

Lex Report on Motoring 1990

The logo for Lex Service is contained within a white rectangular box. It features the word "LEX" in a bold, dark blue, sans-serif font at the top. Below "LEX" are three horizontal orange bars of equal length, stacked vertically. At the bottom of the box, the word "SERVICE" is written in a smaller, dark blue, sans-serif font.

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Lex Report on Motoring 1990

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FOREWORD

Last year's Lex Report on Motoring, based on a survey specially conducted for us by MORI, established a benchmark, measuring motorists' behaviour and 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. In this year's report, we have explored these issues further, measuring the trends in the past twelve months and extending our research into new areas of current interest, based on the many helpful comments which we received last year.

Continued demand for cars

The results of the research are clear - there is an underlying need for individual personal transport, as provided by the passenger car. The research shows that at the end of 1989, there were over 22½ million cars in Britain, almost at the level predicted for 1990 in last year's survey. Despite a less favourable economic environment, Britain's motorists confidently expect to be owning even more cars in two years' time. If their expectations are met, then we will see an extra 1½ million cars on the road by 1991.

More concern for the environment

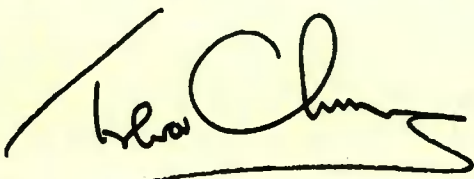
This year's report also reveals two important trends which show how Britain's motorists are becoming more concerned about the environment. Nearly 30% now use unleaded petrol, compared with 5% this time last year, and there is a clear recognition that more needs to be done to reduce congestion - by better use of our roads and traffic management, rather than by restricting the ownership or personal freedom to use cars.

Improved dealer service

Closer to our own industry, the retailing and servicing of cars, we can also see positive signs that the concerted efforts that the car industry has made to raise standards and improve the quality of service which we offer our customers are achieving results. More motorists are using their franchised dealer for servicing and their satisfaction with service is rising.

We recognise that as a customer service industry, we still have a long way to go. Lex Service, as Britain's leading multifranchise car retailer, has used the results of last year's report to extend the range and quality of our services as detailed on page 5. We are again making this year's report widely available to help the entire industry in this common task.

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.



Trevor Chinn, Chairman and Chief Executive, Lex Service PLC

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LEX SERVICE AND THE RETAILING OF CARS IN THE UK

How we use this research in Lex Service

Last year's research (summarised on page 117) provided an enlightening insight into the behaviour and attitudes of Britain's drivers. We learned a great deal about the motivation of our customers before and during the sales process and have a much better understanding of how we can improve our customer service levels.

During the past year, we have concentrated on eight key areas:

- improving facilities for our customers
- extending the range of services we offer
- providing additional guarantees
- training our staff
- measuring and monitoring against specific service standards
- increasing our opening hours
- recruiting graduates
- implementing a "women's task force"

In 1989, Lex Service has spent £20 million on developing facilities in our retail dealerships and relocating to better sites where necessary. We opened brand new facilities for Volvo in Colindale, North London and Jaguar in Chelmsford. We also rebuilt facilities for Toyota and Citroën in Glasgow, Rover in Cardiff and Land Rover in the West Midlands. Major improvement work was carried out in Maidenhead for Land Rover as well as other development in dealerships across the country. We intend to continue investing in improving our facilities in 1990.

Responding to a need to develop a relationship with our customers based on trust, we have introduced packages which to provide reassurance, give used car buyers the most comprehensive protection schemes currently available. Buyers of used cars from Shaw and Kilburn receive protection from "Charter", while the Lex Club provides a range of benefits and services to both new and used car buyers in other parts of the country. Lex Vehicle Leasing, our contract hire company, has introduced Lex Goldshield, which provides a full incident management scheme to company car drivers, to cope with any emergency which could keep the driver off the road.

Lex Service has also concentrated on investing in training. Last year's report showed the importance of the human element in car retailing and we have spent £4 million on training dealer staff in all aspects of customer service and improving the management of their dealerships, providing over 10,000 training days for Lex Service employees and 22,500 days for employees in Volvo dealerships throughout the UK. We have also developed the "Lex Way of Selling" - a professional approach to ensure that the needs of the customer are met in the buying process. Lex recruited over 50 graduates, 15 of whom have now working in dealerships throughout the country. The Graduate Recruitment Scheme works alongside our existing programmes to ensure that we have the top managerial skills required for the future. We also have over 300 Youth Training Scheme employees amongst our 9,300 UK employees and have developed special apprentice schemes with the Manpower Services Commission.

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Within our dealerships, we now offer extended: opening hours to suit customers; courtesy transport while vehicles are being serviced; on-the-spot repairs where possible; menu pricing to remove the "nasty shock" element, and we cater for the needs of our customers by providing comfortable waiting areas with refreshments and telephones available as well as children's play areas.

The Women's Task Force within Lex Retail Group ensures that the needs of both our women customers and our women employees are considered. With demographic changes ahead, it has also provided a useful opportunity for focusing on the issues involved in the employment of women.

We continue to use customer satisfaction initiatives to monitor the success of our dealerships in meeting our customers' needs. The development of a long-term relationship, where the customer returns again and again to our dealerships for the purchasing or servicing a car, is the key indicator of our success.

Lex Service has also encouraged the use of unleaded petrol. Lex Vehicle Leasing has provided conversion facilities free of charge to all its customers. All new Volvo cars imported into the UK can now use unleaded petrol, and virtually all new Volvo cars can be fitted with a catalytic converter at no extra cost.

This year's survey will be used to ensure that we are continuing to meet the needs of our customers and develop new initiatives in customer service.

TEN YEARS OF MOTORING STATISTICS

Car ownership in the UK

**Growth in cars in use
and scrappage in the UK**

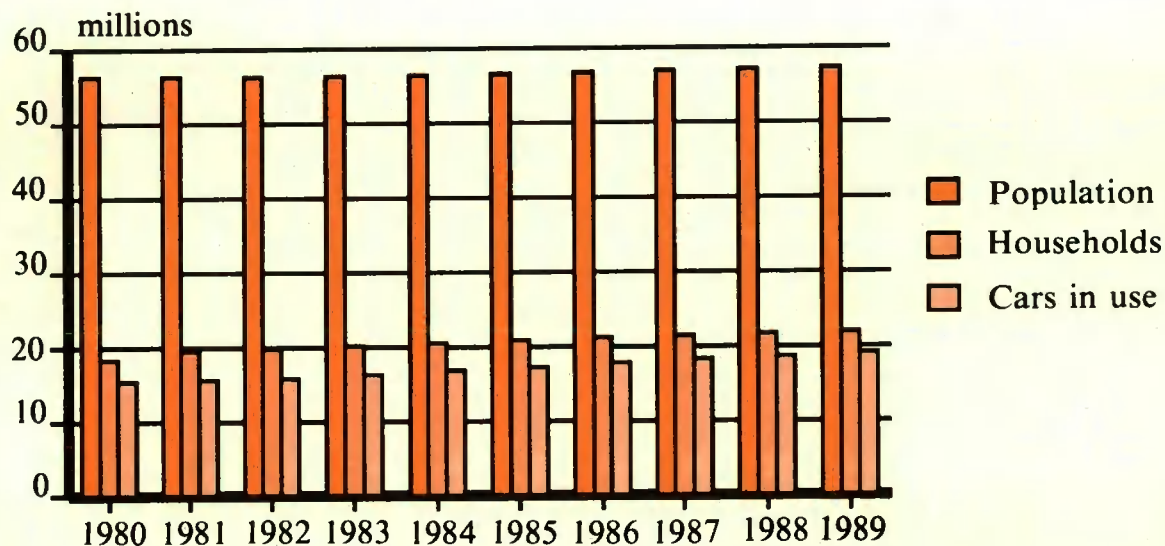
**Car registrations and ownership
per person in Europe**

**Registrations of new cars
in the UK by manufacturer**

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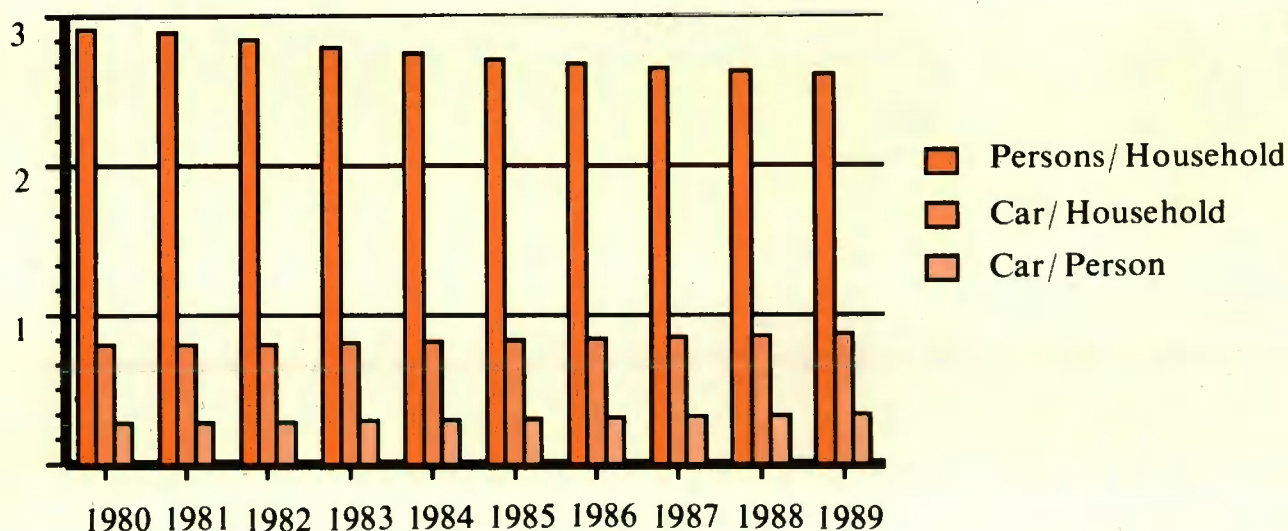
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Car ownership in the UK



