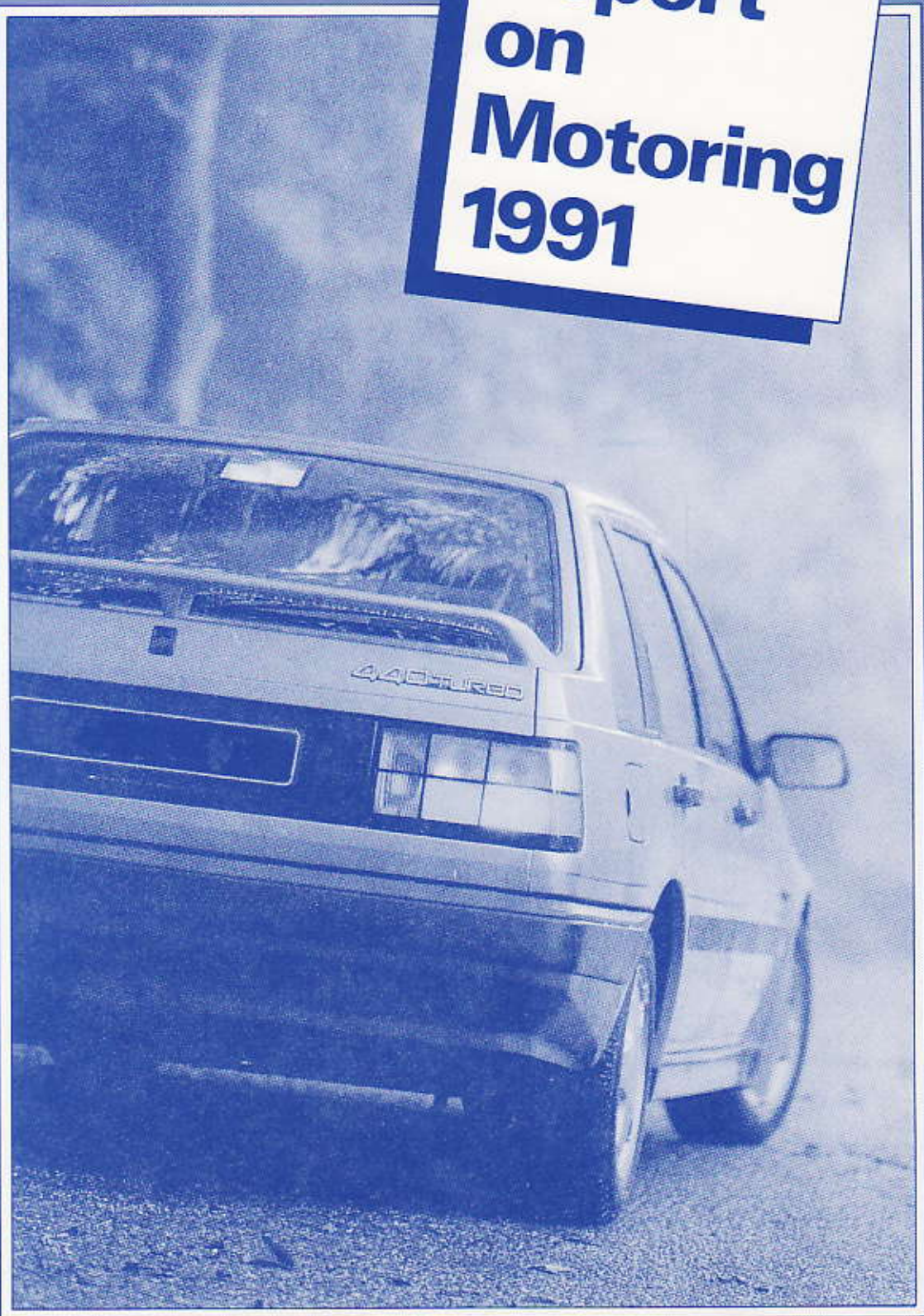


Lex Report on Motoring 1991



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January 1991
Price £150
Lex Service PLC
ISBN 0 9515669 1 1

Lex Service PLC
Lex House
17 Connaught Place
London W2 2EL
071-723 1212

TABLE OF CONTENTS

	Page Number
FOREWORD – Rt Hon Malcolm Rifkind MP, Secretary of State for Transport	5
INTRODUCTION – Sir Trevor Chinn	7
LEX SERVICE AND THE RETAILING OF CARS IN THE UK	9
MOTORING STATISTICS	
Car Ownership in the UK	12
Scrappage of Cars in the UK	14
Registrations of New Cars	15
Registration of New Cars in UK by Manufacturer	16
Cars per 1000 population, 1989	17
SURVEY OF BRITAIN'S CAR DRIVERS	
INTRODUCTION TO THE RESEARCH	21
STATISTICAL PROFILES	
Britain's Car Drivers	22
Profile of Driver Types	24
Britain's Cars	28
DRIVERS' BEHAVIOUR	
Annual Mileage	30
Length of Car Ownership	34
Car Ownership Expectations	36
Grossed up Estimates and Expectations	38
Effects of Economic Climate	40
Company Car Tax	42
Extra Security Features	44
Night-time Parking	46
Use of the Car	48

TABLE OF CONTENTS (CONT'D)

	Page Number
THE DRIVING EXPERIENCE	
How Pleasurable is Driving?	50
Delays due to Congestion	52
Causes of Anxiety	54
Causes of Anger and Stress	56
Problems with Road Signs	60
LAW BREAKING AND TRAFFIC CONTROL	
Penalties for Parking Offences	62
Attitudes Towards Speed Limits	64
Means of Traffic Control	66
TRANSPORT POLICY	
Attitudes to Public Transport	68
Use of Public Transport	70
Reasons for Not Using Public Transport	72
THE ENVIRONMENT AND TRAFFIC CONGESTION	
Environmental Problems	74
Policies on Pollution and Congestion	76
Support for Policies	78
Effectiveness and Support for Policies	80
Road Pricing	82
Effect of Measures to Reduce Congestion	84
Car Sharing	86
Use of Unleaded Petrol	88
CAR PURCHASING	
New versus Second Hand	90
Source of Purchase	92
Source of Finance	94
Considerations in Deciding on Source of Purchase	96
Buying Discount in Europe	100
Money Back Guarantee/Car Exchange	102
Next Car Purchase	104
Car Buying Considerations	106

TABLE OF CONTENTS (CONT'D)

	Page Number
SERVICING	
Servicing the Car	112
Effects of Regular Servicing	114
Satisfaction with Servicing	116
Factors in Deciding Where to Have Car Serviced	118
Checking Servicing	120
THE FUTURE	
Expectations for the Year 2001	122
The Channel Tunnel	124
APPENDIX	
Statistical Reliability and Definitions	126
Summary of the 1989 and 1990 Lex Report on Motoring	128
Sources and acknowledgements	130
LEX SERVICE - A PROFILE	



FOREWORD TO LEX REPORT ON MOTORING 1991

The motor car continues to grow in popularity. Virtually two thirds of all households now have regular use of a car. Motorists do need to exercise discretion and responsibility in the use of their cars, so as to reduce accidents, pollution and congestion.

This Lex Report on Motoring contains information that is very interesting and relevant to this point. I welcome, for instance, the finding that 89 per cent of drivers now favour the use of some form or other of traffic control in residential areas - the most popular being road humps ('sleeping policemen'). Measures such as these greatly reduce accidents in residential areas, where so many of the 300,000 annual casualties occur.

However, I must strongly condemn the attitude which a significant minority of motorists have towards speed limits. It is shocking that 45 per cent apparently believe it acceptable to break the speed limit on motorways and 23 per cent to break the limit in towns. Driving too fast and too close is a major cause of motorway accidents. In towns, the speed of a car can literally make the difference between life and death, for instance when a child runs out into the road. I warn those who are tempted to break the law that we are tightening up on enforcement. The Road Traffic Bill, now being considered by Parliament, will give the police powers to make more effective use of camera technology to detect speeding and red light jumping offences.

I also warmly welcome the finding that most drivers now recognise that environmental problems are very serious. But a general concern for the environment is not enough: it is important that they translate their concern into action, by buying more fuel efficient vehicles and changing their driving habits. That is crucial, because reducing the amount of fuel consumed is the only way to reduce emissions of carbon dioxide, the main contributor to global warming. We all value the advantages the car offers in terms of mobility and comfort, and there is much the motorist can do to contribute to the solution to environmental problems.

I believe that the Lex Report on Motoring contains a great deal of useful information, and I commend the Lex Group for producing this third edition.

MALCOLM RIFKIND



THE MOTORS ACT 1991

1. The purpose of this Act is to provide a framework for the regulation of motor vehicles and to ensure that the safety of the public is protected.

2. The Act applies to all motor vehicles used on roads in Great Britain.

3. The Act provides for the licensing of motor vehicles and the registration of drivers.

4. The Act also provides for the regulation of the construction and use of motor vehicles.

5. The Act is intended to ensure that the safety of the public is protected.

6. The Act is intended to ensure that the safety of the public is protected.

INTRODUCTION

This is the third edition of the Lex Report on Motoring and we have once again based it on the results of a survey specially conducted for us by MORI. We have continued to measure the behaviour of Britain's motorists and their attitudes to a wide range of issues of concern to policy makers, legislators and to all of us involved in the manufacture, distribution and retailing of passenger cars.

Continuing Demand for Cars

Despite the adverse economic climate, the number of cars in Britain has continued to rise, reaching an estimated 23 million at the end of 1990. Britain's drivers have been affected by high interest rates, but they still expect to own nearly two million more cars by 1992. Their dependence on the car remains unchanged – eight million people use their car to travel to work each day, half of whom also use their car for their work, and six million for shopping. Although Britain's drivers infrequently use public transport they do support additional investment in buses and trains, but they also want more expenditure on new roads.

Effects of the Economic Climate

Higher interest rates and the decline in the economy have forced drivers to reduce the miles they drive, keep their cars longer and trade down to slightly smaller cars. They have also switched to cheaper methods of servicing their cars. However, these changes are likely to be temporary and the motor industry has to prepare itself for the return to growth once the economy recovers.

Raising Industry Standards

While overall satisfaction with car retailing and servicing remains high, we must maintain our efforts to raise standards to ensure that the experiences of customers buying a car match the developments in modern retailing. The Lex Report on Motoring is a valuable aid to us in Lex Service in preparing new programmes and assessing the effectiveness of our existing initiatives. By making the Report widely available throughout the industry, we hope to provide a catalyst to accelerate the process of change.

We in Lex Service are committed to giving our customers an outstanding level of service, which they, the customers, will describe as excellent. This report will help us achieve that goal. I hope you find it interesting and useful.



Sir Trevor Chinn, Chairman and Chief Executive, Lex Service PLC

SOME COMMENTS ON THE 1990 LEX REPORT ON MOTORING

"It's a great and informative, wide ranging piece of opinion research and a real credit to Lex in its responsible attitude, not only in just selling vehicles, but also being concerned about how and where they are used"
Robert Atkins MP, then Minister for Roads

"For Lex Service to make the excellent research available to the whole industry is indeed generous. But I do believe there is an underlying commercial interest involved. A realisation that investment in high standards to achieve customer satisfaction is likely to be most profitable if the customer perception of the whole industry is high"
HRH Prince Michael of Kent, President of the Institute of the Motor Industry

"I find this an authoritative and most useful source of reference"
Sir Hal Miller MP, Joint Chairman of the All Party Motor Industry Committee.

LEX SERVICE AND THE RETAILING OF CARS IN THE UK

Applying the results of the research in practice

"I need my car"

We recognise how dependent our customers are on their cars. That is why Lex dealerships can offer courtesy buses to take our customers to and from the station or shops, while-you-wait repairs where possible and extended opening hours. In many cases, we can also make a loan car available for our customers.

"I'm concerned about the environment"

Drivers are becoming more concerned about the environment – six times as many people use unleaded petrol as two years ago and drivers are keen to see catalytic converters fitted to all new cars. The vast majority of new cars supplied by Lex dealerships can use unleaded petrol and we convert cars if they are suitable, in many cases free of charge. Many of the new cars we sell can be supplied with a catalytic converter – all petrol driven Volvo and Audi cars have them now as standard. We also encourage our customers to have their cars serviced regularly, which saves fuel and reduces exhaust emission levels.

"How can I make my driving safer?"

On today's busy roads, safe cars and safe driving are essential. More and more of the cars we sell have anti-locking braking as standard. All Lex dealerships can prepare cars for MOT testing and have the car tested to ensure that it meets the government's safety requirements. We also remind our customers that regular servicing helps to keep cars safer, whatever the annual mileage. We encourage the use of rear seat belts and child restraints – all new Volvo cars can be supplied with child seats and the new 900 series saloons have a built-in child seat in the rear.

"Buying a new car is a difficult decision"

At Lex, we recognise that buying a new car is an important decision and we are concerned to make sure that the experience itself is satisfying and that customers do not feel any regrets after they have bought the car. We offer a wide range of cars from 17 different manufacturers. Our sales staff are carefully trained to ensure that they analyse the customers' requirements carefully and then provide the car which corresponds as closely as possible to those needs as well as follow up after the sale. Our approved used car schemes major on reliability to make sure that customers always feel secure when they buy a car from a Lex dealership and we have a wide range of financial packages to help the purchasing process.

"How do I know my car is properly serviced?"

In all our dealerships we have made considerable investments in people and equipment to provide the highest level of service expertise. Lex dealerships can provide fixed prices for regular servicing so that the cost is known in advance, extended opening hours to suit our customers' convenience and guaranteed genuine parts, with a high level of parts availability. We invest heavily in training for our technicians and we use the very latest in automotive technology, doing all jobs to the manufacturers' standards. Our aim is to "Get it Right First Time", every time. We hope that all our customers will find our staff friendly and accessible and always happy to talk about their motoring needs.

"What about your female customers?"

Recognising that one in four cars are bought and owned by women, we are very aware of the importance of our women customers. We have taken notice of the comments on our service from our female employees and customers and set up a special "Women's Task Force" to put over the women's point of view. We believe that all our customers should feel that they have been treated properly, courteously and efficiently.

"How do you see the future?"

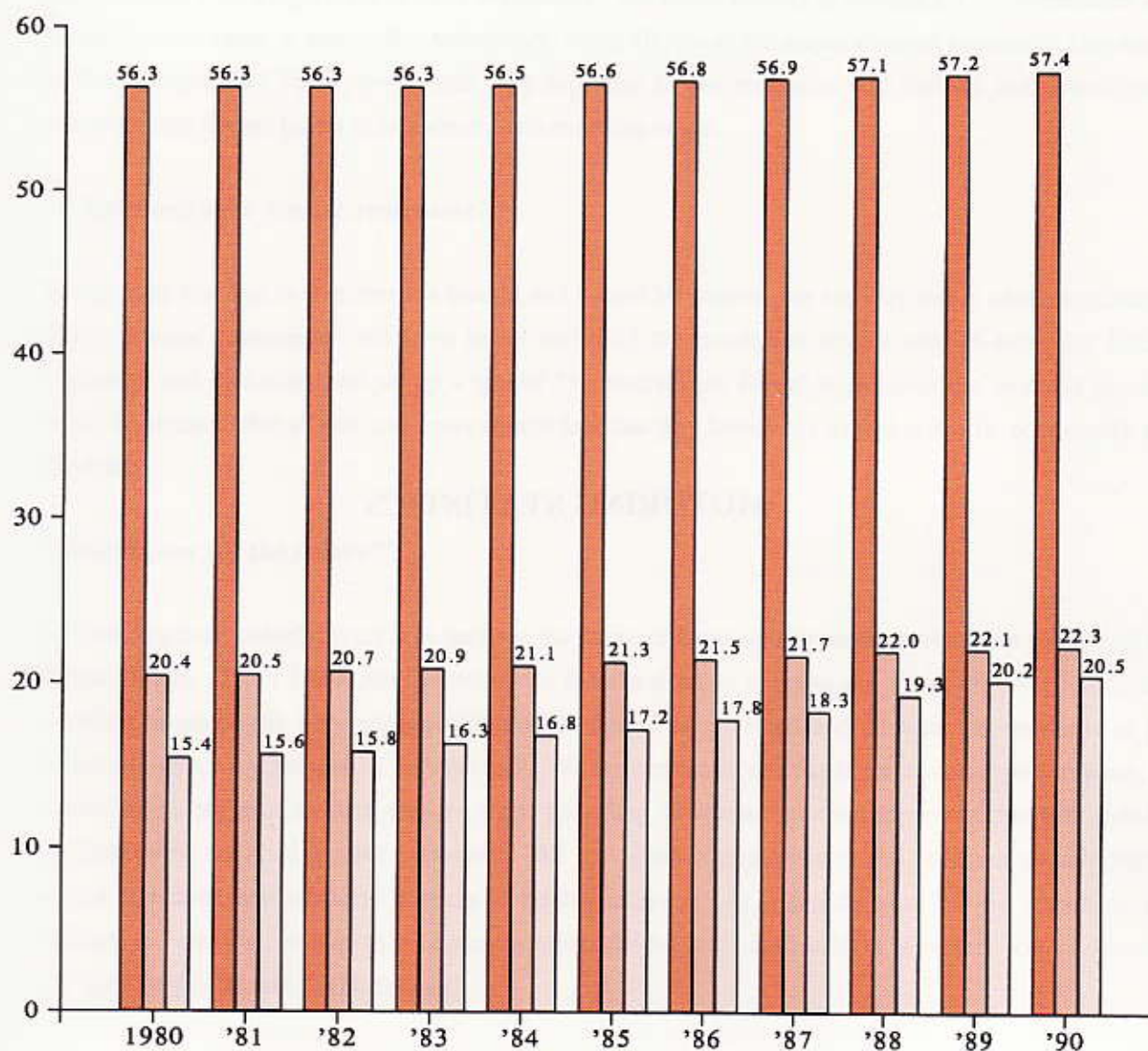
We have regularly asked drivers how they see the future in terms of new roads, government policy and the design of cars. From Lex's point of view, we see the need to improve the image of car retailing and servicing to match the improving quality and design of cars we sell and to raise the standards of the industry to match our customers' expectations. We are constantly striving to improve our performance, by extending the range of services that we offer, providing additional benefits, increasing our staff training and improving facilities for our customers. We are constantly monitoring our progress towards higher service standards, and whatever happens in the future, we at Lex will make sure that we respond to the changes and that we continue to give our customers the highest possible level of service so that they can say "Lex Service Makes the Difference".

MOTORING STATISTICS

Car Ownership in the UK I

Over the past ten years, the population of the UK has risen by 2%, the number of households by 9% while the number of cars in use grown by 33%.

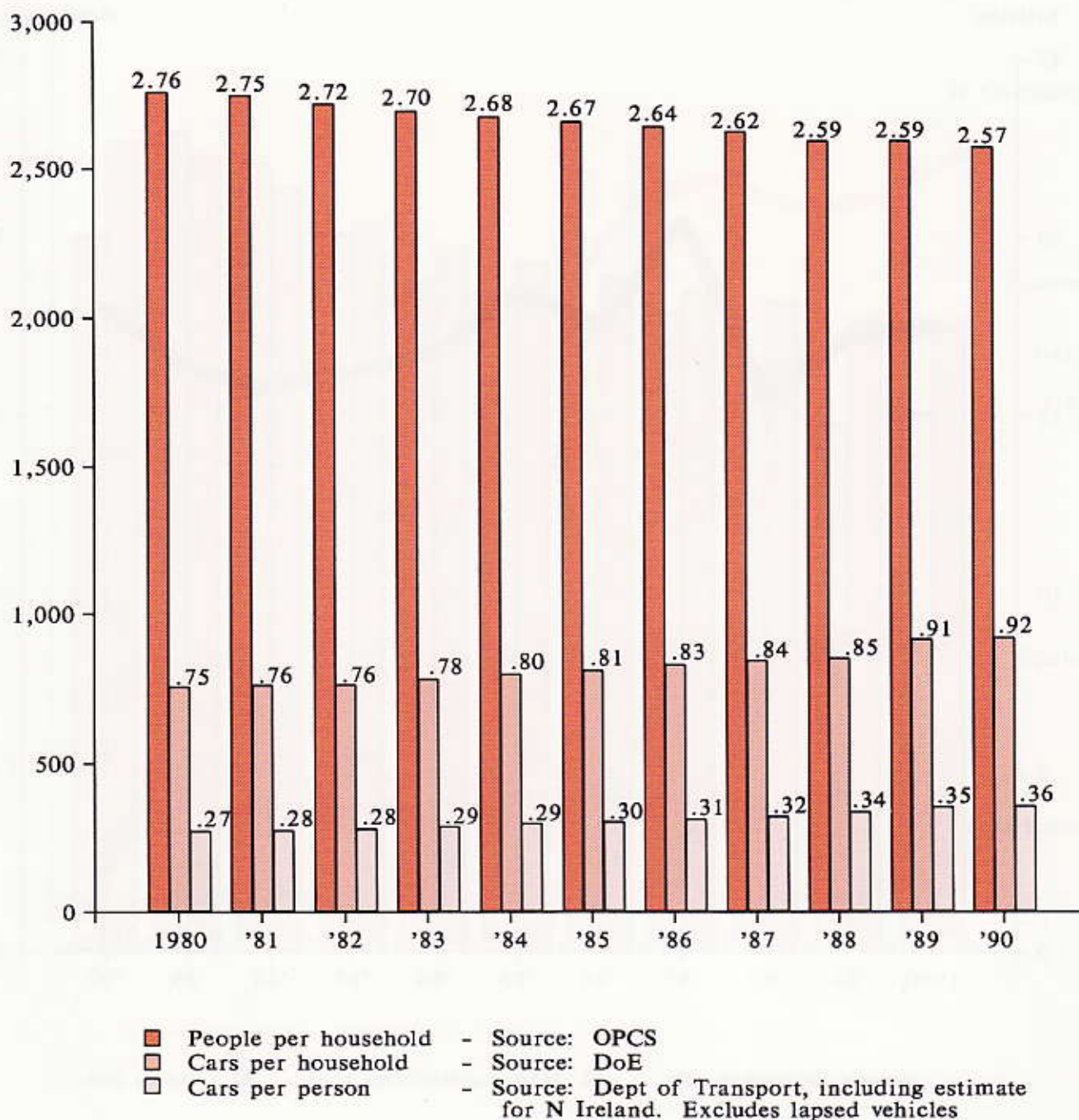
Millions



- Population - Source: OPCS
- Households - Source: DoE
- Cars in use - Source: Dept of Transport, including estimate for N Ireland. Excludes lapsed vehicles

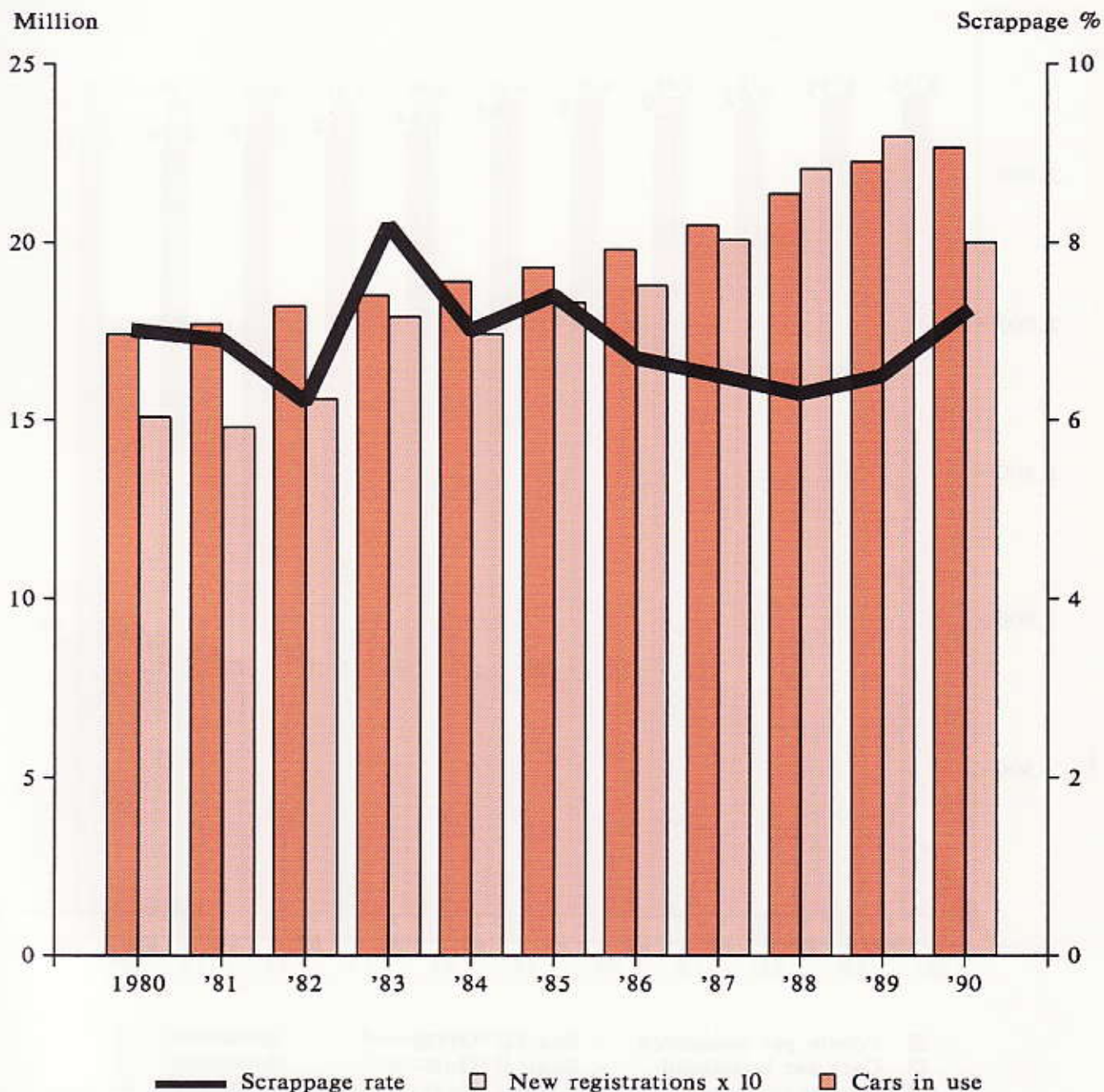
Car Ownership in the UK II

The average size of households has fallen by 7% over the past ten years, but the ownership of cars per household and per person have risen by 22% and 31% respectively.



Scrappage of Cars in the UK

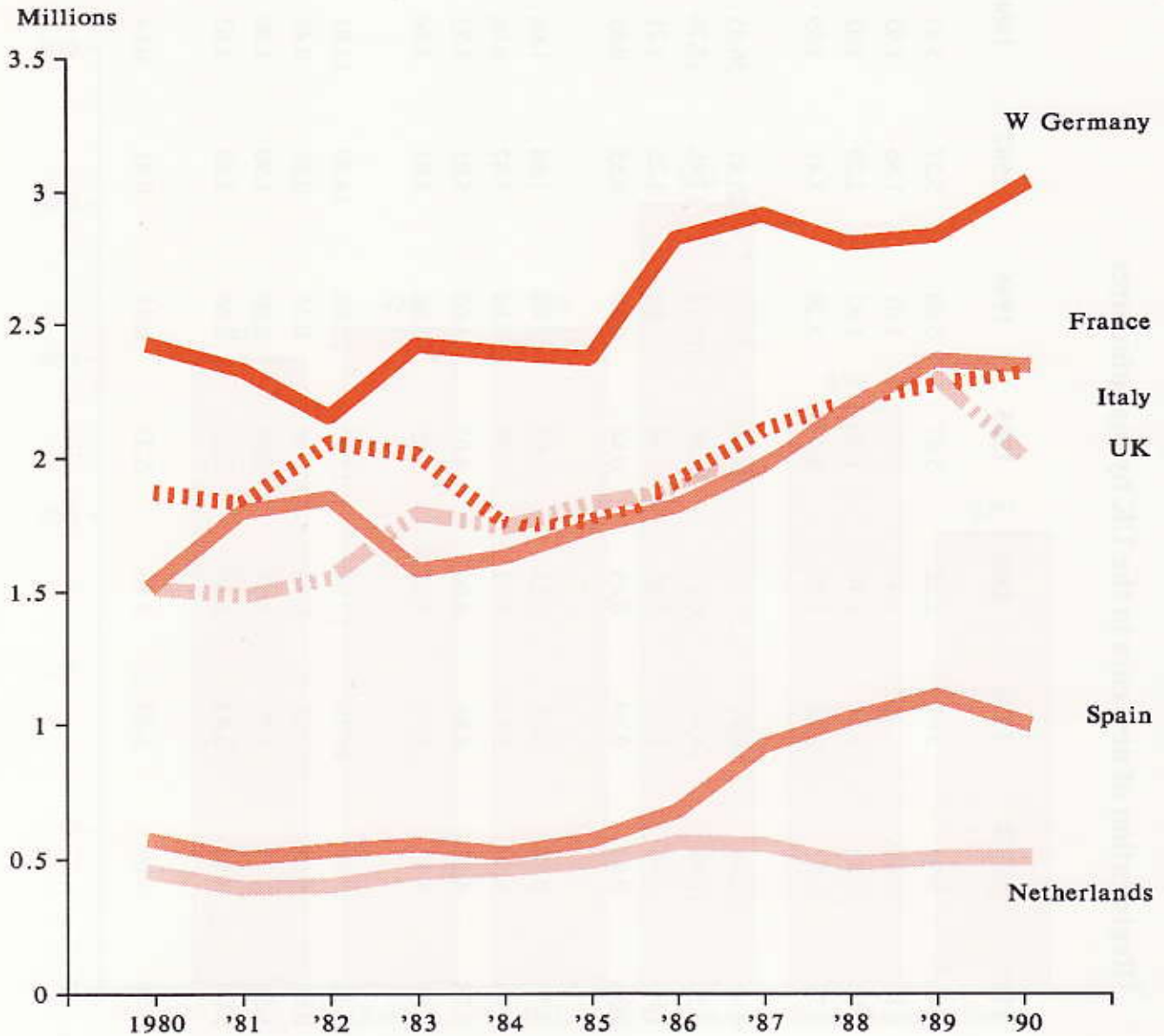
The slowing down of the economy has forced more people to scrap older cars. The number of new cars sold in Britain in 1990, although lower than in 1989 was still the third largest on record, and as a result the number of cars in use again rose. There are now 30% more cars in use than at the beginning of the decade.



Source: Lex estimates based on SMMT data

Registrations of New Cars

Sales of new cars in Europe have slowed down in many countries although the German market remains strong.



Source: SMMT from local statistics

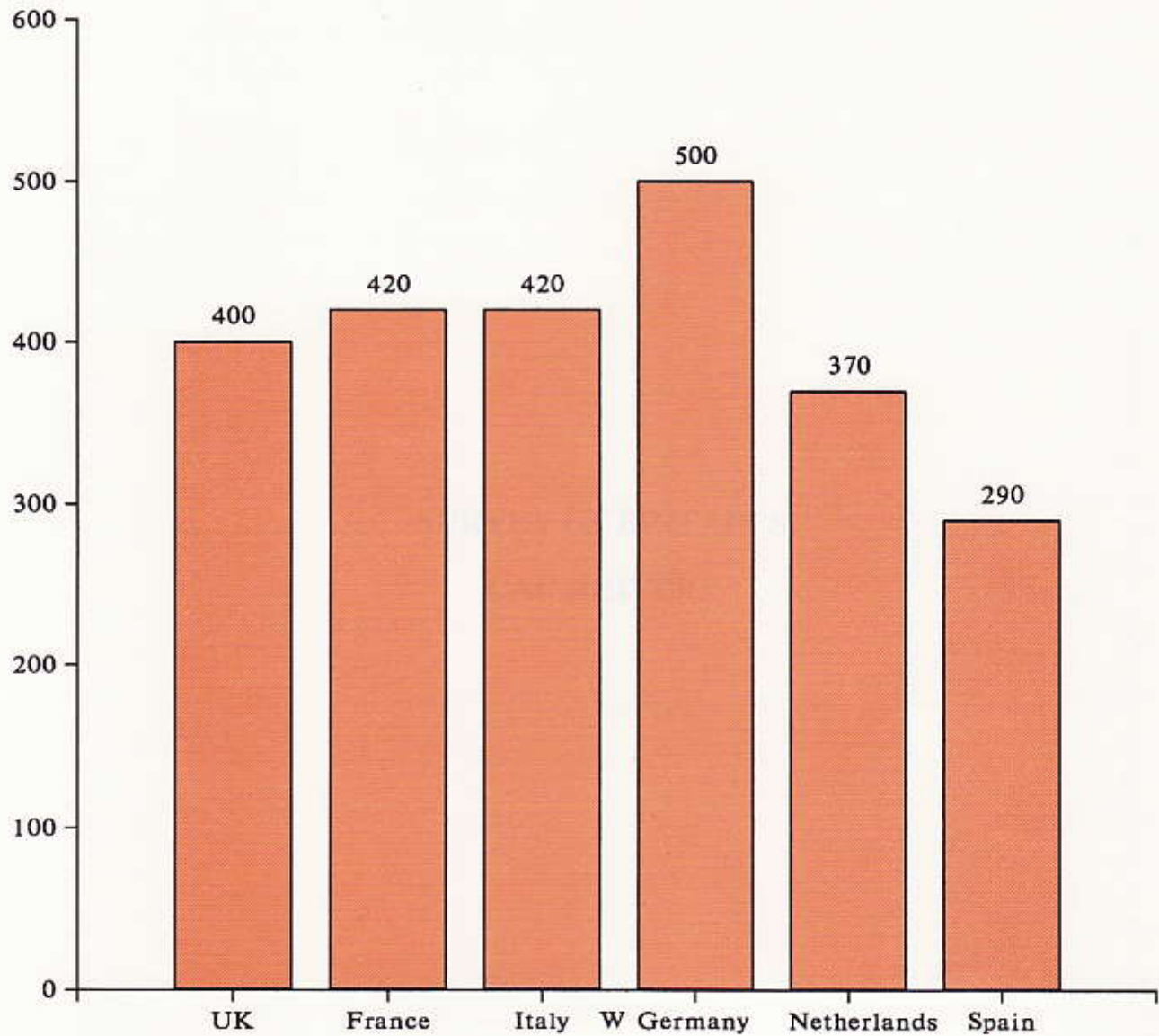
Registration of new cars in the UK by manufacturer

Market Shares %	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Audi Volkswagen (VAG)	4.51	5.40	5.94	5.62	5.52	5.67	5.80	5.37	5.45	5.55	5.76
BMW	0.89	1.15	1.48	1.41	1.47	1.83	1.91	1.86	1.93	2.13	2.14
Citroen	1.78	1.85	1.55	1.44	1.40	1.50	1.83	2.29	3.02	2.89	3.03
Fiat	2.99	3.73	2.81	2.58	2.72	2.97	3.28	3.41	3.39	3.05	2.74
Ford	30.70	30.94	30.49	28.91	27.83	26.50	27.38	28.81	26.35	26.45	25.25
GM/Vauxhall	8.72	8.57	11.69	14.63	16.17	16.56	15.11	13.45	13.70	15.21	16.08
Honda	1.50	1.06	1.05	1.05	1.08	1.04	1.09	1.23	1.21	1.17	1.58
Jaguar	0.39	0.38	0.41	0.39	0.43	0.44	0.40	0.55	0.65	0.62	0.53
Mercedes	0.59	0.72	0.78	0.75	0.83	0.99	1.06	1.08	1.08	1.23	1.32
Nissan	6.07	5.94	5.99	5.84	6.08	5.76	5.84	5.67	6.08	6.02	5.32
Peugeot/Talbot	7.61	5.78	4.87	4.44	4.00	4.02	4.60	5.03	5.72	6.04	6.16
Renault	5.84	4.85	4.13	3.51	3.42	3.85	3.68	3.91	3.86	3.83	3.36
Rover	17.83	18.82	17.41	18.18	17.84	17.90	15.80	14.99	15.01	13.57	14.01
Saab	0.53	0.64	0.61	0.53	0.50	0.46	0.55	0.52	0.48	0.53	0.59
Toyota	2.26	1.58	1.77	1.77	1.87	1.89	1.90	1.90	1.80	1.84	2.12
Volvo	2.53	3.00	3.33	3.42	3.38	3.25	3.66	3.52	3.63	3.55	3.29
Others	5.26	5.59	5.69	5.53	5.46	5.37	6.11	6.41	6.64	6.32	6.72

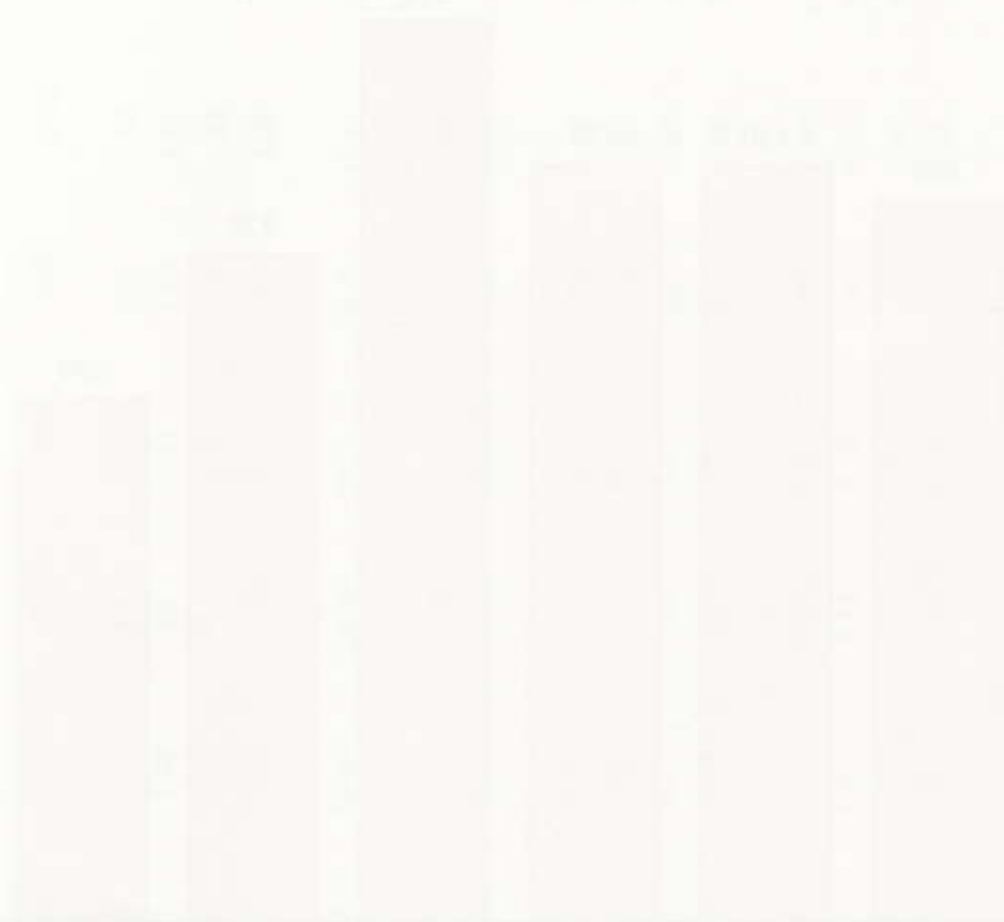
Source: Society of Motor Manufacturers and Traders

Cars per 1000 Population, 1989

Although new car registrations in the UK are similar to those in France and Italy, we still lag behind in terms of car ownership per head.



