



OUR FUTURE MOBILITY

Managing Risk on the Roads



Foreword

Our roadways serve as essential connectors, supporting millions of individuals and businesses every day. Ensuring a future-ready infrastructure is critical, not just for today's drivers but also for future generations who will depend on safe, sustainable, and innovative transport systems to drive their lives forward.

The AA is deeply woven into the fabric of UK mobility, both on the ground and at a broader level. We provide essential services, from our trusted breakdown provision to our role in supporting charge point operators (CPOs) manage the transition to electric vehicles (EVs). But we also campaign tirelessly for policy changes that make our roads safer, more efficient, and sustainable. Our goal is to empower drivers, supporting an infrastructure that can adapt to the needs of today, that's also resilient enough to serve the demands of tomorrow.

Over the past year, we've championed several key changes that have made a tangible difference to the businesses. Our campaign for a fuel duty freeze scored a significant victory in the latest budget, delivering a positive outcome that keeps costs manageable. Meanwhile, in our Motoring Manifesto, issued before this year's general election, we pushed for critical incentives for EV adoption, specifically calling for company car

incentives to be extended and for favourable vehicle excise duty rates, allowing more drivers to transition to EVs affordably. These recommendations were reflected in the chancellor's budget, marking another step forward in our journey toward greener transport solutions.

We know that road quality remains another core concern for our members. Poorly maintained roads are a risk for drivers and a burden on business logistics, which is why we continuously press for better funding, more innovation, and more permanent repairs. Through our work with the Pothole Partnership, which we established to address this chronic issue, we've advocated for increased pothole funding and raised our concerns with government ministers and the chancellor directly.

Perhaps one of our longest-standing campaigns - more than a decade in the making - has been for transparency on fuel prices. Recently, we received confirmation from Ed Miliband that a national 'Fuel Finder' will be launched, allowing drivers to see real-time fuel prices and make informed choices. The announcement validates our years of commitment to this cause, led by The AA's fuel price spokesperson Luke Bosdet, and represents a victory for consumers who deserve clarity and fairness in their fuel costs.

As we look to the future, our dedication to building safer, smarter, and more resilient roads is unwavering. The AA will remain at the heart of UK mobility, championing drivers, strengthening essential infrastructure, and driving forward-thinking policies that pave the way for safer roads and smoother journeys. We're excited to continue our work with policymakers, businesses, and communities alike to shape a brighter, more connected future for mobility in the UK.

Edmund V King OBE
AA President



Keeping business moving

When it comes to managing risk on our roads, there's a multitude of factors at play. First and foremost, we're talking about road safety, that of drivers, passengers, and pedestrians.

In the UK, someone is killed or seriously injured on the roads every 16 minutes (Department for Transport). Every death or injury as a result of a collision is preventable and we must all work towards reaching the reality of zero road deaths. While this is the most significant risk, the risks don't stop there. On a practical level, road collisions must also be prevented to ensure the efficiency and sustainability of transport systems.

The road infrastructure itself can be a risk. Road design and maintenance can impact driving significantly. Poorly designed roads, inadequate signage and lack of proper lighting can increase the risk of accidents. For example, roads with sharp turns, poorly maintained surfaces or inadequate drainage systems can lead to dangerous driving conditions.

The impact to business

Road traffic collisions and vehicle damage from infrastructure don't only risk injury and fatalities but on a practical level disruption and downtime for businesses.

AA data shows that for an average delivery fleet, the cost per hour to the business for downtime could be as much as £600-£800. Therefore, poor road infrastructure, including congestion, pothole black spots and inadequate maintenance, has a significant impact on businesses. Traffic congestion leads to delays in the transportation of goods and services, resulting in increased operational costs, longer delivery times and reduced productivity. Poorly maintained roads cause vehicle damage, escalating repair costs and decrease the lifespan of commercial fleets. Moreover, frequent disruptions, quick fixes vs long-term strategies for road maintenance and unsafe roads can deter customers, reduce foot traffic, and even impact employee attendance.