Source: Population - OPCS, households - D.O.E.
Cars in use - DTp, incl est for NI
Excludes lapsed vehicles

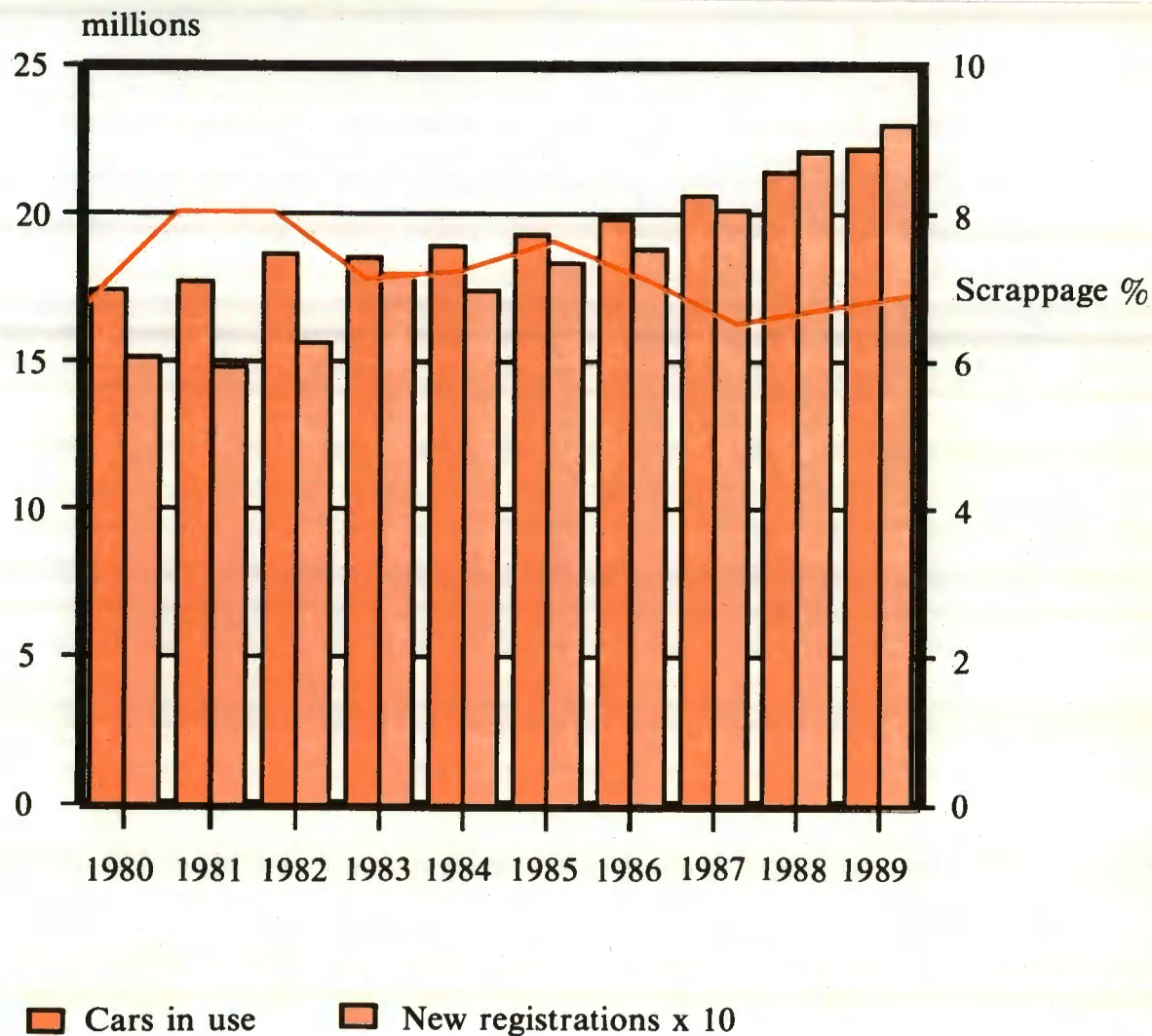
The population of the UK has remained almost static, the number of households has grown by 13%, whilst the number of cars in use has increased by 24%.



Households are getting smaller (10% decline in people per household) but the number of cars per household has grown by 9% and the number of cars per person by 22% over the decade.

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Growth in cars in use and scrappage in the UK

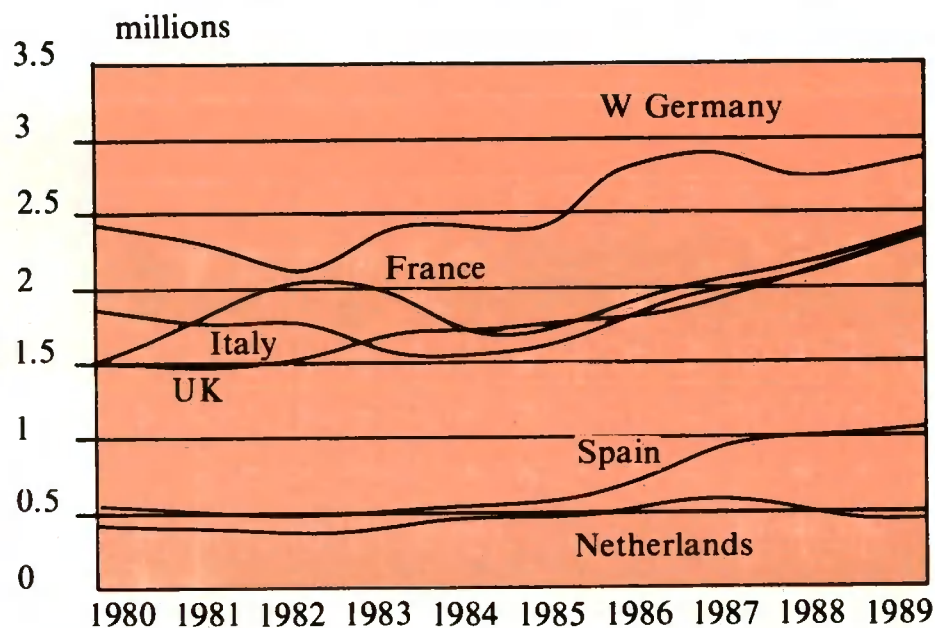


Source: Lex estimates based on SMMT data

A combination of rising new car registrations (up by 52% over the past ten years) and a falling scrappage rate means that the number of cars in use has risen by 27% over the decade.

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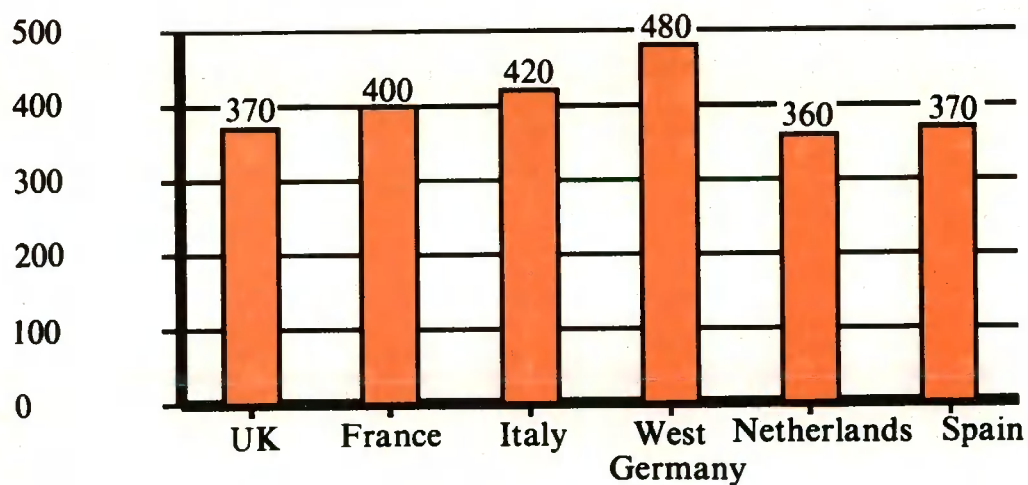
Registrations of new cars in major European countries



Source: SMMT from local statistics

All major markets have seen strong growth in demand for new cars during the past ten years.

Cars per 1000 population in Europe - 1988



Source: SMMT from local statistics

Although car registrations in the UK match France and Italy, we still lag behind in terms of car ownership per head.

Registration of new cars in the UK by manufacturer

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

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Source: Society of Motor Manufacturers and Traders

INTRODUCTION TO THE RESEARCH

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INTRODUCTION TO THE RESEARCH

The 1990 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 1,534 drivers in 174 constituency sampling points throughout Great Britain. Company car drivers and drivers in Scotland were boosted and the figures were then weighted using the proportions found in the MORI omnibus survey undertaken in June 1989, based on a sample of 1,973 people. All interviews were conducted face to face between 30th September and 14th October 1989.

