns from a list of 10 issues known to worry UK motorists: fuel costs; government tax-take from fuel; the lack of investment in roads and (separately) public transport; car crime; traffic congestion; the poor driving behaviour of other drivers; proposals for paying to use roads; the effect of the car on the environment; and the risk of being injured in a road accident. 4,168 motorists in Germany, France, Italy, the Netherlands, Spain and Britain were questioned.



- The cost of petrol or diesel features highest as a concern, followed by the amount of tax taken by government and the poor behaviour of other drivers. 49 per cent of all motorists rank fuel costs in their top three concerns.
- Of the 10 issues, motorists are least concerned about the effect of the car on the environment. Only 15 per cent rank the effect of the car on the environment in their top three concerns.
- The Germans are those most concerned (relative to other concerns) about the cost of fuel, followed by the French. 85 per cent of German motorists (and 56 per cent of French) rank the cost of fuel in their top three concerns (compared with 45 per cent of British motorists). The Germans, French and British are those most concerned about the level of tax-take in fuel.
- The British are those most concerned about the lack of investment in both roads and public transport. 26 per cent of British motorists rank investment in roads in their top three concerns (compared with the average of 19 per cent).
- The Dutch are those most concerned about the behaviour of other drivers. 60 per cent of Dutch motorists rank the behaviour of other drivers in their top three concerns (compared with 24 per cent of British motorists).
- The cost of fuel is more of an issue in rural areas across Europe than in urban areas. 55 per cent of motorists in rural areas rank the cost of fuel as one of their three main concerns (compared with 44 per cent in urban areas).

There are differences within Britain and within other countries:

- The Scots are concerned about lack of investment in roads and about proposals for paying for the use of roads. 40 per cent of Scots motorists rank proposals to charge for the use of roads in their top three concerns (compared with only 18 per cent in Britain as a whole).
- In London there is concern about lack of investment in public transport and about the effect of the car on the environment. 33 per cent of motorists in London rank the effect of the car on the environment in their

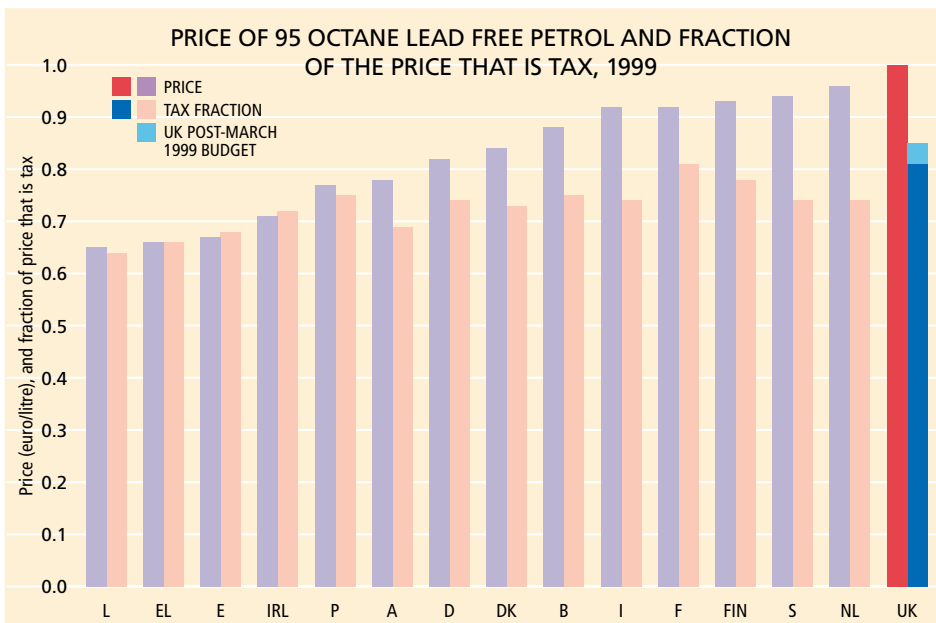
top three concerns (compared with 16 per cent in Britain as a whole, 26 per cent in Paris, 19 per cent in Madrid and 8 per cent in the cities Amsterdam/Rotterdam/The Hague).

- Compared with Parisians, Londoners show a greater concern over lack of investment in both roads and public transport and about car crime.
- 63 per cent of motorists in the Amsterdam/Rotterdam/The Hague areas rank concern about proposals for paying for the use of roads in their top three concerns (compared with just 15 per cent in Paris, 13 per cent in London and 11 per cent in Madrid).
- 38 per cent of motorists in the South of Italy and on Italy's Mediterranean islands rank the poor driving behaviour of others in their top three concerns (compared with 33 per cent in Italy as a whole).

There are individual differences across Europe:

- Male drivers are generally more concerned than women about cost issues (fuel prices and tax-take) – 51 per cent of men rank fuel costs in their top three concerns (compared with 47 per cent of women). The comparable figures for tax-take are 41 per cent (men) and 33 per cent (women).
- Women are more concerned than men about the poor driver behaviour of others and the risk of being involved in an accident. 42 per cent of women rank the issue of poor driver behaviour in their top three concerns (compared with 33 per cent of men).
- 57 per cent of motorists under 25 rank the cost of fuel in their top three concerns (compared with 49 per cent of all motorists). Younger motorists are more likely than older motorists to be concerned about the cost of fuel.

Relative to GDP, the most recent figures from the EU show that in 1996 British road-users had the second lowest investment in infrastructure of any European country (only the Danes invest less).



- In 1996 the UK was taxing at the upper end of the European range of overall road taxation. Since then, the UK's unique fuel tax escalator has resulted in the highest fuel tax in Europe and a consequential rise in total tax-take.

- 82 per cent of motorists believe that it is unacceptable that so little of their motoring taxes is invested in roads and public transport.

- In 1999 the British motorist paid the highest price for petrol and diesel in the EU.

BENCHMARKING WITH MAINLAND EUROPE

In many areas of transport, the UK does not do things as well as its EU partners. Road safety is an exception, but there is still huge scope to reduce deaths and casualties. Action is needed to overcome the UK's motoring and transport problems to meet the concerns of motorists identified in this study.

- The UK has taxed high and invested low. It must invest at the same level as the rest of Europe if the transport system is to be made as good – typically double today's annual amount of £6 billion.
- The UK's fuel tax escalator, introduced under a "green" cloak to raise revenue, must be scrapped immediately.
- Road tolls, collected by a private company or independent authority, are broadly tolerated across Europe where it is clear that the money raised is flowing directly into the provision of *new* roads, bridges and tunnels. No country in Europe has implemented a system of road pricing that manages the demand for roads by matching it to the supply available. Government must re-build the trust that what motorists pay will be spent on better roads and transport.
- There is no need for the UK to have the worst car crime rate in Europe. Improving enforcement, securing car parks and increasing motorists' awareness of how to protect themselves will help. Manufacturers must continue to make their vehicles more secure.
- UK private buyers pay more for new cars than others in Europe. Privileged exemptions from full competition for manufacturers and dealers expire in 2002. If a new exemption deal does not bring clear advantages to the consumer, the exemption must be scrapped.
- First to industrialise, the UK has been a leader out of industrialisation. The subsequent decentralisation goes some way to explaining the UK's long commute times and low patronage of public transport. Measures to counter land-use planning that reinforce unnecessary car use must be further developed.
- Upgrades to the UK's roads and transport system take generations and what is then delivered is often far less than originally conceived. The proper debate and consultation on what needs to be done must be followed by clear, realistic investment decisions on what to implement by when. Programmes must take no more than 5-7 years to deliver.
- Successful European transport systems typically have an enabling strategic authority that oversees the total roads and transport service and commissions services from service providers. In London, the Mayor's electoral authority must be harnessed to reverse chronic road and transport decline and demonstrate a better way forward that can serve as an example to the rest of the UK.
- The UK has invested too little in quality modes of transport to make them attractive alternatives to the car. Better public transport can and should carry more of the transport strain but it can only reduce the amount of *overall* travel by car at the margin.
- The UK is poorly served by major roads and motorways and many are overcrowded. Traffic management, bypasses, improved links to the regions, targeted widening (using tunnels where there are pressing environmental constraints), and priority lanes where they are justified (but they must be additional, not replacements) offer solutions.
- Toxic emissions are falling as a result of better technology and ever-tightening regulations. The UK must raise awareness of the importance of vehicle maintenance in reducing toxic emissions, take enforcement action against wilful gross polluters, advocate yet further tightening of heavy diesel regulations in the light of technological development, and seek fair and efficient ways to scrap the oldest, most polluting vehicles.
- Car manufacturers must fulfil or exceed their important agreement with the European Commission to develop and sell ever more fuel-efficient vehicles and meet the motorists' proportionate share in the reduction of "greenhouse" emissions.
- The best of European streetscape design, particularly that providing for pedestrians and cyclists and treating noise, should be adopted.
- Although many other parts of Europe do not generally have the traffic density and congestion encountered in the UK, many have more technology to manage incidents and congestion. The UK must adopt and implement European best practice.

To mainland Europe!

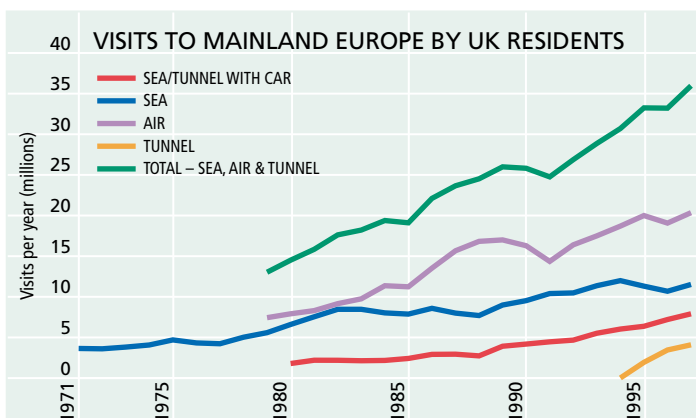
Since the birth of motoring, British motorists have been taking their cars to mainland Europe. The amount of travel to Europe by all means of transport has increased greatly in the past 15 years, and travel to Europe with a car has increased as part of this trend.¹ About three times as many British motorists take their car to Europe as European motorists bring their car to the UK.

- Since 1990, visits to Europe with a car by UK residents have doubled to about 8 million people and 3.5 million cars a year. Increasingly, if people go by ferry, they take the car.
- Surprisingly, 85 per cent of British motorists never take their car abroad. Those most likely to do so are aged 35 to 54: about 20 per cent of motorists in this age group take their car abroad. Trips once or twice a year are most common by people aged 45 to 54, but more frequent trips are made by the 55 to 64-year-olds who do travel – the young retired.
- About a third of all trips to Europe were made in June, July and August – the summer period predominates. About 45 per cent of all trips are made by two adults with no children; around 30 per

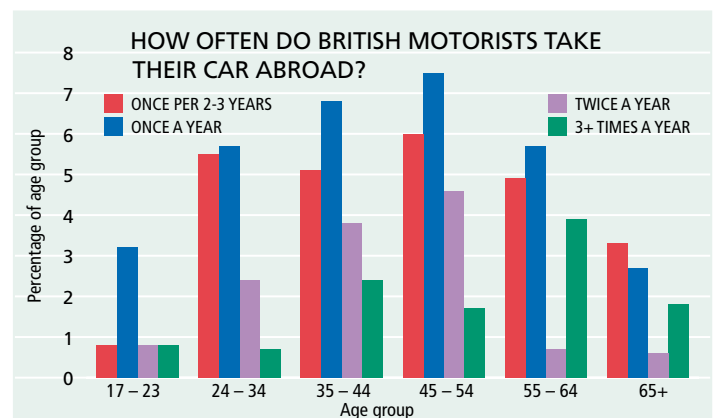
cent of trips include children.

- France has always been the country most often visited as an end-destination, and almost all the growth in the past 20 years in visits to Europe by British motorists with their car has been to France (many of the recent visits have been short and shopping-related). In 1997, 80 per cent of all visits to Europe with a car were to France.
- Visits to Europe by sea, and by sea with a car, are mainly for “independent holidays”. Visits for business, to visit friends and on inclusive tour holidays are mainly by air. Half of all visits by sea were for independent holidays or to visit friends.
- In 1998, almost a quarter of trips to Europe with a car were day trips. 10 per cent were short trips of one or two nights, with the majority lasting three to 14 nights. For motorists resident in London and south-east England, 37 per cent of trips to Europe were day trips.
- Just as France dominates destinations for British travellers to Europe, the ferries from Dover and Folkestone, and the Channel Tunnel, dominate how motorists prefer to cross the channel.

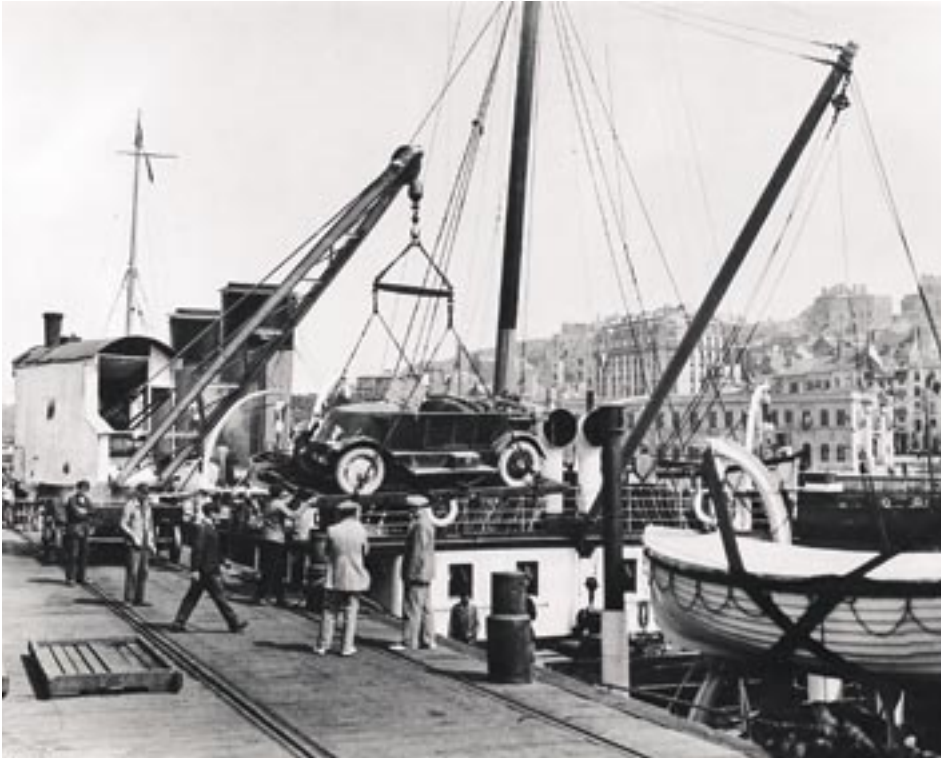
¹ Sources and references to text and charts are provided on pages 44-46.



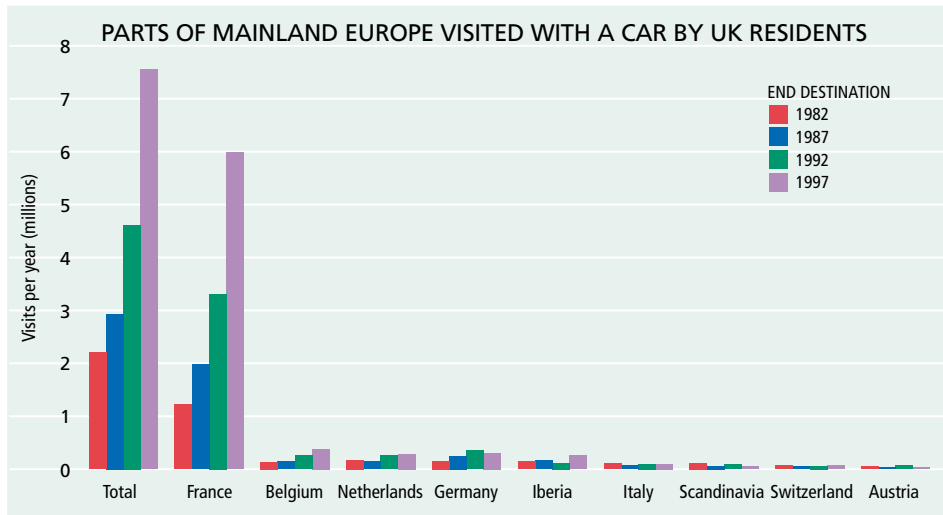
Consistent growth in travel by air, sea and tunnel



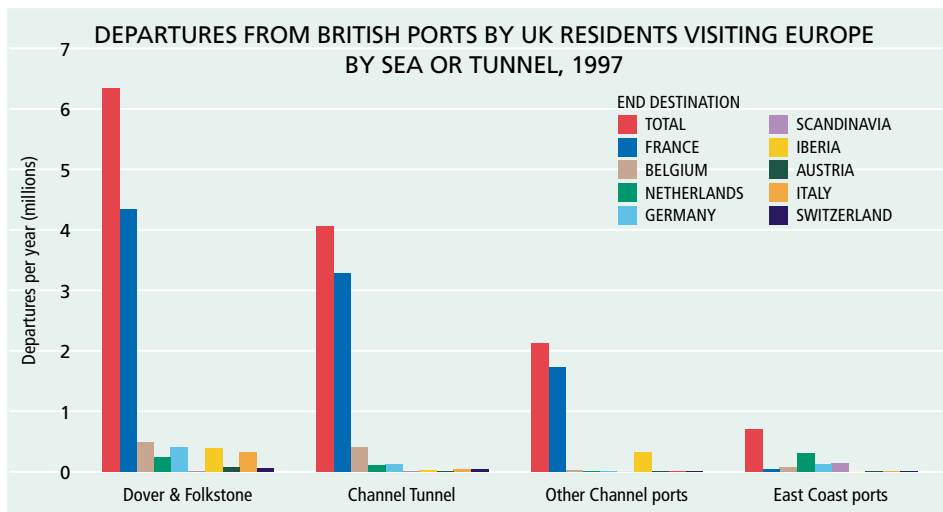
The pattern varies by age group, but the annual trip abroad is common



France: Boulogne in 1925 was very different from today's roll-on, roll-off ferry or the 20 minutes it takes in the Channel Tunnel



Travel abroad has increased, but most motorists only get as far as France



Dover or Folkstone to France – the typical journey to mainland Europe

Happy motoring:

“What started as the prerogative of the rich and the status seeker is now available to all. Most of all, the motor car has made this possible. We may reflect on the motoring pioneers with polite amusement, but without them the motoring holiday today would be very different.

...wherever you travel you will find road improvement schemes. The new highways of the world are taking shape, and one day no corner of the globe will be too remote for the adventurous motorist.”