Source: SMMT from local data



INTRODUCTION TO THE RESEARCH

The 1991 Lex Report on Motoring presents the findings of a survey specially conducted for Lex Service by MORI among Britain's car drivers, defined as those driving at least once a month.

MORI interviewed a representative quota sample of 1,564 drivers in 174 constituency sampling points throughout Great Britain. All interviews were conducted face-to-face between 24th September and 6th October 1990.

The research followed the pattern established in the 1989 and 1990 reports and was designed to provide a detailed insight into Britain's drivers - who they are, how they behave and their attitudes and lifestyle. Several questions from the previous surveys have been repeated so that we can understand how Britain's drivers are changing over the years and significant trends are highlighted in the text.

Statistical reliability and definitions

The appendix gives details of the statistical reliability of the research and definitions and should be consulted for more information.

Use of Information

Figures from this report may be freely quoted (except for commercial purposes), provided reference is made to the 1991 Lex Report on Motoring.

STATISTICAL PROFILES OF BRITAIN'S CAR DRIVERS

Britain's drivers are still predominantly male (59%) and more likely to be middle class (52%) and aged 25-54 (66%) than the public on a whole (41% and 49% respectively). They are also highly likely to be married and have children under 16 (40% compared with 30% of the general public).

There are an estimated 21.4 million regular drivers in Britain representing 51% of the adult population over 17.

Profile of Britain's Car Drivers

	<u>General Public</u> %	<u>Drivers (1988)</u> %	<u>Drivers (1990)</u> %
<u>Sex</u>			
Male	48	58	59
Female	52	42	41
<u>Age</u>			
17-24	16	11	11
25-34	18	26	26
35-54	31	38	40
55-64	15	14	11
65+	20	11	11
<u>Class</u>			
AB	18) 41	24) 52	26) 52
C1	23)	28)	27)
C2	28) 59	31) 48	31) 48
DE	31)	17)	17)
<u>Lifestyle</u>			
Young, single male, no children (17-24)	4	4	4
Young, single female, no children (17-24)	3	1	2
Single, no children (25-64)*	10	9	9
Single, with children (17-64)*	2	4	5
Married, no children in h/h (17-44)#	10	12	10
Married, children under 16 (17-64)#	30	40	40
Empty nesters (45-64)	21	18	18
Retired (65+)	20	11	11

* includes widowed, divorced, separated (17-24)

includes other couples

Source: Lex Report on Motoring 1991/MORI

Lex Report on Motoring 1991

Profiles of Driver Types I

(Don't knows excluded)

Base:	<u>All</u> (1564) %	<u>Male</u> (924) %	<u>Female</u> (640) %	<u>17-24</u> (173) %	<u>65+</u> (178) %	<u>London</u> (190) %
<u>Car Driven Most . . .</u>						
Bought new	35	35	35	21	51	38
Bought second hand	65	65	65	79	49	62
<u>Engine Size</u>						
Up to 1400	46	41	55	52	61	37
1401-2000	45	50	38	42	33	49
Over 2000	9	9	7	6	6	14
<u>Age of car</u>						
Up to 3 years	33	33	31	19	30	33
Over 3 to 6 years	29	30	28	33	27	29
Over 6 years	38	37	41	48	43	38
<u>Bought</u>						
Privately	88	86	92	91	97	88
Provided by employer	8	9	5	5	1	9
Business expense	4	5	3	4	2	3
Total company	12	14	8	9	3	12
<u>Years</u>						
<u>Expected length of ownership</u>						
Average	3.75	3.60	3.98	2.51	5.39	4.27
<u>Miles</u>						
<u>Miles Car Driven</u>						
Average	9,700	11,100	7,400	11,100	5,400	8,700

Source: Lex Report on Motoring 1991/MORI

Lex Report on Motoring 1991

Profiles of Driver Types II

(Don't knows excluded)

Base:	<u>Normally drive</u>			<u>Car bought</u>	
	<u>All</u> (1564) %	<u>Private car</u> (1370) %	<u>Company car</u> (184) %	<u>New</u> (546) %	<u>Second hand</u> (1010) %
<u>Car Driven Most ...</u>					
Bought new	35	30	70	100	0
Bought second hand	65	70	30	0	100
<u>Engine Size</u>					
Up to 1400	46	49	23	49	44
1401-2000	45	44	60	43	47
Over 2000	9	7	17	8	9
<u>Age of car</u>					
Up to 3 years	33	27	76	68	14
Over 3 to 6 years	29	31	15	21	34
Over 6 years	38	42	9	11	52
<u>Bought</u>					
Privately	88	100	0	77	94
Provided by employer	8	0	65	18	2
Business expense	4	0	35	5	4
Total company	12	0	100	23	6
<u>Expected length of ownership</u>					
Average	3.75	3.93	2.19	3.88	3.70
<u>Miles Car Driven</u>					
Average	9,700	8,500	20,100	11,400	8,700

Source: Lex Report on Motoring 1991/MORI

Profiles of Driver Types III

Base:	All (1564) %	Male (924) %	Female (640) %	17-24 (173) %	65+ (178) %	London (190) %
Car runs on unleaded petrol	45	48	41	36	39	49
Drive into large towns/cities most days	19	23	12	23	5	16
Use car most days for:						
Leisure	32	32	32	62	26	26
Shopping	17	12	24	13	18	13
To/from work (base: those working)	70	75	60	71	45	59
For work (base: those working)	34	39	24	28	15	36
Use public transport 1/month+ for:						
Leisure	12	12	11	24	14	26
Shopping	10	7	13	14	15	18
To/from (base: those working)	9	9	8	17	5	26
For work (base: those working)	6	7	3	4	5	19
Certain/very willing to share car journeys	58	52	66	63	48	52
Responsible for servicing	73	90	48	57	86	77
Service car at main dealer (base: responsible for servicing)	32	31	35	20	36	37
Check servicing (base: responsible for servicing)	30	40	7	27	33	38
Future: Expect Channel Tunnel not open in 1993	20	16	25	27	16	20
Expect no tax advantages to company cars	37	34	42	29	33	41
Believe acceptable to break speed limit:						
On motorways	45	53	35	60	26	56
In towns	23	26	17	32	14	35
Number of cars in household						
1	56	61	49	40	89	51
2	34	29	40	37	10	35
3+	10	10	11	23	1	14

Source: Lex Report on Motoring 1991/MOR

Profiles of Driver Types IV

Base	Normally drive ...			Car bought ...	
	All (1564) %	Private car (1370) %	Company car (184) %	New (546) %	Second hand (1010) %
Car runs on unleaded petrol	45	43	65	65	35
Drive into large towns/cities most days	19	17	34	20	18
Use car most days for:					
Leisure	32	32	33	30	34
Shopping	17	17	13	20	15
To/from (base: those working)	70	68	78	74	68
For work (base: those working)	34	28	69	44	29
Use public transport 1/month + for:					
Leisure	12	12	12	12	13
Shopping	10	10	5	10	9
To/from work (base: those working)	9	4	6	6	10
For work (base: those working)	6	9	4	5	6
Certain/very willing to share car journeys	58	59	58	52	61
Responsible for servicing	73	72	77	76	71
Service car at main dealer (base: responsible for servicing)	32	28	63	62	15
Check servicing (base: responsible for servicing)	30	30	29	30	29
Future: Expect Channel Tunnel not open in 1993	20	19	21	18	20
Expect no tax advantages to company cars	37	37	42	44	34
Believe acceptable to break speed limit:					
On motorways	45	43	68	48	44
In towns	23	22	30	25	22
Numbers of cars in household					
1	56	59	36	56	56
2	34	32	46	33	34
3+	10	9	18	11	10

Source: Lex Report on Motoring 1991/MORI

PROFILE OF BRITAIN'S CARS

A third (34%) of Britain's cars were bought new by their owners although this rises to 72% of cars bought by companies or as a business expense. Company cars also tend to have larger engines with 19% over 2000cc compared with just 8% of privately owned cars.

The average car on the road is just over five years old. The average for company cars is 2.4 years although this depends a lot on whether it was bought by the company (1.7 years) or as a business expense (3.8 years).

In the past two years 45% of drivers have been responsible for buying a new car of which 28% were bought new and 72% were used.

Lex Report on Motoring 1991

Profile of Britain's Cars

(Don't knows excluded)

Base:	<u>Co. Cars</u>						
	<u>Cars</u> (2413) %	<u>Bought new</u> (809) %	<u>Bought second hand</u> (1540) %	<u>Private</u> (2009) %	<u>All</u> (335) %	<u>Provided by employer</u> (214) %	<u>Buyer expense</u> (121) %
Bought new	34	100	0	28	72	85	49
Bought second hand	66	0	100	72	28	15	51
<u>Engine Size</u>							
Up to 1400cc	47	46	48	50	24	20	30
1401-2000cc	44	45	44	42	57	64	44
Over 2000cc	9	9	8	8	19	16	26
<u>Type of Ownership</u>							
Bought privately	86	71	94	100	0	0	0
Provided by employer	9	22	2	0	64	100	100
Business expense	5	7	4	0	36	0	100
<u>Age of Car</u>							
0-3 years	33	69	14	26	74	86	52
3-6 years	28	21	32	30	17	12	25
Over 6 years	39	10	54	44	9	2	23
<u>Mean Age</u>							
1990	5.2	2.7	6.6	5.7	2.4	1.7	3.8
1989	5.0	2.4	6.2	5.4	2.0	1.6	2.9
1988	5.2	2.6	6.5	5.6	2.3	n/a	n/a

Source: Lex Report on Motoring 1991/MORI

DRIVERS' BEHAVIOUR

Annual Mileage

On average Britain's drivers estimate that the car they drive most often is driven 9,700 miles a year. This represents a 7% decline from last year suggesting that the harsher economic climate, including higher petrol prices, may have had an effect on driving behaviour. One third (33%) of drivers estimate that they drive only 6,000 miles a year or less and slightly more (38%) reckon they drive between 6-1200 miles a year.

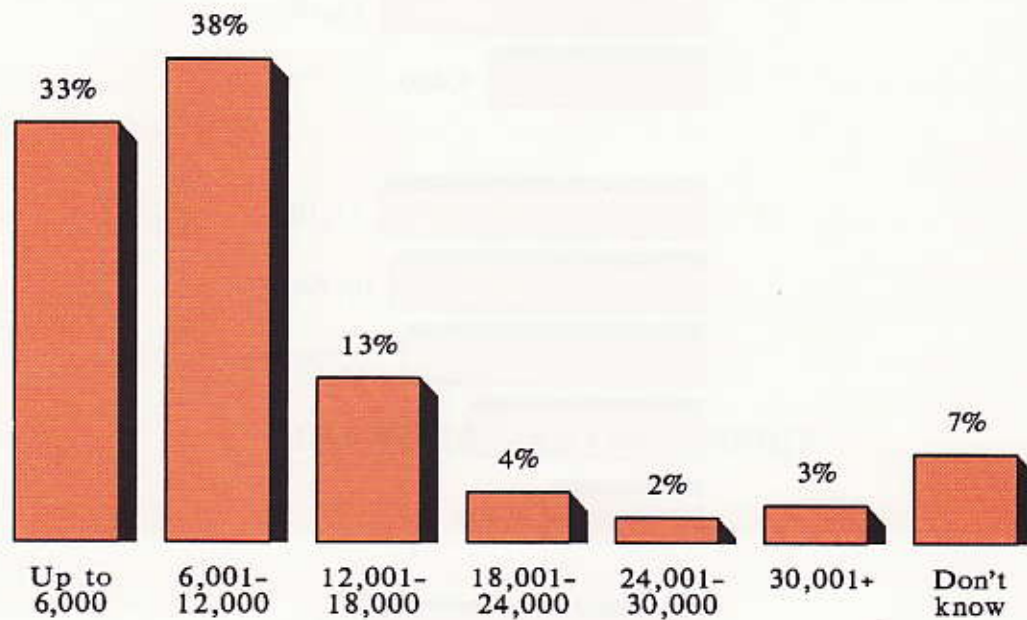
Men (11,100 miles), 17-24 years olds (11,100 miles), and, in particular, young single males (12,900 miles) claim to do the most driving in a year although the highest category of users are those with a company car who reckon their car is driven an average 18,500 miles a year. Those buying new cars with the expectation of keeping them less than three years do tend to be 'high milers' - 23% of these drive over 20,000 miles a year, three times the national average.

The decline in average miles driven since 1989 is apparent for all sub-groups.

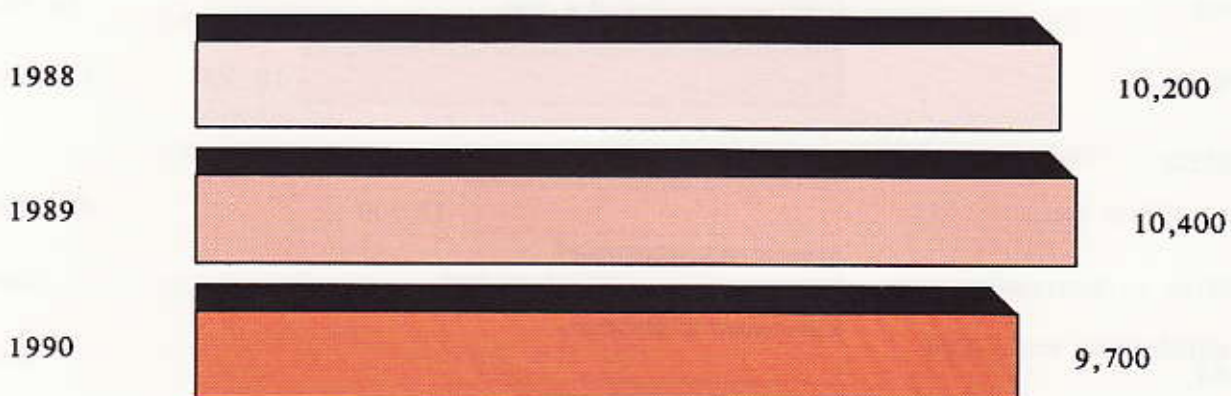
	Car was . . .				
	All (1,564)	Bought new/ intend to keep up to 3 years (269) %	Bought new/ intend to keep over 3 years (218) %	Bought second hand/intend to keep up to 3 years (476) %	Bought second hand/intend to keep over 3 years (420) %
Annual Mileage					
Up to 6000	33	16	39	33	37
6,001-12,000	38	39	37	37	41
12,001-20,000	15	21	15	19	13
20,001+	7	22	3	7	2
Don't know	7	2	6	4	7
Average	9,700	14,300	8,600	9,500	8,100

Estimates of Miles Driven I

Q Approximately, how many miles is the car (which you drive most) driven a year, on average?



Average Trends

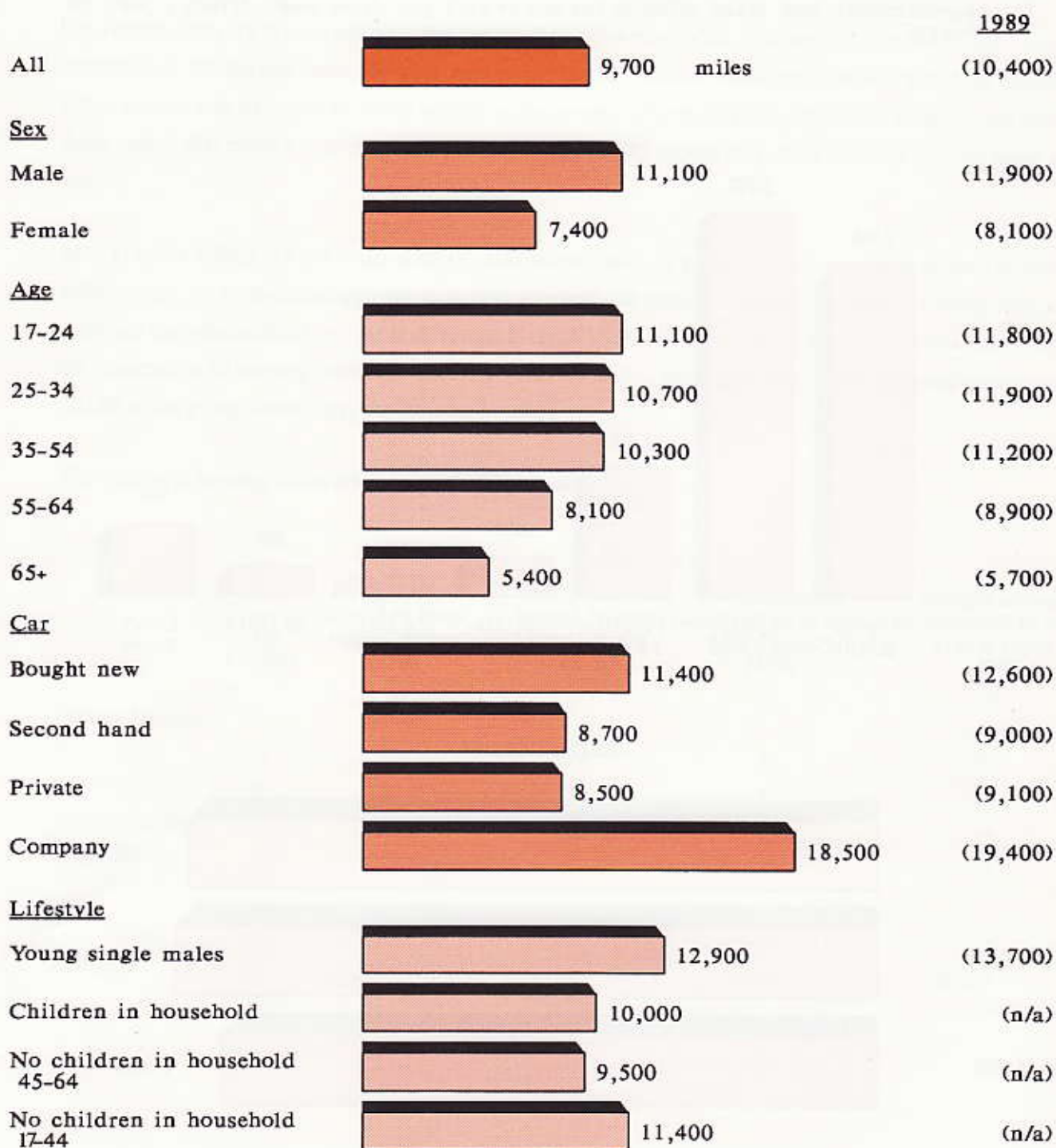


Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

Estimates of Miles Driven II

(Based on car driven most often by those in each group)



Source: Lex Report on Motoring 1991/MORI

LENGTH OF CAR OWNERSHIP

LENGTH OF CAR OWNERSHIP

On average drivers expect to keep their cars a total of 3.75 years. This represents a slight increase in the average expected length of ownership reinforcing the view that drivers are being affected by the changed economic circumstances to the extent of delaying the replacement of their cars.

It is interesting to note that the expected intended length of ownership of cars bought new has increased by around eight months since 1989 which, because of the high propensity for cars bought new to be replaced by new cars, would have a direct impact on new car sales. Indeed, if these expectations were borne out it could result in a 20% decline in new car sales. In 1990 the car market experienced a 13% decline.

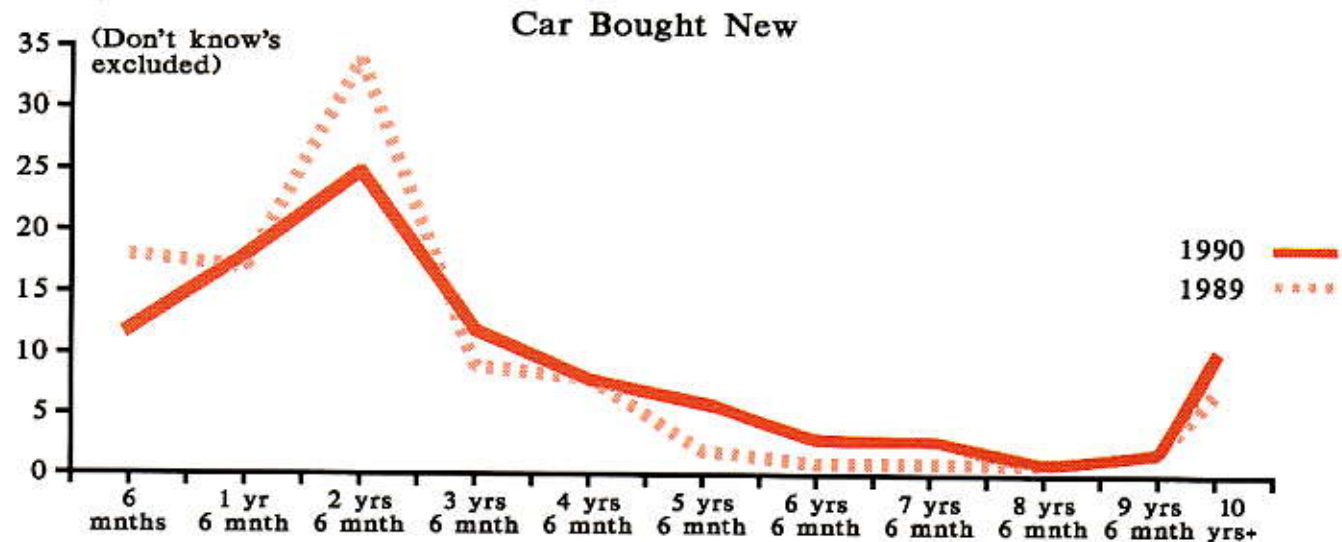
The expected length of ownership of second hand cars has also declined but only to a very small degree.

Privately owned cars tend to be kept longer than company cars (average 3.9 compared with 2.5 years) and those bought new are, if anything, intended to be kept longer than those bought second hand (3.9 compared 3.7 years), a reversal of the position in 1989.

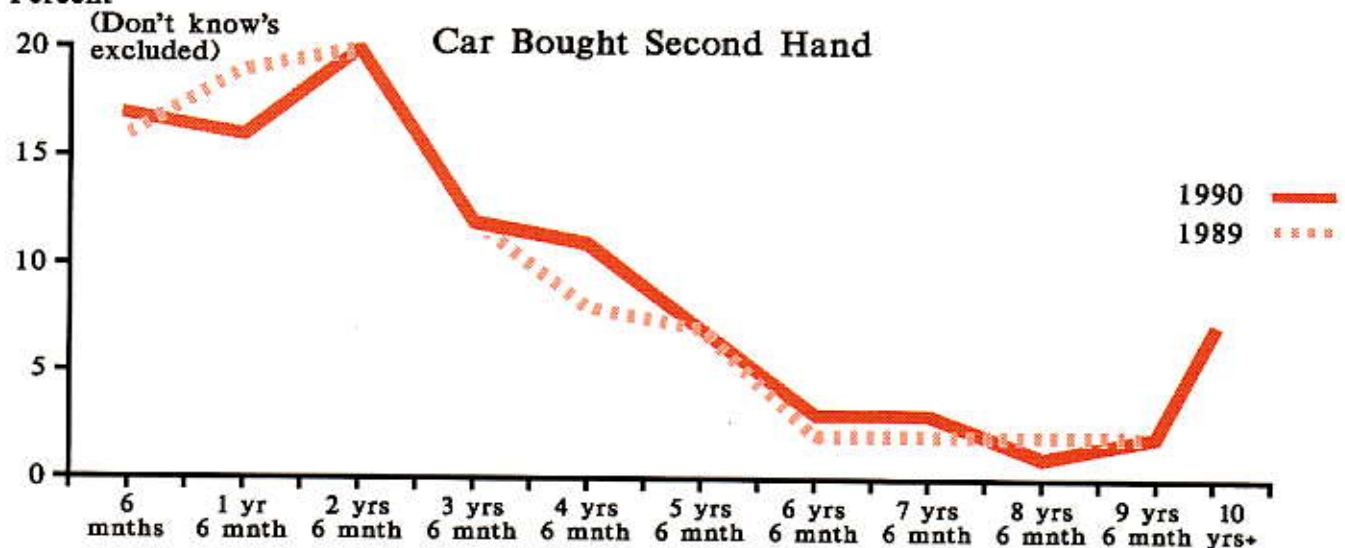
Length of Car Ownership

Q In total, how long do you think you will keep your current car. Please take into account how long you have already owned it and how much longer you are likely to keep it?

Percent



Percent



Mean

	1989	1990
Mean	3.50	3.75

Company

Company	2.16	2.55
---------	------	------

Private

Private	3.70	3.93
---------	------	------

Bought new

Bought new	3.23	3.88
------------	------	------

Bought second hand

Bought second hand	3.64	3.70
--------------------	------	------

Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

CAR OWNERSHIP EXPECTATIONS

On average there are 1.58 cars in each household containing at least one driver in Britain, the same as in 1989, suggesting that the economic conditions have meant that the expected increase in the average number of cars per household predicted by drivers in last year's survey has now moderated. Nonetheless, drivers expect a slight increase in the numbers of cars in their households in two years time to an average of 1.63. Clearly there is still a strong desire to own cars but this has been tempered by the current economic decline.

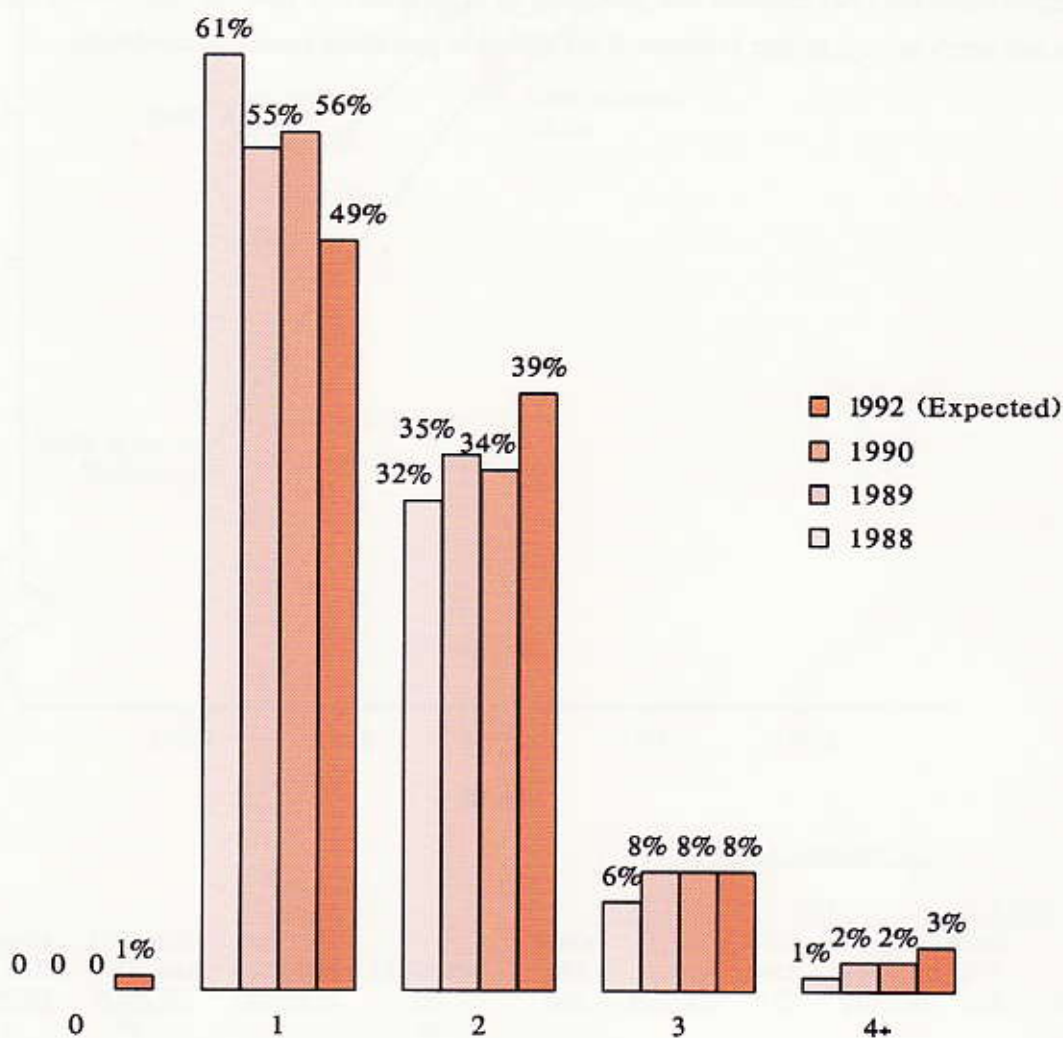
Just over half (56%) of drivers interviewed said they had one car in their household, about the same as last year, although this is expected to decline to 49% in two years time as more households move to multiple car ownership. One in three (34%) have two cars in their households though this is expected to rise to 39% in two years time. On the basis of published figures and estimates this would suggest there were approximately 23.1 million cars in Britain in October 1990 and this is expected to rise to 25 million cars by the end of 1992.

Households with an above average number of cars include those with company cars (1.85), those in London (1.7), those in the South East/East Anglia (1.65) and those with young single males (2.15). As in 1989 Scotland had the least number of cars per household at 1.39.

Car Ownership Expectations

Q How many cars are there in your household?

Q And how many cars do you expect there to be in your household in two years' time?