The research followed the pattern established in the 1989 report and was designed to provide a detailed insight into Britain's drivers - who they are, how they behave and their attitudes and lifestyle. Many of last year's questions have been repeated so that we can understand how Britain's drivers are changing over the years. Significant trends between 1988 and 1989 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, provided reference is made to the 1990 Lex Report on Motoring.

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STATISTICAL PROFILES

Britain's drivers

Men and women

The young and the elderly

London and the rest of the country

Scotland and England/Wales

Company and private car drivers

STATISTICAL PROFILES

Profile of Britain's drivers

Britain's drivers are more likely to be male, middle-aged and middle class than the population as a whole.

Fifty seven per cent of men are regular drivers, compared with 43% of women, despite the fact that there are more women in the total population. There have been no significant changes over the past year.

There has been relatively little change in the demographics of Britain's drivers, compared with last year. There are slightly more "empty nesters" and retired people, with a corresponding drop in households with children, reflecting the general demographic trends. Two fifths (42%) of Britain's drivers are in households with children, compared with only 32% of the population as a whole.

In total, there are 21.3 million regular drivers representing 52% of the adult population over 17.

Statistical Profiles

The tables on pages 19 to 29 summarise the main results of the survey, comparing the results for key groups:

- Men and women
- The young and the elderly
- London and the rest of Britain
- Scotland and England/Wales
- Company and private cars

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Profile of Britain's Drivers

	<u>General Public</u> %	<u>Drivers (1988)</u> %	<u>Drivers (1989)</u> %
<u>Sex</u>			
Male	48	58	57
Female	52	42	43
<u>Age</u>			
17 - 24	16	11	12
25 - 34	18	26	25
35 - 54	31	38	38
55 - 64	15	14	13
65+	20	11	13
<u>Class</u>			
AB) middle	18) 41	24) 52	24) 49
C1) class	23)	28)	25)
C2) working	28) 59	31) 48	34) 51
DE) class	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	4
Married, no children in h/h (17-44) #	10	12	11
Married, children under 16 (17-64) #	30	40	38
Empty nesters (45-64)	21	18	19
Retired (65+)	20	11	13

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

includes other couples

Source: MORI Omnibus Survey for general public.
Lex Report on Motoring for drivers

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STATISTICAL PROFILES

Men versus Women

	<u>Men</u> (908)	<u>Women</u> (620)
<u>Profiles</u>		
Regular Drivers %	57	43
Company Car drivers %	74	26
	%	%
<u>Type of Car Bought</u>		
New	35	34
Nearly New	13	11
Second Hand	51	55
<u>Number of Cars in Household</u>		
One	61	48
Two or more	39	52
<u>Engine Size</u>		
Up to 1400cc	38	57
1401-2000cc	50	32
Over 2000cc	12	7
<u>Attitudes towards Driving</u>		
Find it difficult to adjust lifestyle to being without a car	84	79
Would use car less if public transport were better	32	32
<u>Environment Issues</u>		
Know what a catalytic converter does	62	33
Use lead free petrol	30	27
<u>Driving Misdemeanours</u>		
Overtaken on the inside lane	30	13
Driving through a red light	19	14
Driven in a bus lane in rush hour	16	6
Drinking & Driving	11	4
Had a race on a public road	9	2
Committed none of the 6 listed misdemeanours	44	64
Committed 3 or more	9	2

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Men versus Women (cont)

	<u>Men</u> (908) %	<u>Women</u> (620) %
<u>Attitudes to Drinking & Driving</u>		
Agree with random breath testing	78	91
Agree that legal drink/drive limit be reduced to no alcohol	60	69
Agree with prison sentences for drink/driving	42	50
<u>Attitudes towards Driving Tests</u>		
Extra test every 10 years	51	55
Extra test 1 year after 1st test	42	35
Extra test for high performance car drivers	71	74
<u>Congestion</u>		
Building more roads to ease congestion	27	17
Listen every day/most days to particular radio station for traffic up-dates	30	18
Sometimes avoid the motorway	53	54
Avoid motorway because of heavy congestion	71	55
Avoid motorway because of danger/dangerous drivers	16	26
<u>The Future</u>		
Channel Tunnel will not be completed by 2001	14	22
Likely to use the Channel Tunnel if it were open today	28	26
	<u>Mean</u>	<u>Mean</u>
<u>Behaviour</u>		
Annual Mileage	11,900 miles	8,100 miles
Annual mileage in connection with work	4,400 miles	1,600 miles
Length of Ownership	3.4 years	3.7 years

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STATISTICAL PROFILES

Young versus the Elderly

<u>Profiles</u>	<u>Young</u> (156)	<u>25-64</u> (1223)	<u>Elderly</u> (155)
Regular Drivers %	12	75	13
Company Car drivers %	6	94	1
	%		%
<u>Type of Car Bought</u>			
New	14		43
Nearly New	9		16
Second Hand	76		40
<u>Number of Cars in Household</u>			
One	43		84
Two or more	57		16
<u>Engine Size</u>			
Up to 1400cc	51		68
1401-2000cc	41		22
Over 2000cc	6		6
<u>Attitudes towards Driving</u>			
Find it difficult to adjust lifestyle to being without a car	76		83
Would use car less if public transport were better	29		31
<u>Environment Issues</u>			
Know what a catalytic converter does	45		46
Uses lead free petrol	16		22
<u>Driving Misdemeanours</u>			
Overtaken on the inside lane	38		6
Driving through a red light	26		4
Driven in a bus lane in rush hour	20		2
Drinking & Driving	7		4
Had a race on a public road	19		1
Committed none of the 6 listed misdemeanours	36		79
Committed 3 or more	13		-

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Young versus the Elderly (cont)

	<u>Young</u> (156) %	<u>Elderly</u> (155) %
<u>Attitudes to Drinking & Driving</u>		
Agree with random breath testing	83	79
Agree that legal drink/drive limit be reduced to no alcohol	64	59
Agree with prison sentences for drink/driving	43	42
<u>Attitudes towards Driving Tests</u>		
Extra test every 10 years	41	55
Extra test 1 year after 1st test	27	45
Extra test for high performance car drivers	60	86
<u>Congestion</u>		
Building more roads to ease congestion	33	26
Listen every day/most days to particular radio station for traffic up-dates	23	19
Sometimes avoid the motorway	32	69
Avoid motorway because of heavy congestion	73	54
Avoid motorway because of danger/dangerous drivers	16	27
<u>The Future</u>		
Channel Tunnel will not be completed by 2001	23	16
Likely to use the Channel Tunnel if it were open today	38	8
	<u>Mean</u>	<u>Mean</u>
<u>Behaviour</u>		
Annual Mileage	11,800 miles	5,700 miles
Annual mileage in connection with work	2,200 miles	300 miles
Length of Ownership	2.7 years	6 years

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STATISTICAL PROFILES

London versus Rest of Britain

	<u>London</u> (127)	<u>Rest of the Country</u> (1407)
<u>Profiles</u>		
Regular Drivers %	11	89
Company Car drivers %	12	88
	%	%
<u>Type of Car Bought</u>		
New	37	34
Nearly New	12	12
Second Hand	51	53
<u>Number of Cars in Household</u>		
One	55	55
Two or more	45	45
<u>Engine Size</u>		
Up to 1400cc	31	48
1401-2000cc	54	41
Over 2000cc	11	9
<u>Attitudes towards Driving</u>		
Find it difficult to adjust lifestyle to being without a car	66	84
Would use car less if public transport were better	45	30
<u>Environment Issues</u>		
Know what a catalytic converter does	49	49
Uses lead free petrol	31	28
<u>Driving Misdemeanours</u>		
Overtaken on the inside lane	36	21
Driving through a red light	23	16
Driven in a bus lane in rush hour	27	10
Drinking & Driving	11	8
Had a race on a public road	5	6
Committed none of the 6 listed misdemeanours	34	55
Committed 3 or more	8	6

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London versus Rest of Britain (cont)

	<u>London</u> (156) %	<u>Rest of the Country</u> (1407) %
<u>Attitudes to Drinking & Driving</u>		
Agree with random breath testing	74	84
Agree that legal drink/drive limit be reduced to no alcohol	51	66
Agree with prison sentences for drink/driving	36	47
<u>Attitudes towards Driving Tests</u>		
Extra test every 10 years	52	53
Extra test 1 year after 1st test	43	39
Extra test for high performance car drivers	73	72
<u>Congestion</u>		
Upgrading public transport to reduce congestion	67	46
Listen every day/most days to particular radio station for traffic up-dates	34	24
Sometimes avoid the motorway	62	52
Avoid motorway because of heavy congestion	68	61
Avoid motorway because of danger/dangerous drivers	18	21
<u>The Future</u>		
Channel Tunnel will not be completed by 2001	16	18
Likely to use the Channel Tunnel if it were open today	37	25
	<u>Mean</u>	<u>Mean</u>
<u>Behaviour</u>		
Annual Mileage	9,900 miles	10,400 miles
Annual mileage in connection with work	3,500 miles	3,300 miles
Length of Ownership	3.4 years	3.5 years