Co-driver: the AA motorists' companion. The Automobile Association, Fanum House, London, 1965.



Le Shuttle: a major contribution to the cross-channel growth of the past decade

Geography and road links



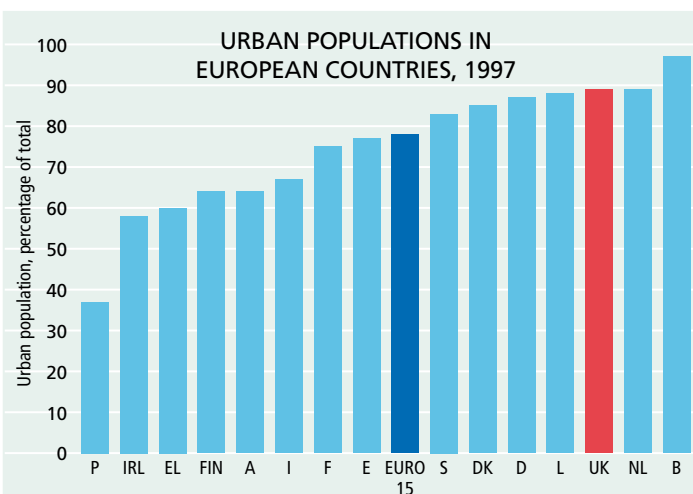
Denmark: every country has its open spaces but most people in Europe live in towns

Despite the diversity of Europe, similar developments, changes and trends occur in most countries. Cities develop suburbs, and in many, but not all, the populations of the inner areas fall. The populations are ageing. Average household sizes get smaller. In countries with sizeable rural populations, people move to the towns. Jobs in mining, agriculture and manufacturing are declining, while jobs in service sectors are expanding. Companies are becoming continental or global. Most cities have a McDonald's restaurant, many have a Hilton hotel or a Benetton store.

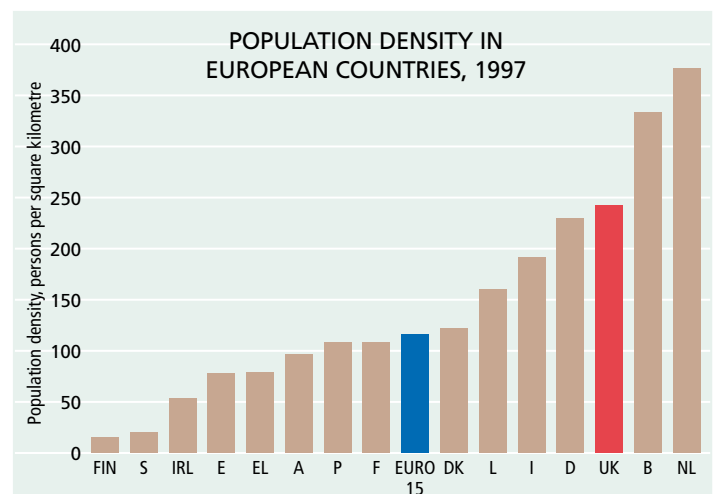
- Some of the similarities are the result of increasing car ownership. Cars require a standard of roads which look much the same everywhere to the lay eye – although often these have a different driving “feel”. Travel means people experience shops and services that are available elsewhere, and leads to each country importing popular aspects of other cultures.
- Across Europe, most people live in towns. But there are big differences between countries in the percentage of

people who are urban (and possibly some differences in definition of “urban” between states). Belgium is most urban, with 97 per cent of Belgians living in towns and cities. Portugal is the least – only 37 per cent live in urban areas.

- Even with the large rural areas of Scotland and Wales, the UK is one of the more urban countries.
- Population density varies greatly between countries. Not surprisingly, the Netherlands is the most densely populated of the 15 countries in the European Union (EU), with 376 persons/km²; Finland is the least, with 15 persons/km². The UK and Germany have almost the same population density, about 240 persons/km². But most of Europe is much less crowded than the UK. France has less than half the population density, and this is immediately apparent in the wide, empty landscapes and uncrowded roads.
- Comparing the length and quality of the road network in different countries is difficult because administrative descriptions do not necessarily reflect the situation encountered by the



More than 80 per cent of the population is classified as urban in seven states



The Netherlands is about 17 times more densely populated than Finland



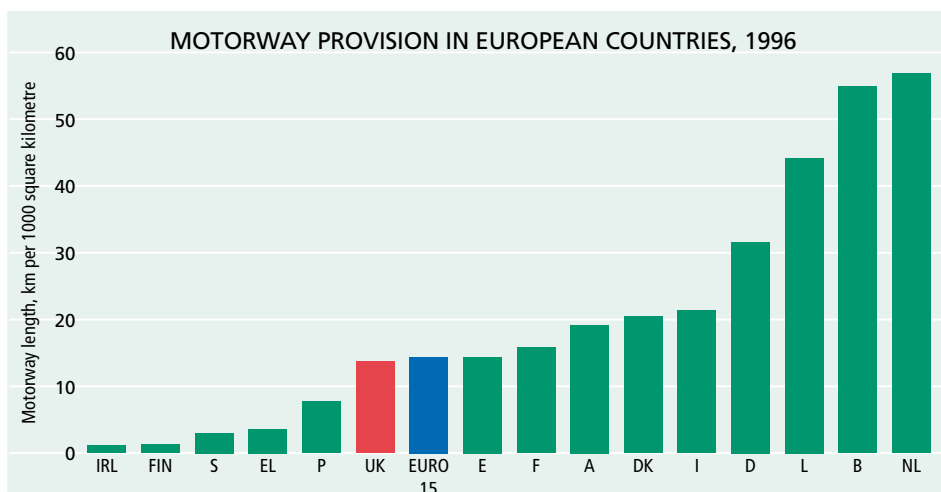
France: a large relatively empty country but the cities are densely populated. This pattern affects both urban and inter-city travel

motorist. In the UK and France, there are many miles of dual carriageway trunk and national roads that are not built to full motorway standard – for example, without either hard shoulders or split-level junctions. In the UK these roads carry high traffic flows.

- The countries with the greatest population density also have the greatest density of motorway (kilometre of road per square kilometre of land). France and Spain have more motorway than might be expected but the UK has less than the European average despite its population density. Germany and the

Benelux countries, at the crossroads of Europe, have well developed motorways catering for transit traffic. Finland and Sweden have little provision, but they are on the edge of Europe with low population densities.

- If motorway loading is viewed in terms of volume of traffic per unit length of road, the UK has very low “levels of service”. UK motorways carry very high volumes, with accompanying congestion, on larger parts of the network for longer periods than the rest of Europe. For example, most average flows in France are about a third of those in the UK.



Many European countries have more motorway per area of land than the UK

Government says it wants a world-class transport system...

“A modern transport system is vital to our country’s future. We need a transport system which supports our policies for more jobs and a strong economy, which helps increase prosperity and tackles social exclusion. We also need a transport system which doesn’t damage our health and provides a better quality of life now – for everyone – without passing onto future generations a poorer world.”

A New Deal for Transport: Better for Everyone. The Government’s White Paper on the Future of Transport, July 1998, p22.

...but will it provide the means?

“The Department should clarify the role of its targets. Too many are ‘aspirational’. Too often they are invented without sufficient thought and rejected if they seem too difficult to meet.”

House of Commons Environment, Transport and Regional Affairs Committee Fifteenth Report, Departmental Annual Report 1999 and Expenditure Plans 1999-2002, July 1999, para. 14.



Germany: in today’s global markets this scene in Berlin could be anywhere

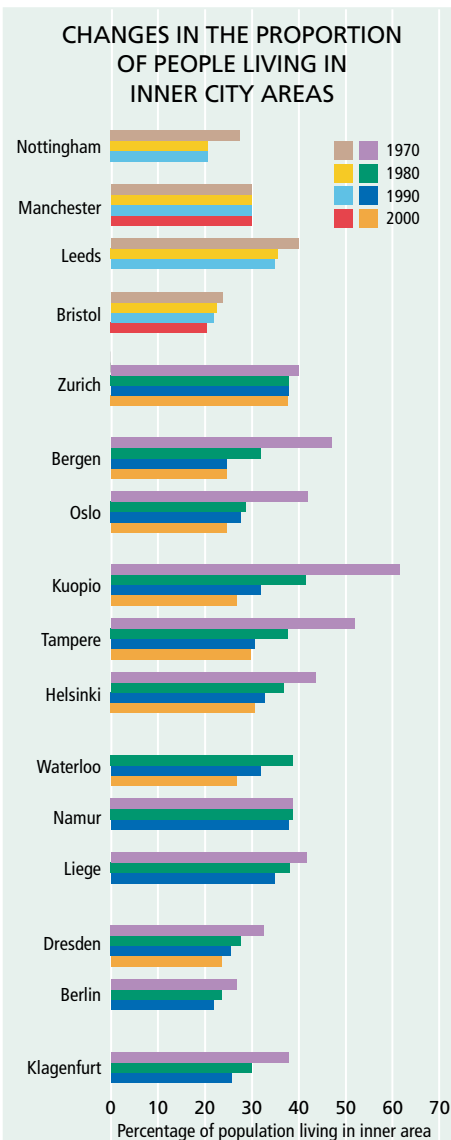
Populations and cars

With a population of 59 million, the UK has about 16 per cent, or one in six, of the people of the EU's 15 member states.

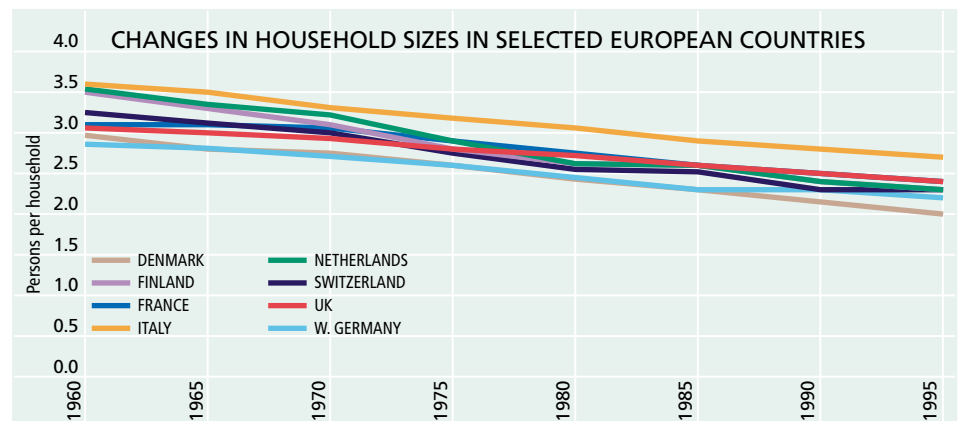
- Through most of Europe, populations are growing but some more slowly than others. Europe as a whole increased by 10 per cent between 1970-1997, UK 6 per cent, Germany 6 per cent, Italy 7 per cent, Austria 8 per cent, Spain 16 per cent, France 15 per cent. By 2020, Germany, Italy and Spain are forecast to be losing population. In all European countries, the sizes of households are reducing. There are major implications for car ownership levels as more people live alone, and more older people and more families break up into smaller units.

- Populations are ageing everywhere. In the UK, 16 per cent of people are aged over 65; by 2008 there will be more people over 60 than children under 16. Ireland has a particularly young population, while Sweden's and Italy's are particularly older ones. The numbers of very old people, aged 80 and over, are forecast to increase fastest of all.

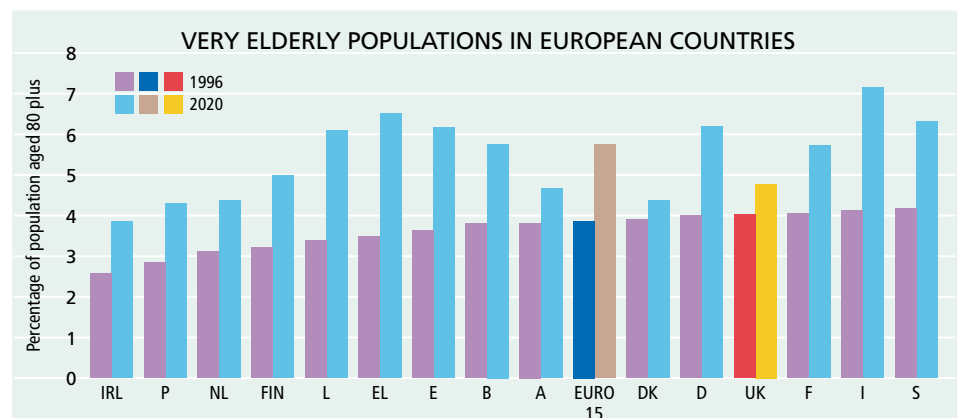
- There is a range of prosperity across Europe. Greece, Portugal and Spain have appreciably lower GDP per person, with levels 68 to 78 per cent of the European average in 1997. The UK, Irish Republic, Sweden and Finland are about average, with values of 97 to 101 per cent of the average. Belgium, Denmark, Germany, France, Italy, the Netherlands and Austria are a little higher, with GDPs per person



Some cities buck the trend, but generally people are moving out



Households are getting smaller, but most will still want a car



The UK's population: old compared with Europe now, but younger in comparison by 2020



Italy: an ageing population that is the second-oldest in Europe; and is projected to be the oldest within the next 20 years

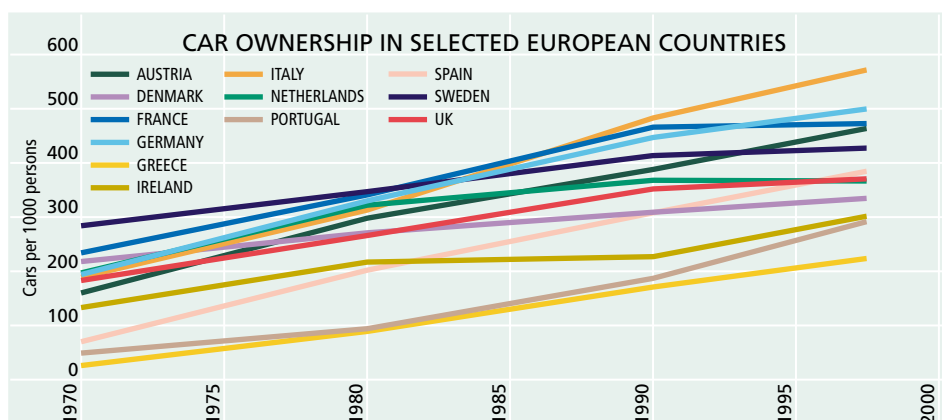
of 103 to 116. At the top is Luxembourg, with a GDP per person 1.65 times the European average for its 300,000 people.

- In most of Europe, cities have been losing population from their inner areas as people move to suburbs, sometimes to get space to keep a car. But some, for example Zurich, have retained people in the inner area of the city. In London and Dublin the population is increasing in some parts of the inner city.

- Generally, people get cars as soon as they can afford them. There are more young, older people and women driving. In every country in Europe car ownership has been increasing, but it slowed in

some in the 1990s as economies faltered due to the tough financial disciplines aimed at enabling European economic convergence following the Maastricht Treaty.

- Car ownership in Sweden, which was the highest in Europe in 1970, peaked in 1990, fell until 1994 and has since risen a little; the same fall since 1990 has occurred in Finland. In France, car ownership has been almost static since the early 1990s, and in the Netherlands it has fallen in recent years. But in every European country except Finland, including those where car ownership had been falling, it rose between 1996 and 1997.



Recession, the number of new drivers, taxation and much else affect growth

It was ever thus:

“Television-sets and washing machines may for the time being take precedence in the hierarchy of domestic needs, but as a longer term objective it is questionable whether anything is so much desired as a family car.”

Traffic in towns. Reports of the steering group and working group appointed by the Minister of Transport, 1963, p10.

More women driving:

“...car ownership and driving among females is expected to become closer to that now shown by males.

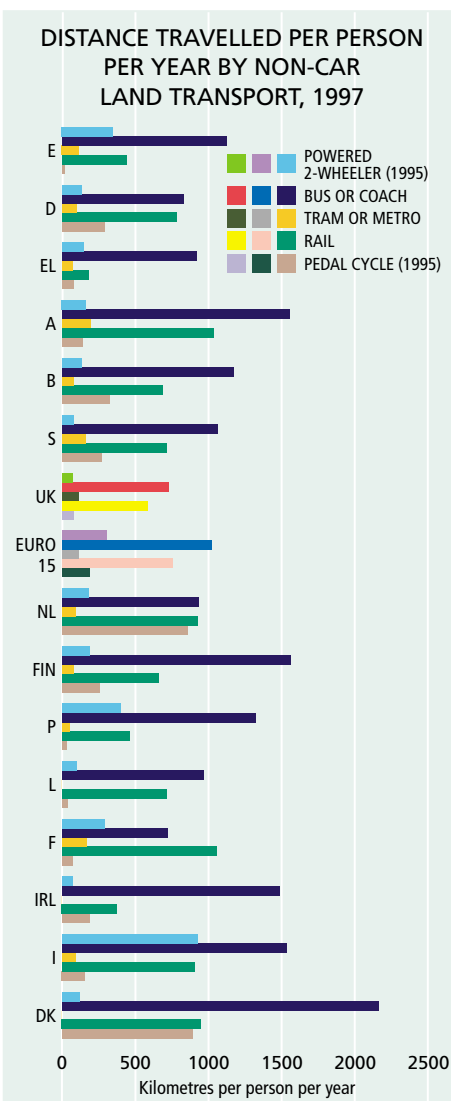
...car availability and car use increase with income.”

DETR National Road Traffic Forecasts (Great Britain) 1997.



Ireland: a vibrant economy and a young population to enjoy it

Transport use in Europe



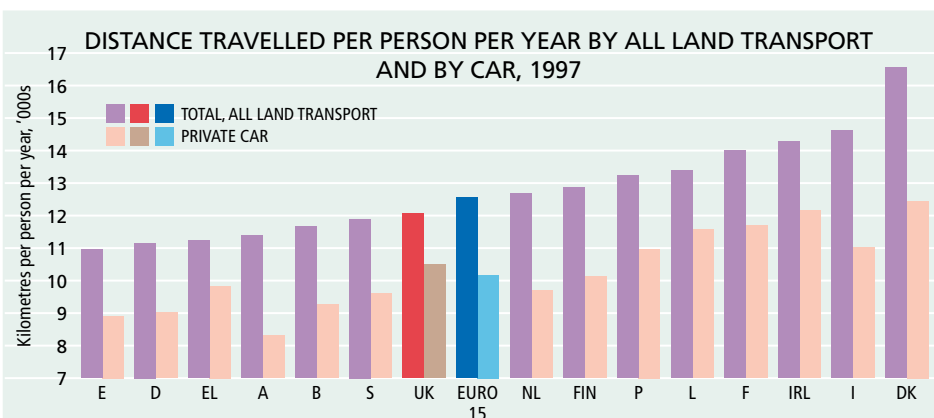
The UK is bottom of the league for the combined total travel by public transport and bike

Road transport is dominant throughout Europe. On average, the total distance per person per year travelled by land transport is 12,554 km. Of this distance, 10,173 km (81 per cent) is by car. But there are big differences between the use of cars, buses, bicycles and other forms of land transport in different countries.

