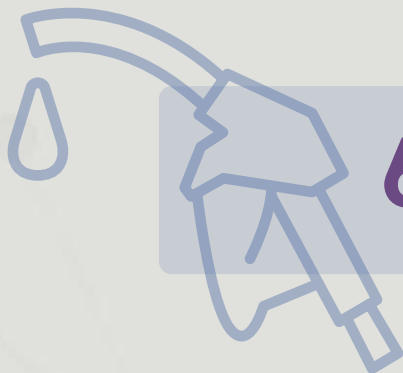


# Keeping motorists mobile

RAC Report on Motoring 2022



RAC



62%

### The rising price of fuel

In both the 17-24 and the 25-44 age groups, 62% say the cost of filling up is a top concern compared to 47% of those aged 65 and older.

81%

of drivers say they would struggle to get by without a car

28%

of drivers own a car over 10 years old



With this year's research showing a greater propensity for drivers to use apps and websites to manage their motoring lives, we are making sure all our services can be easily accessed this way."

Dave Hobday, RAC Chief Executive

37%

of drivers  
under 25 have  
put off getting  
car repairs done

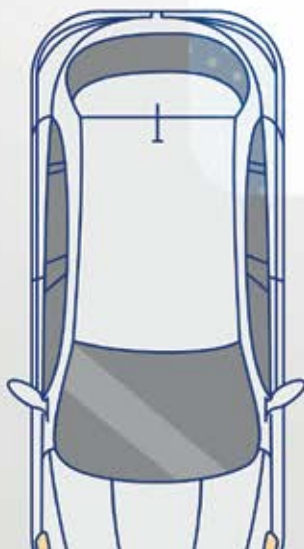


### 'We come to you' mechanics

RAC Mobile Mechanics bring the garage to customers' homes or workplaces, taking the hassle out of car servicing – all for a similar price as going to a garage.



14% of drivers  
expect their next  
vehicle to be pure  
electric, up from  
10% in 2021



### RAC Charge Watch

To help EV drivers save money when using the fastest public chargers, we have launched RAC Charge Watch to keep an eye on how prices change over time.





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## Foreword

Dave Hobday, RAC Chief Executive

As the UK emerges from the coronavirus pandemic that has dominated the last two years, 2022 has brought a new set of challenges shaped by **rising inflation** and a **cost-of-living crisis** affecting every household. This is very clearly laid bare in this year's RAC Report on Motoring, where the high cost of fuel is now the biggest overall concern for drivers.

With a tank of petrol and diesel both exceeding £100 for the first time ever, drivers are having to make difficult choices about how they use their vehicles as well as when to change them. It is also a concern that the impact of high fuel prices is causing people, particularly younger drivers, to put off getting their cars serviced and having repairs done. Regular servicing and maintenance are vital for ensuring vehicles stay in the best possible condition – something which is even more important as this year's data shows drivers are holding on to their cars for longer than ever.

In a bid to simplify servicing we are bringing the garage to drivers by launching **RAC Mobile Mechanics** who can conveniently service and repair customers' cars at their homes or workplaces. This is in addition to our network of more than **700 RAC approved garages** which repair and maintain our members' vehicles to the highest standards. With this year's research also showing a greater propensity for drivers to use apps and websites to manage their motoring lives, we are making sure all our services can be easily accessed this way.

Given the worries about the running costs of petrol and diesel vehicles, it's perhaps not surprising that interest in electric vehicles has increased again this year. This summer we saw the number of new pure electric vehicles registered exceed half a million and growth is only going to continue ahead of the Government's 2030 deadline to end the sale of new petrol and diesel cars. Alongside this, it's vital we have a network of reliable, fast and easy-to-use public charge points to ensure all drivers can fully embrace the new era of zero-tailpipe emission car use. To help EV drivers save money when using the fastest public chargers, we have launched **RAC Charge Watch** to keep an eye on how prices change over time.

We are proud that this year we became the UK's first major breakdown organisation to introduce an all-electric patrol van to our fleet, cementing our position at the forefront of technological innovation in roadside assistance. We have also increased the number of patrol vans fitted with even faster EV boost emergency charge units which are designed to get flat or severely depleted EVs going again.

This change to how our vehicles are powered will bring other challenges like how we pay for using our roads as traditional forms of taxation such as fuel duty decline in the long-term. This year's Report looks closely at options to replace fuel duty and finds drivers are split on how this should be done. The Government should engage with the sector on this and the RAC stands ready to share drivers' views on the issue and work with the Treasury to identify the most suitable new system.

Whatever new tax system we end up with we are keen a proportion of this is ring-fenced for roads as drivers remain incredibly exasperated by the poor condition of the local road network. In 2021, the **RAC recorded more than 10,000 pothole-related breakdowns** many of which would have led to costly repairs for our members. It's vital that roads authorities have the tools and the finances to get on top of the problem, so we urge the Government to make this a priority.

While times on the road are both challenging and changing, this year's Report shows that drivers continue to depend on their vehicles which is why we remain focussed on providing them with complete peace of mind for all their driving needs.

Throughout the **RAC's 125-year history** we have consistently innovated to help our members and now with more tools than ever before at our disposal – digital, technology and data – we are in a position to make every driver's life easier right from the palm of their hand. We can help them save money through cost-of-living crisis, navigate the exciting but complex world of EVs, provide simple, convenient access to servicing and repairs, report a breakdown, and much more. Watch this space.





**FuelSave**

**Unleaded** Litre

18

**FuelSave**

**Diesel** Litre

19



## 1. What's on motorists' minds in 2022?

The enormous increase in the price of petrol and diesel to new record levels in 2022 is by a considerable margin the top concern among Britain's drivers, the latest edition of the RAC Report on Motoring has found.

This year, 55% of drivers say that the cost of fuel is one of their most pressing motoring-related concerns – well over double the 25% rate recorded in 2021 and the highest level since 2013. That year, the price of unleaded petrol averaged almost 135p per litre with diesel over 140p, far lower than prices today.



It should also be noted that forecourt prices continued to increase dramatically in the weeks following the end of the Report on Motoring fieldwork in mid-May this year, so it is entirely feasible that this issue has become an even more widespread problem since then.

Fuel costs are an even greater issue for younger drivers: among those aged between 17 and 44, 62% say this is a top concern. We look at the impact of rising petrol and diesel costs, as well as other inflationary pressures on motorists, in greater depth in Chapter 2: rising cost of motoring.

The state of local roads is the second biggest concern in 2022, with 45% of drivers naming this as a top issue this year – almost unchanged on the 46% recorded in 2021. The rate rises to 55% among drivers aged 65 and older, making it this group's top concern this year. In contrast, only 27% of under-25s say the condition of the local roads in their area is a main concern. Concern about the state of the UK's motorways and dual carriageways (the strategic road network), meanwhile, has fallen to 8% this year, its lowest level since 2017.

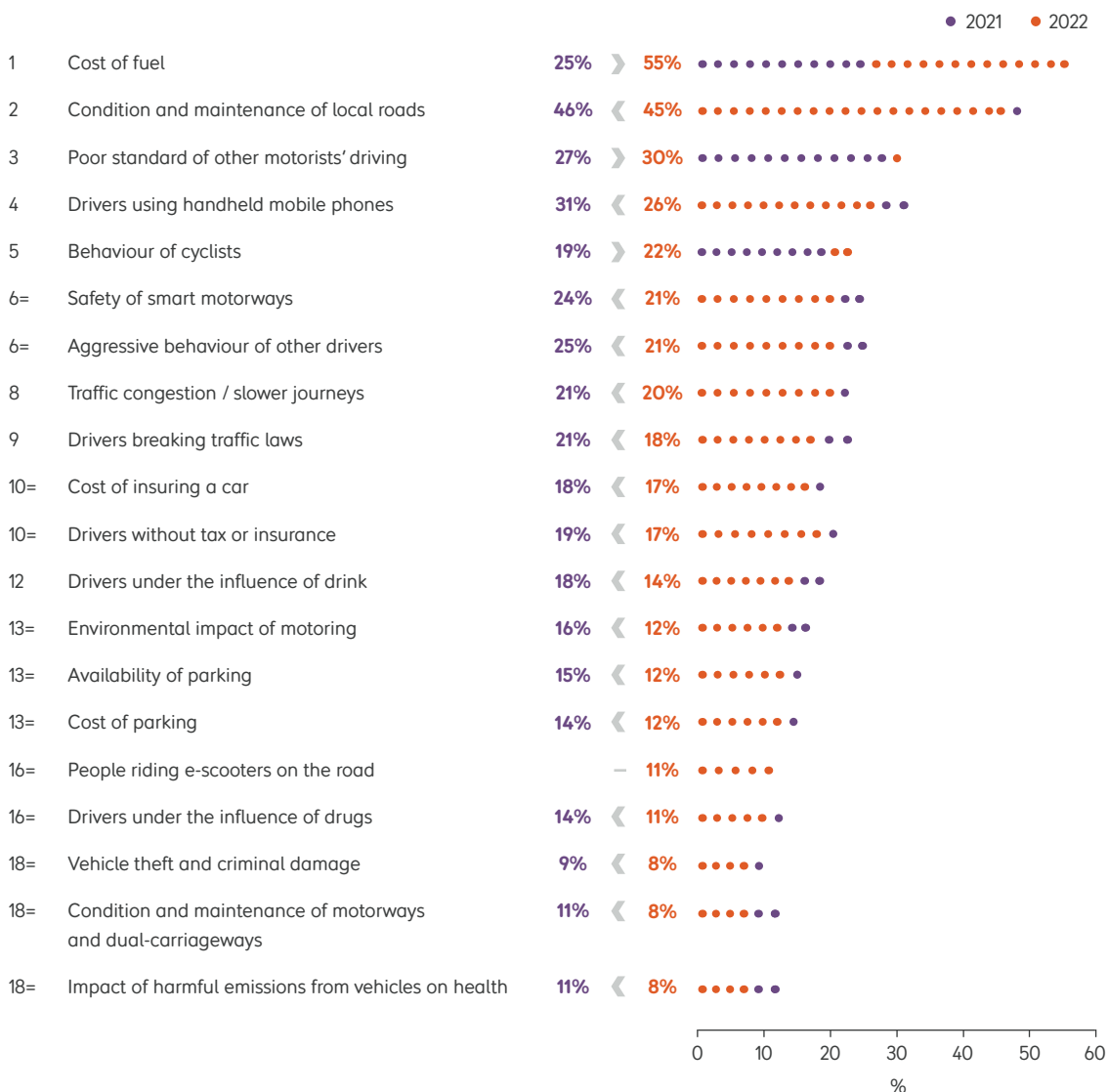
Drivers' views on the conditions of local and high-speed roads, as well as potential solutions to the perennial problem of inadequate road maintenance, are analysed in Chapter 3: The state of our roads.





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

% of drivers that said the issue was a concern to them





The dangerous, careless or illegal behaviour of other road users remains a widespread source of anxiety. One in three drivers (30%) say that the poor standard of other motorists' driving is a top concern – up from 27% a year ago – while 26% cite people using hand-held mobile phones while driving as a concern.

There has been an increase in the number of drivers who say they are concerned about the risky or reckless behaviour of cyclists on the road, from 19% in 2021 to 22% this year. And 21% say the aggressive behaviour of other drivers is a top concern. There has been a sharp decline in concern about drink-driving, however: this year this is a worry for just 14% of drivers compared to 28% as recently as 2019.

We explore the issues mentioned above in greater detail in Chapter 6: The dangers on our roads.

When it comes to other motoring topics, concern levels are generally lower than 12 months ago (although this does differ by age

group). However, this is at least partly due to the huge rise in concern about fuel prices. Given that drivers surveyed for the Report are asked to select their four main concerns, the emergence of such a major issue will inevitably shift the focus away from other problems that are perceived as relatively less important. The proportion of drivers expressing major concern about the environmental impact of motoring this year has dropped from 16% down to 12%, while only 8% of drivers say the impact on health of harmful vehicle emissions is a top concern, down from 11% a year ago. We examine sentiment around electric vehicles and possible emission-related tax changes in Chapter 5, Next car choice.

The safety of smart motorways – in particular the 'all lane running' configuration (see Chapter 6 for more details) – is a concern for 21% of drivers in 2022, while 20% say that traffic congestion and/or slower journey times is a top concern.



... **Expert view**

“While public charging remains a concern for drivers thinking of making the switch to electric, over the past 12 months the charging network has expanded by 40% both in the high-speed chargers needed for longer journeys and also locally with the roll-out of on-street charging.”

