THE UK MOTORIST SURVEY

The comprehensive
monthly motorist survey

Established in 1972

1970s

Established

- 'Motoring Omnibus' launched
- Focus on motoring breakdown
- The AA was the founding client

1980s 1990s

Expanded

- Introduced car servicing and maintenance
- Quadrupled number of clients

2000s 2010s

Developed

- Transitioned to hybrid data collection
- Added bespoke modules and further clients

2020

Refreshed

- Focus on hot topics and trends
- New, intuitive dashboard
- Flexible pricing structure

Clients over the years

halfords AUTOGLASS RAC KwikFit

AXA Esso Shell AA BP

Talk to us today to find out more.
Contact Ed Mellor, Head of Research Services, on 01622 357060 or edwardm@lake-research.com
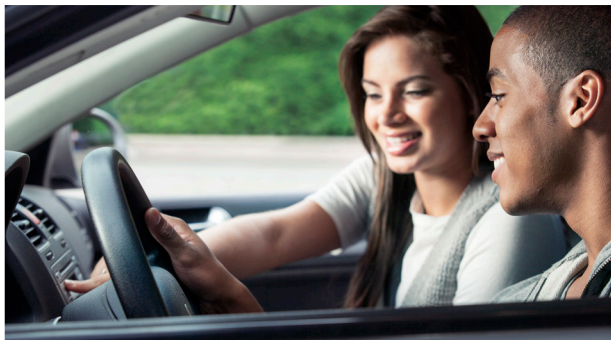
Relaunched for 2020

Covering core sectors

- Motor breakdown
- Car insurance
- Car servicing and maintenance
- Plus hot topics and industry trends

Delivering key metrics

- Track market-level changes
- Monitor competitor performance
- Assess attitudes to sector trends

Regular and robust

- Reported monthly for ongoing tracking
- Reliable sample of 1,000 motorists
- Explore data by demographic splits

Online dashboard access

- 'At a glance' visualisation of results
- Intuitive navigation and download functions
- Access to raw data for data mining

Explore market dynamics

Industry trends

Consumer attitudes around general motoring trends, e.g. autonomous driving, online car purchase, shift to NOwnership / 'all-in' pay monthly packages. Additionally, in the context of insurance (e.g. pay by mile), breakdown (e.g. self- diagnosis) and servicing (e.g. shift to 'do-it-for-me').

Hot topics

Consumer attitudes and behaviour around hot topics, e.g. Smart Motorways, early petrol / diesel car ban, car sharing, car clubs, ride-hailing apps, etc. Questions will change on a regular basis with client input sought on content.
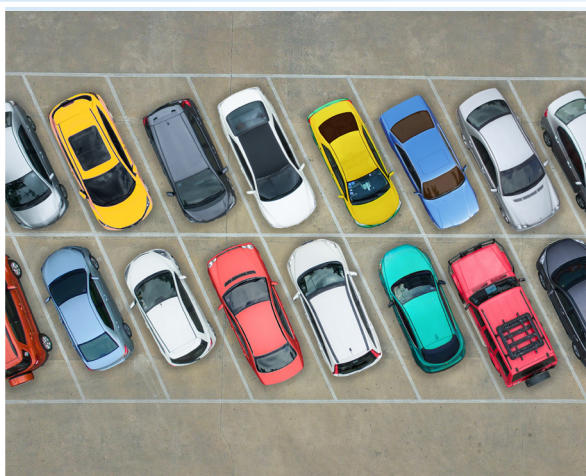
Profiling the UK motorist

Market-level metrics including car ownership type, driver profile and purchase behaviour. Ability to track changes over time and analyse all other data by these motographics and demographics.

Understand key sectors

Breakdown

Market penetration and brand usage movements, customer profiling, preference, satisfaction and loyalty. Service level comparisons. Attitudes towards and uptake of new technologies.

Insurance

Brand usage split by retention, renewals and new to market plus granular level brand switch to and from data. Overall satisfaction, level of complaints / issue resolution and loyalty measures.