- The average distance travelled by people in Denmark (where a very large proportion of Danish women are in work) is more than 16,000 km. The average distance by car in Denmark is more than 12,000 km, despite car ownership being only 340 cars per 1,000 people. High purchase tax on cars in Denmark may distort the pattern of normal car usage. The average distance travelled by Austrians is 11,400 km, of which 8,312 km is by car. In Spain, Germany and Greece, the average distance travelled is about 11,000 km and the distance by car 8,913, 9,030 and 9,833 km respectively.
- Use of the non-car land modes varies greatly between countries. Powered 2-wheelers account on average for more than 900 km per person travelled in Italy, almost 10 per cent of the distance travelled by car. In no other European country do they contribute more than

400 km. Bus and coach travel accounts for over 2,000 km per person in Denmark and over 1,500 km per person in Italy, Austria and Finland; in France the figure is just over 700 km per person, and in the UK 730 km. Rail is used a lot in Austria, France, Denmark and Italy. Metro and tram are used particularly in Austria, France and Sweden. Cycling makes a substantial contribution in Denmark and the Netherlands. The UK makes the least use of non-car forms of transport.

- The distances people travel, and the types of transport used in different countries, reflect the pattern of land development in different countries. For example, because of its terrain, development in Austria lies in corridors along valleys. Linear development can be well served by bus and train and they are well-used in Austria. The Netherlands has high population density and a longstanding policy to plan developments accessible by public transport. Even so, the Netherlands has only moderate use of bus and train – it is the high use of personal transport, the bike, that stands out. Greeks make little use of non-car forms of transport. In a country where taxi fares are low, even buses are only used half as much as the average for Europe. Car-use in the UK is close to the European average. But it is the use of pedal cycles and powered 2-wheelers that is particularly small.



Great variation in the amount of travel, with the UK close to the average, but proportionally more by car

- The average length of time it takes to get to and from work in any country is determined by many factors – the flexibility of the labour market and willingness to travel, where jobs and homes are, and the quality of the transport system. Commuting time varies substantially between countries. The average for Europe is a total of 38 minutes (to and from work) per day,

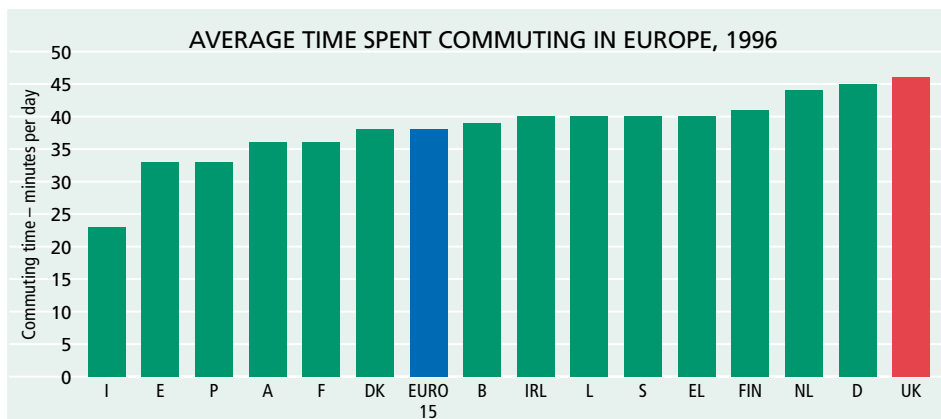


France: the TGV is a flagship for investment in comfortable high speed rail between major cities and to other parts of Europe

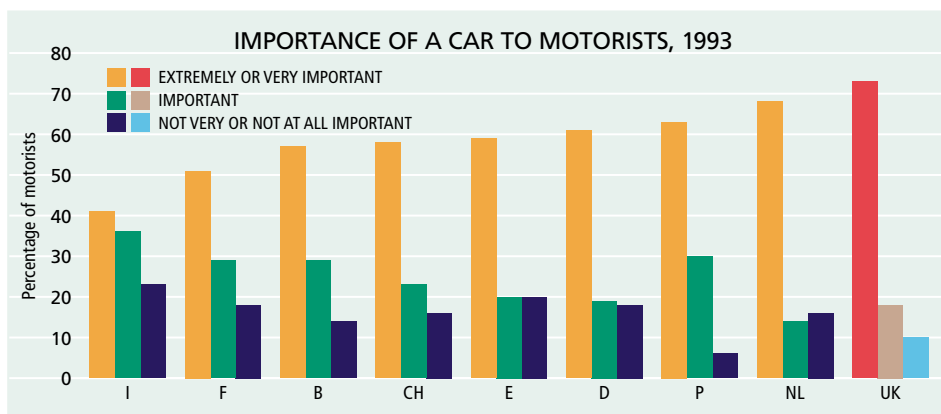
but it varies from 23 minutes in Italy to 46 minutes in the UK, the longest commuting time in Europe. In Greece, 9 per cent of workers commute for more than two hours a day, with Portugal, the

Netherlands and the UK not far behind.

- The British and Dutch are those most likely to say that their cars are "extremely or very important" to them.



The UK's commuters travel longer than others



Very few motorists anywhere say that the car is unimportant

Why we use the car:

"Increasingly, people do not have real choices. For many people using a car is now no longer a choice but a necessity. Nowhere is this clearer than in the rural communities with no daily bus service. For those who rely on public transport it is all too often inadequate, suffering from declining standards and services."

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p12.

"But people will not switch from the comfort of their cars to buses that are old, dirty, unreliable and slow. Too often buses have been treated and seen as 'second class' transport. It doesn't have to be like this and it is certainly not the case in many other European countries."

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p40.



Italy: the powered 2-wheeler is almost a way of life

Drivers' choices and attitudes

TOP FIVE CARS PURCHASED IN GERMANY, 1997

1. VW Golf/Vento	289,182	8.2%
2. Opel Astra	199,254	5.4%
3. Opel Corsa	142,750	4.1%
4. VW Passat	141,092	4.0%
5. Opel Vectra	140,964	4.0%

TOP FIVE CARS PURCHASED IN FRANCE, 1997

1. Renault Mégane	143,821	8.4%
2. Renault Clio	119,844	7.0%
3. Peugeot 306	96,509	5.6%
4. Renault Twingo	82,315	4.8%
5. Peugeot 106	81,757	4.8%

TOP FIVE CARS PURCHASED IN ITALY, 1997

1. Fiat Punto	374,670	15.5%
2. Fiat Bravo/Brava	116,974	4.9%
3. Fiat Panda	112,729	4.7%
4. Lancia Y	112,549	4.7%
5. Fiat Cinquecento	101,733	4.2%

The surveys for the European SARTRE project on driver attitudes to road safety, matched to the cars people own in different countries, provide thumbnail sketches of national drivers. Inevitably, there is a potential for stereotyping and caricature, but there are real differences between countries nonetheless. Europe is certainly not a homogenous entity – there are real national characteristics. Some examples:

GERMAN DRIVERS Even with the inclusion of the former East Germany, Germany is a prosperous country, with a GDP/person of 109 per cent of the European average (based on purchasing power). Unemployment in 1997 was 10 per cent; car ownership in 1997 was 505 per 1000 persons, the third highest in Europe. Most German cars have engines of 1,300 to 1,900 cc, with cars of more than 2,000 cc not uncommon. About 80 per cent of adults hold a car driving licence. Four-fifths (79 per cent) of drivers have comprehensive insurance.

- 60 per cent of drivers say they are very concerned about unemployment, 50 per cent about crime and 38 per cent about pollution. Only 28 per cent are concerned about road accidents and 23 per cent about congestion. For three-quarters of drivers, a car is "just a means of transport".

- German drivers are satisfied with the current drink/drive limit (0.8mg of alcohol per millilitre of blood). 80 per cent report that they always wear seat belts in towns, and about 90 per cent on main roads and motorways. 20 per cent are against speed limits on motorways and 30 per cent have been fined for

speeding. Only 2 per cent have been found guilty of drink-driving.

FRENCH DRIVERS France is a prosperous country, with a GDP/person of 104 per cent of the European average, but unemployment was 12 per cent in 1997. Car ownership, at 478 per 1,000 persons, is above the European average. About 73 per cent of adults hold driving licences for cars. Most drivers have fully comprehensive insurance.

- 67 per cent of drivers report that they are very concerned about unemployment, 41 per cent about pollution and 40 per cent about crime. 46 per cent are very concerned about road safety and 26 per cent about congestion. 80 per cent always use seat belts in town and 90 per cent on main roads and motorways.

- Many drivers say that they drink most days, but very little. They say they often drive after drinking, but are not above the legal limit (0.5mg/ml adopted recently). They consider French drivers respect speed limits, and only 9 per cent have been fined for speeding, but they think limits should be higher on motorways.

ITALIAN DRIVERS Prosperity in Italy is similar to that in France, with the GDP per head 103 per cent of the European average, and an unemployment rate of 12 per cent in 1997. Italy has the highest level of car ownership in Europe, with 577 cars per 1,000 persons in 1997, but the majority are small cars. 14 per cent of cars purchased in 1997 had an engine of less than 1,000 cc. 55 per cent of drivers have only the legal minimum insurance.



France: drivers think that speed limits on motorways should be higher, but they also have a relatively high respect for speed limits

- 59 per cent of drivers say they are concerned about unemployment, 48 per cent about crime and 47 per cent about pollution. Only 39 per cent are concerned about road accidents and 30 per cent about congestion. Many Italian drivers never fasten their seat belts: 53 per cent in towns, 22 per cent on main roads and 12 per cent on motorways. They say they are not very careful when driving, drive fast and often do not use a seat belt, even though they are aware that it reduces the risk of serious injury.

- 40 per cent of drivers say they never drink, 22 per cent drink most days and 12 per cent drive after drinking. 35 per cent never drive when over the legal limit (0.8mg/ml), though 72 per cent expect never to be tested for alcohol. Half would like to see higher speed limits on motorways and main roads, and almost 30 per cent have been fined for speeding in the past three years.

DUTCH DRIVERS The Netherlands' prosperity is similar to that of France, with GDP per head 105 per cent of the European average. Its unemployment rate in 1997 was 5 per cent, one of the

lowest in Europe. Car ownership is 372 per 1,000 people, similar to that in the UK, but has fallen from a peak in 1994. Only 2 per cent of cars have engines of less than 1,000 cc. 68 per cent have comprehensive insurance, but 4 per cent admit to having uninsured cars.

- 41 per cent of drivers say they are concerned about crime, 28 per cent about unemployment and 26 per cent about pollution. 28 per cent are concerned about road accidents and the same percentage about congestion.

- Although many drivers report that they drink most days, half of them drink only one to two units and half never drive after drinking (limit 0.5mg/ml). Most drivers agree with the existing speed limits, but 28 per cent have been fined for speeding.

SWEDISH DRIVERS GDP is slightly lower in Sweden than the UK, at 97 per cent of the European average and the unemployment rate in 1997 was 10 per cent. 83 per cent of drivers live in small towns (2,000 to 100,000 population). About 80 per cent of adults hold car

TOP FIVE CARS PURCHASED IN THE NETHERLANDS, 1997

1.	Opel Astra	25,810	5.4%
2.	VW Golf	20,505	4.3%
3.	Renault Mégane	18,129	3.8%
4.	VW Polo	17,779	3.7%
5.	Opel Corsa	16,417	3.4%

TOP FIVE CARS PURCHASED IN SWEDEN, 1997

1.	Volvo 800	25,972	11.5%
2.	Volvo 900	14,285	6.3%
3.	Volvo S40/V40	11,182	5.0%
4.	Ford Escort	9,089	4.0%
5.	Ford Mondeo	7,645	3.4%

Drivers' choices and attitudes continued

TOP FIVE CARS PURCHASED IN THE UNITED KINGDOM, 1997

1. Ford Fiesta	119,471	5.5%
2. Ford Escort	113,522	5.2%
3. Ford Mondeo	107,239	4.9%
4. Vauxhall Vectra	93,778	4.3%
5. Vauxhall Astra	89,537	4.1%

TOP FIVE CARS PURCHASED IN PORTUGAL, 1997

1. Opel Corsa	20,370	9.5%
2. Fiat Punto	19,832	9.3%
3. Ford Fiesta	14,731	6.9%
4. VW Polo	13,419	6.3%
5. Renault Clio	12,211	5.7%

driving licences, and 77 per cent of drivers have comprehensive insurance. Car ownership was the highest in Europe in 1970, but is now below the average at 419 per 1,000 persons. Ownership peaked in 1990 and then fell to 409 per 1,000 in 1994, from which it has slowly grown again. 36 per cent of cars had engines of more than 2,000 cc.

- Rather few Swedish drivers say they are concerned about social or traffic issues. 34 per cent are concerned about unemployment, 24 per cent about pollution, 20 per cent about crime, 14 per cent about road accidents and 6 per cent about congestion. 82 per cent always use their seat belt in towns and over 90 per cent on main roads and motorways. Drivers are relatively careful and public-spirited while driving.

- Most report that they drink less than once a week and 80 per cent never drive after drinking. Almost none drive while over the legal limit (0.2mg/ml, the lowest in the EU) or have been fined for drink/driving. About 20 per cent of drivers often exceed the speed limit on main roads and motorways, and half of all drivers think the limit should be higher on motorways, but lower in urban areas. Most drivers think their speed is rarely checked and only 10 per cent have been fined for speeding.

UK DRIVERS The prosperity of the UK is close to the European average, with GDP per head at 99 per cent. Unemployment is relatively low, with a rate in 1997 of 7 per cent. Car ownership, at 376 per 1,000 people, is below the European average of 450 per 1,000. 68 per cent of adults hold a driving licence for cars – 81 per cent of all men and 57 per cent of all women.

British cars (often bought from new by companies) are rather powerful, 26 per cent 1,800 cc or more. 78 per cent of drivers have comprehensive insurance.

- 62 per cent of drivers say they are very concerned about crime, 43 per cent about unemployment and 42 per cent about pollution. Despite the UK's excellent road safety record, 47 per cent are concerned about road accidents. 47 per cent (more than anywhere except Greece) are also concerned about congestion.

- About 90 per cent of drivers always use their seat belt in towns, 92 per cent on main roads and 94 per cent on motorways. They say they are careful drivers, and would like to see lower speed limits in built-up areas. They do not like to drive fast. More than half of all drivers say they never drive after drinking. The legal limit is 0.8mg/ml. 7 per cent say they have been fined for speeding.

PORTUGUESE DRIVERS Portugal is one of the poorest countries in Europe, with GDP per head of only 71 per cent of the European average, but the unemployment rate in 1997 was just 7 per cent. Car ownership, at 297 per 1,000 persons, is the second lowest in Europe. The average car in Portugal is small. In 1997, 12 per cent of new cars had engines smaller than 1,050 cc and 55 per cent of all new cars were in the mini or supermini size class.

- Portugal is the most rural of the EU's 15 member states. 36 per cent of drivers came from towns of less than 2,000 inhabitants. About 42 per cent of adults hold car driving licences. 21 per cent of drivers were aged less than 25 years old, and 11 per cent had less than two years



Sweden: Volvo has long been the favourite car of the Swedes and they are relatively careful and public-spirited when driving

driving experience. 57 per cent of drivers have the minimum car insurance.

- 65 per cent of Portuguese drivers say they are concerned about unemployment, 55 per cent about road accidents and 54 per cent about crime. Only 29 per cent are concerned about traffic congestion. 75 per cent of drivers always wear a seat belt in town, 84 per cent on main roads and 89 per cent on motorways. Portugal has one of the worst, if not the worst, road safety

records in Europe.

- More than one person in four drinks most days, and 13 per cent drive after drinking. 40 per cent of drivers are satisfied with the current alcohol limit (0.5mg/ml), but 30 per cent think it should be reduced. 28 per cent of drivers exceed the speed limit on the motorway often or always, and a similar percentage exceed the limits in towns. More than half of drivers want the limit on motorways increased.

AVERAGE AND COMPARATIVE EUROPEAN DATA

Unemployment	11%	Legal alcohol limit	
Car ownership	450 cars/1,000 persons	1 state (Sweden)	0.2mg/ml
Average engine size	approx. 1,600 cc	9 states	0.5mg/ml
Licence holding	54% of total population, about 70% of adults	5 states (inc. UK)	0.8mg/ml
Have comprehensive insurance	62%	Wear seat belts	
Concerned about unemployment	56%	in towns	64%
crime	47%	on main roads	80%
pollution	40%	on motorways	85%
road accidents	39%	Wanted higher speed limits on motorways	42%
congestion	29%	Fined for speeding*	18%
		Found guilty of drink/driving*	1%

*in past three years

Why people choose what they do:

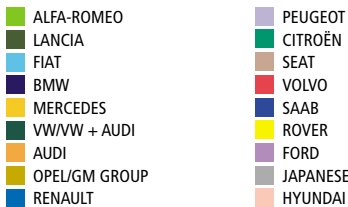
“Individual manufacturers obviously seek to promote the sale of one car rather than another, but I have no doubt that the real reason why people buy cars is because they are such extraordinarily useful and attractive things... it is the sheer convenience of the car that is its own best salesman. We ignore this fact at our peril.”

Professor Sir Colin Buchanan, *Traffic Engineering and Control*, July 1973, pp134-135.