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STATISTICAL PROFILES

Scotland versus England/Wales

	<u>Scotland</u> (512)	<u>England/Wales</u> (1022)
<u>Profiles</u>		
Regular Drivers %	9	91
Company Car drivers %	7	93
	%	%
<u>Type of Car Bought</u>		
New	36	35
Nearly New	13	12
Second Hand	51	53
<u>Number of Cars in Household</u>		
One	64	54
Two or more	36	46
<u>Engine Size</u>		
Up to 1400cc	52	46
1401-2000cc	40	42
Over 2000cc	6	10
<u>Attitudes towards Driving</u>		
Find it difficult to adjust lifestyle to being without a car	81	82
Would use car less if public transport were better	31	32
<u>Environment Issues</u>		
Know what a catalytic converter does	41	50
Uses lead free petrol	31	28
<u>Driving Misdemeanours</u>		
Overtaken on the inside lane	24	23
Driving through a red light	18	17
Driven in a bus lane in rush hour	11	12
Drinking & Driving	4	9
Had a race on a public road	5	6
Committed none of the 6 listed misdemeanours	51	53
Committed 3 or more	4	6

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Scotland versus England/Wales (cont)

	<u>Scotland</u> (512) %	<u>England/Wales</u> (1022) %
<u>Attitudes to Drinking & Driving</u>		
Agree with random breath testing	91	83
Agree that legal drink/drive limit be reduced to no alcohol	80	62
Agree with prison sentences for drink/driving	45	46
<u>Attitudes towards Driving Tests</u>		
Extra test every 10 years	54	53
Extra test 1 year after 1st test	43	39
Extra test for high performance car drivers	76	72
<u>Congestion</u>		
Building more roads to ease congestion	29	22
Listen every day/most days to particular radio station for traffic up-dates	27	25
Sometimes avoid the motorway	43	54
Avoid motorway because of heavy congestion	63	62
Avoid motorway because of danger/dangerous drivers	18	21
<u>The Future</u>		
Channel Tunnel will not be completed by 2001	17	18
Likely to use the Channel Tunnel if it were open today	18	28
	<u>Mean</u>	<u>Mean</u>
<u>Behaviour</u>		
Annual Mileage	10,300 miles	10,400 miles
Annual mileage in connection with work	2,600 miles	3,300 miles
Length of Ownership	3.0 years	3.5 years

Lex Report On Motoring 1990

STATISTICAL PROFILES

Company Car Drivers versus Private Car Drivers

	<u>Company Car Drivers (437)</u>	<u>Private Car Drivers (1097)</u>
<u>Profiles</u>		
Regular Drivers %	12	88
	%	%
<u>Type of Car Bought</u>		
New	78	28
Nearly New	8	13
Second Hand	13	58
<u>Number of Cars in Household</u>		
One	35	58
Two or more	65	42
<u>Engine Size</u>		
Up to 1400cc	20	50
1401-2000cc	58	40
Over 2000cc	19	8
<u>Attitudes towards Driving</u>		
Find it difficult to adjust lifestyle to being without a car	90	81
Would use car less if public transport were better	23	33
<u>Environment Issues</u>		
Know what a catalytic converter does	69	47
Uses lead free petrol	56	24
<u>Driving Misdemeanours</u>		
Overtaken on the inside lane	44	20
Driving through a red light	20	16
Driven in a bus lane in rush hour	20	11
Drinking & driving	14	8
Had a race on a public road	10	5
Committed none of the 6 listed misdemeanours	33	55
Committed 3 or more	15	5

Lex Report On Motoring 1990

Company Car Drivers versus Private Car Drivers (cont)

	<u>Company Car Drivers</u> (437) %	<u>Private Car Drivers</u> (1097) %
<u>Attitudes to Drinking & Driving</u>		
Agree with random breath testing	82	84
Agree that legal drink/drive limit be reduced to no alcohol	59	65
Agree with prison sentences for drink/driving	38	46
<u>Attitudes towards Driving Tests</u>		
Extra test every 10 years	57	52
Extra test 1 year after 1st test	44	39
Extra test for high performance car drivers	67	73
<u>Congestion</u>		
Upgrading public transport to ease congestion	52	48
Listen every day/most days to particular radio station for traffic up-dates	41	23
Sometimes avoid the motorway	54	54
Avoid motorway because of heavy congestion	85	59
Avoid motorway because of danger/dangerous drivers	6	21
<u>The Future</u>		
Channel Tunnel will not be completed by 2001	18	18
Likely to use the Channel Tunnel if it were open today	39	25
	<u>Mean</u>	<u>Mean</u>
<u>Behaviour</u>		
Annual Mileage	19,400 miles	9,100 miles
Annual mileage in connection with work	13,700 miles	1,800 miles
Length of Ownership	2.2 years	3.7 years

Lex Report On Motoring 1990

BRITAIN'S DRIVERS

Annual mileages, including work mileages

Dependence on the car

Use of different forms of transport

Cost of running a car

Petrol tax versus road fund licence

BRITAIN'S DRIVERS

Annual mileages, including work mileages

On average, Britain's drivers say they drive 10,400 miles a year, close to the Department of Transport's estimate of 10,000 miles (16,000 km). A third (30%) drive less than 6,000 miles a year, compared with 4% who claim to travel over 30,000 miles. Average mileages have risen slightly compared with last year (10,400 against 10,200).

Men claim to do a higher mileage than women (11,900 against 8,100), while AB's do 12,200 compared with DE's 8,000 miles. Those living in Wales and the South West claim to drive the most miles (11,400), while those in the Midlands average only 9,400 miles.

Those who bought their cars new do a higher mileage than second hand owners (12,600 against 9,000). Company car drivers, where the car is provided by their employer, do the highest (21,100).

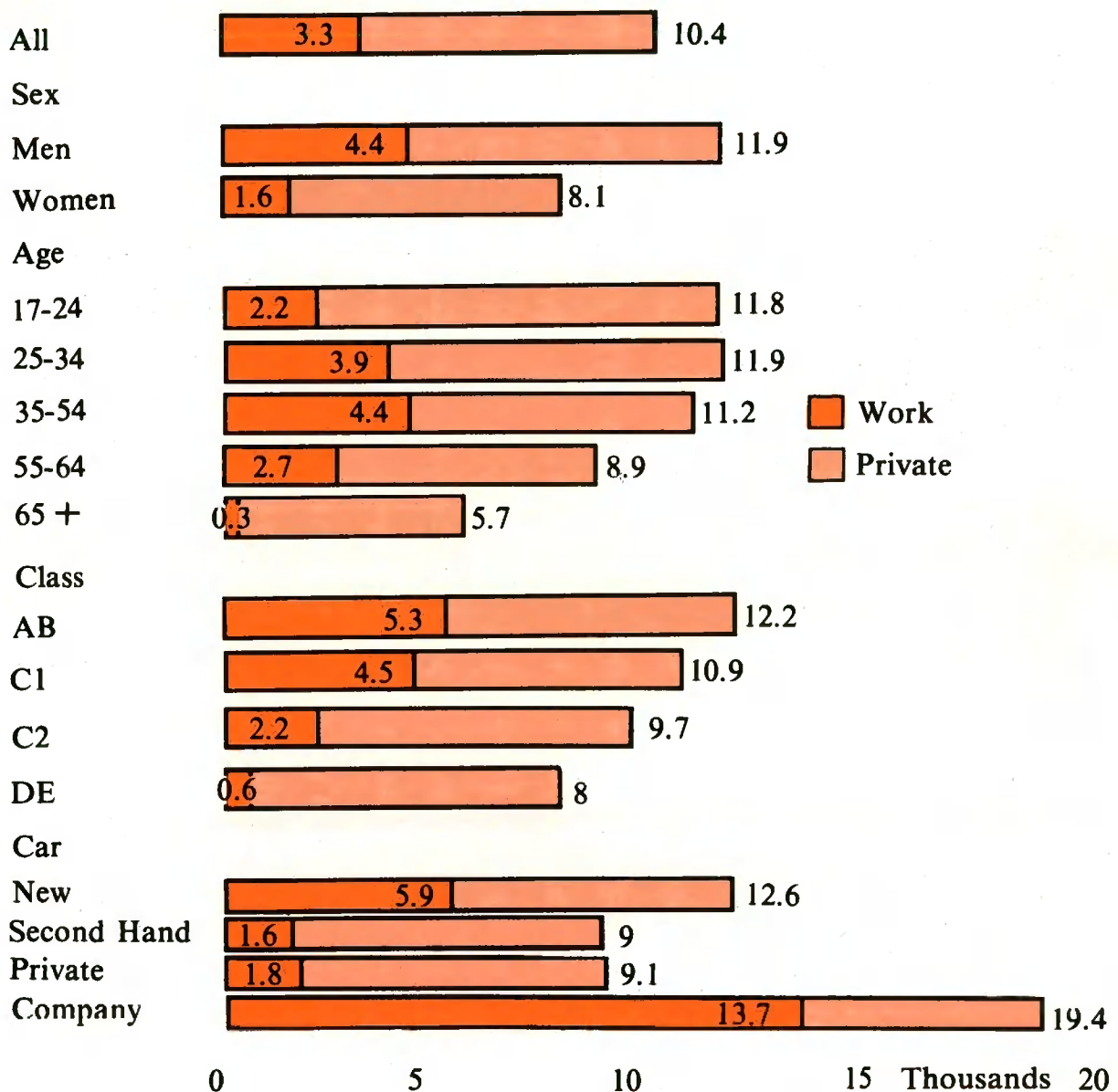
Twenty per cent of British drivers whose car driven most often is privately owned, use the cars in connection with their work, apart from driving to and from work. These drivers average 5,600 miles for their work. Company car drivers average 13,700 miles on business, rising to 15,000 business miles if they have a car provided by their employer. Only 7% of this group do under 2,000 business miles, suggesting that the vast majority of company cars are an essential requirement of the job.