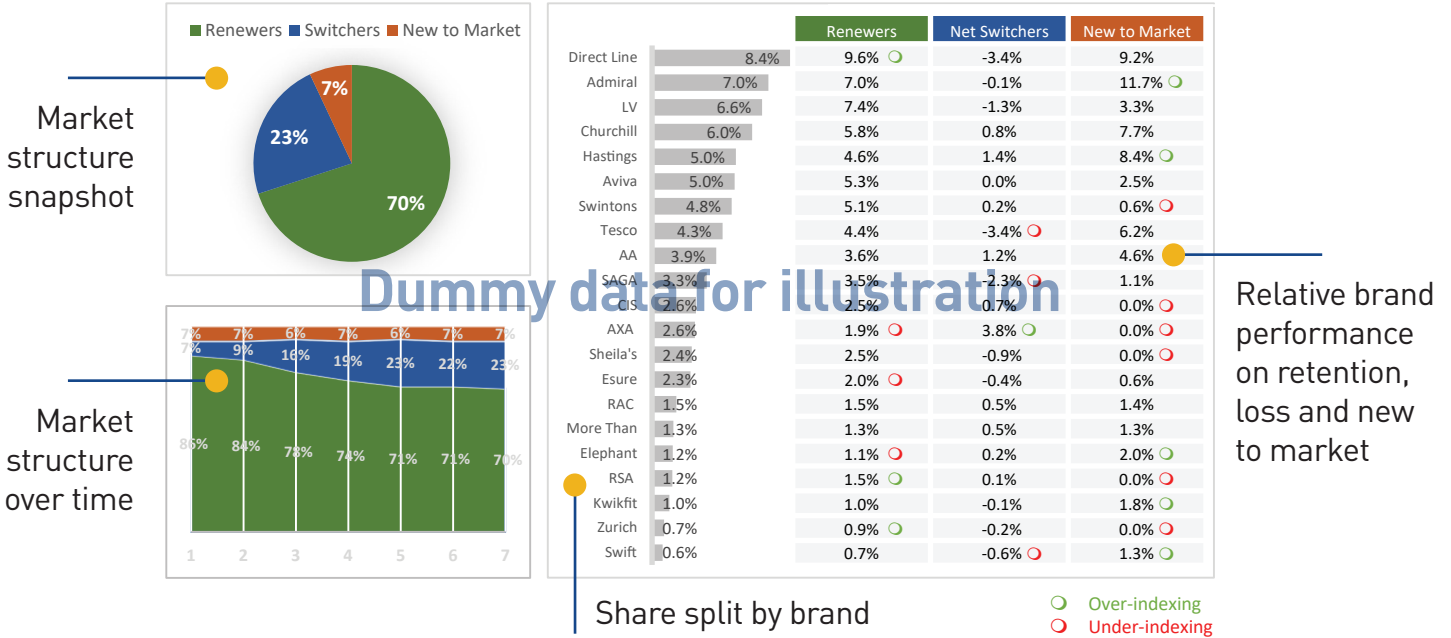
Servicing and Maintenance

Frequency, channel choice and spend on specific servicing and maintenance elements. Tracking of satisfaction and loyalty levels by channel identifying market movements and opportunities.

Information to drive action

Car Insurance: Retention, net switcher and new to market snapshot and sector movements

Market structure snapshot

■ Renewers ■ Switchers ■ New to Market

Pie chart: 70% Renewers, 23% Switchers, 7% New to Market

Dummy data for illustration

Market structure over time

Stacked area chart over periods 1–7:
- New to Market: 7%, 7%, 6%, 7%, 6%, 7%, 7%
- Switchers: 7%, 9%, 16%, 19%, 23%, 22%, 23%
- Renewers: 86%, 84%, 78%, 74%, 71%, 71%, 70%