Base: All drivers (1,564)

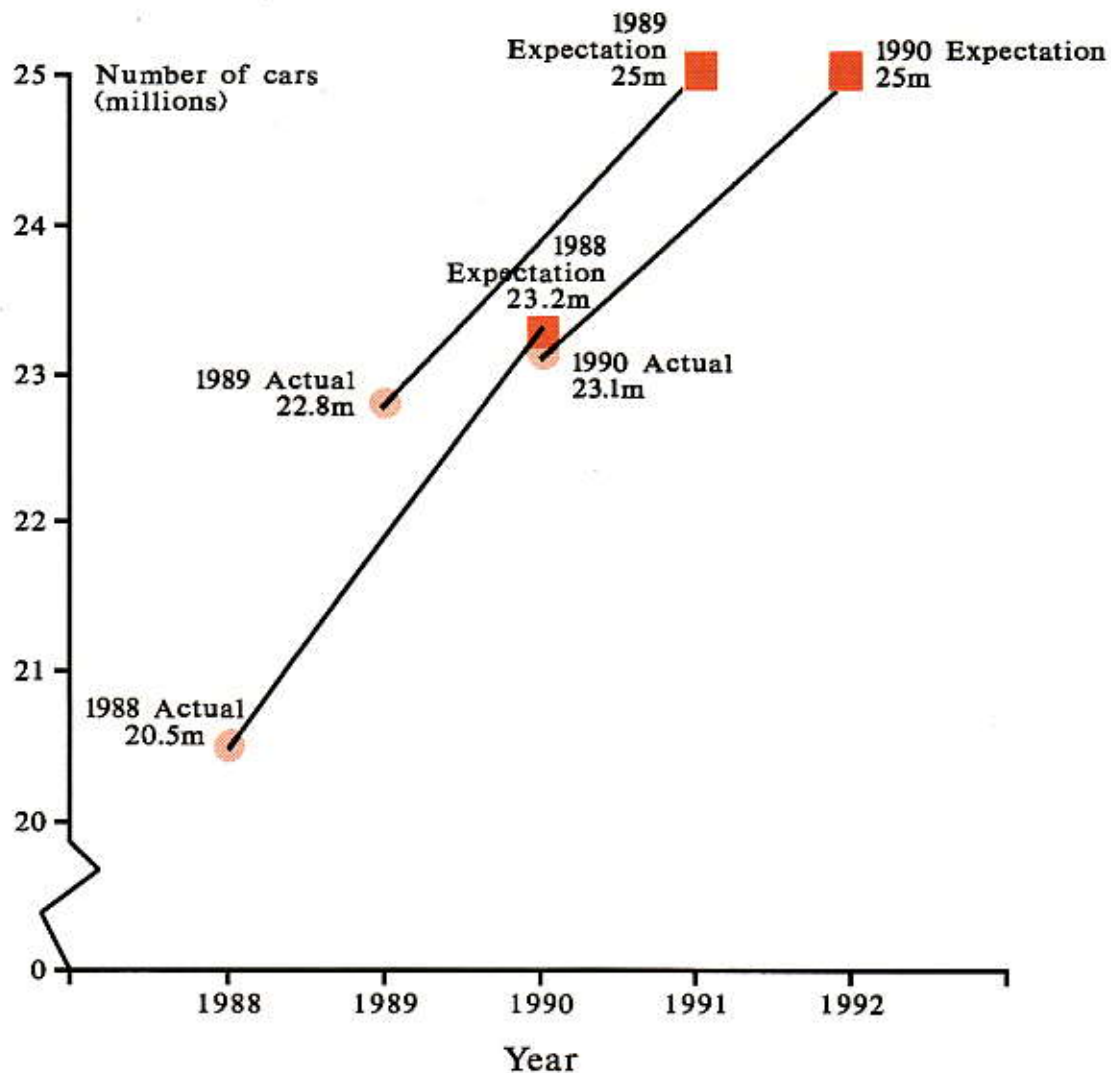
Source: Lex Report on Motoring 1991/MORI

GROSSED UP ESTIMATES AND EXPECTATIONS

In the 1988 Survey (1989 Lex Report) grossed up estimates suggested there were 20.5 million cars in Britain in 1988. This rose to 22.8 million in 1989 and 23.1 million in 1990.

It is interesting to note that grossed up expectations for future car ownership in the 1989 report suggested there would be 23.2 million cars by October 1990, almost exactly the figure achieved. However, the expectations for 1992 recorded this year gross up to no more cars than the expectations recorded for 1991 in last year's survey, further evidence of the effects of prevailing economic conditions.

Grossed up Estimates of Numbers of Cars in Britain at time of Surveys and Expectations in Two Years Time



				Expectations in:					
	H/holds in GB (OPCS) m	H/holds with car (OPCS) %	Ave. Cars per h/h with car (MORI)	Grossed up m	1988 Cars per h/h million	1989 Cars per h/h million	1990 Cars per h/h million	1991 Cars per h/h million	1992 Cars per h/h million
1988	21.3	65	1.48	20.5					
1989	21.5	67	1.58	22.8					
1990	21.8 e	67 e	1.58	23.1	1.59	23.2			
1991	22.0 e	68 e				1.67	25.0		
1992	22.2 e	69 e						1.63	25.0

Source: Lex Report on Motoring 1991/MORI

EFFECTS OF THE ECONOMIC CLIMATE

We have shown above how a number of measures suggest the harsher economic climate is effecting drivers' behaviour and this is borne out in the results to the question asking which of a range of actions people have taken over the last year as a result of the worsening economic climate and high interest rates.

One in seven (14%) claim to have reduced the number of miles they have driven although this rises to one in five (22%) of those aged 65 or over.

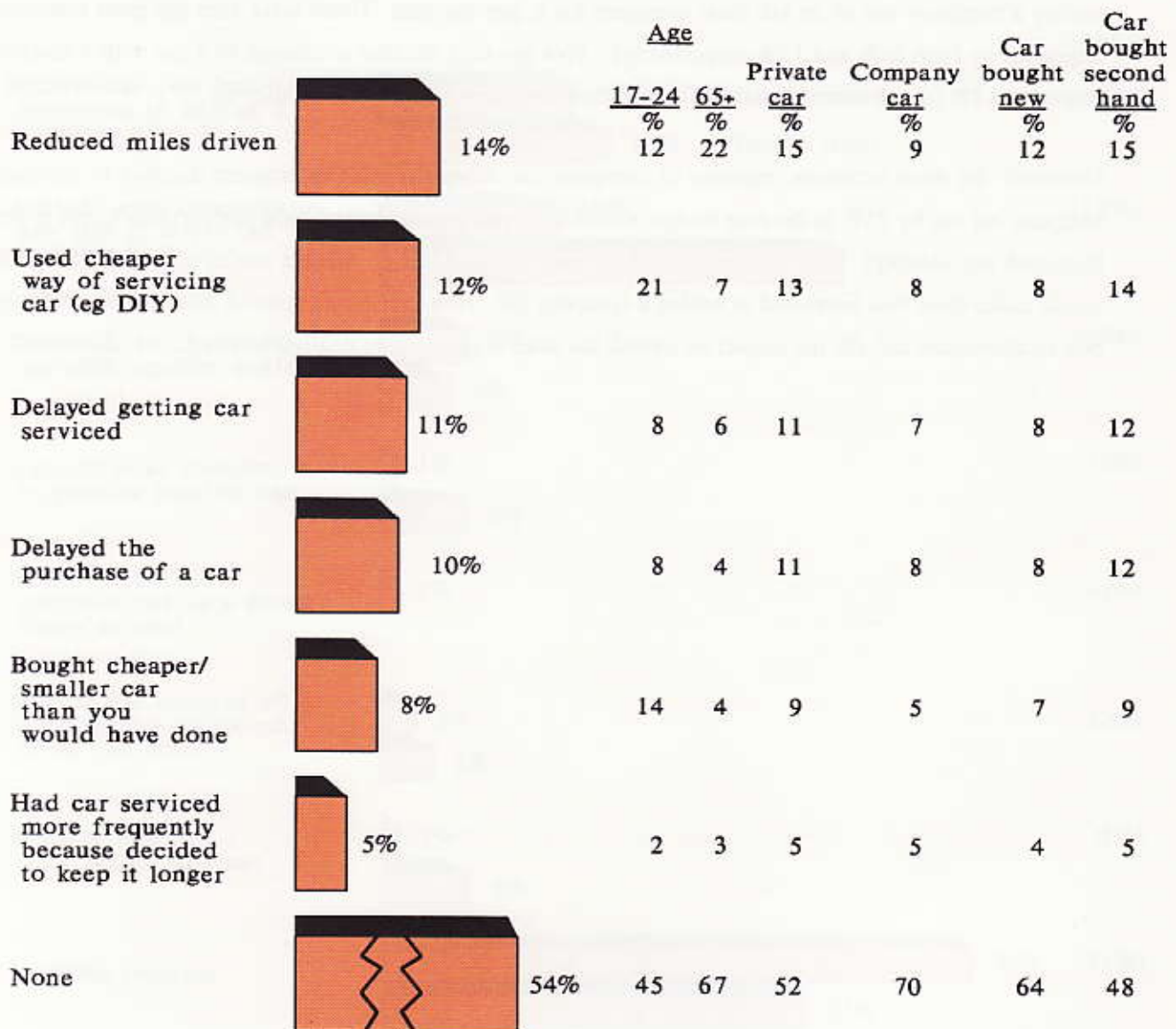
One in eight (12%) have switched to a cheaper way of servicing their car although this is particularly true of younger drivers of whom one in five (21%) claim to have done so.

One in nine (11%) have delayed getting their car serviced, particularly second hand car drivers (12%). One in ten (10%) claim to have **delayed** the purchase of a car. This included 8% of those whose current car was bought new, which goes some way towards explaining the 13% reduction in retail sales. Private car owners were more likely than company car owners to have delayed their car purchase (11% compared with 8%) although those who drive a company car may not have registered a response where their employer had delayed the car purchase decision.

One in twelve (8%) have opted for a cheaper/smaller car than they might have otherwise bought, particularly young drivers (14%), and one in twenty (5%) claim to have increased the frequency of their servicing because they have decided to keep their car longer.

Effects of Economic Climate

Q Have you done any of these things over the last year, as a result of the worsening economic climate and high interest rates?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

EFFECT OF COMPANY CAR TAX

Company car drivers appear to have reacted as much to the last budget increase of 25% in company car tax as they did to the 1988 increase of 100% with 29% claiming to have taken at least one of a series of suggested actions.

The most common responses but only by 11% and 10% respectively, were to become less interested in having a company car or to ask their company for a pay increase. These were also the most common responses in 1988 (8% and 12% respectively). Five per cent decided to change to a car with a smaller engine and 1% (down from 5% in 1988) asked their company to provide a smaller car.

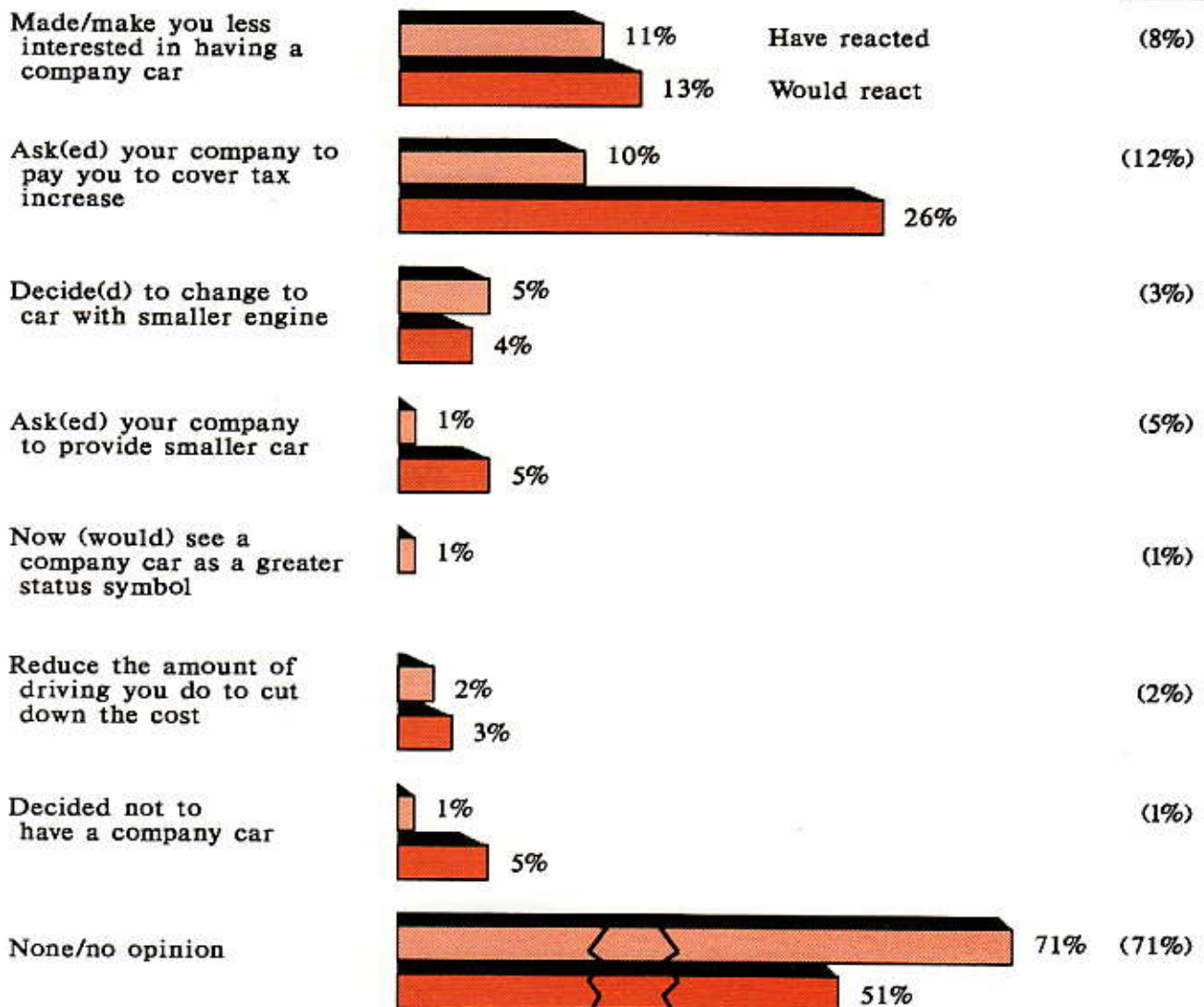
However, the most common response of company car drivers if the Government decided to increase company car tax by 25% in the next budget would be to ask their company for a pay increase to cover the increased tax liability. This was mentioned by one in four (26%). Around one in eight (13%) said it would make them less interested in having a company car. However, since most of these would probably buy an alternative car, the net impact on overall car sales is likely to be negligible.

Company Car Tax

Q As you may know the government increased the tax on company cars in the last budget. Which, if any, of these describe the way in which you have reacted to these changes?

Q If the government decided to increase the tax on company cars by 25% in the next budget, which of these describe the way you think you would react?

(1988)



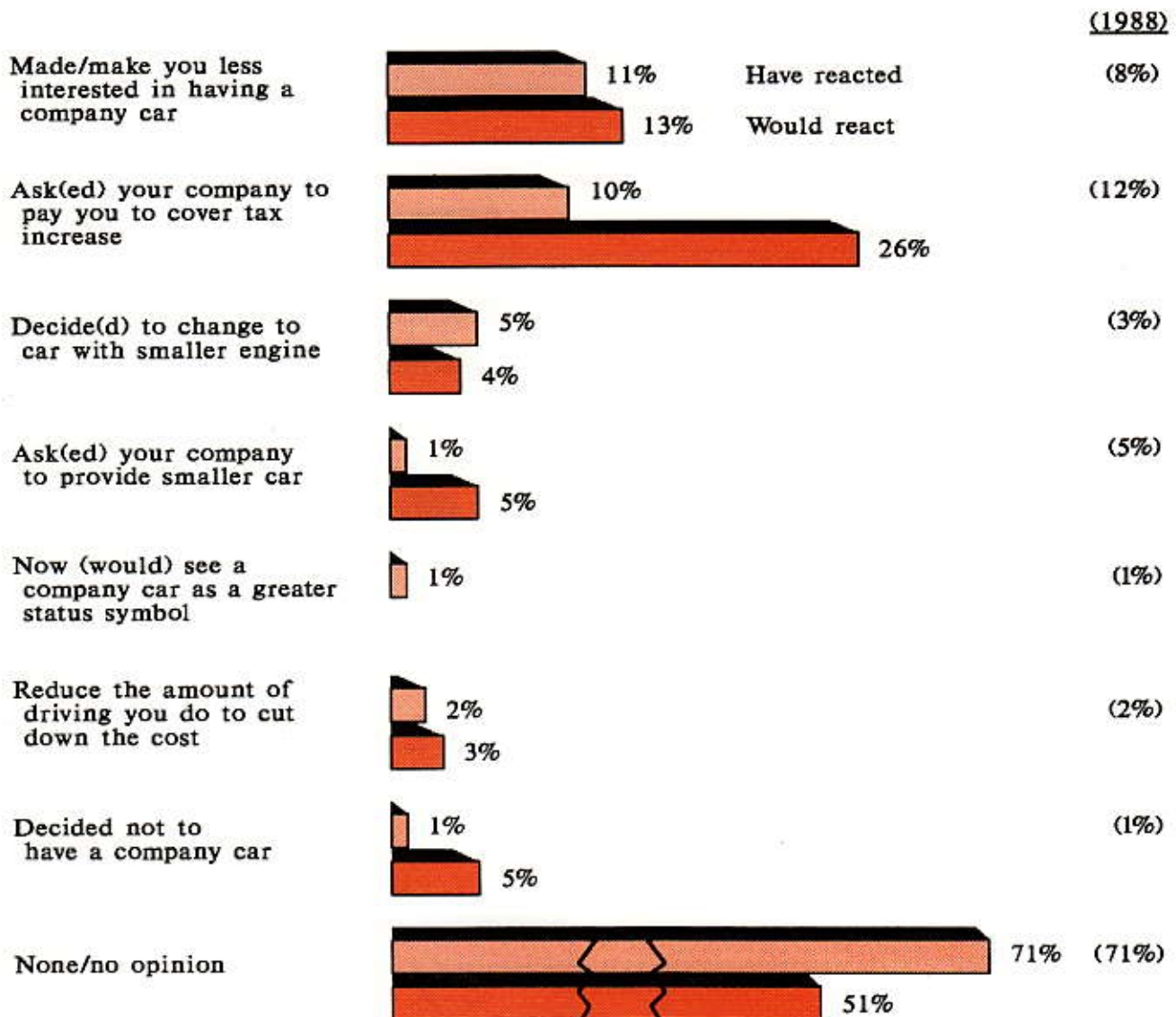
Base: Drive company car (301)

Source: Lex Report on Motoring 1991/MORI

Company Car Tax

Q As you may know the government increased the tax on company cars in the last budget. Which, if any, of these describe the way in which you have reacted to these changes?

Q If the government decided to increase the tax on company cars by 25% in the next budget, which of these describe the way you think you would react?



Base: Drive company car (301)

Source: Lex Report on Motoring 1991/MORI

EXTRA SECURITY FEATURES

Many drivers are investing in extra security features for their cars. Asked which of a list of new features they had acquired as extras on the car they drive, window etching was most widely mentioned, one in four (27%) have acquired this on the car they drive, rising to one in three (34%) of those whose cars were bought new.

Car alarms have been acquired by 17% (20% of new car drivers) and stickers saying "car alarm" by 14% (17% of new car drivers). Other features include radios with security codes (11% or 18% of new car drivers and 28% of company car drivers), handbrake locks (6%) and accelerator locks (4%). Half the population (49%) now have at least one of these features on their cars rising to two thirds (63%) of those who drive over 20,000 miles a year.

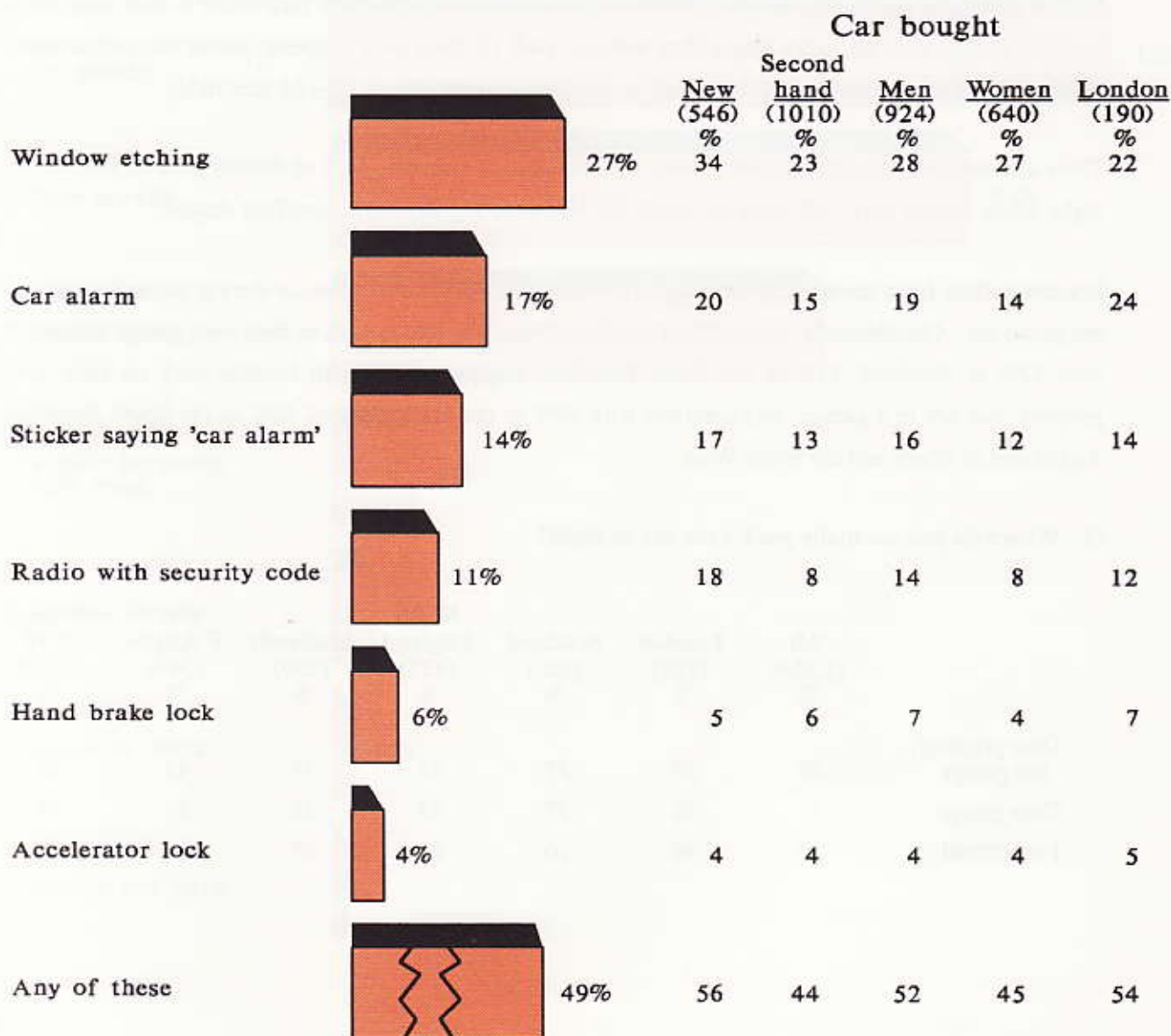
Those most security conscious tend to live in London, the north of England and Scotland where the acquisition of extra security features tends to be higher than elsewhere, particularly car alarms. In these three regions around one in four have car alarms compared with around one in eight elsewhere.

Men are generally more likely to opt for extra security features than women.

Curiously, those who park on the road at night are, if anything, less likely to have acquired extra security features on their cars than those who park in a garage, particularly window etching (21% compared with 33%). This is explained by the much higher propensity of cars bought new to be parked in a garage overnight and it is also these cars which tend to have more security features.

Extra Security Features

Q Which, if any, of these security features have you acquired as extras on the car you drive?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

NIGHT-TIME PARKING

Two thirds of drivers (69%) park their cars on their own property at night, either in a garage (31%) or more frequently not in a garage (38%). A quarter (24%) park on the public highway; this grosses up to around 5.4 million cars. A few (4%) but still 900,000 vehicles, are parked on public property, but off the road.

Garage parking is particularly popular for those aged 55 or over where 51% park either in their own, or in a rented garage and markedly fewer than average park on their own property, or on the public road. Young drivers are particularly likely to park on the public road (34% of 17 - 24 year olds).

There are also notable regional differences. In London, for example, 46% of drivers park on the road at night, while around only 16% do in Scotland, the Midlands and the South East/East Anglia.

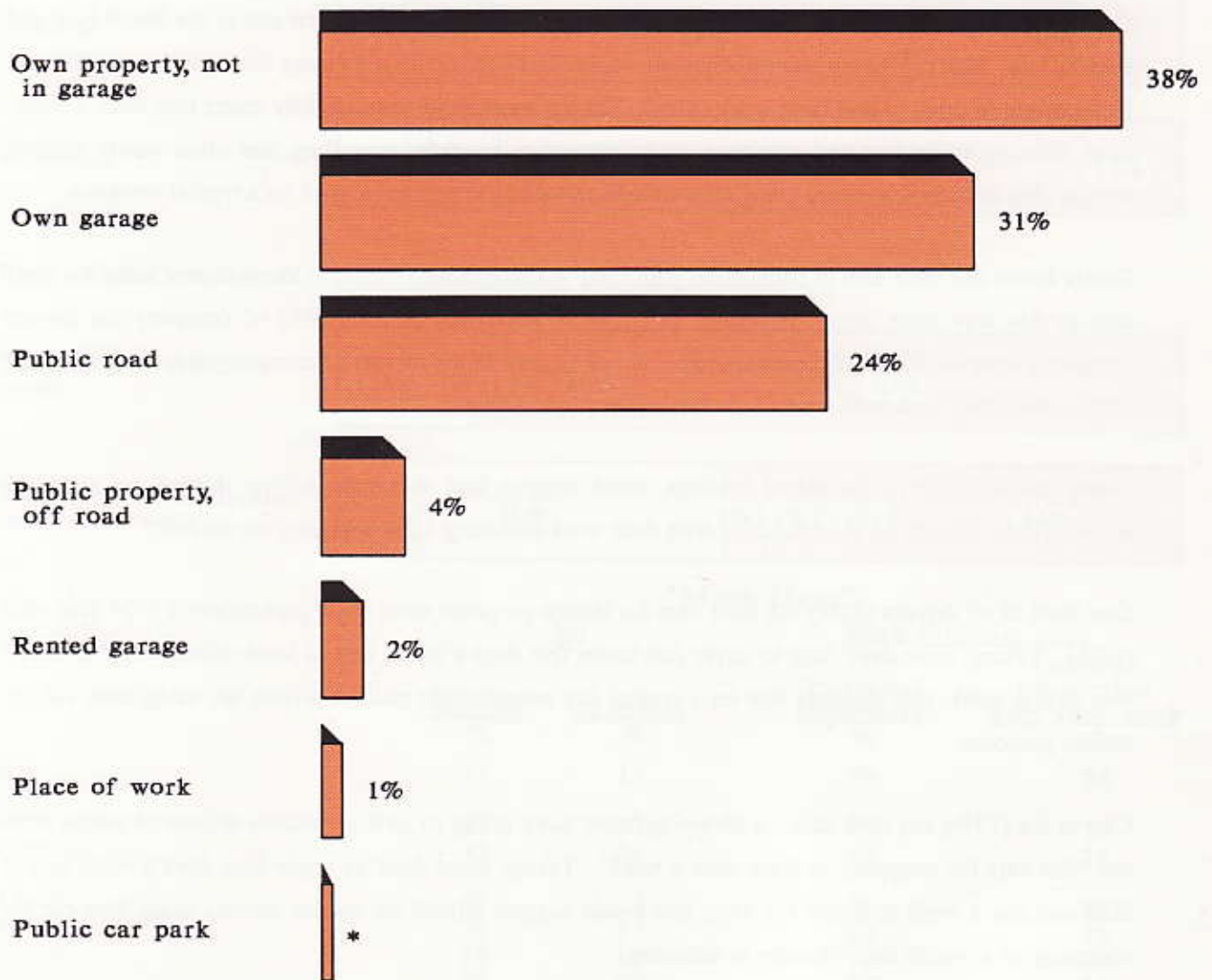
London suffers from having a great many properties that were built before, or during the early years of the motor car. Consequently, only 22% of London drivers are able to park in their own garage compared with 37% in Scotland, 35% in the South East/East Anglia, and 28% in London park on their own property, but not in a garage; this contrasts with 45% in the Midlands, and 42% in the South East/East Anglia and in Wales and the South West.

Q Where do you normally park your car at night?

	All (1,564) %	London (190) %	Scotland (135) %	North England (423) %	Midlands (260) %	SE/ E Anglia (344) %	Wales/ S W (212) %
Own property, not garage	38	28	37	35	45	42	42
Own garage	31	22	37	32	31	35	27
Public road	24	46	16	25	17	14	28

Night Time Parking

Q Where do you normally park your car at night?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

USE OF THE CAR

Drivers were asked to say how often they used their cars for various purposes – driving to/from work, driving in connection with their work, shopping and leisure.

Among those who work either full or part-time, 70% of drivers claim to use their car for travelling to and from work 'most days'. This includes 78% of those who drive company cars and 68% of private car drivers. This rises to 78% in the Midlands and falls to around 60% in London and in the South East and East Anglia. Men (75%) are more likely than women (60%) to do so and young single males are the most likely group to drive to and from work (81%). Taking 'most days' to be slightly under four days a week, from Monday to Friday, and making a slight allowance for those travelling less often would suggest around nine million drivers are using their cars for travelling to and from work on a typical weekday.

Rather fewer use their cars in connection with their work once they arrive. One in three (34%) use their cars in this way most days. However, this rises to seven out of ten (69%) of company car drivers compared with only 28% of private owners. However, one in ten drivers of company cars never use their car in connection with their work.

Using similar logic to the above findings, these suggest that over four million drivers, on a typical working day, are driving in connection with their work including 1.3m company car drivers.

One third of all drivers (32%) use their cars for leisure purposes most days, particularly 17–24 year olds (62%). Taking 'most days' here to imply just under five days a week, and 'at least once a week' to imply two days a week, this suggests that on a typical day around eight million drivers are using their car for leisure purposes.

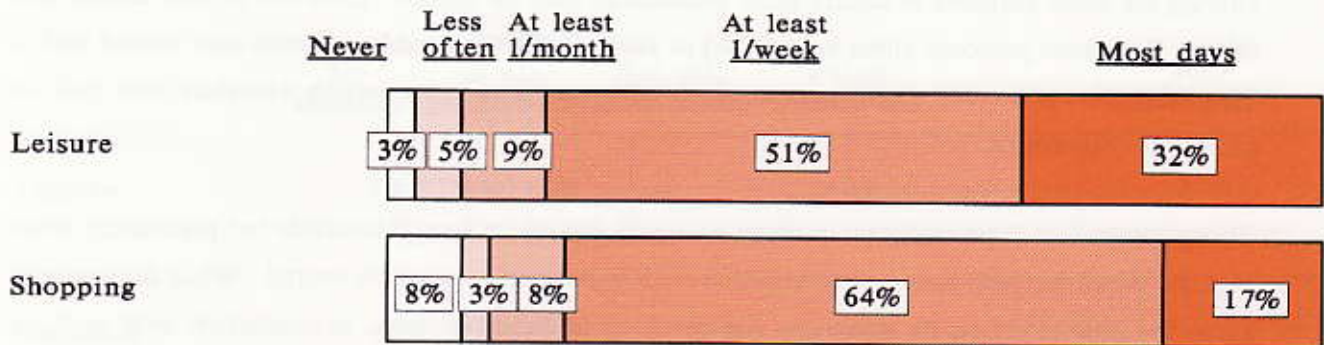
One in six (17%) use their cars for shopping 'most days' rising to 24% of women drivers of whom 91% use their cars for shopping 'at least once a week'. Taking 'most days' to imply four days a week and at least one day a week to imply 1.5 days, this would suggest around six million drivers using their car for shopping on a typical day, Monday to Saturday.

Lex Report on Motoring 1991

Use of the Car

Q How often do you personally use your car for each of the following nowadays?

Base: All Drivers (1,564)



Base: Those working full/part time (1,114)



"Most Days"

	All		Work full/part time	
	Leisure %	Shopping %	Travel to/from work %	Travel in connection with your work %
All	32	17	70	34
Male	32	12	75	39
Female	32	24	60	24
17-24	62	13	71	28
25-34	36	13	68	33
35-54	26	19	72	38
55-64	22	20	68	24
65+	26	18	45	15
Young, single males	75	10	81	36
Company car	33	13	78	69
Private car	32	17	68	28

Source: Lex Report on Motoring 1991/MORI

THE DRIVING EXPERIENCE

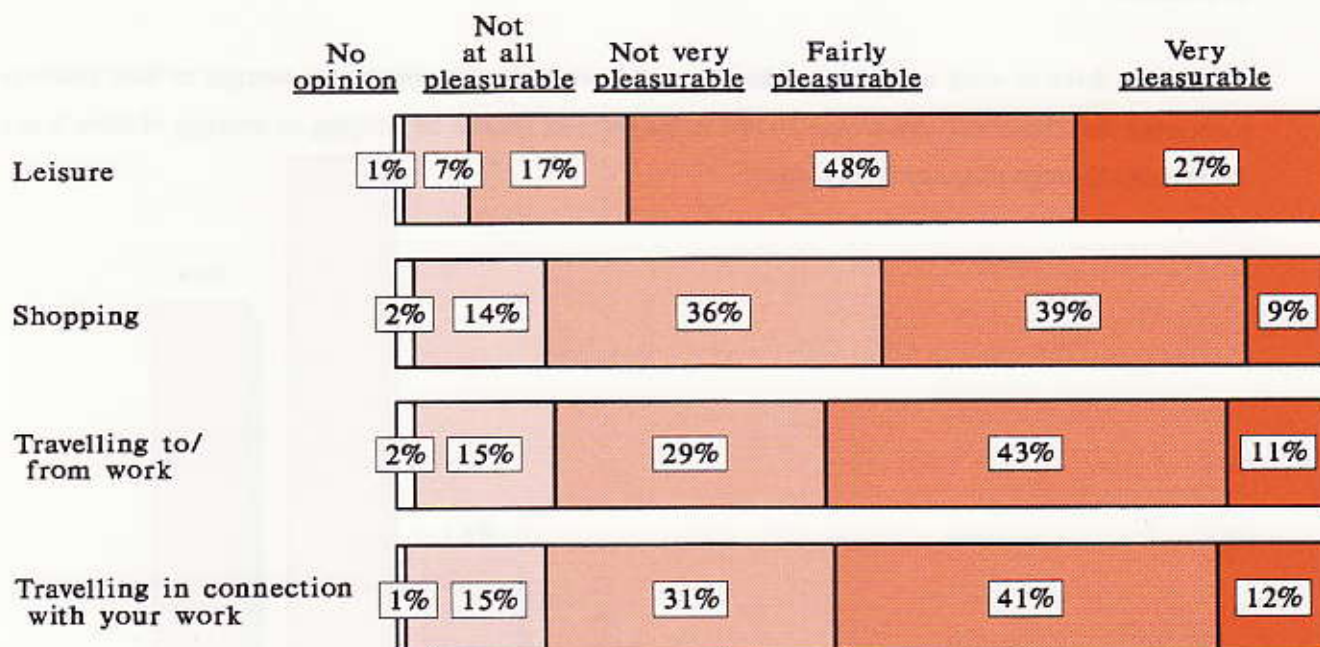
How Pleasurable is Driving?

Driving for some purposes is clearly more pleasurable than for others. Three out of four drivers find driving for leisure purposes either very (27%) or fairly (48%) pleasurable, whereas only around half of those who drive to do their shopping or to travel to/from work or in connection with their work find it a pleasurable experience.

Young drivers are consistently more likely to regard driving as very pleasurable but particularly when done in connection with their leisure activities – 45%, compared with 27% overall. While frequency of travel has little effect on its enjoyment for travelling to and from work, in connection with work, or shopping, those who drive most days in connection with leisure activities (where presumably they have more freedom of choice), are far more likely than average to regard the experience as very pleasurable (36%).

How Pleasurable is Driving?

Q How pleasurable do you find driving for . . . ?



