

A Portrait of Motoring Britain

Five Years of The AA/Populus
Motoring Panel

Populus
RESEARCH | STRATEGY



Methodology

A Portrait of Motoring Britain has been developed to celebrate five years of the AA/Populus Motoring Panel.

The segmentation was produced following analysis of an AA/Populus Panel survey of 21,874 AA members conducted between 15th and 26th March 2013.

Populus is a founding member of the British Polling Council and abides by the Code of Conduct of the Market Research Society of Great Britain.

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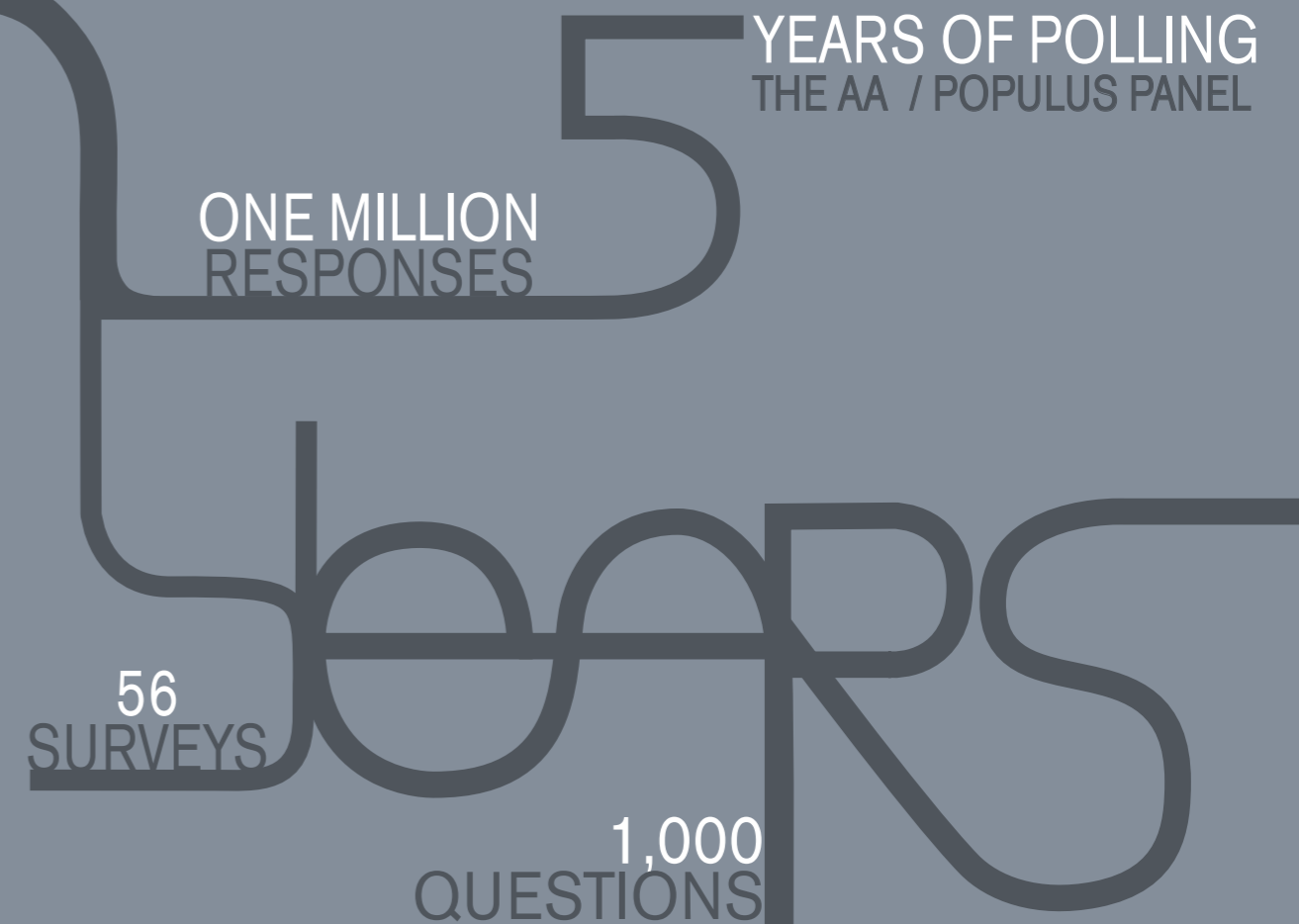
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Understanding Motoring Britain

Edmund King, President, The AA



When the AA was formed by a group of motoring enthusiasts in 1905 its aim was to protect the interests of pioneer motorists. From installing road signs on the UK's first arterial roads to taking a stand against police speed traps in the early years, the AA has championed the cause of motorists from the very beginning.

It is a challenge that still inspires us today. The AA/Populus Motoring Panel - established in 2008 - plays a crucial role in helping us to rise to it.

Every month we get survey responses from around **20,000** AA members, providing us with critical insights into the issues affecting motorists.

From speed cameras and drink driving, to fuel prices and congestion, the surveys cover a wide range of topics. Every response we get forms a picture of what motorists are thinking, helping us to voice concerns and issues faced by drivers to government, local authorities and the media.

The Panel has proved to be a valuable resource in support of our campaigning and lobbying work. Over the past five years the ideas and priorities identified by respondents have been integral to informing a series of the AA's most successful campaigns, including our campaign for an extra £300m to fix potholes, our work to stop fuel duty rises, and our efforts to encourage government to take a stand against cowboy clamping.

