

RAC

Report on Motoring 2023

Making motoring easier



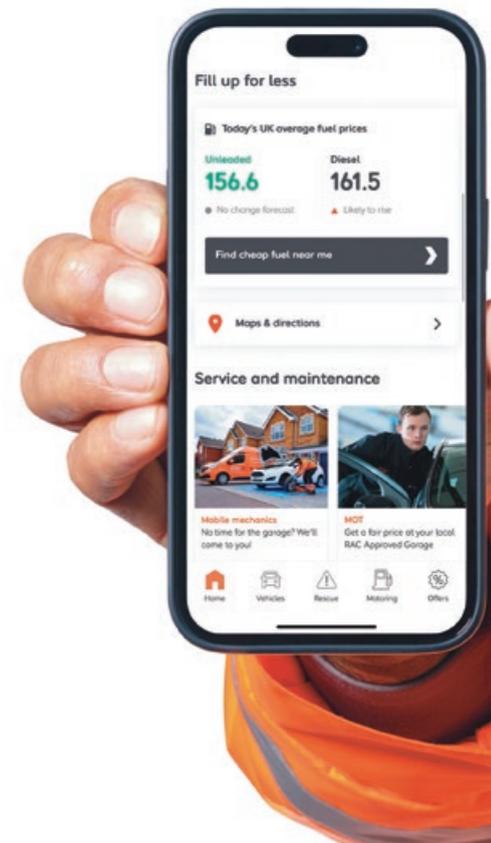


Mitchell,
patrol since 2018,
South West

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Foreword

Dave Hobday, RAC Chief Executive

The sheer scale of the problems afflicting our local roads is laid bare in this year's Report on Motoring, with potholes and road maintenance at the forefront of drivers' minds as it tops the concerns chart once again. This might be something of a surprise considering the cost pressures drivers are facing at the pumps and elsewhere but is no doubt a damning indictment of those responsible for the network's upkeep.

As the UK's leading driving services provider, we're always innovating to find new solutions to help make drivers' motoring lives simpler. Last year, we launched Mobile Mechanics who can service and repair customers' cars at home or at their workplaces to save them both time and money. Designed to complement our core breakdown operation and broaden the services we offer the nation's 40m drivers, RAC Mobile Mechanics can now be found in 20 of the biggest cities in the country. Those wanting us to bring the garage to them can book easily online.

With the UK's pothole problem already contributing to more than 27,000 RAC breakdowns in the first half of 2023, our Mobile Mechanics can now even fit new suspension springs on customers' driveways, sometimes just hours after they have been rescued by one of patrols from a breakdown out on the road. Our in-house team is also embracing the benefits of AI which allows us to automatically assign a Mobile Mechanic to fix a fault based on a patrol's roadside report. We were proud to showcase this unrivalled service to roads

minister Richard Holden when he visited our headquarters in Walsall this summer.

This year's Report once again shows how dependent drivers are on their vehicles post-pandemic, with eight-in-10 saying they would struggle to adjust their lifestyles to being without a car. It also shows in stark terms how cost-of-living pressures are causing some drivers – particularly younger ones – to cut back on maintenance which we fear could have negative consequences for road safety. To make servicing more affordable, we have introduced service plans that can be paid monthly to spread the cost.

While we are developing solutions to help keep our members on the road, it is also vital that government invests in improving our network. As most journeys begin and end on a local road, we want to see the Government encourage councils to carry out better, more cost-effective maintenance by using all the tools available to extend the lives of roads and to resurface the ones that are no longer fit for purpose to the highest possible

'Innovation has always been synonymous with the RAC brand'

standards. This, of course, depends on local authorities having sufficient funds to plan longer-term maintenance.

Elsewhere, the cost of fuel remains a huge issue for drivers, which is why we added a fuel finder feature to the myRAC app which can save users up to 6p a litre at the pumps. We continue to monitor the price of petrol and diesel through RAC Fuel Watch and campaign for fairer prices. Those driving electric have also seen charging costs soar due to wholesale energy prices rising following Russia's invasion of Ukraine. As with fuel, we are now tracking the price of public rapid and ultra-rapid electricity via RAC Charge Watch to give drivers a comprehensive and accurate picture of current and predicted costs.

For more drivers to make the switch to electric, we believe it's vital that the roll-out of EV charger infrastructure is tracked as this year we worryingly saw the number of electric vehicles per rapid charger exceed 100 for the first time. Only a fifth of public chargers are currently high-powered so we need to ensure this segment continues to grow at pace to enable drivers to make journeys beyond the range of their vehicles as easily as possible.

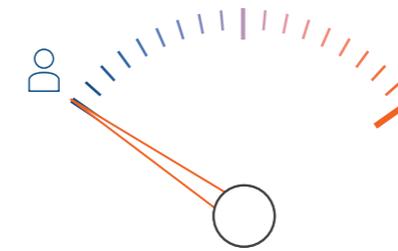
Despite the Government pushing back the ban on the sale of all new petrol and diesel cars and vans, it's imperative we give drivers the best charging infrastructure possible to make switching to zero-tailpipe emissions driving simple. We're also playing our part:



we now have almost 200 RAC vans fitted with our leading EV Boost technology which allows our patrols to get any out-of-charge EV going again.

Innovation has always been synonymous with the RAC brand, and 2023 is no different. We're on a rapid journey to making drivers' lives easier through the use of the very best digital technology available. In addition to helping drivers find the cheapest fuel, everyone who downloads the myRAC app – whether a current member of the RAC or not – can set up reminders for their vehicles' MOT, servicing, insurance and tax, while members can also get the fastest help possible by using the Rescue feature to report a breakdown.

This is yet another step in our journey to delivering 'complete peace of mind' motoring and ensuring that from breakdowns to insurance, repairs to servicing, petrol to electric cars, we are the first choice for all drivers' needs.



1. What's on motorists' minds?

Chronic, long-term underfunding of maintenance works and a particularly cold and wet winter have combined to drive a rapid deterioration in the state of the UK's local roads. As a result, this issue is by some distance the top concern among Britain's drivers.

Almost half (49%) of drivers say the condition and maintenance of local roads in the UK is a top concern in 2023, up from 45% last year and the highest figure on record for this particular issue. This is an even more serious problem for older drivers: of those aged between 45 and 64, 55% say it is their top concern, a figure that rises to 59% among those aged 65 and older.



While maintenance problems appear to be far more acute on local roads, the report has also found rising dissatisfaction with the condition and maintenance of the country's motorways and high-speed dual carriageways: in 2023, 11% of drivers say this is a top concern, up from 8% 12 months ago.

Drivers' views on the conditions of local and high-speed roads, and their opinions on the standard of maintenance works and associated disruption, are analysed in more detail in Chapter 2: The state of our roads.

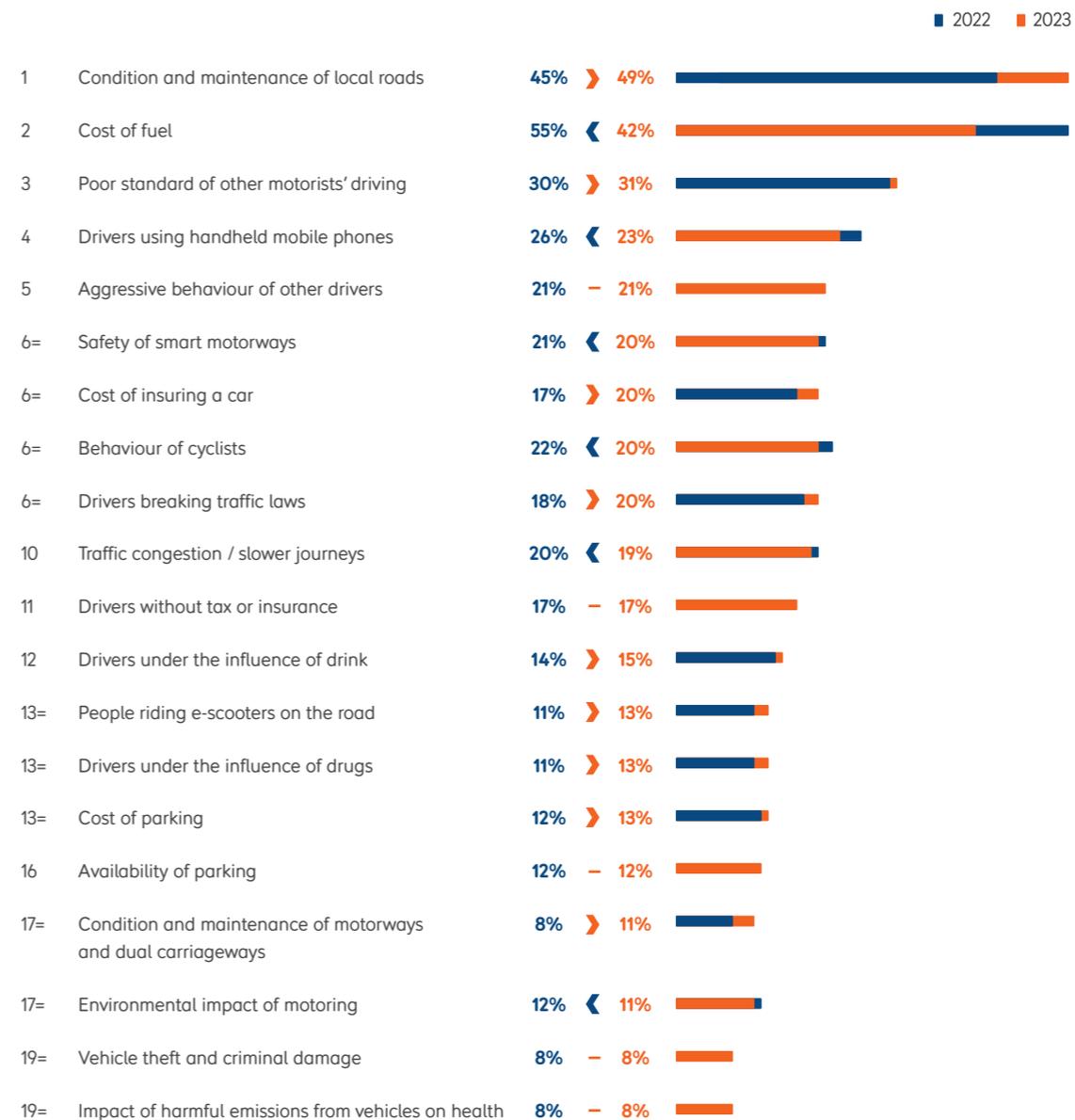
Meanwhile, persistently high inflation and the cost-of-living crisis continue to affect the nation's drivers. Although the price of petrol and diesel has fallen back from last summer's highs, the cost of fuel required to run vehicles is still a top concern for 42% of drivers. This does however represent a sharp fall from the 55% registered in 2022 in the wake of price increases that took the cost of petrol and diesel to what were at the time record highs.

While fuel costs rose further in 2022, peaking in July at an average of 191.5p a litre for petrol and 199.9p a litre for diesel, they have since fallen sharply as the impact of Russia's invasion of Ukraine on global energy and fuel markets has receded. At the end of March 2023 when drivers were surveyed for the Report on Motoring, the average price for a litre of unleaded was 146.50p, with diesel standing at 162.94p – although it should be noted that these rates remain very high in historic terms.

The expense associated with filling up is more of a concern for younger drivers. Among the under-25s, 44% say fuel costs are their top concern, rising to 48% of those aged between 25 and 44 and falling to 42% for those in the 45 to 64 age group. Of drivers aged 65 and older, only three in 10 (30%) say this issue is a top concern, but this may well be influenced by the fact they do not drive as many miles as younger age groups (this year's report shows that only 53% of drivers 65 and above drive more than 5,000 miles a year on average, compared with 71% of those aged under 65).

How have UK drivers' top concerns changed in the last 12 months?

Figures represent proportion of drivers that said the issue was a top concern to them



Drivers are increasingly complaining about the cost of insuring their cars: 20% say this is a top concern this year, up from 17% in 2022. In Chapter 3: The cost of driving, we look in greater depth at the impact of rising motoring expenses, as well as the potentially risky steps drivers are taking to mitigate them.

The dangers posed by fellow road users is another major issue. In 2023, the poor standard of other motorists' driving is cited by 31% of drivers as a top concern, a slight rise on last year's 30% and the highest figure in the four years we have questioned drivers about this specific issue. A further 23% are worried about motorists using handheld mobile phones while driving, although concern about this specific problem has declined consistently since peaking in 2016 at 41%.

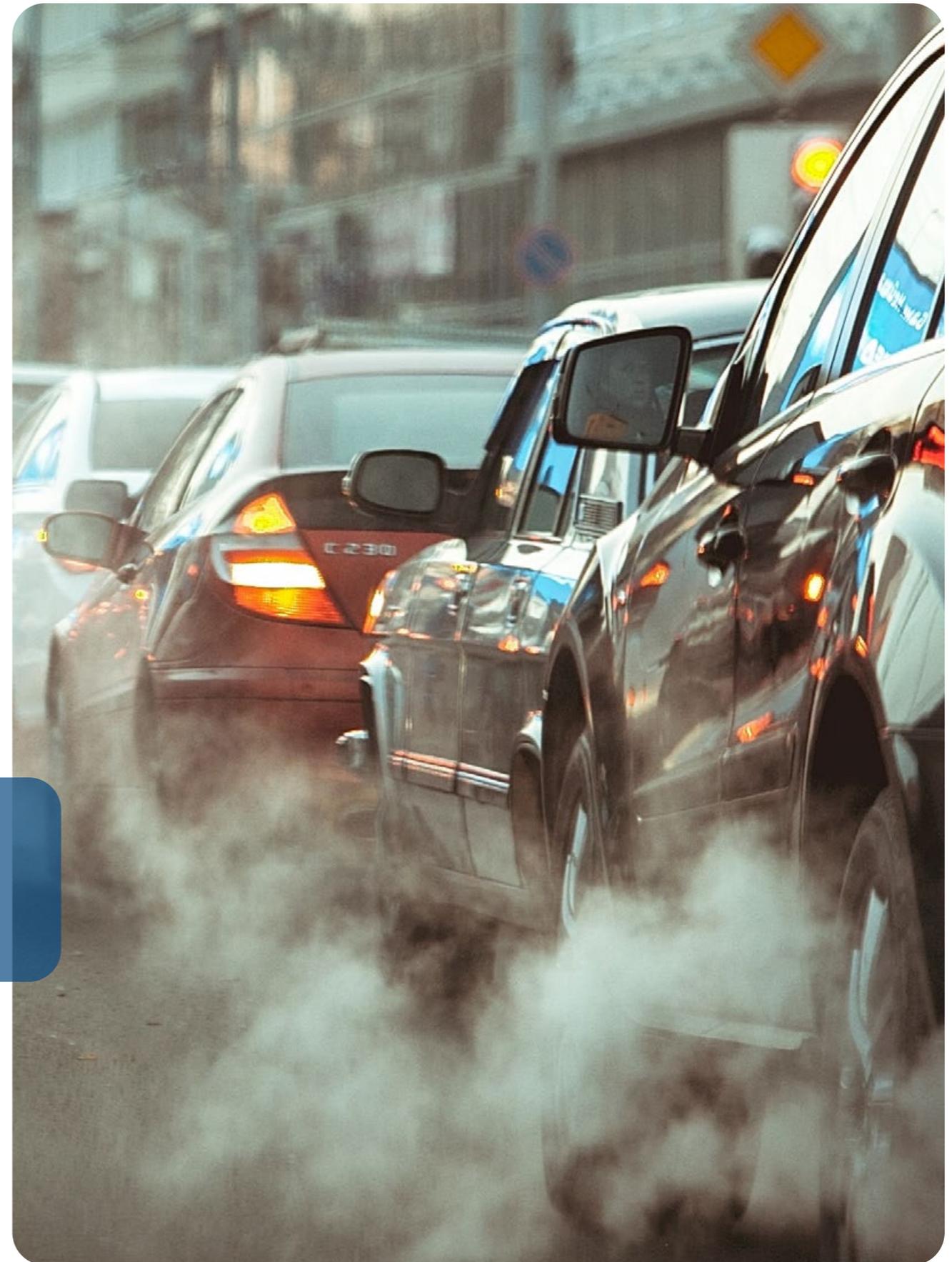
Meanwhile, 21% say other drivers' aggressive behaviour is a top concern (no change on 2022), while a fifth (20%) complain of other motorists breaking traffic laws (up from 18%) and the same proportion cite poor behaviour by cyclists as a top concern (down from 22%). There has also been a rise in concern about the use of

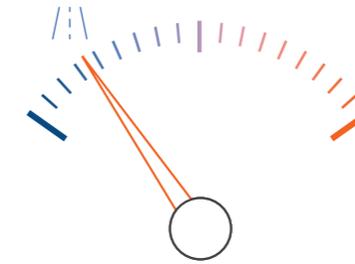
e-scooters on the road in the last 12 months, from 11% to 13%. We look further at these and related issues – including speeding and drink-driving – in Chapter 5: The dangers on our roads.