Melanie Shufflebotham, co-founder, Zap-Map









## 2. The rising cost of motoring

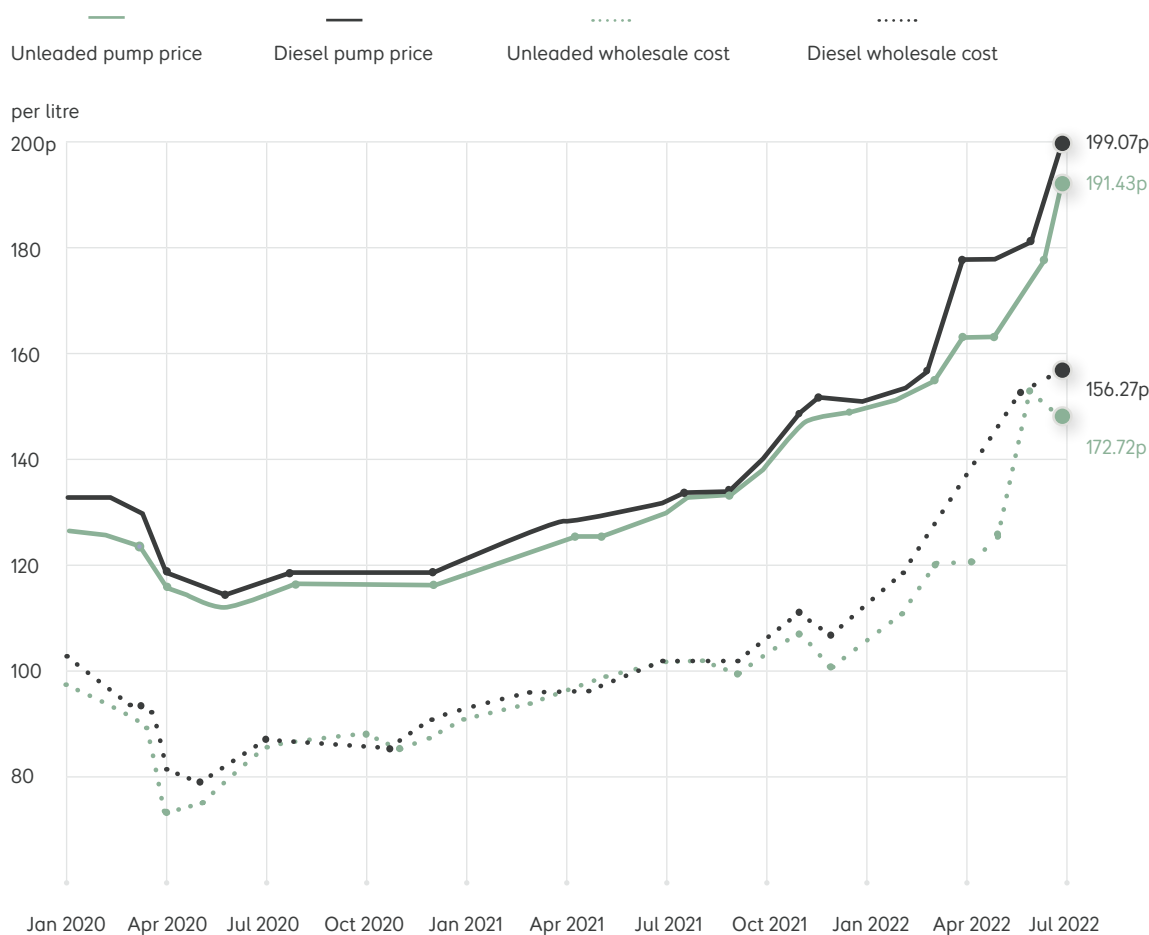
UK households are facing unprecedented financial pressures which have been created to a large extent by rocketing energy, food and fuel prices. The cost of filling up a car with petrol or diesel surpassed the record set in 2012 in October 2021 and continued to increase in the months that followed: it is far from surprising, therefore, that the price of fuel is by far and away drivers' top gripe in 2022, finally unseating potholed local roads as the biggest concern. What's more, not only is concern about fuel prices at the highest level since 2013, an overwhelming majority of drivers also say they are spending more on fuel than in 2021.

## 2.1 The rising price of fuel

The global price of oil rose steadily during 2021 and in the first half of 2022 following a slump at the start of the pandemic as major economies imposed lockdowns to slow the spread of Covid-19. However, Russia's invasion of Ukraine in February 2022 – and the sanctions that followed – caused the barrel to exceed \$100 for the first time in over seven years.

Forecourt prices in the UK have followed suit: after averaging just over 133p a litre in 2021<sup>1</sup>, the cost of unleaded hit 163p at the start of May, when the fieldwork for the 2022 Report on Motoring was being carried out. Fuel prices continued to rise into June, exceeding 190p per litre for unleaded and 199p for a litre of diesel, making the cost of filling a 55-litre family car over £105 for both fuels.

### How average fuel prices have increased since the pandemic



1. [www.rac.co.uk/drive/advice/fuel-watch](http://www.rac.co.uk/drive/advice/fuel-watch)

In March, the Government announced a 5p-a-litre cut<sup>2</sup> in the rate of fuel duty – taking duty levels down to 52.95p per litre: while this was a welcome move, it has been more than swallowed up by a subsequent dramatic rise in the wholesale cost of petrol and diesel and, in turn, pump prices.

A huge majority of drivers (92%) report a rise in expenditure on petrol or diesel in the past 12 months compared to just 27% last year. Although this is likely to be predominantly

the result of higher pump prices, it should be noted that drivers will generally have used their vehicles more – whether for commuting or leisure purposes – following the end of UK's second major lockdown at the start of 2021.

## Young drivers

are significantly more likely to rate fuel costs as a top concern compared to other age groups

2. [www.gov.uk/government/publications/spring-statement-2022-documents](https://www.gov.uk/government/publications/spring-statement-2022-documents)





The cost of fuel is a much greater issue for younger drivers: this is arguably a result of their lower incomes and their propensity to drive more miles. In both the 17-24 and the 25-44 age groups, 62% say the cost of filling up is a top concern compared to 47% of those aged 65 and older.

Petrol and diesel are not the only means of powering a car, and owners of battery electric vehicles have also seen their costs

increase as a result of rising electricity prices. In September it was reported by the RAC<sup>3</sup> that the average price of charging an electric car on a pay-as-you-go basis via a public rapid charger had risen by 42% since May 2022 to 63.29p per kilowatt hour (kWh). However, this still represents better value for money than filling a petrol or diesel-powered car, with an 80% charge at a rapid charge point costing EV (electric vehicle) owners just £32.41.



38%

have taken steps to reduce their overall motoring expenses in the face of rising fuel costs

## FairCharge<sup>®</sup>

To make sure EV drivers who can't charge their cars at home don't lose out financially, the **RAC is supporting the FairCharge campaign<sup>4</sup>** which is calling for an equalisation of the VAT imposed on electricity for battery electric vehicles at public chargers: at present, VAT is charged on public chargers at 20% while domestic electricity incurs a rate of just 5%.

**FairCharge is lobbying for the 20% rate on public chargers to be cut, bringing it in line with VAT levels on domestic electricity.**

3. [www.rac.co.uk/chargewatch](http://www.rac.co.uk/chargewatch)

4. [www.faircharge.co.uk](http://www.faircharge.co.uk)

## 2.2 Beyond fuel

### Other motoring costs

Just over half of drivers (51%) say they are paying more for motor insurance than a year ago, although concern about the cost of cover has fallen steadily in recent years: from a level of 29% in 2015 to just 17% saying the cost of insuring their vehicle is a top concern in 2022.

This may reflect some recent changes in the insurance industry: during the pandemic, for example, many providers reduced premiums for customers who were no longer using their cars as much for commuting as a result of lockdowns or a shift towards home-working.

Meanwhile, at the start of 2022 the Financial Conduct Authority introduced a ban on insurers charging existing customers higher prices for renewing policies than they would charge new customers for the same level of cover.

Only 12% of drivers say their motor insurance premiums have fallen in the past 12 months, while 35% claim they have stayed the same. This, however, runs contrary to the Association of British Insurers (ABI) reporting in May 2022 that motor insurance premiums had started to fall by 5%<sup>5</sup>. Maintenance costs, including those for servicing and MOTs as well as ad hoc repairs, have increased for 54% of drivers, almost certainly because of inflation and the rising costs of parts. A further 42% say their expenditure on servicing and MOTs has not changed in the past 12 months.

Almost half of drivers (49%) say that parking charges in general have risen since 2021 while 35% think they have stayed at last year's levels. But concern about the cost of parking is at its lowest level in recent years: only 12% of drivers name this as a top concern in 2022 compared with 20% in 2018 and 18% in 2019.

5. [www.abi.org.uk/news/news-articles/2022/05/average-cost-of-motor-insurance-has-fallen-by-5-percent-so-far-this-year](https://www.abi.org.uk/news/news-articles/2022/05/average-cost-of-motor-insurance-has-fallen-by-5-percent-so-far-this-year)





... **Expert view**

“ One reason insurance premiums are going up is that repair costs have risen exponentially – largely because of the substantial increase in parts’ prices across the board.”

Matthew Avery, chief research strategy officer, Thatcham Research and board member for Euro NCAP

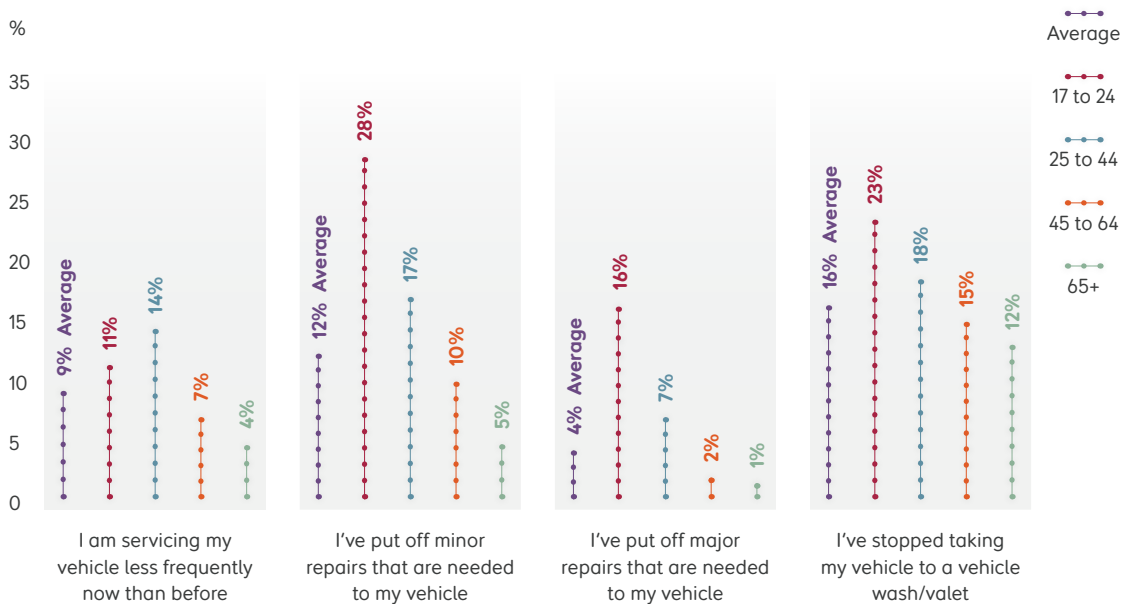


## 2.3 Money-saving strategies

### How are drivers coping with the rising cost of motoring?

As fuel costs have risen, nearly four in 10 drivers (38%) have taken steps to reduce their overall motoring expenses. The most common include no longer taking a vehicle to a car wash/valet service (16%) and switching to a cheaper insurance provider (13%).

#### What have drivers done to reduce what they spend on motoring?



But alarmingly, 12% say they have put off getting minor repairs done while 4% have deferred major ones. Younger drivers are much more likely to avoid having repair work carried out in order to save money: a huge 37% of under-25s say they have delayed making repairs as a result of cashflow issues, with 16% of drivers in this age group admitting to putting off major repairs.

This is almost certainly due to the fact younger drivers tend to have older vehicles which are more likely to need repairing while also struggling financially due to higher insurance premiums and lower incomes.

**37%** of under 25s have put off getting car repairs completed

Breakdown cover, however, remains vital as very few drivers have reduced their level of cover or switched to cheaper providers to lower their motoring costs.

This year's Report also shows a continuation of the trend towards drivers holding onto their cars for longer before switching to a newer model: in 2022, 65% of drivers say their main vehicle is at least five years old compared to 62% in 2021 and just 41% in 2018. Just 28% of drivers in 2022 say they expect to trade up to a newer vehicle within the next two years compared with 36% in 2019.

Among drivers who are not planning to change their vehicles in the near future, the majority (77%) say this is simply because they are happy with their current car. But 14% blame rising

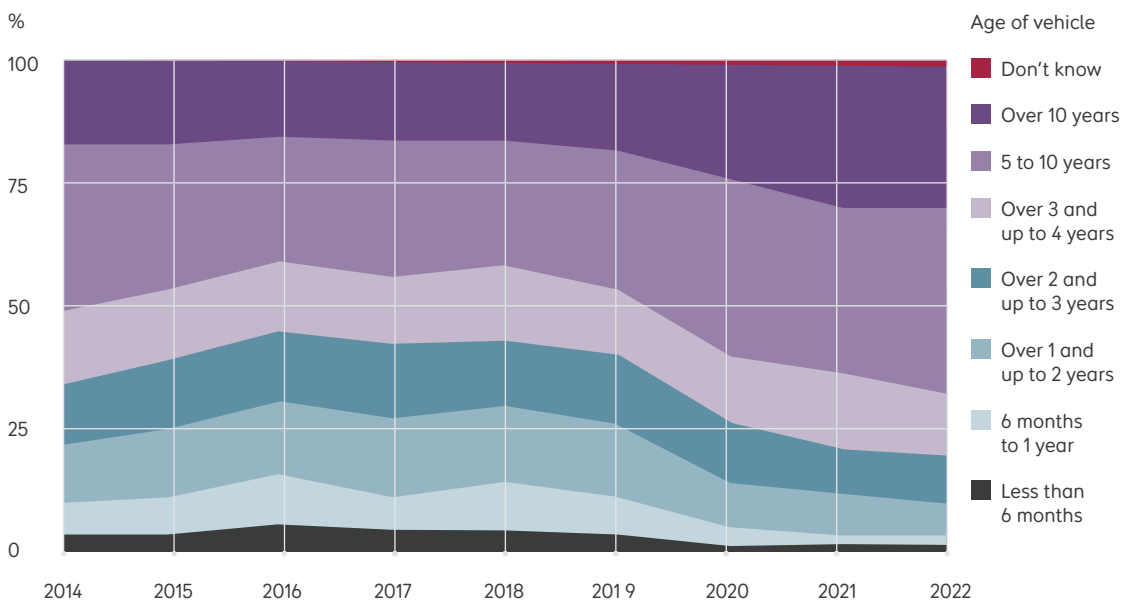
costs elsewhere – for example higher energy and fuel prices – and 8% point to high second-hand vehicle prices. Drivers aged 64 and older are most likely to say they are happy with their current car (83%) and least likely to say rising costs are preventing them from changing their vehicle (10%). Those aged between 25 and 44 are more likely than other age groups to say they are not planning to buy a new car because of high second-hand prices (14%).

14%

of those not planning on changing their vehicles say it's because of rising costs elsewhere

## Drivers are holding onto their vehicles for longer

In 2022, almost two-thirds of vehicles are at least five years old, while in 2018 just four-in-10 were this old.





podPOINT

podPOINT



# Convenient and affordable servicing

With the cost of fuel clearly the number-one concern on drivers' minds in this year's report, the squeeze on household budgets is unfortunately also having an unwanted knock-on effect on the health of vehicles with some choosing to postpone repairs and routine maintenance.

While one-in-10 (12%) admit to putting off getting minor repairs done, younger drivers are much more likely to avoid having repair work carried out in order to save money with more than a third (37%) of those 24 and under saying they have delayed making repairs as a result of cashflow issues.

This could very easily prove to be a short-term saving that ends up costing drivers of all ages dear in the longer term, as a well-maintained car is far less likely to break down and require expensive garage repairs. Fortunately, the RAC can help.