The success of these campaigns is irrefutable: in 2011 alone the AA's campaigning activities saved UK drivers an estimated £1 billion. We could not have achieved these results without the support and input of our members. The AA/Populus Motoring Panel has been an invaluable part of this process.

However, we never stop listening to and learning from our members. And this year to mark the **5 year anniversary** of the Motoring Panel, our friends at Populus have produced a new piece of work that gives us an even greater insight into the nature of the Great British motorists.

By grouping members of the panel according to their attitudes towards driving, Populus has been able to identify six distinct categories of motorist, giving us a much greater insight into what unites and divides them and what the underlying drivers of their opinions are. This provides us with a much more nuanced understanding of our members and helps us to understand how to serve them better.

We never underestimate the importance of engaging with our members, which is why the AA/Populus Motoring Panel is so central to our work. It's also why we are so proud that **180,000 members** having signed up to take part since 2008, making it the largest dedicated motoring opinion panel in Europe. And it's why I am so delighted that we now have this new piece of work to help us understand our members and their priorities still further.

This commitment to understanding and championing the interests of motorists has been integral to the AA's DNA since day one, and I am pleased to be able to carry it forward as we face up to a new set of challenges in the months and years ahead.

Introducing A Portrait of Motoring Britain

Rick Nye, Managing Director (Politics & Reputation), Populus



Five years ago the AA came to Populus with a question: how could they do more to make use of the data they held about their members?

We knew that the organisation was sitting on a vast reservoir of data, and we knew too that the AA has a proud tradition of representing the views of the Great British Motorist in important policy debates. It was from this understanding that the AA/Motoring Panel was born.

Over the past five years the panel has helped the AA to understand its members' opinions like never before. This understanding has allowed the organisation to strengthen its position as the champion of motorists – influencing national debate and putting motorists' views at the heart of the policy making process.

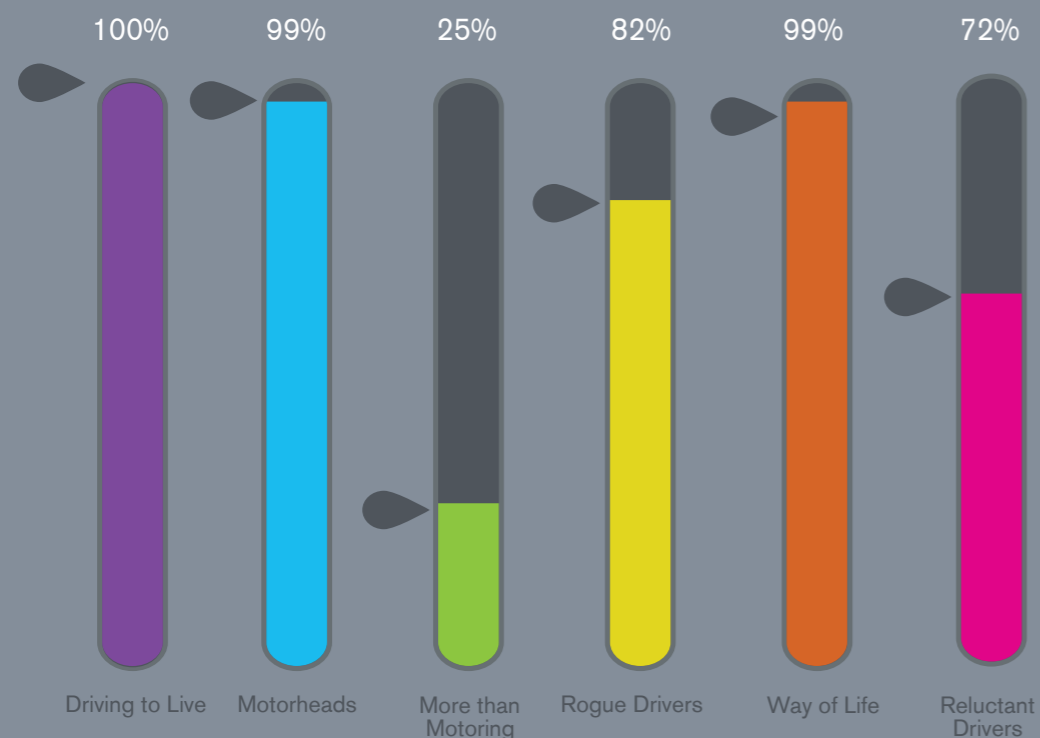
The success the AA/Populus Panel has experienced is a testament to the AA and, of course, to its members who respond to the surveys every month.

After five years of listening to their views on everything from toll roads and petrol prices to their favourite driving music and wheel clamping, there is one thing we know for certain: motorists are not a homogenous group – on any given subject there will be diverse, and often contrasting, opinions. That is why to mark the fifth anniversary of the AA/Populus panel we have conducted advanced analysis to identify what the attitudes and behaviours are which define the country's different motoring tribes.

We have divided up AA members according to their driving habits, the type and frequency of car use and their attitudes towards government policy, the laws of the road, the environment and car maintenance. What our analysis has revealed is that six distinct groups of motorists are on our roads (see overleaf). What is unique in this analysis is what unites the drivers in the different groups: not their gender, age, the region they live in or the colour of their car, but common attitudes towards motoring and shared driving behaviours.