Lex Report On Motoring 1990

ESTIMATES OF THE MILES CARS ARE DRIVEN PER YEAR

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

Q. And how many of these miles, if any, is the car driven in connection with your or someone else's work?



Lex Report On Motoring 1990

Dependence on the car

The majority of drivers still rely very heavily on their car with 82% saying that they would find it very difficult to adjust their lifestyle to being without a car. Three in five (58%) agree very strongly. Men (84%) and company car drivers (90%) are most likely to feel dependent on their car, whilst those in London are least dependent (66%).

There are signs of a slight move away from this dependency upon the car, with a two point drop compared with last year. This trend is confirmed by a nine point rise in those who would use their car less if public transport were better. However, 61% still would still use their car even if public transport were improved.

Use of different forms of transport

Use of public transport by Britain's car drivers remains low. Whilst 94% of drivers use their car every day or most days of the week, only 3% use buses and 2% use trains as frequently, although these figures are twice as high in London. Nearly a quarter of drivers never use buses, coaches or trains.

Use of different forms of transport

	Cars	Buses	Trains
Daily/most days	94%	3%	2%
At least once a week	6%	7%	4%
Less often	-	67%	70%
Never	-	23%	24%

Base: All regular drivers (1534)

Lex Report On Motoring 1990

Costs of running a car

British drivers perceive their annual running costs, including petrol/diesel, depreciation and running costs, to be about £1,600 per year, equal to approximately 15p per mile, although nearly a quarter felt unable to make an estimate. Fuel accounts for nearly £700 (43%). Both fuel and total costs rise with the size of car; total fuel costs are closely in line with estimated mileages (making allowances for average fuel consumption and costs of fuel).

Company car drivers estimate their cars cost £3,400 per year to run. When asked how much of an increase in salary they would require in lieu of a car, the average amount is £4,300. Two out of five (39%) of the 20% of drivers who use their private cars on company business receive a mileage allowance, the average amount paid being 28p per mile, suggesting that they are receiving a contribution towards the capital and interest costs as well as direct running costs.

Q. How much do you think the car you drive most frequently costs in total to run a year?

Q. And how much do you think you spend on petrol/diesel in a year?

	Fuel	Total
All	£680	£1580
Private Car	£590	£1365
Company Car	£1455	£3400

Average perceived cost per mile - 15.2p
Average perceived cost per mile (fuel) - 6.5p

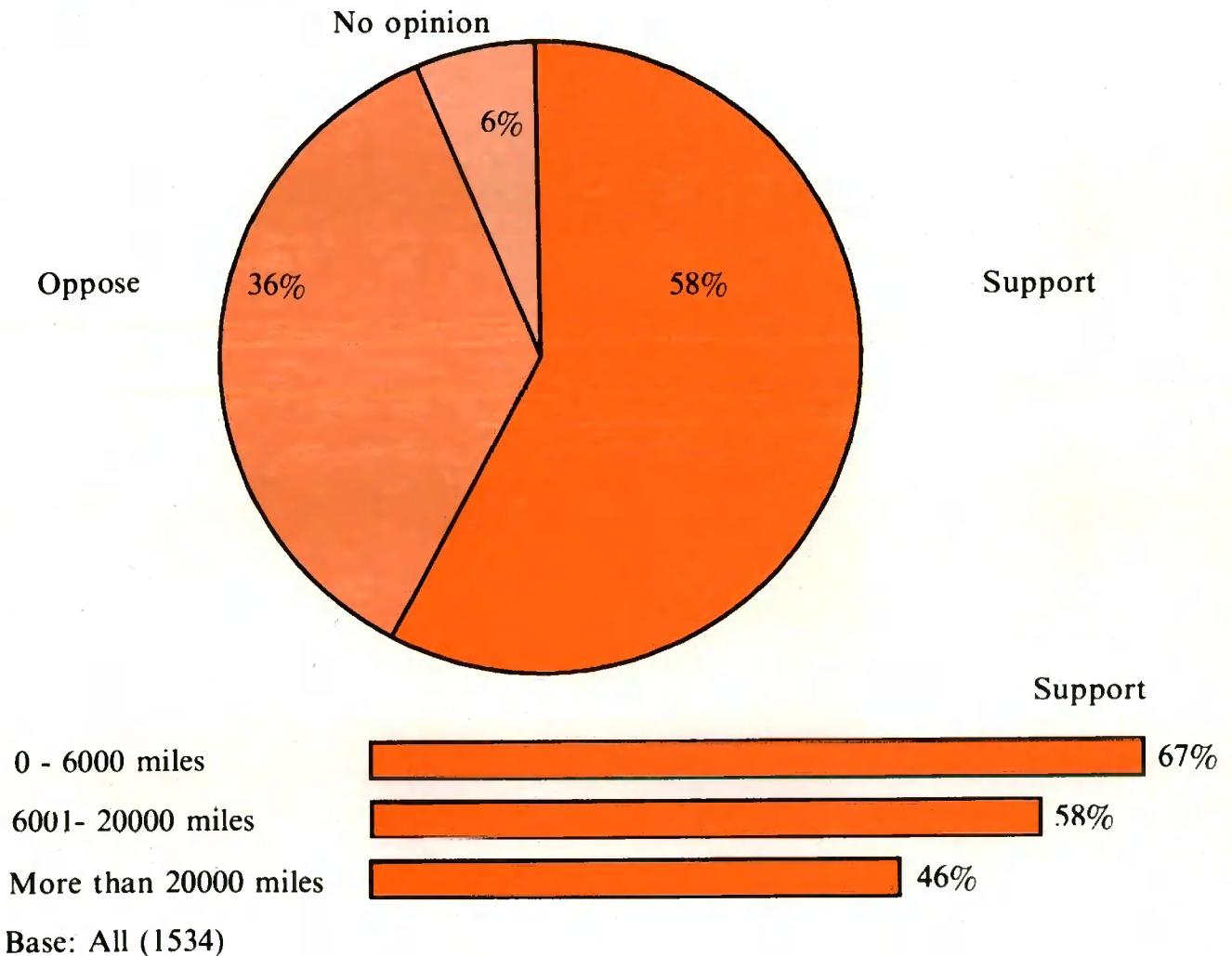
Base: All (1534)

Lex Report On Motoring 1990

Petrol tax versus road fund licence

Drivers were asked whether they would support a proposal to abolish the £100 road fund licence and replace it with a 25p per gallon fuel tax. For the driver doing the average 10,400 miles, the cost would be the same. The majority (58%) would support such a proposal, with strongest support, as expected, from those who do less than 6,000 miles, for whom there would be a potential saving of up to £75 per year, but as many as 46% of high mileage drivers (over 20,000 miles per year) would support it, at a cost penalty of £175.

Q. Would you support or oppose the abolition of the road fund licence, replacing it with a 25 pence tax on a gallon of petrol?



Lex Report On Motoring 1990

BRITAIN'S CARS

Profile of Britain's cars
Car ownership expectations

BRITAIN'S CARS

Profile of Britain's cars

All the drivers interviewed were asked if they had more than one car in the household. If they did, they were asked a number of questions about all the cars in their household, up to three cars. The total number of cars was 2,306.

A third of the cars on the road were bought new, 67% were bought second hand including 13% which were bought when they were under one year old. Most company cars are likely to be bought new, but 23% were bought as nearly new or used cars.

Nearly one half (46%) of Britain's cars have an engine smaller than 1400cc, compared with one in ten that are over 2000cc. Company cars tend to be larger, with the majority being between 1400 and 2000cc. One in five (19%) are larger than 2000cc.

The average age of the car is just under 5 years, although cars bought new are, on average, under 2½ years old. Again, company cars tend to be younger than privately owned ones.

Eighty five per cent of the cars on Britain's road were bought privately, while 14% of the total car population was provided by the respondent's employer or bought as a business expense.

Since 1988, Britain's cars have become younger (5.0 years compared with 5.2) and shifted towards larger engine sizes (54% over 1400cc, compared with 50% last year).

In the past two years, 44% of Britain's drivers had been responsible for buying a car. Of these 30% bought new cars and 70% bought used cars, including 15% who bought nearly new cars, under one year old.