## RAC Service Plans

The RAC is focussed on making servicing both simple and affordable. For those who don't want to have to find the money for a service in one go we have created service plans which enable drivers to pay a small monthly fee to cover servicing and MOTs at an RAC Approved Garage whenever it's needed.

## Approved garages

The RAC Approved Garage Network is made up of more than 700 independent garages which have been given the RAC's seal of approval for the high quality of work they carry out. As well as offering general servicing, repairs and MOT work, they also fix vehicles that RAC patrols have not been able to at the roadside.



## Drivers' increasing use of websites and mobile apps

In line with the RAC's ongoing goal of maximising all its mobility and driving services and solutions through the use of digital, data and technology, any type of service can be arranged easily online via the RAC website, with bookings managed by the online car repair platform WhoCanFixMyCar.com.

Interestingly, research for this year's Report on Motoring has also revealed a growing trend among drivers to use the internet and digital apps to run their driving lives.

Journey planning tools, such as the RAC's very popular Routeplanner on [rac.co.uk](http://rac.co.uk), understandably tend to be the most commonly used (72%), ahead of comparison sites to buy motor insurance (56%) and new or used car buying sites (49%), but drivers are also increasingly turning to mobile apps and websites to find the cheapest fuel (28%) and to book an MOT test or service (25%).

Going forwards, however, drivers' use of apps and the internet looks set to become even greater with the biggest increase being seen in willingness to report breakdowns (38% compared to 10% currently) and booking services and MOTs (46% compared to 25% currently).

Finding the cheapest petrol or diesel showed the next biggest growth (45% future use vs. 28% currently) followed by those saying they would go online to search for a mechanic to repair a fault on their vehicle (28% future use vs. 12% currently).



## **Mobile Mechanics**

We bring the garage to you

### 'We come to you' mechanics

For many people, going to a garage can be both time-consuming and inconvenient, so this year we have launched our first RAC Mobile Mechanics who bring the garage to customers' homes or workplaces.

While we are renowned for our orange vans and highly skilled patrols, we decided to extend our trusted roadside assistance reputation to mobile servicing to take the hassle out of car servicing – all for a similar price as going to a garage.

An RAC Mobile Mechanics interim includes 25 vehicle safety checks, an oil change, topping up of coolant, brake fluid, power steering fluid and windscreen washer reservoir if required, resetting the service light and providing proof of servicing.

A full service includes all of above, along with air filter replacement, changing spark plugs if required and 15 more safety checks taking the total to 40. These include checking the fuel system and tank, the condition and tension of auxiliary drive belts (not timing belt), and the condition of brake fluid.

For those who don't require a full or interim service a standalone oil change can be carried out by an RAC mobile mechanic.

**Find out more at**  
**[www.rac.co.uk/car-care/mobile-mechanic](http://www.rac.co.uk/car-care/mobile-mechanic)**







### 3. The state of our roads

The poor condition of the UK's roads, in particular local roads, has become an increasingly widespread problem for drivers over recent years, the RAC Report on Motoring has found. Concern about the state of local roads was just 30% in 2015, but this rose to become the nation's top motoring concern – peaking at 46% in 2021 – before dipping slightly to 45% this year. Concern is most pronounced among the over-65s.

## 3.1 Local road conditions

Given the sharp rise in concern about fuel prices this year, the fact that local road maintenance remains such a prominent issue is a reflection of how deep-seated this problem has become.

This assertion is supported by figures which show that only 4% of drivers think the state of the local roads in their area has improved in

**4%** think the state of roads in their local areas has improved in the last 12 months

the past 12 months, down from 6% a year ago. Meanwhile, 60% say conditions are worse, up from 58% in 2021.

Issues with road surface quality are the main reason drivers say conditions have deteriorated (98%). But potholes and the like are no longer the only problem: 63% say they have noticed faded road markings, up from 56% last year, while 42% report worsened signage visibility and 35% complain about the amount of litter by the roadside. Lack of grass and foliage maintenance is another problem, cited by 30% of drivers.

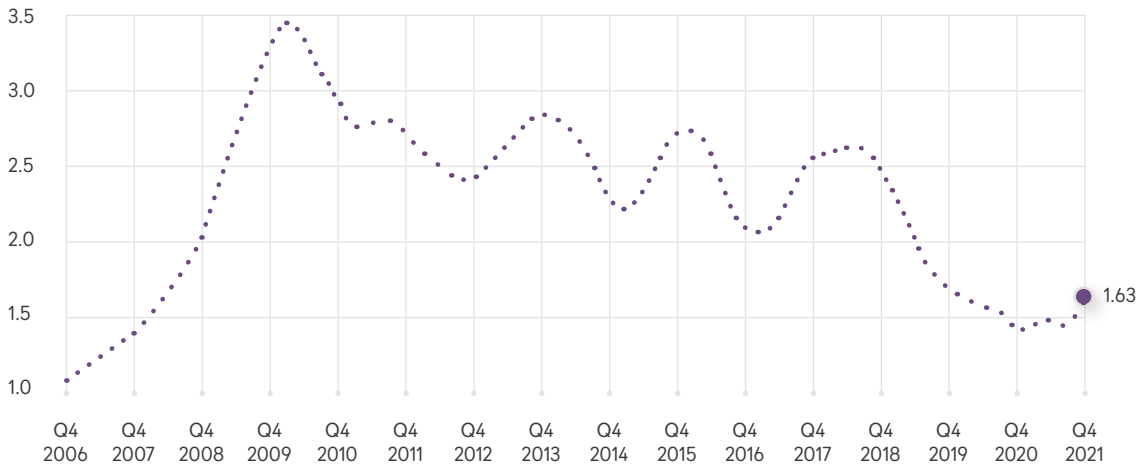
### What do drivers say is wrong with local roads?



Base: All who think condition of their local roads is worse.

## How likely are you to break down as a result of hitting a pothole?

The RAC Pothole Index tracks how much more likely it is compared to 2006, e.g. 2.0 = twice as likely.



A 12-month rolling measure of the share of RAC pothole fault breakdowns compared to 2006, corrected for seasonal weather effects and improving longer term vehicle reliability.

## RAC Pothole Index

RAC Breakdown data supports drivers' views on local road conditions: RAC patrols attended more than 10,000 pothole-related breakdowns in 2021, the highest total since 2018. Meanwhile, the RAC Pothole Index, which analyses pothole-related breakdowns together with the seasonal effects of the weather to give a true long-term indication of the condition of the UK's roads, now stands at 1.63, up from 1.48 at the end of September 2021. This means that drivers are over one-and-a-half times more likely to break down after hitting a pothole today than when the RAC began collecting this data in 2006.

The 2022 edition of the annual survey carried out by the Asphalt Industry Alliance (AIA) once again indicates that local authorities in

England and Wales do not have the funding to keep roads in a reasonable condition. The AIA's current Annual Local Authority Road Maintenance (ALARM) report<sup>1</sup> states that despite a 4% increase in average highway maintenance budgets, councils are investing less money in carriageway repairs. As such, the reported backlog of repairs has increased by almost 25% to over £12 billion: according to the AIA's estimates, this will take more than a decade to complete.

**86%**

have had to steer to avoid a pothole on several occasions

1. [www.asphaltuk.org/wp-content/uploads/ALARM-survey-2022-FINAL.pdf](http://www.asphaltuk.org/wp-content/uploads/ALARM-survey-2022-FINAL.pdf)



## 3.2 Repairs and taxation

This year, we looked at driver views on whether they felt repairs to local roads were completed to an adequate standard. The findings show that even when authorities are managing to repair local road surfaces, drivers are generally unhappy with the quality of the work: 55% rate

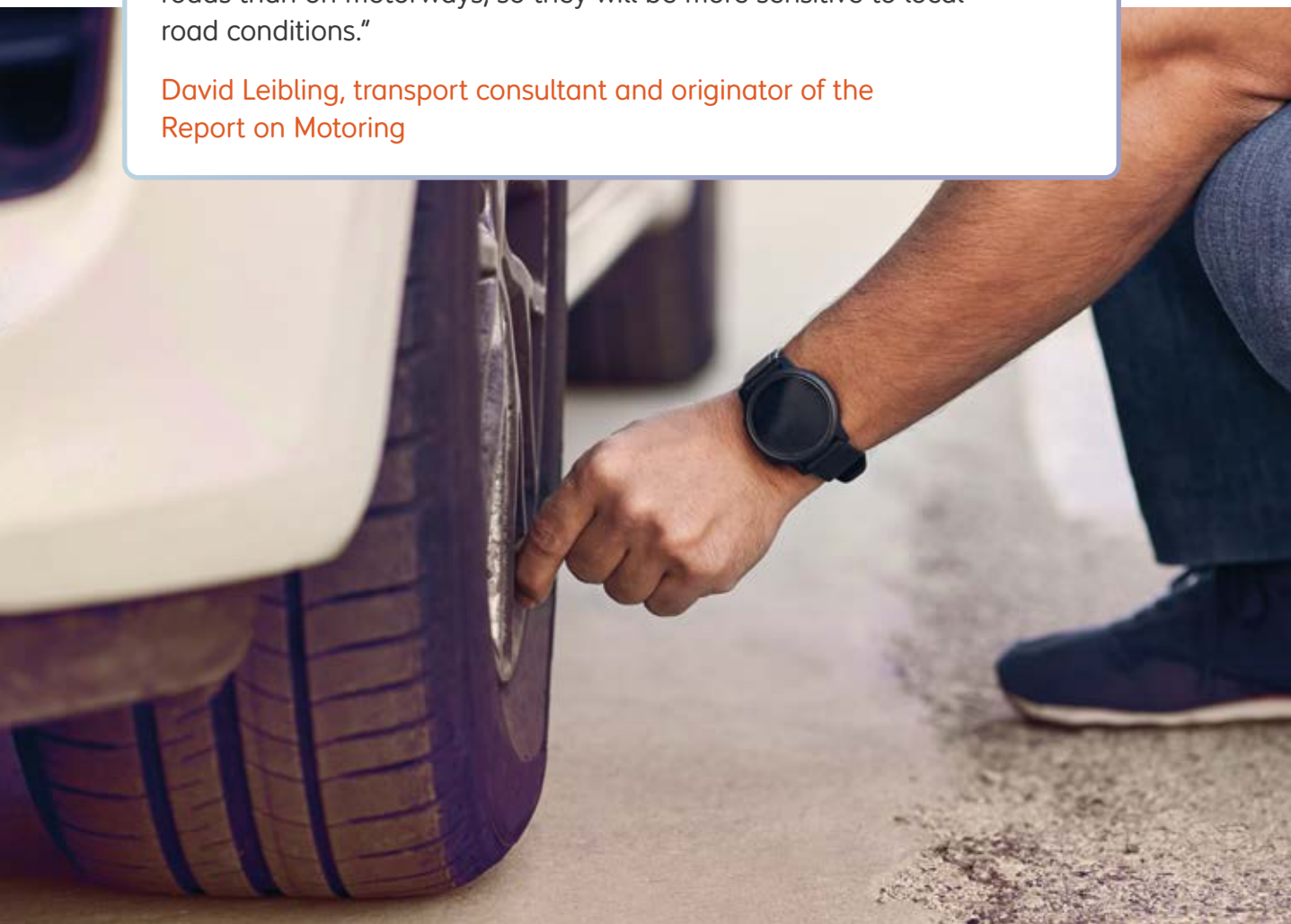
the standard of pothole repairs in their area as 'poor' or 'very poor'. Dissatisfaction is higher in older age groups: 60% of those aged between 45 and 64 say repairs are poor, as do 57% of those aged 65 and older.



### ... Expert view

“Older motorists are likely to be doing more of their driving on local roads than on motorways, so they will be more sensitive to local road conditions.”

David Leibling, transport consultant and originator of the Report on Motoring



It is encouraging, therefore, that the Government plans<sup>2</sup> to introduce new measures designed to penalise utilities and construction companies which leave road surfaces in sub-standard condition after completing street works. Firms which fail to meet strict criteria for the quality of their repair work will face more rigorous inspections and, ultimately, severe financial penalties.

55%

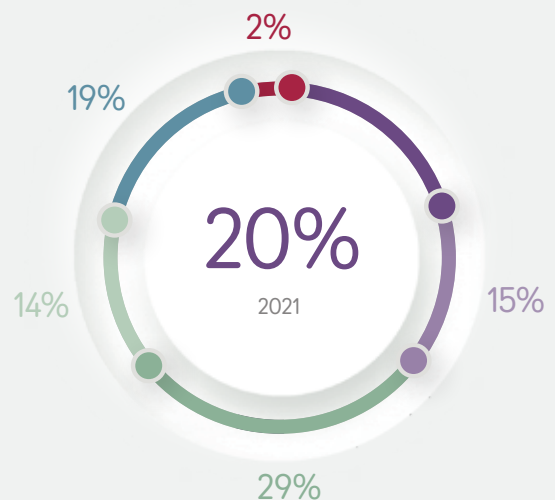
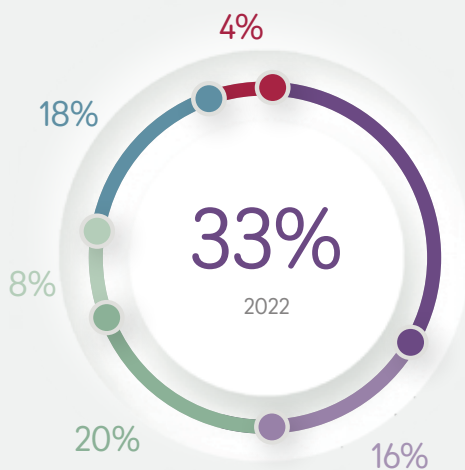
rate the standard of pothole repairs in their area as 'poor' or 'very poor'

Drivers support the idea of a proportion of current motoring taxation being ringfenced in order to fund local road maintenance: 80% say they would back such a plan. But there has been a decline in the number of drivers who say they would be willing to pay a higher level of fuel duty provided this money was ringfenced for a local pothole fund. Only 28% support such a proposal in 2022, down from 43% in 2021 and 47% the previous year. No doubt the recent increases in the cost of fuel, not to mention the wider economic outlook, have influenced drivers' feelings in this area. However, the RAC continues to believe the local road network needs some form of ringfenced funding to allow councils to properly and regularly maintain their roads.