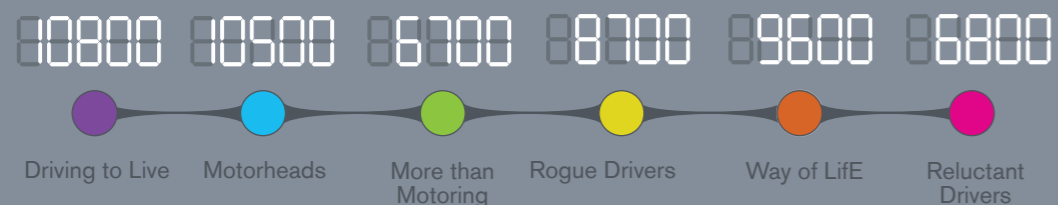


Drive most days or more frequently



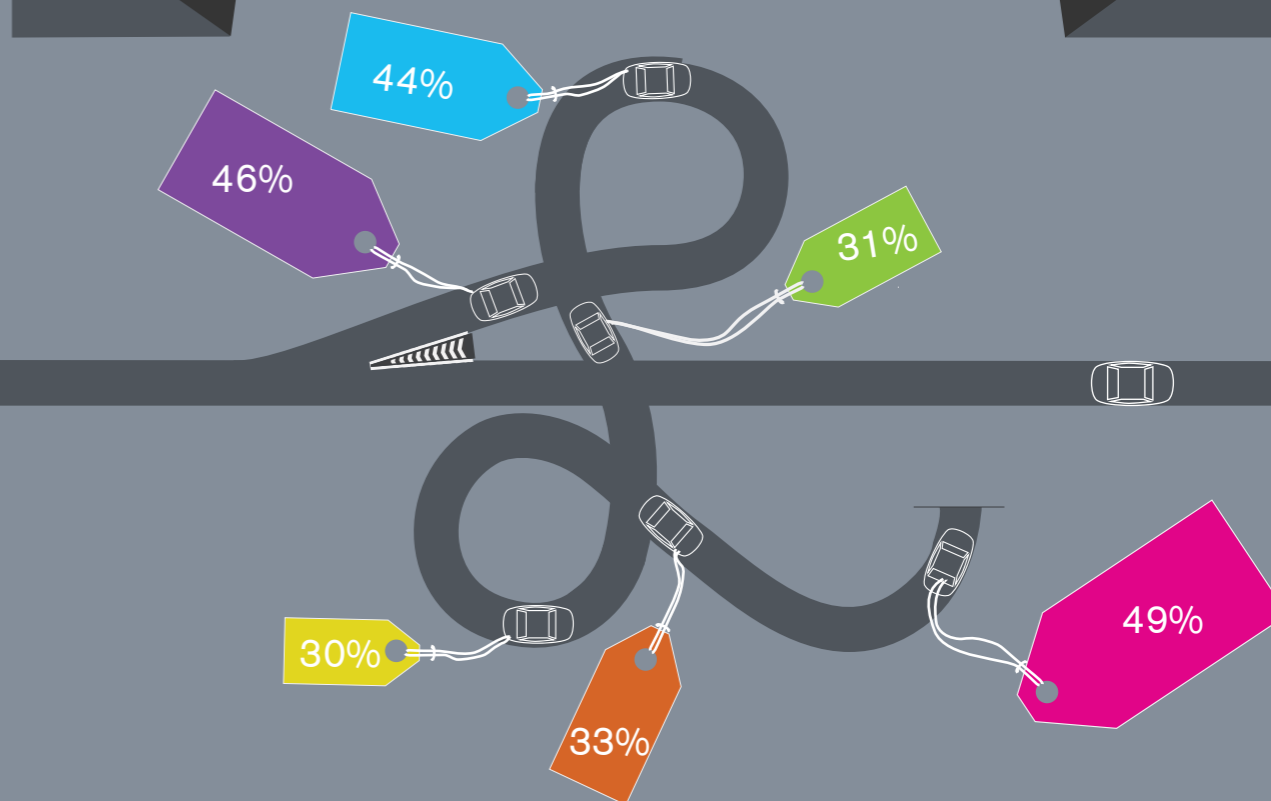
The groups divide upon a number of cleavages. The first distinguishing feature is the amount of time spent driving: **'Driving to Live'** cover more miles per year than any group, using their car to commute and often for work, whereas **'More than Motoring'** and **'Reluctant Drivers'** spend as little time as possible on the road; the former due to environmental concerns and the latter because of a lack of confidence behind the wheel.

Average number of miles per year



On driving behaviour the results are more surprising. **'Motorheads'**, who live and breathe motoring, are the most courteous and calm of all drivers, not prone to flashing their lights or honking their horn at other drivers like **'Driving to Live'** or bending the rules of the road like **'Rogue Drivers'**.