"Very Pleasurable"

	Leisure %	Shopping %	Travel to/ from work %	Travel in connection with your work %
All	27	9	11	12
Male	27	8	10	11
Female	26	10	13	13
17-24	45	11	14	20
25-34	25	10	8	8
35-54	26	9	12	12
55-64	20	8	11	12
65+	21	7	13	11
Young, single males	48	8	12	24
Company car	23	9	7	6
Private car	27	9	12	13
Drive for each 'most days'	36	11	12	12

Base: Drive for each at least 1/month

Source: Lex Report on Motoring 1991/MORI

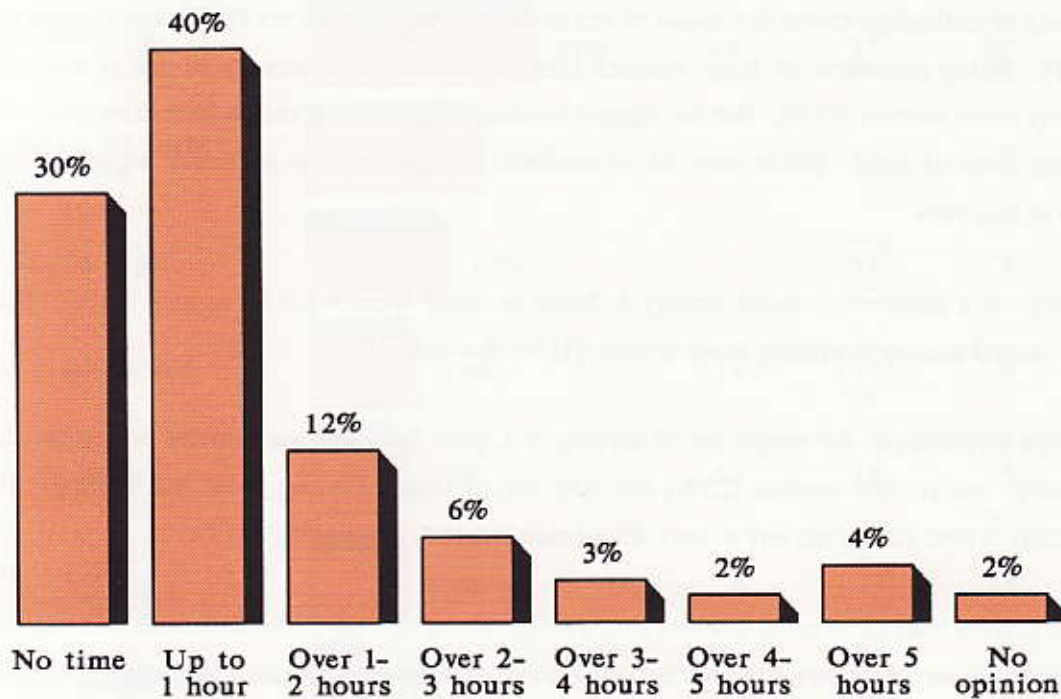
DELAYS DUE TO CONGESTION

The average driver reckons on adding an average hour and a half a week to their journeys because of traffic congestion although this varies from a low of 1 hour 10 minutes in Scotland to 1 hour 40 minutes in London.

Those who drive to work most days reckon they add two hours ten minutes on average to their journeys each week and those who drive over 20,000 miles per year reckon on wasting an average of three hours ten minutes through congestion each week.

Delays Due to Congestion

Q In an average week how much time in total, would you say, is added to your journeys because of traffic congestion when driving your car?



Mean Time per week

All drivers	1 hour 30 minutes
London	1 hour 40 minutes
Scotland	1 hour 10 minutes
Drive to work most days	2 hours 10 minutes
Drive 0-6,000 miles	1 hour
6,001-20,000 miles	1 hour 35 minutes
Over 20,000 miles	3 hours 10 minutes

Source: Lex Report on Motoring 1991/MORI

CAUSES OF ANXIETY

Drivers were asked which of a list of driving situations caused them particular anxiety as a driver. The most widely nominated, by 38%, was breaking down on the motorway. However, this, like most of the situations considered, was considerably more likely to be a cause of anxiety to women (55%) than to men (26%).

Driving in unfamiliar towns is a cause of anxiety to one in three drivers (31%) and slightly more women (37%). Being overtaken by large vehicles such as lorries causes anxiety to one in four (24%) and to slightly more women (27%). But the biggest contrast between men and women drivers is with respect to driving alone at night. While only 3% of men said this causes them particular anxiety, 42% of women were of this view.

Driving on a motorway caused anxiety to twice as many women (22%) as men (11%). Driving in the dark caused anxiety to slightly more women (16%) than men (11%).

Perhaps surprisingly, the simple act of parking in a space between two vehicles causes particular anxiety to nearly one in four women (23%) but only 6% of men. Driving a car that is bigger than the one normally driven causes anxiety to only 4% of men but 13% of women.

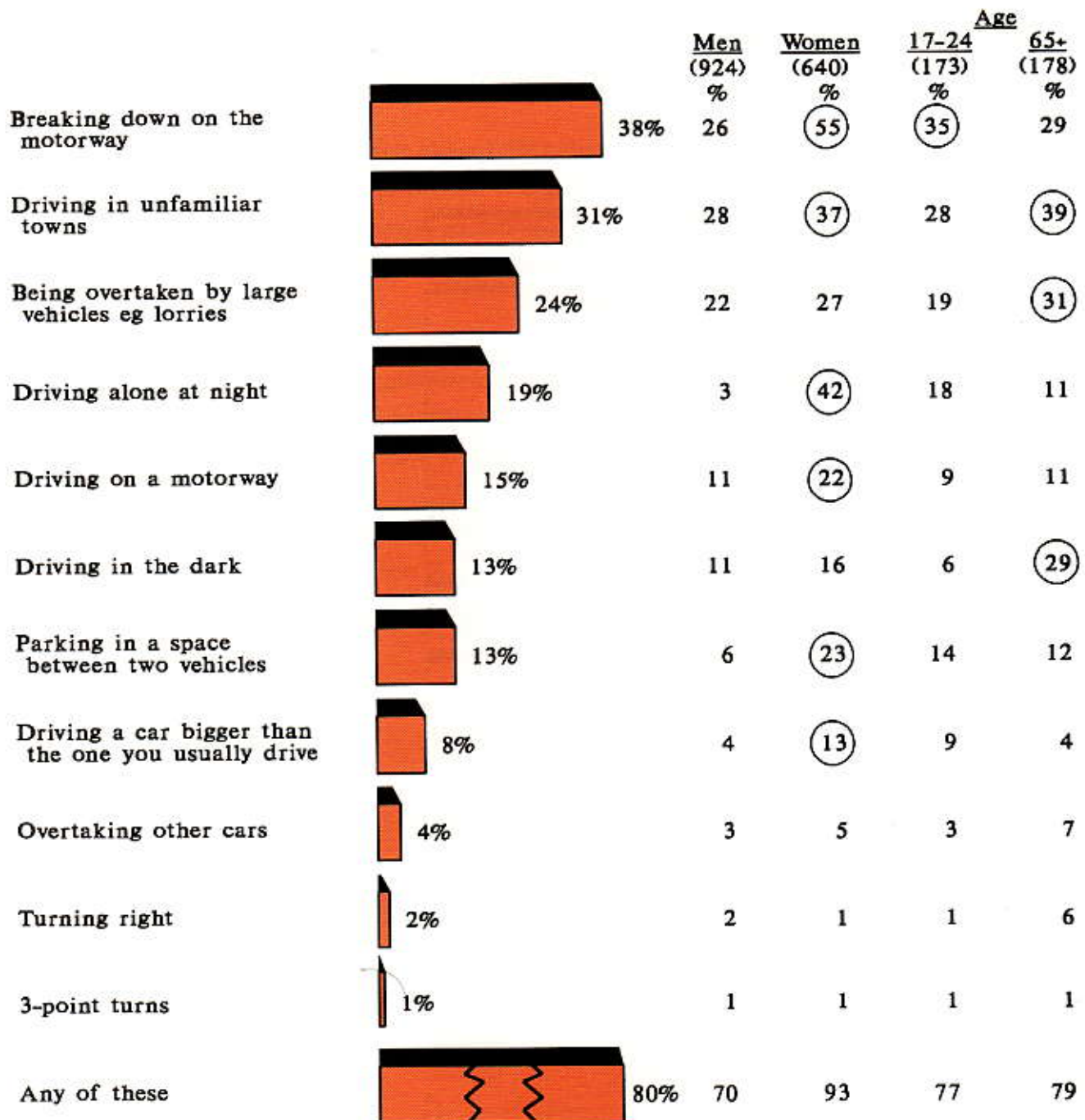
Older drivers tend to be more anxious than average about driving in the dark with 29% saying this was a particular cause of anxiety although breaking down on motorways caused less anxiety to this group than any other age group, perhaps because they are less likely to drive on motorways.

In the table opposite those groups which stand out as being markedly more likely than average to find each experience a particular cause for anxiety, have been circled.

Lex Report on Motoring 1991

Causes of Anxiety

Q Which of these, if any, cause you particular anxiety as a driver?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

CAUSES OF ANGER AND STRESS

When we asked which of a list of things people did made them angry or stressed, the most commonly selected was drivers who drive too close to the car in front: 70% of drivers selected this type of behaviour.

Drivers who fail to signal their intention clearly (56%), cut in sharply after overtaking (44%), and who have children in their cars apparently not wearing seat belts (41%), are also widespread causes of anger and stress. At least one in three were also aggravated by drivers who drive too slowly for the road conditions (39%), drive in the fast lane of motorways and will not pull over for faster cars (34%), and also overtake on the inside lane of a motorway (34%).

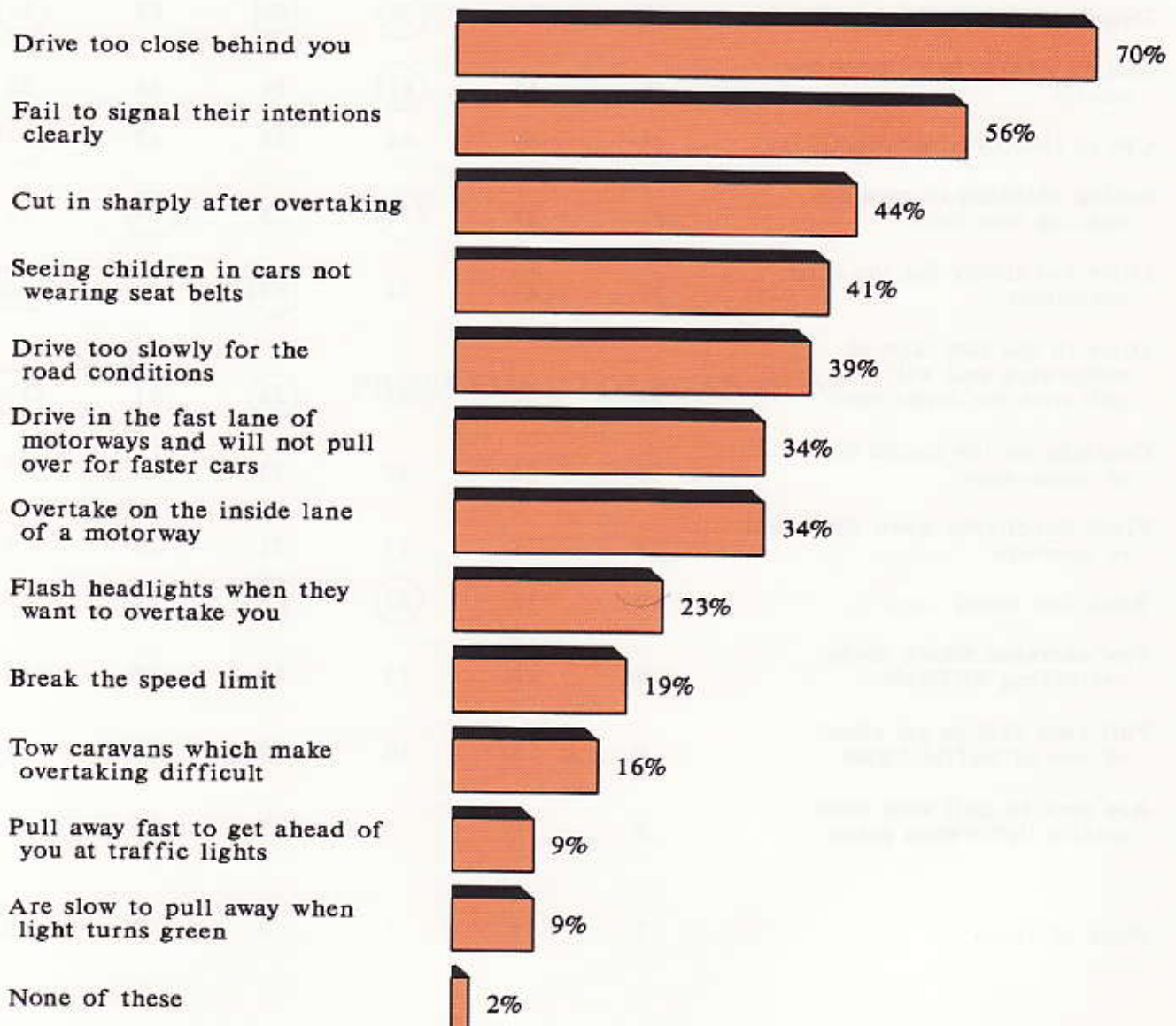
Women are more angered by seeing children in cars not wearing seat belts (53%) than men (32%), by drivers who drive too close behind (76% women, 66% men), who fail to signal their intentions clearly (61%, 52%) and who flash their headlights when they want to overtake (27%, 21%).

In the table overleaf those findings which indicate that the respondents in each sub-group are markedly more likely than average to find each item a particular cause of anxiety, are circled, while those indicating that the sub-group is markedly less likely than average to find each item a particular cause for anxiety, is boxed.

Causes of Anger and Stress (I)

Q Here is a list of things which some people have said make them angry or stressed when they drive. Which, if any, of these make you angry or stressed up?

Drivers who . . .



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

Causes of Anger and Stress II

Base:	Age					
	All (1564) %	Male (924) %	Female (640) %	Young, single male (61) %	17-24 (173) %	65+ (178) %
Drive too close behind you	70	66	(76)	(59)	68	(75)
Fail to signal their intentions clearly	56	52	(61)	54	64	52
Cut in sharply after overtaking	44	44	44	43	42	(54)
Seeing children in cars not wearing seat belts	41	32	(53)	23	(34)	25
Drive too slowly for the road conditions	39	(43)	34	(67)	51	(28)
Drive in the fast lane of motorways and will not pull over for faster cars	34	37	31	(52)	41	(25)
Overtake on the inside lane of motorways	34	35	32	33	28	37
Flash headlights when they want to overtake	23	21	27	21	23	19
Break the speed limit	19	16	(23)	(7)	12	23
Tow caravans which make overtaking difficult	16	18	13	16	16	18
Pull away fast to get ahead of you at traffic lights	9	8	10	8	9	11
Are slow to pull away once traffic lights turn green	9	10	7	15	14	11
None of these	2	3	1	3	2	3

Source: Lex Report on Motoring 1991/MORI

PROBLEMS WITH ROAD SIGNS

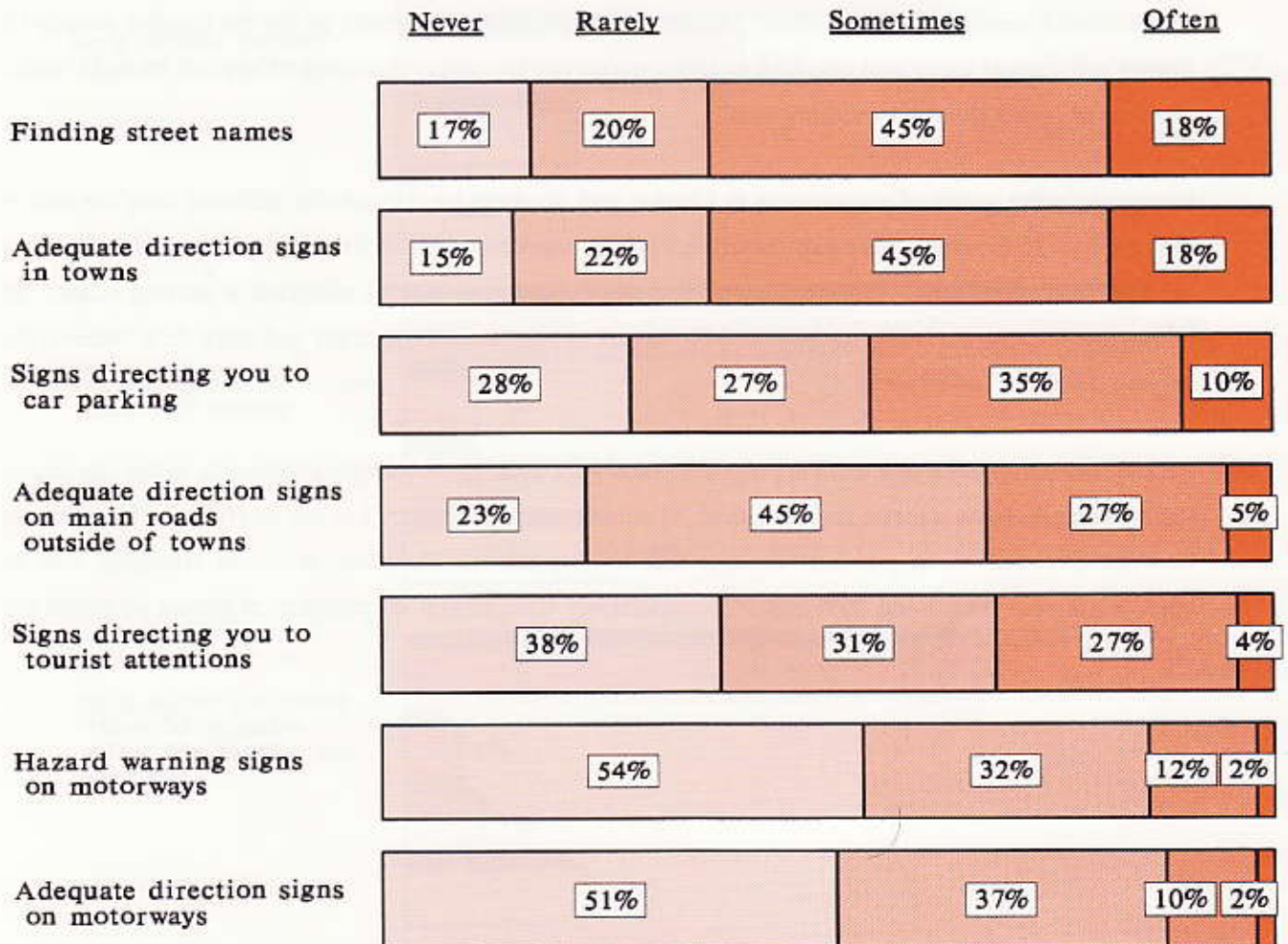
PROBLEMS WITH ROAD SIGNS

Drivers were asked to say how often they have difficulty with different types of road signs. Most difficulty, it seems, is experienced with direction signs in towns and street names. Nearly two out of three drivers (63%) often, or sometimes have problems with each of these. Nearly half (45%) have a similar level of difficulty with signs directing them to car parking.

Adequate direction signs on main roads outside of towns and signs directing you to tourist attractions are sometimes, or often a problem to one in three (32% and 31% respectively). The best signs, apparently, are to be found on motorways. Only two per cent say they often have a problem with hazard warning signs on motorways and adequate direction signs on motorways and a further 12% and 10% respectively sometimes have such problems.

Problems with Road Signs

Q Please tell me how often you feel you have problems with each of the following?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

LEX
SERVICE

LAW BREAKING AND TRAFFIC CONTROL

Penalties for Parking Offences

Drivers are keener on the use of parking tickets for a range of motoring offences than some of the harsher alternatives.

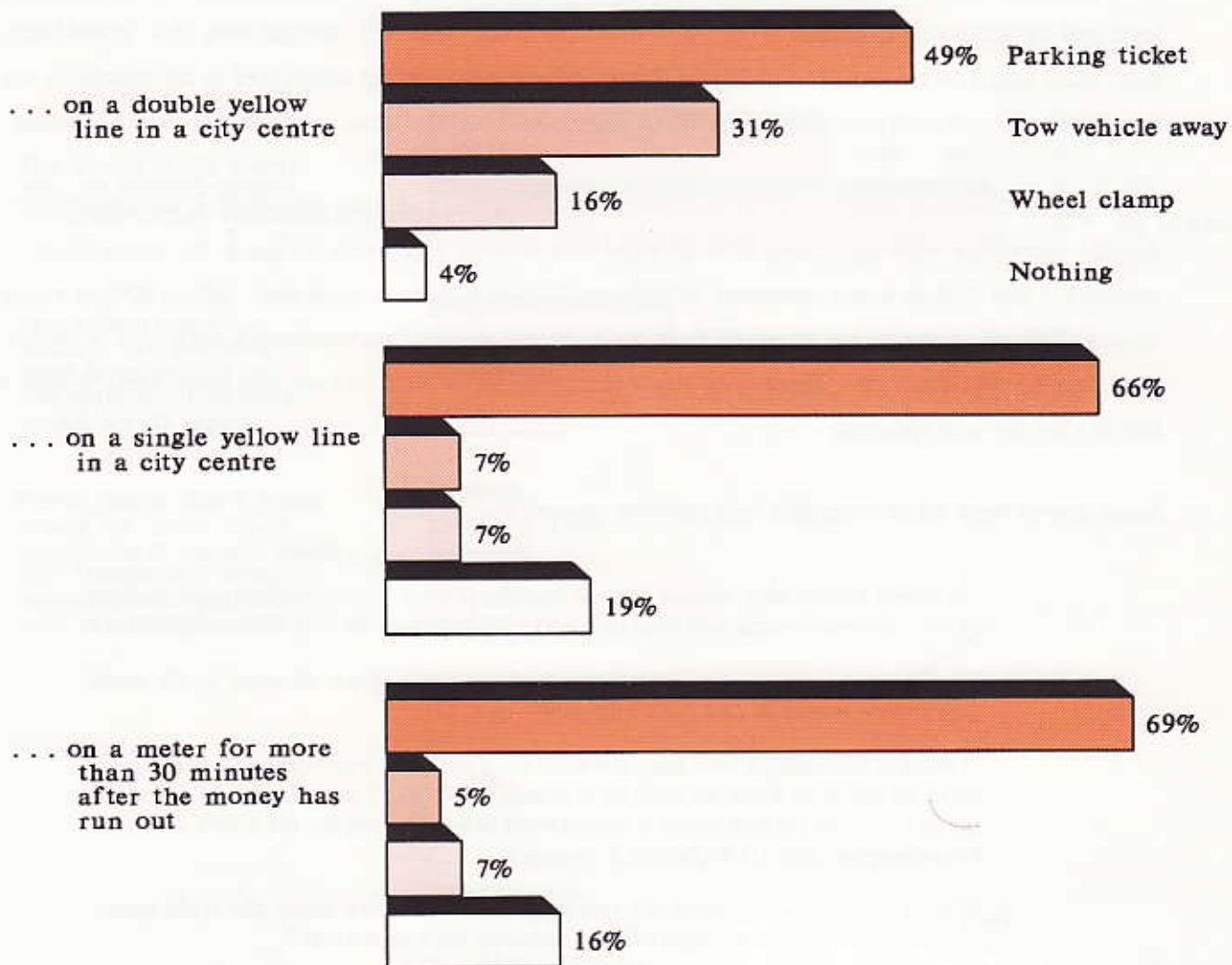
Half the drivers interviewed (49%) believe that motorists who park on a double yellow line in a city centre should receive a parking ticket, although one in three (31%) would go for the tougher penalty of towing the vehicle away and one in six (16%) would opt for wheel clamping. Only 4% thought traffic wardens or police should do nothing at all.

Interestingly the views of respondents in London and Scotland were markedly different than the rest of the country. In London nearly half the drivers (46%) interviewed opted for towing the vehicle away as a penalty for double yellow line parking while only one in three (32%) preferred a parking ticket. In Scotland the priorities were reversed: 64% would opt for a parking ticket and only 22% believe the vehicle should be towed away.

Parking tickets are seen as a more appropriate penalty for parking on a single yellow line in the city centre (66%), or parking on a meter for more than 30 minutes after the money has run out (69%). In each case between five and seven per cent thought that towing the vehicle away or wheel clamping was an appropriate punishment and 19% and 16% respectively thought that no punishment should be meted out at all.

Penalties for Parking Offences

Q Which of these do you think a traffic warden or police should do if a car is parked . . . ?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

LAW BREAKING AND TRAFFIC CONTROL

Penalties for Parking Offences

Drivers are keener on the use of parking tickets for a range of motoring offences than some of the harsher alternatives.

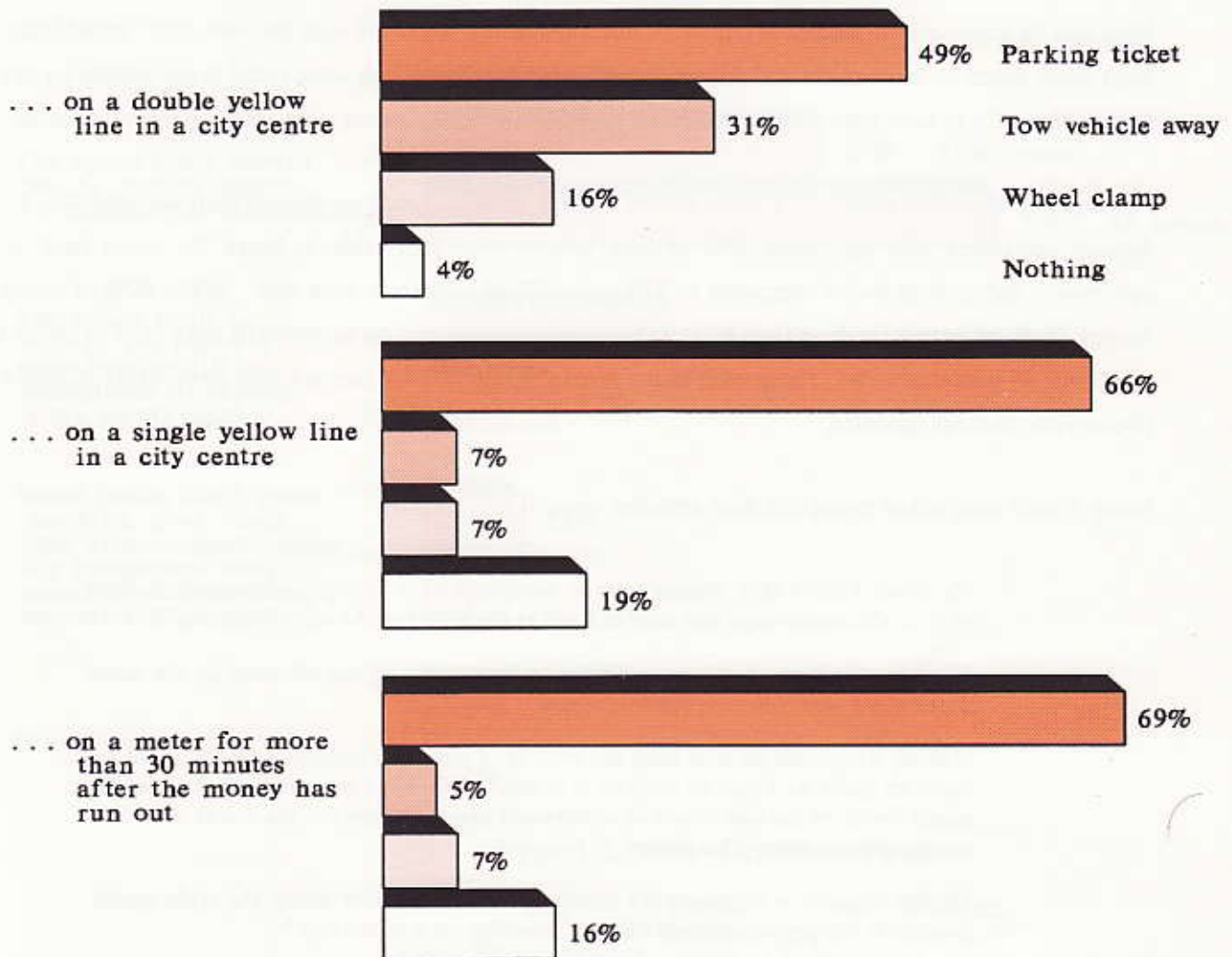
Half the drivers interviewed (49%) believe that motorists who park on a double yellow line in a city centre should receive a parking ticket, although one in three (31%) would go for the tougher penalty of towing the vehicle away and one in six (16%) would opt for wheel clamping. Only 4% thought traffic wardens or police should do nothing at all.

Interestingly the views of respondents in London and Scotland were markedly different than the rest of the country. In London nearly half the drivers (46%) interviewed opted for towing the vehicle away as a penalty for double yellow line parking while only one in three (32%) preferred a parking ticket. In Scotland the priorities were reversed: 64% would opt for a parking ticket and only 22% believe the vehicle should be towed away.

Parking tickets are seen as a more appropriate penalty for parking on a single yellow line in the city centre (66%), or parking on a meter for more than 30 minutes after the money has run out (69%). In each case between five and seven per cent thought that towing the vehicle away or wheel clamping was an appropriate punishment and 19% and 16% respectively thought that no punishment should be meted out at all.

Penalties for Parking Offences

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Base: All drivers (1,564)

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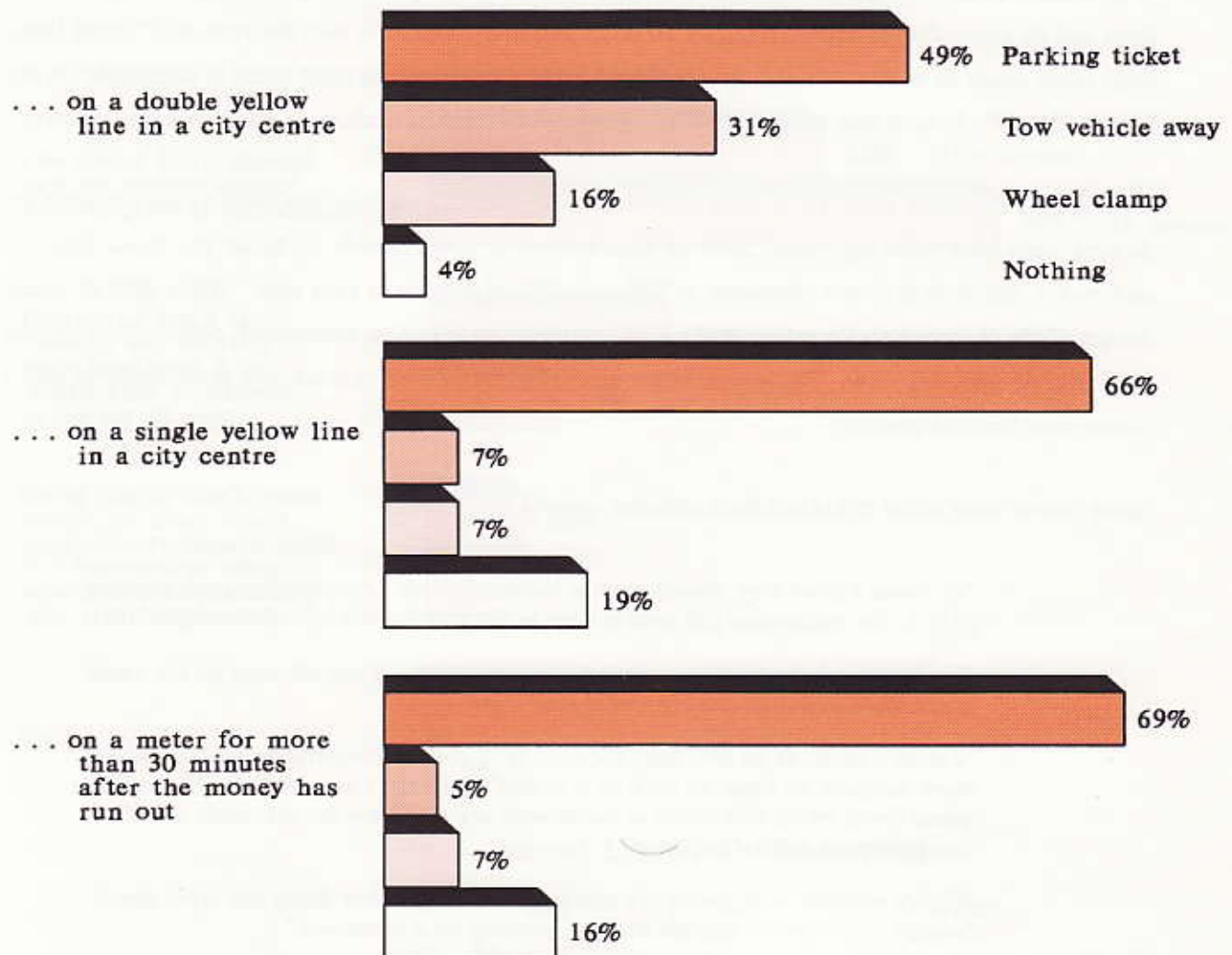
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Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

ATTITUDES TOWARDS SPEED LIMITS

Drivers generally take a more liberal attitude towards observing speed limits on motorways than they do in towns. While 52% take the view that "the speed limit should not be broken except in exceptional circumstances on motorways", 75% take this view with respect to keeping to speed limits in towns.

With respect to motorways, one in three take the view that "the speed limit is usually set below a safe level and its acceptable to exceed it (eg by 10 miles per hour)" and 13% take the view that "speed limits don't mean much on most roads and drivers should judge for themselves what speed is acceptable on any stretch of road". In each case roughly half these proportions take the same view about speeding in towns.

As might be expected, men take a more liberal attitude towards speeding than women and attitudes are directly correlated with age: thus, 53% of men believe it is acceptable to break the speed limit on motorways and 26% in towns compared to 35% and 17% of women in each case. While 60% of young drivers (74% of young single males) think it is acceptable to speed on motorways only 26% of drivers aged over 65 take this view. Those with larger sized engines in their cars are also more likely to take a liberal view towards speeding.

Some drivers were asked to explain their attitudes towards speed limits.