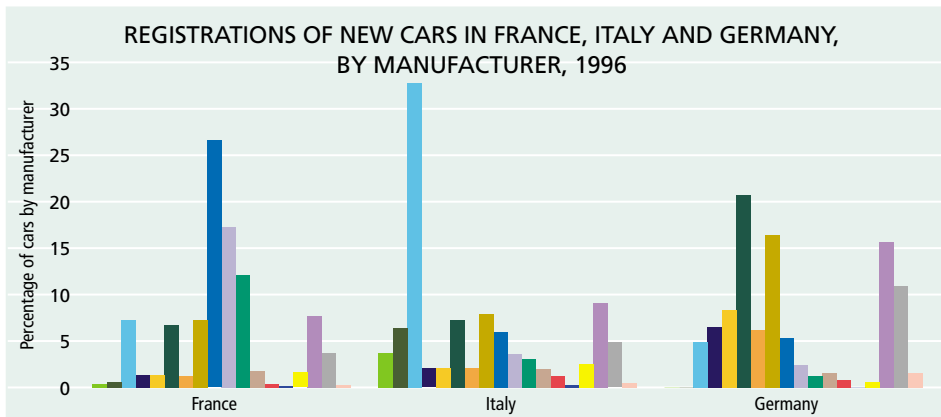
Ford: it is a particular favourite with the British, but it sells well everywhere

The European car fleet

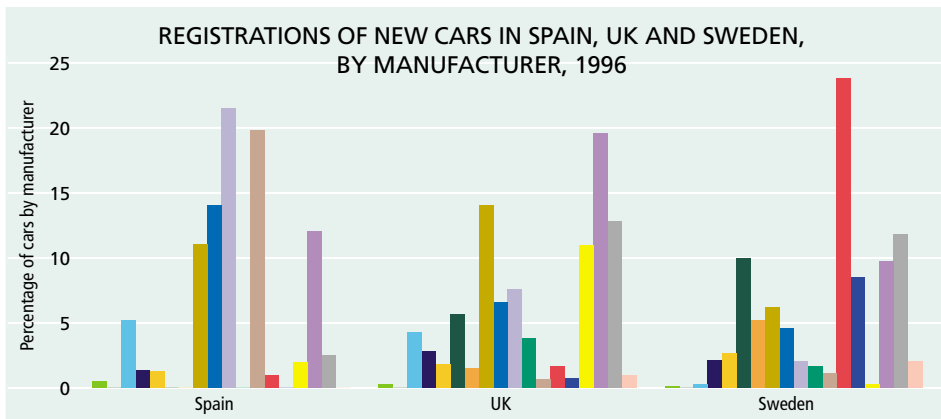


In 1997, there were 168 million cars in the 15 member states of the EU – 450 cars for every 1,000 people, or less than two adults for every car. And in 1996, 13 million cars were produced in Europe. The biggest manufacturer was the VW

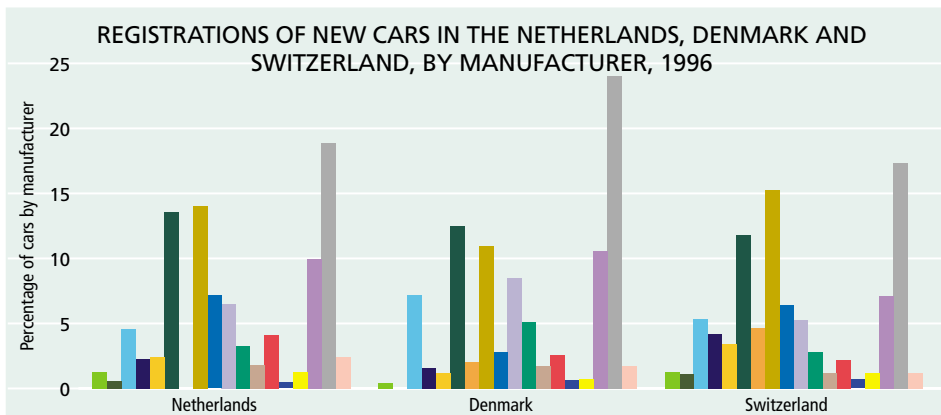
Group, including Audi and SEAT, which produced 2.4 million cars. The next three manufacturers were General Motors (Opel and Vauxhall), with 1.7 million; Ford, with 1.6 million; and Renault, with 1.5 million. The largest far-eastern manufacturer was Toyota, with 117,000 cars, followed by Honda with 106,000.



Home-based marques: led by Renault in France, Fiat in Italy and Volkswagen in Germany



Peugeot and SEAT in Spain, Ford in Britain and Volvo in Sweden



A less pronounced pattern in countries where manufacturing is not so strong

- Where a country has a strong car industry, its citizens buy its cars (even though some of what they buy may be made elsewhere). This is demonstrated by the makes of cars purchased in different countries. Where a country does not have a major motor industry, the cars purchased are more evenly distributed by country of manufacture.

- For many years there has been concern among British motorists that they are paying more for their cars than their counterparts elsewhere in Europe. Differentials are due in part to fluctuating exchange rates (a factor reducing with the introduction of the euro) and the different tax regimes across Europe. However, the issue of whether some manufacturers have pricing policies that improperly disadvantage the consumer is currently being examined by competition authorities. Exemplary fines have already been levied by European authorities against those manufacturers setting prices anti-competitively.

SELECTED EU CAR PRICE DIFFERENTIALS

	UK	Cheapest Country
Ford Fiesta	135.5%	92.0%
Vauxhall Vectra	119.4%	82.6%
Rover 214	161.4%	100.0%
Honda Civic	173.5%	91.8%

100% corresponds to price in cheapest euro-zone country, 1 May 1999; percentages less than this show lowest price is outside the euro-zone

British motorists are paying more and many suspect that they are paying too much



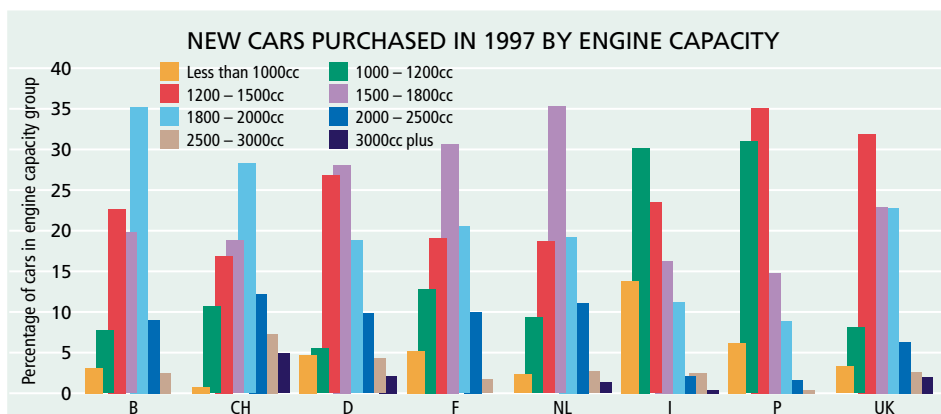
Germany: cars are relatively large, with comparatively few under 1,200 cc

- The size of cars purchased in different countries is different. Cars bought in Portugal and Italy tend to have smaller engines – averaging only 1,340 cc and 1,390 cc respectively. In France, Germany, the Netherlands, Belgium and the UK, cars tend to have medium sized engines – the average sizes are between 1,620 cc and 1,690 cc. Cars in Switzerland tend to have bigger engines – the average size is 1,824 cc.

- Portugal and Italy have high percentages of “superminis”, and Italy has a relatively high percentage of “minis”. Only Denmark and the UK have high proportions of upper medium cars, and France and the UK have the highest

proportions of executive and luxury cars.

- The average age of cars, and so the percentage of the fleet replaced each year, differs in different countries. In Sweden, car purchases in 1996 were one-twentieth the number of cars in the fleet, and in Norway, one-sixteenth. In Ireland, the purchases were one-tenth the number in the fleet. For half the countries analysed the car fleet was 11 to 13 times the number of cars purchased annually. Cars appear to last longest in Mediterranean countries (Spain, Greece and Italy), where little salt is used on the roads, and Norway and Sweden, where the problem of corrosion has long been a priority for Scandinavian manufacturers.



Many small-engined cars in Italy and Portugal; fewer in other countries

Competition?

“...we are concerned that UK car buyers appear to be suffering as a result both of car manufacturers’ wishing to increase their market share elsewhere and of manufacturers’ confidence, well-founded or not, that UK new car buyers will be willing to go on paying over the odds.”

The Trade and Industry Committee (Session 1998-99) on Vehicle Pricing (HC64), para. 17, 8 December 1998.



Britain: coming down in price, but should British motorists be able to save even more?

Road safety and attitudes

There are substantial differences in road safety between the various European member states. The UK and Sweden are the safest countries in the EU, and, with Iceland and Norway, probably the safest in the world. As a driver, the British motorist abroad will be concerned as to how much less safe the roads are. The fact is that the accident data per vehicle kilometre are not even available in some of the least safe countries. The figures for the road traffic deaths per million vehicles, however, show that the risk in Greece and Portugal is probably about twice that in Belgium and almost four times that in the UK.

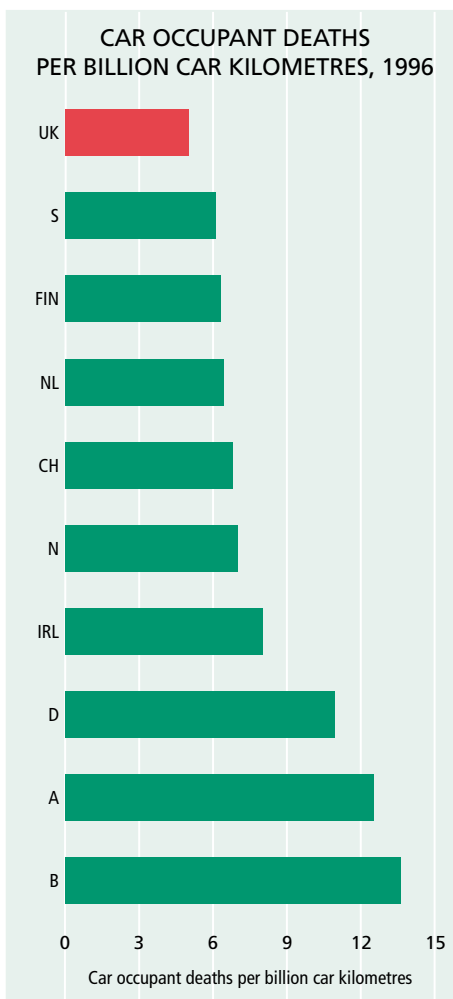
perhaps it is an awareness of road safety that conditions safe behaviour.

- Surveys of drivers' attitudes and behaviour in different countries suggest that these may contribute to some degree towards the differences in accident rates in different countries. For example, 32 per cent of drivers in Greece claim to drive through amber lights often or always, compared with 13 per cent in the UK. But in Belgium, which has a poor record for car-user deaths, only 9 per cent claim to do so.

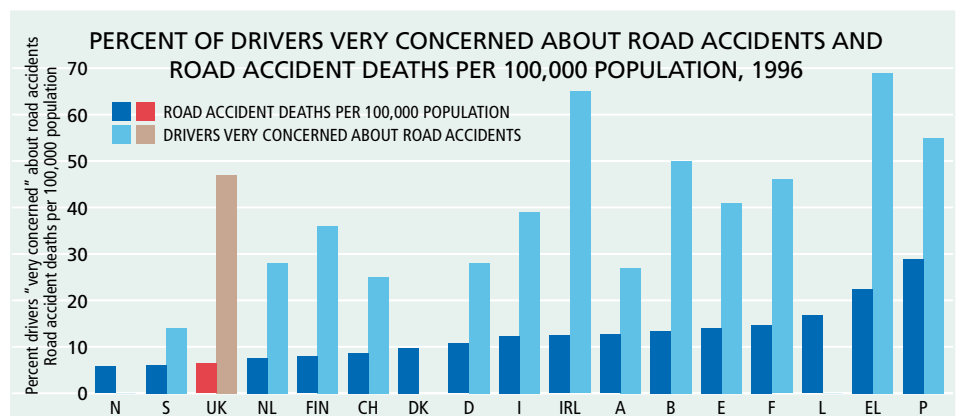
- Attitudes to legislative control of drinking and driving vary greatly between the north and south of Europe. In Greece and Italy, less than a quarter of drivers disagree with the statement "People should be free to decide for themselves how much they can drink before driving"; in Sweden and Finland, more than 80 per cent of drivers disagree. The accident rate in the south of Europe is two to four times that in the north.

- Drivers' reported observance of speed limits varies between countries and types of roads. Drivers said they exceeded the speed limit more often on motorways and main roads than in built-up areas. The highest percentages of drivers

- There are differences in the degree of concern for road safety expressed by drivers in the SARTRE surveys – although to some degree the results are influenced by the likelihood of honest reporting on any given topic. The chart below shows the percentage of drivers "very concerned" about road accidents, and the accident rate for that country, expressed as fatalities per 100,000 population. There is large variation in reported level of concern and little relationship with the real situation. For example, British drivers have a high level of concern despite having one of the safest road systems in the world –



Risk of death per kilometre driven is very low in the UK



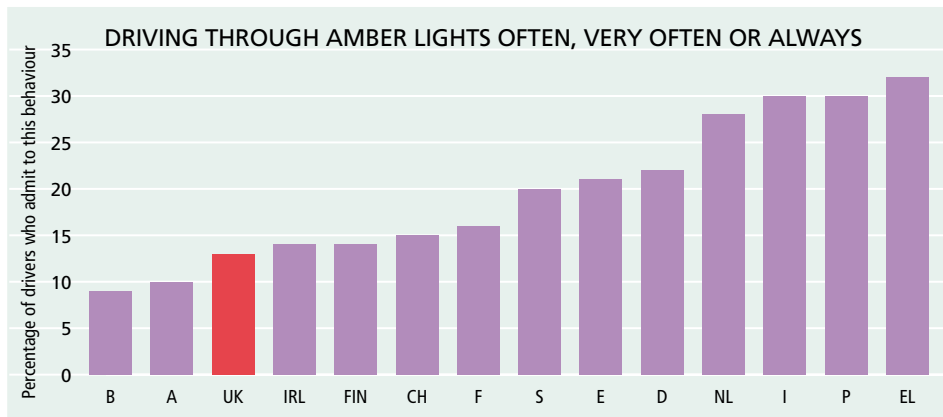
Little relationship between concerns about road accidents and risk of death



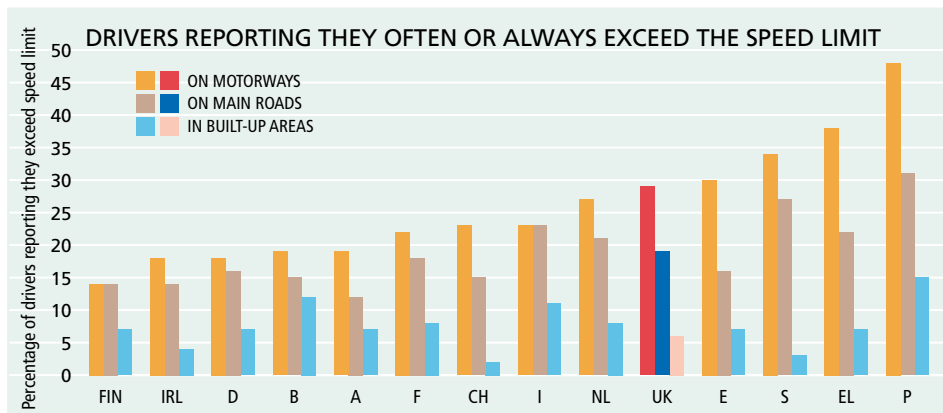
Accidents: all new cars sold in Europe must conform to safety standards and the AA is a founding sponsor of the European crash-testing programme which rates the safety of new cars

claiming to exceed speed limits were in Portugal and Greece, followed quite closely by Sweden, Spain and the UK. In the UK, where 29 per cent of drivers claim to exceed motorway speed limits

often or always, measurements show that on motorways, 54 per cent of cars are exceeding the 70 mph limit and 19 per cent are exceeding the limit by more than 10 mph.



Take special care at traffic lights in Greece, Italy, Portugal and the Netherlands!



On every class of road, Portugal leads the way in speeding

Good, but no room for complacency:

“To improve safety and save lives, action must be taken across a number of fronts – including improvements in the behaviour of drivers, riders and pedestrians; enhancements in vehicle safety; better roads and road engineering; and better enforcement.”

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p82.

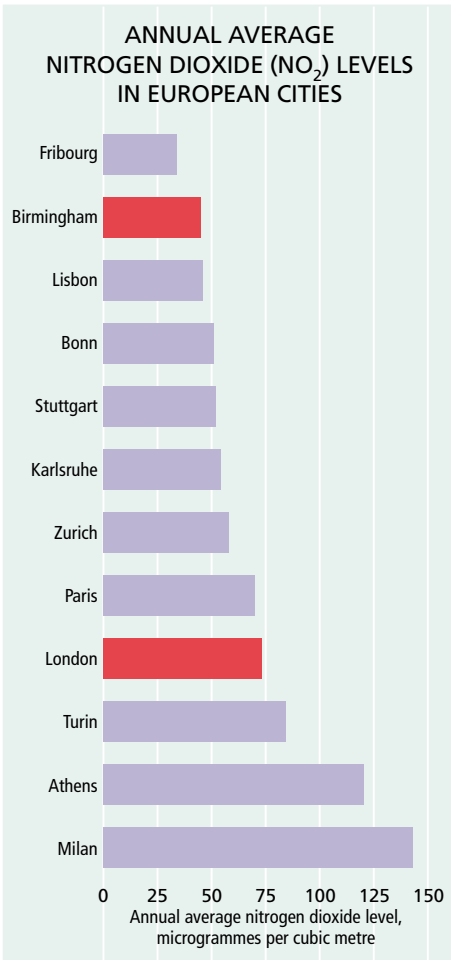
“We wish particularly to improve the safety of more vulnerable road users, including pedestrians (particularly children), cyclists and motorcyclists, in a way that is consistent with encouraging more cycling and walking.”

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p83.

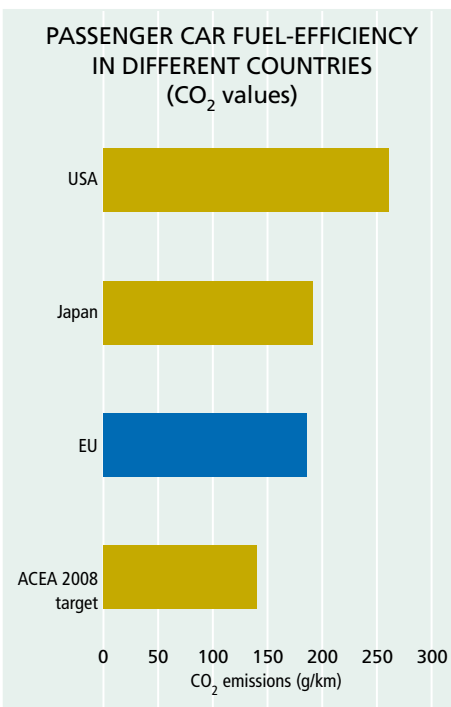


Speeding: most European drivers admit to it, but relatively few say they speed in built-up areas

Environmental issues



Terrain, climate and level of emissions help to determine air quality

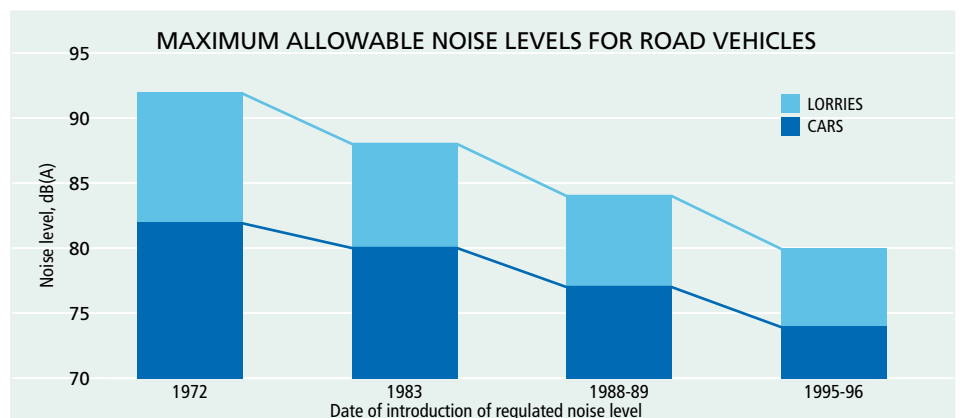


Carbon dioxide emissions from new cars will be cut by a quarter over the next decade

All European countries and the European Parliament and Commission have policies to reduce the environmental impact of transport. The European motoring organisations and motor industry, notably through the manufacturers' body, ACEA, are working with them.