Struggle to continue driving given the cost of motoring

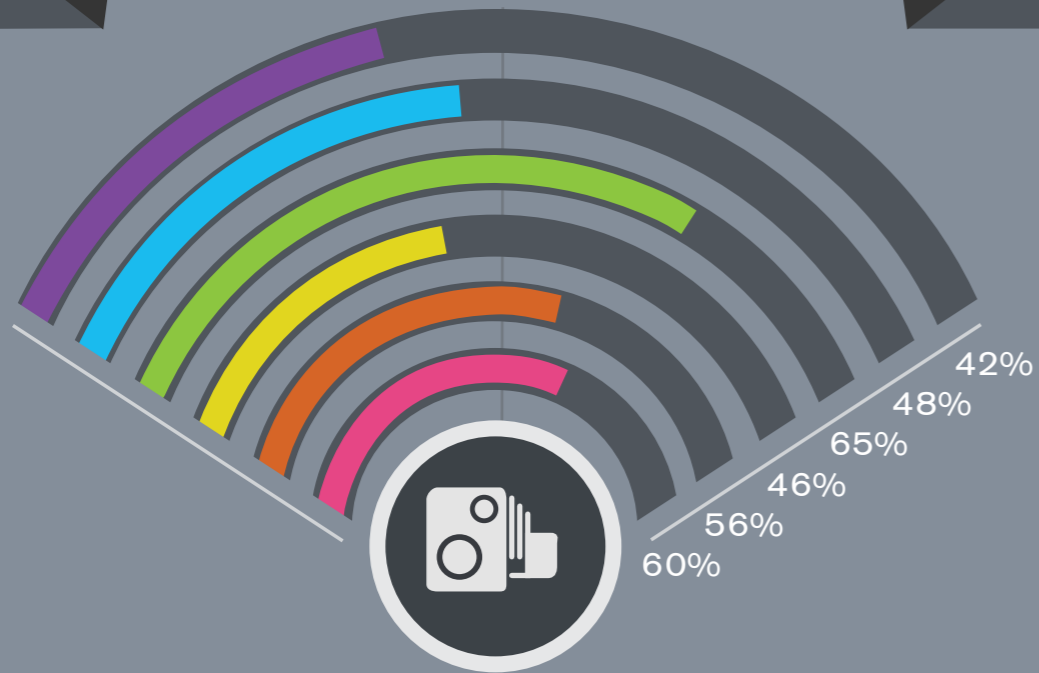


The role the car plays in daily life further divides the groups. For **'Driving to Live'** being behind the wheel is essential to earning a living. For **'Way of Life'** driving is equally important, but they use their car for socialising, shopping and taking day trips rather than for work. **'Reluctant Drivers'** spend as little time as possible behind the wheel, only driving when it's absolutely necessary, whether it's the weekly shop or visiting family. For **'More than Motoring'** driving is of least importance: they are unlikely to use their car for work or leisure given their likelihood to live in urban areas and be concerned about the impact driving has on the environment.

On certain issues the groups express similar opinions. At least three-in-ten in each group (rising to half of **'Reluctant Drivers'**) admit that they struggle to continue driving given the costs of motoring. Similarly there is general opposition to the privatisation of the country's roads. **'Reluctant Drivers'** again express the most opposition, fearing that it would increase the cost of motoring even further.

Support for speed cameras varies among the groups: the most frequent drivers, 'Driving to Live', and those most likely to exceed the speed limit, 'Rogue Drivers', oppose them, while a clear majority of 'More than Motoring' and 'Reluctant Drivers' support their use.

Support the use of speed cameras



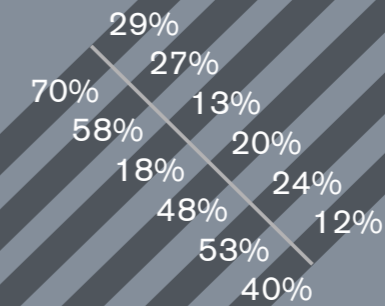
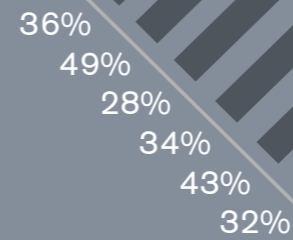
So what does our typology really tell us? Ultimately, that drivers are a diverse group with differing behaviours and needs: there's no silver bullet which will address the concerns and needs of the six groups. The challenge for policy-makers is to meet these divergent demands by creating thoughtful, targeted motoring policy, and, of course, by listening to drivers.

In a time of unparalleled strain on the country's motorists, who face rising motoring costs and busier roads than ever before, we are delighted to have developed this new typology of motorists to help the AA continue to serve its members and to provide a voice for motorists everywhere.

Regularly go for recreational drives



Regularly use my car for business



- Driving to Live
- Motorheads
- More than Motoring
- Rogue Drivers
- Way of Life
- Reluctant Drivers

Regularly commute to work by car



Driving Insight Through Research

Paul Watters, Head of Public Affairs, The AA



Motoring is one issue that nearly everyone has firm views on.

Throughout its history, the AA has been proud to reflect its members' opinions, be it on the challenges that motoring poses to society or the freedom and pleasure it brings.

The daily experience of drivers is shaped by UK, EU and global policy formers, law makers, campaigners and authorities. As such it is crucial that their voices be heard, and opinion research on motoring has been conducted by the AA since the 1960's.

This work is central to the AA's belief that high quality research and opinion sounding should be the foundation for developing policy and campaigning. It has helped shape policy on road building, breathalysers, road tolls, speed limits, seat belts, motoring taxation and much more.

For the past 5 years the AA has been working with Populus to create a successful motoring panel, which has become the largest of its kind in Europe. With around 20,000 poll responses every month we can have confidence that when we make input to policy development and proposals we reflect our motoring panel's attitudes and more widely those of members and motorists in general. The impact of the AA/Populus panel is significant. Ministers, top civil servants, the police and national and local politicians all recognise its power and influence.