Concern about the environmental impact of motoring has declined further. This year, only 11% of all drivers say this is a top concern, down from a peak of 16% in 2021. And just 8% are concerned about the health impact of harmful emissions – the same percentage as last year, but well below the 14% high recorded in 2018. However, for drivers of electric vehicles this is the joint fourth biggest concern (27%).

Among other issues, 20% of all drivers are concerned about the safety of smart motorways – a sentiment that has contributed significantly to the recent government decision to halt all plans for future smart motorway projects – while 19% say congestion and slower journey times are a top concern, the lowest level in several years.

'The dangers posed by fellow road users is a major issue'





2. The state of our roads

Britain's drivers have never been so dissatisfied with the state of the country's roads. In 2023, half (49%) say the condition and maintenance of local roads across the UK is their top motoring-related concern, the RAC Report on Motoring has found. This is the highest figure on record for this specific issue, and it is by some way the leading motoring concern this year – some seven percentage points ahead of the next biggest concern, the cost of fuel. It is a particularly significant problem for older drivers: of those aged between 45 and 64, 55% say it is their top concern, while this rises to 59% among those aged 65 and older.

The report also shows that most drivers are unhappy with the general standard of road maintenance works, as well as the disruption to journeys caused by resurfacing operations. Meanwhile, a significant proportion of drivers report having been forced to take potentially dangerous evasive action to avoid potholes.

2.1 Crumbling local roads

A long-term lack of funding for maintenance and repair work coupled with a particularly cold and wet winter in 2022-23 have created the perfect conditions for potholes to pepper the country's roads. Two-thirds of drivers (67%) in 2023 say that the condition of the local roads they regularly drive on has deteriorated in the past 12 months, up from 60% in the 2022 report,

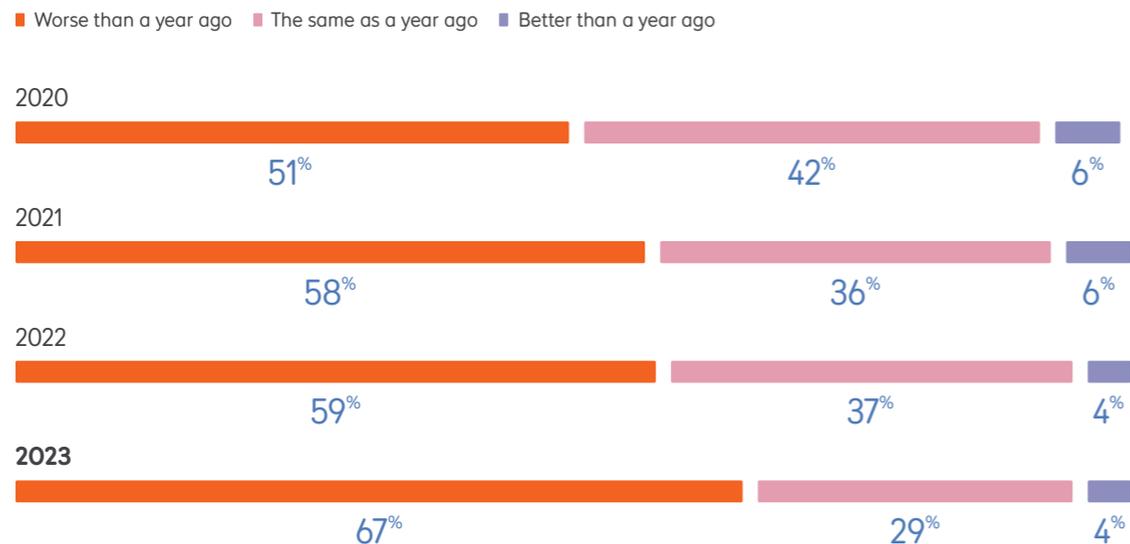
making for the biggest increase for five years. This year only 4% think local road conditions have improved over the last 12 months. While problems with road surfaces are overwhelmingly to blame (cited by 97% of drivers), there are several other factors contributing to this decline, including faded road markings (61%), litter (35%) and poor signage visibility (34%).

The most recent data from the RAC highlights the toll that poorly maintained local roads are taking on the UK's drivers and their cars. RAC patrols were called to assist more than

49% say the condition and maintenance of local roads across the UK is a top motoring-related concern

The standard of local roads is deteriorating at an accelerating rate, according to drivers

Drivers asked: Would you say that the condition of local roads you regularly drive on is...



Evasive action – what drivers are having to do when they approach a pothole

Steered carefully to avoid it by driving partially in another lane/on the other side of the road **81%**

Slowed down considerably to drive over it **69%**

Kept a bigger distance from the car in front so I have more time to react **37%**

Swerved quickly to avoid it and ended up driving partially in another lane/on the other side of the road **35%**

10,000 drivers whose vehicles had been damaged by potholes in the first three months of 2023 – an increase of almost 40% on last year, and more than double the 4,915 pothole-related callouts in the final three months of 2022¹. A 14% increase in the number of wheel-changes that had to be carried out by RAC patrols between the beginning of January and the end of March this year is further evidence of the damage caused by sub-standard road surfaces.

another lane or move onto the other side of the road. Meanwhile, seven in 10 (69%) say they have been forced to slow sharply to drive over a pothole and 37% have tried to maintain a greater distance from the car in front to give themselves more time to react to road-surface problems. More worryingly, just over a third (35%) of drivers report being forced to swerve to avoid a pothole with the result that they have crossed into another lane or on to the other side of the road.

The majority of drivers say they have had to take evasive action to avoid potholes, with 81% stating they have had to steer carefully to avoid one, and at least partially go into

10K The number of pothole-related breakdowns attended by RAC patrols in the first three months of 2023

1. <https://media.rac.co.uk/pressreleases/rac-springs-to-the-aid-of-more-than-10000-drivers-who-suffered-pothole-related-breakdowns-in-first-three-months-of-2023-3248975>

2.2 Funding road maintenance work

While local or national government cannot control the weather, the lack of adequate funding for road repair works remains a significant factor in the ongoing deterioration of local roads. The 2023 edition of the annual report published by the Asphalt Industry Alliance (AIA) again indicates that local

councils in England and Wales continue to face significant shortfalls in the funding required to keep road surfaces in a reasonable condition. The AIA's most recent Annual Local Authority Road Maintenance (ALARM) report², published in March 2023, says that the total amount of money now needed to address the backlog



Expert view
Steve Gooding, director, RAC Foundation

"Tales of damage to wheels and tyres bear out the concern revealed by this survey – our roads are a hugely valuable national asset but they just aren't getting the care and attention they need, and that's a worry for all road users from riders on the smallest scooters to drivers of the largest trucks."

in road maintenance works has increased to more than £14 billion, up 11% from a year ago. According to the AIA, while the additional one-off £200m payment for local road repairs in England announced by the Government in March was welcome, it will do 'little to improve overall structural conditions and stem further decline'.

Where repairs are being carried out, drivers are wholly unimpressed with the quality of the work done: 81% say they do not think roads are resurfaced to a high enough standard, while the same proportion (81%) do not believe roads are resurfaced as often as they should be. The disruption caused by maintenance work is another source of dissatisfaction, with 74% of drivers saying they are frustrated by roadworks taking place on the same road in quick succession and 72% complaining that works frequently overrun.

£14bn The money needed to address the backlog in local road maintenance, according to the AIA

Drivers' views on road maintenance

Strongly agree Slightly agree Neither agree nor disagree Slightly disagree Strongly disagree Don't know

I don't think roads are resurfaced to a high enough standard



I don't think roads are resurfaced as frequently as they should be



I'm frustrated by roadworks taking place in the same area / on same road in quick succession



Roadworks seem to regularly overrun



2. <https://www.asphaltuk.org/wp-content/uploads/ALARM-press-release-for-website.pdf>





Expert view
Theo De Pencier, non-executive director, Transport Focus

"When a road's condition is finally addressed motorists have a strong suspicion that the repairs are not done well enough and/or consistently enough necessitating a second disruptive visit shortly afterwards."

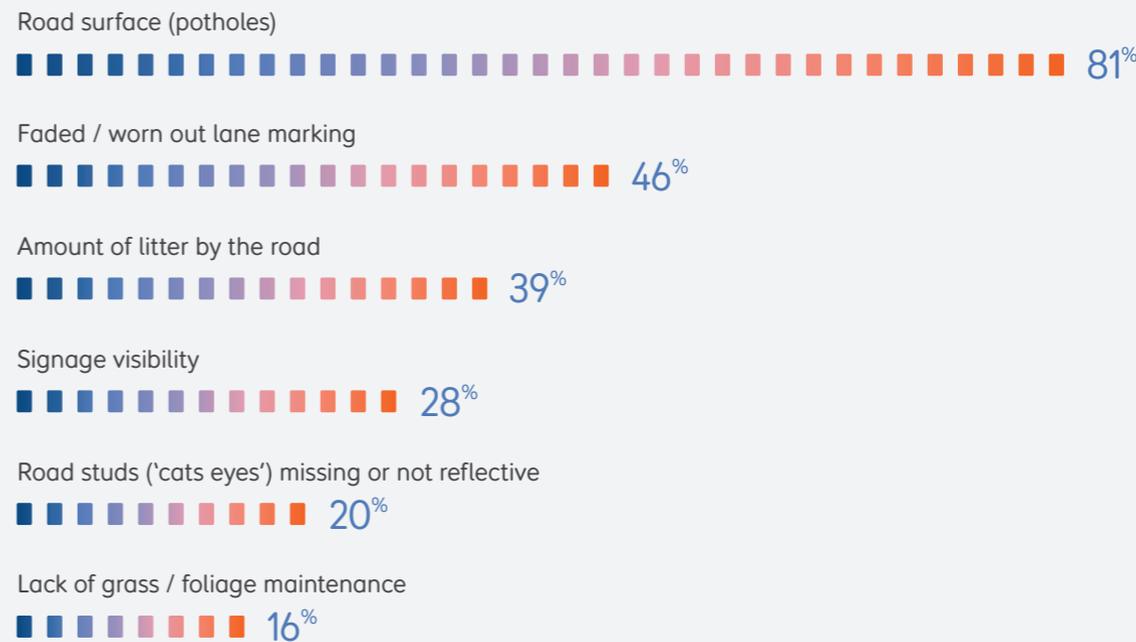


2.3 The state of the UK's motorways

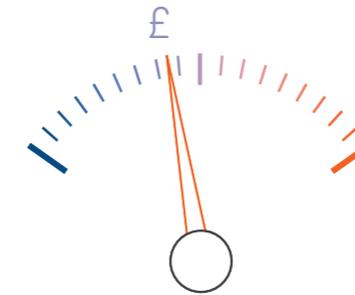
While drivers generally view the condition of Britain's motorways as better than that of local roads, many are frustrated by the level of deterioration they have witnessed. This year, 11% of drivers say this is a top concern, up from 8% in the 2022 report. Among those who use motorways and other high-speed roads, 44%

say their condition has worsened in the past 12 months, up significantly from 38% in 2022. This deterioration is mainly due to worsening road surfaces (cited by 81%), but faded lane markings (46%), roadside litter (39%) and poor signage visibility (28%) are also to blame.

Motorways and major A-roads – how drivers think they are getting worse



Base: of those who think the standard of these roads has worsened over a 12-month period.



3. The cost of driving

Although the price of petrol and diesel has thankfully fallen from the peaks seen in summer 2022, the expense associated with motoring continues to be a major concern for drivers. The 2023 RAC Report on Motoring has found that the cost of filling up is a top concern for 42% of respondents – this is sharply down on the 55% in last year's report, but it remains the second most widespread concern.

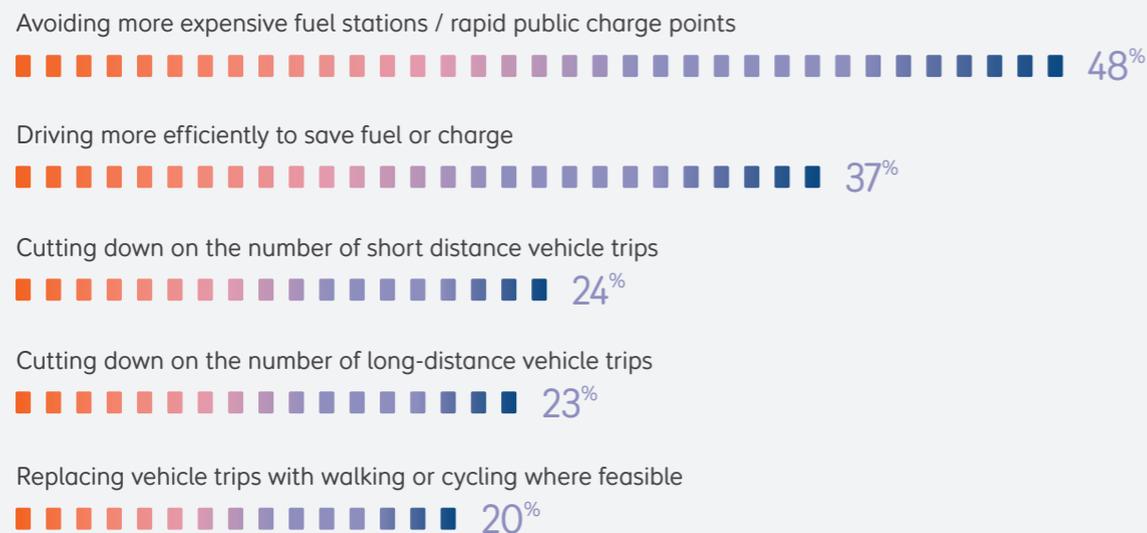
3.1 Fuel costs remain high

At the time fieldwork for the 2022 Report on Motoring was being carried out in May last year, fuel prices in the UK were at then-record highs. They continued to rise until July before peaking at an average of 191.5p a litre for petrol and 199.9p a litre for diesel. Since that point, prices have dropped as the economic impact of Russia's invasion of Ukraine in February 2022 has waned and concerns have grown about a possible slowdown in the global economy,

depressing crude oil prices. When this year's research was conducted in March, the average price for a litre of unleaded had reduced to 148p, with diesel around 167p; both figures are considerably higher than in the years prior to 2022.

48% The proportion of drivers aged 25-44 who say the cost of fuel is a top motoring concern

How drivers are adapting to high fuel and electricity costs



Most drivers have understandably seen increases in their expenditure on fuel (87%) or the electricity needed to charge a battery-powered vehicle (83%) in the past 12 months. The cost of filling up a vehicle is a much bigger issue for younger drivers: among both the under-25s and those aged between 25 and 44, this is the most widespread motoring concern in 2023, cited by 44% and 48% respectively. Among those aged 65 or older, only 30% say the cost of fuel is a top concern.