Lex Report On Motoring 1990

Britain's cars

Base	<u>Cars</u> (2306) %	<u>New</u> (916) %	<u>Nearly New</u> (282) %	<u>Second hand</u> (1101) %	<u>Private</u> (1681) %	<u>Co. Cars</u> (597) %
Bought new	33	100	0	0	26	76
Bought nearly new	13	0	100	0	13	10
Bought second hand	54	0	0	100	60	13
<u>Engine Size</u>						
Up to 1400cc	46	44	43	48	50	20
1401 - 2000cc	41	42	43	39	38	57
Over 2000cc	10	10	9	10	9	18
<u>Type of Ownership</u>						
Bought privately	85	67	88	95	100	0
Company car/business expense	14	32	11	3	0	100
<u>Age of Car</u>						
0-3 years	36	75	48	10	29	82
3-6 years	27	15	35	33	30	12
Over 6 years	35	10	15	55	40	5
<u>Mean Age</u>						
1989	5.0	2.4	3.6	6.8	5.4	2.0
1988	5.2	2.6	6.5		5.6	2.3

Lex Report On Motoring 1990

Car ownership expectations

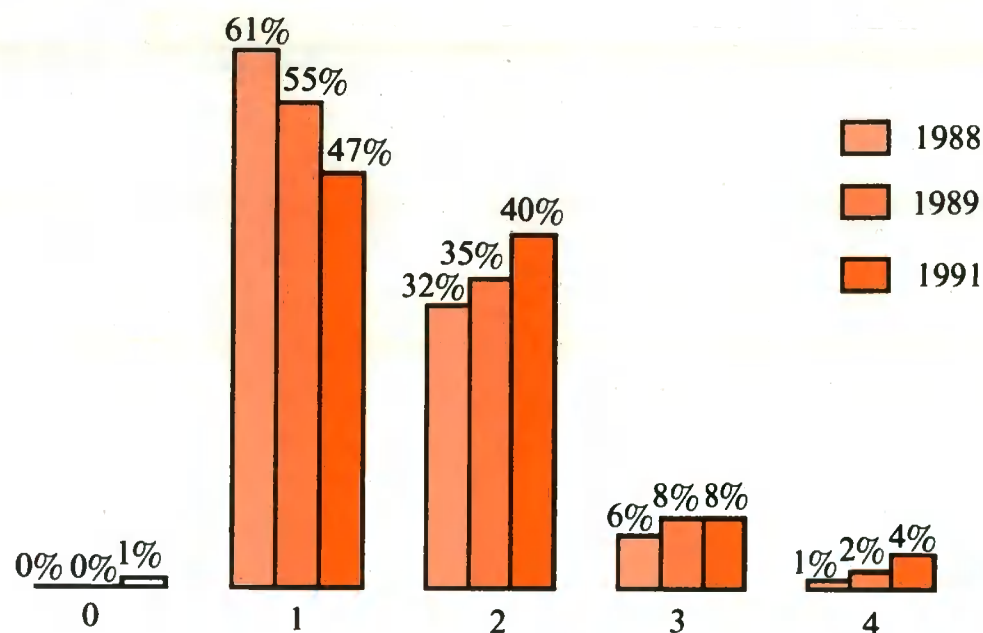
On average, there are 1.58 cars in each household containing at least one driver. This is predicted to rise to 1.67 within two years. Fifty five per cent of households currently have one car, 35% two cars and 10% three or more. Grossing this up, there were approximately 22½ million cars in Britain at the end of 1989. In two years' time, the proportion expecting to have two cars rises to 40% and for three cars or more 12%. Again, grossing up this figure, this predicts a total of 24 million cars in households with regular drivers by the end of 1991.

Households with an above average number of cars include those with company cars (1.84), young single males (2.32) and those in the South East/East Anglia (1.65). The Scots have the lowest average number of cars per household. Predicted ownership mirrors current ownership.

The increase in car ownership has been dramatic, with this year's figure for end 1989 almost matching last year's prediction for the end of 1990.

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 (1534)

COMPANY CARS

Number of company cars

Alternatives to company cars

Use of a company car and its perceived advantages

COMPANY CARS

The number of company cars

In view of the considerable interest in the size and composition of the company car market, the sample of company car drivers was boosted to 437 people (597 company cars), thus reducing the margin of error by a third. Furthermore, drivers were asked whether they ran their car as a business expense and whether the car was registered in their own or a company name.

Fourteen per cent of cars in the sample are company cars, 69% of which are provided by an employer and 31% are run as a business expense. The total number of company cars is estimated to be 3.1 million. This is closely in line with estimates made by Lex Vehicle Leasing, Lex Service's related contract hire company, which carried out research early in 1989 based on interviews with companies, rather than with individuals as in this research. Approximately a fifth of company cars (6% of "employer provided" and one half of "business expense" cars) are registered in the respondent's names, which helps to explain the higher proportion of company cars compared with the Department of Transport's figures, which show that 12.7% of all cars in use are registered in recognisable company names. The Department's figures include cars owned by daily rental companies, pool cars etc., estimated to be 0.3 million in total, which are not included in the 3.1 million company cars shown above.

Based on these figures, between 55% and 60% of all new car registrations are financed by a company or bought as a business expense.

Just over a fifth of company cars were bought nearly new or as used cars, 11% for employer provided cars and 48% for business expense, suggesting a much greater degree of choice and cost consciousness amongst the latter group.

Company cars

	Provided by employer (406)	Business expense (191)	All company cars (597)
Base: Company cars			
Type of car bought (million cars, end 1989)			
New	1.9	0.5	2.4
Nearly new	0.1	0.2	0.3
Used	<u>0.1</u>	<u>0.3</u>	<u>0.4</u>
Total	<u>2.1</u>	<u>1.0</u>	<u>3.1</u>
Type of car bought (per cent, end 1989 excluding don't know)			
New	88%	52%	77%
Nearly new	7%	16%	10%
Used	5%	32%	13%

Lex Report On Motoring 1990

Company cars

Base: All those whose main car is a company car	Provided by employer (311)	Business expense (126)	All company cars (437)
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Registered name (million cars, end 1989, excluding don't know)

Company	1.8	0.4	2.2
Other name*	0.2	0.1	0.3
Respondent	<u>0.1</u>	<u>0.5</u>	<u>0.6</u>
Total	<u>2.1</u>	<u>1.0</u>	<u>3.1</u>

Registered name (per cent, end 1989, excluding don't know)

Company	83%	37%	70%
Other name*	11%	10%	11%
Respondent	6%	53%	19%

* would include leasing companies

Three out of five company cars are in the 1400 to 2000cc, range, while over a quarter of business expense cars are over 2000cc, reflecting the high degree of choice.

One half (53%) of company car drivers are allowed to choose the make and model of the car, although most will presumably have a limit on budget. One in five (21%) are allowed a choice from a number of alternatives, while a quarter (26%) have the car chosen for them. Only a third (37%) of those who receive a car from their employer have a choice, compared with 81% for a business provided car.

Company cars

Base: Company cars	Provided by employer (406)	Business expense (191)	All company cars (597)
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Size of car (excluding don't know)

Less than 1400cc	21%	23%	22%
1400 - 2000cc	64%	50%	59%
Over 2000cc	15%	27%	19%

Choice of company car (excluding don't know)

Driver's choice	37%	81%	53%
No. of alternatives	30%	5%	21%
Chosen for driver	33%	14%	26%

Lex Report On Motoring 1990

Alternatives to company cars

Two in five (41%) of company car drivers would require an increase of salary of between £2,500 and £5,000 if they did not have company car. Overall, the average increase in salary in lieu of a company car is £4,300.

Salary increase in lieu of a company car

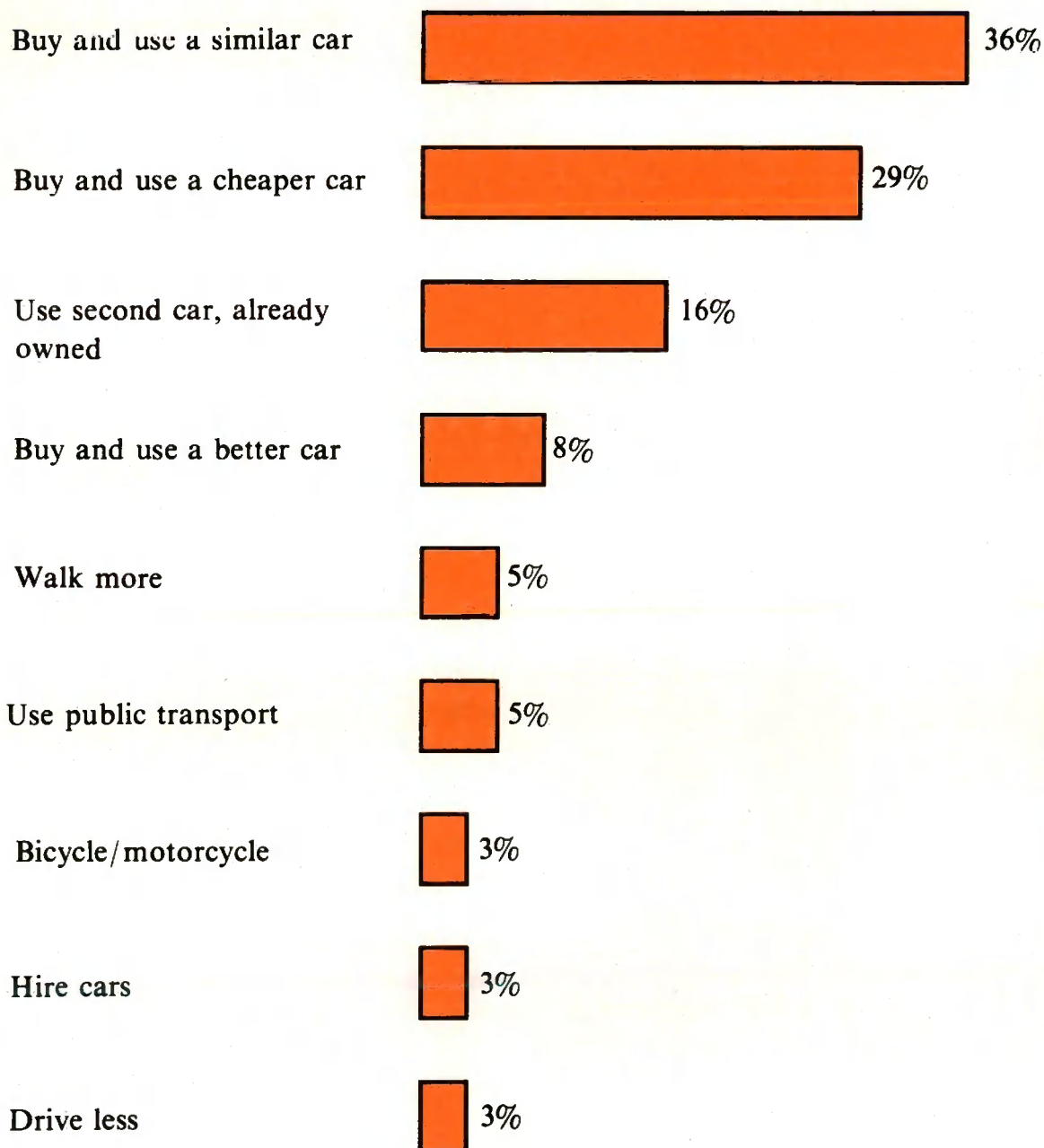
<u>Size of car driven</u>	(base 437)
Up to 1400cc	£3,000
1400 - 2000cc	£4,200
Over 2000cc	£5,800
Total	£4,300

There is a great dependency on the company car. Virtually none of the company car drivers surveyed would give up driving if they did not have a company car (less than ½%). The majority would use and buy a similar (36%) or cheaper (29%) car, while 8% would buy and use a better car. Only one in six (16%) would use a car they already own.