- Road transport: causes noise and vibration; emits pollutants that cause poor local air quality, particularly in cities; emits gases that cause soil and water to become acidic on a regional scale; emits carbon dioxide, which contributes to the "greenhouse" effect that is widely blamed for climatic changes; and causes nuisance, disturbance and fear for people near roads.
- Road traffic is the largest external cause of noise in houses. The number of houses exposed to high noise levels depends on whether dwellings are clustered along busy roads and on whether countries have built bypasses to keep traffic away from where people live. The British motorist in France will often notice quieter road surfaces and the use of larger and more architecturally-developed noise barriers than would be the case in Britain.

- Air quality varies considerably between cities. Cities may also have high levels of one pollutant and low levels of another. For example, London and Paris have relatively high levels of nitrogen dioxide (a slightly brownish gas that irritates the airways), but low levels of ozone (a very reactive gas derived from oxygen, formed by the action of sunlight on air containing a mixture of pollutants). Fribourg has a low level of nitrogen dioxide and a high level of ozone. Athens and Turin have high levels of both. Not only does air quality vary by place, so too does the percentage of cars with a catalytic converter. In 1996 the average for the 15 EU states was 35 per cent. This varied between 16-18 per cent (France, Portugal and Spain), but much less in Greece (possibly a few per cent) to 25-29 per cent (Belgium, Denmark, France, Ireland, Italy, Luxembourg, Norway and the UK) and 50-61 per cent (Austria, Germany, the Netherlands and Sweden). 75 per cent of cars in Switzerland had a catalytic converter.
- There are very few cities in which air quality is not improving. Improvements are partly the result of a reduction in the use of coal for domestic heating, partly a reduction in the amount of heavy industry that emits smoke, dust and various pollutant gases, and partly a



A car in 1972 was allowed to make more noise than the biggest lorry today



Greece: vehicle exhaust emissions in Athens are more likely than most cities to exceed permitted levels for nitrogen dioxide and ozone

result of reducing the amount of exhaust pollutants emitted per kilometre by motor vehicles. For example, in Paris, the concentration of lead dust in the air in 1993 was 5 per cent of that in 1975. For sulphur dioxide (very little of which comes from road traffic) it was only 10 per cent of that in 1960.

- The allowable exhaust emissions and noise levels from vehicles are regulated

by the EU, and have been reduced steadily over time (see page 47), but in some places poorly-maintained vehicles and slow moving buses and trucks contribute to poor air quality.

- The voluntary agreement by car makers will, when implemented, exceed the motorists' proportionate share of the Kyoto agreement on carbon dioxide reduction.

THE RELATIVE FALL IN TOXIC EMISSIONS SINCE 1992
AS A RESULT OF THE EURO STANDARDS
(medium-sized car, urban test cycle)

Fuel		CO	HC	NOx	PM ₁₀
Petrol	pre-Euro I	100	100	100	5
Petrol	Euro-I	15	9	19	2
Petrol	Euro-II	10	4	9	2
Petrol	Euro-III	7	3	6	2
Petrol	Euro-IV	4	2	3	2
Diesel	pre-Euro I	7	10	43	100
Diesel	Euro-I	4	4	29	55
Diesel	Euro-II	3	3	21	31
Diesel	Euro-III	2	2	13	20
Diesel	Euro-IV	2	1	7	10

Many cars in 1992 emitted as much of some toxic emissions as 20 or more cars today

Progress here, and more expected:

“The adoption of tighter European noise emission standards for road vehicles over the last ten years has had a noticeable effect on noise emitted from vehicles in urban areas, but not so far on noise emitted from traffic travelling at higher speeds on inter-urban roads.”

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p136.

“We estimate that European initiatives aimed at tightening vehicle and fuel standards have the potential to reduce busy central urban area road traffic nitrogen oxide emissions by up to 67 per cent and particulate emissions up to 70 per cent below 1996 levels by 2010. Action at the local level...[has] the potential to deliver further significant savings.”

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p35.



France: an enlightened approach to the management of traffic noise

What concerns drivers



Congestion: a worry for motorists in urban areas; drivers in Madrid and Paris are particularly concerned

The AA routinely asks motorists about what concerns them as drivers and users of cars. Issues such as cost, congestion and personal security frequently come to the fore.

As part of the research for *The Great British Motorist* report, drivers in France, Germany, Italy, the Netherlands, Spain and Britain were asked to rank¹ their three main motoring concerns from a list that comprised the cost of petrol or diesel; the amount of tax in the price of petrol or diesel; the lack of investment in roads and (separately) public transport; theft of or from cars; traffic congestion; the behaviour of other drivers; proposals for paying to use roads; the effect of the car on the environment; and the risk of being injured in a road accident.

The survey was carried out in June and July 1999 among 4,168 motorists in samples representative of the adult populations of the six countries.

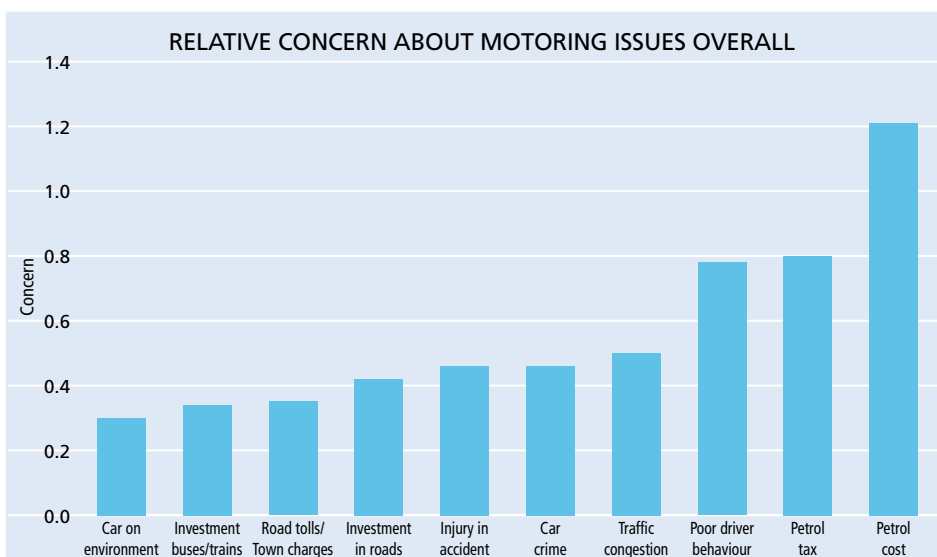
- Overall, the greatest concern is the immediate "it affects me" issue of the cost of petrol or diesel, followed by the

amount of tax-take in fuel and the behaviour of other drivers. Other issues show a very similar but lower level of concern. There is least concern over the effect of the car on the environment. Concern over lack of investment in roads is slightly greater than concern over lack of investment in buses and trains.

- 49 per cent of all motorists rank the cost of fuel in their top three concerns (and 28 per cent ranked it as their top concern).
- 38 per cent of all motorists rank the tax-take in fuel in their top three concerns.
- 36 per cent of motorists rank the poor behaviour of other drivers in their top three concerns.
- 26 per cent of motorists rank traffic congestion in their top three concerns.
- 15 per cent of motorists rank the effect of the car on the environment in their top three concerns (and only 3 per cent rank it as their top concern).

The concern over the cost of fuel is greatest in Germany and France. Relative concern over tax-take is high in these countries and in Britain. Most noticeably in the Netherlands, but also in Spain, France and Italy, there is concern over the behaviour of other drivers. The Netherlands also bucks the trend in that, probably because of recent controversial proposals by the Dutch government, there is greater concern there than elsewhere about paying to use roads. In Spain there is a high level of concern about the risk of being injured in a road accident. The British rate the lack of investment in roads and public transport higher than any of their five European neighbours.

¹ The ranking of any concern is relative to others and therefore strong feeling on one issue will diminish concern about others. A high level of concern in any country or area about general transport issues such as the level of investment in roads and public transport, for example, would reduce the score attributable to other concerns such as fuel costs. The scale of "concern" is an average derived by scoring the main concern as 3, the second concern as 2 and the third as 1. The survey did not include Northern Ireland.



The cost of fuel leads the way



Fuel costs: a concern everywhere, but motorists are also disturbed about how much tax they pay on the forecourt



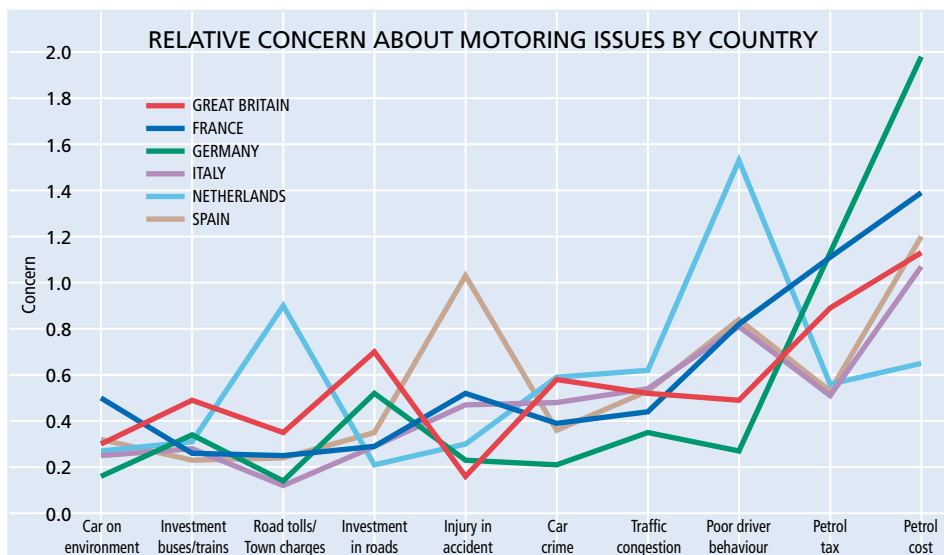
Speeding: a source of some of the concern in the Netherlands, France, Spain and Italy?

- 85 per cent of motorists in Germany (and 56 per cent in France) rank the cost of fuel in their top three concerns (compared with 45 per cent of motorists in Britain).
- 60 per cent of motorists in the Netherlands rank the behaviour of other drivers in their top three concerns (compared with 24 per cent of motorists in Britain).
- 40 per cent of motorists in the Netherlands rank paying extra charges to

use roads in their top three concerns (compared with 18 per cent of motorists in Britain).

- 48 per cent of motorists in Spain rank the risk of being injured in a road accident in their top three concerns (compared with 8 per cent in Britain).

- 26 per cent of motorists in Britain rank the lack of investment in roads in their top three concerns (compared with an average of 19 per cent in the survey).



Great variations between countries over some concerns



Investment: Europe's motorists are more concerned about roads than public transport

Concerns: *Differences within countries*

The issues that concern motorists most differ from country to country, but there are also clear differences within countries. **IN URBAN AND RURAL AREAS** concerns are noticeably different (though unsurprisingly less so in the very built-up Netherlands). The cost of fuel is an issue everywhere but generally more so in rural areas although this is not a consistent pattern in every country. Tax-take and poor driver behaviour is an issue in both urban and rural areas.

Car crime, traffic congestion, investment in buses and trains and concerns about the effect of the car on the environment are generally more of a concern in the urban environment. Apart from the Netherlands, the urban versus rural differences are also very small in Germany, except that investment in roads is much more of an urban concern

there than in other countries.

- 55 per cent of motorists in rural areas rank the cost of fuel as one of their three main concerns (compared with 44 per cent in urban areas).

IN BRITAIN concern over the lack of investment in roads is greatest in Scotland and least in London and the South. Concern over proposals to charge for the use of roads is also greater in Scotland than in other parts of Britain.

In London, more motorists are concerned over the lack of investment in buses and trains, and the effect of the car on the environment.

- 43 per cent of motorists in Scotland rank lack of investment in roads in their top three concerns (compared with only

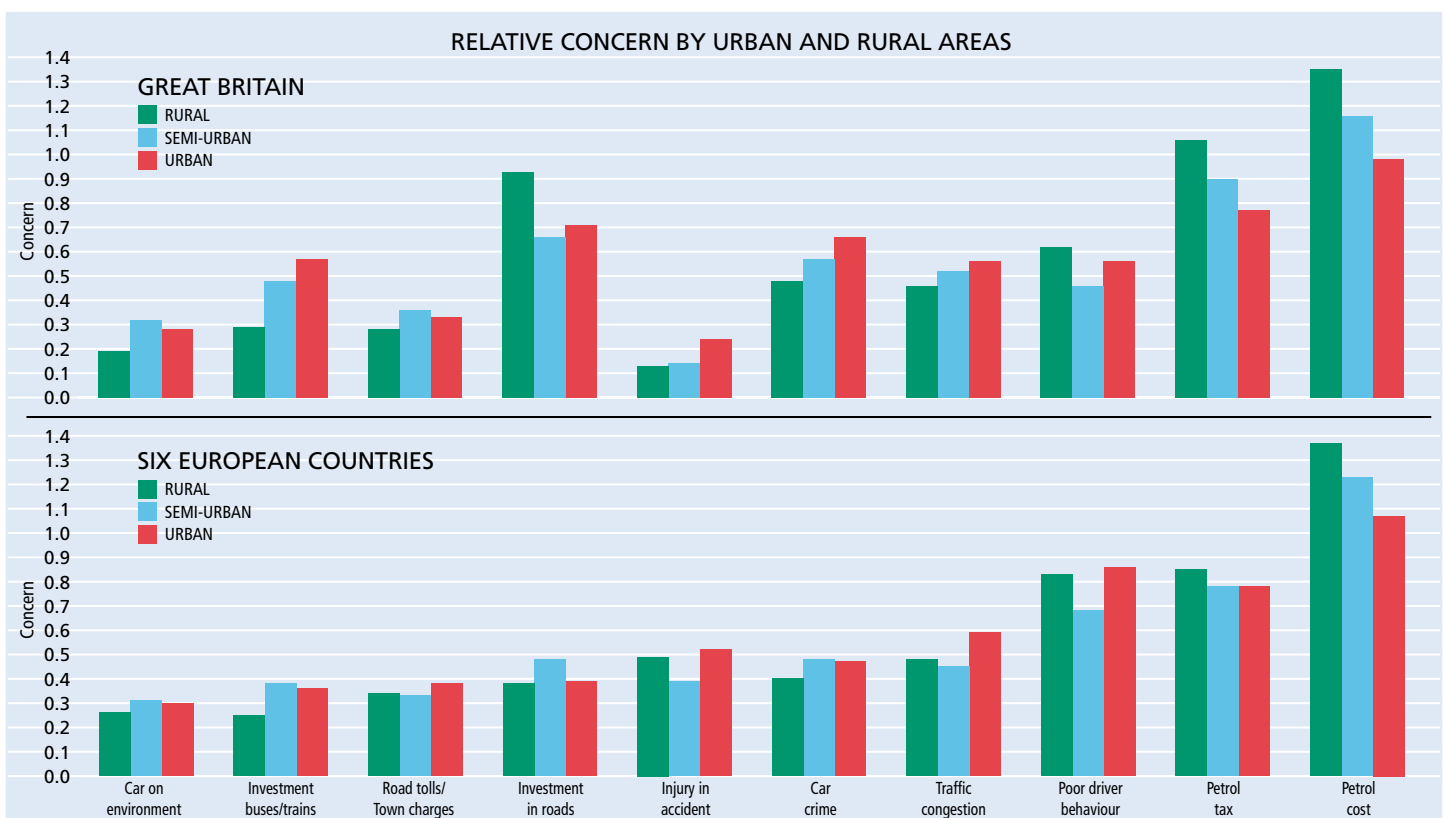
37 per cent in Britain as a whole).

- 40 per cent of motorists in Scotland rank proposals to charge for the use of roads in their top three concerns (compared with only 18 per cent in Britain as a whole).

- 33 per cent of motorists in London rank the lack of investment in buses and trains in their top three concerns (compared with only 21 per cent in Britain as a whole).

- 33 per cent of motorists in London rank the effect of the car on the environment in their top three concerns (compared with 16 per cent in Britain as a whole).

IN FRANCE the main differences to show up are between Paris and the rest of the



Some easily-understood differences between urban and rural areas

country and are largely a reflection on the urban versus rural life. Parisian motorists are less likely than the rest of the country to be concerned about the cost of petrol (and the tax-take), but are noticeably more likely to be concerned about traffic congestion and investment in buses and trains.

In the south-west of France there is relatively more concern about the effect of the car on the environment and about proposals to charge for the use of roads.

- 26 per cent of motorists in the south-west rank concern about paying for roads in their top three concerns (compared with 17 per cent in France as a whole).

IN SPAIN, similarly, traffic congestion is much more of a concern in Madrid and Barcelona than elsewhere.

- 42 per cent of motorists in Madrid and 39 per cent in Barcelona rank traffic congestion in their top three concerns (compared with 30 per cent in Spain as a whole).

IN ITALY concern over car crime, poor driver behaviour and injury-risk in an accident is greatest in the regions, including the south and Italy's Mediterranean islands.

- 38 per cent of motorists in Italy's south and the Mediterranean islands rank poor driver behaviour of others in their top three concerns (compared with 33 per cent in Italy as a whole).

IN THE NETHERLANDS, reflecting the controversy in that country, there is more concern over proposals for paying for the use of roads in the Amsterdam/Rotterdam/The Hague areas and in the rest of the west than in other parts of the country.