Over the past year, owners of battery-powered electric vehicles have seen public charging costs rise steadily. While the price of unleaded fell by nearly a quarter between July 2022 and March 2023, the cost of charging a battery electric vehicle away from home remains near all-time highs. According to RAC Charge Watch data¹, the price of charging a 64kWh family-size electric car to 80% at a public rapid charger exceeded £36 in March 2023 compared with less than £23 in May 2022. Meanwhile, in October 2022, the equivalent cost-per-mile rate when using a rapid charger exceeded the equivalent price of running an unleaded car for the first time.

This year's report also asked drivers about the steps they are taking to reduce fuel or charging expenditure. Three-quarters (76%) have taken some form of action to save money because of the high prices at the pumps. Almost half (48%) of those questioned say they have steered clear of more expensive petrol stations or public charging points in order to save money, while 37% are driving more efficiently to cut costs. A quarter (24%) have cut down on short-distance trips by car and a similar number (23%) have reduced long-distance trips. A fifth (20%) say they have attempted to replace vehicle journeys with cycling or walking where possible.

The Report on Motoring research also looked at the impact of last year's spike in petrol and diesel costs on vehicle use. A third of drivers (34%) say they were forced to cut back on some journeys, a figure that rises to 49% among the under-25s, while 15% cut out all but the most essential trips. However, half of drivers (51%) say the price increase made no difference to the number of journeys they made because their trips were essential.



Expert view
Claire Evans, consumer editor, What Car?

"Although the cost of fuel has gone down, drivers are still looking for ways to cut costs. While the cost-of-living crisis is having the least impact on older drivers, it is forcing younger motorists to cut corners in servicing and maintenance. Not only could this result in more costly repairs in the long term, it could also compromise safety."

1. <https://www.rac.co.uk/drive/electric-cars/charging/electric-car-public-charging-costs-rac-charge-watch/>

3.2 Impact of higher insurance premiums

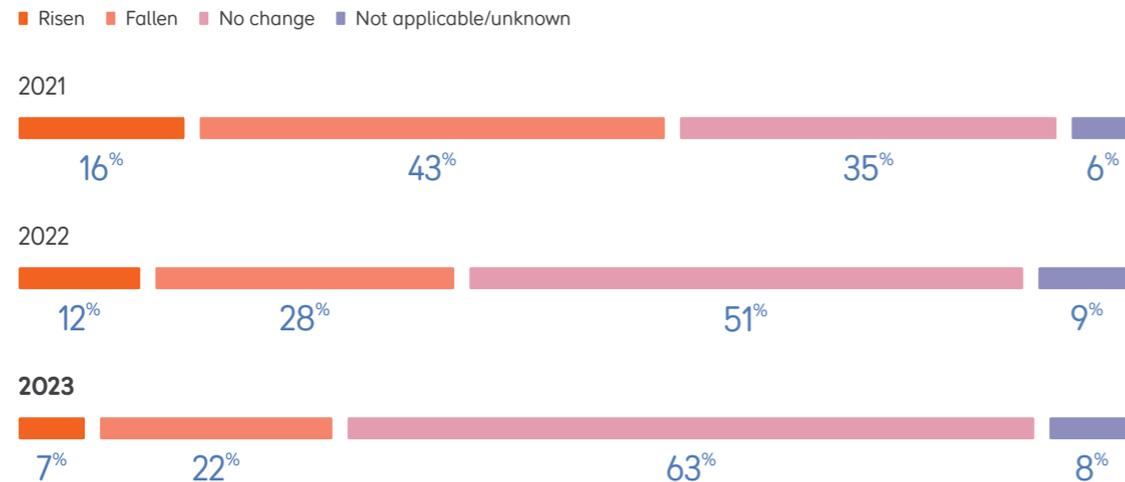
With the UK still in the grip of a cost-of-living crisis caused by the high levels of inflation that have persisted since late 2021, it is unsurprising that the 2023 Report on Motoring has identified several other areas of financial concern to drivers. The cost of insurance premiums, for example, is a top concern this year for 20%, up from 17% in 2022. Among the under-25s, this figure rises to 28%. More than two-thirds of drivers (69%) say their premiums have increased over the past 12 months, compared with 56% who said this in 2022.

Data published by the Association of British Insurers in February 2023² showed that the average price paid for motor insurance in the final three months of 2022 rose by 8% to £470, with rises in the cost of materials and energy used for vehicle repairs partly to blame. Consequently, a fifth (19%) say they have switched to a cheaper insurance provider in order to save money.

'The cost of insurance is a top concern for 20% of drivers'

An increasing proportion of drivers are seeing their insurance premiums rise

Drivers asked: 'Over the past 12 months, how, if at all, have your vehicle insurance premiums changed?'



² <https://www.abi.org.uk/news/news-articles/2023/2/rising-cost-pressures-push-up-the-price-of-motor-insurance/>

3.3 The rising price of parking

While the cost of parking was only a top concern for 13% of drivers – rising to 27% among those under 25 – seven in 10 (71%) think that general parking charges have increased in the past 12 months (68% last year) and 63% of those who have residents' parking permits claim they are now having to pay more, compared to the 57% who stated this last year.

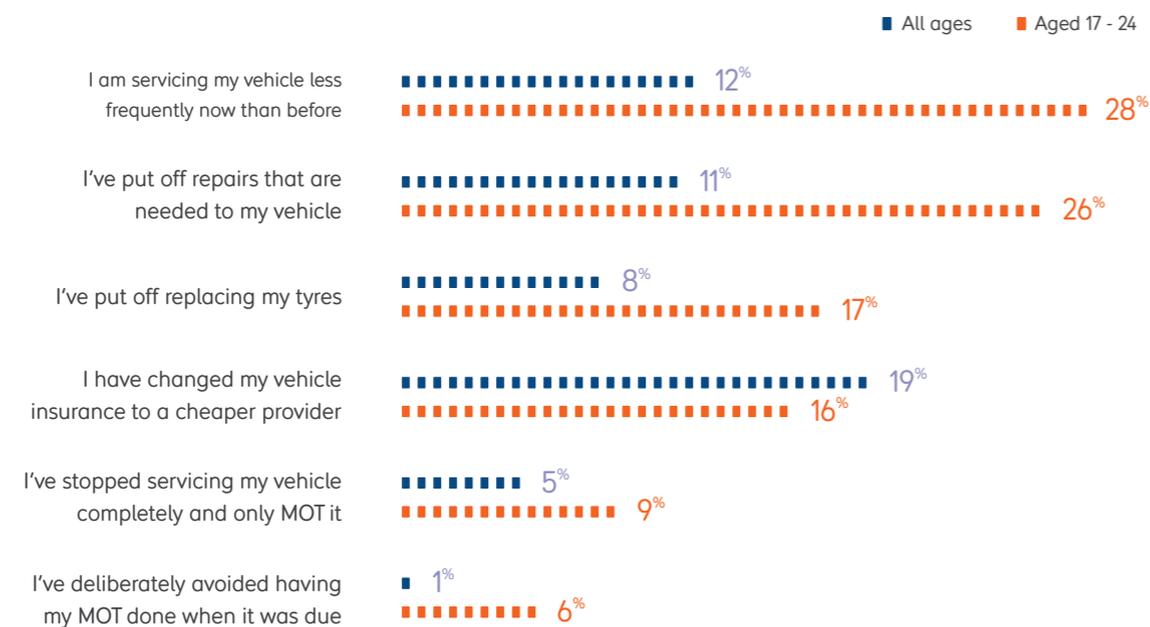


3.4 Skimping on servicing, maintenance and repairs

Sixty-nine per cent say the cost of servicing and repairing their vehicles has risen in the past year (62% in 2022). This appears to have caused drivers to reduce the amount they spend on looking after their cars with a quarter (24%) admitting to having taken some cost-cutting steps at the expense of properly maintaining their vehicles. Worryingly, this figure rises dramatically to 58% among those under 25 whereas just 9% of drivers aged 65 or older say they have tried to save money by delaying some form of servicing or repair work in the past 12 months.

Of all drivers, 12% say they are servicing their car less frequently than before while 11% have delayed necessary repairs. Among the under-25s, these figures are 28% and 26%, respectively, while 17% of this group has put off having tyres replaced due to a lack of cash compared to fewer than one-in-10 (8%) of all drivers. Nine per cent of young drivers also admit to having stopped servicing their vehicles altogether and are only putting them through the MOT while 6% have taken the illegal step of deliberately avoiding having the MOT done. This compares to 5% and 1% respectively among drivers of all ages.

Young drivers are much more likely to cut back on looking after their cars



Indy, mobile mechanic since 2022, West Midlands



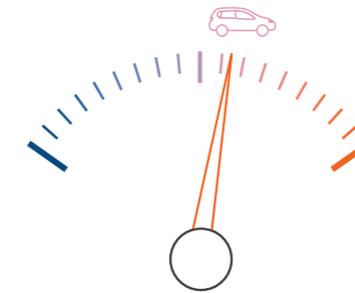
Expert view
David Leibling, transport and motoring consultant and founder of the Report on Motoring

"Seventeen to 24-year-olds have been hardest hit by the cost-of-living crisis, cutting back on servicing, which is potentially dangerous, but offset by their using their cars less. Although most motorists have changed their behaviour to save money, their reliance on their vehicles is unchanged with over 80% saying they would find it difficult to adjust their lifestyle to being without a car."

Although recent government proposals³ to increase the gap between mandatory MOTs for older vehicles from 12 months to two years could in theory save drivers a small amount of money, RAC research suggests that a clear majority of drivers do not support this policy, viewing it as potentially dangerous due to the

likely increase in the number of unroadworthy vehicles in circulation. At the same time, many drivers believe such an approach could prove to be a false economy if it resulted in problems going undetected for longer, and ultimately costing more to repair.

3. <https://media.rac.co.uk/news/mot-rules-could-be-eased-to-cut-costs-rac-reaction-460474>



4. Next car choice

The financial pressures facing Britain's drivers mean that an increasing number do not know when they will be able to upgrade to another car, the 2023 Report on Motoring has found.

What's more, the current economic situation appears at least partly responsible for a halt in the growth in popularity of battery-electric vehicles seen in recent years, with such cars seen as typically more expensive to buy – even though the day-to-day running costs can be much lower than an equivalent petrol or diesel car.

However, a substantial number of drivers expect to be owners of electric vehicles by 2030. Meanwhile, there is general support for the Government's plans to tax drivers of electric vehicles from 2025 – even from some electric car owners themselves.

4.1 Buying a new vehicle

According to the 2023 report, four in 10 (39%) drivers have no plans to buy another car yet. This compares with 37% a year ago and just 33% in 2020. More than a third of drivers (34%) say they had been planning to upgrade their vehicle but financial constraints mean they are no longer in a position to do so. At the moment, only 44% of drivers expect to change cars in the next three years, down from 49% in 2020.

Older drivers are by far more likely to stick with their current vehicle for longer: more than half (56%) say they do not know when they will make a change, compared with 20% of under-25s and 32% of those aged between 25 and 44. However, this is likely to be at least partly due to the fact that older drivers typically use their cars less, and also because many of them already own a vehicle that meets their needs.

There has been little change this year in the proportion of drivers who plan to buy a brand-new or used vehicle: 25% say their next car will be brand new (26% in 2022), while 51% expect to buy second-hand (no change). Among buyers of brand-new cars, there has been a small increase in 2023 in those who plan to buy outright, up from 45% last year to 51%. A further 22% intend to use a finance package such as a personal contract purchase (PCP) deal to acquire a brand-new model.

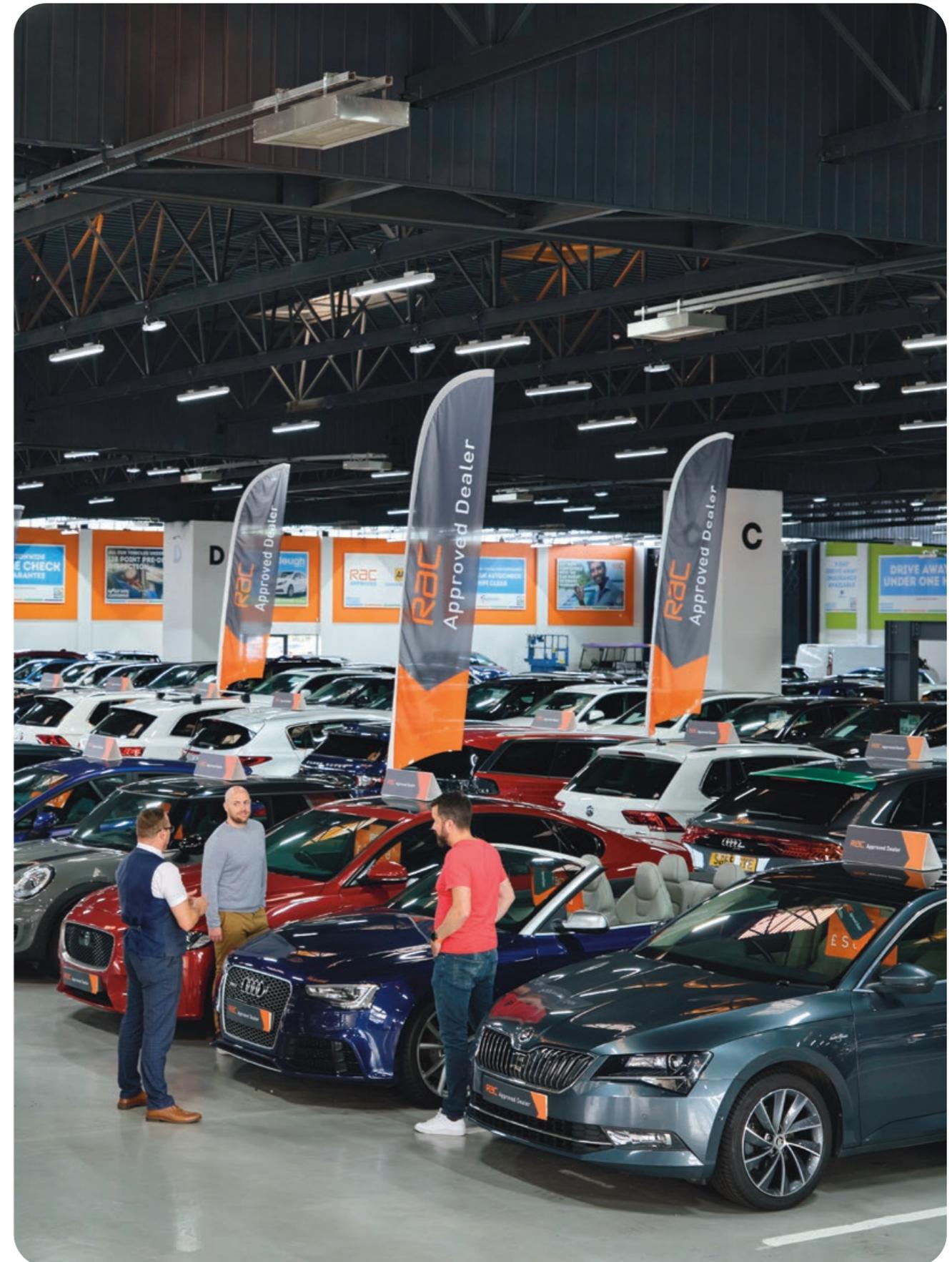
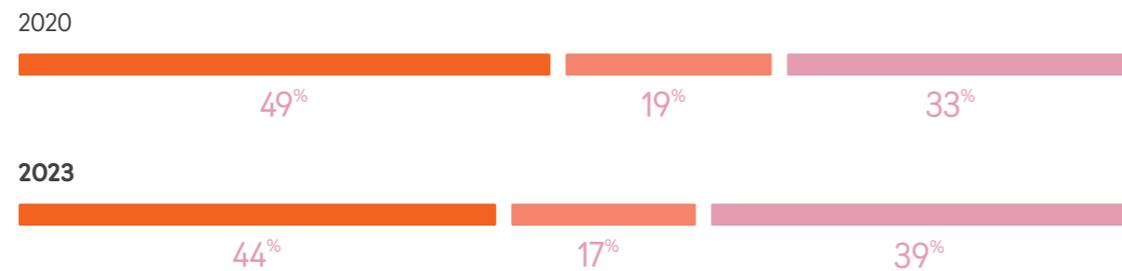
34%

say the rising cost of living has prevented them from changing their current vehicle sooner

Drivers are increasingly putting off upgrading their vehicles

Drivers asked: 'When do you think you'll next change your vehicle, if at all?'