Potholes are one example. In September 2024, more than 50,000 pothole-related incidents were reported to The AA, the highest September figure in seven years. In 2023, The AA dealt with 631,852 pothole-related incidents, the highest for five years. Potholes are costing £14.4bn a year in economic damage in England alone. Through our work with the Pothole Partnership, which we established to address this chronic issue, we've advocated for increased pothole funding and raised our concerns with government ministers and the chancellor directly – and we won't stop until we see change.



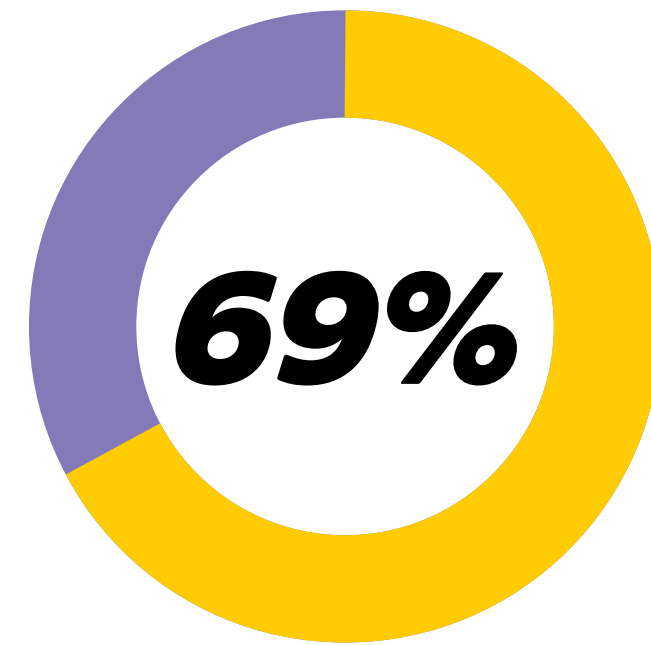
...in the UK, someone is killed or seriously injured on the roads

Our road networks and road safety

Five people die every day on the road in the UK and 80 are seriously injured, according to road safety charity Brake.

And a staggering third of road deaths involve someone driving for work (UCL and Agilysis). It's critical risk on the road is a priority for all drivers and businesses to make zero road deaths a reality.

The condition, quality and type of road plays a pivotal role in how safe it is. Let's consider road type. The UK road network spans approximately 246,000 miles, with roads divided into several categories based on their function and usage, including motorways, A-roads, B-roads and C and unclassified roads. This latter group accounts for more than half of the UK's total road mileage (around 130,000 miles), primarily serving rural areas. It's these roads that pose the most risk per mile – they can be less well-maintained, narrow in width, subject to poor visibility and have inadequate signage and lower levels of traffic management.



...of fatal car crashes for young drivers take place on rural roads

According to Brake, more than half of fatal crashes in Britain occur on rural roads. Per mile travelled, rural roads are the most dangerous roads for all kinds of road user. Research from the AA Charitable Trust shows almost 69% of fatal car crashes for young drivers take place on rural roads. These figures are a stark reminder of how important it is to adapt driving to different road types.



Our road networks and road safety *(continued)*



Mitigating risk: driver training

It's imperative drivers understand, feel confident on and are able to adapt to different road types, from rural roads, through to smart motorways. One of the key ways to do this is through driver training, used as a proactive risk management tool to prevent incidents. Drivetech, The AA's driver training arm, uses a range of methods to deliver effective training to drivers, including e-learning modules, workshops and on-road sessions.

Importantly, driver training should form part of an organisation's overall risk management strategy and therefore be maintained year-round. It's vital drivers are provided with opportunities to refresh skills and receive updates on regulations and new vehicle technologies, such as EVs. An innovative way to support this is with short videos, such as Drivetech's EV Co-Driver, a series of simple to digest clips designed to help fleets and their drivers to transition to EVs. These can be watched from most devices to help drivers with best practice handling tips for EVs.