- 63 per cent of motorists in the Amsterdam/Rotterdam/The Hague areas and 48 per cent in the rest of west Netherlands rank proposals for paying for the use of roads in their top three concerns (compared with 40 per cent in the Netherlands as a whole).

IN GERMANY there are very few differences between the areas of the country that were analysed.

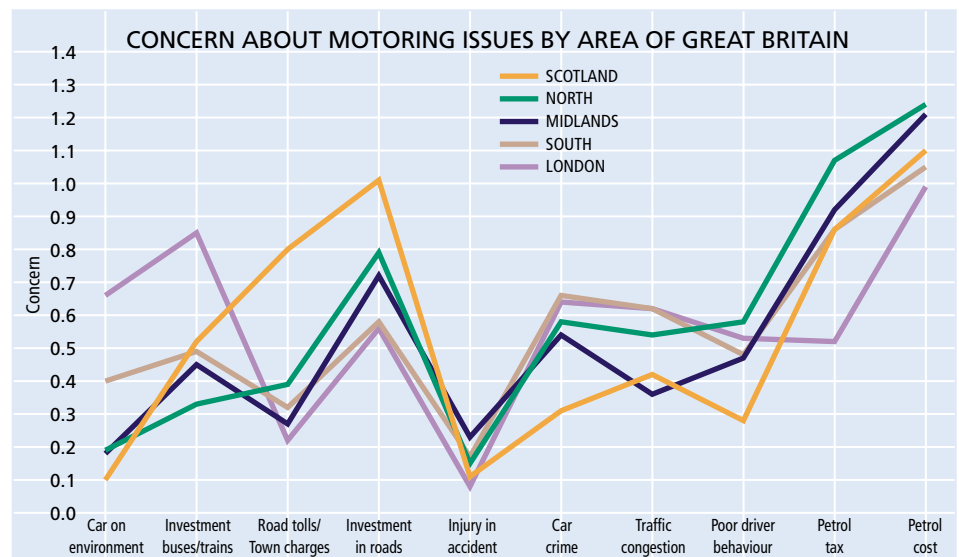
IN THE CITIES that are examined in this study (London, Paris, Amsterdam/Rotterdam/The Hague, Madrid and Barcelona) the concerns of motorists can be compared.

The level of concern of London motorists over the lack of investment in both roads and public transport and car crime is greater than that for other cities.

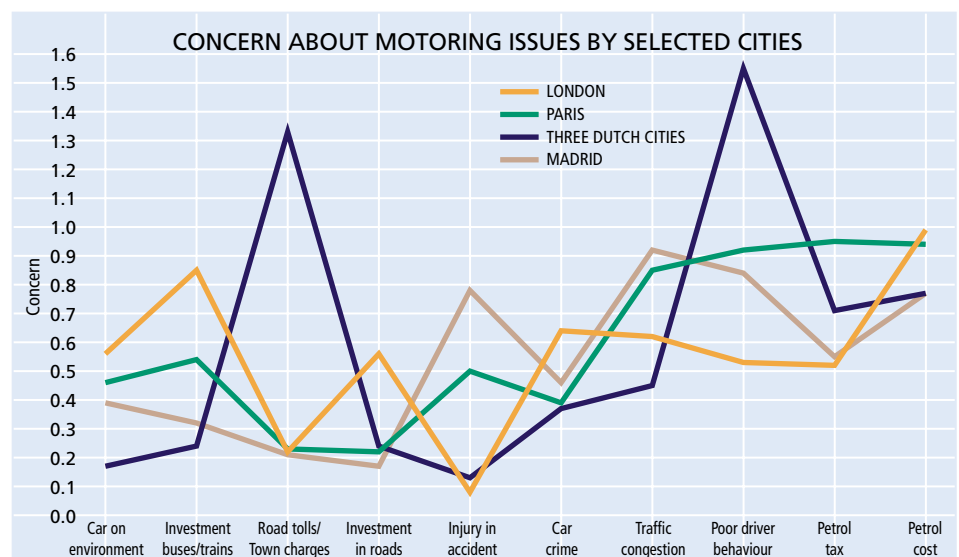
Correspondingly, motorists in Madrid and Paris are more concerned than Londoners about traffic congestion and the risk of being injured in an accident, while those motorists in Amsterdam, Rotterdam and

The Hague are very concerned about road tolls and are relatively more concerned than Londoners about the behaviour of other drivers.

- 33 per cent of motorists in London rank the effect of the car on the environment in their top three concerns (compared with 26 per cent in Paris, 19 per cent in Madrid and 8 per cent in the three Dutch cities).
- 63 per cent of motorists in the Amsterdam/Rotterdam/The Hague areas rank concern about proposals for paying for the use of roads in their top three concerns (compared with just 15 per cent in Paris, 13 per cent in London and 11 per cent in Madrid).



Great concern in Scotland about road charging and investment; concern everywhere about petrol cost



Drivers in Amsterdam, Rotterdam and The Hague worry about tolls and road rage

Concerns: *Differences between individuals*

MEN are generally slightly more concerned than women about the cost issues (fuel, tax-take and paying for the use of roads), road investment and congestion. **WOMEN** are markedly more concerned about the poor driver behaviour of others, and about the risk of being injured in an accident, the effect of the car on the environment and car crime.

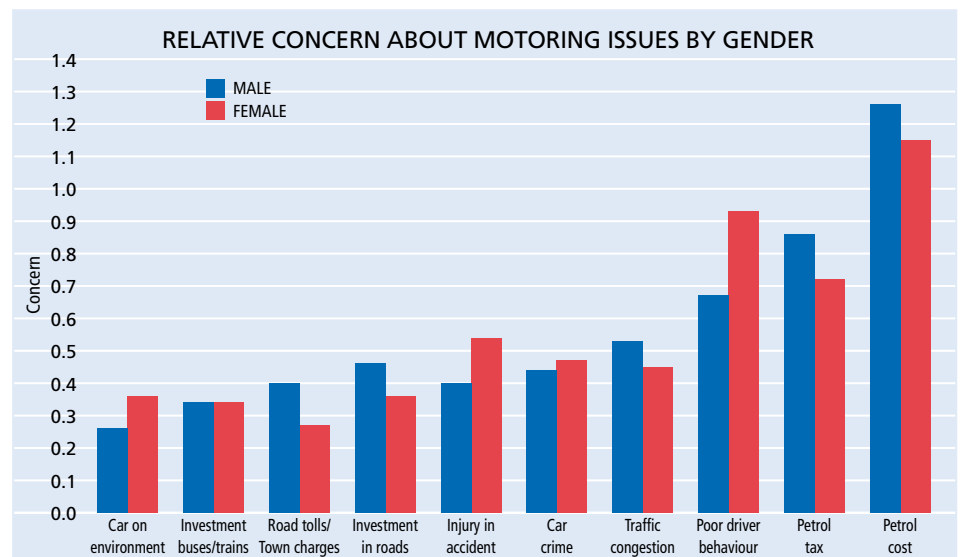
- 51 per cent of men rank the cost of fuel in their top three concerns

(compared with 47 per cent of women).

- 41 per cent of men rank tax-take in fuel in their top three concerns (compared with 33 per cent of women).

- 21 per cent of men rank the issue of investment in roads in their top three concerns (compared with 15 per cent of women).

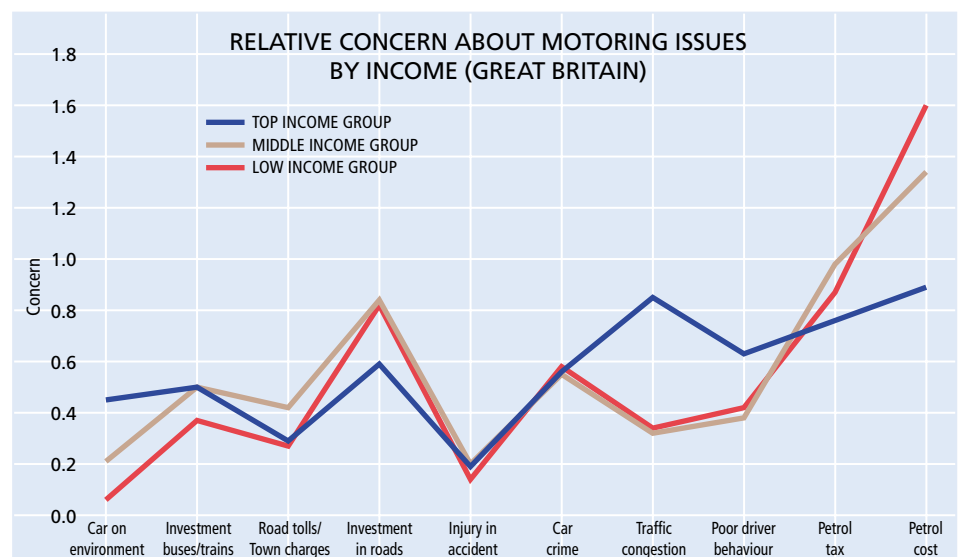
- 42 per cent of women rank the issue



Women worry more than men about personal security and green issues



Spain: lack of investment in public transport is not a major concern to the Spaniards



Unsurprisingly, the better-off worry less about petrol prices

of poor driver behaviour in their top three concerns (compared with 33 per cent of men).

- 24 per cent women rank the risk of being injured in an accident in their top three concerns (compared with 17 per cent of men).

ACROSS AGE GROUPS there is an overall consistency in the level of concern, but there are some notable exceptions. Younger motorists are generally more likely than others to be concerned about the cost of fuel. Concern over the tax-take is slightly higher among middle-aged and older motorists than younger ones. However, in Britain, both young and older motorists are likely to be concerned about the cost of fuel. Middle-aged and older drivers in France are more likely to be concerned than younger drivers about the poor

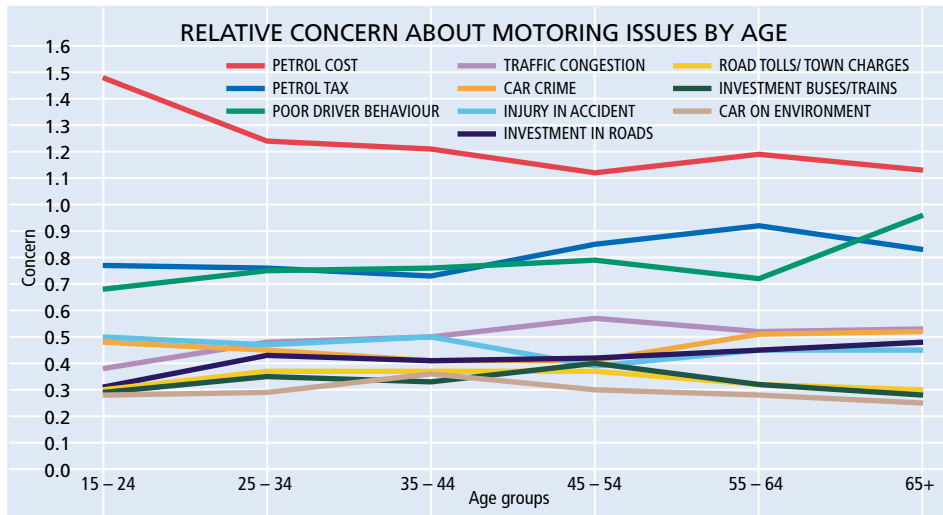
driving behaviour of others.

- 57 per cent of motorists under 25 rank the issue of the cost of fuel in their top three concerns (compared with 49 per cent of all motorists).
- 49 per cent of motorists in France older than 44 are likely to rank the issue of the poor driving behaviour of others in their top three concerns (compared with 39 per cent of younger age groups).

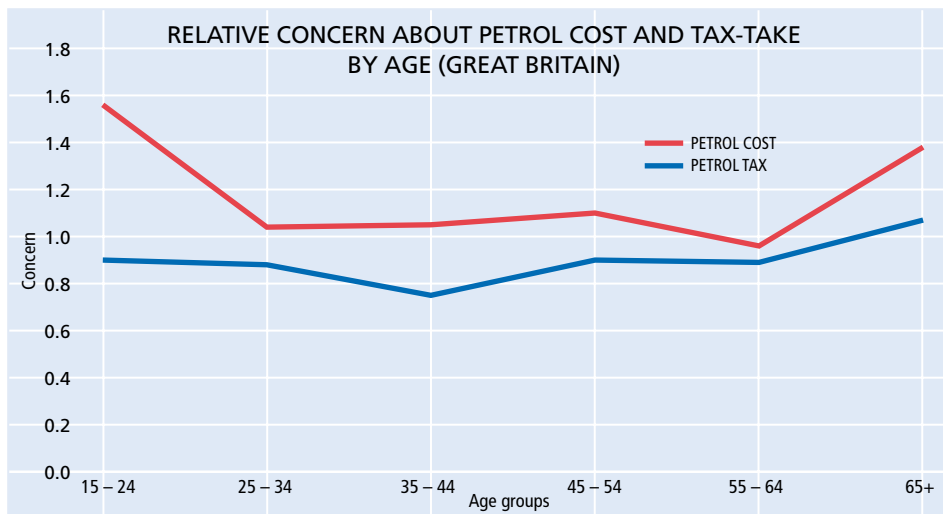
LEVEL OF INCOME, as may be expected, affects the degree of concern about petrol prices, with the better-off less concerned in most countries. In Britain, motorists in the top income bracket (many of whom are using their cars for business) are more concerned than others about traffic congestion, the poor driving behaviour of others and the effect of the car on the environment.



Car crime: it worries people who live in towns more than those in rural areas

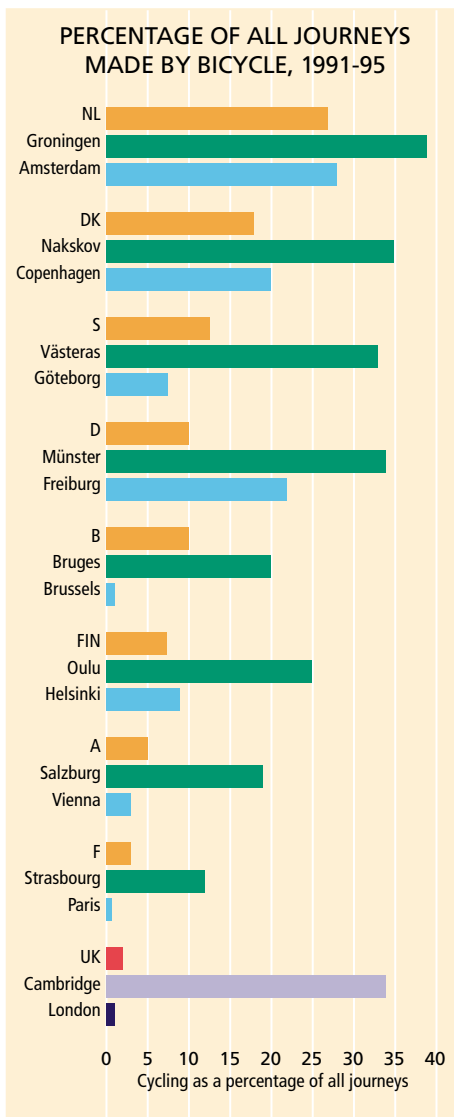


Few differences by age, although the young worry about petrol prices...



...and in Britain older people are concerned too

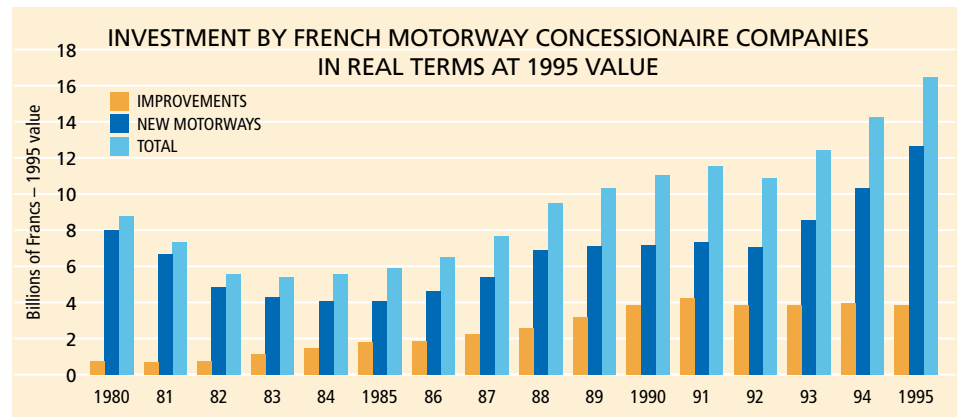
Transport provision



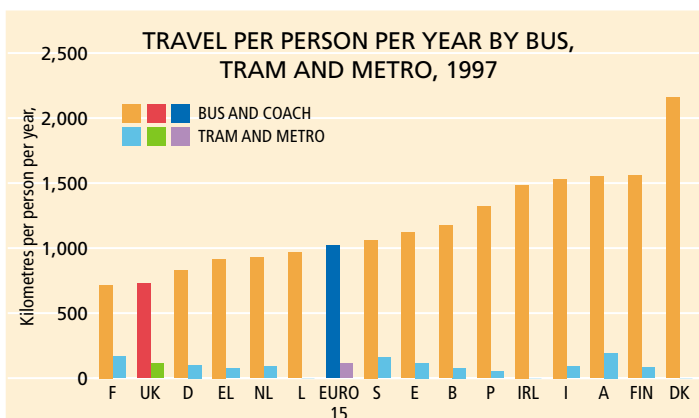
With exceptions, generally little bicycle use in the UK and France (and it is not increasing)

First Italy and then Germany developed basic motorway networks between the two world wars. In 1946, the then Ministry of Transport issued a map of proposed motorways in Britain. It was in all essentials the network of the M1, M4, M5, M6 and M62 motorways built in the 1950s and 1960s. By 1970, France had constructed 1,125 km of inter-urban motorways, linking Paris to France's second and third cities, and to the main Channel ports. The French master plan is for 12,120 km of motorways and 4,410 km of major highways. The aim is to have few areas more than 30 minutes from a motorway or major highway by the year 2005. On average, France has opened 252 km of new motorways every year since 1970.