■ In next three years ■ In more than three years ■ No plans / don't know yet



4.2 Electric car growth stalls

After several years of increases, the number of drivers who plan to buy a battery-electric car next has plateaued in 2023: having risen from 2% in 2017 to 14% in 2022, the figure has slipped to 13% in 2023. The percentage planning to buy a petrol car next is 41%, unchanged from 12 months ago, while there has been a small rise (from 13% to 14%) in the proportion of drivers who intend to choose a diesel model. The popularity of conventional hybrid cars remains the same as in 2022 (19%), while there has been a small increase, from 10% to 11%, in those who say they will buy a plug-in hybrid car

2035

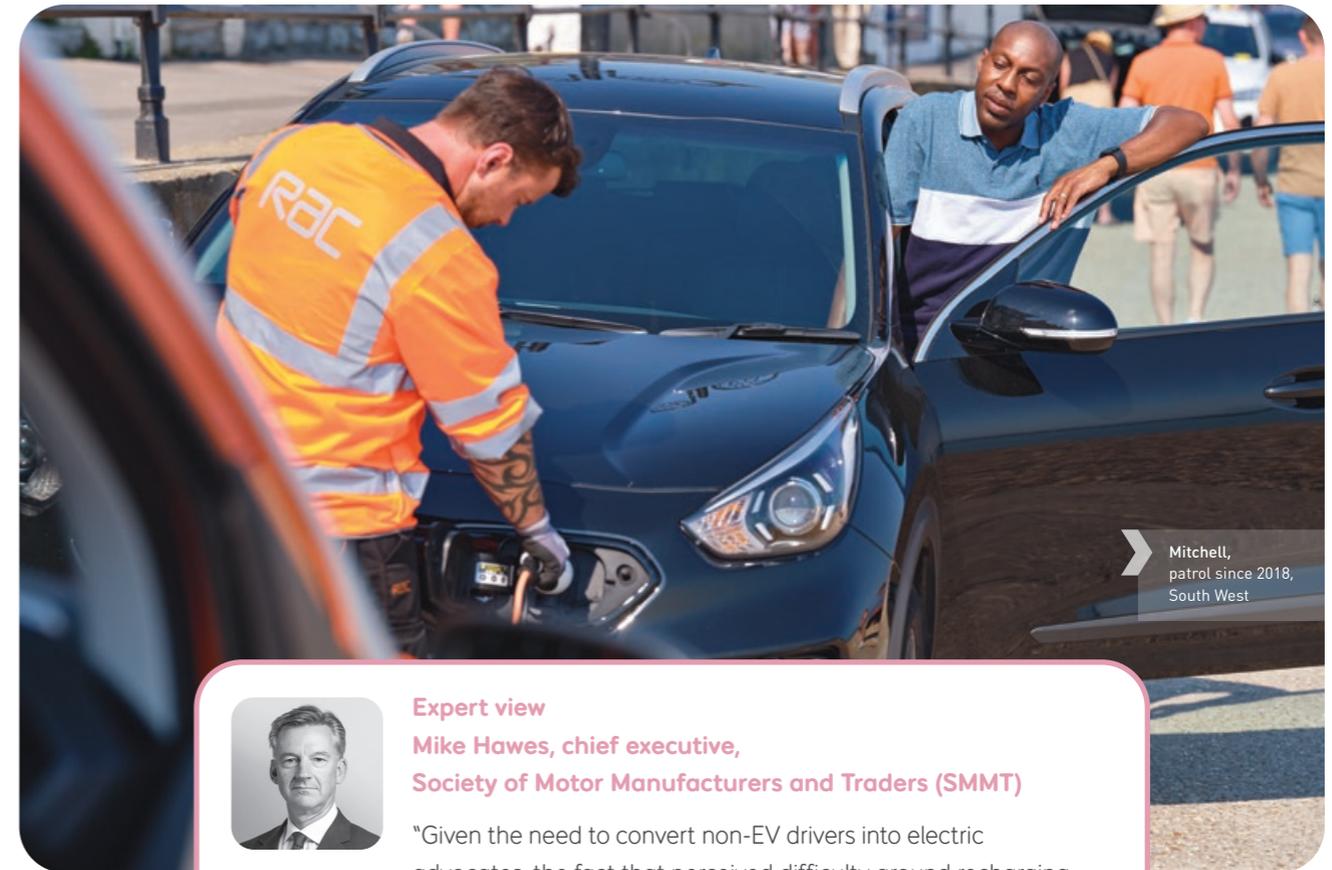
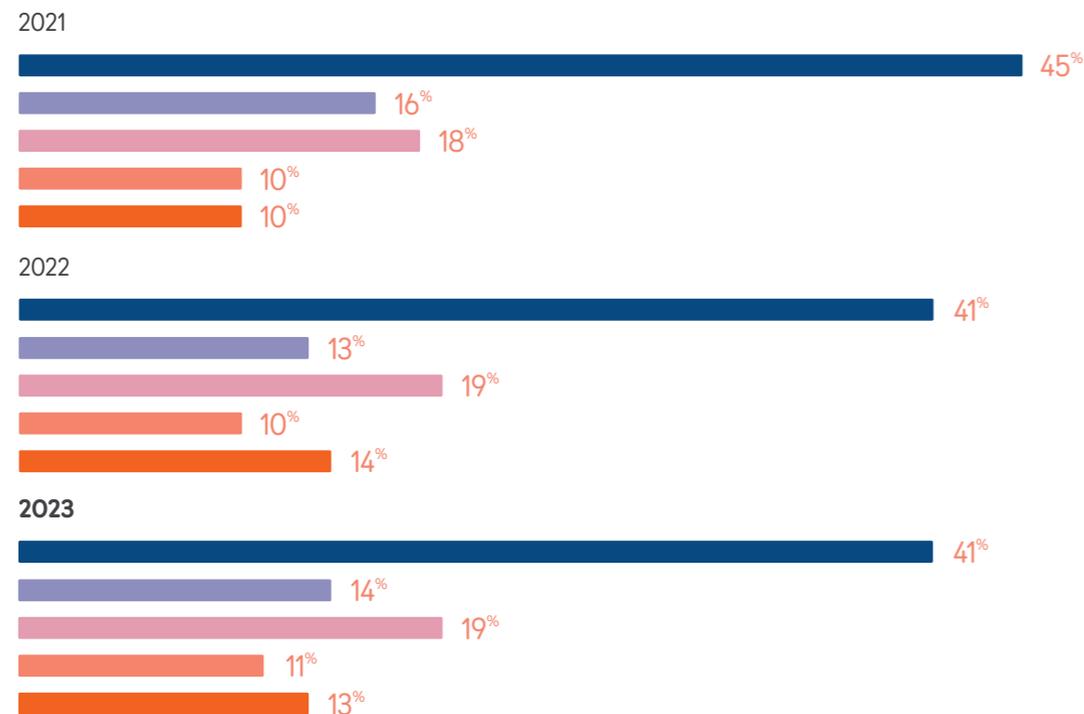
The date when the sale of new petrol and diesel cars will end

next. Looking to the longer term, 43% of drivers expect to be in some form of electrified vehicle – whether a plug-in car or a hybrid – by 2030. Among drivers who do intend to buy a pure electric car next, there has been a sharp fall in the number who say it is because running costs

Drivers' choice of next vehicle

Drivers asked: Which type of vehicle are you most likely to buy next time you decide to change your car?

■ Petrol ■ Diesel ■ Conventional hybrid ■ Plug-in hybrid ■ Battery electric



Mitchell, patrol since 2018, South West



Expert view
Mike Hawes, chief executive,
Society of Motor Manufacturers and Traders (SMMT)

"Given the need to convert non-EV drivers into electric advocates, the fact that perceived difficulty around recharging is getting worse is a barrier to take up. Perception is reality here and we need to build ahead of need to provide the reassurance for all drivers that EVs are a practical and realistic alternative to fossil fuels."

are lower (from 64% in 2022 to 47%). Meanwhile, fewer of those who plan to buy electric next say this is on environmental grounds (52% compared with 57% in 2022 and 66% a year earlier). Indeed, 28% of those who intend to choose an electric car say this is because they already own such a vehicle, up from 11% 12 months ago. Being able to charge their vehicle at home is another significant reason why drivers have opted for electric (50%).

Given the important role that policymakers expect battery-electric cars to play in helping the UK achieve its carbon-reduction targets,

it is useful to understand why interest in this area of the market has stalled. Looking at the reasons why a large majority of drivers (87%) do not plan to buy a battery-electric car next, a perceived lack of public charging points (61%) and their reliability (53%) remain the most common explanations. However, this year more drivers cite the rising cost of electricity (51% compared with 47% in 2022) and difficulties in making long journeys (50%, up from 46%) as barriers to going electric. Similarly, half (50%) of drivers not planning to get an electric model next say it is because they are waiting for battery technology to improve to extend

the range of electric vehicles. Overall, drivers say they would require a vehicle to travel for almost 370 miles on a single charge before they would consider making one their main car – a figure that has stayed remarkably static in recent years. However, it is worth noting that at present there are very few electric vehicles on sale in the UK that have a real-world range that approaches or even exceeds this figure, with the average range of new electric vehicles coming onto the market in 2023 standing at almost 300 miles.¹

Fewer drivers have been deterred by the high purchase price of electric cars (36%, down from 38% in 2022 and 57% in 2021), or by a lack of vehicle choice (17% compared with 20% last year and 25% in 2021). More than two-thirds (69%) say they would only buy an electric vehicle if they could charge it at home in a garage or on a private driveway. This brings into sharp focus the need to support drivers without either: on-street (most likely lamp post) chargers are one option, as are innovative solutions

'Rising cost of electricity a barrier to going electric'

such as those where a cable is run from a home charger through a dedicated gully in the pavement to reach the electric car.

Finally, only a minority of drivers (44%) think that, over the vehicles' lifetimes, electric cars are better for the environment than petrol or diesel models. However, there is a compelling body of evidence to support the overall environmental benefits of electric vehicles when compared to conventionally fuelled cars – with the RAC having already commissioned its own research to debunk common myths around brake and tyre dust pollution.²



Expert view
Quentin Willson, founder, FairCharge and motoring journalist

"High charging costs and persistent energy inflation has reduced the financial benefits of EV ownership for many. It is within the Government's gift to reduce the 20% VAT currently levied on public charging to the same 5% levy as domestic charging. FairCharge has told The Treasury that the cost would be £38 million at current rates of adoption which is a fraction of the billions spent supporting fuel duty."

Current electric drivers' views

Among drivers who already own a battery electric vehicle, there is a considerable level of dissatisfaction with the current state of the UK's charging infrastructure. Only 43% of this group believe it is easy to use public charging points, while 79% report finding public charging points not working when they are needed.

More than half (54%) say they have had to wait for a public charging point to become available on several occasions over the past 12 months, while 42% say the increased cost of public charging means they are using this type of charging less. That said, 70% of drivers believe it is reasonable that the fastest public charging points should cost more to use, while 88% say more of these devices should be added to the national network to make charging easier and more convenient for everyone.

A significant majority (82%) think there are too many different apps and websites used to administer public charging points, while three-quarters (74%) of electric car drivers say the rate of VAT levied on electricity supplied by public charging points should be cut from 20% to 5%, in line with the rate on domestic power. Nonetheless, only 17% say recent rises in the cost of electricity have made them consider reverting to a petrol or diesel vehicle.

1. <https://media.smmmt.co.uk/battery-electric-car-choice/>

2. <https://www.rac.co.uk/drive/electric-cars/running/do-electric-vehicles-produce-more-tyre-and-brake-pollution-than-petrol-and/>



4.3 Tax on electric vehicles

The Government intends to start imposing vehicle excise duty (VED) on electric cars from 2025 – £165 a year for electric vehicles registered after April 2017 and £10 for the first year for cars registered from April 2025³. This policy has wide support among drivers in general: almost three-quarters (73%) say they think this is a fairer approach to taxation, while 59% feel it is unjust that electric car owners

pay less tax than other drivers because they do not have to pay fuel duty. Among owners of battery-electric vehicles, these numbers are 34% and 18% respectively.

There has been speculation recently that the Government's overall approach to road taxation may need to change given the inevitable falls in future fuel duty receipts as electric vehicle ownership becomes more widespread. One of the most likely options is that drivers would be charged for the number of miles they drive. This year's report shows that 14% of drivers back such a change being introduced by 2024, while a majority of drivers (55%) say they support this policy being introduced by the end of the current decade. A fifth (21%) however say they are opposed to such a policy being introduced at any time.

'Unjust that electric car owners pay less tax'

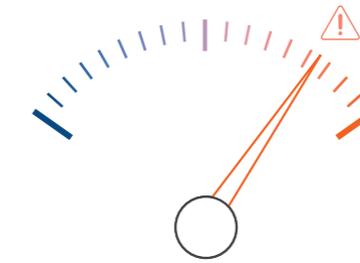
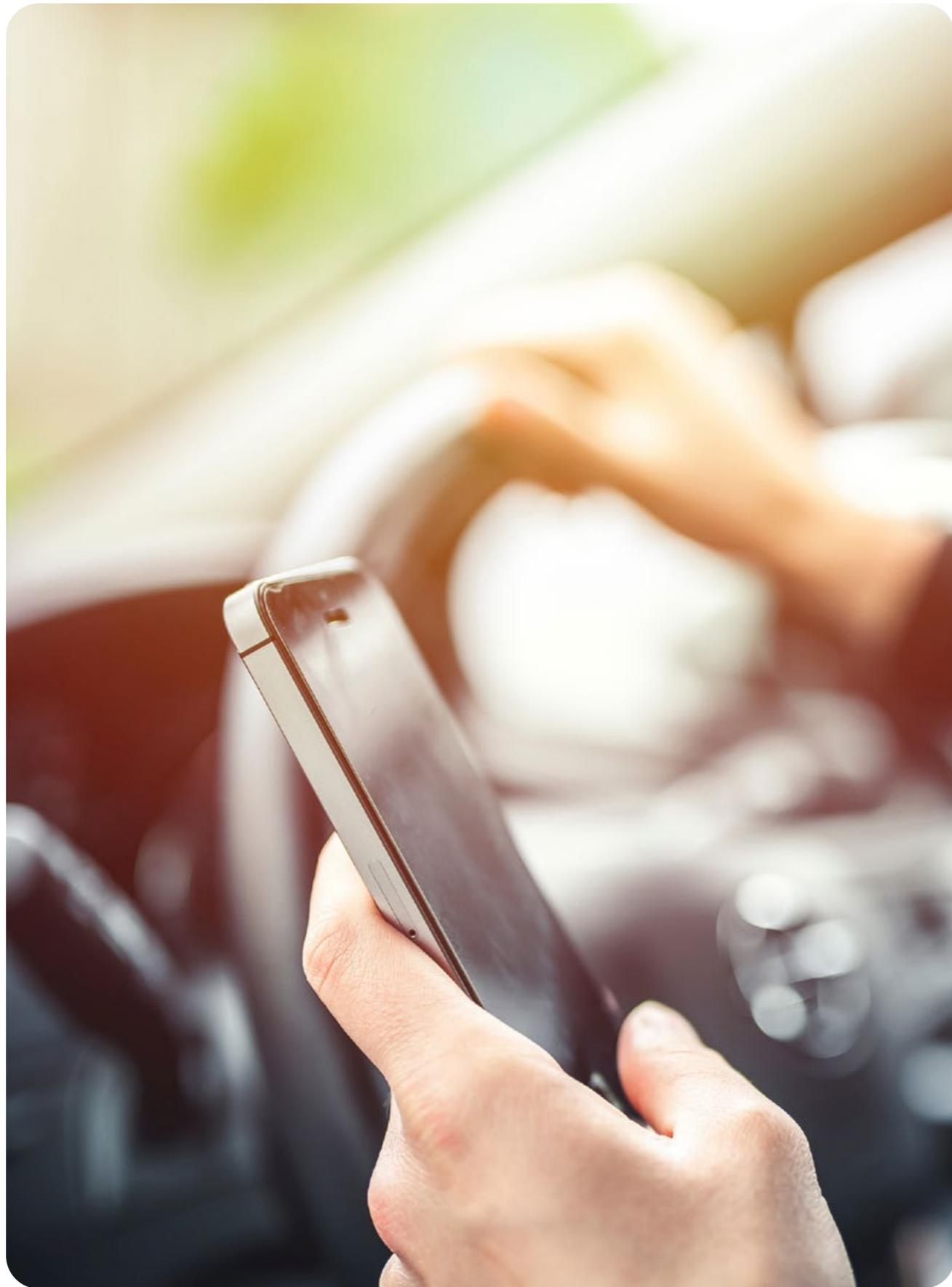


Expert view

Melanie Shufflebotham, chief operating officer and co-founder, ZapMap

Concern over lack of charge points particularly for longer journeys remains the number-one issue for those not yet driving electric. The good news is the number of ultra-rapid charge points, ideal for en-route charging, has increased by more than 90% over the past year and there are many more planned for the second half of 2023 and beyond."