Campaigning for safer roads

At the heart of what we do at The AA is giving confidence to drivers that they're supported at every stage of their journey and central to this is campaigning for safer roads. We pride ourselves on giving all drivers a voice and use our platform to canvas driver opinion through our regular driver polls and wider research, and lobby government and industry bodies on topics of importance. We're proud to say The AA was at the forefront of the campaign to scrap the building of new smart motorways. Abolishing smart motorways is a major plank of the AA's Motoring Manifesto and is supported by 81% of drivers. While success was achieved in 2023 when the government committed to not building new planned smart motorways, we continue to urge political parties to focus on the existing motorways of this nature to increase safety on our roads. Potholes is another example of our ongoing work and in our Motoring Manifesto, 'Creating Confidence for Drivers', we have section dedicated to safer roads. Our commitment to reducing road risk is as strong as ever and we'll continue to represent drivers and work towards making zero road deaths a reality.

UK roads: the accident management picture

With increasing traffic volumes, rising economic pressures, and the ongoing expansion of urban infrastructure, road quality and effective accident management are top priorities for many businesses. Poor road conditions lead to higher accident rates, increased vehicle damage, and increased costs for individuals and businesses alike. Let's explore how road quality impacts accident rates.

Increased vehicle damage

Uneven surfaces, potholes, and road debris can cause serious damage to tyres, suspension systems, and alignment. Potholes exert sudden and extreme pressure on tyres, increasing the likelihood of punctures, blowouts, and wheel misalignment. In 2023, The AA responded to over 630,000 pothole related incidents – the highest in five years. We're aware that repairing pothole related damage is costing drivers thousands UK-wide – that's why we've made fixing them a focus of our campaigning efforts.

Higher accident rates.

Studies have shown that roads with degraded surfaces are more prone to accidents. Poor road quality forces drivers to make rapid manoeuvres, leading to a higher risk of collisions. For businesses that rely on efficient transport, these accidents lead to delays, increased insurance premiums, and compromised safety records.

Increased fuel consumption and emissions

Poor road conditions cause vehicles to consume more fuel due to the added resistance encountered on uneven surfaces. The increase in fuel consumption not only impacts business costs but also contributes to higher emissions, challenging sustainability goals in transport and logistics.



Tips for navigating poor quality roads

Navigating poor quality roads, whether they're filled with potholes, uneven surfaces or suffer from inadequate signage, presents a significant challenge for drivers across the UK. While road maintenance and infrastructure improvements are crucial for long-term safety, individual drivers must also adopt strategies to stay safe on roads that may not be in the best condition. Here's how this can be done:

Stay alert and reduce speed – when driving on poor-quality roads, remain vigilant and adjust your speed according to the conditions. Potholes, for example, can be hard to spot, particularly in the rain, and driving too fast increases the risk of an accident. Driving at lower speeds increases the ability to detect problems and gives you a chance to react to them.

Be aware of potholes – as we've already pointed out, potholes are a common hazard on UK roads. Driving at lower speeds can help mitigate risk here. You can also watch for road markings, surface discolouration or dips that may indicate the presence of potholes. Remember, if you do spot a pothole ahead don't swerve abruptly as this could lead to impact with other road users. Slow down safely and drive around if safe to do so.

Check tyres regularly – tyres are a vulnerable part of a vehicle when driving on poor quality roads. To give yourself the best chance of avoiding damage, regularly check your tyre pressure is correct, along with tread depth and the overall quality of your tyres.

Maintain a safe driving distance – to give yourself and others on the road time to react to potential risks, always leave a safe distance between you and the car in front.

Better breakdowns

In the event you do suffer a breakdown, it's important to have the right cover in place to get the support you need to get you back on the road quickly and minimise downtime and business disruption. As the transition to alternative fuels accelerates, it's important this is with a provider that gives you the confidence that you're supported whatever your fuel type. At The AA, we're the UK's leading provider of EV support services. Today, over 90% of our patrols are trained to a Level 2 EV capability – the level which facilitates safe work around high voltage systems at the roadside.