## Do drivers support paying a higher rate of fuel duty, if the extra money is ringfenced for fixing local potholes?

Far fewer drivers support this idea this year compared to last

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



2. [www.rac.co.uk/drive/news/motoring-news/uk-companies-responsible-for-plague-of-potholes-set-for-new-government-penalty/](https://www.rac.co.uk/drive/news/motoring-news/uk-companies-responsible-for-plague-of-potholes-set-for-new-government-penalty/)





... **Expert view**

“ The condition of local roads is heavily impacted by the sheer quantity of utility company works which seem to have blossomed over the last two years; it’s not just the disruption caused by the work but the mixed quality of reinstatements to the road surface that causes problems.”

**Steve Gooding, director, RAC Foundation**



## 3.3 Motorways and high-speed roads

There is greater satisfaction with the state of the UK's motorways and high-speed roads than with local roads. However, conditions on major roads show little sign of improving according to drivers: a third (33%) say that the condition of motorways and high-speed roads has deteriorated in the past 12 months, compared with 28% in 2021, and only 4% of drivers think conditions are better now than a year ago.

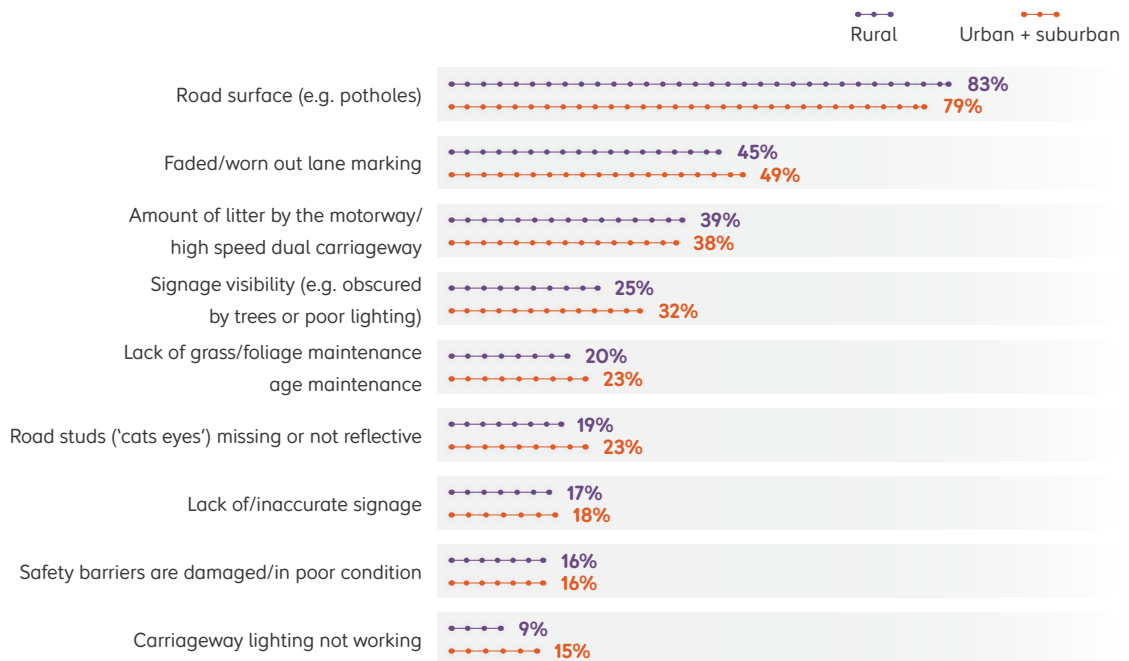
1 in 3

say the condition of motorways and major A-roads has worsened over the last year

Of those drivers who say major road conditions have worsened, 80% cite the quality of the road surface, although this is down from the 88% recorded in 2021. As is the case with local roads, faded or worn line markings are a serious issue (48%), as is roadside litter (38%), signage visibility (30%) and a lack of grass and foliage maintenance (22%). Some 22% complain of missing or unreflective cat's eyes.

Finally, 53% of drivers say they approve of the current government policy that means money collected from vehicle excise duty (VED or car tax) is allocated to fund motorways and the wider high-speed network.

### What do drivers say is wrong with motorways and major A-roads?



Base: All who think condition of motorways and high speed dual carriageways near them is worse.



## 4. Personal mobility after the pandemic

The Covid-19 pandemic has done nothing to weaken the bond between Britain's drivers and their cars, the 2022 Report on Motoring has found. Drivers are more than twice as likely to say they have become more dependent on their vehicles than before the pandemic, while an overwhelming majority would find it very difficult to adjust to life without a car.

Following the lockdowns of 2020 and 2021, the use of cars to commute to offices or other workplaces has recovered to some extent, but many businesses have continued to use some form of hybrid working arrangements for their staff. As such, fewer people are commuting five days every week than before the pandemic.

Covid has done little to boost public transport usage, or willingness to take a bus or train as an alternative to driving. Buses – despite being the most common form of public transport – in particular remain an unpopular option, although train usage shows signs of recovery.

## 4.1 The growing importance of cars

The experiences of the past two years have increased the importance of cars for the UK's drivers: a quarter (25%) say they have become more or much more dependent on their vehicles than before the pandemic, while only 11% say they have become less dependent.

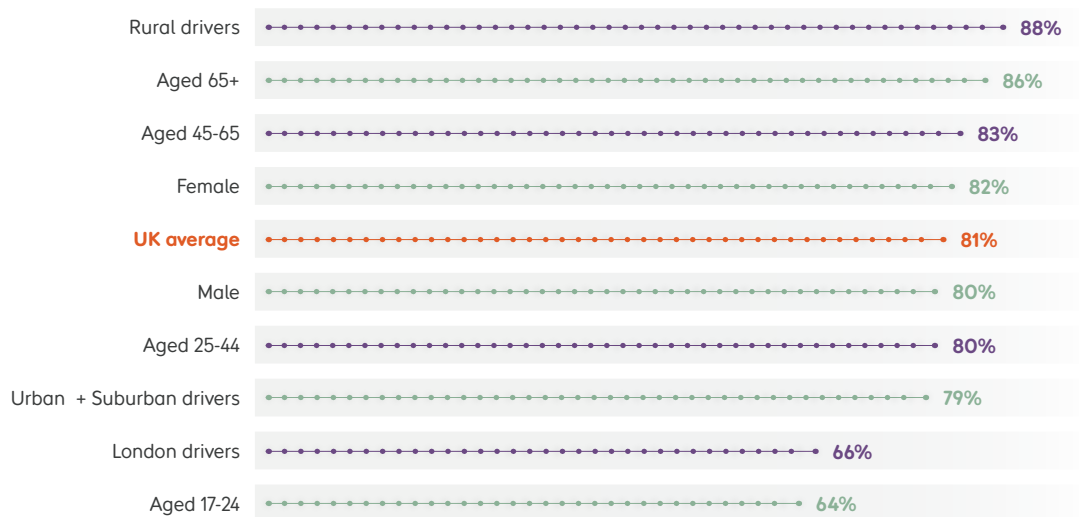
Dependence is significantly higher among young drivers – 41% of those aged under 25 say they have become more reliant on their cars since early 2020 – while dependency is also higher among those aged 65 and over with 29% saying they are more dependent.

81%

would find it very difficult to adjust their lifestyles to being without a car

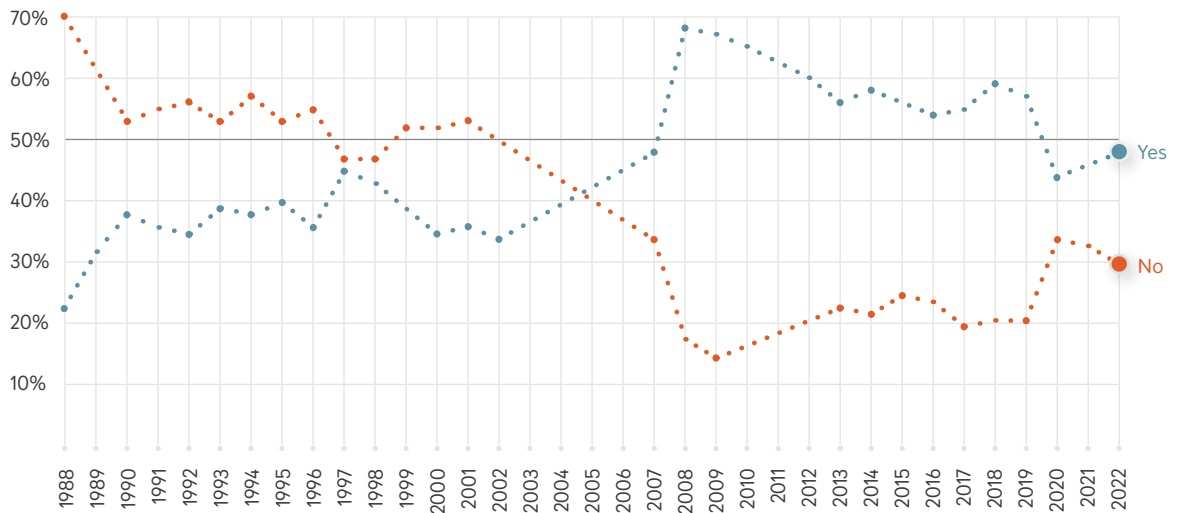
Some eight in 10 drivers (81%) say they would find it very difficult to adjust their lifestyles to being without a vehicle – a level practically unchanged since the 82% reported in 2021, and since the Report on Motoring began in 1989. This year, 88% of drivers in rural areas agree with this statement. Despite this, more than half (52%) of drivers in 2022 say they generally walk or cycle on short journeys in preference to driving.

### Drivers who say they would find it very difficult to adjust to being without a car





## Would drivers use their cars less if public transport was better?



Only 23% of drivers agree that public transport is an attractive alternative to taking the car, and 60% disagree with this statement. What's more, only a minority of drivers (48%) assert they would use their cars less if public transport were better – a trend that began in 2020 and seems to be persisting as this figure previously stood at 59% in 2018 (see above).

23%

think that public transport is an attractive alternative to taking the car







## 4.2 Problems with public transport

Just under half of drivers (49%) say they never take a bus for any purpose – such as commuting, for a leisure journey or to go shopping – while a third (33%) say they use buses less than once a month. Looking at how bus services could be improved to tempt drivers to use them more frequently, 38% say they want buses running to and from places that aren't served currently, while 34% require more regular services, and 32% want lower fares and more reliable buses. But perhaps most strikingly of all, some 31% of drivers maintain there are no improvements that could be made to bus services that would convince them to use this type of transport – underlining the challenge facing local authorities and public transport companies in getting drivers out of their vehicles.

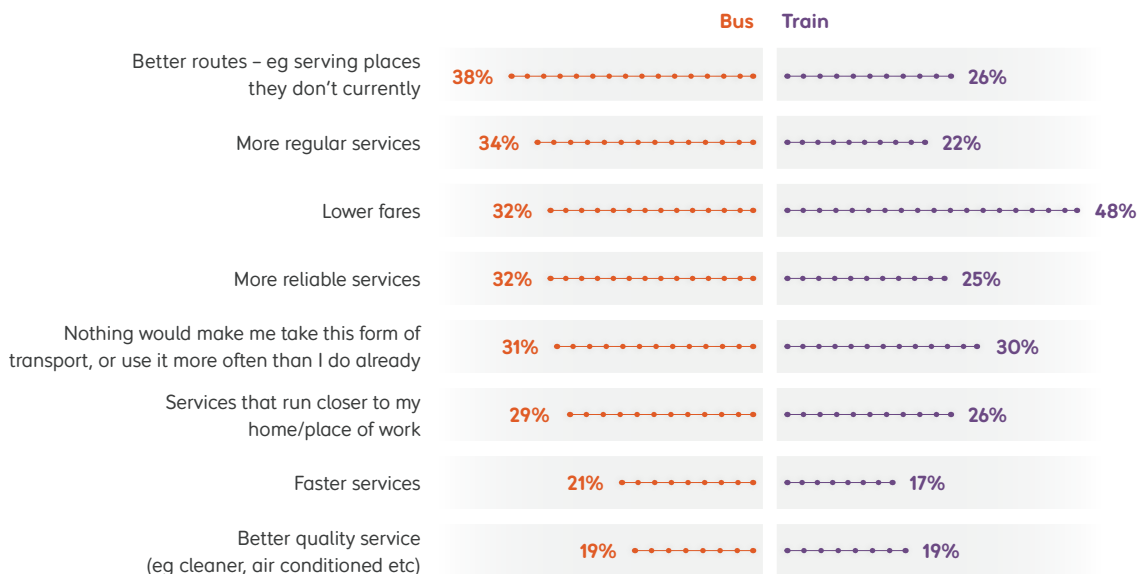


### ... Expert view

“These findings suggest that the image of public transport among motorists is particularly bad: if drivers don't have to use buses and trains, they will not.”

Theo de Pencier, non-executive board member, Transport Focus; former chief executive officer, Logistics UK

### What changes to buses or trains would make them more attractive to drivers?





Looking at train use, 37% of drivers say they never take the train while 46% use trains less than once a month. However, 16% of drivers say they use trains at least once a month, suggesting that train usage is starting to return to pre-pandemic levels.

The main change that would encourage drivers to use trains more as an alternative to the car is lower fares (48%) followed by stations closer to where they live or are going or better routes (both 26%), and more reliable services (25%). For 30% of drivers though, nothing would persuade them to take the train instead of driving.

**22%**

of drivers use a bicycle for non-leisure purposes, such as commuting

More than a fifth of drivers (22%) say they use a bicycle for non-leisure purposes such as commuting, with 12% doing so at least once a month. Almost a third (31%) use a bike for recreation. Most drivers (59%) say nothing would persuade them to take up cycling, but 23% say that the creation of segregated cycle lanes would encourage them to use a bike instead of their cars.

Data published by the Department for Transport<sup>1</sup> indicates that in the early months of 2022, usage of the National Rail network had returned to around 80%-90% of its pre-pandemic level, with bus usage outside London in the 75%-85% region. However, Covid-19 appears to have prompted a significant rise in the number of cycle journeys being made every day in the UK when compared with the pre-pandemic baseline, particularly – though not exclusively – during the summer months.

1. [www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic](https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic)



## 4.3 Commuting and hybrid working patterns

For Britain's drivers, their cars are by far the main mode of transport used for commuting: in 2022, 69% say they travel to work using their own vehicle on their own, while just 5% share the trip with someone else – either a family member or a colleague.

In the 2021 Report, 62% of drivers said their car was their main mode of commuting. However, the change over the past 12 months can largely

be attributed to the decline in the number of drivers working mainly or exclusively from home, which has fallen from 16% in the wake of the early 2021 lockdown to 8% this year.