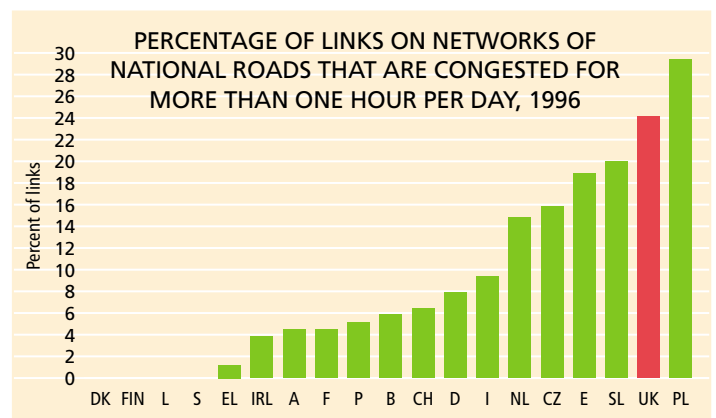
- By 1970 Britain had 1,021 km of motorway opened. Road spending fell by two-thirds in the 1970s, picked up in the 1980s, but by 1999 England's road programme contained an average of only five schemes per annum, with upgrades in Scotland all but halted. In the five years 1994-1998 inclusive, the French government invested 74 billion francs (about £8 billion) in the national road system. Most of the investment in French motorways has come from companies that hold concessions for motorways, and these investments have been increasing in real terms since the mid-1980s. Between 1993 and 1997, the motorway companies spent 80 billion francs (more than £8 billion) on improvements and on constructing new motorways.



10 years and more of consistent spending



Very low use of public transport in the UK



The UK has the worst congestion in Western Europe



Germany: leading the way in pedestrianisation, with Copenhagen following shortly after. Norwich began the trend in Britain

- In 1996, the European Parliament adopted a system of "Trans-European Networks (TENs)", agreed in the Maastricht Treaty. These are road, rail and waterway routes that serve trans-European traffic. The Trans-European Network comprises existing national roads and motorways which can be upgraded with financial assistance from the EU to be more suitable for long-haul traffic.
- The European Centre for Infrastructure Studies showed, in a survey of about 3,000 links of the national road networks in 19 European countries, that 24 per cent of UK links were congested for more than one hour and that the UK's record was second only to Poland.
- During the 1980s and 1990s, transport planning went out of fashion in Britain and provision of public transport was increasingly left to commercial enterprises. In mainland Europe, although the operation of many bus services and some railways was privatised, the planning of public transport remained a government function.
- In France, for example, urban transport involves two bodies: a municipality or group of municipalities

that defines the transport policy for the region; and the operating entity that provides public transport. Similar arrangements apply in many other countries and cities.

- The British motorist will find good public transport in virtually every major city of mainland Europe, almost always operating as a single company, with through-ticketing and area travel cards, and comprehensive information for passengers. Public transport is well-used in mainland Europe. Of course, there is also excellent (but often isolated) public transport in parts of Britain, but this is not the general rule. Outside urban areas, the situation is not so good. As in much of Britain, a car is essential for normal rural life.
- Many measures for vulnerable road-users have come from mainland Europe – the first pedestrianised shopping street was in Essen (in 1952), extensive infrastructure for cyclists is in place in many countries, and the Dutch have led the way with their version of "home zones". Without similar investment it is unlikely that, for example, the UK target of doubling cycling by 2002 (compared with 1996 levels) will be achieved.

We understand the problems:

"Congestion and unreliability of journeys add to the costs of business, undermining competitiveness particularly in our towns and cities where traffic is worst..."

The convenience of the car is eroded by congestion and driving is becoming increasingly stressful."

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p11.

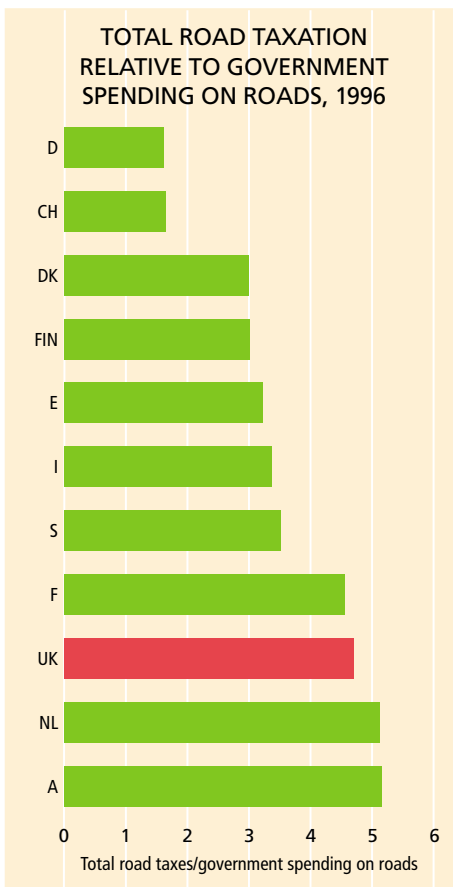
"Public transport offers an alternative sometimes. However, trip-making behaviour using the car has developed in such a way that the prospect of switching to public transport is unrealistic in many cases."

S Glaister and D Graham, Who spends what on motoring in the UK?, AA, Basingstoke, 1996, p2.



The Netherlands: Amsterdam's lively market draws in both local people and tourists

Transport tax and spend



In 1996 the UK taxed high and invested little. The picture is worse today

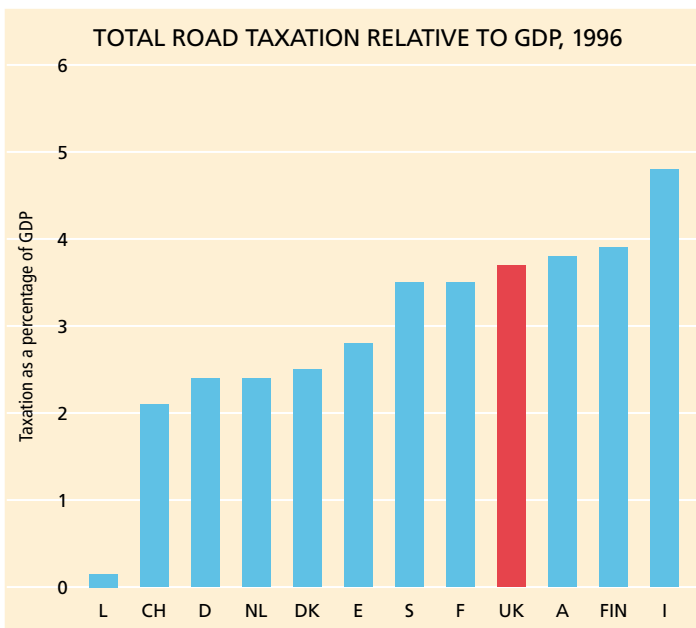
The governments of almost every European country use their motorists as sources of general revenue. Except for Luxembourg, European governments collect more taxation from motorists than they spend on providing and maintaining roads. The latest complete comparisons are from 1996. International Road Federation figures show ratios ranging from 1.6 times as much taxation as expenditure in Switzerland to more than 5 times in the Netherlands and Austria. In 1996, the UK collected 4.8 times as much tax as it invested in roads, and was towards the high end of the European countries. But these 1996 figures almost certainly badly understate the current UK mismatch. Previous AA studies estimate that in the UK in 1997/98, road taxation was 5.3 times government investment in roads. This difference has escalated year by year, with above-inflation increases in fuel duty over seven successive Budgets matched by reductions in roads spending.

- A high ratio of taxation relative to

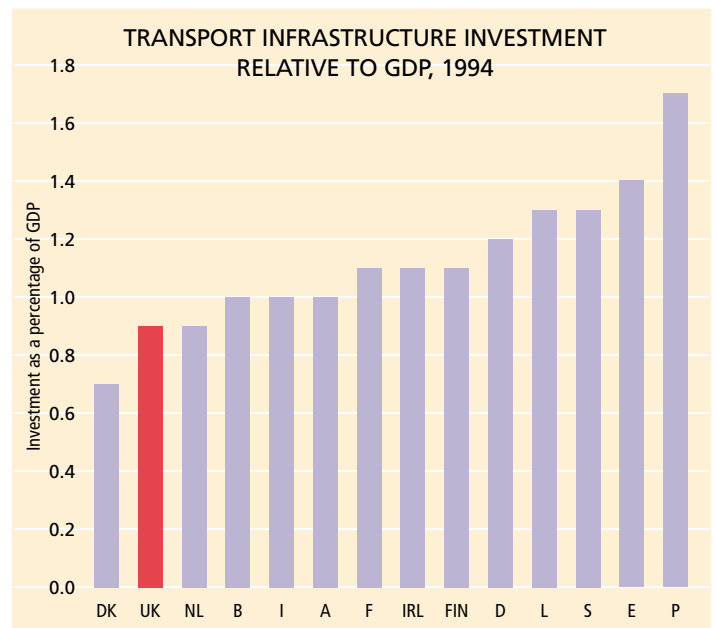
investment can be due to high taxation or low investment. Another way to examine tax and spend is to normalise both by GDP (to correct for "ability to pay"). In 1996 the UK was towards the top of the range in terms of taxation, with a total road tax of 3.7 per cent of GDP, and since then the fuel tax escalator will have moved the UK even further up the scale.

- Although road taxation was introduced across Europe to pay for roads, the extent to which tax has been related to expenditure over time has varied. The Germans and Swiss have maintained the strongest investment link. Finland and Italy have both high taxation (Italy because it is one of the few reliable means of raising funds for the Exchequer) and high expenditure; Austria has high taxation and low expenditure. AA research shows that 82 per cent of motorists believe that the high taxation and low expenditure in the UK is unacceptable.

- Government spending on road construction, maintenance and



High in 1996; higher now thanks to the UK's controversial fuel tax escalator



The UK was second-bottom to Denmark in terms of transport investment

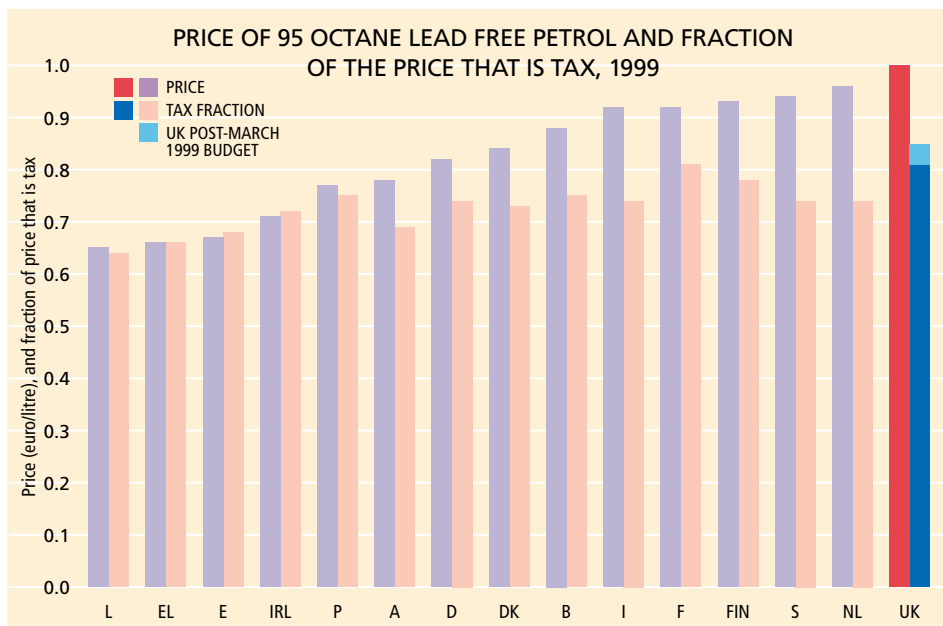


Austria: imaginative and creative solutions like the Europa bridge need serious investment over many years and were built before recent cutbacks in that country

operation, takes between 0.5 and 1.5 per cent of GDP. There are two sources of information on expenditure on roads. *EU Transport in Figures 1999* provides estimates for EU member states for 1994, and the IRF provides figures for a wider range of countries for 1996. The UK is towards the lower end of the range of countries for both sources.

- In the UK a relatively high proportion of the total road taxation comes from tax

on fuel. When the price of fuel in the early months of 1999 was published by the European Commission in April 1999, the UK had the highest price for petrol in Europe. After the March 1999 Budget in the UK, the tax-take from petrol was 85 per cent and this is not exceeded anywhere in Europe. The situation for diesel fuel is even more extreme: diesel in the UK cost 1.01 euro/litre in early 1999 while most countries were in the range 0.60 to 0.67 euro/litre.



The UK petrol prices and tax-take are the highest in Europe

Minimum expectations...

“We have matched spending to our priorities. For transport, these are to ensure that we properly maintain and manage our existing infrastructure and that we support the delivery of integrated transport locally to reduce congestion...”

A New Deal for Transport: Better for Everyone. The Government's White Paper on the Future of Transport, July 1998, p93.

...that may not be achieved:

“We are very disappointed that the Department is still unable to estimate the extent of the backlog of trunk and local road maintenance and the cost of overcoming it ...Targets must be set for the elimination of this backlog over ten years. Priority should be given to the maintenance of the more heavily used roads.”

House of Commons Environment, Transport and Regional Affairs Committee Fifteenth Report, Departmental Annual Report 1999 and Expenditure Plans 1999-2002, July 1999, para. 58.



Austria: trams, like these in Vienna, offer an attractive choice for some trips

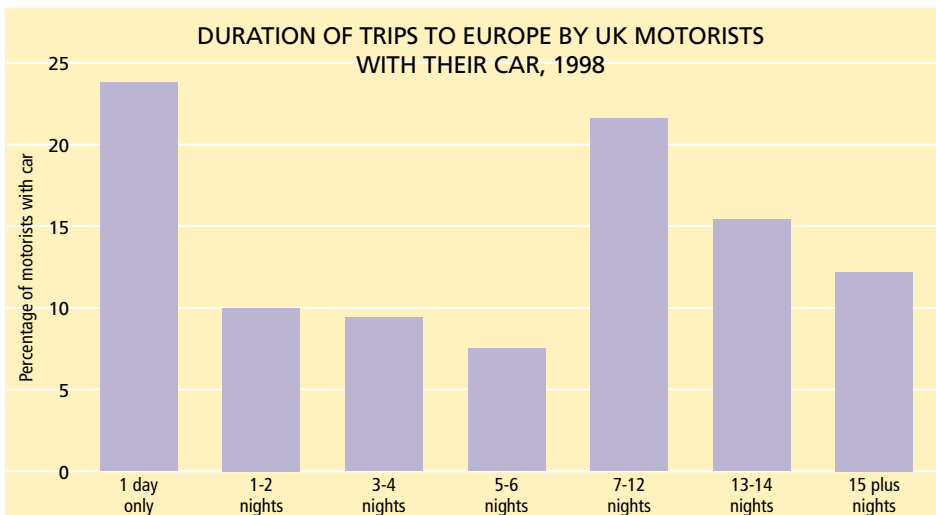
When things go wrong

Sadly, not all visits to mainland Europe by British motorists go smoothly. Common problems involve breakdowns, accidents and theft from cars.

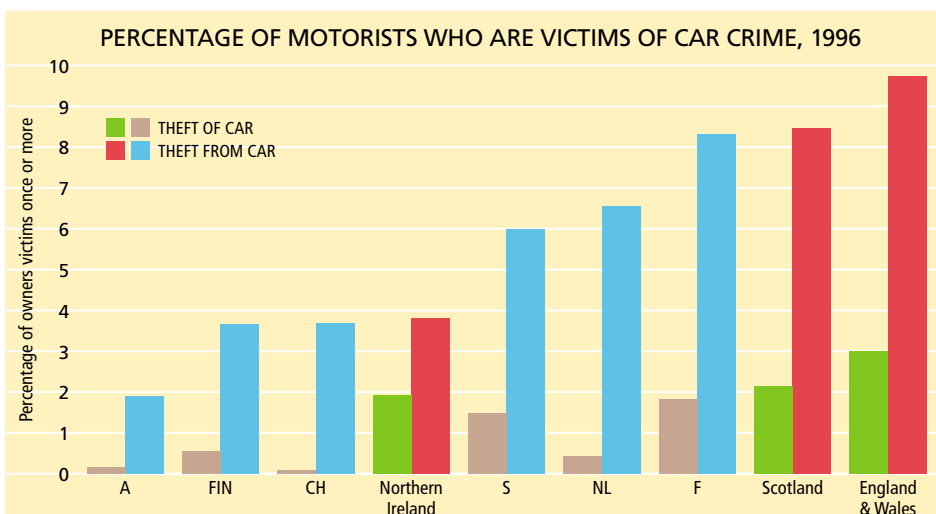
- In 1998 about 3.5 million trips were made to mainland Europe, with an average of 2.5 passengers per car. Almost a third of travellers went without any cover other than their basic motoring insurance. The AA provided additional cover through its Five Star scheme to about a quarter, all other motoring organisations together for about a third,

and agencies such as ferry companies for the remainder.

- In 1998 the AA's French Operations Centre handled just under 80,000 calls for assistance and its European Operations Centre more than 61,000.
- Emergency repairs were provided to those covered by AA Five Star: spare parts were sent to stranded motorists; travel costs were reimbursed and hotel bills paid; vehicles were repatriated and chauffeurs were sent to drive cars home when owners were taken ill abroad.



Day trips and the annual holiday dominate



Theft of cars is 15 times more likely in England and Wales than in Switzerland

- Drivers who take day trips to mainland Europe are only half as likely to take out breakdown cover as those who take short breaks of one or two nights away or those who go for longer.

Just as British motorists experience problems in Europe, so do other motorists in their own countries. Road accident risk has been dealt with on pages 22-23. It is interesting also to compare the call-out rates for roadside assistance (usually as a result of breakdown) from some of the European motoring organisations and the motorists that they cover, and to compare the theft of and from cars in various countries. National temperament and culture and the age and characteristics of the car parc contribute to differences.

- In the 20 countries surveyed there was a range of call-out rates. Most motoring organisations can expect calls for assistance each year from between one in two and one in four motorists covered.

- There are a number of exceptions, almost certainly caused by local custom and practice and the conditions of the cover. For example, far fewer motorists in



Breakdown cover: about a third of UK motorists take the risk of having none when they go abroad

Sweden and Iceland make use of the service – one in 30 and one in 32 respectively. This may be because of the greater self-reliance or car reliability required in the northern climate, or even geographical remoteness from help.

- In Greece, the situation is reversed and motorists use the service on average almost twice a year. The Automobile and Touring Club of Greece (ELPA) blames this on an aged car parc, poorly-maintained roads, “indifference to car maintenance” and “Mediterranean temperament”. ELPA also has a strong service tradition of not limiting the frequency with which those covered may call for assistance, no matter how trivial the request.

- Theft of and from cars also shows great variation between countries. Of those surveyed in the 1996 International Crime Victimization Survey, theft of and from cars was greatest in England and Wales, followed by Scotland.

- The incidence of car crime in France is similar to that in Scotland but the other countries in the survey all experienced less crime, some substantially less. However, it is notable that the proportion of the theft of to theft from cars is relatively high in

Northern Ireland, this possibly related to terrorist activity. It is estimated that the ratio of unreported : reported theft from vehicles in Britain is about 2:1.