Importantly, choose a provider that continues to innovate. From the tools it can use to help you get on with your journey quicker, through to solutions to make your driving life simpler. At The AA, last year we launched AA Mobile Mechanics, a new on-demand product that enables drivers to have their vehicles serviced without the need to visit a garage. AA Mobile Mechanics are able to carry out manufacturer servicing, as well as full and interim services at a location of the driver's choice. Be it at home or at work, AA Mobile Mechanics will help keep vehicles on the road.

An end-to-end solution



In the event you do find yourself in an incident on the road, having a robust accident management solution in place can make all the difference.

Accident management can form a critical preventative and reactive measure that not only helps to look after employees and the fleet but can reduce long-term exposure to the various risks associated with fleet operations.

Dave Bartlett, Head of Accident Management at The AA, explains: “Today, we’re seeing a rise in ‘end-to-end’ incident management solutions. These end-to-end solutions link the various – often disparate – aspects of incident management into a single service. Covering everything from insurance and training to SMR and accident management, end-to-end incident management is designed to keep your vehicles on the road and your organisation moving forward.”

At The AA our award-winning end-to-end accident management solution is already making a key difference to fleets across the UK. It combines our highly regarded fleetservices into a single package, including SMR, breakdown, accident management and insurance services and is supported by driver training through Drivetech. It is successfully helping fleets to:

- ✓ **Control all related costs**
- ✓ **Reduce vehicle downtime**
- ✓ **Minimise business disruption**
- ✓ **Maximise driver productivity**
- ✓ **Protect vehicle resale values through quality assured, guaranteed repairs**
- ✓ **Save time on admin**

Do we have the charging infrastructure to support decarbonisation?

As we transition to alternative fuels to decarbonise our transport, one of the primary debates is around infrastructure and risk and whether we have the charging capability to support the adoption of EVs on a widespread scale.

As part of its commitment to phasing out the sale of new petrol and diesel cars by 2030, the UK is investing heavily in EV charging networks along roads. As it stands, at the end of October 2024, there were 71,459 electric vehicle charging points across the UK, across 36,060 charging locations and 108,633 connectors. This is a 38% year on year increase in charge devices and in addition to the estimated 850,000 charge points installed at home or work where the majority of charging still takes place (Zap-Map).

In a recent white paper, 'Powering Ahead to 2030', ChargeUK stated that a new public charge point is being installed every 25 minutes and that current infrastructure can provide enough power to enable every EV in the UK to drive 580 miles a day. That's 25 times the average daily car journey and further than the distance between London to Aberdeen. Furthermore, if

current growth continues, the rollout of public chargers will track ahead of EV adoption and there will be over 300,000 public charge points in the UK by 2030. Yet the report states that if we are to stay on track for 2030, the new Government must take steps to remove grid, planning and permitting barriers; make owning and charging an EV easy and affordable; and clarify and speed up existing public subsidy schemes.

The right support

Key to the success of the network is the right support for charging infrastructure and the drivers using it. If there's any technical issues with a charge point, drivers need the confidence they can access support to get it fixed so they can continue with their journey. At The AA, we continue to support several of the UK's EV charge point operators (CPOs) with our industry-first support service. This sees our customer service team on hand to speak to customers to fix charge post problems on the spot. At the end of 2023 we were already supporting 40% of all public EV charge points in the UK and this figure is growing.



Looking ahead: the future of road infrastructure

Road infrastructure is constantly evolving and with it the risk factors, as the way we use our roads changes.

With road infrastructure so central to our mobility in the UK, plans to enhance the road network are continuous. These plans include efforts to improve road quality, capacity, sustainability and integrate new technologies, including smart roads, connected systems and digital infrastructure.