Data published in May 2022 by the Office for National Statistics<sup>2</sup>, meanwhile, suggests that the majority of people in England, Scotland and Wales who started working from home as a result of Covid-19 will continue to do so at least part of the week for the foreseeable future. The ONS found that more than 80% of those who had worked from home during the pandemic intend to carry on with some form of hybrid working pattern in 2022 and beyond.

69%

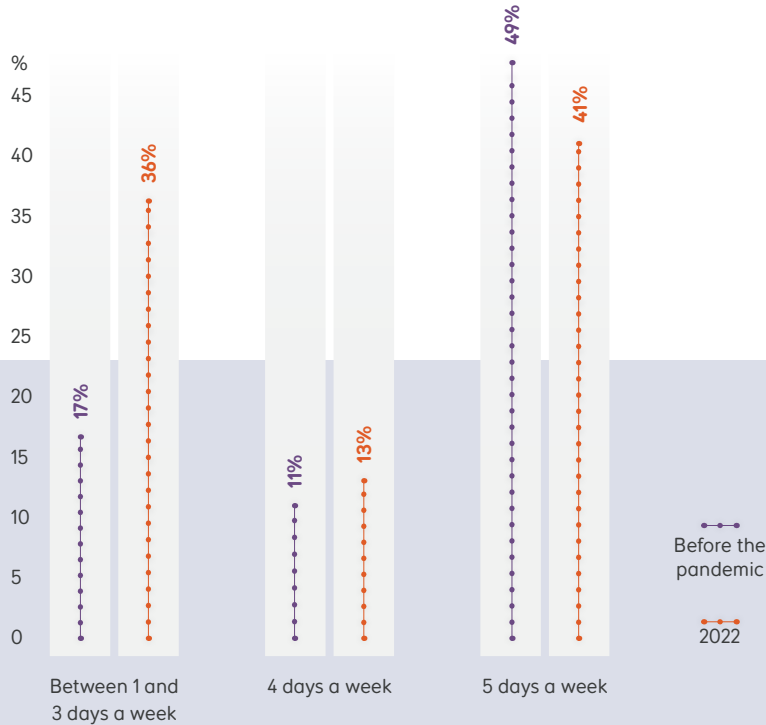
say they travel to work using their own vehicle on their own



These figures are supported by the Report on Motoring, which found that just 41% of drivers typically commute a full five days a week, compared with 49% who did so before the start of the pandemic. There has been a sharp rise in the number of drivers who commute just one day a week – from 4% pre-pandemic to 13% at present, while the number that commute two days in the average week has risen from 4% to 10%. A further 12% drive to work three times a week (9% pre-pandemic) and 13% commute four days a week (11% in the 12 months prior to March 2020).

DfT data<sup>3</sup> indicates that weekday car use has returned to near pre-pandemic levels in the early months of 2022, while weekend car use is higher than in the period immediately before Covid-19 hit the UK in March 2020.

How many days a week do drivers use a car to get to and from work?



2. [www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/isahybridworkingheretostay/2022-05-23](https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/isahybridworkingheretostay/2022-05-23)  
3. [www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic](https://www.gov.uk/government/statistics/transport-use-during-the-coronavirus-covid-19-pandemic)









## 5. Next car choice: The electric route to 2030

The financial pressures facing UK households mean that drivers are planning to hold onto their current cars for longer than in recent years, the 2022 Report on Motoring has found. But this year has also seen a sharp rise in the number of drivers who are planning to switch to a battery-powered electric vehicle when they do decide to move on from their existing model: a record 14% say their next car will be electric, while 15% expect to choose their first electric car within the next five years.

It is encouraging that this pro-electric trend is continuing to gain momentum following the Government's decision, announced in November 2020<sup>1</sup>, to ban the sale of new petrol and diesel cars from 2030. Lower running costs and reduced environmental impact are two of the key reasons drivers give for planning the switch to electric cars, but there remain a number of obstacles to wider take-up. These include concerns about the availability of new electric vehicles, the number of public charge points, not to mention the rising cost of domestic electricity.

The 2022 Report also asked drivers for their views on potential changes in the vehicle tax system, which will be needed as the number of petrol and diesel vehicles on UK roads decreases and fuel duty revenues fall. Most drivers are worried that the introduction of a 'pay-as-you-drive' tax regime could lead to an overall increase in taxation levels, but a majority accept that some type of reform is likely to be needed by 2030.

33%

live somewhere  
where they can't  
charge an electric car

1. [www.gov.uk/government/news/government-takes-historic-step-towards-net-zero-with-end-of-sale-of-new-petrol-and-diesel-cars-by-2030](https://www.gov.uk/government/news/government-takes-historic-step-towards-net-zero-with-end-of-sale-of-new-petrol-and-diesel-cars-by-2030)





## 5.1 Moving to a new vehicle

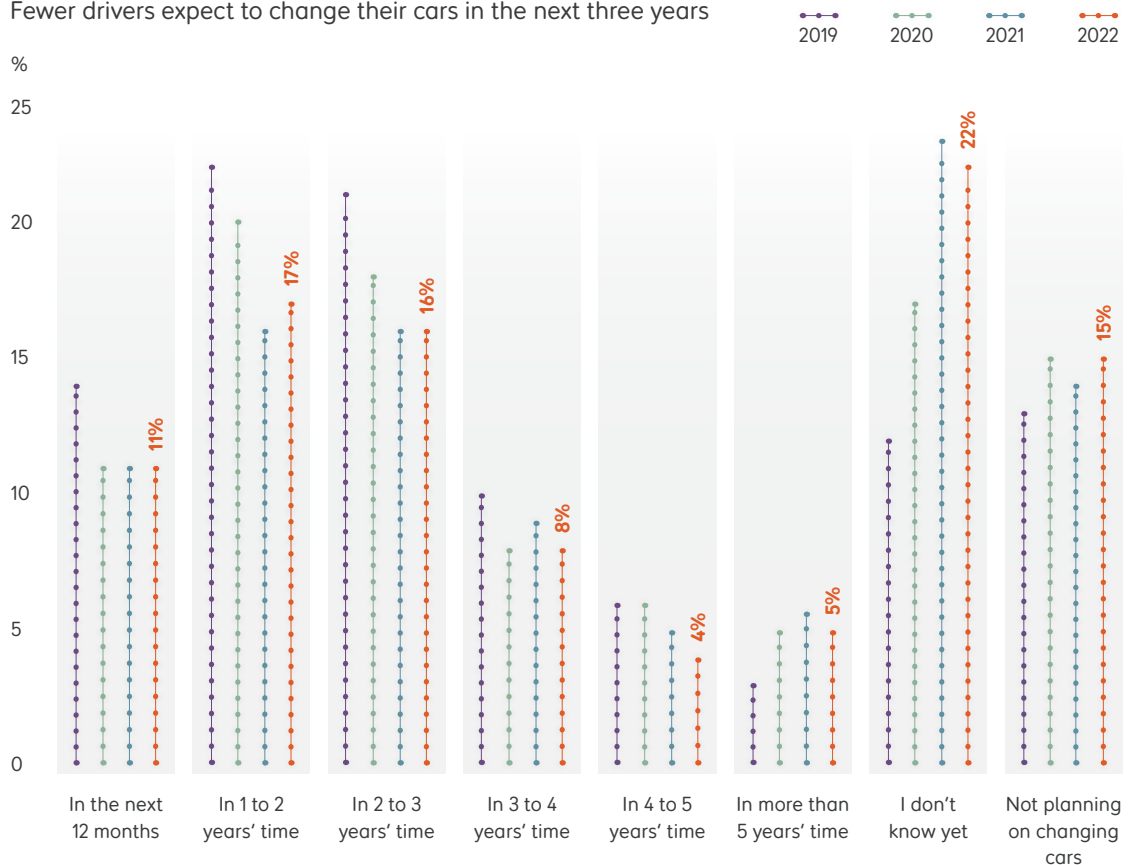
In recent years, the number of drivers who plan to change their vehicle in the near future has declined steadily: only 28% of drivers in 2022 say they expect to move to a different model within the next two years compared with 36% in 2019 and 45% in 2018. And this year, 37% of drivers have no plans to change their cars or don't know when they will do so, up from 33% in both 2021 and 2020, and 25% in 2019.

There are a number of factors underpinning this trend, not least the increased financial

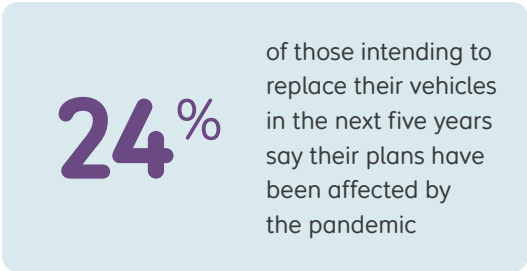
pressures associated with the pandemic and the high levels of inflation that have followed in its wake, and which have been exacerbated by the war in Ukraine. The lack of new vehicles due to a global microchip shortage and a price-inflated used-vehicle market have also contributed to the slump in demand. Additionally, many drivers have simply been using their vehicles less since 2020 due to movement restrictions and a reduction in commuting, so may not feel the need to replace them as soon.

### When do drivers next expect to change their cars?

Fewer drivers expect to change their cars in the next three years



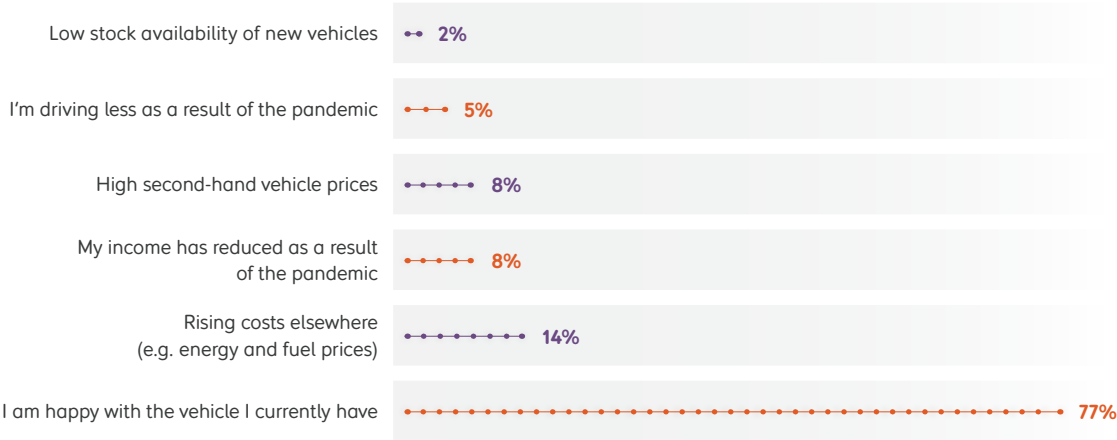
Among drivers who are not planning to change their vehicle in the next five years, the majority (77%) say this is simply because they are happy with their current model. But 14% point to the rising costs of energy and fuel, while 8% blame high second-hand vehicle prices and the same proportion (8%) say their income has reduced as a result of the pandemic.



Looking at drivers who do intend to get a new car in the next five years, 24% say their plans to trade up have been delayed by the pandemic and related issues. Of this group, 47% say they have postponed a change because of high second-hand prices while 38% are driving less as a result of the pandemic. A further 37% say their income has fallen due to Covid-19 and 29% point to problems with the availability of new vehicles.

### Why aren't drivers planning on changing their vehicles?

While external factors are the reason for some people, most people are just comfortable with the cars they have







## 5.2 The rise of electric cars

Fewer drivers than ever plan to buy a conventionally fuelled vehicle as their next car, the 2022 Report has found. This year, just 41% of drivers say their next vehicle will run on petrol – down from 45% in 2021 and 58% back in 2017 – while only 13% will opt for diesel (16% in 2021). Conventional (19%) and plug-in hybrid (10%) vehicles account for a significant portion of preferences, but there has been a sharp rise this year in the number of drivers whose next car is expected to be a pure-electric, battery-powered vehicle. At present, 14% plan to select this option, up from 10% last year and just 3% in 2018.

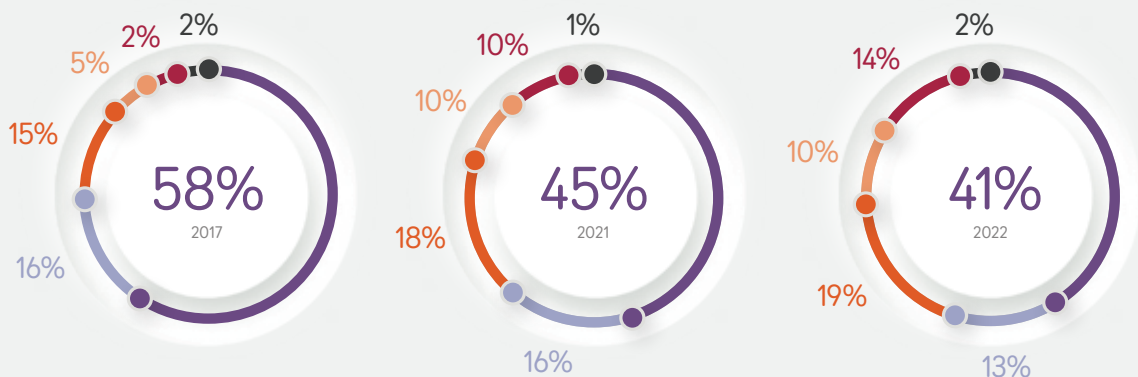
14%

say their next car will be a battery electric model, up from 10% in 2021

### How do drivers expect their next vehicle to be powered?

Desire for battery electric vehicles continues to rise steadily

● Petrol ● Diesel ● Conventional Hybrid ● Plug-in Hybrid ● Battery electric ● Other





... **Expert view**

“ The financial advantages of running an electric car are one of the most important benefits to consumers. We need to make sure those benefits aren’t inadvertently reduced. Higher electricity costs and the 20% VAT rate on public charging could damage adoption rates dramatically.”

Quentin Willson, motoring journalist and transport campaigner

While a greater than ever proportion of drivers expect to get an electric car next time around, slightly fewer (15%) expect to get one within the next two years compared to what drivers reported last year (17%). There is also a risk the Government’s recent ending of the plug-in grant<sup>2</sup> may dampen enthusiasm in the future.