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ALTERNATIVES TO A COMPANY CAR

Q. If you did not have a company car which of the following would you do?



Base: Company Car Drivers (437)

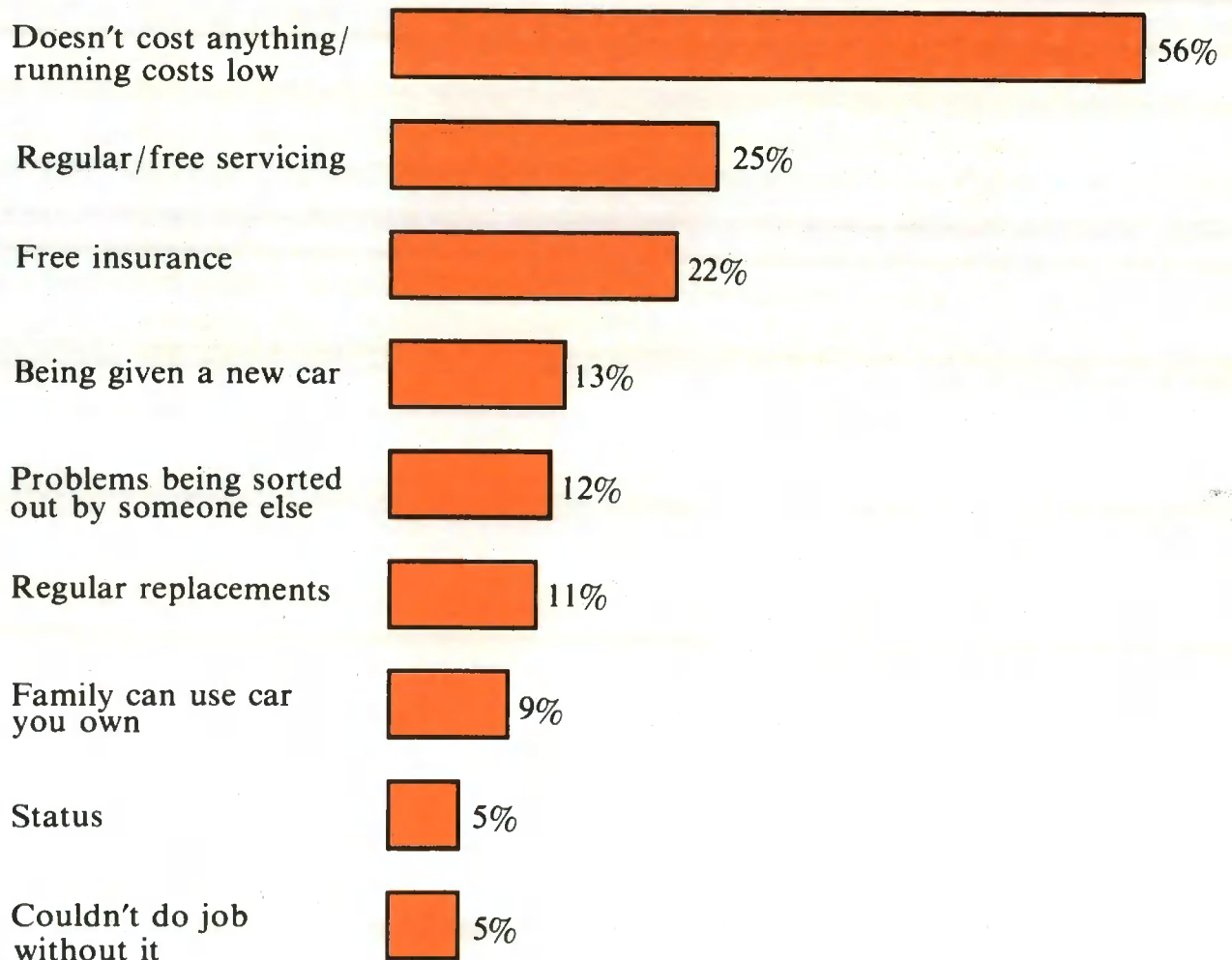
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Use of a company car and its perceived advantages

Almost all (86%) company car drivers have exclusive use of their car although one in ten say other employees have access to their car.

The most important advantage of a company car is that it does not cost the driver anything or that the running costs are low (mentioned by 56% of drivers). Free servicing and insurance are mentioned by 25% and 22% respectively.

Q. What do you see as the most important advantages of having a company car?



Base: All whose main car is a company car (437)

DRIVERS AND THE ENVIRONMENT

Use of unleaded petrol

Attitude towards catalytic converters

Environmentally friendly car manufacturers

Lex Report On Motoring 1990

DRIVERS AND THE ENVIRONMENT

Use of unleaded petrol

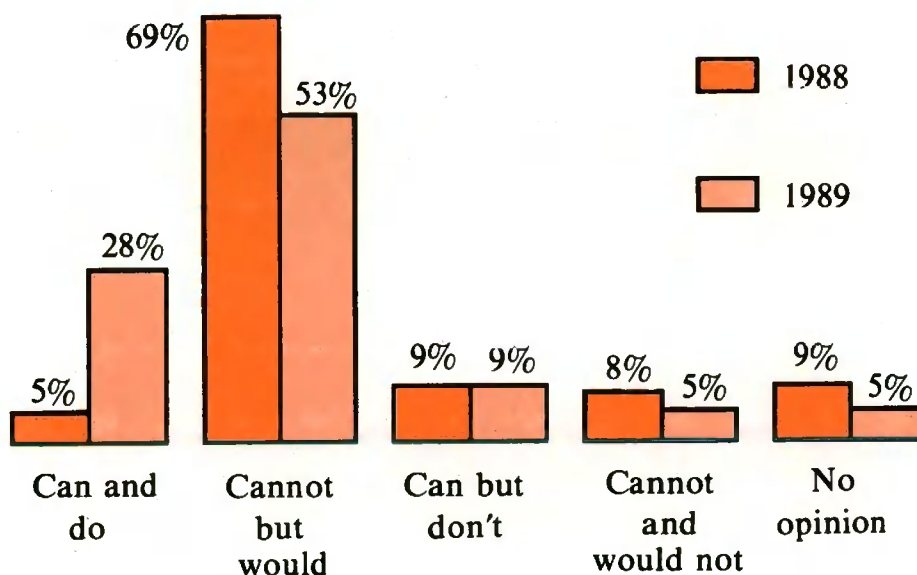
The largest shift in attitude and behaviour measured by this survey has been the use of unleaded petrol. Almost three in ten (28%) of Britain's drivers normally use unleaded petrol, compared with only 5% last year. This has been helped by heavy publicity raising environmental awareness, car conversion campaigns by manufacturers and dealers, increased availability of unleaded fuel and the 10p per gallon price differential introduced in the March 1989 budget.

Only one in ten (9%) who could run their car on unleaded petrol do not, the same proportion as last year. One half (53%) of those whose cars cannot run on unleaded petrol would use it if it were possible - a drop of 16% over last year, partly accounted for by some of last year's drivers now driving either adapted or different cars that can run on unleaded petrol. Overall, four in five (81%) of Britain's drivers do or would use unleaded petrol, a rise of seven points in the year. Only 5% of those whose cars cannot be driven on unleaded petrol would not use unleaded petrol, a three point drop since last year. The number of drivers not knowing whether their car can be adapted or not dropped by 14 points to 29%.

Q. Can your car run on unleaded petrol, or not?

Q. Do you usually buy it, or not?

Q. If you could run on unleaded petrol would you buy it or not?



Base: All (1534)

Attitude to catalytic converters

The majority (68%) of Britain's drivers have heard of catalytic converters. Four in five (79%) of men have heard about them compared with one half (53%) of women. Company car drivers are more likely (85%) to have heard of catalytic converters.

Three quarters (73%) of those who have heard of a catalytic converter are reasonably aware of what a converter does.

The majority of drivers would be willing to have a car fitted with a catalytic converter, although the willingness is dependent on cost. At a cost of £100, about one half would be at least fairly likely to fit one, at £200, only one quarter (26%) and at £500, only 5%. Company car drivers are less concerned about the cost of fitting - 13% would at a cost of £500.