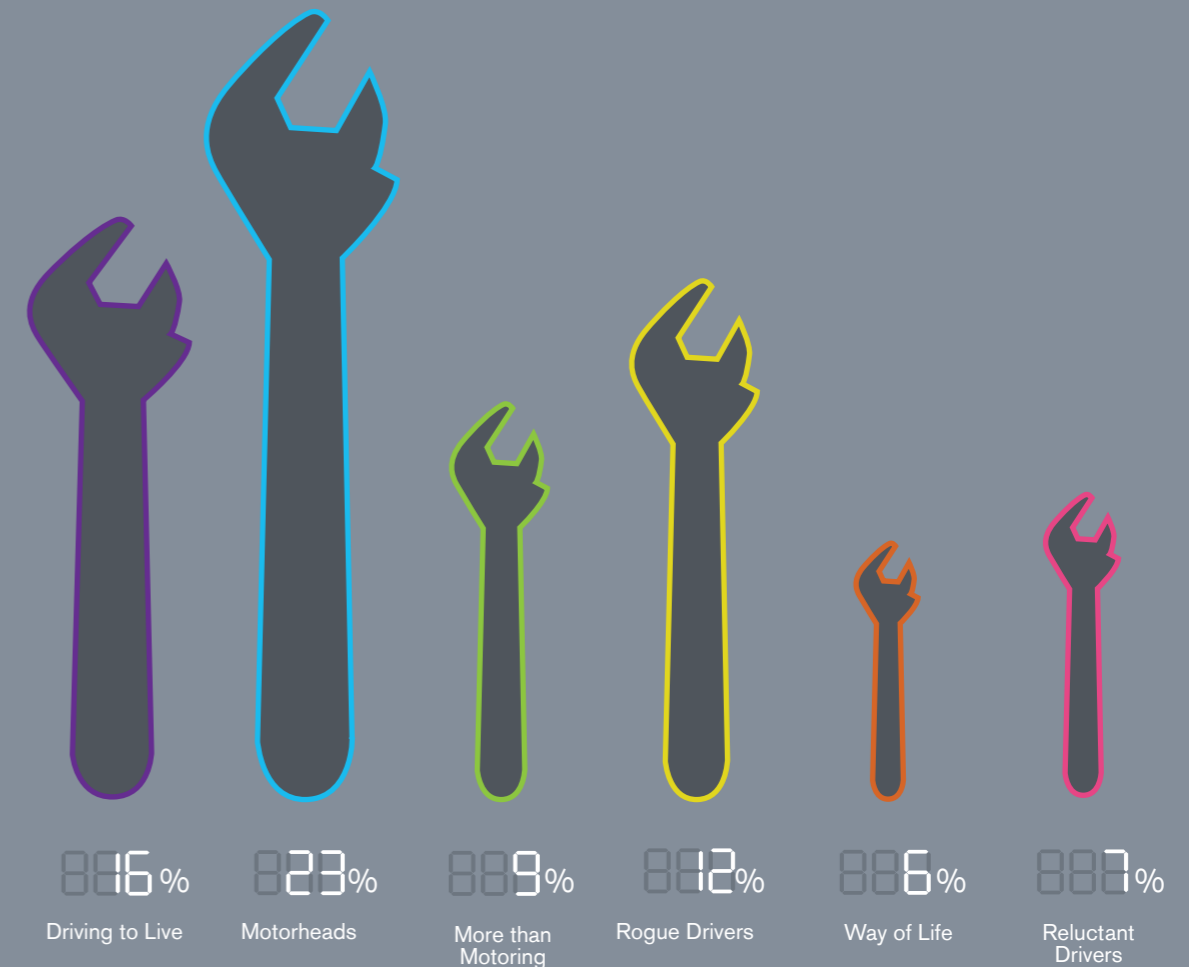
Did you know?

Scotland is the pothole capital of Britain, with 44% of Scottish drivers reporting pothole damage in the past two years

There is no better endorsement than having decision makers seek a slot on the AA/Populus poll to 'test' policy – sometimes with surprising results.

One example has been attitudes to MOT testing. In an effort to reduce motoring burdens the Department for Transport considered relaxing the rules on MOT testing for example, replacing annual testing with biannual check-ups. However, in an AA Populus Poll 94% of respondents agreed the test was important for UK road safety and 50% opposed a change to biannual testing. In February 2012 the government decided to retain the current testing periods.

I do all or most of the maintenance to my car

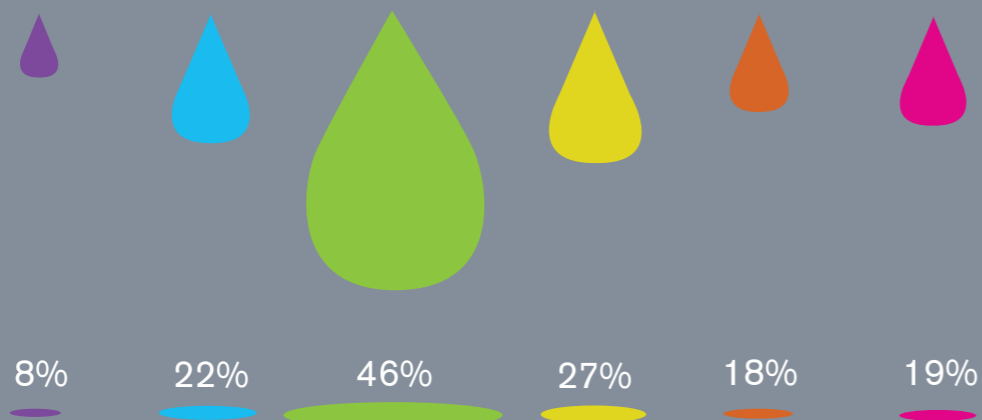


The motoring panel provides the AA with a valuable behavioural and attitudinal barometer. The surveys have regularly been used to benchmark:

- the impact of fuel price surges and particularly how this affects the less well-off
- the acceptability of speed cameras at the roadside
- top motoring concerns
- the importance of motoring issues at election times
- holiday driving plans
- attitudes to road charges on a local and national scale

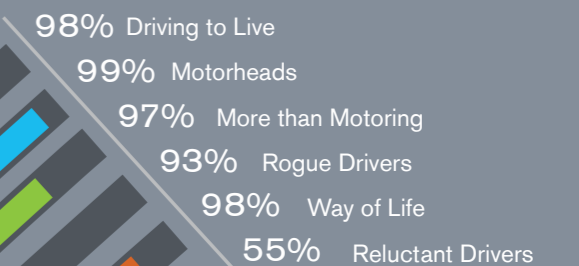
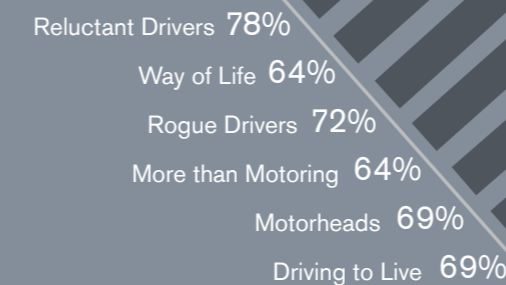
On the issue of rising fuel prices, the responses given by the panel have shown that the behaviour of a large majority of AA members is directly affected by the cost of fuel: most take action by driving less, spending less or both. By being able to drill down to measure the impact on respondents by their socioeconomic grouping, the research conducted by Populus confidently shows a disproportionate impact of high fuel prices on the less well-off. This gives us a powerful message to convey to the Government.

Use alternative forms of transport to limit my carbon footprint



Oppose the privatisation of the UK's roads

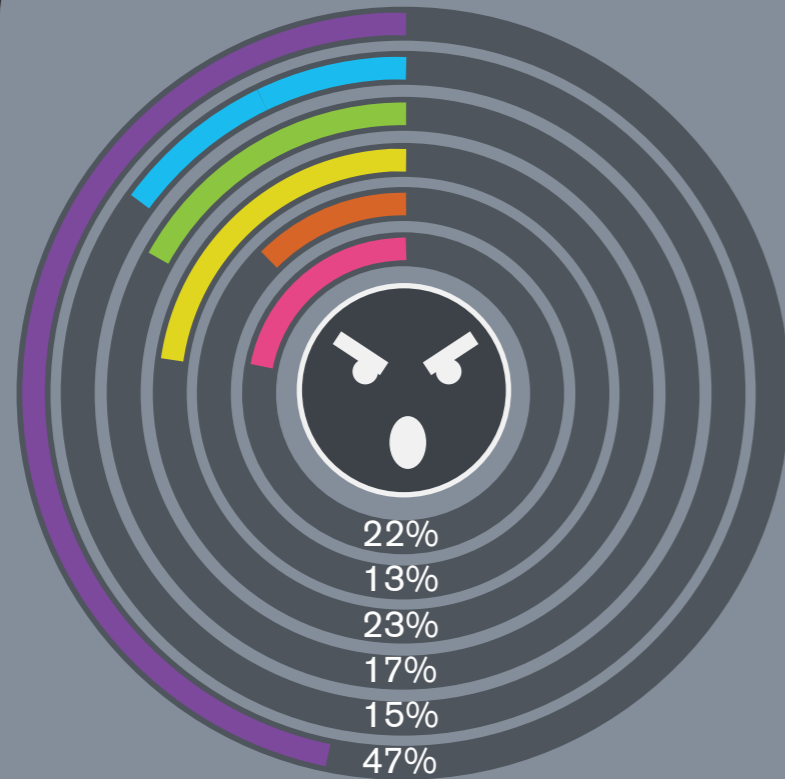
Did you know?
20% of drivers have sent a text while driving. 4% admit to checking their emails while doing so



Comfortable driving on the motorway

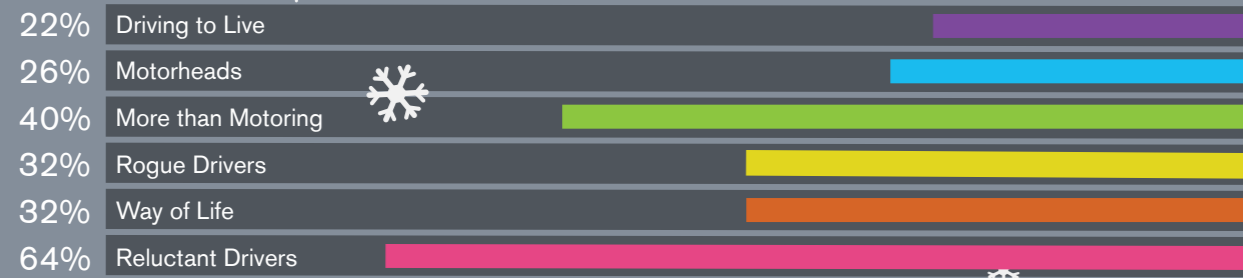
Prone to losing my temper with other drivers

- Driving to Live
- Motorheads
- More than Motoring
- Rogue Drivers
- Way of Life
- Reluctant Drivers