Last year, the most common reason behind drivers planning to go electric was concern about the environmental impact of petrol and diesel cars, cited by 66% (a figure which has fallen to 57% in 2022). This has been

overtaken by the appeal of lower running costs, highlighted by 64% of drivers compared to 52% 12 months ago. This has no doubt been exacerbated by the record-high price of petrol and diesel, coupled with drivers becoming more aware of the cost benefits of electric vehicles.

Being able to charge their cars at home, meanwhile, appeals to 56% of drivers who plan to choose an electric vehicle next. Some 33% say they only drive short distances so will be better suited to electric vehicles, 29% say they are attracted by the fact electric cars have fewer mechanical parts that can go wrong, and 27% like the fact they will not have to pay clean-air zone or congestion charges.

**15%**

of drivers expect to get their first electric car within the next five years

2. [www.gov.uk/government/news/plug-in-grant-for-cars-to-end-as-focus-moves-to-improving-electric-vehicle-charging](https://www.gov.uk/government/news/plug-in-grant-for-cars-to-end-as-focus-moves-to-improving-electric-vehicle-charging)

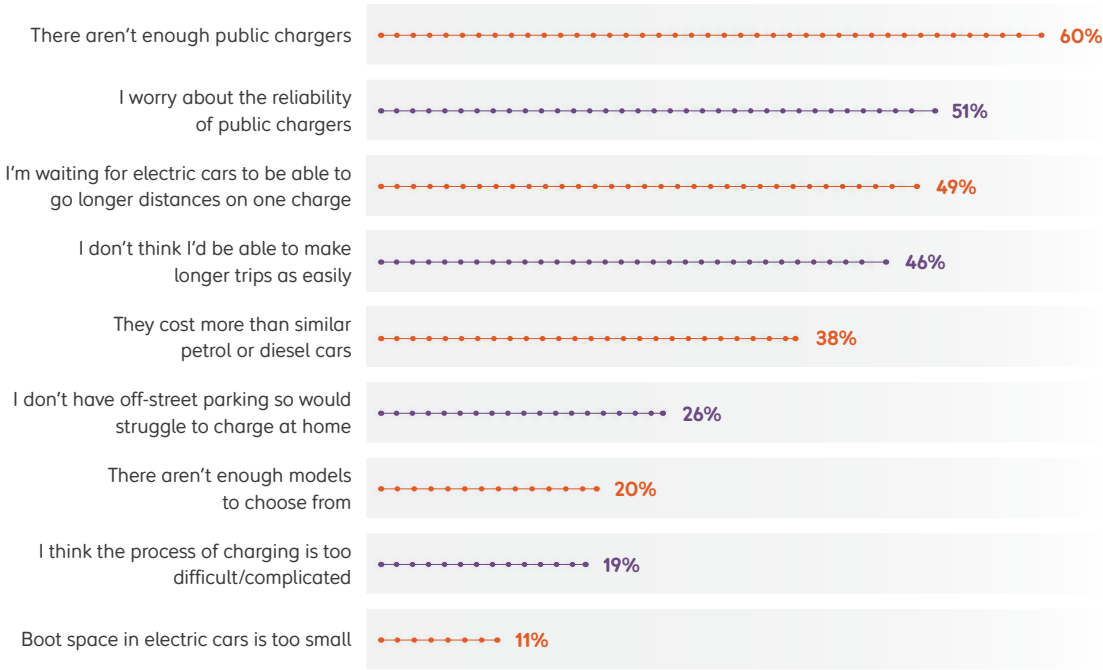
The Report also looked at the reasons why a large majority of drivers – 86% of those that expressed a preference – are not considering an electric vehicle as their next car. Of these drivers, six in 10 (60%) believe there are not enough public charging points, while 51% are concerned about the reliability of the public charging network and 49% are waiting for battery technology to improve the range of electric vehicles.

60%

of drivers who aren't planning on getting an EV next say a lack of public chargers is one of the reasons why

### What's stopping drivers opting for a battery electric vehicle next?

Concerns around public chargers are the top issues







Some 47% of this group say they are put off by the rising cost of electricity, while 46% are concerned about their ability to make long journeys. But remarkably, fewer drivers this year have been put off by the price of battery-powered cars: only 38% say this is an issue, down from 57% in 2021.

Other concerns include a lack of off-street parking, which would make it hard to charge a vehicle at home (26%) and worries over the complexity of the charging process (19%). What's more, only 16% of non-electric vehicle drivers perceive public chargers to be easy to use – a group that can be reassured by the 51% of current electric vehicle drivers who do find them easy.

Interestingly, a significant number of drivers who are currently unsure if, or when, they might make the transition to an electric car

67%

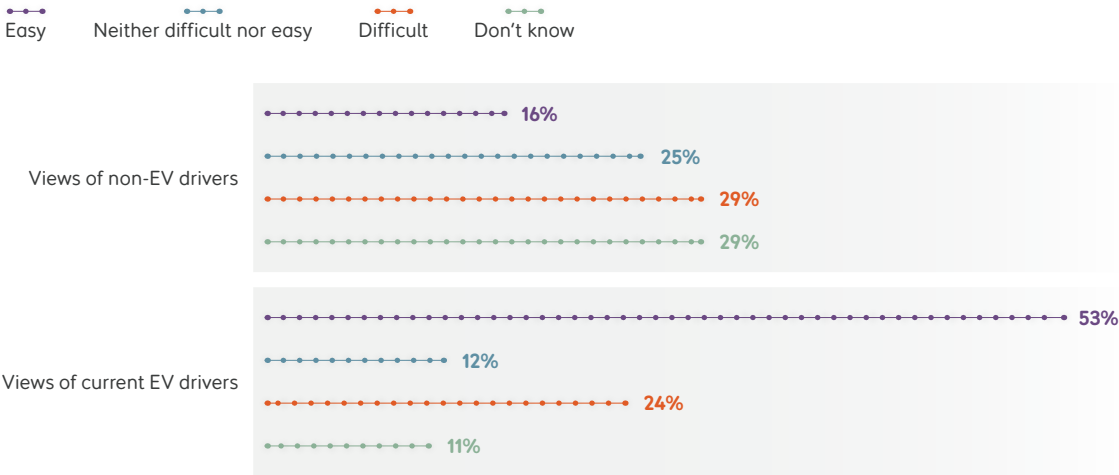
want to be able to charge an EV at the equivalent of a petrol forecourt

are looking for guidance and advice from friends and relatives who already own electric vehicles: 57% say they would seek the opinion of someone they know before deciding whether to buy their first battery-powered car.

The Report found that 62% of drivers have a driveway or garage where they could charge an electric vehicle at home, but 16% can only park on the road – and say no public charge points are available – while 8% rent their homes and cannot therefore install a domestic charge point themselves.

### Perception versus reality – are public EV chargers easy to use?

Most current EV drivers report that public chargers are easy to use



It is worth noting, however, that being able to charge an electric car overnight is not a prerequisite for owning and running such a vehicle provided there are adequate public charging points in the local area at petrol stations and shopping centres, for example. The Report also found that 67% of drivers would want the option of charging their electric vehicles at a public charging forecourt similar to a petrol station.

Finally, even those drivers who are not presently planning to switch to electric cars recognise their benefits: 56% agree such vehicles are better for human health given that they emit no exhaust fumes, 47% accept they have a lower environmental impact than conventionally fuelled alternatives and 29% say they are cheaper to run than petrol or diesel-powered vehicles.



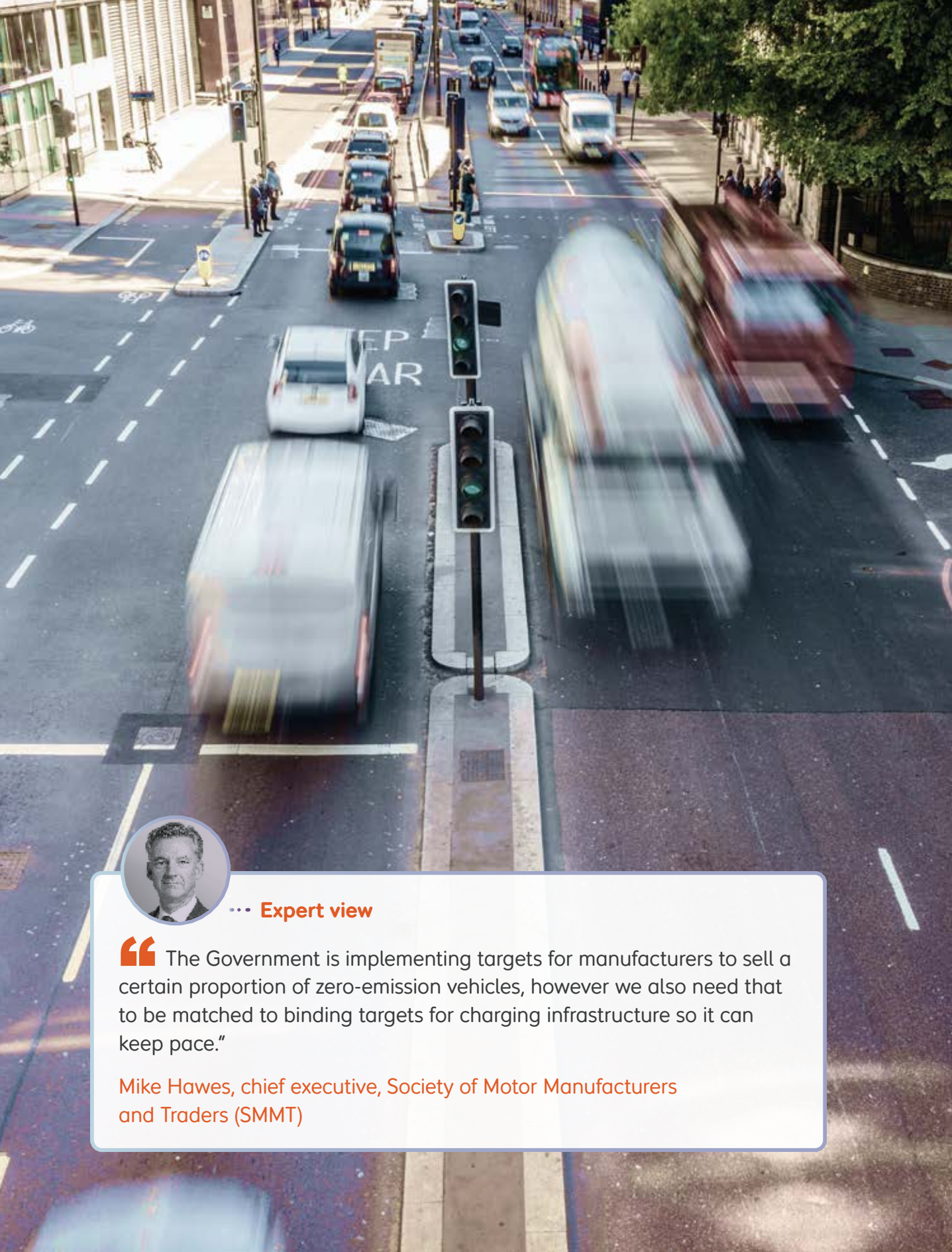
... **Expert view**

“These findings highlight how important it will be to have an effective, easy-to-use national charging network for EVs. The Government needs to support the development of this infrastructure as a matter of urgency.”

Claire Evans, consumer editor, What Car?







... **Expert view**

“ The Government is implementing targets for manufacturers to sell a certain proportion of zero-emission vehicles, however we also need that to be matched to binding targets for charging infrastructure so it can keep pace.”

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

## 5.3 The future of taxation

Given that the number of conventionally fuelled vehicles on the UK's roads will fall in the years ahead, the Government will need to find new ways of raising tax revenues from motorists as fuel duty receipts decline. At present, duty on petrol and diesel is charged at 52.95p per litre following the Chancellor's 5p temporary cut in March's Spring Statement.

One possible solution would involve drivers being charged for the number of miles they drive, with levies potentially changing based on the road type and time of day.

The 2022 Report asked drivers when such a hypothetical change should be made: 52% think a new system should be introduced by 2030, to coincide with the ban on new petrol and diesel car sales, while 22% say they would never wish to see this kind of system implemented.

There are wider concerns about pay-per-mile taxation, however: 75% say they are worried the Government would use an overhaul of vehicle taxation to increase the overall amount that drivers are charged. Two-thirds of drivers (67%) say that money raised from a new system should be at least partly invested in the road network, while 48% agree that vehicles with lower emissions should pay a lower tax rate per mile (24% disagree with this).

75%

are worried the Government would use an overhaul of vehicle taxation to increase the overall amount that drivers are charged





... **Expert view**

“ Perhaps when there is wider recognition that electric vehicle owners are getting away with not having to pay fuel duty, views on this subject will evolve and become more supportive of pay-per-mile taxation.”

Claire Haigh, chief executive, Greener Transport Solutions

More drivers agree (36%) with the idea that a pay-per-mile system would be fairer than the current fuel duty arrangements than disagree (25%) although the remaining 39% are ambivalent or not sure. A third of drivers (32%) say that per-mile charges would encourage them to reduce the number of short car journeys they take, but only 22% would be happy to pay a higher rate to drive during peak periods. Similarly, just 16% say they would be prepared to accept higher charges to drive on motorways than on rural roads.

32%

say that per-mile charges would encourage them to reduce the number of short car journeys they take

The Report also looked at drivers' views on emissions-related charges such as city-centre clean air zones (known as the ultra-low emission zone in London and low-emission zones in four Scottish cities). Only 60% of drivers know whether their car is compliant with the emissions standards enforced in clean-air zones, a figure which rises to 66% for drivers in urban areas, while 37% agree that vehicles with higher emissions should pay a daily charge to enter city centres – although 34% disagree with this statement.

Only 28% of drivers say that such a charge in their local town or city centre would force them to get a compliant vehicle to avoid the extra expense, while 39% say they would not change their car as a result.



Clean air zone  
140 yards ahead



Charges apply  
Pay online







ATSO

THE WILLAGE  
HULLLEY





## 6. The dangers on our roads

The dangerous or illegal behaviour of other motorists remains a major concern for drivers, the 2022 Report on Motoring has found. The poor standard of other people's driving, handheld mobile phone use at the wheel and aggression on the part of other road users are three of the most widespread concerns this year (as highlighted in Chapter 1: What's on motorists' minds in 2022?).

But there are some encouraging signs: compliance with the law on handheld phone use appears to be improving, while admitted instances of drink-driving are below the pre-pandemic – and pre-lockdown – trend.

The number of drivers admitting to speeding on the country's motorways and 60mph roads has risen this year, a change which may reflect the fact motorists have had greater freedom of movement over the past 12 months than during 2020 and the early months of 2021.