National Highways, the company responsible for operating, maintaining, and improving the motorways and major A roads in England is at the forefront of investment in road structure. Its long-term investment plans are shaped by the Road Investment Strategy (RIS), which outlines priorities for road upgrades, maintenance, and new construction projects. Road Investment Strategy 2 covers an investment of £27 billion to improve and maintain over 4,300 miles of the strategic road network. Looking ahead, Road Investment Strategy 3 is likely to include continued investment in sustainable transport options, climate

resilience measures, such as the integration of EV charging infrastructure. In addition to this work on the strategic road network, local authorities are playing a key role in developing urban road networks that support sustainable and integrated transportation systems.

Many cities are implementing or planning to introduce Clean Air Zones (CAZ) in response to air pollution concerns. These impose restrictions or charges on older, more polluting vehicles, while promoting the use of EVs and public transportation. London has expanded its Ultra Low Emission Zone (ULEZ) requiring vehicles to meet stringent emissions standards and Birmingham and Leeds have introduced their own CAZ.

Cities like Manchester and Bristol are developing smart city technologies to integrate transportation networks with digital solutions. This includes deploying sensors, data analytics and digital signage to optimise traffic flow and provide real-time travel information. Investment in mobility hubs that combine EV charging, bike-sharing programs and public transport options are also gaining momentum.



Looking ahead: the future of road infrastructure *(continued)*



The future of road networks in the UK is increasingly intertwined with digital technologies aimed at improving traffic management, road safety and user experience. Future road investment strategies are expected to focus more on connected infrastructure, where roads will be integrated with digital technologies such as vehicle-to-infrastructure communications. The first stretch of inductive-charging road in North America debuted in Detroit in 2023. Electreon, the company behind the technology, is piloting wireless charging technology at select locations across Europe, Asia and America.

In the UK, the government has been investing in innovation that will connect with vehicles on our national highways. The Digital Roads programme will harness data, technology, and connectivity to improve the way the Strategic Road Network (SRN) is designed, built, operated, and used. This will enable safer journeys, faster delivery, and an enhanced customer experience for all.

Furthermore, the development of autonomous vehicles will require significant investment in roads to handle these new technologies. Investment is being made into driverless car lanes and sensor-equipped roads that communicate with autonomous vehicles to ensure safe, efficient and coordinated travel. The UK government's Automated and Electric Vehicles Bill sets out regulations to support this shift.

With the threat of more frequent extreme weather events, there's an increased focus on making roads more resilient to flooding, temperature extremes and other climate related stresses. National Highways has begun to integrate climate resilience into road planning, focusing on areas such as drainage improvements and the use of more durable materials in road construction.

With changes to infrastructure may come changes with how pay for our roads. The government is exploring the concept of road pricing in the UK, as a replacement to vehicle tax. We're seeing this go ahead in some cases, with congestion charges and low emission zones but we may see this on a wider scale for all roads.

Conclusion

When it comes to managing risk on our roads, proactivity, agility and collaboration are key. It's imperative to plan ahead and mitigate risk through strategically assessing your business profile and putting in place measures to avoid risk and manage any incidents effectively as and when they occur.

If you're able to be agile in your approach, ready to adapt to evolving circumstances, your risk management strategy will be more robust and you'll be able to utilise opportunities for streamlining and cost savings as they occur. Alongside this, collaboration with the right partners will enable you to benefit from support where you need it most, harnessing the expertise of those at the top of their game in their field.

At The AA, we're proud to be that partner to drivers and businesses. Everything we do is to give confidence and support to drivers now and for the future. We'll continue to innovate to ensure all elements of driving are as straightforward as possible and help businesses mitigate risk to increase safety and uptime. From the launch of our mobile mechanics service to our support for charge post operators, remote diagnostics, driver training, end-to-end accident management solution and more, we're making a real difference to how fleets operate.

We'll also never stop advocating for drivers on the journey ahead to help reduce risk. Continuing to give them a voice and lobby government and stakeholders to enact change where it's needed.

We're Always Ahead and always by your side.

James Starling
Director of AA Business Services



AA *Always
Ahead*