3. <https://www.gov.uk/government/publications/introduction-of-vehicle-excise-duty-for-zero-emission-cars-vans-and-motorcycles-from-2025/introduction-of-vehicle-excise-duty-for-zero-emission-cars-vans-and-motorcycles-from-2025>



5. The dangers on our roads

Other motorists' dangerous behaviour - from handheld mobile phone use to aggression at the wheel - is a significant concern for drivers in 2023, the RAC Report on Motoring has found. As discussed in Chapter 1: What's on motorists' minds, a number of issues relating to the carelessness or recklessness of road users are major concerns for drivers this year. Almost a third (31%) say the poor standard of other people's driving is a top concern - the highest figure in four years - while 21% complain of aggressive behaviour from other drivers, and a similar proportion (20%) say they are worried about other motorists breaking traffic laws in general.

More specifically, 23% of drivers are concerned about others using handheld mobile phones illegally – a percentage that rises to 29% among those aged 65 and older – although overall concern about this issue is waning slightly (see below). Meanwhile, fewer drivers admit to having broken the speed limit over the past 12 months, although there is still a widespread view that there are not enough police on the roads to effectively enforce driving laws.

One in five drivers (20%) says that the safety of smart motorways is a top concern in 2023. Given the risks associated with the 'all lane

running' configuration of smart motorways – in particular the dangers facing motorists who break down some distance away from a refuge area – the RAC welcomes the Government's recent decision to halt all plans for smart motorway projects on the grounds of public concern as well as cost.

20% The proportion of drivers who say the safety of smart motorways is a top concern



5.1 Handheld phone use: Still cause for concern

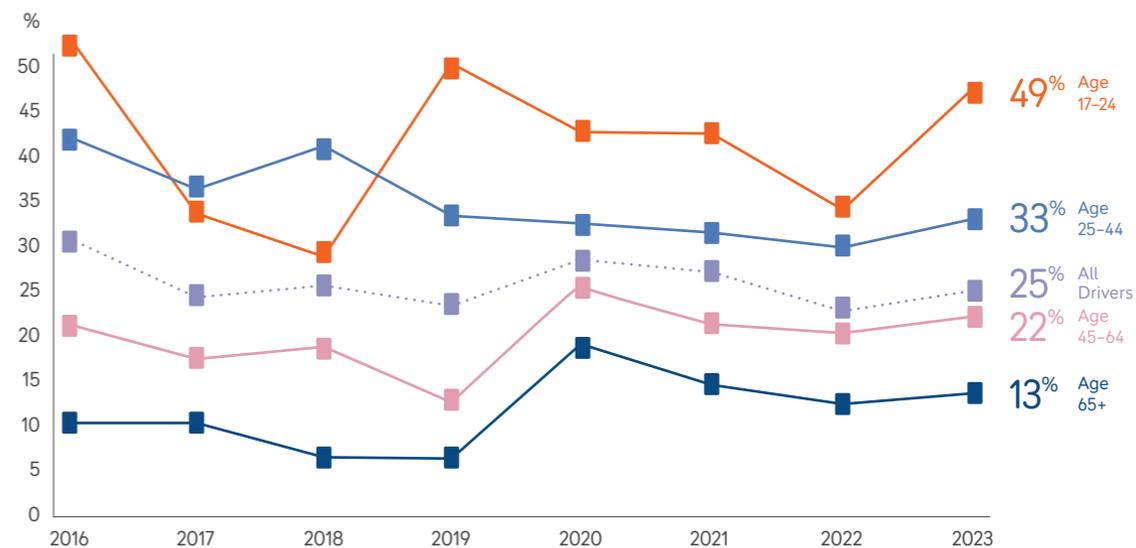
While the illegal use of handheld mobile phones by other motorists is a significant worry for Britain's drivers, concern about the issue has reduced a little in recent years. In 2016, 2017 and 2019, this was found to be the most widespread motoring-related concern, cited by 41%, 40% and 36% of drivers respectively. Both last year and this, illegal phone use has ranked fourth in the overall list of concerns.

In general, research for the Report on Motoring has seen compliance with the law relating to motorists' mobile phone use improve over

the past seven years, and it should be noted that high levels of media coverage of the issue resulting from its findings in 2016 led to new penalties being introduced in 2017. However, there has been a worrying increase this year in the number of drivers who admit to regular handheld mobile phone use to make or receive calls, with 12% saying they do this 'all the time', 'most of the time' or 'sometimes', up from 10% in 2022. A further 13% say they 'rarely' make or receive calls in this way while driving (12% in 2022).

Over time: The proportion of drivers admitting to making or receiving illegal voice calls while driving

This year has seen a sharp rise in the proportion of young drivers admitting to illegal phone use.



Non-compliance is particularly notable, and rising, among the under-25s: in this age group, almost half (49%) admit to using a handheld phone for calls while driving, up significantly from 34% last year – the corresponding figure for those aged 65 or older is 13%. Shockingly, three-in-ten (30%) of under-25s say they have engaged in a video call while driving – almost double the 17% reported in 2022 – while 19% of this group have taken a photo or recorded a video while at the wheel (16% in 2022). It is possible that some of the public messaging relating to the dangers of phone use that was so effective in increasing compliance from 2017 onwards needs to be repeated for the benefit of the younger generation.

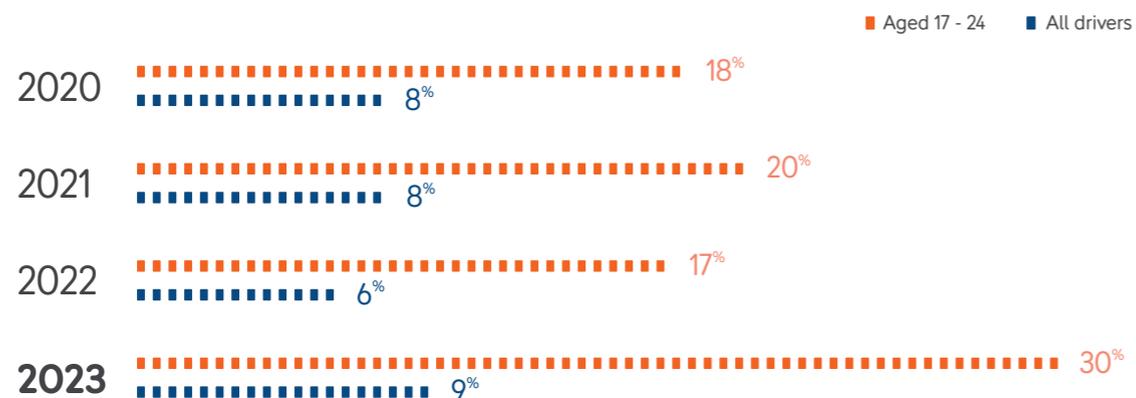
Most drivers who admit to some form of illegal phone use (60%) say they only do so in stationary traffic where, they believe, such behaviour is not very dangerous – despite this still being illegal. A further 12% maintain they can safely hold and use a mobile phone and drive at the same time.

30% of under-25s say they have engaged in a video call while driving

The motoring public's tolerance of mobile phone use at the wheel is low, the report has found: 95% of drivers agree that people who talk on handheld mobile phones while driving are putting others' lives at risk, while 85% believe there is never any excuse for using a handheld phone for any purpose while driving. The findings relating to people who illegally check their phones while in stationary traffic are less clear cut, however. A third (33%) of drivers do not think such behaviour endangers other road users, while 48% believe it does

Drivers admitting to video calling while driving

Young drivers are far more likely to say they have video-called while driving, compared to average.



1. www.rac.co.uk/drive/news/infrastructure/is-this-the-end-for-smart-motorways-in-the-uk/
 2. www.gov.uk/government/news/double-penalties-for-motorists-using-mobiles



Expert view
Tony Kildare, chief executive, IAM RoadSmart

"The huge increase in video calls when driving shows once again that if phones have new features then young people, in particular, will use them and legislation will just have to keep playing catch-up."

5.2 Drink-driving decline continues

The number of people who admit to driving while over the drink-drive limit remains relatively low: in 2023, just 7% of drivers say they have done so, the same proportion as last year and only slightly higher than the 6% recorded in 2021. These figures are well below the 19% reported in both 2018 and 2019, and it is perhaps possible that the pandemic and resulting lockdowns have resulted in permanent changes in attitudes to drink-driving.

This year's report found that 20% of drivers are teetotal, and drivers aged under 25 are most likely to be non-drinkers (28%). Of those who do drink alcohol, 56% never risk drinking and driving, either because they have a zero-alcohol policy when driving or because they do not drive to social functions. A further third (33%) say they may drink at social occasions before driving home, but would have no more than one small drink – and would not drive while over the limit. However, 13% say they would typically have at least one large alcoholic drink – such as a pint of beer or lager, or a large glass of wine or large measure of spirits – and then drive home.

28%

of drivers aged under-25 are non-drinkers

Policies on drinking and driving – younger vs older drivers

Drivers asked: 'Thinking about times when you drive to go out with family, friends or for another social occasion where alcohol will be served, which of the following typically apply to you?'

■ Aged 65+ ■ Aged 17 - 24



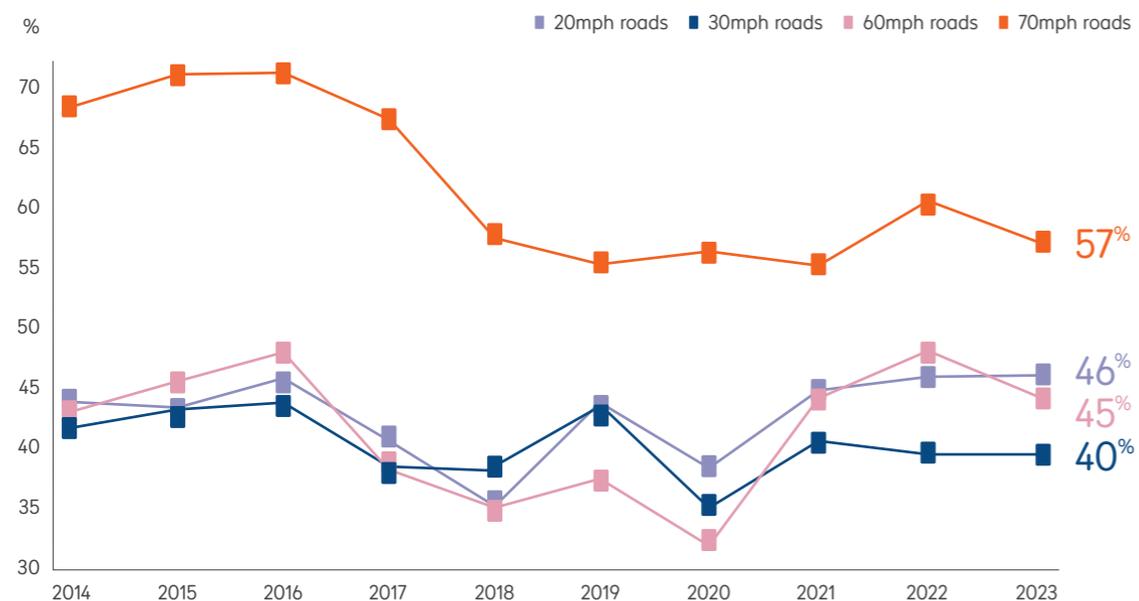
5.3 Speeding compliance improves – but only on faster roads

Fewer drivers admit to breaking the speed limit on the UK's motorways or 60mph roads in 2023. It is possible that the higher fuel and electric vehicle charging prices seen over the last 12 months have persuaded motorists to make greater efforts to drive at a safer – and less expensive – pace.

The number of drivers who say they frequently or occasionally exceed the motorway 70mph limit has fallen to 57% this year from 60% 12 months ago. On 60mph roads, 45% admit to speeding compared with 48% in 2022. There has been no change in reported speeding on urban 30mph or 20mph roads, however.

Drivers do not support the idea of changing the default urban limit from 30mph to 20mph. Six in 10 (57%) oppose such a policy and a quarter (24%) are in favour of it, although support rises to 33% among drivers who live in urban areas. More than four in 10 drivers (43%) would prefer speed cameras to speed humps to be used to enforce 20mph limits. Finally, 63% believe there are not enough police on the roads enforcing driving laws, a figure that rises to 67% among drivers aged 65 and older.

Proportion of drivers who admit to frequently or occasionally speeding

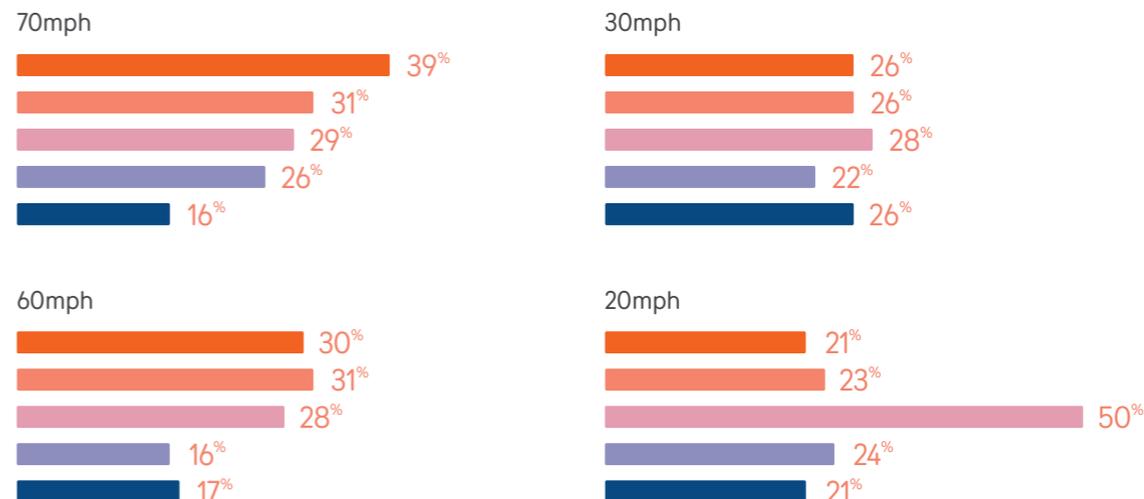


Reasons drivers give for breaking the speed limit

Drivers who admit to speeding were asked: 'You said you frequently or occasionally break the speed limit. What are your main reasons for this?'

- I drive according to the speed of other road users
- Very few other vehicles and/or pedestrians on the road
- The speed limit is inappropriate for the road
- I feel pressured by other drivers behind me
- I don't look at the speedometer frequently enough

Of those drivers that admit to speeding on these roads.