Meanwhile, drivers continue to express concern about the safety of smart motorways with most thinking the default 'all lane running' smart motorway configuration should be replaced with the 'dynamic hard shoulder' configuration – food for thought for the Government.



## 6.1 Handheld mobile phones:

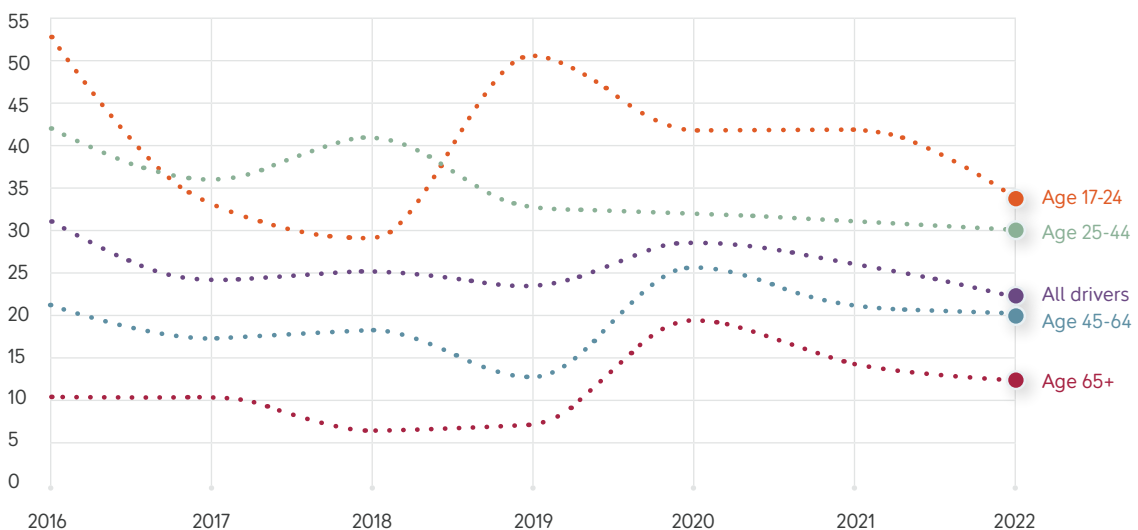
### Signs of improvement

This year, 26% of drivers say other motorists' use of handheld mobile phones is one of their four biggest concerns. While it is still a serious problem, concern has dropped steadily since 2016 and 2017, when 41% and 40% of drivers respectively named mobile phone use a major issue.

So, what is behind this fall in concern? It is worth noting that findings published in the 2016 Report on Motoring, which revealed a shockingly high level of illegal handheld phone use among drivers, prompted extensive media coverage of the subject. This led ultimately to an increase in the penalties for illegal handheld phone use at the wheel in March 2017<sup>1</sup>.

Since that period, the issue has inevitably faded from the public spotlight to a considerable extent. At the same time, there are signs that compliance with the law on motorists' phone use is improving or that people are simply switching to hands-free Bluetooth devices. This year's Report shows that 77% of drivers say they never make or receive calls on a handheld phone, the highest level in the past six years and well above the 69% recorded in 2016. Meanwhile, 91% of drivers never text, email or post on social media compared with only 80% in 2016, 86% never check notifications or messages (73% in 2016), and 94% never take photos or videos (85% in 2016).

### What proportion of drivers have admitted to making or receiving handheld calls while driving since 2016?



1. [www.gov.uk/government/news/double-penalties-for-motorists-using-mobiles](https://www.gov.uk/government/news/double-penalties-for-motorists-using-mobiles)

Compliance with the law around handheld phone use is worse in younger age groups: 34% of under-25s and 30% of those aged between 25 and 44 admit to having made or received a voice call while driving compared with just 12% of those aged 65 and older. Similarly, 22% of under-25s and 23% of the 25-44 age group have checked text messages or other notifications as opposed to just 10% of drivers aged between 45 and 64, and 4% of 65-and-overs. In addition, nearly a fifth (17%) of under-25s admit to video calling while driving – a figure almost unchanged on 2020, which means this group are more than twice as likely to do this compared to the average UK driver. One in 10 (10%) under 25 also say they play games on their phones, compared to the UK average of just 2%.

However, there are signs that compliance among the under-25s has improved substantially over recent years: although the 34% who admit to making or receiving handheld voice calls in 2022 is alarmingly high, the rate was 42% in 2021 and 2020, and 51% in 2019.

17%

of under-25s admit to video calling while driving





... **Expert view**

“Improved compliance with the law on handheld mobile phone use is very encouraging and may be a sign that the legislation introduced by the Government in this area – following excellent work by campaigners – has been effective.”

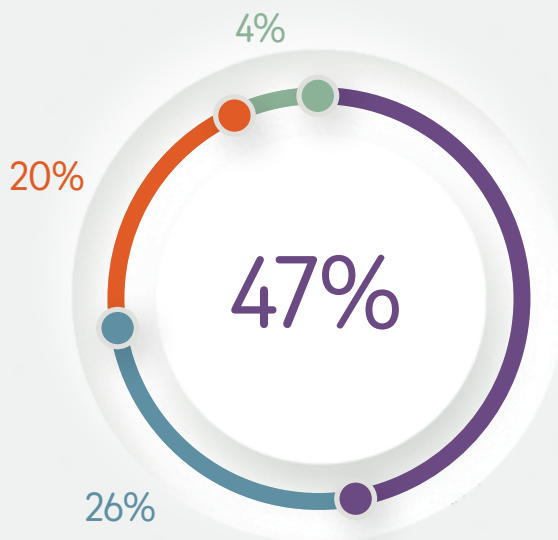
David Davies, executive director, Parliamentary Advisory Council for Transport Safety (PACTS)

There is widespread support among drivers for tougher enforcement of the law relating to handheld mobile phone use: 47% think the most effective way of curbing illegal use is the introduction of new camera technology to detect offenders, which is something the RAC has been recommending for several years,

while 26% say more police officers on the road is the answer. Almost half of drivers (49%) believe the current penalty for handheld mobile phone use while driving of six points on the licence and a £200 fine is reasonable, although 36% say this is too lenient. Only 7% of drivers believe this sanction is too strict.

### How would drivers most like to see the existing mobile law enforced?

- New camera technology that can detect illegal phone use while driving
- More police officers on the road
- Unsure
- Dashcam footage submitted to the police to follow-up







## 6.2 Overall drink-driving trend continues downwards

Concern about other motorists' drink-driving has dropped sharply in the past three years: in 2022 only 14% say this is a top-four concern, down from 28% in 2019.

There has been a small increase in reported drink-driving this year: 7% of all drivers say they think they have driven while over the limit, either immediately after having a drink or on the morning after, compared with 6% in 2021 – although this is perhaps not unexpected given there have been no major lockdowns or restrictions on hospitality businesses in the UK

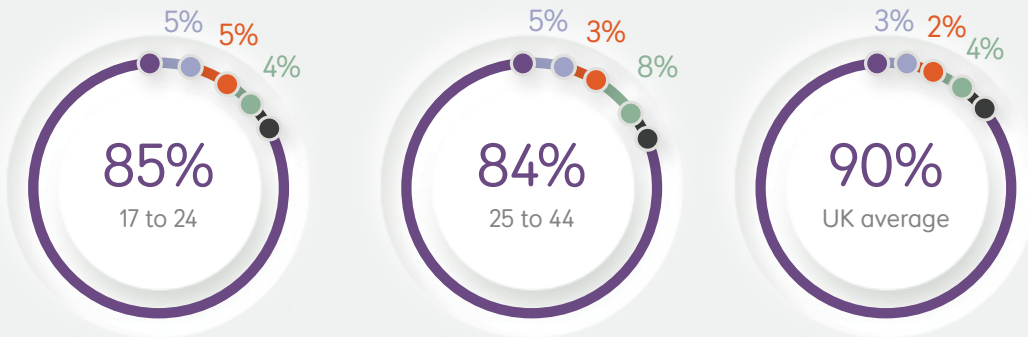
over the past 12 months. Encouragingly, these figures are significantly below the pre-pandemic trend: between 2015 and 2019, the number of drivers who admitted to or thought they had driven while over the limit ranged from 16% to 20%.

However, it is a different story when looking at the 25-44 age group as more than one-in-10 (13%) think they have driven over the legal drink-drive limit – either shortly after drinking or the morning after – while 4% know they have been.

### Drivers who admit to drink-driving

How younger age groups compare to the UK average

- No, I don't think I've driven whilst over the limit
- I think I've driven when over the limit shortly after having a drink
- I know I've driven when over the limit shortly after having a drink
- I think I've driven when over the limit the following morning after drinking the night before
- I know I've driven when over the limit the following morning after drinking the night before



## How could drink-driving be curbed?



This year's Report asked drivers for their views on policy measures that could be introduced to curb drink-driving. There is greatest support (54%) for an increase in the number of roadside breathalyser tests carried out by the police while 43% say offenders' vehicles should be fitted with alcolocks – devices that require drivers to provide a breath sample below the

legal alcohol limit in order to start their car. Interestingly, 32% of drivers think alcolocks should be fitted to all vehicles, not just those driven by people previously convicted of a drink-driving offence. Some 27% think all drivers should be required by law to carry their own breathalyser so they can check they are safe to drive – this rises to 39% among the under-25s.



### ••• Expert view

“One of the major challenges we face at IAM RoadSmart is how to engage younger motorists around improving the standard of their driving. Clearly, new drivers see there are problems with other people's abilities at the wheel, but they need to recognise their own shortcomings as well.”

Tony Kildare, chief executive, IAM RoadSmart



# 6.3 Motorway speeding on the rise

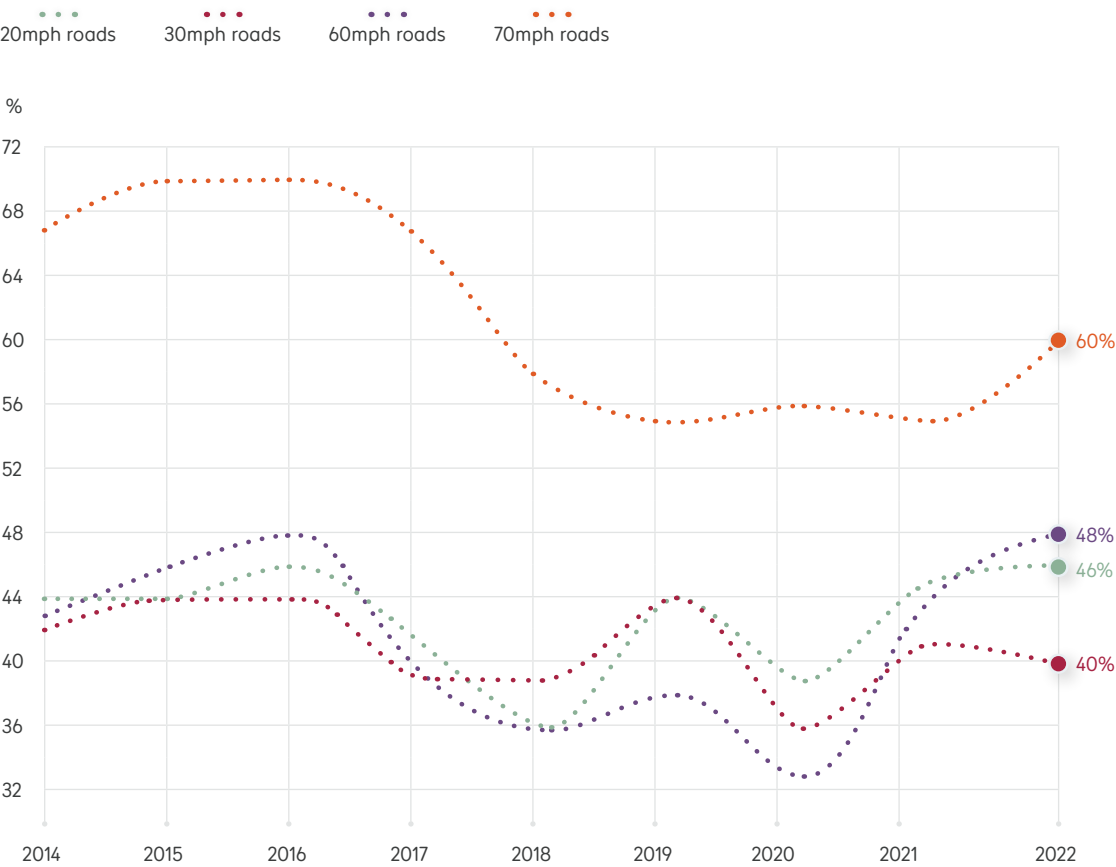
There has been a rise in the number of drivers who admit speeding on the UK's fastest roads in 2022: 60% say they have broken the 70mph motorway limit at least occasionally compared with 55% last year, while 48% have exceeded the limit on 60mph roads (up from 44% in 2021).

The proportion who speed on urban roads has changed very little in the past 12 months: 40% of drivers say they have exceeded the 30mph limit at least occasionally while 46% have broken the limit on 20mph roads.

65%

say that signs warning of speed cameras nearby help them stick to the limit

Proportion of drivers who admit to frequently or occasionally speeding





... **Expert view**

“Almost all new cars now have systems which display the current speed limit and warn the driver if they exceed it. It will be interesting to see how the roll-out of that technology affects speeding in the future.”

**Matthew Avery, chief research strategy officer, Thatcham Research and board member for Euro NCAP**

The most common reason drivers give for exceeding the motorway 70mph limit is that they are travelling at the same speed as other motorists (42%). The same justification is used by 32% of those who break 60mph limits. Almost half of drivers who have exceeded the speed limit in 20mph zones say this is because they think the limit is inappropriate for that particular road.

Most drivers (69%) think motorists only adhere to 20mph limits when there is enforcement or physical traffic-calming measures in place, while 65% say that signs warning of speed cameras nearby help them stick to the limit.

Almost half of drivers (48%) believe some 60mph limits on unclassified rural roads should be reduced, while 52% say they would be opposed to additional 20mph limits being introduced in their local area.