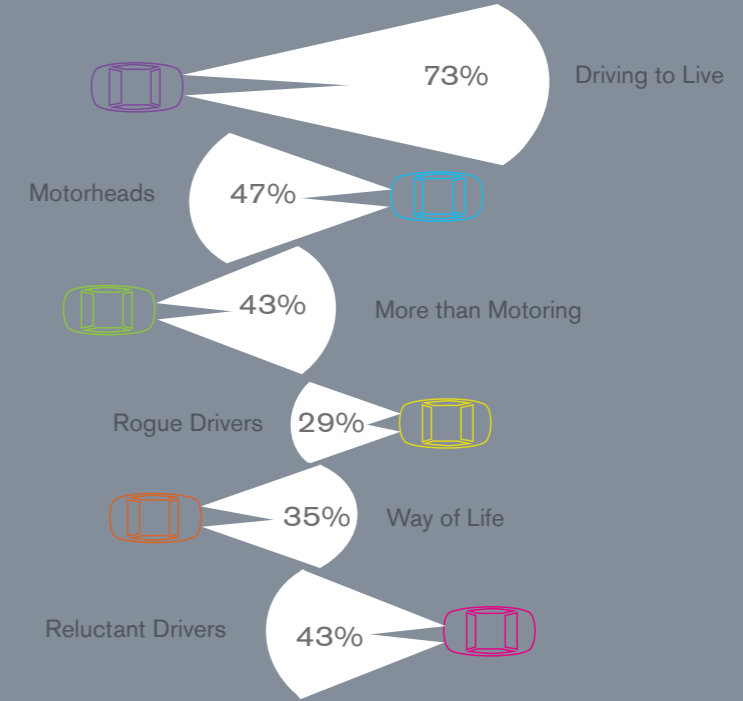


Did you know?
 45% of people say other car drivers are the road users that are most likely to make them feel angry when driving. Just 18% say 'white van man'