"In towns I think they should keep to the speed limit. People often walk in front of you. On motorways you tend to keep to the speed of the rest of the traffic"

"You cannot keep to it - some have to drive fast. If we all went at the same speed there would be one big traffic jam"

"I think it depends on how busy the road is. I am quite impatient and I like to get there as quick as I can so long as it is safe to do so. I am careful. A lot of the speed limits on certain roads ie motorways are quite low for the roads so it isn't too dangerous to go a bit faster"

"Safety reasons - in towns it's easier to stop if you are doing the right speed. Seventy is dangerous enough without speeding on a motorway"

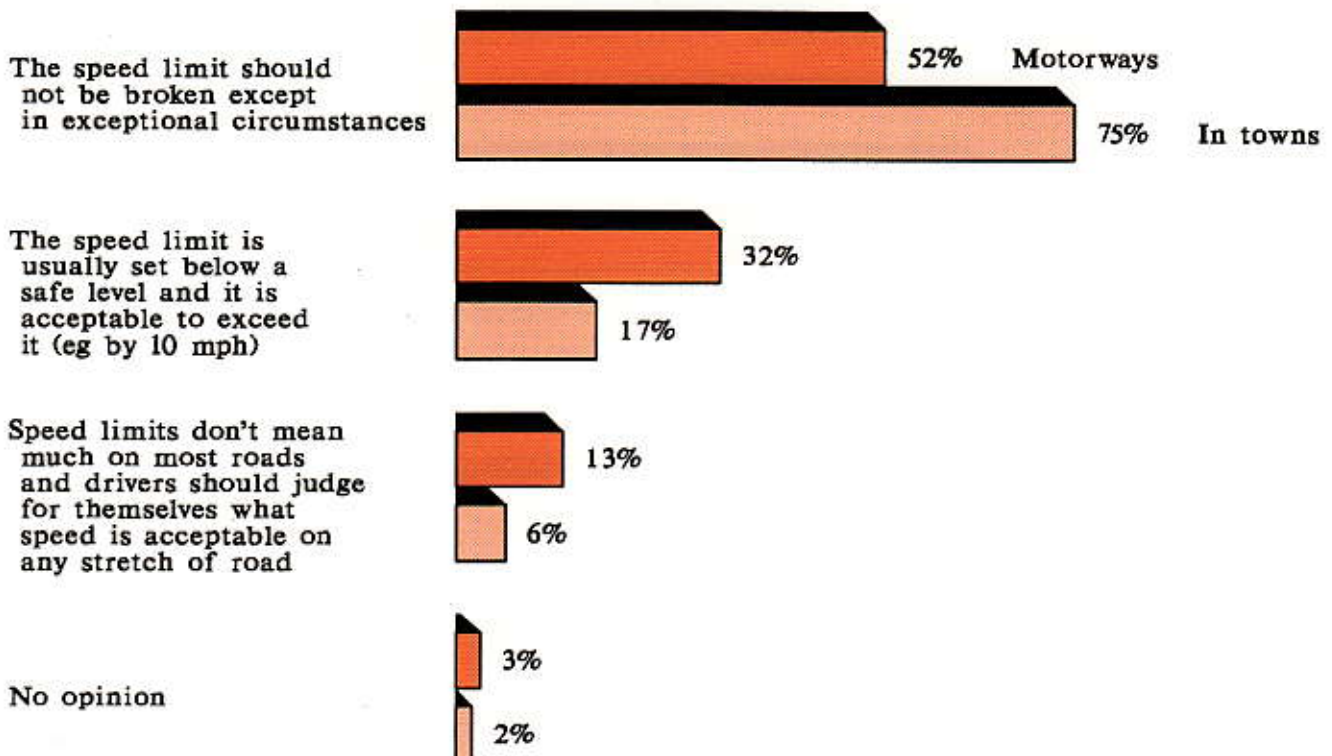
"I think there has to be some structure for people to adhere to because it's to do with safety, the rules are there to be kept to"

"If it's a clear day with good driving conditions and there was no-one near you, you could go at 80mph no problem, but it would depend on driving conditions being good. There are too many hazards in town eg parked vehicles people could walk out from. You have to be more alert and able to stop quickly in town"

Attitudes Towards Speed Limits

Q Which of these describe your attitude towards keeping to the speed limit on motorways?

Q And which of these best describe your attitude to keeping to the speed limit in towns?



Speed Limits On Motorways . . .

	Sex			Young, single	Age				
Base:	All (1564) %	Male (924) %	Female (640) %	male (61) %	17-24 (173) %	25-34 (409) %	35-54 (629) %	55-64 (175) %	65+ (178) %
Should not be broken	52	45	63	25	37	48	53	59	69
Acceptable to speed	45	53	35	74	60	50	45	39	26

Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

MEANS OF TRAFFIC CONTROL

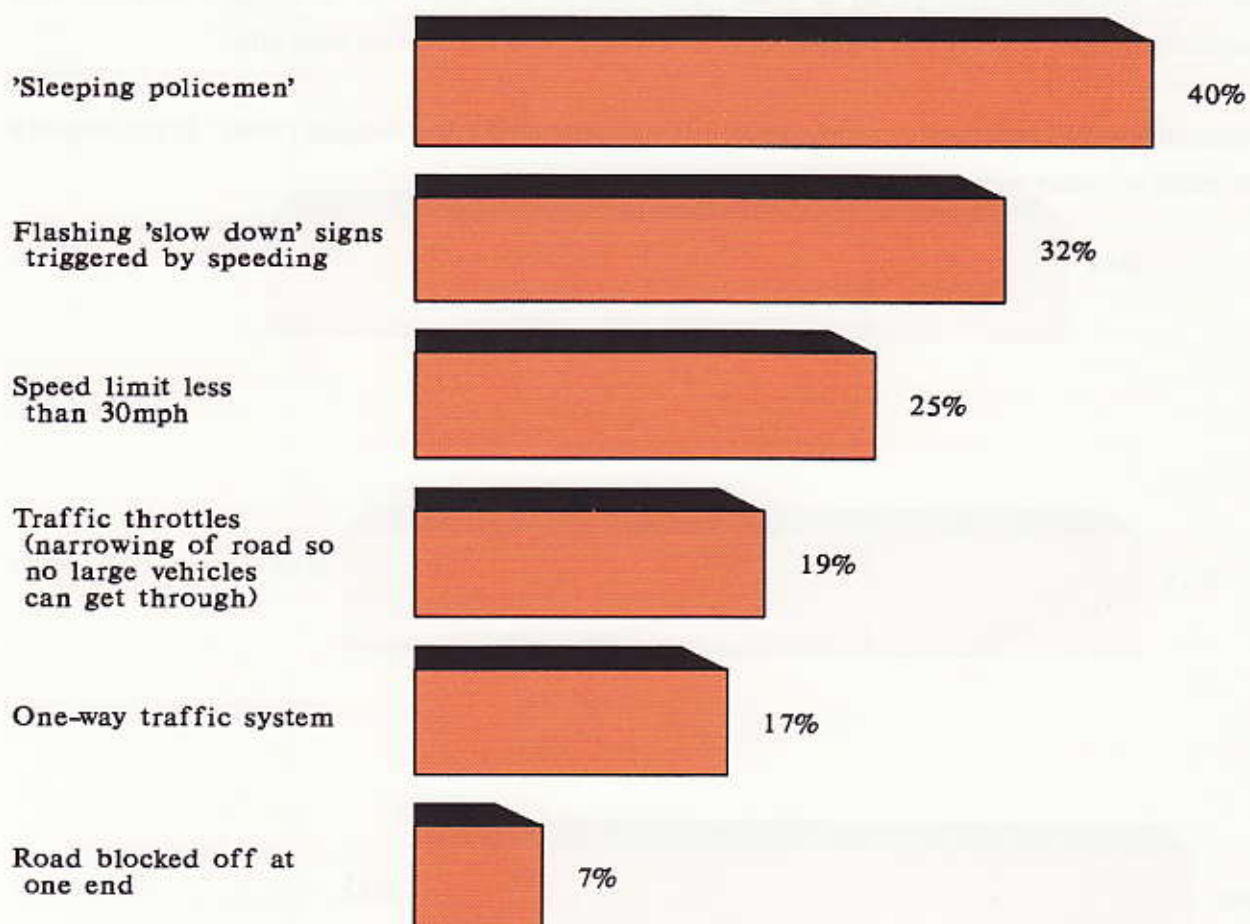
Drivers were asked which of a list of traffic control measures should be used more widely to control traffic in residential areas in the towns where they live.

The most popular enhancement to traffic control was to introduce 'sleeping policemen'. Four out of ten (40%) of drivers felt these should be introduced in the towns where they lived. There was also fairly widespread support for a number of other measures. One in three (32%) favoured the introduction of flashing 'slow down' signs triggered by speeding, one in four would welcome speed limits of less than 30 mph and one in five (19%) traffic throttles. Slightly fewer felt one way traffic systems would be a good idea. Only 7% favoured blocking of roads at one end.

Overall, 89% favoured the wider use of at least one of the suggested traffic controls in residential areas in the towns where they lived.

Means of Traffic Control

Q Which, if any, of these do you think should be used more widely to control traffic in residential areas in the town where you live?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

TRANSPORT POLICY

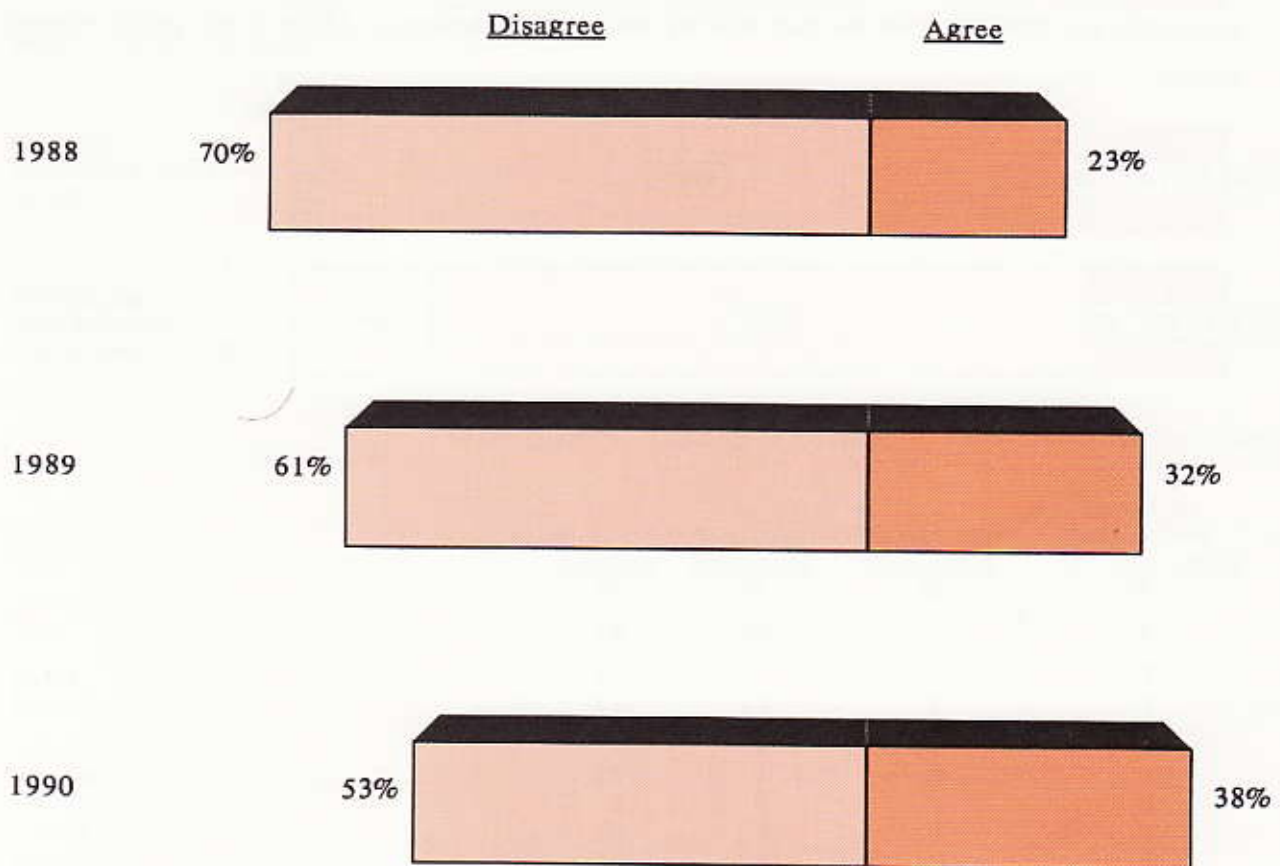
Attitudes towards Public Transport

The third annual survey for the Lex Report on Motoring has shown a continued trend towards being sympathetic to the use of public transport. In this year's survey, four out of ten (38%) of drivers agreed with the view "I would use my car less if public transport were better", compared with one in three (32%) in 1989 and one in four (23%) in 1988. Nonetheless, 53% continued to disagree with this view particularly those in the North of England (59%) and those who use their car most often.

Interestingly, in London, more people agree with this view (48%) than disagree (44%). In this respect it is unlike any other region.

Attitudes to Public Transport

Q "I would use my car less if public transport were better"



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

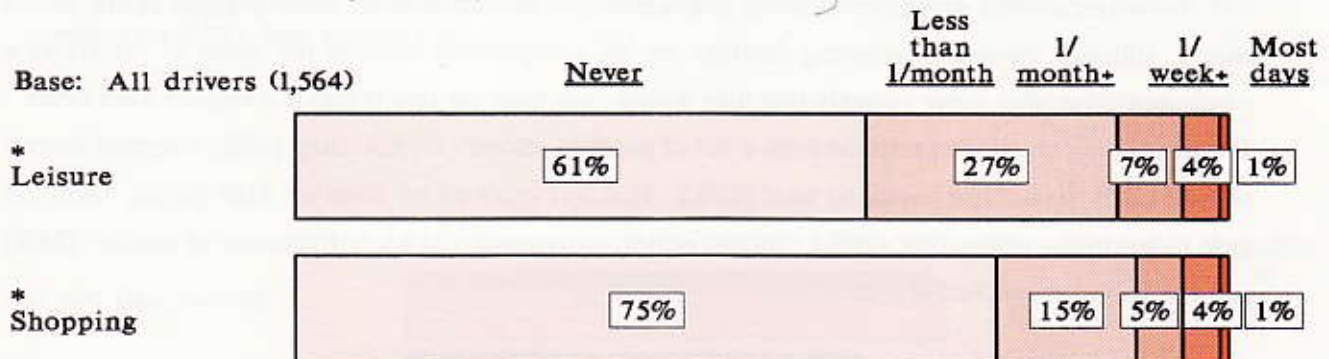
USE OF PUBLIC TRANSPORT

Despite increasing support for the idea of using public transport, drivers do not currently make a great deal of use of it. Of those who work full and part time, only 9% use public transport for travelling to and from work even once a month, and only 6% use it with this frequency in connection with their work.

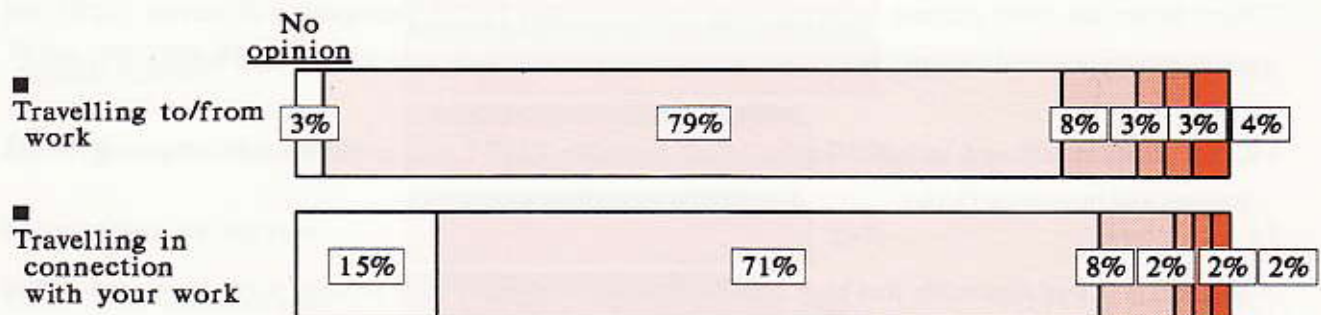
Among drivers as a whole, public transport is only slightly more likely to be used for leisure (12%) once a month or more, or for shopping (10%). Women who shop are more likely to use public transport than men who shop but in other respects the aversion to public transport seems much the same. Young drivers are more inclined than average to use public transport for leisure and travelling to and from work and those who use their car least for each activity are not overwhelmingly likely to use public transport instead.

Use of Public Transport

Q How often do you personally use buses, coaches, trains or the underground for each of the following nowadays?



Base: Those working full/part time (1,114)



Use public transport once a month or more for:

	* Leisure %	* Shopping %	■ Travel to/ from work %	■ Travel in connection with your work %
All	12	10	9	6
Male	12	7	9	7
Female	11	13	8	3
17-24	24	14	17	4
25-34	10	8	9	6
35-54	9	8	8	6
55-64	10	7	6	1
65+	14	15	5	5
Young, single males	25	13	14	6
Private car	12	10	4	9
Company car	12	5	6	4
Those who drive once a week or more for each	11	9	7	7
Those who drive less than once a month for each	15	12	18	4

Base: * All drivers (1,564)

■ Work full/part time (1,114)

Source: Lex Report on Motoring 1991/MORI

REASONS FOR NOT USING PUBLIC TRANSPORT

The reasons most often given for not using public transport instead of their car are perhaps as one would expect, although the most interesting findings are the comparisons between the views of drivers as a whole and those who agree strongly that they would "use their car less if public transport were better". The most common reasons selected from a list of possible answers for not using public transport instead of their car is 'do not like having to wait' (32%). This was followed by 'fares too high' (28%), 'takes too long to get to the destination' (28%), 'desired routes not covered' (24%), 'infrequency of service' (24%) and unreliable/unpunctual service (22%).

Interestingly, however, those who are positively orientated towards using their car less if public transport were better are most inclined to stress fares being too high (39%), infrequency of service (34%) and unreliable/unpunctual service (34%), over which transport managers have a fairly high degree of control.

Other items mentioned included inconvenient timetable (20%) and inconvenience of getting to the stations and bus-stops (15%).

In London it was noticeable that high fares were rather less likely than average to be mentioned - 22% compared with 28% overall - while unreliability (31%) and being too crowded (26%) were markedly more likely to be mentioned.

When asked to express their views in their own words, the following were mentioned:

"Never given it a thought, I like driving, I have always had my car. I would never consider public transport, the car is always there, a matter of habit I suppose"

"Public transport is not reliable and it's easier and quicker to use the car. Public transport is dirty, it's not comfortable and too many people are smoking"

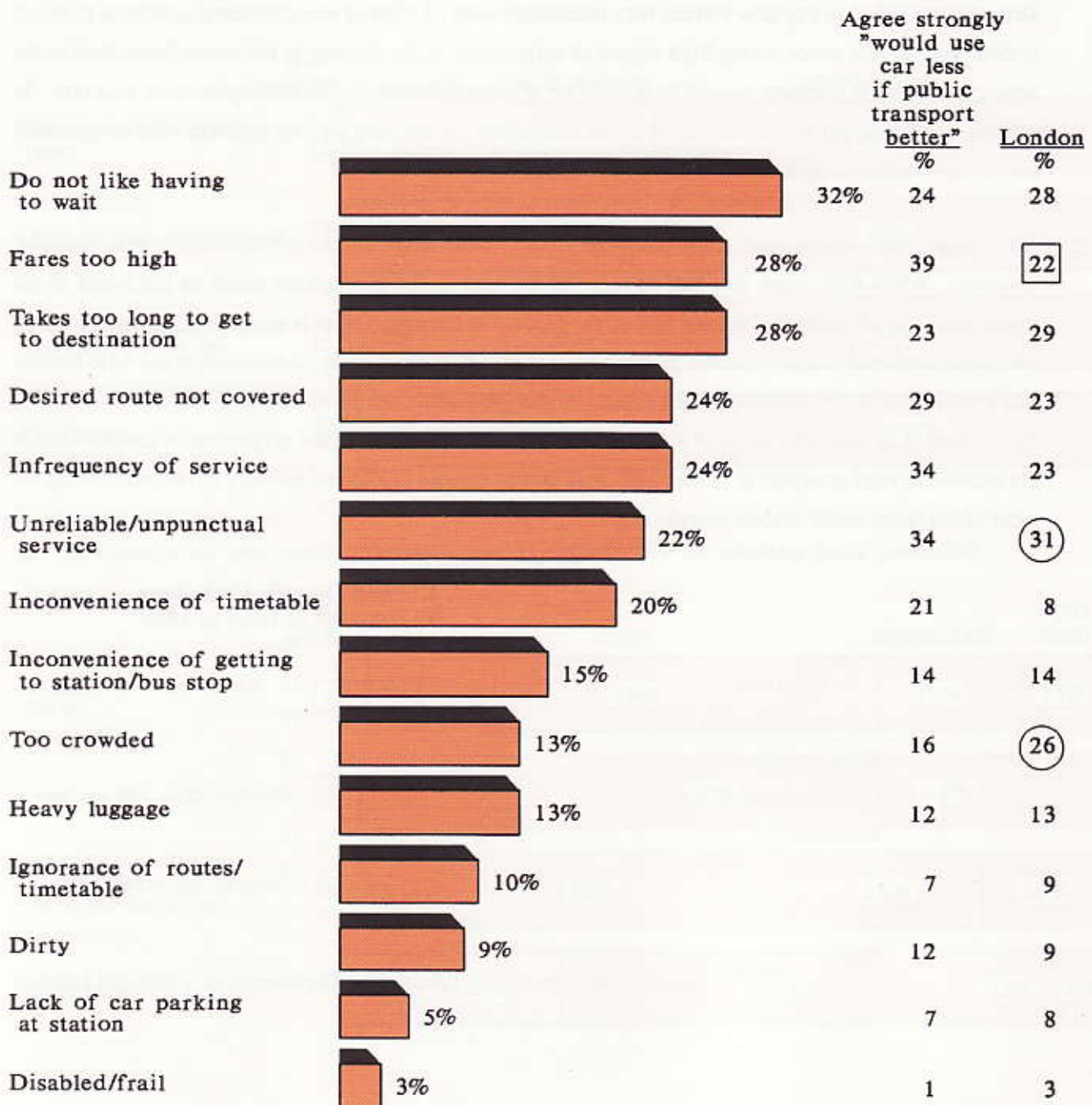
"It is just hanging about waiting for them to come and having to be there at a certain time. It is getting as expensive as petrol and car parking is getting better"

"One, I can't be bothered, and two, I think buses smell and are dirty because of smokers and everything. I don't like waiting at bus stops and if I want to go anywhere I can always get hold of a car"

"We are off the bus route. It's a fair walk, especially in bad weather. If it was more convenient I would use it, especially for the town centre. You can't always rely on the buses arriving on time"

Reasons for Not Using Public Transport

Q Here are some reasons people have given for not using public transport instead of their car. Which of these would you say are the main two or three reasons why you don't use public transport more?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

THE ENVIRONMENT AND TRAFFIC CONGESTION

Environmental Problems

Drivers were asked to say how serious they considered each of a list of environmental problems to be. It is clear that drivers attach a very high degree of seriousness to the damage to the ozone layer, lead in the atmosphere, global warming caused by a build up of carbon dioxide in the atmosphere and acid rain. In each case at least half the drivers interviewed considered each a very serious problem and around nine out of ten considered each at least a fairly serious problem.

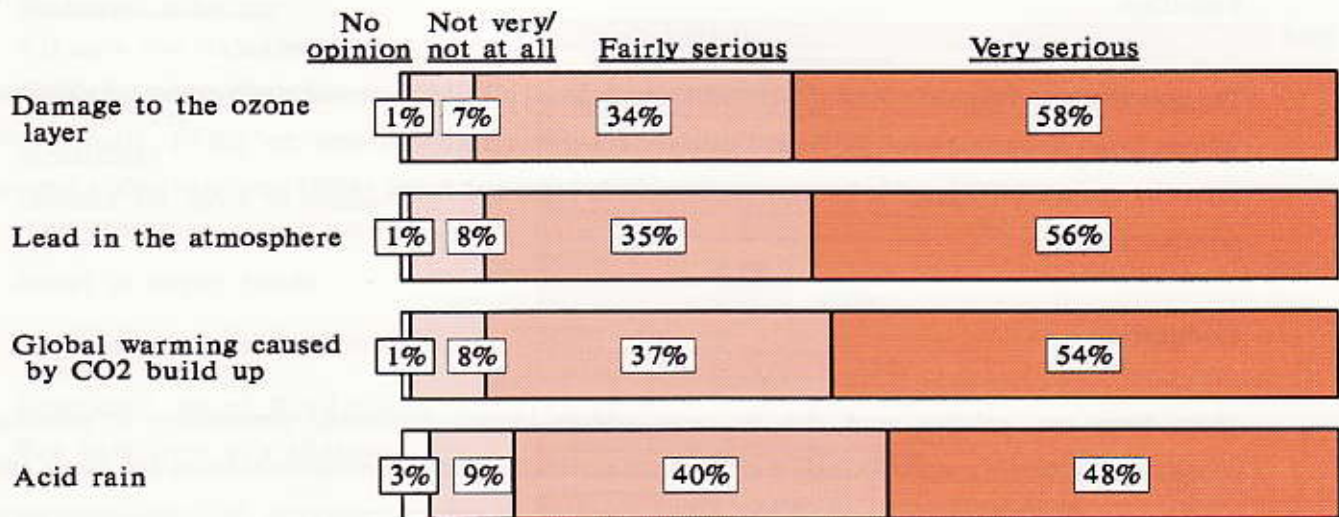
Their perceptions of how much these problems are due to the motor car are not necessarily well-founded, however. While 62% think that half or more of the lead in the atmosphere could be attributed to the motor car, a third (33%) feel at least half of the damage to the ozone layer is car related and nearly one in five (19%) attribute at least half the problem of acid rain to the motor car. Moreover, some 41% believe that at least half of the global warming caused by carbon dioxide can be attributed to the car. Half (52%) are concerned in assuming some of it can be. Government estimates put the proportion of carbon dioxide attributable to road transport at around 18% with power stations (33%) and industry (27%) accounting for most of the 'man-made' carbon dioxide emissions.

	Carbon Dioxide Emissions Percentage of total in 1988
	%
Power Stations	33
Industry/refineries	27
Road transport	18
Commercial/public services	6
Domestic	15
Other	1

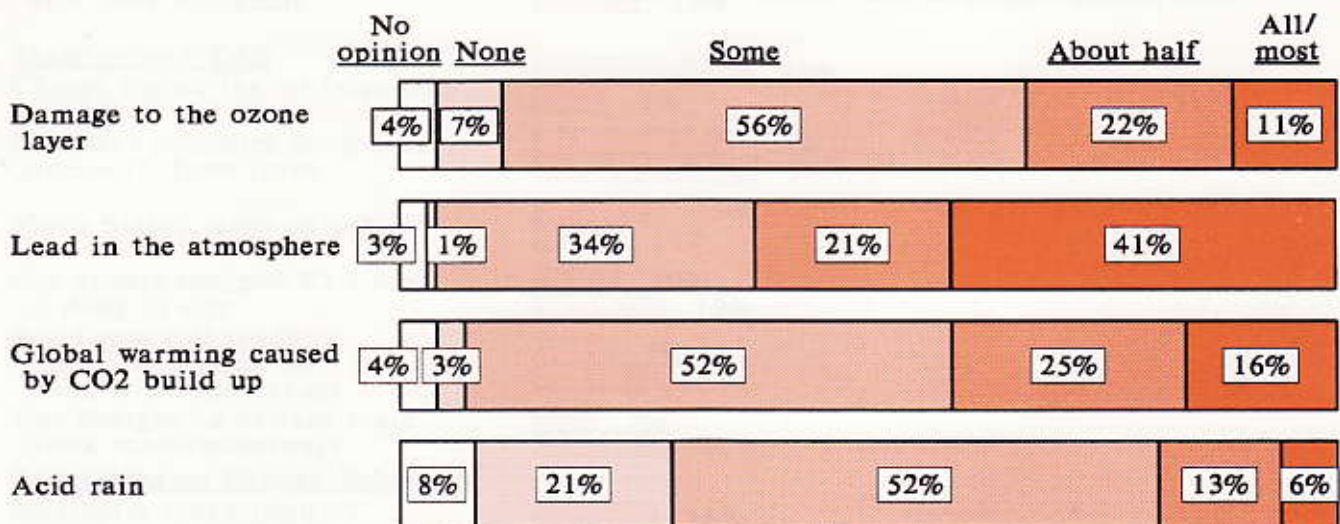
Source: Warren Spring Laboratory, Department of Trade and Industry

Environmental Problems

Q Please tell me how serious you think each of the following environmental problems is?



Q How much do you think the motor car is responsible for causing each problem?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

POLICIES ON POLLUTION AND CONGESTION

Drivers were asked to say which of a list of seventeen policies they felt would help to reduce pollution caused by cars and which would help to reduce congestion on Britain's roads.

Pollution

The policies most frequently identified as likely to reduce pollution were essentially technical solutions 'all cars to use unleaded petrol' (85%) and 'catalytic converters fitted to all new cars' (68%). 'Banning cars from city centres' (40%) and 'a lot more investment in buses and trains' (40%) were also widely seen as possible remedies.

Congestion

These latter two policies were also the most widely identified possible contributors to reducing congestion on Britain's roads. Nearly half (45%) of drivers felt 'more investment in buses and trains' and one in three (35%) 'banning cars from city centres' would help reduce congestion. Widening motorways and main trunk roads' (33%), 'introducing more bus lanes' (31%) and 'investing in better roads generally' (29%) were also widely felt to provide some kind of solution to the problem, but the generally low scores on all policies suggests an almost fatalistic approach to the problem.

Policies on Pollution and Congestion

Q Which of these things do you think would help to reduce pollution caused by cars?

Q And which do you think would help to reduce congestion on Britain's roads?

Technical solutions

All cars use unleaded petrol



Catalytic converters fitted to new cars



Investment

Invest a lot more in buses and trains



Invest in better roads



Wider motorways/main trunk roads



Restricted use of Road Space

Ban cars from city centres



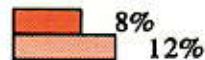
Introduce more bus lanes



Reserve one lane on motorways as a toll lane for heavy commercial vehicles



Lanes reserved for car with two+ occupants



Taxation and Tolls

Charge higher tax on large cars



Increased subsidies for public transport, from taxes



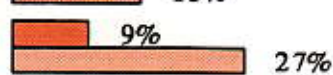
Much higher taxes on petrol



Car drivers charged £3 a day to drive in city



Build new toll roads to relieve congestion on trunk roads/motorways



Toll charges on certain main trunk roads/motorways

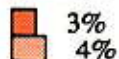


Restrictions on Driving Behaviour

Maximum speed limit of 60mph on main roads



Maximum speed limit of 80mph on main roads



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

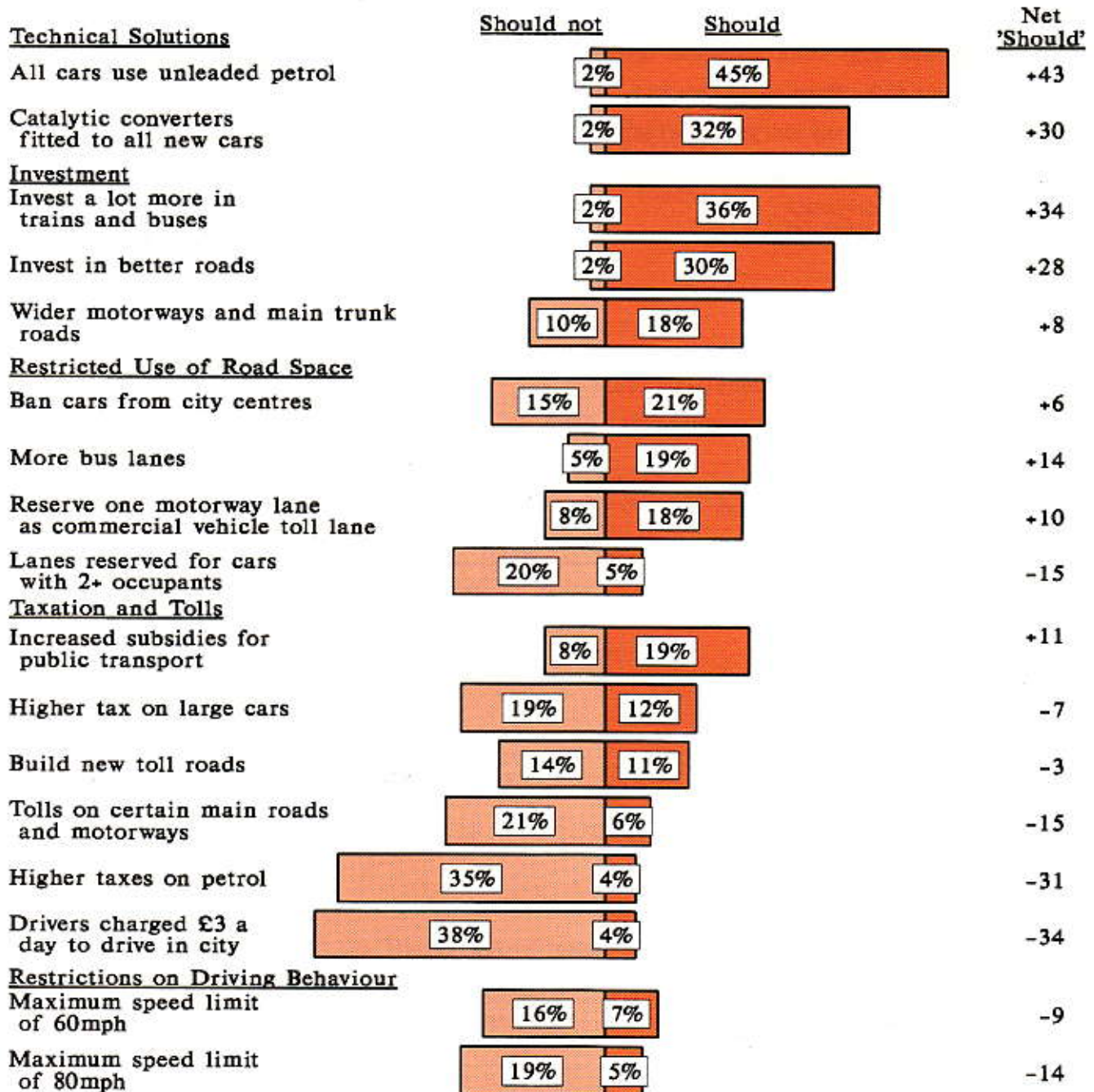
SUPPORT FOR POLICIES

When asked which of the policies should be introduced and which should not, no policy received a majority support, although several received a substantial body of support with hardly any opposition. In particular, 45% supported 'all cars to use unleaded petrol' and only 2% opposed this policy. Thirty-six per cent supported 'investing a lot more on trains and buses' and only 2% opposed this policy. The fitting of catalytic converters to all new cars was supported by 32% and opposed by just 2% and similarly 'investing in better roads' was supported by 30% and opposed by 2%. 'Banning cars from city centres' had a mixed reaction with 21% in favour and 15% opposed.

Least popular policies were those which would directly hit the pockets of the motorist. Thirty-eight per cent opposed car drivers being charged £3 per day to drive into city centres and only 4% supported this policy; 35% opposed 'higher taxes on petrol' while only 4% supported this policy; 21% opposed 'toll charges on certain main trunk routes/motorways' while 5% were in support and 20% opposed to 'lanes being reserved for cars with two or more occupants'.

Support for Policies

- Q Which of these definitely should be introduced to reduce pollution/congestion?
 Q Which of these should not be introduced?