**48%**

believe some  
60mph limits on  
unclassified rural  
roads should  
be reduced



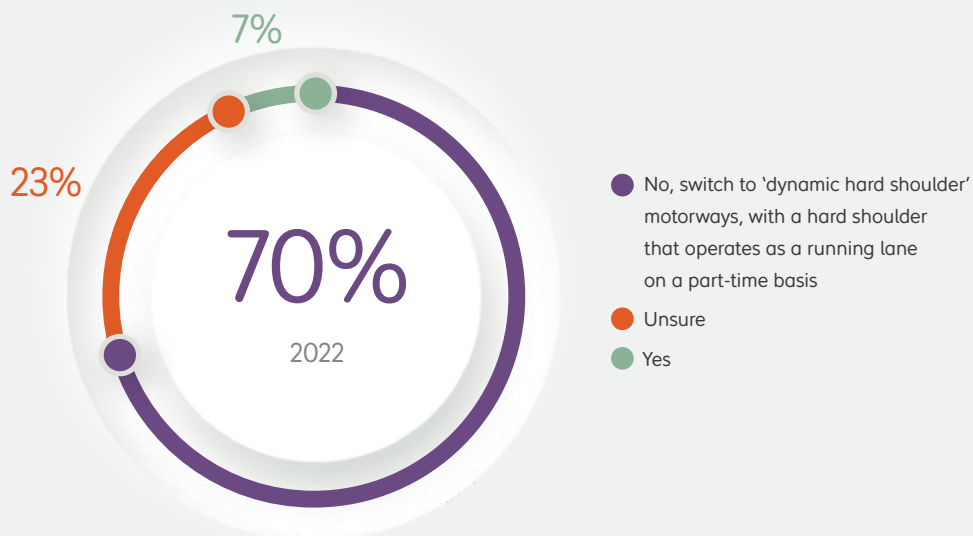
## 6.4 Smart motorway design

Over recent years there has been a considerable amount of controversy surrounding the safety of smart motorways that have been introduced in England – in particular in the 'all lane running' (ALR) configuration, which sees the hard shoulder permanently converted to a running lane. Campaigners, including the RAC, have highlighted the potential danger involved in having no hard shoulder available for vehicles which break down or are involved in collisions. In May 2022, National Highways announced it was on track to upgrade nearly 100 safety cameras so they could automatically detect vehicles which ignore red-X lane-closed signs<sup>2</sup> which are

displayed when there is an incident in the lane ahead. The organisation is also rolling out radar technology to help identify stopped or broken-down vehicles on ALR smart motorways more quickly and effectively.

Nevertheless, the ALR configuration is deeply unpopular, the 2022 Report has found: 70% of drivers say they would like to see the Government proceed with the 'dynamic hard shoulder' configuration, where the hard shoulder is only used as a running lane during busy periods. Only 7% support the further roll-out of the ALR configuration.

Should 'all lane running' motorways still be rolled out?



2. [www.rac.co.uk/drive/news/infrastructure/smart-motorways-collision-figures-released-prompting-new-safety-feature-rol](https://www.rac.co.uk/drive/news/infrastructure/smart-motorways-collision-figures-released-prompting-new-safety-feature-rol)



## 6.5 Recent changes to the Highway Code

Finally, drivers were asked for their views on the new hierarchy of road users introduced in the latest edition of the Highway Code<sup>3</sup> in January 2022: this has created a system which means those road users who can do the greatest harm have the greatest responsibility to reduce the danger they pose to others. As part of this change, for example, pedestrians have the right of way over vehicles when crossing at junctions.

Almost half of drivers (49%) believe, however, that this will make pedestrians less safe while only 17% think the change will increase their safety.

In general drivers tend to believe that responsibility should be shared: 77% say that all road users have an equal responsibility to keep themselves safe.

3. [www.gov.uk/government/news/the-highway-code-8-changes-you-need-to-know-from-29-january-2022](https://www.gov.uk/government/news/the-highway-code-8-changes-you-need-to-know-from-29-january-2022)



# Our work for drivers

2021 – 2022

## Fuel duty cut

The RAC wrote to the Chancellor in early 2022 arguing for a cut in duty and VAT due to fuel prices climbing to record highs. The Chancellor announced a 5p a litre cut in his Spring Statement however, we continue to call on the Government to go further. We have also contributed to the Competition and Markets Authority's recent inquiry into fuel pricing at forecourts.

## Roll-out of 'all lane running' smart motorways paused

For many years, the RAC has expressed huge reservations about the 'all lane running' smart motorways. After giving evidence to two separate House of Commons' select committee enquiries, meeting MPs and campaigning through the media, the Government announced in 2022 that it would pause the future roll-out of these types of motorways pending a review of the data. The Government also confirmed that different types of smart motorways would be considered instead of 'all lane running'.

## Making electric vehicles more accessible for drivers

The Government's long-awaited electric vehicle infrastructure strategy contained some key policy areas on which we had been campaigning. Most notably this included a target of 99% reliability of the public charging network, a commitment to install 300,000 charge points by 2030 (though we also want to see the introduction of an annual target) and improved accessibility for disabled drivers. The strategy also places increased emphasis on charge points where people do not have off-street parking at home.

## Parking code of practice

The RAC was proud to represent drivers as part of the group created to draw up new plans for a national parking code of practice for parking on private land. While the draft code was published, we continue to fight for it to be implemented swiftly and for the cap on charges to be reduced to a lower level than is currently in place.









James,  
patrol since 2017,  
East Midlands



## Daily charge for all vehicles entering Greater London boundary

We opposed the Mayor of London's proposals to introduce a daily 'entry' charge into the Greater London area, arguing this was the wrong charge at the wrong time and the impact would be felt most keenly by those drivers and businesses that depend on their vehicles. We were pleased the Mayor of London changed the plans to target only the most polluting vehicles instead by expanding the existing ULEZ, thus reducing the number of vehicles that would have been affected.

## Fair aftermarket care

The RAC has worked with the Department for Business and the Competition and Markets Authority (CMA) to push for the continuation of a 'motor vehicle block exemption' which effectively allows open access for drivers to choose who they have their vehicles repaired and serviced by and allows garages and breakdown organisations access to vehicle diagnostics. We shall continue working with the CMA throughout 2022.

## Communicating the Highway Code changes

In January 2022, the Government introduced changes to the Highway Code which involved introducing a hierarchy of road users and new rules around vehicles giving way pedestrians at junctions. We worked with Government to communicate these changes more widely by providing drivers with up-to-date and easily available information.

## Safer roads with tougher sentences for killer drivers

The RAC has successfully campaigned for stricter sentencing to be brought in for causing death by dangerous driving. In May 2022, the Government announced it would increase the maximum penalty for causing death by dangerous driving from 14 years' imprisonment to life imprisonment and increase the maximum penalty for causing death by careless driving when under the influence of drink or drugs from 14 years' imprisonment to life imprisonment.

# Our message for government

## Fuel prices

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### Further reduce duty on fuel

Despite the Chancellor's modest 5p a litre cut in fuel duty in the Spring Statement, prices at the pumps have continued to break records this summer with the cost to fill both an average petrol and diesel car exceeding £100 for both fuels. We call on the Government to cut duty further or lower VAT on fuel to provide relief to hard-pressed drivers.

### Pump price transparency

Given the price that drivers are paying at UK forecourts, we encourage the Government to be more transparent with receipts by showing the amount of fuel duty charged as well as the VAT which is already shown every time they fill up their vehicles.

## Road conditions

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### Condition and maintenance of local roads

The condition and maintenance of local roads remains a key concern for drivers. The RAC calls on the UK Government to set out a long-term funding strategy for local roads to improve and guarantee their condition into the future 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.

### Condition and maintenance of motorways and dual carriageways

We are concerned by the growing proportion of drivers highlighting issues on the strategic road network such as faded line markings, a lack of foliage maintenance and street lighting not working. We encourage National Highways to publish a strategy on improving maintenance and repairs in these areas.

## Zero-emission driving

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### VAT on public chargepoints

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 chargepoints from 20% to be in line with the 5% levied on domestic electricity. Such a move would have the broad support of both owners of electric and conventional vehicles.

### Reinstate the plug-in car grant

Despite a recent extension to outstanding purchases, the RAC is disappointed the Government has effectively ended the plug-in car grant before 2023 and believes that up-front cost remains a barrier for mass EV uptake. Therefore, the Government should reintroduce the plug-in car grant for electric vehicles with a list price below £32,000 until at least the end of 2023 to continue stimulating take-up of EVs at more affordable end of the market.

### Set targets for charging infrastructure

While electric vehicle registrations are growing, charging infrastructure appears not to be keeping pace. The number of electric vehicles per public chargepoint has increased in the last two years. We strongly urge the Government to set an annual target for the number of new public chargepoints to be installed which is proportional to the number of new electric vehicles coming on to the roads. This way EV owners will always be able to charge up when they need to away from home.



Department  
for Transport



## Road safety

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### Smart motorways

The RAC remains concerned about the risk to broken-down vehicles on 'all lane running' (ALR) smart motorways. Given the Government's recent pause in the future roll-out of these smart motorways, we would encourage it to look at the more popular option of using the 'dynamic hard shoulder' configuration. As well as having a better safety record, we also believe this type of smart motorway is better able to accommodate changes in future traffic volumes.

### E-scooter regulation

If privately-owned e-scooters are to be allowed on public roads when the Transport Bill goes through Parliament their use must be made as safe as possible. We believe all scooters must be fitted with important safety features such as speed limiters, front and rear lights, indicators, minimum tyre size and number plates. In addition, we urge the Government to demand users hold a driving licence and that insurance is mandatory.

### Segregated cycle lanes

The Report highlights that segregated cycle lanes could encourage almost a quarter of drivers to switch to cycling. The RAC therefore encourages local authorities to find ways to improve cycling infrastructure on local roads to help promote active travel for shorter journeys including the creation of segregated cycle lanes which do not impede the flow of traffic.

### Enforcing illegal use of handheld mobile phones

The RAC believes there are still too many instances of illegal handheld phone use at the wheel, endangering other road users. We call on the Government to introduce new camera enforcement technology similar to systems used in other countries around the world to enable police forces to clampdown on this dangerous behaviour.

### Implement vehicle safety standards

As of July 2022, 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 for the benefit of road safety.

## Taxation

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### Reforming taxation

Once again, this year's findings show that drivers are reasonably relaxed about the idea of a road usage-based tax to replace fuel duty. As the number of electric vehicles increases and the number of conventional vehicles decreases, fuel duty revenue will fall further leaving a taxation shortfall. Now is the right time for the Treasury to launch a future motoring taxation taskforce to discuss what a future scheme should look like.



# Drivers and their vehicles at a glance

Below is a summary of survey respondents' vehicles and usage:



## Approximate number of miles driven over 12 months

Miles driven	%
5,000 miles or fewer	32
5,001-10,000 miles	37
10,001 miles or more	22



## Number of cars per household

Households with	%
One car	47
Two cars	36
Three cars	11
Four cars	4
Five or more cars	3



## Age of vehicles\*

Motorists who own a car	%
Less than a year old	5
1-2 years old	7
2-3 years old	9
3-4 years old	13
Between 5 and 10 years old	37
More than 10 years old	28

## Average number of cars

In household	1.8
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\*Age of vehicle driven most often







# Research methodology

The RAC Report on Motoring 2022 is based on a large-scale online survey carried out by Online95 on behalf of the RAC. In total, Online95 interviewed 3,102 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 28 April to 13 May 2022, 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 opposite 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, 2,253.



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%
2,253	±1.24%	±1.65%	±1.89%	±2.02%	±2.06%

**How to read the above table:** Assume the reported percentage, with an effective sample base of 2,253, is 23%. The closest column to this reported percentage is the '20% or 80%' column. The significant difference on the table shows ±1.65%. This means that 95 out of 100 surveys (reflecting the 95% level of confidence) with an effective sample size of 2,253 will produce a percentage of 23%, plus or minus 1.82%, or within the range of 21.35% and 24.65%.

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 12.9m UK personal and business members. Whatever the driving need, we have a range of mobility and driving services and solutions – from breakdown assistance to insurance, and everything in between – increasingly enabled by digital, data and technology.

Headquartered in the West Midlands with around 4,000 staff, the RAC operates from three bases – Walsall, Manchester and Bristol – with its vehicle and breakdown services underpinned by its nationwide, branded patrol force, focusing primarily on vehicle repair and recovery. In 2021, the RAC attended to 2.3m 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 we have a network of more than 700 RAC-branded approved garages which carry out repairs to the highest standards for our members. In addition, these garages perform general servicing and MOT work under the trusted RAC name. To make servicing, maintaining and repairing vehicles easier for

drivers we have launched our first RAC Mobile Mechanics who are conveniently able to carry out services and repairs on customers' drives or at their workplaces to save them the hassle of having to take their vehicles to the garage.

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

In addition, we are working to accelerate the switch to electric cars with the launch of EV leasing, home charger installation and a bespoke electricity tariff for EVs. We are also constantly investing and innovating to ensure we are best equipped to look after the cars of today and tomorrow. We have upgraded our fleet of breakdown vans 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 January the RAC also became the first national roadside assistance company to put an electric van into service. While no electric van is yet capable of towing, the Renault Zoe E-Tech van is being used to attend the four-out-of-five breakdowns RAC patrols fix on the spot.

Using our research with drivers, the RAC campaigns at a national level on the biggest motoring issues, including the importance of the car, condition and maintenance of roads, fuel prices and road safety.



### ... **Contact**

For all enquiries related to the RAC Report on Motoring, or for specific data requests, please contact the RAC press team on:

Email: [press.enquiries@rac.co.uk](mailto:press.enquiries@rac.co.uk)

# Advisory panel

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

## **Matthew Avery**

Chief research strategy officer, Thatcham Research, and board member for Euro NCAP

## **David Davies**

Executive director, Parliamentary Advisory Council for Transport Safety (PACTS)

## **Claire Evans**

Consumer editor, What Car?

## **Steve Gooding**

Director, RAC Foundation

## **Claire Haigh**

Chief executive, Greener Transport Solutions

## **Mike Hawes**

Chief executive, Society of Motor Manufacturers and Traders (SMMT)

## **Tony Kildare**

Chief executive, IAM RoadSmart

## **David Leibling**

Transport and motoring consultant and originator of the Report on Motoring

## **Theo de Pencier**

Non-executive board member, Transport Focus; former chief executive, Logistics UK (formerly FTA)

## **Melanie Shufflebotham**

Co-founder, Zap-Map

## **Quentin Willson**

Motoring journalist and transport campaigner








Report author: Chris Torney  
Design: RAC  
Research: Online95  
Analysis: Ragdoll Research & Planning

Stuart, patrol since 2007, South West



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RAC House, Brockhurst, Crescent, Walsall WS5 4AW

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