5.4 Dissatisfaction with Highway Code changes

The report also asked drivers for their views on the new hierarchy of road users introduced in the most recent edition of the Highway Code in January 2022. The new system is based on the view that those road users who can do the greatest level of harm have the greatest responsibility to reduce the danger they pose to others. This means, for example, that pedestrians have the right of way over vehicles when crossing at junctions. A clear majority of drivers (71%) say they now give way to pedestrians who are waiting to cross at a

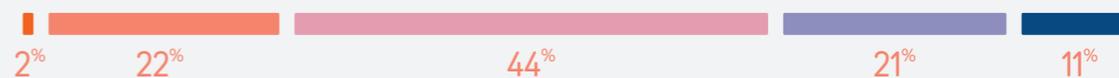
junction. However, only 24% say that, when they are on foot, they find other drivers willing to let them cross in such situations. Worryingly, only 18% of drivers believe that last year's Highway Code changes have increased pedestrian safety, while 31% think pedestrians now face greater danger as a result.

18% The proportion of drivers who think 2022's Highway Code changes have made the roads safer for pedestrians

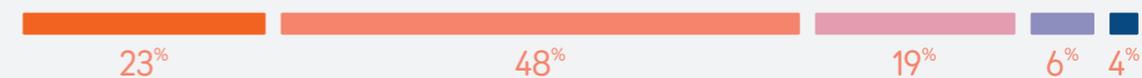
Giving way to pedestrians at junctions – what pedestrians experience, compared to what drivers do

■ Yes, all of the time ■ Yes, most of the time ■ Yes, but not very often ■ No, never ■ Don't know

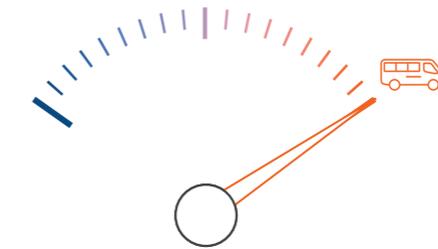
Pedestrians observing drivers giving way at junctions



Drivers admitting to giving way to pedestrians at junctions



3. <https://www.rac.co.uk/drive/advice/legal/new-highway-code-rules-what-you-need-to-know/>



6. Car dependency and mobility

The UK's drivers remain highly reliant on their vehicles, the 2023 Report on Motoring has found. This year, 82% agree they would find it very difficult to adjust to life without a car, a slight rise on the 81% recorded in 2022 and in line with the typically high level of agreement with this statement seen throughout the report's history. Dependency is even greater among those who live in less densely populated locations, with 91% of drivers based in rural areas or villages saying they would find it hard to live without their vehicle.

For the first time in several years, however, most drivers would use their cars less if they could rely to a greater degree on buses or trains: 55% say they would be willing to use public transport for more journeys if the level of service, in terms of reliability, convenience or affordability, was better, a rise on the 48% recorded in 2022. As things stand, however, just over a quarter (27%) of drivers believe that public transport is a viable alternative to using their own cars to make journeys. Meanwhile, more than half of drivers (53%) say they now generally walk or cycle on short journeys rather than travelling by car, a similar figure to last year (52%).

6.1 Public transport and cycling

The number of drivers who use the UK's bus services at least once a month has increased sharply this year to 26% from 17% in 2022, and 21% in the two preceding years. This may reflect a return to higher levels of office-based working following the pandemic, although the Government's decision to provide subsidies so that bus fares on many routes in England outside of London will be capped at £2 per trip until this autumn could also have played a part¹. The £2 cap was originally scheduled to run for the first three months of 2023, but the Government has since extended the scheme to run until the end of 2024. Bus use is highest among drivers in London, where 53% take the bus at least once a month, and lowest in the south-west of England (15%).

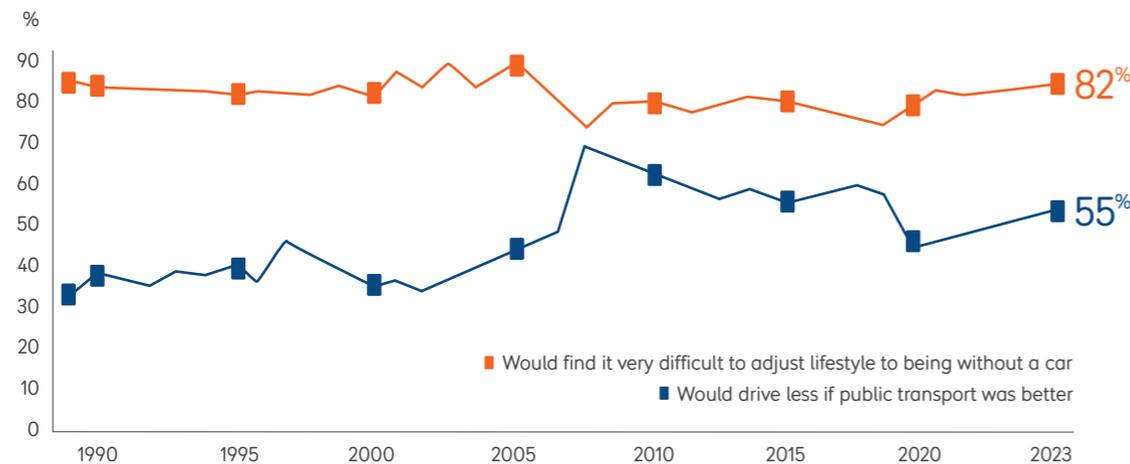
26%

The proportion of drivers who ride the bus at least once a month, up from 17% in 2022

Bus services remain under severe pressure across the country as a result of increasing financial pressures on operators. According to the Campaign for Better Transport, almost a quarter of bus services in England have been cut since the launch in 2021 of the Government's 'Bus Back Better' strategy, which was introduced to address problems facing the national bus network².

Drivers' views of using their vehicles less

In 2023, a significantly larger proportion of drivers say they would drive less if public transport was better – more than half for the first time in four years.



1. <https://www.gov.uk/guidance/2-bus-fare-cap>

2. <https://bettertransport.org.uk/blog/the-government-is-failing-bus-passengers/>



Expert view

Claire Haigh, founder and CEO, Greener Vision

"Greater use of public transport will be key to achieving the net-zero targets for transport. The Climate Change Committee recommends a 17% reduction in demand for surface transport by 2050. This means some journeys will need to switch from car to public transport, walking or cycling."

There has been no similar spike in train use over the past 12 months: this year, only 17% of drivers say they take the train at least once a month, similar to the 16% recorded in both 2022 and 2021. However, the number of drivers who say they never use the rail network has fallen to 35% from 37% last year and 42% in the run-up to the pandemic. The Government has also recently taken action to limit rises in rail fares in 2023: under normal circumstances, the previous July's inflation figure, as measured

by the retail prices index (RPI), is used to set the following year's maximum regulated rail fare rise. But while the July 2022 RPI figure was 12.3%, ministers decided to use that month's increase in earnings – which was 5.9% – as the ceiling for the price increases that took effect in March 2023³.

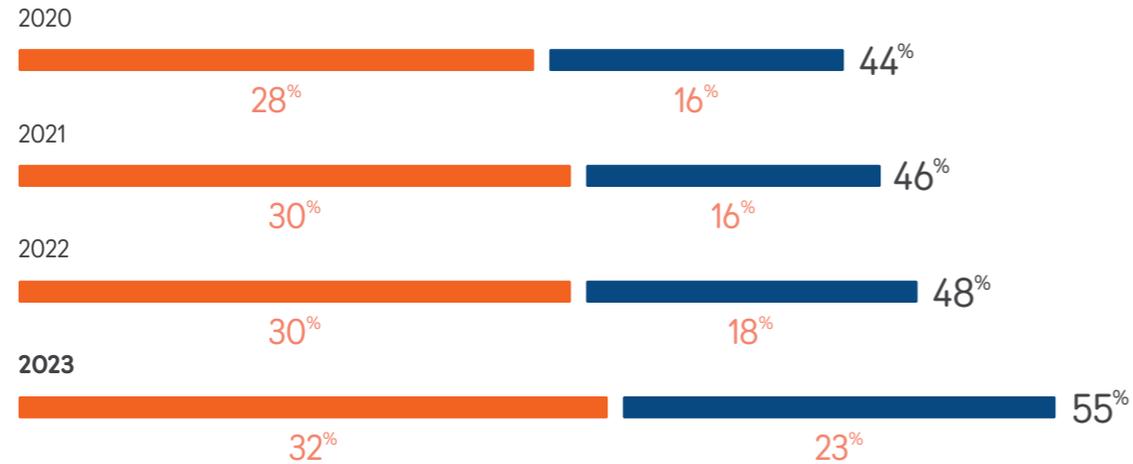
82%

The proportion of drivers who say it would be very difficult to adjust to living without a car

3. <https://www.gov.uk/government/news/biggest-government-intervention-ever-to-keep-rail-fares-down>

A growing proportion of drivers say they'd drive less if public transport was better

■ Slightly agree ■ Strongly agree



Meanwhile, it is possible that the ongoing programme of industrial action involving rail worker unions in recent months has affected some drivers' willingness or ability to use trains in preference to their own cars. This could at least partly explain the Report on Motoring's finding (see above) that post-pandemic train use among drivers has not increased in line with bus use.

There has been very little change in bicycle use in the past 12 months: the 2023 report shows that around a quarter (23%) of drivers are also cyclists, with 12% using their bikes at least once a month – the same percentage as in 2022. Figures published recently by the DfT show that cycle usage on main roads in England has fallen back from its mid-pandemic peak⁴. However, the number of cycling journeys in 2022 remained well above the levels recorded in the 12 months leading up to the UK's first pandemic lockdown in March 2020.

55%

The proportion of drivers who say they'd drive less if public transport was better, up from 48% last year

4. <https://www.gov.uk/government/statistics/cycling-index-england>



6.2 Congestion

Congestion is an increasing annoyance, in particular for those who drive in the UK's towns and cities: 62% of drivers say they have spent longer in congested traffic on urban roads than 12 months ago, compared to 49% who say the same of rural roads and 46% who say congestion on motorways and other high-speed roads has worsened.

62%

The proportion of drivers who have spent longer on congested urban roads this year than last

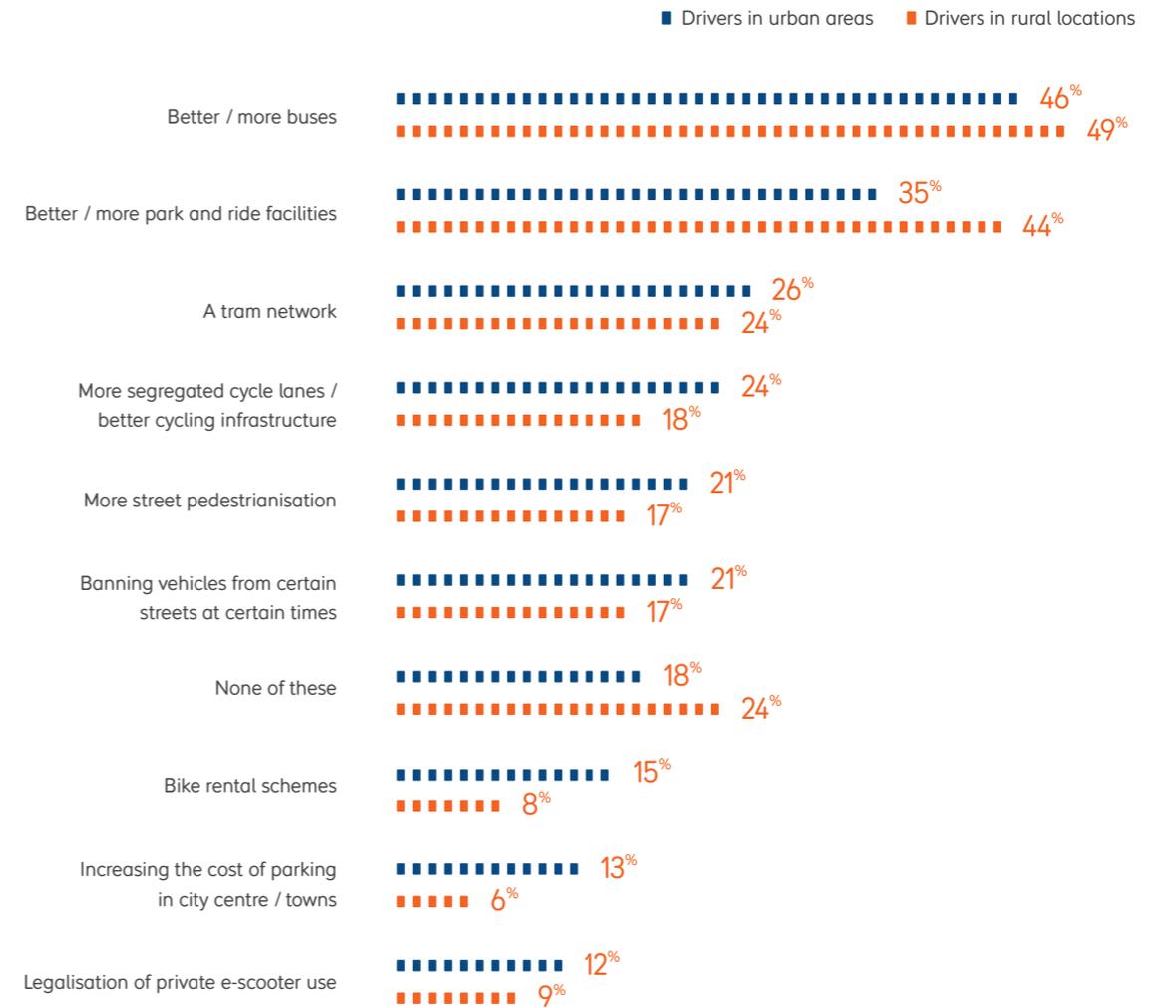
The 2023 report asked drivers for their views on the likely effectiveness of policies designed to reduce town and city-centre traffic levels. Half (50%) say they would like to see better and more frequent bus services (up from 49% in 2022), while 43% support better or more widespread park-and-ride services (down from 52% a year ago).

There have, however, been falls in support for measures such as tram networks (25%, down from 32%), better cycling infrastructure (21% from 24%) and banning vehicles from some areas at certain times (19% from 26%). Only 9% of drivers think increasing the cost of parking would lead to a fall in traffic volumes.



Measures drivers think would be effective in reducing car use in their nearest large town or city centre

Drivers believe the keys to cutting car numbers are improved bus services and park-and-ride provision.



6.3 Non-drivers

This year, for the first time, the report also surveyed 485 people who do not hold full driving licences, of whom the vast majority (87%) have never had a full licence. Looking at those individuals who used to hold a full licence, the most common reason for giving it up – cited by 37% – is some form of medical condition which means they can no longer drive. This rate rises to 44% among those aged 65 and older. A further 16% of drivers of all ages say their licence expired and they chose not to renew, 8% say they lost their confidence at the wheel and another 8% feel they are now too old to drive safely.

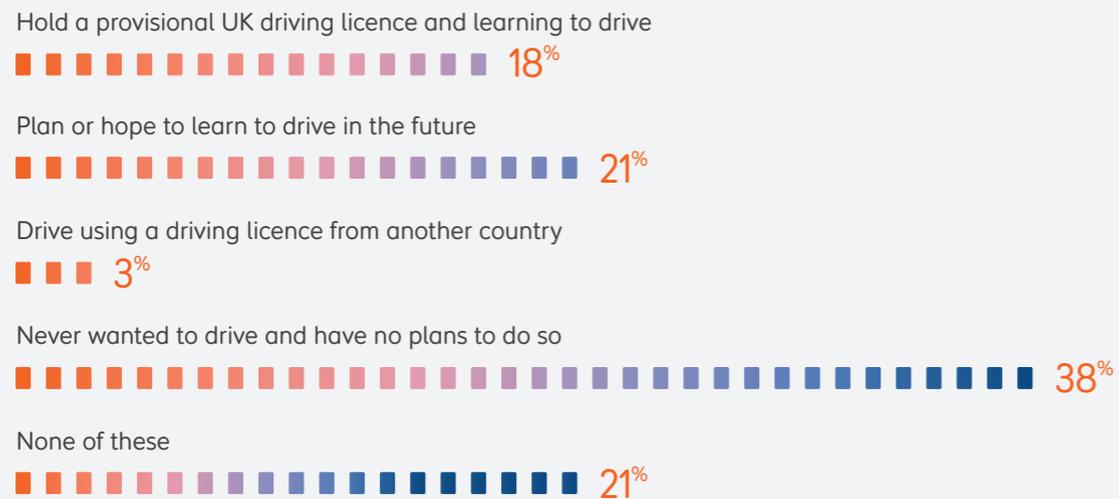
38% The proportion of non-driving licence holders who have no plans to learn to drive

Of those who have never held a full driving licence, 38% have never wanted to drive and have no plans to do so. But a similar proportion (39%) either currently hold a provisional licence and are learning to drive, or hope to learn at some point in the future. This figure rises to 80% among the under-25s, with only 6% of this age group having no plans to learn.