Base: All drivers (1,564)

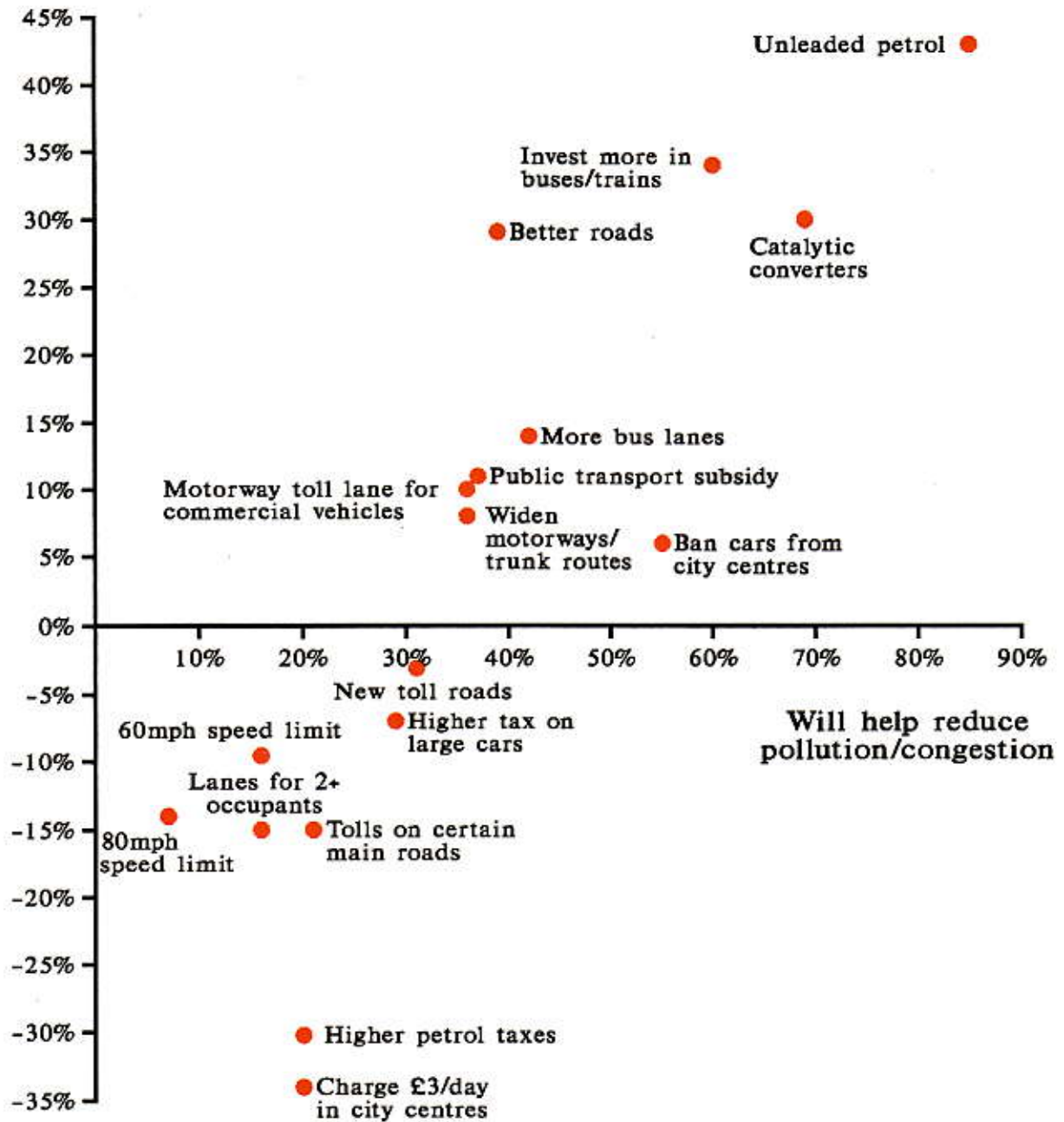
Source: Lex Report on Motoring 1991/MORI

EFFECTIVENESS AND SUPPORT FOR POLICIES

The scatter chart (see opposite) shows the relationship between perceived effectiveness of policies in either reducing pollution or congestion and net support for these policies. The requirement for all cars to use unleaded petrol was both widely seen to be effective, and was widely supported. To a lesser degree so too was large scale additional investment in public transport and the requirement for catalytic converters to be fitted to all new cars. Banning of cars from city centres was widely thought to be effective though only just gained net support. Higher petrol taxes and charging £3 a day to drive in cities were seen to be relatively ineffective and were also strongly opposed.

Policies on Pollution/Congestion Perceived Effect and Desirability

Net 'should'
introduce



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

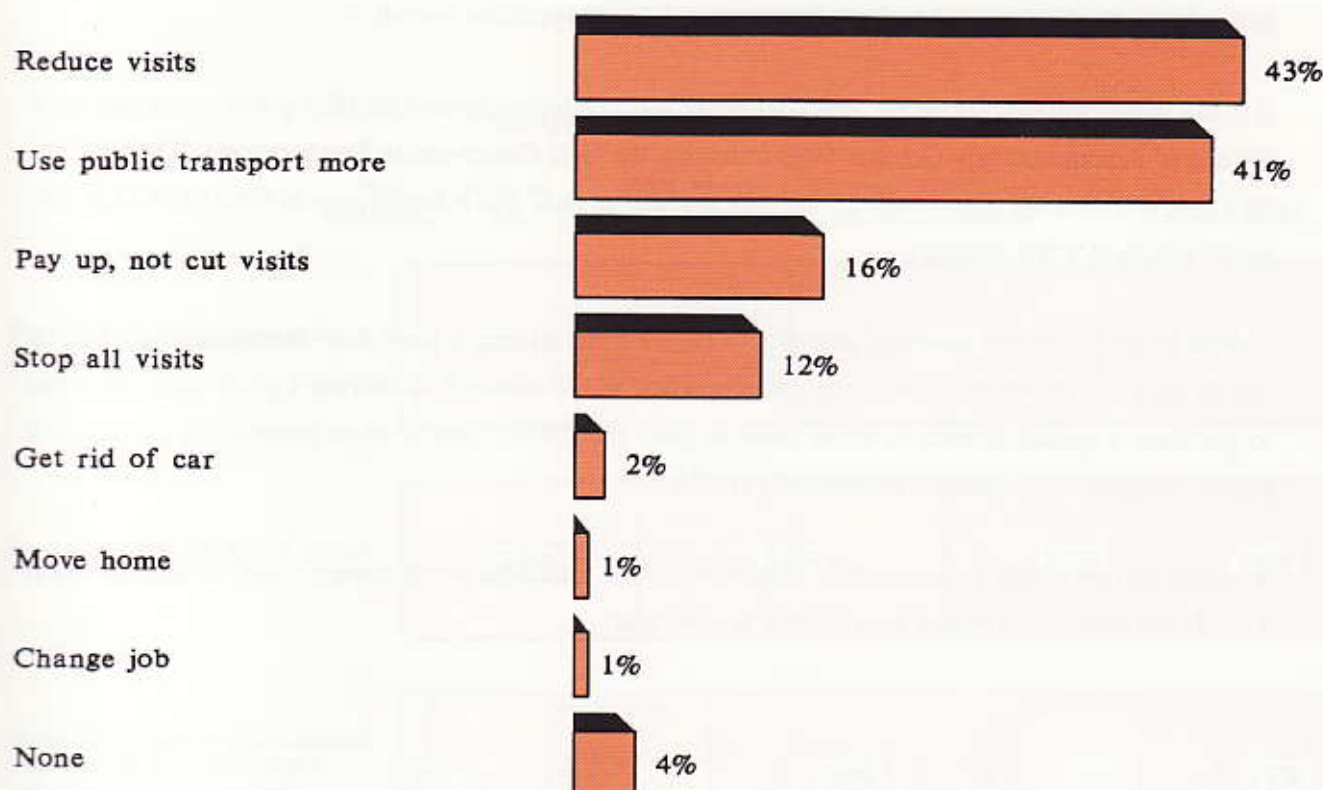
ROAD PRICING

As we have noted above, road pricing is neither popular nor seen to be an effective solution to the problems of either pollution or congestion. Nevertheless, faced with the proposition that such a penalty was introduced, more than nine out of ten drivers believed they would moderate their behaviour in some way. This included around four out of ten who said they would reduce their visits (43%) and a further four out of ten who said they would use public transport more (41%). Only sixteen per cent said they would pay up without cutting their visits, while 12% said they would stop their visits altogether. If we assumed 95% of drivers drive at least five days a week and that on three of these days they drove into a large town or city this could cut the number of cars in these towns and cities by around one million on a typical day. If those who reduced their visits cut them by half this would reduce the number of cars in Britain's major towns and cities by a further two million.

Those who drive into large towns or cities most days would clearly be particularly hit and were also the ones who felt they would be least able to reduce their visits, or to use public transport more and the most likely to have to pay up and bear it.

Road Pricing

Q If road pricing was introduced so that you had to pay £3 every time you drove into any large town or city centre, which, if any, of these do you think you would do?



Drive into large towns/cities

	<u>Most days</u> (291)	<u>1/week+</u> (455)	<u>1/month+</u> (284)	<u>Less often</u> (343)
	%	%	%	%
Reduce visits	36	45	44	43
Use public transport more	34	43	45	41
Pay up, not cut visits	22	16	14	12
Stop all visits	8	11	12	17
Get rid of car	3	2	1	1
Move home	1	1	0	*
Change job	4	1	*	*
None of these	7	5	2	2

Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

EFFECTS OF MEASURES TO REDUCE CONGESTION

Although drivers had previously said they believed much higher petrol prices would not be very effective at reducing either congestion or pollution they nevertheless indicated that a 50% increase in petrol prices would be more effective than other suggested methods, including the banning of cars in local town centres, and supporting public transport substantially. Previous questions had found that policies like the latter two were perceived to be more effective in solving the problem overall.

If petrol prices were increased by 50% (fieldwork was conducted around the time petrol prices peaked at the end of September/early October 1990 following the Gulf Crisis) one in four motorists (25%) believe they would reduce the amount of driving they do 'a great deal' and a further one in three (33%) say they would reduce it 'a fair amount'.

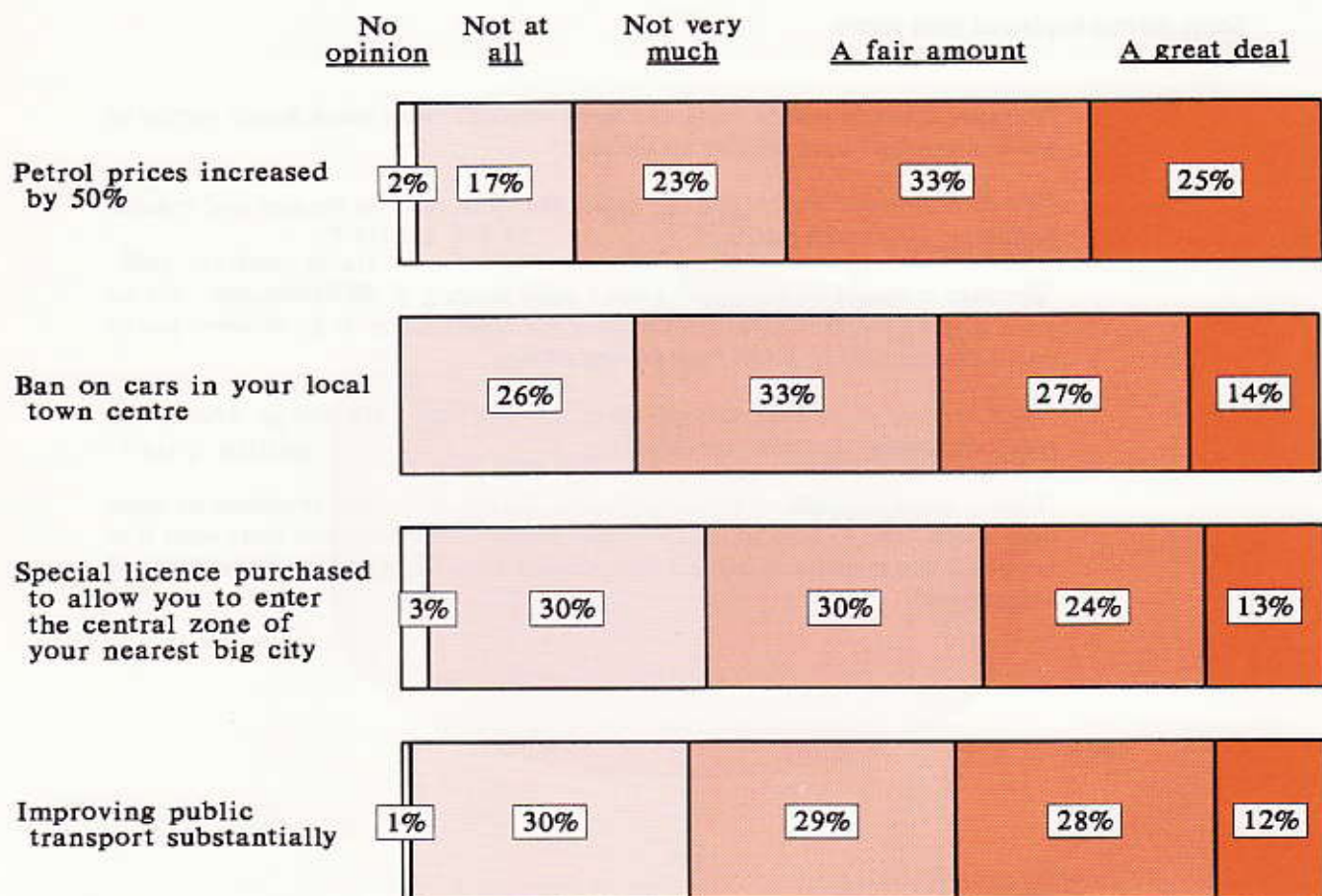
This compared with one in seven who would reduce their driving 'a great deal' in response to a ban on cars in their local town centre and a similar proportion would reduce their driving 'a great deal' if they had to purchase a special licence to allow them to enter the central zone of their nearest city (13%), or if public transport was improved substantially (12%).

Younger drivers would be particularly responsive to the increased petrol charge – one in three (34%) of 17-24 year olds would reduce their driving 'a great deal'.

Effect of Measures to Reduce Congestion

Q If the government introduced each of the following to reduce congestion on Britain's roads, how much do you believe it would cause you to reduce the amount of driving you do?

Would Reduce Amount of Driving . . .



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

CAR SHARING

If someone in their neighbourhood regularly made a road journey by car at the same time and to the same destination as themselves, four out of five drivers (80%) say they would be at best 'fairly willing' to share that journey with them to reduce costs and congestion. However, only one in five (18%) said they would be 'certain' to do so.

Younger drivers were more likely to do so than older drivers (24% 'certain' of 17-24 year olds) and private car drivers (19%) more likely than company car drivers (11%).

Some drivers explained their views:

"Because it would reduce costs and there wouldn't be so much hassle getting to work. I wouldn't have to drive all the time"

"We do it already. Purely one car rather than four reduces the cost and reduces pollution. Helps with parking"

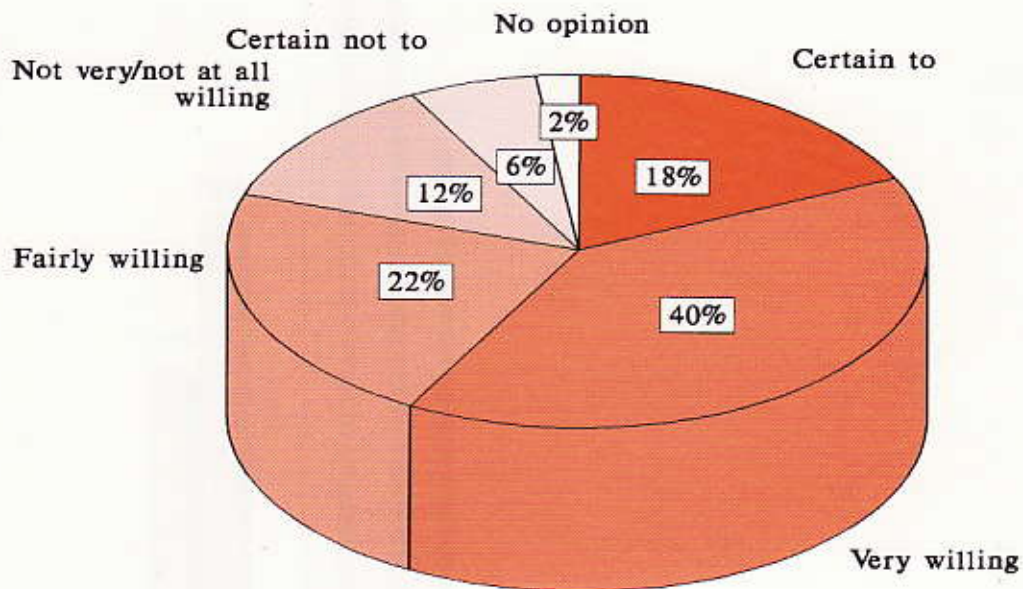
"Because it would be cheaper. I don't mind sharing if it's convenient. It's no good if you have to hang around waiting for others either to go or when you're coming home. It'd be a rest from driving as well"

"Well, we like to be independent, never go to a time. We just go when we're ready and come back when we want"

"It very much depends on the neighbours. It can still create problems as some people don't like to have to wait for other people - although you don't want it to happen it can sometimes happen that you are late - you have to be really good neighbours"

Car Sharing

Q If you found that someone in your neighbourhood regularly made a round journey by car around the same time and to the same destination as you, how willing would you be to share that journey with them to reduce costs and congestion?



Base: All Drivers (1,564)

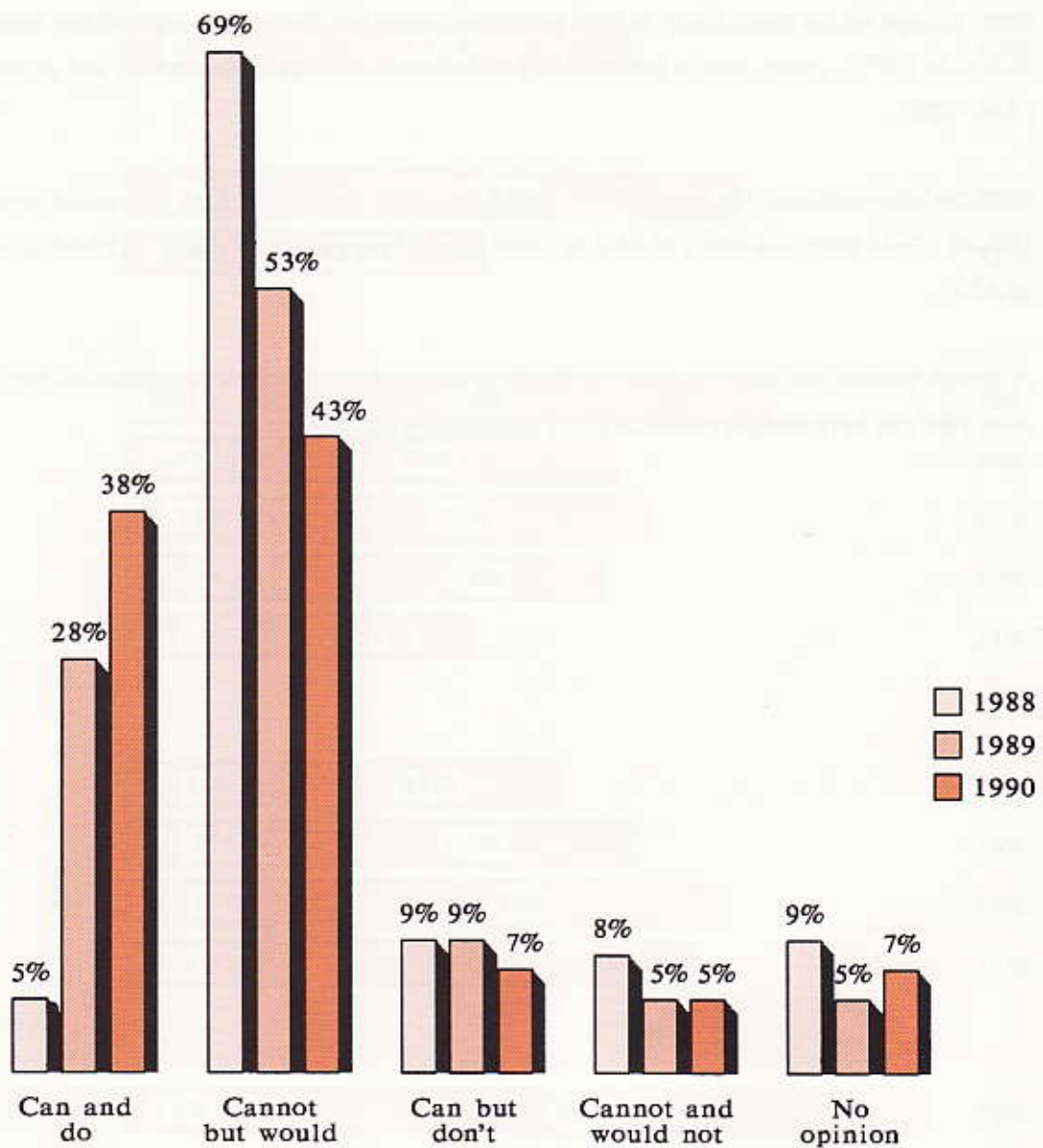
Source: Lex Report on Motoring 1991/MORI

USE OF UNLEADED PETROL

Nearly four out of ten drivers (38%) now claim to use unleaded petrol in their cars – an increase of ten percentage points since last year's survey and 33 percentage points since 1988. Correspondingly, the proportion who say they cannot run their cars on unleaded petrol, but would if they were able to, has declined from 53% to 43%. However, there continues to be a body of drivers who are not keen on unleaded petrol with 7% saying they can use it but choose not to and another 5% who cannot and would not if they could.

Use of Unleaded Petrol

- Q Can your car run on unleaded petrol or not?
Q Do you usually buy unleaded petrol, or not?
Q If you could run on unleaded petrol would you buy it or not?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

CAR PURCHASE

New Versus Second Hand

Just under half the drivers interviewed (45%) had bought a car either new (28% of purchases) or second hand (72%) within the last two years. This was virtually the same proportion as in last year's survey.

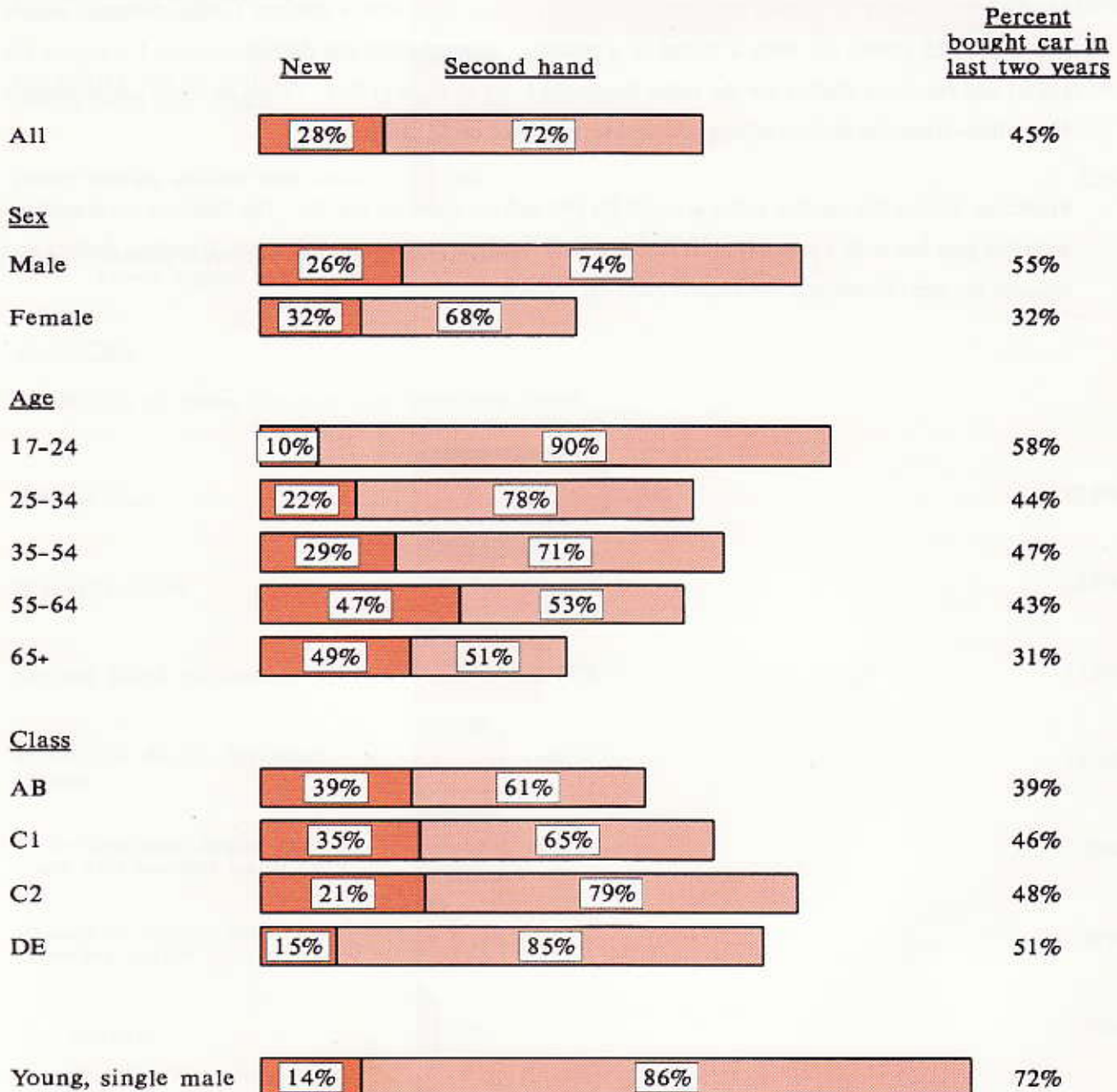
Some groups are far more likely to have purchased a new car than others, particularly men (55%), 17-24 year olds (58%), young, single males (72%) and those in the upper managerial and professional classes (ABs, 74%).

Of those who purchase, the propensity to purchase a new car increases, as you would expect, with age - 10% of 17-24 year olds rising to 48% of those aged 65+ - and social class - 15% of DEs rising to 39% of ABs.

Although women are only two thirds as likely as men to have bought a car in the last two years, they are more likely to have bought a new car (32% compared with 26%).

Car Purchase

Q Have you personally been responsible for buying a car either new or second hand within the last two years?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

SOURCE OF PURCHASE

Four out of five new car purchasers (83%) bought from a franchise dealer selling only their make of car rather than a franchise dealer for more than one make (14%).

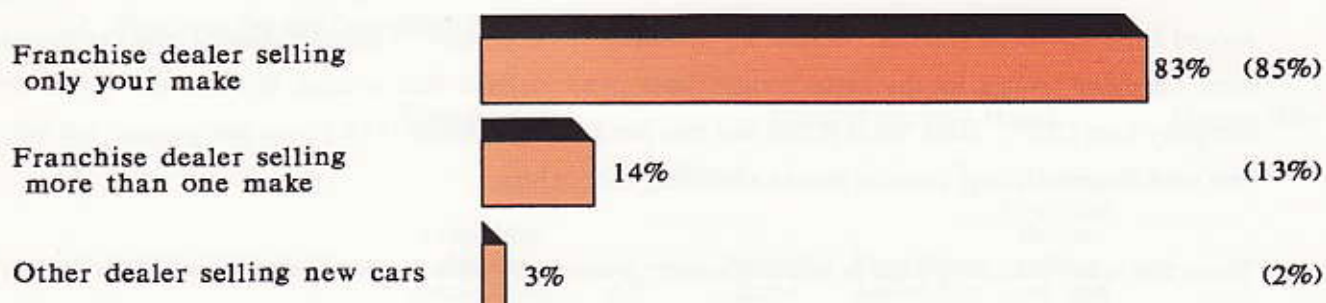
More than a quarter of second hand purchases are private deals with a stranger (28%), although one in five purchases (19%) are from a friend or a relative. Second hand car dealers account for one in six (18%) and franchise dealers for the make bought, for one in eight (13%). About as many are accounted for by non-franchise dealers selling new and second hand cars (13%).

Franchise dealers for another make account for 6% and car auctions for 3%. The findings are consistent with last year but with a possible shift in the second hand car market away from the franchise dealers and towards the non-franchised and second hand car dealers.

Source of Purchase

New cars

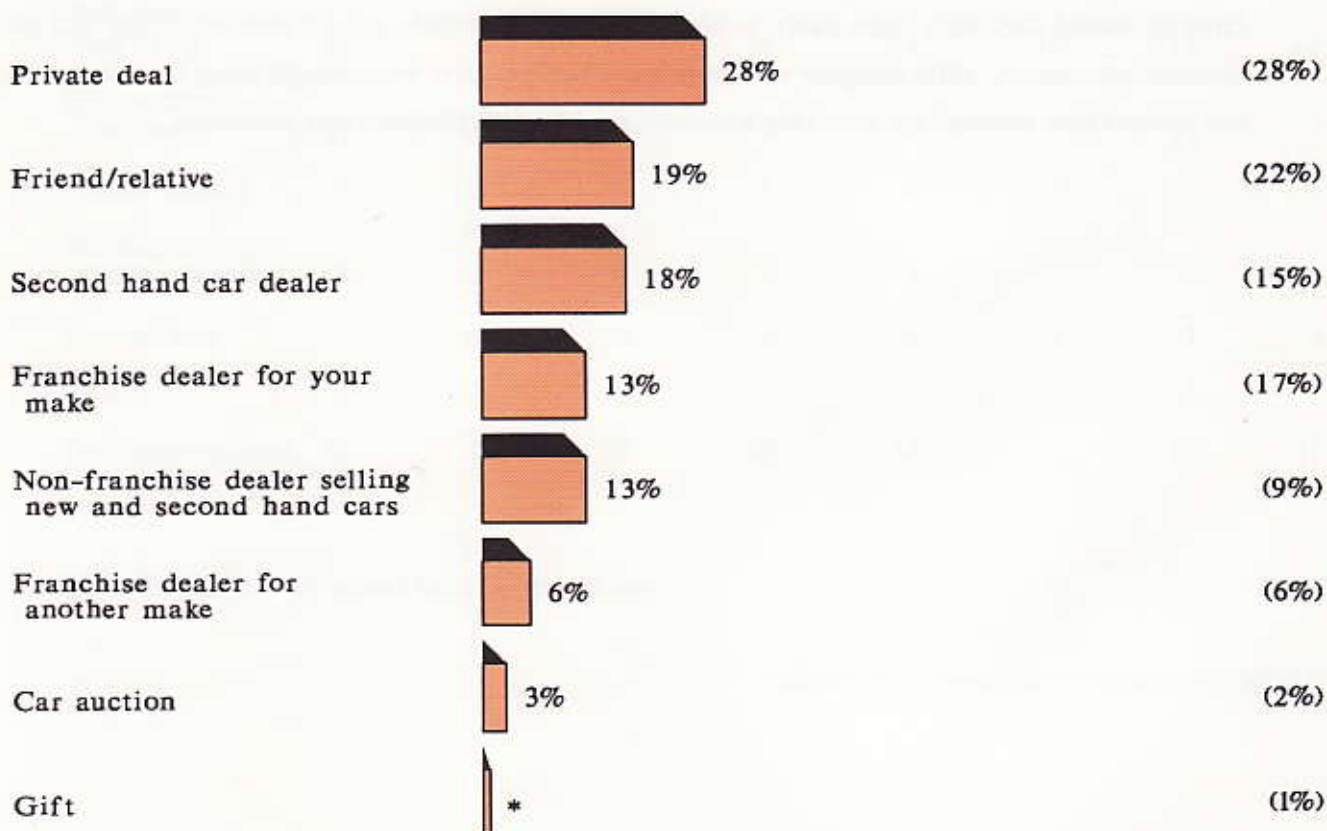
Q Which of these did you buy your car from? (1989)



Base: Bought new car in last 2 years (189)
Don't knows excluded

Used Cars

Q Which of these did you buy your car from?



Base: Bought second hand car in last 2 years (494)

Source: Lex Report on Motoring 1991/MORI

SOURCE OF FINANCE

Around half of those who had bought a car in the last two years and were willing/able to disclose the source of their finance, had paid in cash (44%). If anything this was slightly less true of those buying second hand cars from franchise dealers for the make of car bought. They, and indeed new car buyers from franchise dealers for the make bought, were more inclined than average to have used a finance company loan (20%). Bank loans (12%) and hire purchase agreements (11%) were less popular and very few used finance leasing, contract hire or a building society loan.

Those few who opted for a bank or building society loan rather than a finance company loan did so largely because of the better rates (51%) although a few gave other reasons such as trusting the bank/building society more (14%) or finding it easier or more straight forward (12%). Nearly nine out of ten of those who arranged outside financing other than through a bank or building society loan, did so through the dealer where they bought the car. The handful who did not were often attracted by better interest rates elsewhere.

Privately owned cars were more likely to have been bought by cash, private company loans, and hire purchase agreements, while company cars were more likely to have been bought using finance lending, and contract hire, although the latter only accounted for 4% of the company cars purchased.

Source of Finance

Q How was the car (you drive most frequently) bought?

	Bought new			Bought Second Hand			Ownership	
	All (440) %	Franchise dealer specialising in your make (157) %	All second hand (244) %	Second hand car dealer (88) %	Franchise dealer for your make (66) %	Non- franchise dealer selling new and second hand (62) %	Private (382) %	Company (56) %
Base:								
Cash	44	47	46	47	39	53	45	39
Finance company loan/(and cash)	15	20	11	9	20	6	16	13
Bank loan/ (and cash)	12	8	15	18	14	10	11	13
Hire purchase/ (and cash)	11	15	7	9	8	5	11	7
Finance leasing	3	5	1	1	0	2	2	9
Building society loan (and cash)	1	2	1	1	2	2	2	0
Contract hire	1	2	0	0	0	0	1	4
Other	3	3	2	2	5	2	2	5
Don't know/refused	10	4	15	13	14	21	10	11

Base: Bought new or second hand car from dealer

Source: Lex Report on Motoring 1991/MORI

CONSIDERATIONS IN DECIDING ON SOURCE OF PURCHASE

Asked to select the two or three considerations, from a list of fourteen, which they considered most important in deciding on the place to purchase their car, 'good reputation' (32%) and 'availability of the desired make' (31%) lead the way. Slightly less important were an outlet selling the 'preferred make of car' (27%) with a 'willingness to accept a trade-in' (23%) and to 'negotiate the price' (22%) just behind.

Among those buying new cars, dealers' reputation and a dealer which sold the preferred make were of paramount importance (37%), followed by a willingness to negotiate on price (28%).