Share split by brand

		Renewers	Net Switchers	New to Market
Direct Line	8.4%	9.6% ○	-3.4%	9.2%
Admiral	7.0%	7.0%	-0.1%	11.7% ○
LV	6.6%	7.4%	-1.3%	3.3%
Churchill	6.0%	5.8%	0.8%	7.7%
Hastings	5.0%	4.6%	1.4%	8.4% ○
Aviva	5.0%	5.3%	0.0%	2.5%
Swintons	4.8%	5.1%	0.2%	0.6% ○
Tesco	4.3%	4.4%	-3.4% ○	6.2%
AA	3.9%	3.6%	1.2%	4.6% ○
SAGA	3.3%	3.5%	-2.3% ○	1.1%
CIS	2.6%	2.5%	0.7%	0.0% ○
AXA	2.6%	1.9% ○	3.8% ○	0.0% ○
Sheila's	2.4%	2.5%	-0.9%	0.0% ○
Esure	2.3%	2.0% ○	-0.4%	0.6%
RAC	1.5%	1.5%	0.5%	1.4%
More Than	1.3%	1.3%	0.5%	1.3%
Elephant	1.2%	1.1% ○	0.2%	2.0% ○
RSA	1.2%	1.5% ○	0.1%	0.0% ○
Kwikfit	1.0%	1.0%	-0.1%	1.8% ○
Zurich	0.7%	0.9% ○	-0.2%	0.0% ○
Swift	0.6%	0.7%	-0.6% ○	1.3% ○

Relative brand performance on retention, loss and new to market

○ Over-indexing
○ Under-indexing

Accessible whenever you need it

Information and data available on the dedicated Motoring Monitor dashboard

- Connect via the online portal or mobile

- Simple and intuitive visualisation

- Full chart and data download functionality

- 24/7 secure login controls

- Multiple user access rights

Example survey content

Motorist Profiling: Demographics covering main car make, model, body type, engine size, engine type, year first registered, new or second-hand when acquired, how owned, where purchased, annual mileage, vehicle age, length of ownership and number of vehicles in household. Plus, when likely to replace, new or used, engine type, from where, how. Demographics including age, gender, region, social class, marital status and household composition.

Breakdown: Penetration of cover (by membership type / level), reasons for non-cover, brand gains / losses through retention, renewals and new to market, how bought, why bought, use of comparison website, past brand switch to / from, reasons for switching, future intentions, no. of claims, resolution effectiveness, NPS, brand most likely to recommend, awareness / use of digital and social media for purchase and contact interactions, attitudes to latest sector technologies.


Car Insurance: Brand awareness / consideration / preference, brand gains / losses through retention, renewals and new to market, brand switch to / from, reasons for switching, channel purchased, how purchased, future channel purchase (including digital / social media interaction), trust of comparison websites, use of cashback website, cost of cover / monthly or annual / excess, type of cover / additional options chosen, single / multi-car, when last claimed, satisfaction with claim experience, years no-claims bonus, NPS, brand most likely to recommend.

Servicing and Maintenance: Frequency of servicing in last year, channel consideration, preference, usage, brand gains / losses, satisfaction, spend. Equivalent for maintenance. Warranty ownership and renewal, trust and loyalty measures, awareness / use of digital and social media for purchase and contact interactions.

Hot Topics: Bespoke section with questions tracked for between one and three months. Topics to be based on pertinent issues to the sector, e.g. Smart Motorways, early petrol / diesel car ban, car sharing, car clubs, Govt policy changes.

Industry Trends: Ongoing tracking of trends impacting the industry. Awareness, attitudes and (where appropriate) usage of products, services and innovations, e.g. self-driving, online new and used car purchase. Trends included for specific sectors, e.g. pay by mile insurance, self-diagnosis for breakdown and shift to 'do-it-for-me' for servicing and maintenance.
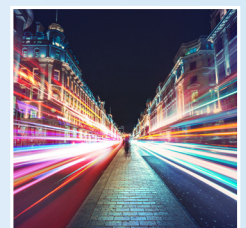
Modular Pricing & Discounts

Rate card Prices

Module Pricing*	Price	#Questions
Sector (breakdown, insurance or servicing)	£400 each	c. 15 per module
Key Issues (hot topics or industry trends)	£500 each	c. 10 per module

*Motorist profiling data (c. 20 questions) included with each module.

Example Year One Monthly Pricing

Module(s)	Total	Discount	Price**
Breakdown	£400	0%	£400
Breakdown, insurance	£800	10%	£720
Breakdown, insurance, trends	£1,300	20%	£1,040
Breakdown, insurance, servicing, trends	£1,700	30%	£1,190
Breakdown, insurance, servicing, hot topics, trends	£2,200	40%	£1,320

** Year 1 'package' discount.

Pricing Notes:

- Monthly costs are based on an annual subscription

- Costs are in GBP (£) and are exclusive of VAT

- Ad-hoc question requests and custom reporting needs can be discussed separately