Of the 38% of people who do not want to drive, half (49%) say they are unwilling to take on the responsibility or expense of driving, while 45% do not think they would be a good driver. Over four-in-ten (43%) say they prefer to walk, cycle or use public transport, while 28% say they have never needed to drive.

The main reason given for learning to drive, or wanting to learn, is the freedom that driving will offer (71%). Meanwhile, 34% say they do not want to be limited in terms of where they can work in future and 29% are worried they could miss out on a job that requires them to have a full driving licence (the corresponding figures for the under-25s are 51% and 36% respectively). Finally, more than half of learners (52%) expect to use their cars at least four times a week when they get their licence – underlining once again the crucial role the car plays in modern-day Britain.

Status of people currently without full UK driving licences



Our work for drivers

2022 – 2023

Fuel duty cut extended

In our submission to the Treasury ahead of the Spring Budget, we called on the Government to extend the 5p fuel duty cut for another 12 months to help drivers with the high cost of motoring. When the Chancellor presented his Budget to Parliament he confirmed duty would stay at 52.95p per litre until April 2024.

Competition and Markets Authority's inquiry into fuel pricing

RAC Fuel Watch has played a leading role in monitoring UK fuel prices and calling out larger retailers when falling wholesale costs are not passed on sufficiently at the pumps. Our data helped initiate a market review by the Competition and Markets Authority whose final report confirmed overcharging at forecourts. The Government has since committed to implementing a requirement for retailers to submit prices to an open data source and setting up a fuel price monitoring body.

Roll-out of new 'all lane running' smart motorways scrapped

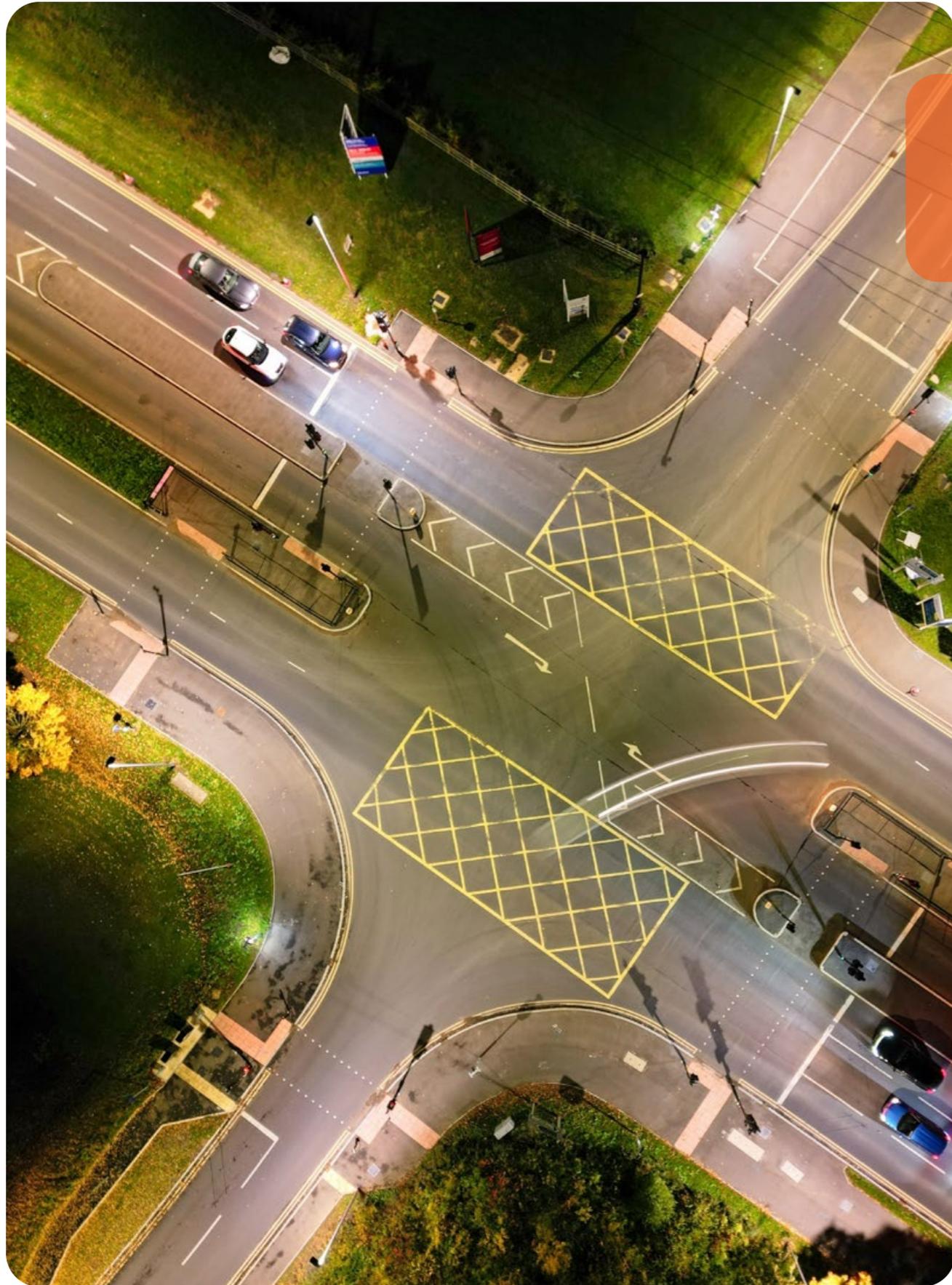
Following years of raising concerns about the safety of 'all lane running' smart motorways, we welcomed the Government's decision to scrap all new motorways of this type. We look forward to working with the Government on how best to proceed with increasing motorway capacity safely.

Additional funding for repairing local roads and new rules for utility companies that fix streets

We have consistently called for more funding to repair local roads from the pothole plague afflicting them, so we welcomed the modest £200m additional funds the Chancellor announced in Spring 2023, noting however that this was a drop in the ocean compared to what is really needed. New regulations that ensure utility companies reinstate roads they have worked on to a high standard is also a positive step.

RAC data helped initiate a market review of UK fuel prices





'Many councils are planning to enforce box junctions'

Expansion of the ULEZ scrappage scheme in London

RAC research showed how many more drivers would be impacted by the ultra-low emission zone (ULEZ) when it expands in August 2023. This helped raise the prominence of the issue and, in June 2023, the Mayor of London agreed to expand his scrappage scheme for older, more polluting vehicles, benefitting more households and small businesses.

Monitoring and pausing the enforcement of yellow box junctions

While we are not opposed to the enforcement of yellow box junction offences, our research this year showed that many councils are planning to enforce junctions that do not conform to Department for Transport guidance. We have raised our concerns with national government and succeeded in pausing the enforcement of some junctions pending council reviews.

New pilot scheme to create local charging infrastructure and charging hubs

We have consistently highlighted the issue of access to charging for those without driveways, so we welcomed the Government's commitment of £20m in August 2022 to create new EV charging infrastructure for residents, including faster on-street charge points and larger petrol station-style charging hubs through the Local EV Infrastructure (LEVI) pilot scheme.

Making taxation fairer for electric car drivers without driveways

Working with campaign group FairCharge, we have continually raised concern about the fact that drivers who have to use public chargers pay a higher 20% VAT rate than those who can charge at home, who pay just 5%. Many MPs and indeed charging networks are now calling for the Government to equalise this rate.

Closing the legal loophole on handheld mobile phone use

The RAC has long campaigned to reduce the scourge of illegal phone use at the wheel, but the law previously only applied to so-called 'interactive communication' such as making a call or texting, as it was written before mobile phones could be used for other tasks. This meant people taking videos for non-interactive purposes were able to use a loophole to avoid justice. We are pleased the law has been updated to address this issue as we believe it will help improve road safety.

Our message for government

Cost of living

Retain 5p a litre duty cut until at least end of 2024

The Government has supported drivers by extending the 5p a litre duty cut introduced shortly after Russia invaded Ukraine until April 2024, but we call on it and all political parties to pledge to keep fuel duty at the current 52.95p rate until at the least the end of 2024 to help motorists manage the high cost of driving.

Reduce insurance costs for younger drivers

Drivers report increasing insurance costs and younger drivers already pay significantly higher premiums. We call on the Government to reduce the rate of insurance premium tax (IPT) on telematics-based products to encourage take-up among younger drivers to reduce cost and improve overall road safety in a driving group that is overrepresented in fatal collisions.

Road conditions

Condition and maintenance of local roads

The condition and maintenance of local roads has returned to being the biggest concern for drivers in 2023. The RAC calls on the UK Government to urgently set out a long-term funding strategy for local roads to improve and guarantee their condition into the future – this could be by ringfencing funds from existing fuel duty contributions. If 2p per litre were to be ringfenced, this would secure £4.7bn additional funding over a five-year period, in effect doubling the amount given to councils for local roads every year. This would go some way to addressing the backlog in road maintenance in England and Wales which the Asphalt Industry Alliance now estimates to be £14bn.

Approach to maintaining roads

The Report shows widespread dissatisfaction with the quality of repairs carried out by councils and utility companies, so we urge the Government to expand funding to authorities so they can invest in new technology and machinery which provides quicker repair times with far better results. We also urge highways authorities to make greater use of surface dressing and other cost-effective techniques which are known to extend the lives of roads by preventing water ingress which then leads to potholes appearing due to freezing and cracking.



Road safety & enforcement

MOTs and vehicle safety standards

The Government should drop its idea of increasing the time between MOTs from 12 months to every two years as it could lead to many more unroadworthy vehicles on Britain's roads. RAC research shows that drivers are resolutely against the idea.

Alongside this, the EU introduced a mandate for all new vehicles to be fitted with advanced safety systems including intelligent speed assist and autonomous emergency braking. While the UK Government has so far not indicated whether it will follow suit, we strongly urge it to do so. Both measures will improve vehicle safety standards and road safety.

Casualty reduction targets

With the latest official figures showing a rise in the numbers of fatalities on the roads following a reduction during the coronavirus lockdowns, we urge the Government to look at reintroducing casualty reduction targets, thereby giving the whole topic of road safety much more national focus.

Box junction enforcement

We are concerned by changes to legislation which allow local authorities to enforce box junctions, as research shows many of these boxes do not conform to existing standards. The Government should pause enforcement and review its guidance for councils to ensure drivers are not unfairly issued penalty charge notices.

A new approach to urban 20mph limits

While speed compliance on motorways shows improvement, compliance on 20mph stretches remains poor. Rather than implementing 20mph zones across entire urban areas, local authorities should take a more holistic approach to urban road safety which combines targeted lower limits, enforcement and road layouts that improve compliance with lower speeds and encourage active travel.

The road to net zero

VAT on public chargers

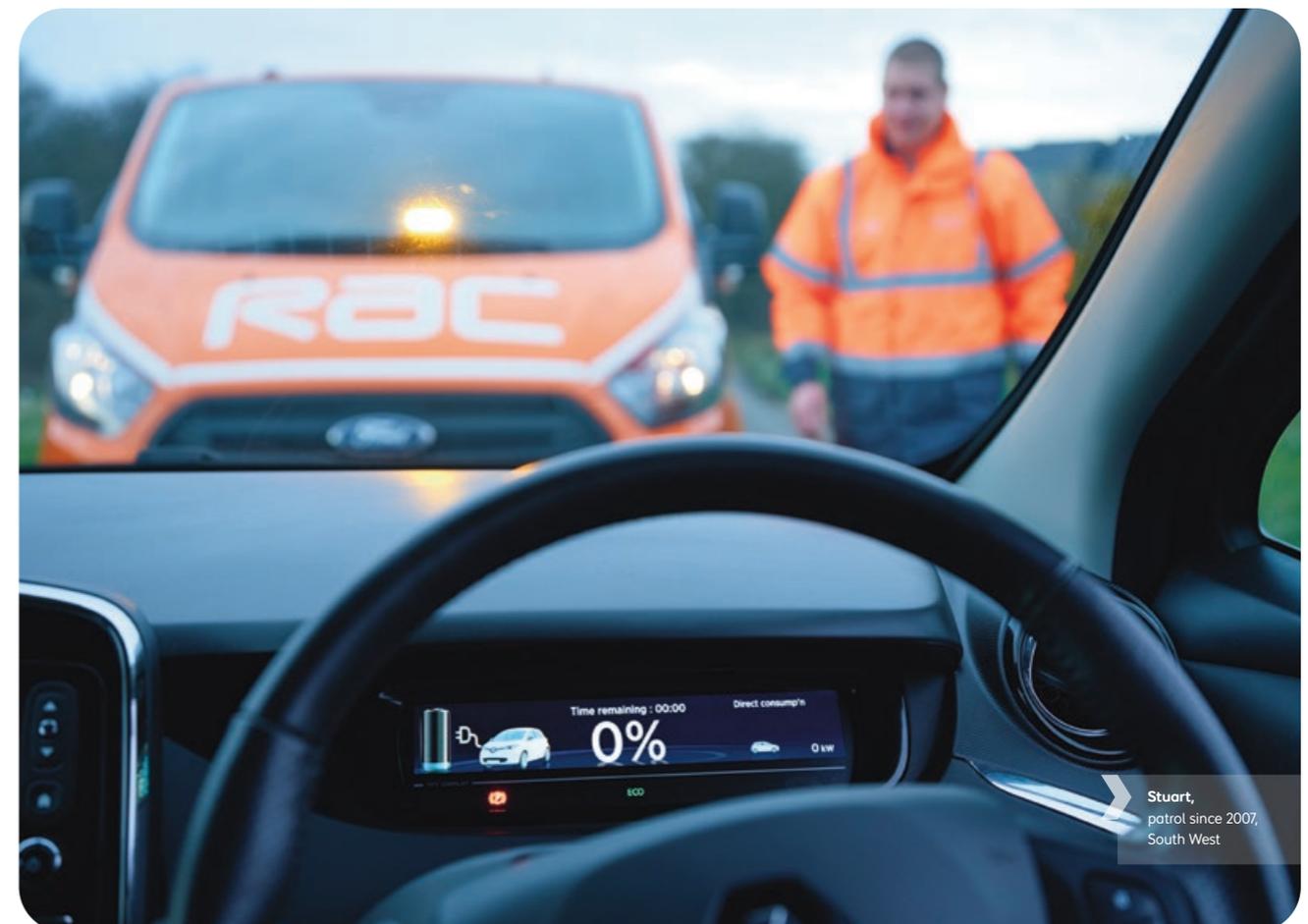
In fairness to those who cannot, and will not be able to, charge an electric vehicle at home, the Government should reduce the VAT rate at public chargers from 20% to bring it in line with the 5% levied on domestic electricity. Such a move would make charging in public more affordable and speed up adoption of EVs, particularly among those who will not be able to benefit from cheaper charging at home.

Annual charger installation targets for operators and local authorities

The Report shows 'charging anxiety' has emerged as a clear reason why drivers are not currently considering switching from conventional to electric cars. To run alongside the zero-emission vehicle mandate, which sets out annual EV sales targets for manufacturers, the RAC believes the Government should introduce an annual charger installation mandate for operators and local authorities, so infrastructure keeps pace with the increasing number of battery-electric vehicles on our roads.