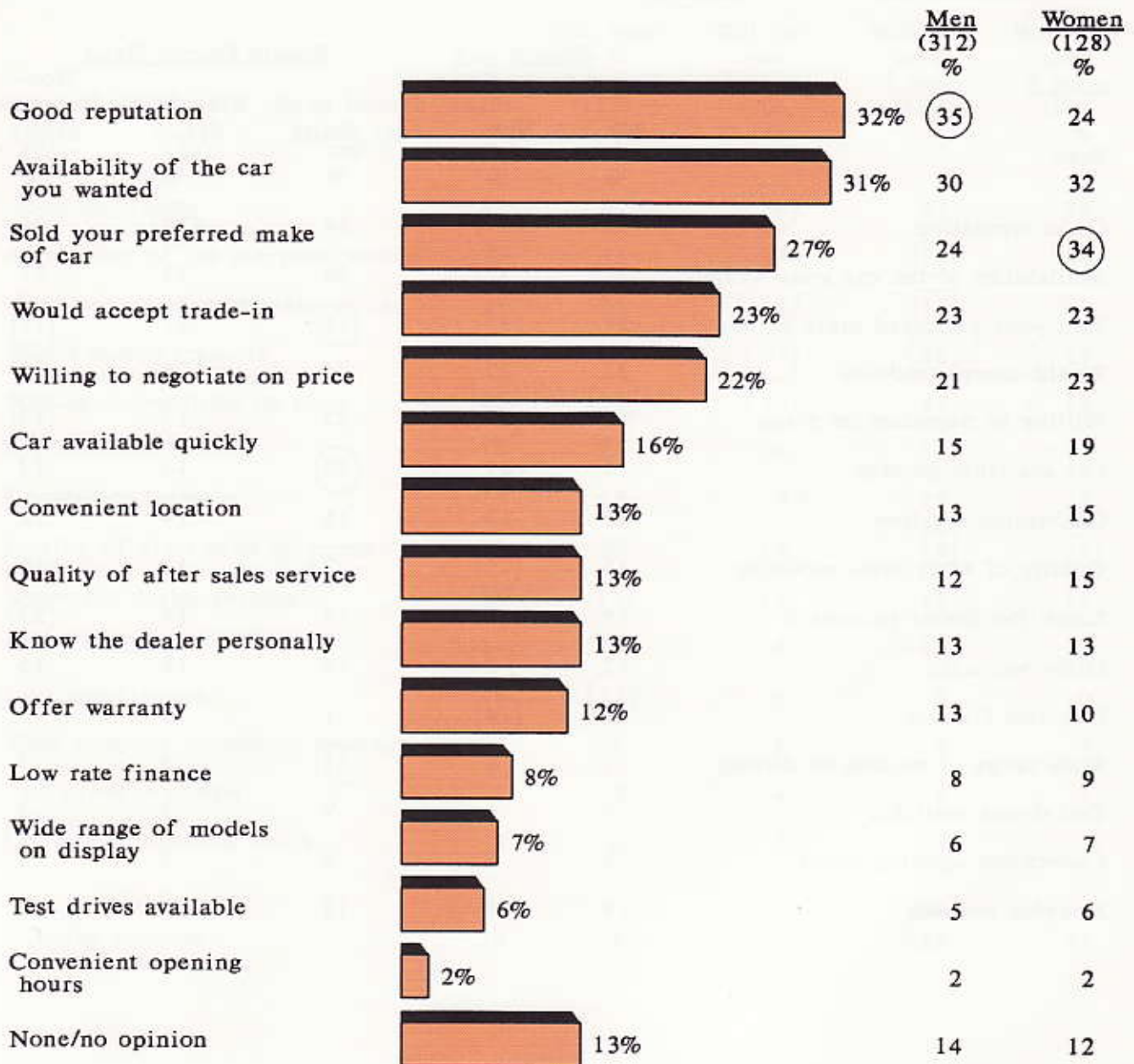
Dealers' reputation was also the main consideration among those buying second hand from a franchise dealer. Those who also bought their car from a franchise dealer were particularly likely to value personally knowing the dealer concerned (23% compared with an average 13%).

Relative to second hand car buyers, those who bought their car new valued the reputation of the dealer, willingness to negotiate on price and the quality of after sales servicing. Among those intending to keep their new car for more than three years, selling the preferred make of car was the overriding selling point (44%). Those buying second hand who intended to keep their car no more than three years valued a trade-in as much as any other factor but were relatively unconcerned about the make of car sold.

In the table overleaf, those findings which indicate that a particular sub-group are markedly more likely to select a particular contribution than other groups have been circled, while those findings which indicate a particularly low propensity to pick each item have been boxed.

Considerations in Deciding on Source of Purchase

Q Which two or three items on this list were most important for you in deciding the place you would buy the car from?



Base: Bought new/second hand car
from dealer in last 2 years (440)

Source: Lex Report on Motoring 1991/MORI

Considerations in Deciding on Source of Purchase - By Source

	<u>Bought new</u>		<u>Bought Second Hand</u>		
	<u>All</u> (440) %	<u>New</u> (196) %	<u>Second hand</u> <u>car dealer</u> (88) %	<u>Franchise</u> <u>dealer</u> (66) %	<u>Non-</u> <u>franchise</u> <u>dealer</u> (62) %
Base:					
Good reputation	32	(37)	24	(35)	26
Availability of the car your wanted	31	31	28	33	27
Sold your preferred make of car	27	(37)	16	27	18
Would accept trade-in	23	22	25	24	15
Willing to negotiate on price	22	(28)	22	17	13
Car available quickly	16	17	(20)	14	13
Convenient location	13	13	16	14	11
Quality of after sales servicing	13	(19)	7	11	10
Know the dealer personally	13	10	13	14	(23)
Offer warranty	12	8	16	18	15
Low rate finance	8	(14)	1	3	5
Wide range of models on display	7	6	(11)	5	3
Test drives available	6	6	9	3	5
Convenient opening hours	2	1	3	3	2
None/no opinion	13	6	18	17	22

Base: All bought new/second hand from
dealer/garage (440)

Source: Lex Report on Motoring 1991/MORI

Considerations in Deciding on Source of Purchase - By Type of Buyer

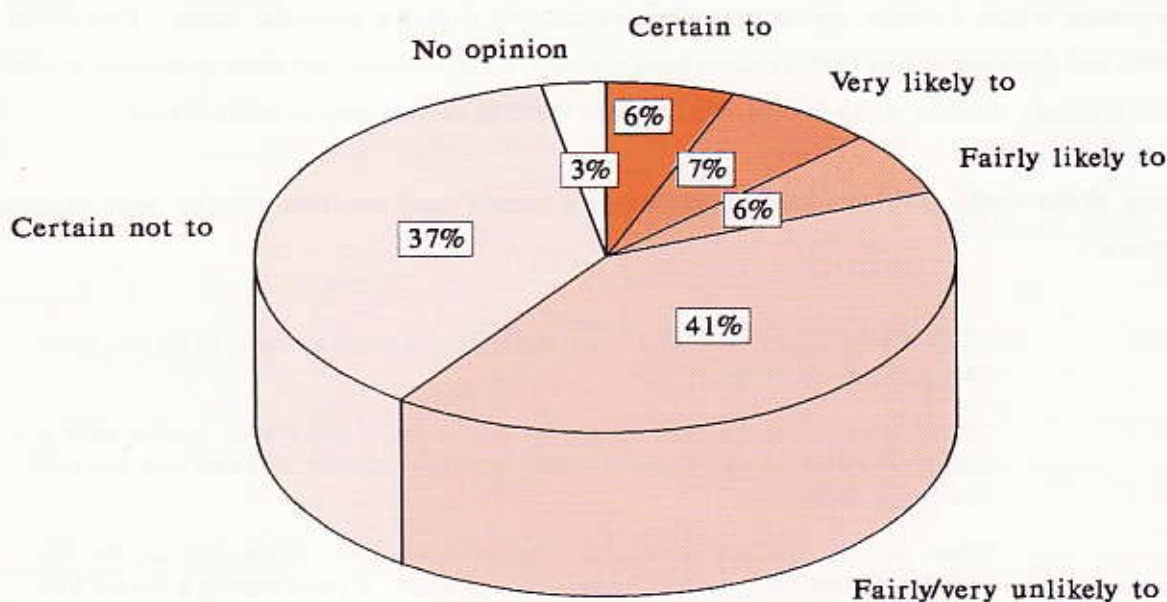
Base:	<u>All</u> (440) %	<u>Bought new</u>		<u>Bought second hand</u>	
		Will own up to <u>3 years</u> (117) %	Will own over <u>3 years</u> (70) %	Will own up to <u>3 years</u> (130) %	Will own over <u>3 years</u> (90) %
Good reputation	32	35	36	27	28
Availability of the car your wanted	31	32	33	28	34
Sold your preferred make of car	27	34	44	17	20
Would except trade-in	23	19	27	28	19
Willing to negotiate on price	22	29	30	17	12
Car available quickly	16	21	16	12	18
Convenient location	13	15	9	15	11
Quality of after sales servicing	13	20	19	8	6
Know the dealer personally	13	7	11	16	13
Offer warranty	12	9	6	15	19
Low rate finance	8	17	9	5	0
Wide range of models on display	7	6	6	8	7
Test drives available	6	5	4	8	2
Convenient opening hours	2	0	3	3	2
None/no opinion	13	5	4	19	23

Base: All bought new/second hand from
dealer/garage (440)

Source: Lex Report on Motoring 1991/MORI

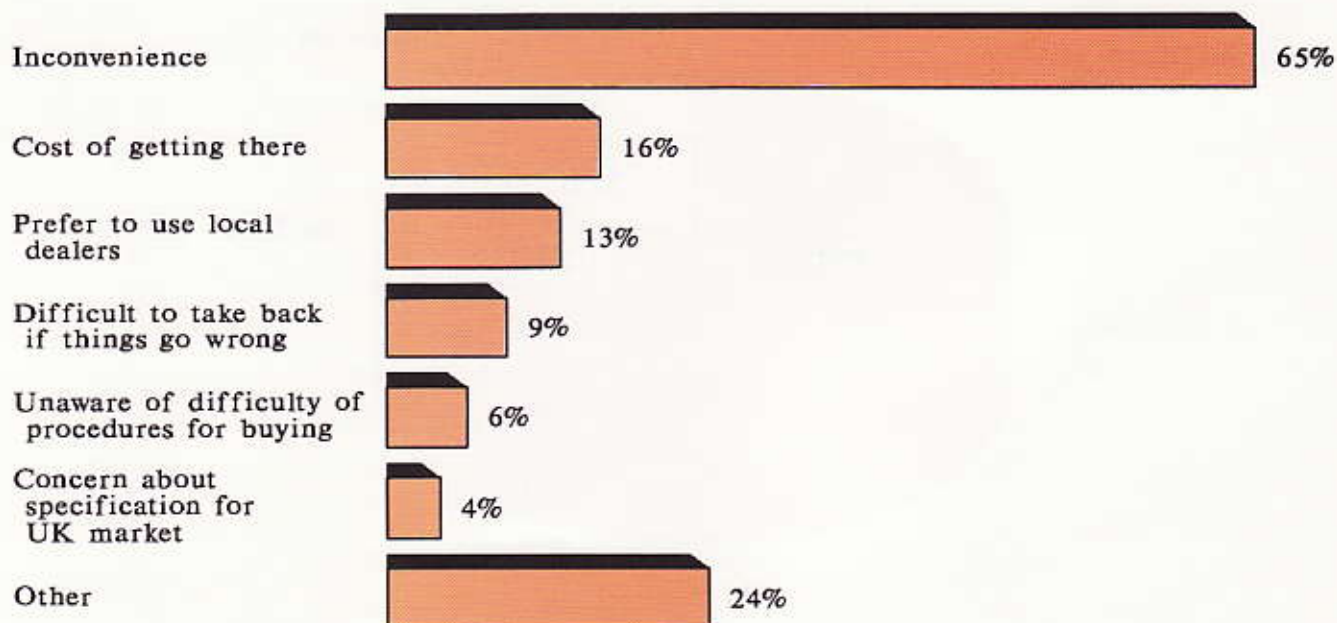
Buying Discount in Europe

Q If you knew you could have bought the same car for a 10% lower cost in France or Belgium, but you would have to go and collect it yourself, how likely would you have been to do so?



Base: Bought new car in last 2 years (196)

Q Why would you have been unlikely to do so?



Base: Unlikely to have bought (152)

Source: Lex Report on Motoring 1991/MORI

MONEY BACK GUARANTEE/CAR EXCHANGE

Money back guarantees and exchanges of equivalent value if the second hand car buyer is not happy with a purchase within a month, appear to be strong incentives to pick a particular dealer. Two out of three (66%) and three out of five (59%) second hand car buyers, respectively, say these guarantees would make them seriously consider using dealers offering these services in preference to other dealers.

Some of the concerns drivers have about buying a second hand car from a dealer were expressed as follows:

"That it is sound mechanically – you don't want something that will let you down when you get out of the garage"

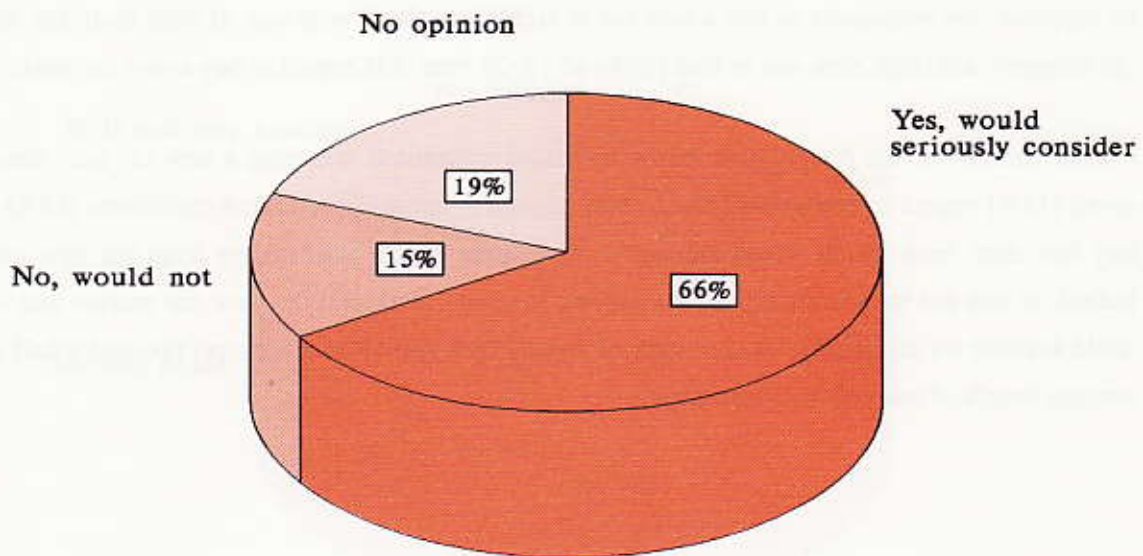
"It concerns me that I may be getting just a lot of sales chat, rather than a genuine bargain. I also doubt that their promises of after sales service etc, will be as good as they say"

"That the car you are getting is what you pay for. Especially as the big franchises dump their cars on second hand dealers. If I was buying a Ford I'd go to a Ford dealer for it"

"The reliability of the car concerns me. You're never sure of who's driven it before or how careful they've been with it"

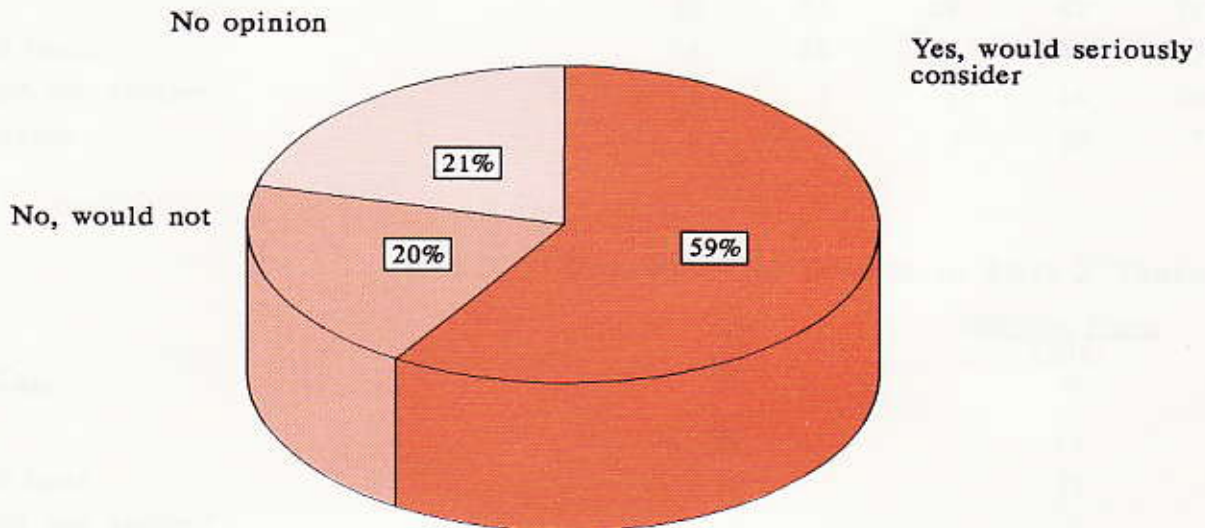
Money Back Guarantee

- Q If a car dealer or garage offered a money back guarantee if you were not happy within one month of purchase of a second hand car, would you seriously consider using that dealer instead of another, or not?



Car Exchange

- Q If a car dealer or garage offered to exchange your car for another of equivalent value if you were not satisfied within one month of purchase, would you seriously consider using that dealer in preference to another, or not?



Base: Bought second hand car from a garage/dealer (244)

Source: Lex Report on Motoring 1991/MORI

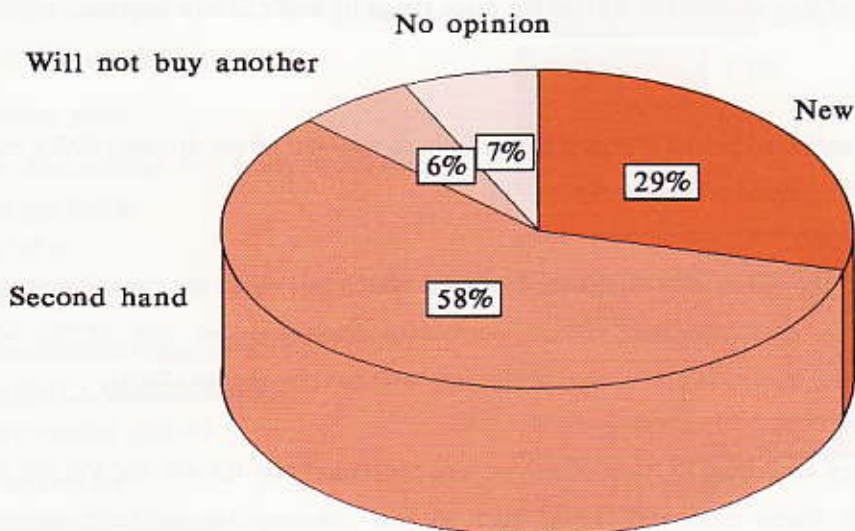
NEXT CAR PURCHASE

Three out of ten drivers (29%) expect the next car they buy to be a new one, while exactly twice that number (58%) expect it to be a second hand car. The rest either do not expect to buy another car - particularly those aged 65+ (29% compared with 6% overall) or, as yet, have no opinion (7%). As might be expected, the propensity to buy a new car is highly correlated with age, at least up to the 55-64 year old category, although even one in four (26%) of 17-24 year olds expect to buy a new car next.

Current drivers of cars bought new are by no means committed to buying a new car next time. One in seven (15%) expect to buy second hand, although one in seven second hand car drivers (14%) expect to buy new next time which would amount to more than double the leakage from the new car drivers. Indeed, if this net transference from the second hand car market to the new car market was realised it could account for an increase in new sales of around 20% spread over the next two and a half years (the average length of ownership of new cars).

Next Car Purchase

Q Do you think the next car you buy will be new or second hand?



Next Car:	17-24 %	25-34 %	35-54 %	55-64 %	65+ %
New	26	23	29	42	31
Second hand	66	69	63	34	33
Will not buy another	2	1	1	14	29
No opinion	6	7	7	10	7

Previous Car Bought in Last 2 Years

Next Car:	New (196) %	Second Hand (508) %
New	71	14
Second hand	15	77
Will not buy another	4	4
No opinion	10	5

Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

CAR BUYING CONSIDERATIONS

Drivers were presented with a list of twenty-three considerations they might take into account when making their choice of car and were asked to select the five or six they considered most important.

Cost and price considerations head the list of priorities with low petrol consumption/economical being selected by three out of five drivers (60%) and the price range by half (53%). Reliability (52%) was also strongly favoured.

The ability to run on unleaded petrol is now a key criteria to four out of ten drivers (39%), much more so than the inclusion of a catalytic converter (12%).

Comfort (28% headed the list of characteristics favoured which related to the car although performance characteristics such as easy handling (27%), performance/speed/engine size (27%) were equally important. A known and trusted manufacturer is also important to one in four (26%).

But considerations vary according to types of driver, and particularly by the sex and the age of the driver. Women, for example, stress economic factors such as fuel consumption and price range as well as reliability rather more than their male counterparts, while men are markedly more interested in running on lead free petrol and having good after sales service/warranty.

Young single males are less concerned with fuel consumption and unleaded petrol and more concerned with performance/speed/engine size (53%) and markedly more concerned with comfort (43%) and styling (38%) than other drivers.

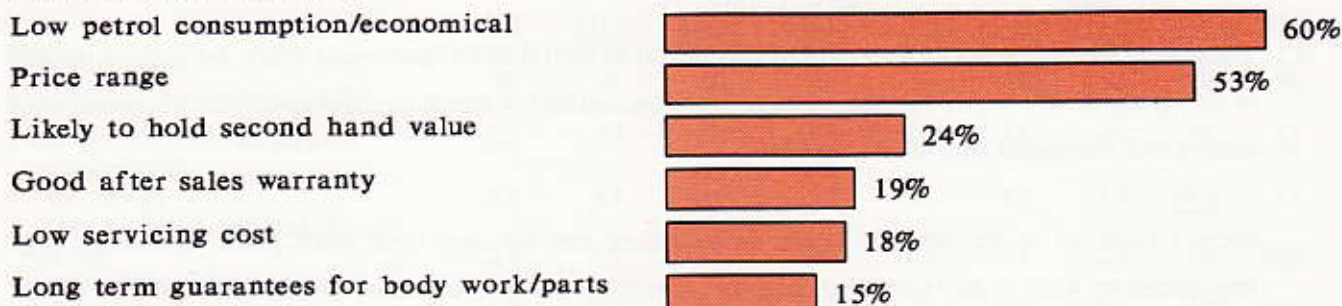
Those buying a new car are more likely than average to require their car to run on unleaded petrol (47%) and to come with good after sales service/warranty (26%). Second hand car buyers were more likely to value low petrol consumption (63%) being in the right price range (58%), reliability (54% - perhaps taken more for granted by new car buyers), passenger space (27%) and holding its second hand value (26%) as important criteria.

Buying considerations also vary according to type of buyer. Whether they bought their previous car new or second hand and intend to own it for up to three years or longer has an important bearing on the factors considered important. Those who bought new but do not intend to keep their car longer than three years, for example, expressed particularly strong preferences for a make or a manufacturer they know and trust (33% compared with an average 26%), but are less concerned about the price range (47% compared with 53%).

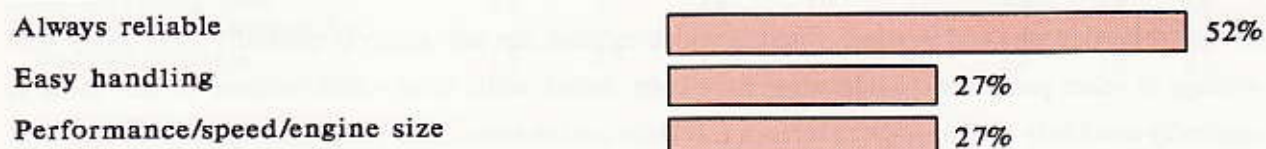
Car Buying Considerations

Q When you come to buy your next car, which five or six of the considerations on this list do you think would be most important in your choice of car?

Price/cost considerations



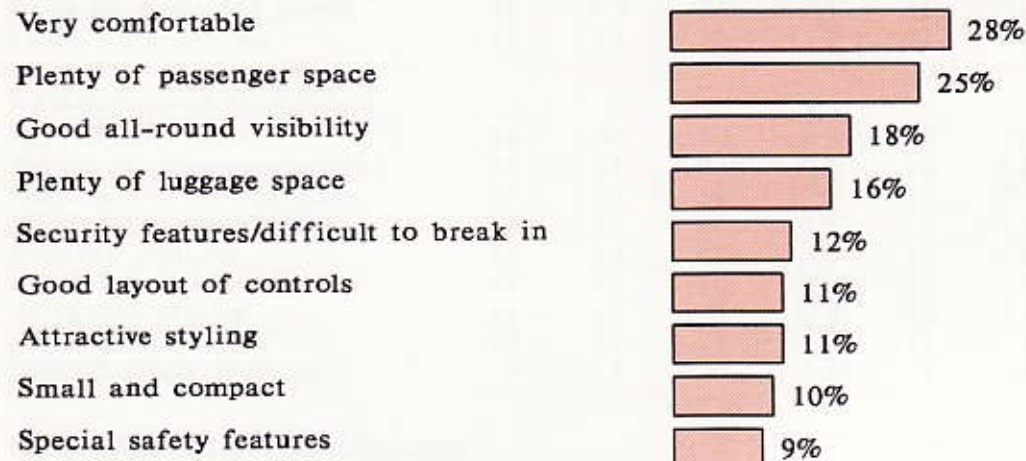
Driving Experience



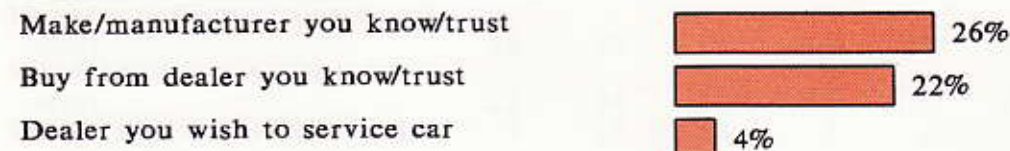
Environmental Considerations



Characteristics of the car



Characteristics of manufacturer/dealer



Base: All likely to buy another car in future

Source: Lex Report on Motoring 1991/MORI

New car buyers intending to own their cars over three years are particularly likely to look for a car which runs on unleaded petrol (52% compared with an average 39%) and which comes with a long-term guarantee (22% compared with 15% on average). They are less likely to value comfort or the car's ability to hold its second hand value.

Those who bought their car second hand and intend to hold it up to three years place the highest priority of any group on low petrol consumption, and, understandably, a strong preference to hold its second hand value (30% compared with an average 24%).

Second hand car buyers who do expect to own their cars for over three years place particularly high importance on a car in the right price range but give relatively little credence to after sales service (15%).

In the tables opposite and overleaf, findings which indicate the sub-group is markedly more likely than average to select particular considerations have been circled, while those which indicate the sub-group is markedly less likely than average to select a particular consideration have been boxed.

Buying Considerations by Type of Buyer I

	All	Next car	Second	Single,			Age		
Base:	(1361)	New	hand	young	17-24	25-34	35-54	55-64	65+
	%	(449)	(912)	male	(160)	(378)	(533)	(133)	(113)
	%	%	%	%	%	%	%	%	%
<u>Price/cost considerations</u>									
Low petrol consumption/ economical	60	53	63	48	62	58	63	58	55
Price range	53	43	58	52	56	53	55	42	52
Likely to hold second hand value	24	19	26	34	29	24	25	19	17
Good after sales service/ warranty	19	26	16	10	13	19	20	28	16
Low servicing cost	18	16	19	16	11	18	19	17	20
Long term guarantees for bodywork/parts	15	19	13	17	16	12	15	21	19
<u>Driving Experience</u>									
Always reliable	52	46	54	50	52	56	52	50	39
Easy handling	27	28	27	21	29	25	30	22	26
Performance/speed/engine size	27	26	26	53	43	28	23	23	20
<u>Environmental Considerations</u>									
Runs on unleaded petrol	39	47	35	28	32	34	40	49	49
Catalytic converter	12	15	10	10	12	9	11	16	18
<u>Characteristics of the Car</u>									
Very comfortable	28	30	27	43	39	28	25	32	27
Plenty of passenger space	25	21	27	10	16	37	23	14	19
Good all-round visibility	18	17	19	10	14	17	18	17	28
Plenty of luggage space	16	16	16	5	6	19	18	16	12
Security features	12	14	11	14	15	12	11	12	12
Good layout of controls	11	12	10	19	14	9	10	11	15
Attractive styling	11	13	9	38	26	13	7	3	5
Small and compact	10	12	9	3	11	7	10	15	17
Special safety features	9	8	9	2	8	10	9	8	4
<u>Characteristics of Manufacturer/ Dealer</u>									
Make/manufacturer you know/ trust	26	29	25	16	19	24	28	32	30
Buy from dealer you know/ trust	22	24	21	12	14	21	21	29	31
Dealer you wish to service car	4	7	3	2	1	1	4	14	7

Base: All likely to buy car in future

Source: Lex Report on Motoring 1991/MORI

Buying Considerations by Type of Buyer II

		<u>Bought new</u>		<u>Bought second hand</u>	
		Will own up to <u>3 years</u> (236) %	Will own over <u>3 years</u> (178) %	Will own up to <u>3 years</u> (438) %	Will own over <u>3 years</u> (377) %
Base:	<u>All</u> (1361) %				
<u>Price/cost considerations</u>					
Low petrol consumption/economical	60	52	54	64	61
Price range	53	47	53	52	58
Likely to hold its second hand value	24	23	16	30	24
Good after sales service/warranty	19	24	26	18	15
Low cost of servicing	18	17	16	16	20
Long term guarantees for body work/mechanical parts	15	13	22	13	16
<u>Driving Experience</u>					
Always reliable	52	48	52	52	53
Easy handling/easy to drive	27	24	28	27	27
Performance/speed/engine size	27	29	25	31	23
<u>Environmental Considerations</u>					
Runs on unleaded petrol	39	42	52	34	37
Catalytic converter	12	16	17	7	11
<u>Characteristics of the Car</u>					
Very comfortable	28	30	19	30	29
Plenty of passenger space	25	21	20	28	29
Good all round visibility	18	18	15	17	20
Plenty of luggage space	16	19	15	14	17
Security features	12	14	12	12	11
Good layout of controls	11	13	7	11	10
Attractive styling	11	15	5	13	8
Small and compact	10	11	19	5	11
Special safety features	9	6	13	7	11
<u>Characteristics of Manufacturer/ Dealer</u>					
Make/manufacturers you know/trust	26	33	25	25	26
Buy from dealer you know/trust	22	21	25	24	20
Buy from dealer wish to service car	4	8	6	3	1

Base: All likely to buy car in future (1,361)

Source: Lex Report on Motoring 1991/MORI

SERVICING THE CAR

SERVICING THE CAR

Servicing the Car

Three quarters (73%) of those surveyed had primary responsibility for getting their car serviced – nine in ten (90%) men and one half (48%) of women.

A third (32%) have their car serviced by a main dealer for their make of car, while 26% go to a garage or workshop not selling new cars. New car drivers are most likely to go to a main dealer (62% compared with 15% for used car drivers). Women are more likely to use a garage or workshop (34%) than men (24%). Men, however, are much more likely to do their own servicing (29% against 10% of women, although this figure includes the car being serviced by someone else in the household). A third (32%) of second hand drivers do their own servicing.

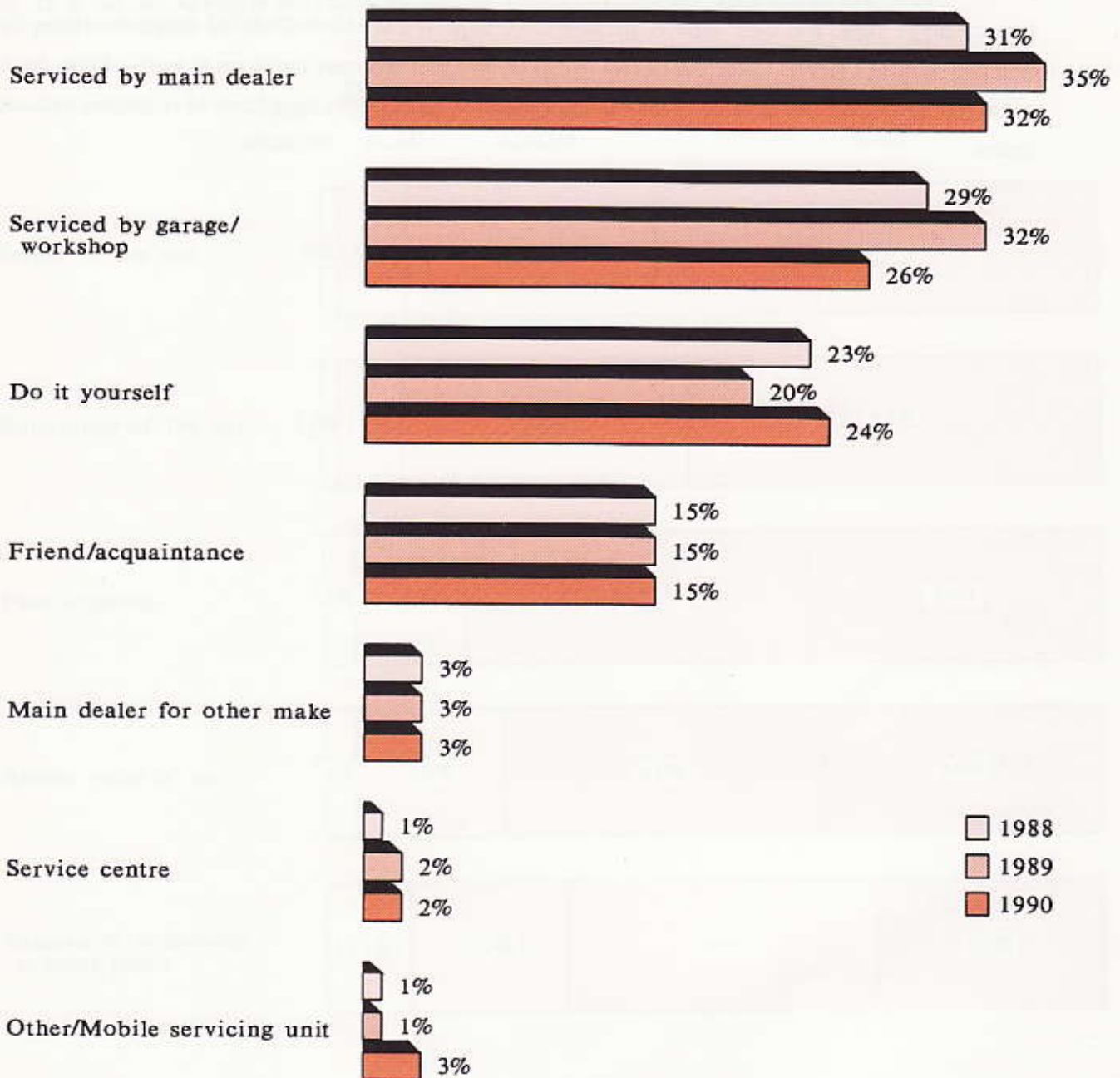
Choice of Servicing Location

	All %	Men %	Women %	Bought new %	Bought second hand %
Main dealer for make of car	32	31	35	62	15
Garage/workshop	26	24	34	18	31
Do-it-yourself	24	29	10	10	32
Friend/acquaintance	15	13	18	8	19
Main dealer for other make	3	2	4	3	2
Service centre	2	2	2	2	3
Mobile service unit	3	3	5	2	4

Compared with last year, there appears to have been a shift towards do-it-yourself servicing and away from franchise dealers and non-franchise workshops.