CALL-OUTS FROM SELECTED EUROPEAN MOTORING CLUBS

Country	Membership (m) estimate at end 1998	Rank order of call outs per member, 1998 (1 – high)*
Greece	0.142	1
Spain	0.786	2
Belgium	0.898	3
UK (AA)	9.474	4
Ireland (AA)	0.185	5
Austria	1.292	6
Italy	1.250	7
Portugal	0.180	8
The Netherlands	3.460	9
Lithuania	0.017	10
Slovenia	0.101	11
Hungary	0.302	12
Switzerland	1.369	13
Czech. Republic	0.216	14
Germany**	13.898	15
Cyprus	0.009	16
Finland***	0.070	17
Norway	0.420	18
Sweden	0.120	19
Iceland	0.019	20

* member benefits and assistance practice varies between motoring organisation

** the ADAC is an association of a number of clubs

*** Autoliitto: assistance also provided to some non-members



The AA: helping to support the UK's first complete network of air ambulances



Roadside assistance: call out rates vary from country to country

Lessons from Europe



"Anybody who travels on our roads and railways knows that after years of neglect and under-investment, Britain suffers from an overcrowded, under-financed and under-maintained transport system."

Gordon Brown MP, 1998 Comprehensive Spending Review

Denmark and its anomalous car tax situation aside, in the EU only Greece, Ireland and Portugal, historically three of the least prosperous countries, have a substantially lower car ownership than the UK. Car-use in the UK is near the EU average.

Some aspects of transport the UK does as well as, if not better than, its EU partners – road safety is an obvious example. But in other areas the UK does not compare well. It has performed poorly in planning, investment and implementation, and in day-to-day management of the roads and transport system. Chancellor of the Exchequer, Gordon Brown, has recognised this.

Motorists' major concerns (outlined on pages 26-31) are "me issues" – what motorists pay, what they get in return, their personal security as they travel, and the frustrations such as congestion that they put up with on the way. The actions that need to be taken come from these concerns.

What motorists pay



Awareness up: the AA Fair Deal for Motorists campaign

Taxation too high – investment too low

The UK has taxed high and invested low. It should invest to the same level as Europe if its transport system is to be made as good as the rest of Europe – typically double today's annual amount of £6 billion. Of all the reasons for Britain's transport poverty, it is the failure to invest that is the key. Poor planning and low quality of design and implementation all flow from a basic failure to invest.

The fuel tax escalator – stop it now

The UK's fuel tax escalator, introduced under a "green" cloak to raise revenue, must be scrapped immediately.

Road pricing? – no thanks!

The diversion of motoring taxes to other programmes is common across Europe. The survey shows the current concerns in the Netherlands and Scotland about controversial proposals in both countries to charge motorists new additional amounts for driving on existing roads. However, road tolls, collected by a private company or independent authority, are broadly tolerated across Europe, where it is clear that the money raised is flowing directly into the provision of new roads, bridges and

tunnels. No country in Europe has implemented a system of road pricing that manages the demand for roads by matching it to the supply available. Government must re-build the trust that what motorists pay will be spent on better roads and transport.

Car prices – why pay more?

The UK's private buyers pay more for their new cars than anyone else in Europe. The obstacle course involved in buying a right-hand-drive car abroad has hampered a competitive market. The introduction of the euro, and the information on dealers and agents now available on the Internet, is assisting greater transparency in European pricing. Exemplary fines have been imposed on car manufacturers for anti-competitive behaviour. There are currently privileged exemptions from full competition for car manufacturers and dealers but these expire in 2002. In the past, these special exemptions have brought advantages to the consumer for servicing and spare parts. If a new exemption deal does not bring clear advantage to the consumer, the exemption should be scrapped.



From the Austrians and Dutch: "No!" to new tolls for old roads

Car crime – unacceptably high

The UK should not have to accept that it has the worst car crime rate in Europe. Improving enforcement, securing car parks and increasing motorists' awareness of how to protect themselves will help. Manufacturers must continue to make their vehicles ever more secure.

Road safety – courtesy and care

The UK has one of the best road safety records in Europe and is more concerned about road safety than most other European nations. By comparison with Europe, the UK's driving standards and attitudes to issues such as drink-driving are enviable. Despite the UK's success, there remains huge scope to reduce deaths and casualties and the UK must watch for new ideas coming from mainland Europe. As in other parts of Europe, there is also a need to counter irresponsible behaviour on ever more crowded and stressful roads.

Land-use planning – a long-term issue

Where people live, work, shop and spend leisure time determines where and how far they travel. It is generally accepted that the UK and the Netherlands led Europe in following the American pattern of decentralisation of people and jobs that is common in post-industrial societies. Going farther and to widely dispersed places goes some way to explaining the UK's long commute times and low patronage of public transport, and is consistent with a flexible labour market. Measures currently being put in place to counter some of the excesses of bad land-use planning must continue. Other countries are also struggling with these issues.

Personal security and safety



Gender: women have greater concerns than men about personal security

Transport planning



Investment in quality: France's concessionaire companies have spent well

Strategic planning – no more snakes and ladders

Upgrades to the UK's roads and transport system take generations to come to fruition and what is then delivered is often far less than originally conceived. A proper debate and consultation on what needs to be done must be followed by clear, realistic and financeable decisions on what to implement by when. Programmes should take no more than 5-7 years to deliver.

Enabling authorities plan and commission

Successful European transport systems typically have an enabling strategic authority overseeing the total roads and transport service. That body commissions services from service providers. The UK turned its back on strategic planning in the 1980s but is now seeking to reintroduce it. The planned Strategic Rail Authority and election of a London Mayor, echoing London's Parisian counterpart, are opportunities. In London, the Mayor's electoral authority must be harnessed to reverse chronic road and transport decline and provide an example of a better way forward for the rest of Britain.

Investment in quality: a planning system that shows what will be provided and when

The UK's strategic road network – congestion and missing links

The UK has the sparsest motorway network in Europe for its size and population density, and the worst congestion. The M1, M6 and M25 each carry 2-3 times the traffic burden of motorways doing a similar job in many parts of Europe. Bypasses are decades overdue and there remain many gaps in the network. The UK's regions are also poorly served. Major road building programmes through greenfield sites is now unacceptable but a third of all traffic is on motorways and trunk roads. The core network must be given the capacity to cope and so stop traffic drift onto unsuitable town and country roads. The solutions are traffic management, targeted widening (using tunnels on the European model wherever there are pressing environmental constraints), and priority lanes where they are justified (but these must be additional, not replacements).



Transport choice – can make a small but important difference

Britain has invested too little in quality modes of transport to make them attractive alternatives to the car. Many of the UK's buses and trains are shabby and downmarket compared with their European equivalents. Better public transport can and should carry more of the transport strain – it can win a greater market share of travel in some critical corridors or urban centres. But better public transport can only reduce the amount of *overall* travel by car at the margin.

Toxic emissions and air quality – getting better

Ever-tightening pan-European regulations introduced since 1992 and better technology mean that levels of toxic emissions from vehicles, and particularly from cars, have fallen quickly. This rapid fall will continue across Europe as new, cleaner vehicles replace older dirty ones. The UK must now raise awareness of the importance of vehicle maintenance, take enforcement action against the wilful gross polluter, advocate yet further tightening of heavy diesel regulations in light of technology development, and seek fair and efficient ways to scrap the oldest, most polluting vehicles.

Fuel efficiency – technology not taxation

Following the Kyoto conference, Europe is committed to reducing its greenhouse gas emissions by 8 per cent of their 1990 levels in the period 2008-2012. European motorists will achieve their full share of this cut in emissions, and save money, as a result of the agreement between car manufacturers and the European Commission to develop and sell more fuel-efficient vehicles. The UK government, however, has accepted that the UK should have a 12.5 per cent share and even has a “goal” for a 20 per cent reduction. The practical consequences or sense of this higher national commitment have not been sufficiently explained to, or debated with, Britain’s motorists. The government must make clear if and why it expects Britain’s motorists to carry a significantly greater burden than other European motorists.

Quality and design – getting the detail right

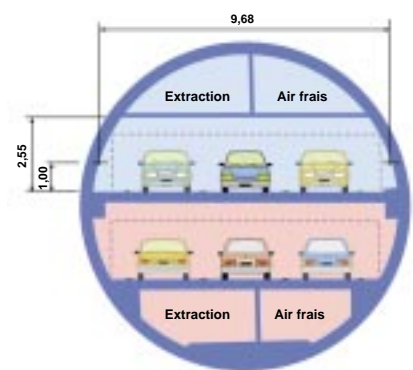
Britain needs to adopt the best of European design. The Dutch have invested to provide “home zones” and an appropriate scale, pace and place for cyclists and pedestrians in the road hierarchy; the Germans led in pedestrianisation and many have followed; the French have provided innovation and architectural appeal in the design of noise barriers and have put a high priority on the treatment of noise.

Technology and innovation – tomorrow’s answers now

Despite the fact that many other parts of Europe do not generally have the traffic density and congestion encountered in the UK, they do have greater ability to cope with incidents and congestion when they do appear. The Dutch, for example, have incident management and speed and automatic lane control to a much greater extent than exists in the UK. The UK’s M25 variable speed limit trial has shown (after early problems) the scope for using technology for better traffic management. With growing technological convergence of systems on the road, in the car, and mobile communications, there is major scope for raising the quality of road management and information services to Britain’s motorists in future.

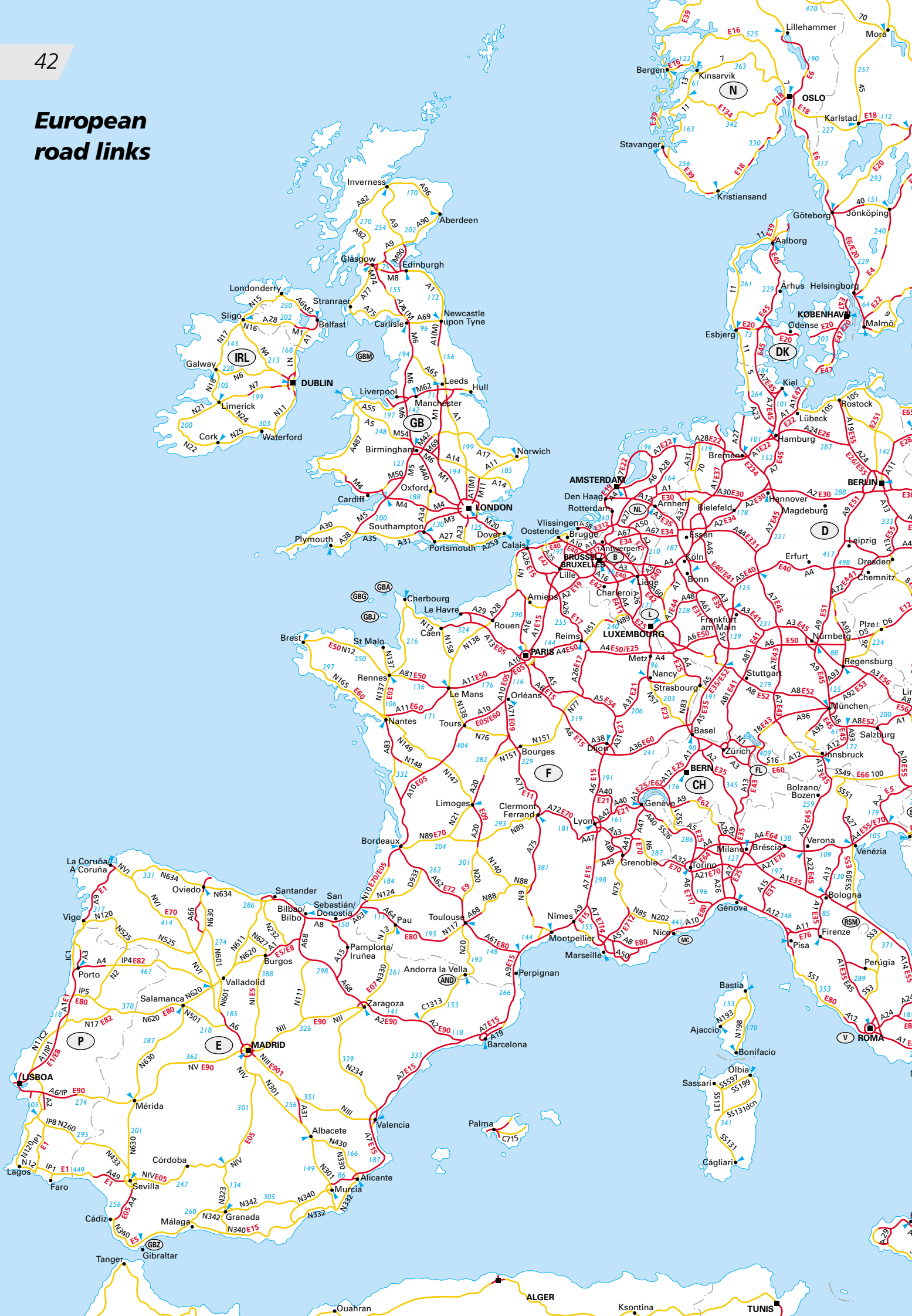
**Vehicle emissions**

Investment in quality: the Netherlands’ culture of cycling, supported by good infrastructure

New ideas

Innovation under construction: a new path for motorists means less traffic in Versailles

European road links





The countries with the greatest population density also have the greatest density of motorway (kilometre of road per square kilometre of land). France and Spain have more motorway than might be expected but the UK has less than the European Union average despite its population density. Germany and the Benelux countries, at the crossroads of Europe, have well developed motorways catering for transit traffic. To the north and east, countries have little provision, but they are on the edge of Europe, either with low population densities or have experienced under-development behind the former Iron Curtain.

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Page 9 – Boulogne, 1925: National Motor Museum; Le Shuttle: AA Membership Photo Library.

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Page 21 – Germany: National Motor Museum; Britain: AA Motoring Policy Unit.

Page 23 – Accidents: Euro NCAP; Speeding: AA Motoring Policy Unit.

Page 25 – Noise barrier in Paris 20^e: Mairie de Paris.

Page 27 – Fuel costs: AA Motoring Policy Unit; “White van man”: AA Motoring Policy Unit; Investment: AA Motoring Policy Unit.

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Pages 38-41 – Gordon Brown: Rex Features; Road pricing: Österreichischer Automobil-, Motorrad- und Touring Club; Stop pay as you drive: Koninklijke Nederlandse Toeristenbond ANWB; Gender: AA Membership Photo Library; French motorway: Autoroutes du Sud de la France, (Benoit Pesle); Map of French motorway: Ministère de L’Équipement, des Transports et du Logement; Cyclist: AA Motoring Policy Unit; Tunnel: Cofiroute.

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The AA toxic tailpipe index and CO₂ index are produced by NETCEN. Data provided for 1998 are provisional and subject to change on completion of the annual inventory for that year.

Information from the AA's report *The Great British Motorist* may be freely quoted provided the source is acknowledged.

The AA routinely collects data as part of its service to motorists and customers. Some of this information is presented as indices below, 100 being the value for the initial comparison period.

Year	92	93	94	95	96	97	98	99
Running	100	103	82	85	89	94	101	103
Standing	100	107	88	89	93	97	102	106
Total	100	106	86	88	91	96	101	105

*In 1994 the index was re-calibrated to reflect the need for less frequent servicing, routine repairs and replacements and to reflect the improved reliability of newer cars.

Year	92 (Apr)	93 (Apr)	94 (Apr)	95 (Apr)	96 (Apr)	97 (Apr)	98 (Apr)	99 (Apr)
Cash cost	100	110	112	120	121	130	144	154
Per cent tax	66	66	65	72	77	77	82	82**

**85 per cent in March 1999

Year	94 (Jul)	95 (Jul)	96 (Jul)	97 (Jul)	98 (Jul)	99 (Jul)
Comprehensive	100	98	93	105	114	126
Non-comprehensive	100	98	96	106	115	127

Period	92	96 Q1	96 Q2	96 Q3	96 Q4	97 Q1	97 Q2	97 Q3	97 Q4	98 Q1	98 Q2	98 Q3	98 Q4
NOx	100	83	81	79	83	77	76	74	73	71	66	64	68
PM ₁₀	100	83	80	77	83	73	73	69	69	68	62	59	64
CO	100	77	76	76	78	70	71	70	70	66	63	63	67
VOC	100	76	74	73	75	68	68	66	66	62	59	57	60
Benzene	100	73	71	71	72	64	64	62	62	58	52	55	51

***Re-based October 1999

Period	92	96 Q1	96 Q2	96 Q3	96 Q4	97 Q1	97 Q2	97 Q3	97 Q4	98 Q1	98 Q2	98 Q3	98 Q4
CO ₂	100	100	97	96	106	102	101	94	105	105	94	95	105

***Re-based October 1999

Period	96 Q4	97 Q1	97 Q2	97 Q3	97 Q4	98 Q1	98 Q2	98 Q3	98 Q4	99 Q1	99 Q2
Reported incidents	100	116	121	134	142	153	147	147	157	154	154

AA indices

AA index of (cash) costs per mile
for a 1,401-2,000 cc car assuming 10,000 miles per year*

AA fuel price survey index of cash cost, and tax as percentage of price (unleaded petrol)

AA insurance index (cash costs for car insurance)

AA toxic tailpipe index* (all vehicles)**

AA CO₂ index* (passenger cars)**

AA gridlock gauge

AA Motoring Policy and Road Safety Research

The AA was founded in 1905 to promote and to defend the interests of pioneer motorists. Concern for road safety was enshrined in its first Rules, and public affairs have remained at its heart for more than 90 years.

Today, it is the responsibility of the AA Motoring Policy Committee to look after these interests and press for safer, cleaner and more efficient motoring. The Committee:

- comprises individuals with wide business, operational and public policy experience;
- is assisted by advisors of high standing in academic, government and public life, independent of party politics.

The AA Motoring Policy Committee is required to:

- oversee AA policy and opinion research and ensure that it is carried out with full regard to professional and technical integrity and on the basis that it should withstand peer review or audit by experts;
- ensure that AA motoring policy work is carefully matched to the concerns and aspirations of motorists, as identified through surveys and direct contact with motorists;
- approve the AA stance on major issues of the day;
- guide a programme of activity on issues of core concern to motorists – consumer affairs, roads and transportation, road safety and environmental matters.

Day-to-day public policy activity is undertaken by the AA Motoring Policy Unit and by a separate, independent charity, the AA Foundation for Road Safety Research, established in 1986.

Details of research undertaken by the AA Motoring Policy Unit and the AA Foundation for Road Safety Research, and research and policy publications, may be obtained from them at:

Norfolk House
Priestley Road
Basingstoke
Hampshire RG24 9NY
E-mail: motorist@theaa.com
Website: www.theaa.com