Charger reliability guarantee

All rapid chargers over 50kW per hour will need to meet 99% minimum reliability standards by the end of 2023, however we urge the Government to commit to taking action against operators that do not meet this standard. We also call on the Government to expand the reliability guarantee to all public chargers of all speeds by the end of 2025.



Stuart,
patrol since 2007,
South West



Traffic and travel

A new strategy for motorways in England

The Government has scrapped plans for new all lane running smart (ALR) motorways, however this leaves hundreds of miles of existing ALR motorways without a hard shoulder. We believe the Government should urgently look at retrofitting hard shoulders to existing all-lane running schemes and bring forward new plans on how to increase capacity on the motorway network.

Retain the current bus fare cap

Data from this Report suggests there may be a link between lower bus fares – that are now widespread because of the current bus fare cap – and drivers' willingness to use their vehicles less. To sustain this behaviour, we encourage the Government to extend the bus fare cap for a further 12 months and look at long-term options for boosting use of local buses to reduce traffic.

Review safety of e-scooter trials

Before committing to any plans to legalise privately-owned e-scooters, we urge the Government to carefully consider safety data from all the e-scooter rental trials running across the country.

Rollout National Parking Platform

With drivers concerned about rising driving costs, we urge the Government to roll out its National Parking Platform at the earliest opportunity to increase choice of how drivers pay for parking. Alongside this, councils should be required to offer one other form of payment, such as cash or card, to support those without smartphones or where the mobile phone signal is poor.

Implement the Private Parking Code of Practice in early 2024

Following delays to the implementation of the new parking code because of a judicial review brought about by parking operators, we implore the Government to get it back on track with a commitment to have it live by early 2024, supported by a single appeals system, a cap on parking charge notices and a ban on expensive debt recovery fees.

Drivers and their vehicles at a glance

Below is a summary of survey respondents' vehicles and usage against figures for the 2023 Report on Motoring:

Approximate number of miles driven over 12 months¹

Miles driven	%
5,000 miles or fewer	31
5,001-10,000 miles	48
10,001 miles or more	19

Number of cars per household

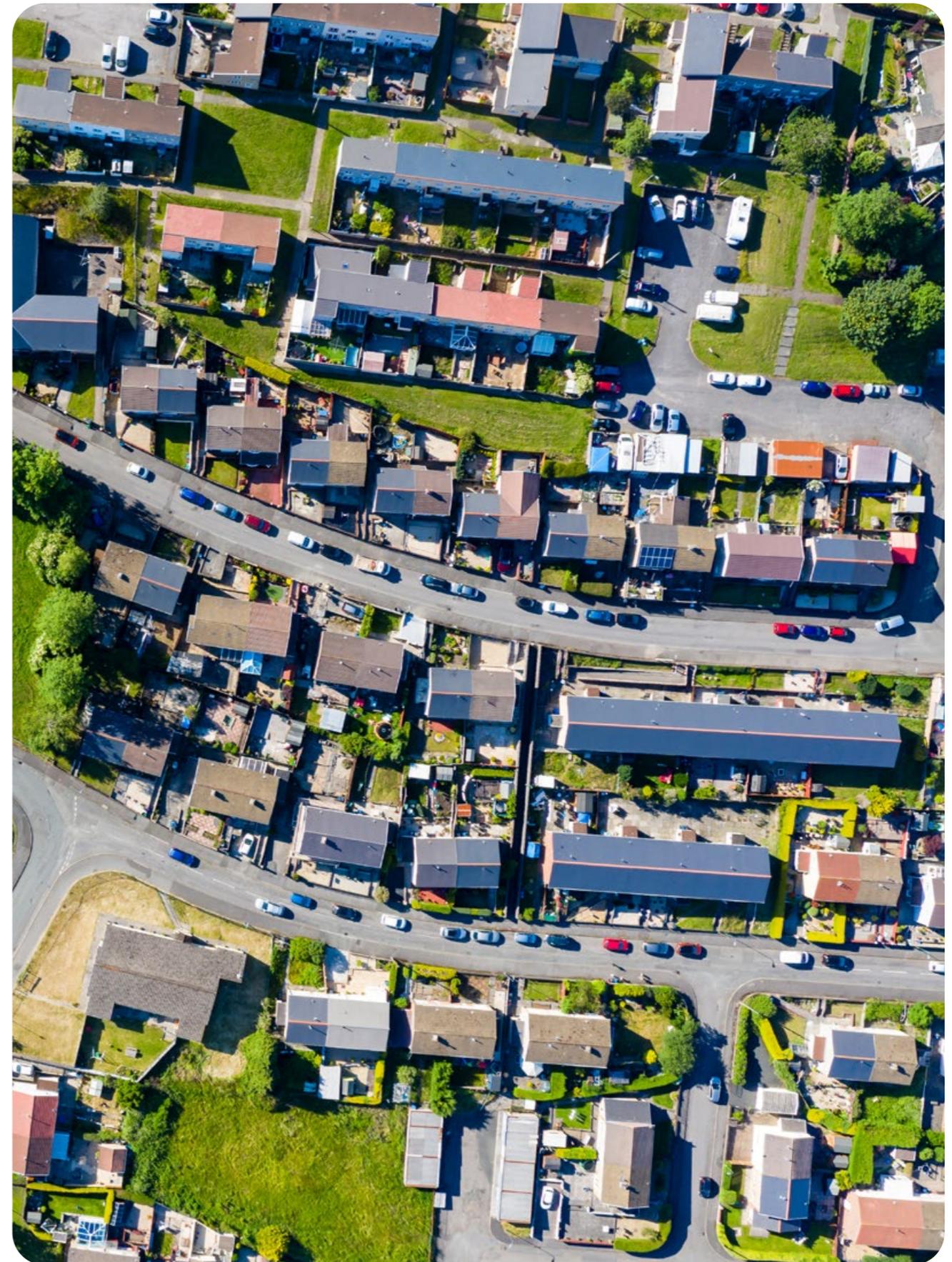
Households with	%
One car	49
Two cars	33
Three cars	10
Four cars	4
Five or more cars	3

Age of vehicles²

Motorists who own a car	%
Less than a year old	5
1-2 years old	9
2-3 years old	9
3-4 years old	14
Between 5 and 10 years old	35
More than 10 years old	30

Average number of cars	
In household	1.8

1. All who personally drive a vehicle at least once a month (QS11H)
 2. Age of vehicle driven most often



Research methodology

The RAC Report on Motoring 2023 is based on a large-scale online survey carried out by Online95 on behalf of the RAC. In total, Online95 interviewed 2,937 UK motorists (i.e. those who hold a full, current UK driving licence, drive at least once a month and have a motor vehicle in their household). The survey was conducted from 17 February to 13 March 2023, with the questionnaire taking around 30 minutes to complete. Responses were rim weighted to be nationally representative of UK motorists in age, gender, socio-economic groups and all UK regions. The data in the Report was analysed and reported by Ragdoll Research & Planning.

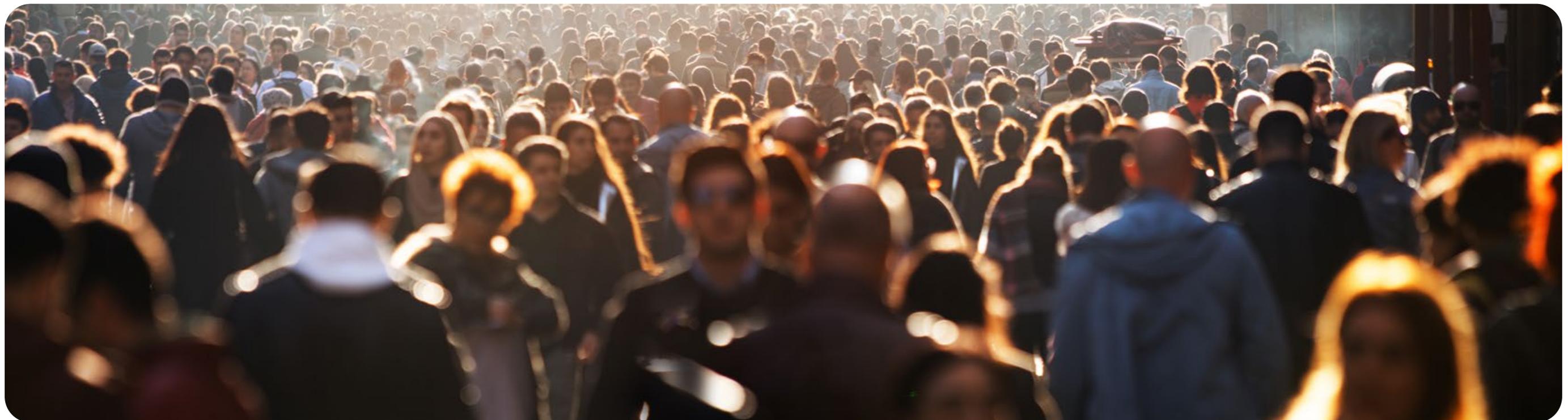
Statistical reliability

Any figures taken from a sample of a population should not be taken as a precise indication of the actual figures for that population. The reported figures are estimates, within a small margin of error, of the actual figures. The margin of error varies with sample size – the larger the sample is, the lower the error will be. It also varies with the proportions answering: the margin of error is smaller for a 90% or 10% result than for a 50% result. In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with an example sample size of 1,000, and the effective sample size of the weighted survey data, 2,100.

Sample size	Reported percentage at 95% level of confidence				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000	±1.86%	±2.48%	±2.84%	±3.04%	±3.10%
2,100	±1.28%	±1.71%	±1.96%	±2.10%	±2.14%

How to read the above table: Assume the reported percentage, with an effective sample base of 2,100, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.71%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with an effective sample size of 2,100 will produce a percentage of 23%, plus or minus 1.71%, or within the range of 21.29% and 24.71%.

Please note that the margin of error will be marginally different for each reported percentage, however, the above table can serve to find the closest estimate.



Company overview

The RAC provides complete peace of mind to more than 13m UK personal and business members. Whatever the need, we have a growing range of driving and mobility-related services and solutions covering everything from breakdown assistance to vehicle insurance, and from car maintenance to servicing and repairs – all increasingly enabled by digital platforms, data and our colleagues.

Headquartered in the West Midlands with around 4,000 staff, the RAC operates from three bases – Walsall, Bristol and Salford – with its vehicle and breakdown services underpinned by its nationwide, branded patrol force. Last year, RAC patrols attended 2.4m breakdowns.

We provide individual members and small business owners with breakdown cover and a broad range of exclusive optional extras on either an annual or flexible monthly subscription basis. Through our partnerships with leading motor manufacturers, banks, insurance companies and fleets, we also provide breakdown and accident assistance to individuals, and technical and customer support services. In insurance, we offer primarily motor and telematics insurance policies, many of which are available through price comparison websites.

For the one-in-five vehicles our patrols are not able to fix, the RAC has a growing nationwide network of mobile mechanics capable of repairing vehicles, as well as completing routine servicing, on customers' drives or at their workplaces for ultimate convenience. We also have a network of more than 700 approved garages delivering the highest standards of service for our members under the trusted RAC name.

We also continue to work to accelerate the switch to electric vehicles (EVs), providing drivers with a choice of home charger installation deals. Alongside this, we're investing and innovating to ensure we are best equipped to look after the cars of today and tomorrow. Our fleet of breakdown vans has been upgraded to cater for the needs of EVs: we can now give emergency charges to depleted EVs and, if needs be, tow them with all four wheels off the road without the need for a separate flatbed recovery vehicle. In addition, the RAC was the first national roadside assistance company to put zero-emission electric patrol vans into service.

The RAC also offers drivers an online shop, a used car buying website, legal services, vehicle history checks and inspections, and a nationwide network of used car sales dealerships.

Using our research with drivers, the RAC campaigns at a national level on the biggest motoring issues, including the condition and maintenance of the country's roads, the cost of filling and charging up, and road safety.

'A growing nationwide network of RAC Mobile Mechanics'

Contact

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Mitchell, patrol since 2018, South West

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This report was guided by the expert contributions of the RAC Report on Motoring advisory panel.

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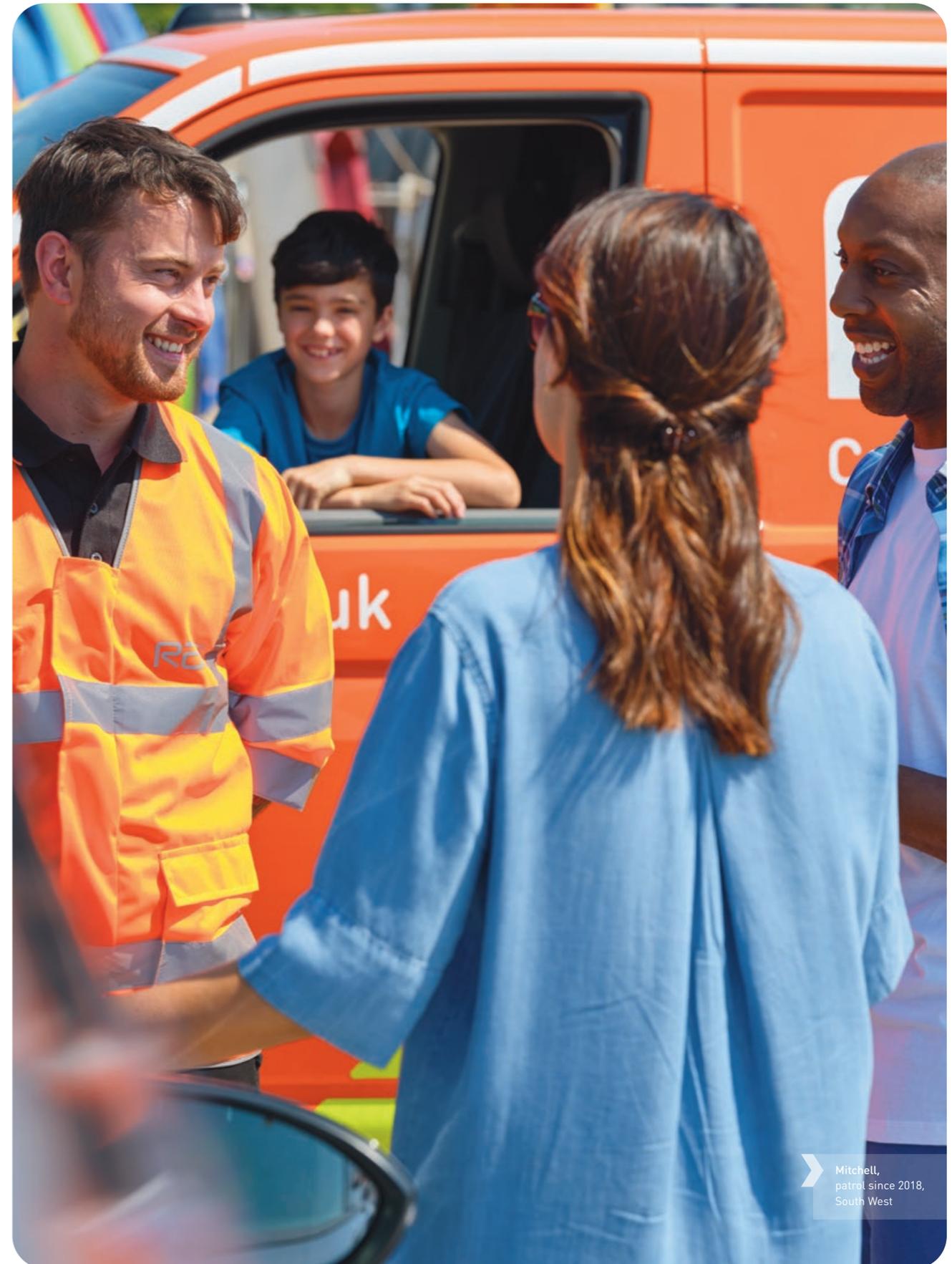
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The RAC's news releases and a selection of images are available online at: media.rac.co.uk

This report, as well as those from previous years, are available online at: rac.co.uk/report-on-motoring

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