Who Does the Servicing?

Q Which of these do you do?



Base: All with responsibility for servicing

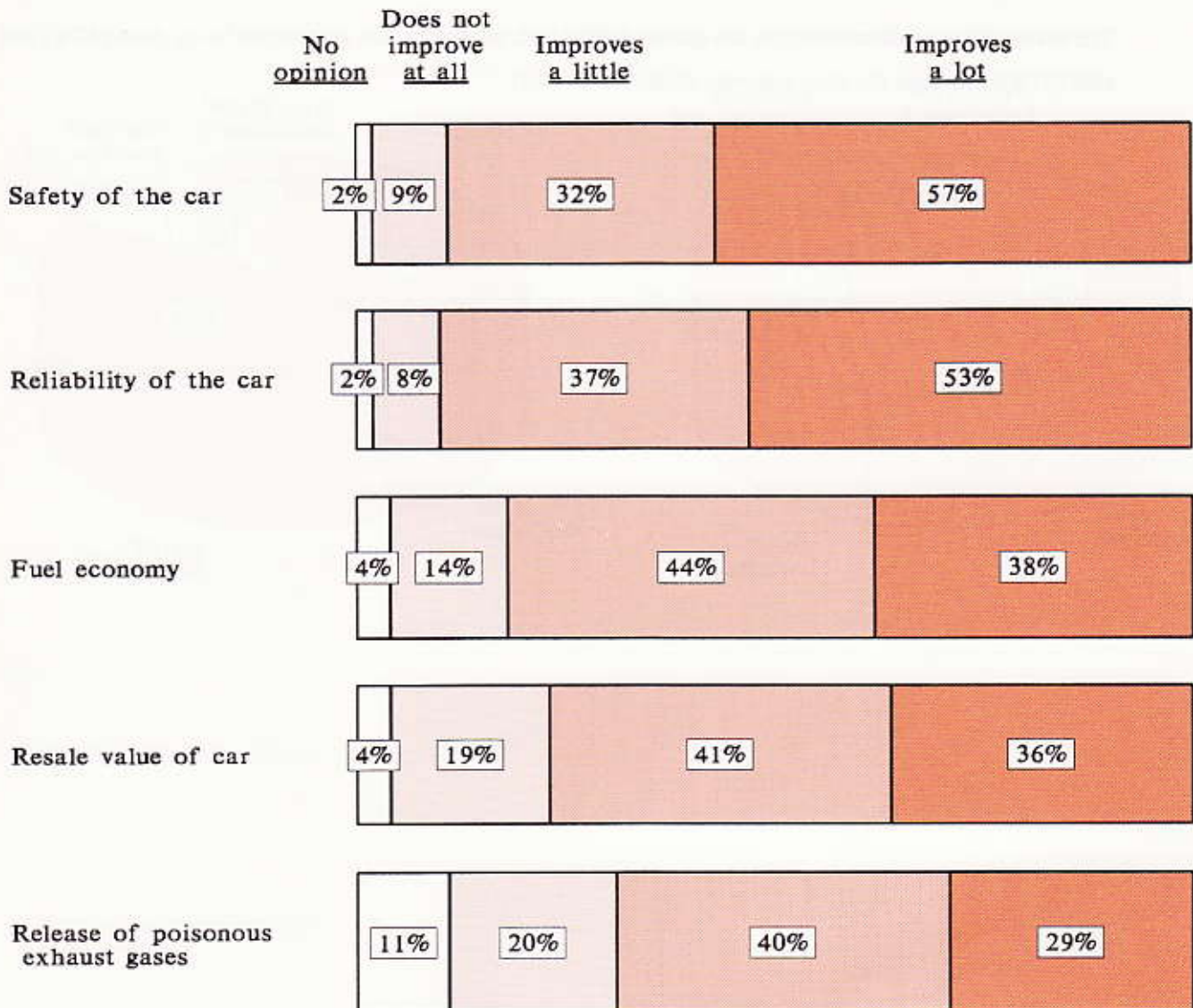
Source: Lex Report on Motoring 1991/MORI

EFFECTS OF REGULAR SERVICING

Drivers generally understand the benefits of regular servicing according to manufacturers' specifications. Over half believe it 'improves the safety of the car' and 'the reliability of the car' a lot (57% and 53% respectively). These and other aspects are seen to be improved at least 'a little' by regular servicing by over two-thirds of drivers. Four out of five (82%) believe fuel economy improves at least 'a little', three out of four (77%) the resale value of the car and two out of three (69%) the release of poisonous exhaust fumes.

Effects of Regular Servicing

Q If a car is regularly serviced according to manufacturers' specifications, what effect do you think this has on the following?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

SATISFACTION WITH SERVICING

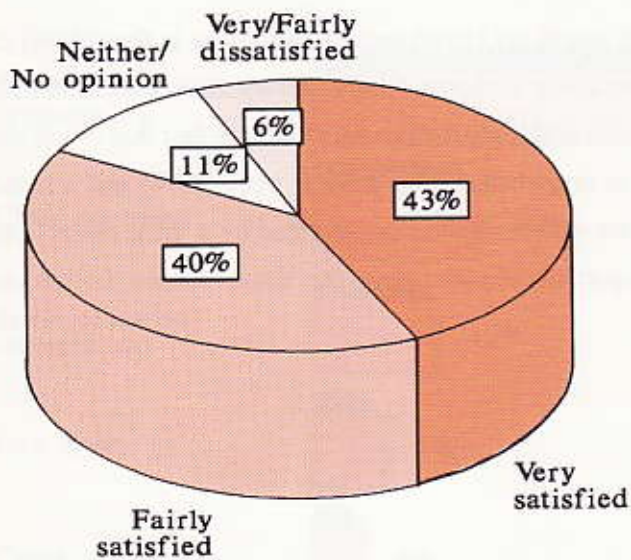
Five out of six drivers who have their car serviced by a main dealer for their make of car express satisfaction with the way it is done (83%), although this is slightly fewer than those who have their car serviced by a garage or workshop (91%).

The main causes of dissatisfaction are quality (49%) and, related to this, repairs not being done (37%) and cost (27%), although the base was very small (41 drivers).

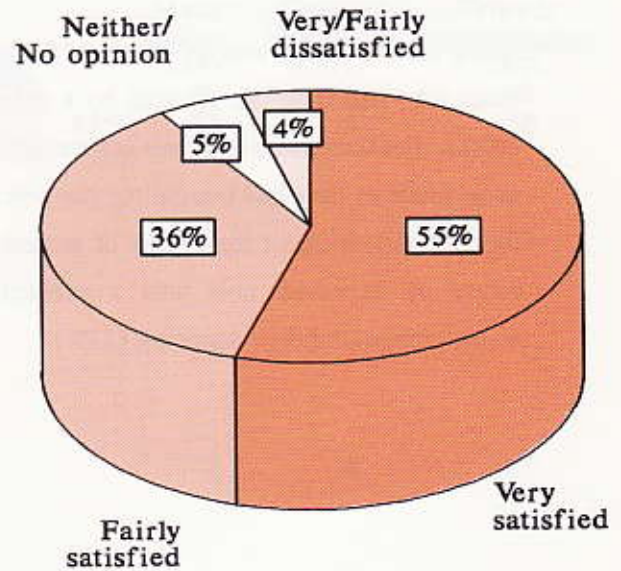
Satisfaction with Servicing

Q How satisfied or dissatisfied are you with the way your car is serviced?

Car serviced by main dealer
for make (368)



Car serviced by garage/
workshop (301)



Base: Have primary responsibility
for getting car serviced

Source: Lex Report on Motoring 1991/MORI

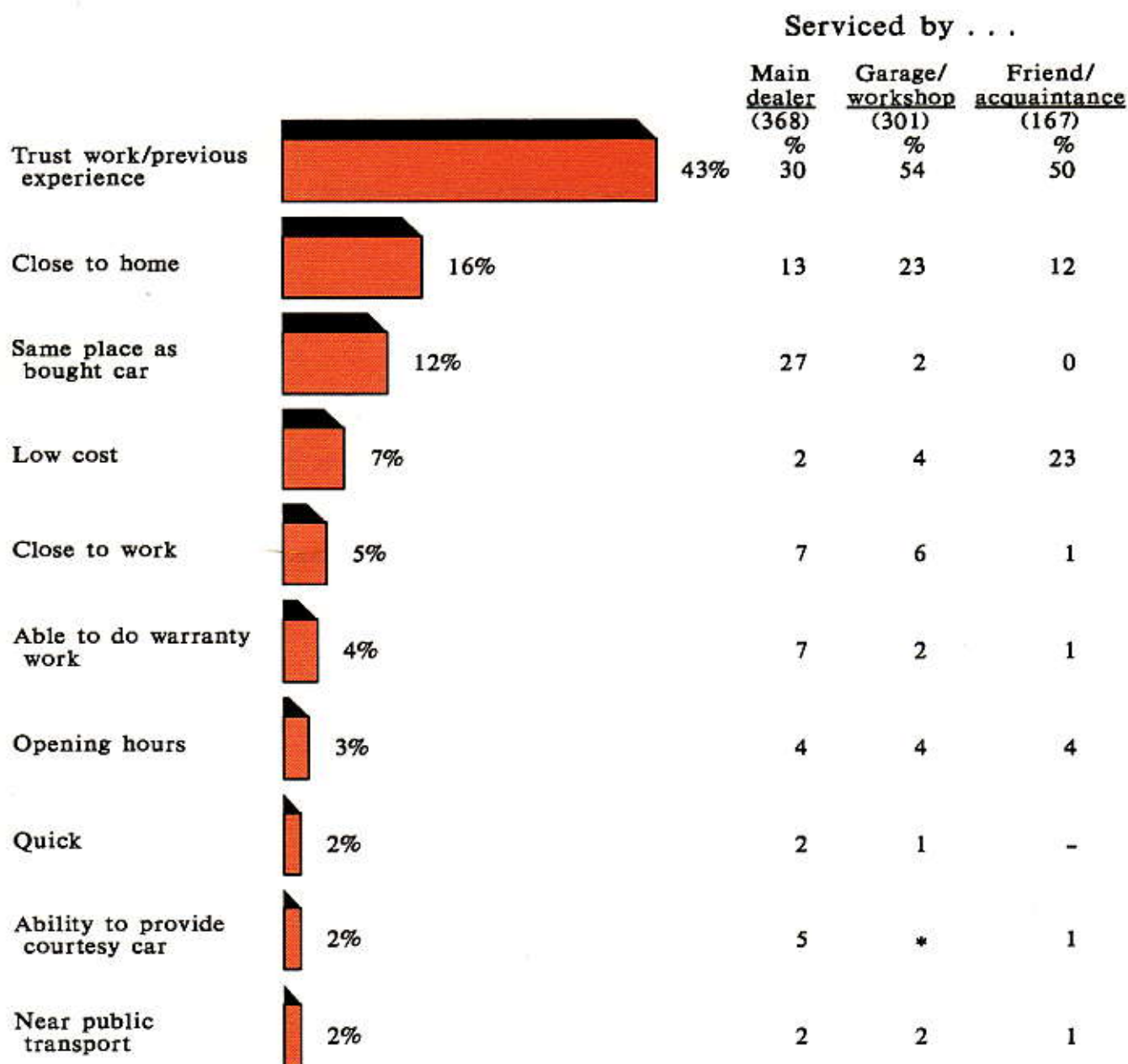
FACTORS IN DECIDING WHERE TO HAVE CAR SERVICED

Trust in the quality of the work, normally based on past experience, is the factor uppermost in more driver's minds than any other when deciding where to get their cars serviced. Four out of ten (43%) chose this factor as the most important out of a list of ten. Among those who had their car serviced at a garage or workshop (54%), and who had friends or acquaintances do their servicing (50%) it was even more important.

Being close to home was an important factor to only one in six (16%) overall, but to one in four (23%) of those who had their car serviced by a garage or workshop and particularly drivers of second hand cars (29%). For those who had their car serviced by a main dealer for their make of car the fact that it was the same place as they had bought the car was almost as important as trust in their work (27%) and was the most important factor for drivers of second hand cars who have their car serviced by a main dealer. As might be expected, cost was a particularly important consideration for those whose friends or acquaintances did their servicing (23%).

Factors in Deciding Where to Have Car Serviced

Q Which of the following is the most important when choosing somewhere to service your car?



Base: Drivers responsible for servicing but not DIY

Source: Lex Report on Motoring 1991/MORI

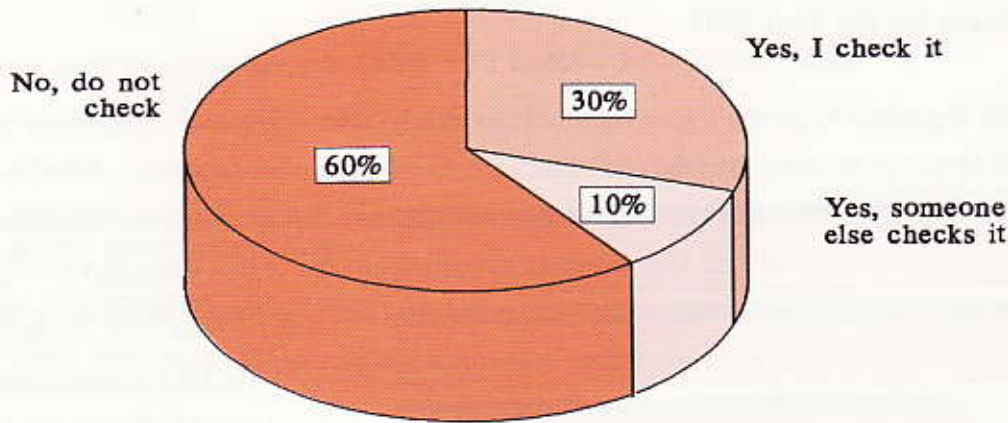
CHECKING SERVICING

Most drivers responsible for servicing do not check the work after it is done. Apparently this is because most of them simply assume it is satisfactory (66%). Others admit they do not know how to check it (23%) and a few just cannot be bothered or do not think about it. However three in ten (30%) do check it themselves and another one in ten (10%) get someone else to check it. Men are far more likely to check it themselves (40%) than women (7%) while women are far more likely to get someone else to check it (23%) compared with 3% of men. Rates of checking are relatively high irrespective of who services the car.

The most likely items to be checked are the oil (56%), the brakes (49%), the general feel of the car by driving it (41%), tyres (32%), plugs (28%), and lights (23%).

Checking Servicing

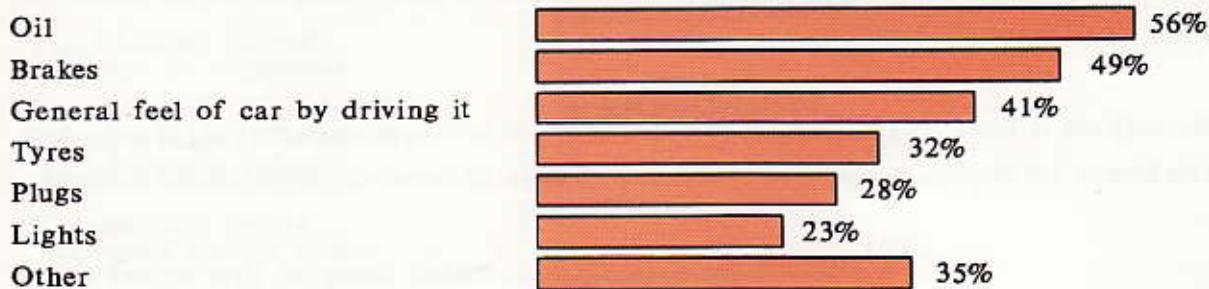
Q Do you or does anyone else (apart from the person who carried out the service) normally check that your car has been properly serviced?



	Men (611) %	Women (281) %
Self	40	7
Someone else	3	23
No	57	70

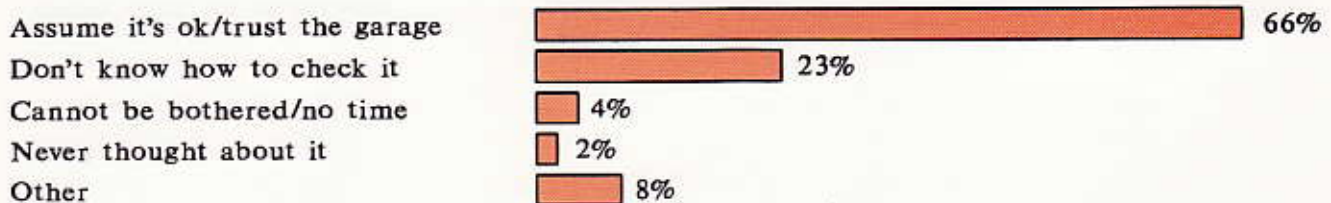
Base: All responsible for servicing but do not do it themselves (892)

Q What do you/they normally check?



Base: All whose servicing is checked (350)

Q Why do you not check that the car has been properly serviced?



Base: All who do not check servicing (529)

Source: Lex Report on Motoring 1991/MORI

THE FUTURE

Expectations for the Year 2001

Despite the opposition to paying higher taxes, drivers clearly have widespread expectations that taxes on petrol will be put up by more than the rate of inflation to discourage consumption. Asked to say from a list of possible eventualities which ones they believe would have happened by the year 2001, nearly half the drivers interviewed (46%) said they expected petrol taxes to rise in this way. In a similar vein, four out of ten (41%) expect the Government to have raised the road fund licence much more than inflation and that there will no longer be tax advantages in having a company car (37%).

Rather fewer expected speed limits on motorways to be raised to 80mph (32%), electric cars commonly used for town driving (28%) and, to reduce pollution, no cars being produced with an engine size over 2000cc (28%).

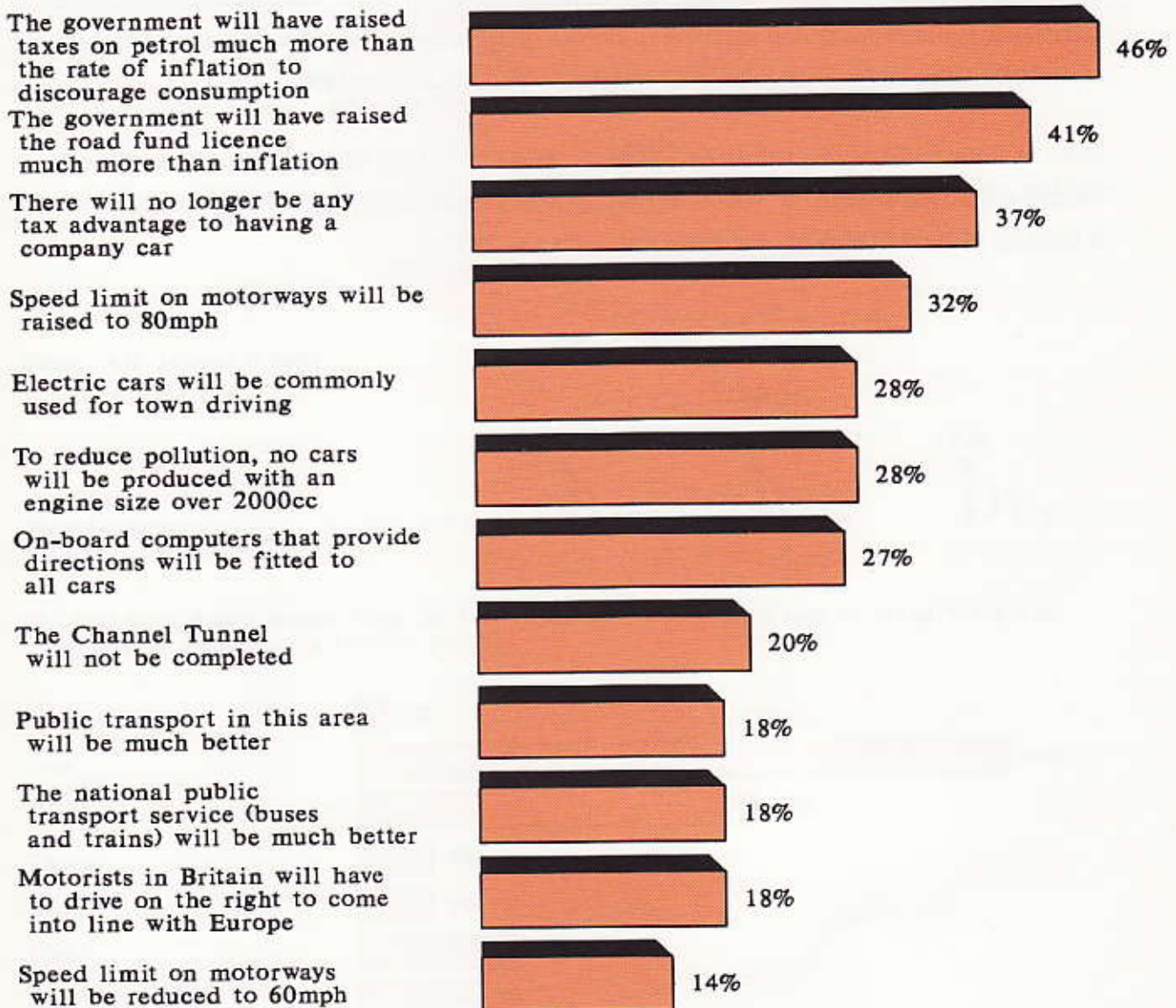
More futuristically, one in four (27%) expect on-board computers that provide directions to be fitted to all cars. Only one in five (20%) are pessimistic enough to expect that the Channel Tunnel will not be completed by 2001. This represented a slight increase from last year's rating (18%).

Expectations about public transport are equally pessimistic. Only one in five (18%) think public transport in areas where they live will be much better, and that the national public transport service (buses and trains) will be much better.

Equally, only one in five (18%) believe motorists in Britain will have to drive on the right to come in to line with Europe and only one in seven (14%) expect speed limits on motorways to be reduced to 60mph.

Expectations for the Year 2001

Q Which, if any, of these do you think will happen by the year 2001?



Base: All drivers (1,564)

Source: Lex Report on Motoring 1991/MORI

THE CHANNEL TUNNEL

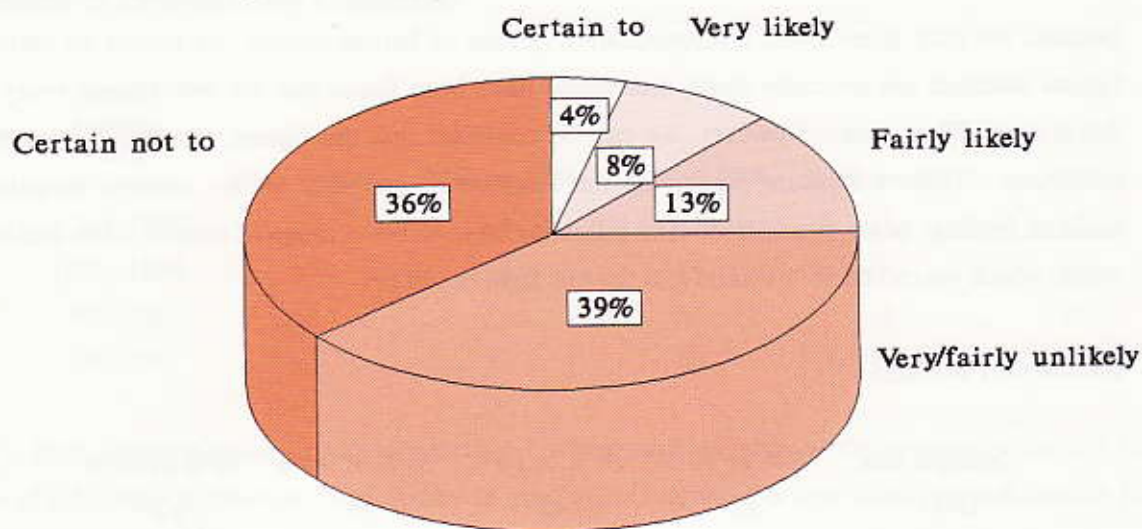
If the Channel Tunnel were to open today only 4% say they would be certain to use it in the next year or so, while a further 21% would be very (8%) or fairly likely (13%) to do so. This represents a decline, albeit slight, for the second successive survey.

Compared with last year those who say they would be 'certain to travel' also indicate a willingness to make fewer journeys in a typical year with an average of 2.2 compared with 2.6. These would gross up to around 2.0 million return journeys per year compared with 2.8 million in 1989.

None of these findings are statistically significant at the 95% level of significance, although they do indicate a worrying trend in line with other findings in this report, suggesting that the economic downturn is affecting motorists' behaviour and intentions across a wide front.

The Channel Tunnel

Q If the Channel Tunnel were to open today, how likely do you think you would be to use it within the next year or so?

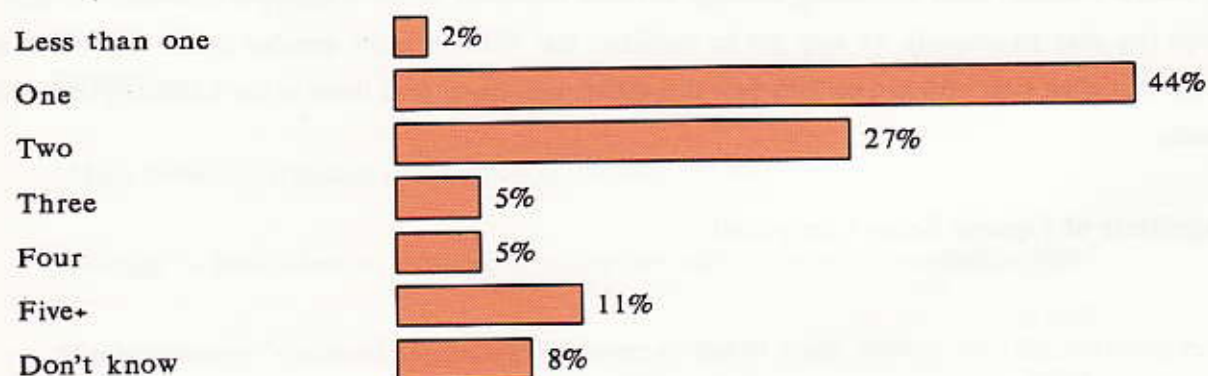


Base: All drivers (1,564)

Trends

	1988	1989	1990
	%	%	%
Certain to	6	5	4
Very likely to	11	8	8
	17%	13%	12%

Q And how many return trips do you think you would be likely to make using the Channel Tunnel in a typical year?



Average number of journeys

2.6

2.2

Total return journeys per year

2.8 million

2.0 million

Base: Certain to travel (66)

Source: Lex Report on Motoring 1991/MORI

APPENDIX

Statistical Reliability

Because we only interviewed a representative sample of British drivers, we cannot be certain that the figures obtained are precisely those that would have been found had we interviewed every individual driver aged 17 or over. However, we can be confident that the figures are correct to within certain tolerances. These tolerances depend on the sample size and also on the order of magnitude of the research findings being considered. The following table shows a range of sample sizes, and the margins within which we can be 95% certain that the true figures will be:

Research Findings

Sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1500	±2	±2	±2	±2	+3
1000	±2	±2	±3	±3	+3
500	±3	±4	±4	±4	+4
200	±4	±6	±6	±7	+7
50	±8	±11	±13	±14	+14

Furthermore, there is a greater likelihood that the true figures are near the centre of these ranges – ie close to the findings from the research.

For similar reasons, when comparing findings between two areas of the country, or between two sub-groups (eg. men vs women), we may not be confident that differences are genuine unless they are of a certain minimum size. We can be 95% sure that differences larger than those in the following table are genuine.

Magnitude of Figures Being Compared

Size of sample being compared	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
500-500	±4	±5	±6	±6	±6
500-250	±5	±6	±7	±7	±8
250-250	±5	±7	±8	±9	±9
250-100	±7	±9	±11	±11	±12
100-100	±8	±11	±13	±14	±14

When comparing this year's findings with last year's findings, the same considerations apply. We can be 85% certain that differences larger than those in the following table are genuine.

Magnitude of Figures being Compared

Size of sample being compared	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1500-1500	±3	±4	±5	±5	±5
1000-1000	±3	±4	±4	±4	±4
500-500	±4	±5	±6	±6	±6
250-250	±5	±7	±8	±9	±9

Strictly, these margins relate to "random samples" where each member of the population has the same chance of selection. In practice, the accuracy of good quota samples has been found to be at least as good as random samples of this size.

Technical Note

Where percentages do not add up to precisely 100%, this could be due to the exclusion of "don't know" responses or the fact that the question allowed for multiple answers. In some cases, it is due to computer rounding of the figures to the nearest whole number.

An asterisk (*) indicates less than one half of one per cent.

Definitions

"Main dealer" - franchise dealers for specific makes of cars

"Garage" - establishments repairing or selling cars without a manufacturer's franchise

"Empty nesters" - married couples aged between 45 and 64 years, without any children living in the household

"Young" - all those aged between 17 and 24 years

"Elderly" - all those aged 65 years and over

"Company cars" - cars either provided by an employer or bought as a business expense.

LEX REPORT ON MOTORING 1989

KEY ISSUES IN 1989 SURVEY

BRITAIN'S DRIVERS

BRITAIN'S CARS

DRIVING BEHAVIOUR

Miles driven per year, use of the car, coping with problems

ATTITUDES TO THE CAR AND DRIVING

Dependence on the car, who make the best drivers, men or women
Garages and the needs of women motorists

STANDARDS AND SAFETY

Driving standards, unsafe driving, additional safety features

THE ENVIRONMENT

Threats to the environment, use of lead free petrol

THEFT OF CARS

TRAFFIC WARDENS AND WHEEL CLAMPING

BRITAIN'S ROAD SYSTEM

COMPANY CAR TAX

THE FUTURE

Multiple car ownership expectations
Expectations for the year 2001, Channel tunnel

BUYING A CAR

New vs second hand, replacement vs additional car
Reasons for buying a car, buying priorities
Choosing a car, who is consulted, who makes the choices
Private vs company cars, the company car – who chooses
Source of purchases, factors in deciding where to buy
attractions of an outlet, personal service
Number of dealers visited, test drives, car purchase finance
Best time to view a car

SERVICING

Importance of servicing, distance prepared to travel
Who services the car, rating of dealer/garage
Specialist fitters vs dealers

LEX REPORT ON MOTORING 1990

KEY ISSUES IN 1990 SURVEY

BRITAIN'S DRIVERS

BRITAIN'S CARS

COMPANY CARS

DRIVERS AND THE ENVIRONMENT

Unleaded petrol, catalytic converters

SAFETY AND THE LAW

Driving misdemeanours
Attitudes towards the MOT test
Features that contribute most to road safety
Attitudes towards law enforcement
Children and seat belts

CONGESTION

The problem
Easing congestion
Use of road traffic reports
Use of motorways
Road signs
Provisions for cyclists and pedestrians

BUYING A CAR

Reasons for changing the car
Place of purchase
Reasons for buying a particular car
Dealers – visits and test drives
Satisfaction with sales experience
Information sources
Influences on choosing the model of car, financing
Treatment of women customers

SERVICING A CAR

Servicing the car
Reasons for choice of location
Satisfaction with servicing
Replacing exhausts and windscreens

THE FUTURE

Expectations for the Year 2001
Use of the Channel tunnel

APPENDIX

Sources and Acknowledgements

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Department of Transport, HMSO, London September 1990

Lex Report on Motoring 1989

Lex Service PLC, London, February 1989

Lex Report on Motoring 1990

Lex Service PLC, London, January 1990

Lex Report on Motoring 1991

LEX SERVICE PLC



Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange. Annual sales approach £2 billion, placing it in the top 100 UK quoted companies, ranked by sales.

Automotive

Lex Service owns Volvo Concessionaires, which has been the sole importer of Volvo cars and car parts into the UK, since 1958. Volvo registered over 66,000 cars in the UK in 1990, giving a market share of 3.3%, the largest market for Volvo cars outside the US. Volvo Concessionaires operates through 280 Volvo dealers throughout the country, which, with the exception of the 10 Lex Volvo dealerships, are all owned and managed independently.

Lex Service is the leading retailer of passenger cars, vans and trucks in the UK, with 70 outlets representing 20 franchises. In addition, Lex has a joint venture car retailing operation in the US.

Lex Retail Group represents the following car lines: Citroën, Ford, Jaguar, Land Rover and Range Rover, Lotus, Nissan, Peugeot Talbot, Rolls-Royce, Rover, Toyota, Vauxhall, Volkswagen Audi and Volvo

Campbell in the US has the Buick, Ford, Lincoln Mercury, Mazda, Nissan, Porsche and Saturn franchises.

The Lex name, which is being applied increasingly to dealerships throughout the group, stands for a level of customer service experience that strives to be not only the best in the motor industry but also matches the developments in retailing in the UK.

Lex Service's commercial vehicle businesses represent Leyland DAF, ERF and Iveco Ford trucks.

Lex Vehicle Leasing provides full service contract hire for passenger cars and light vans. It is the largest specialist contract hire company in the UK with a fleet of over 50,000 vehicles representing most makes of cars and vans. This company is jointly owned by Lex Service and Lombard North Central, the finance subsidiary of National Westminster Bank. Lex and Lombard also jointly own Transfleet and Harvey Plant which provide contract hire of commercial vehicles and fork trucks.

Electronics

Lex Service is also a leading distributor of electronic components and computer products, operating in the US, UK, Germany, France, Taiwan and Japan, representing 80 manufacturers of semiconductors, passive components and computer products. Total sales exceed £500 million a year.

Enquiries: David Leibling, Lex Service PLC, 071 723 1212 January 1991

Considerations in Deciding on Source of Purchase - By Type of Buyer

Base:	<u>All</u> (440) %	<u>Bought new</u>		<u>Bought second hand</u>	
		Will own up to <u>3 years</u> (117) %	Will own over <u>3 years</u> (70) %	Will own up to <u>3 years</u> (130) %	Will own over <u>3 years</u> (90) %
Good reputation	32	(35)	(36)	27	28
Availability of the car your wanted	31	32	33	[28]	34
Sold your preferred make of car	27	34	(44)	[17]	20
Would except trade-in	23	19	(27)	(28)	19
Willing to negotiate on price	22	(29)	(30)	17	12
Car available quickly	16	21	16	12	18
Convenient location	13	15	9	15	11
Quality of after sales servicing	13	20	19	[8]	[6]
Know the dealer personally	13	[7]	11	16	13
Offer warranty	12	9	6	15	19
Low rate finance	8	(17)	9	5	0
Wide range of models on display	7	6	6	8	7
Test drives available	6	5	4	8	2
Convenient opening hours	2	0	3	3	2
None/no opinion	13	5	4	19	23

Base: All bought new/second hand from
dealer/garage (440)

Source: Lex Report on Motoring 1991/MORI

**SURVEY OF BRITAIN'S
CAR DRIVERS**

BUYING DISCOUNT IN EUROPE

If those drivers who bought a new car in the last two years could have bought the same car for 10% less in France or Belgium, 6% believe they would have done so, even if it meant collecting it themselves. A further 13% said they would have been likely to have done so.

The main obstacle for the two in three (65%) who said they would not is the sheer inconvenience of doing so. The cost of getting there (16%), preference for a local dealer (13%) and the difficulty of taking the car back if it proved to be faulty (9%) were far less likely reasons to be mentioned.