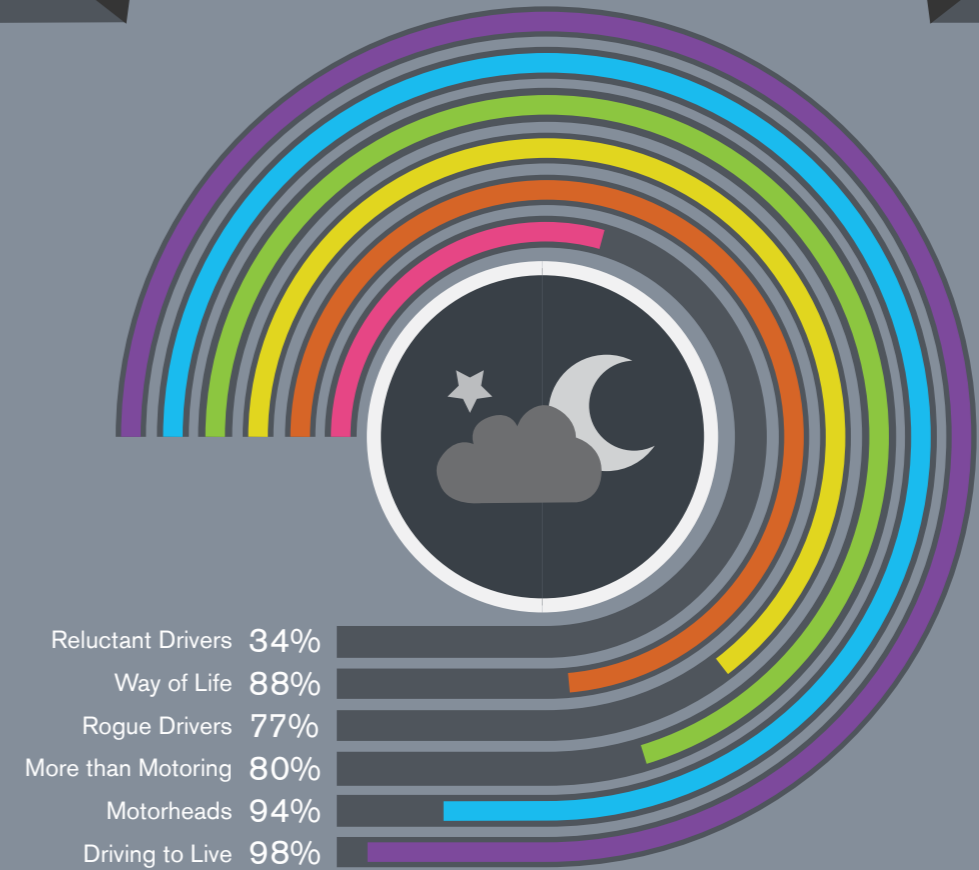
Avoid driving when the weather is bad



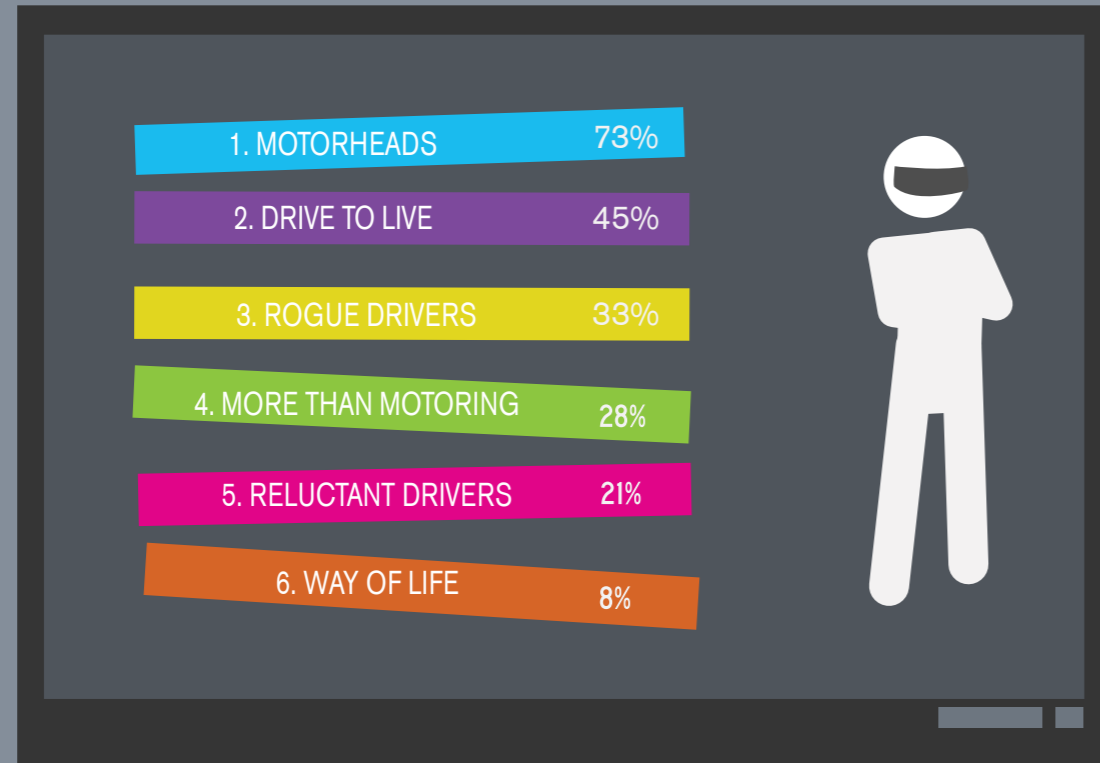
Flash my headlights to communicate with other drivers



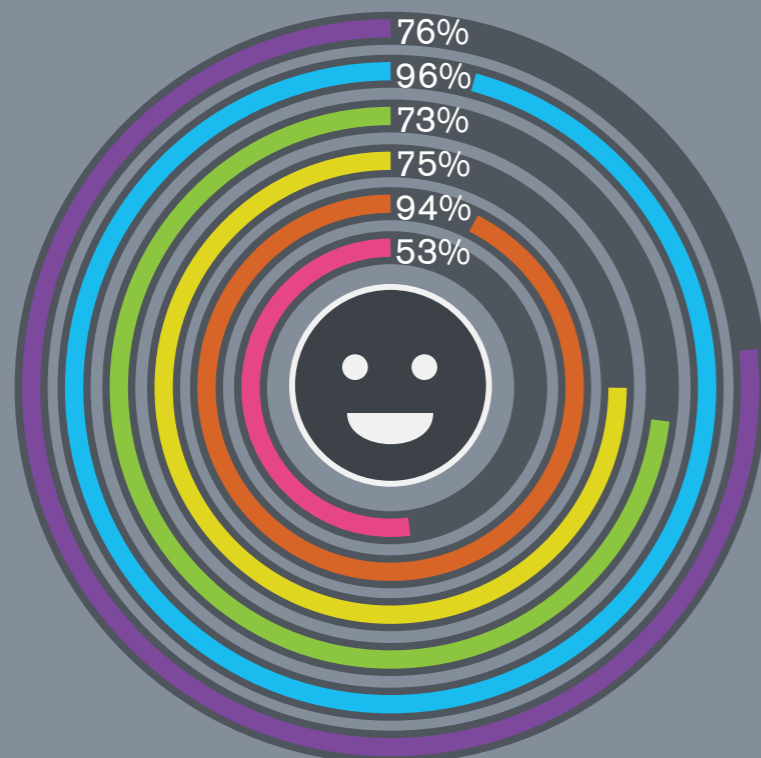
Comfortable driving at night



Enjoy watching motoring themed TV shows



Enjoy driving



- Driving to Live
- Motorheads
- More than Motoring
- Rogue Drivers
- Way of Life
- Reluctant Drivers

The AA

The AA has looked after Britain's motorists for over 100 years and is a leading and expert brand that is trusted and relied on by millions of customers every day.

Today, the AA is in many ways the same motoring organisation that motorists have trusted since 1905. Our millions of members make us by far the largest motoring organisation, with more dedicated patrols than anyone else. The principal difference these days is that we now provide services not only to get you safely from A to B, but also to help organise your finances and even buy a new or second-hand car.

The AA also provides expert knowledge and advice on transport issues, which are respected by AA members, the public, safety experts and the Government.

www.theaa.com

For further information please contact: publicaffairs@theaa.com

Populus

Populus is a leading research & strategy consultancy specialising in political, stakeholder, reputation and market research. We use polling, research, evidence and expertise to provide clients with the critical knowledge they need to make better decisions about their business, organisation or brand.

Our solutions include political and MP polling, omnibus surveys, segmentation and campaign planning, thought leadership studies and reputation and stakeholder research.

Populus is proud to be a founding member of the British Polling Council and to abide by the Code of Conduct of the Market Research Society of Great Britain.

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