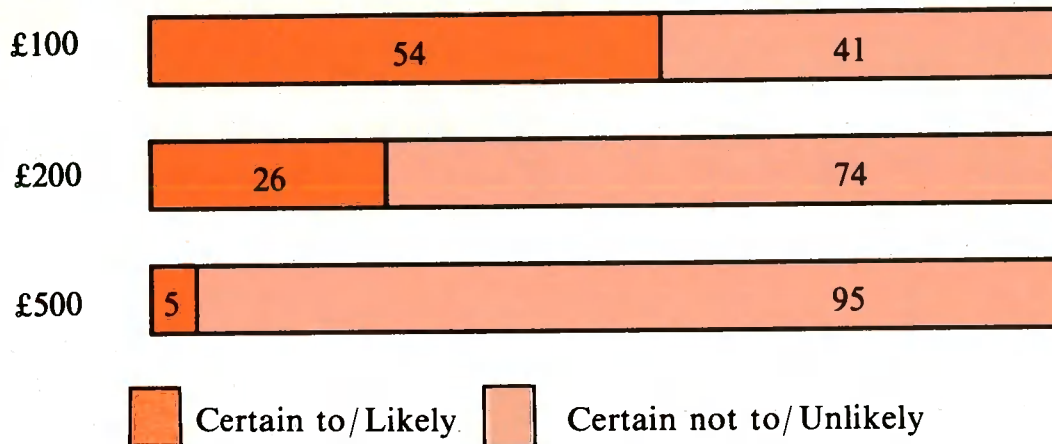
Most British drivers (88%) are in favour of the government requiring all cars to be fitted with catalytic converters, particularly in London and the South East. (92%).

Environmentally friendly car manufacturers

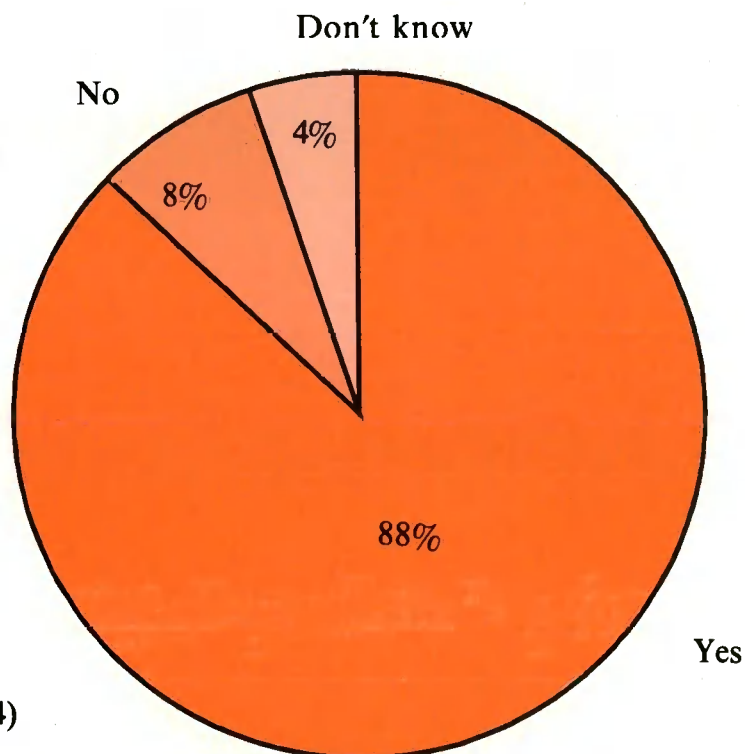
Drivers were asked which car manufacturers were doing a good job of trying to protect the environment. Only Ford (15%), Vauxhall (11%), Volvo (10%) and Audi Volkswagen (8%) got significant mentions. Three fifths (61%) were unable to name any environmentally concerned manufacturers.

CATALYTIC CONVERTERS

Q. If it were possible to have a catalytic converter fitted to your car how likely are you to have one fitted at a cost of:



Q. Do you think the government should require all new cars to be fitted with catalytic converters or not?



Base: All (1534)

Lex Report On Motoring 1990

SAFETY AND THE LAW

Driving misdemeanours

Misuse of disabled stickers

Attitudes towards the MOT test

Features that contribute most to road safety

Attitudes towards law enforcement

Driving tests

Children and seat belts

Dogs in cars

SAFETY AND THE LAW

Driving misdemeanours

Almost one half (46%) of Britain's drivers have committed at least one of six misdemeanours in the last six months. "Multi-offenders" (those who have committed at least three of the six misdemeanours within the last six months are more likely to be young single males (18%), company car drivers (15%) or those doing high mileage (15%). Women (64%), the elderly (79%) and low milers (69%) are most likely to have committed none of these misdemeanours. Londoners seem to be less law abiding with only 34% having committed none of these misdemeanours.

A quarter (23%) of those surveyed admit to having overtaken on the inside lane within the last six months. Grossing up, this is equivalent to 5 million drivers having overtaken on the inside lane.

The second most frequently committed offence, driving through a red traffic light, has been committed by 17% of drivers, a national total of 3.6 million drivers.

One in eight (12%) admit to driving in a bus lane during the rush hour; this rises to 27% in London.

One in ten (9%) say they have parked in a disabled space without being authorised, which grosses up to over two million drivers. Considering the relatively limited number of disabled parking spaces, it is not surprising that 69% of drivers think that there is a widespread misuse of disabled stickers

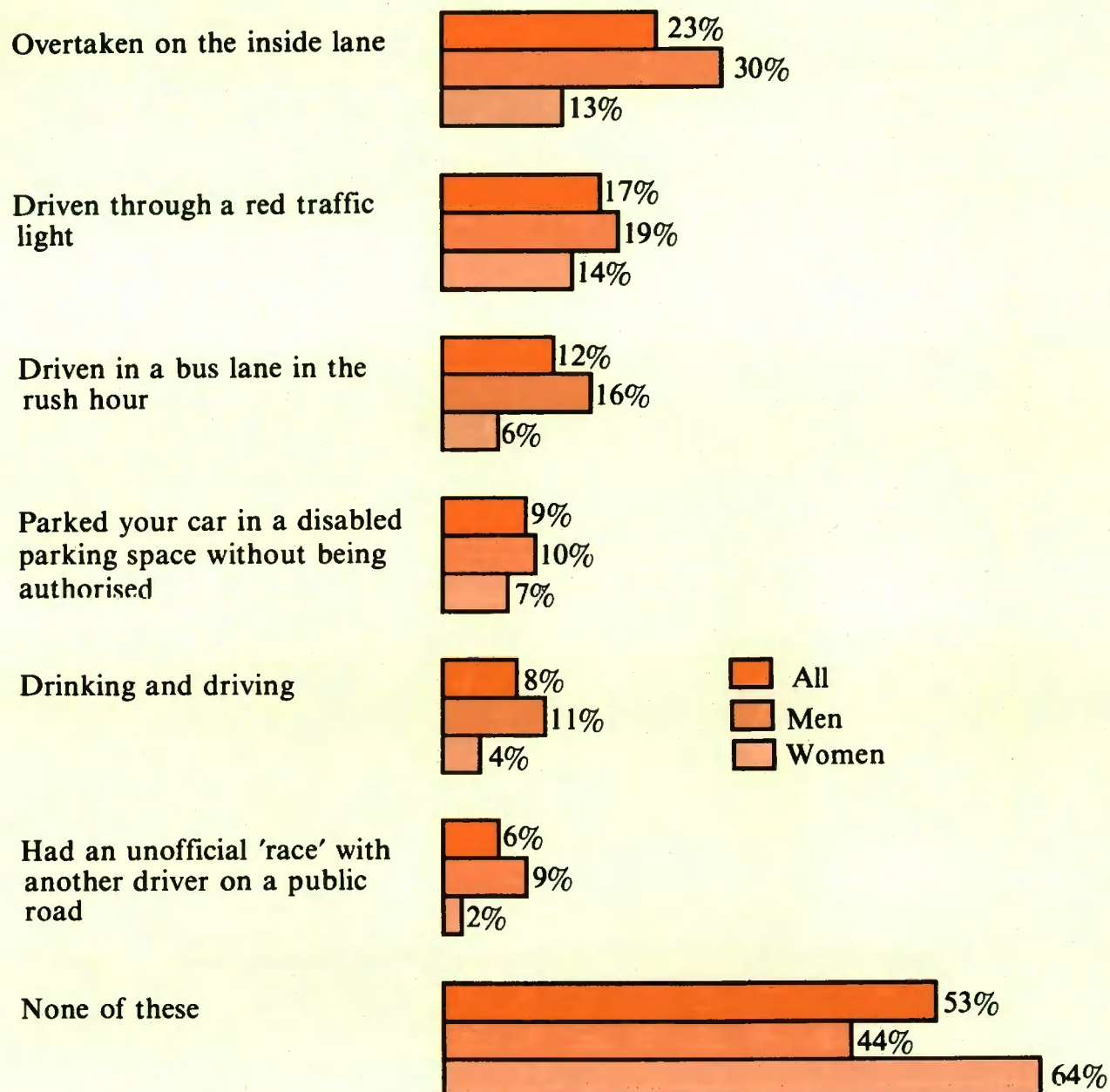
Eight per cent admit to drinking and driving, which amounts to approximately 1.7 million drivers. The middle aged and middle classes are most likely to admit to drinking and driving (11% and 15% respectively). Fourteen per cent of company car drivers admit to drinking and driving. Regionally the Scots are least likely to have committed this offence (4%), while those in London are most likely (11%).

Six per cent of drivers say they have had an unofficial race with another driver on a public road, particularly if they are young single males (31%).

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LAW BREAKING

Q. Which, if any, of these have you knowingly done within the last 6 months?



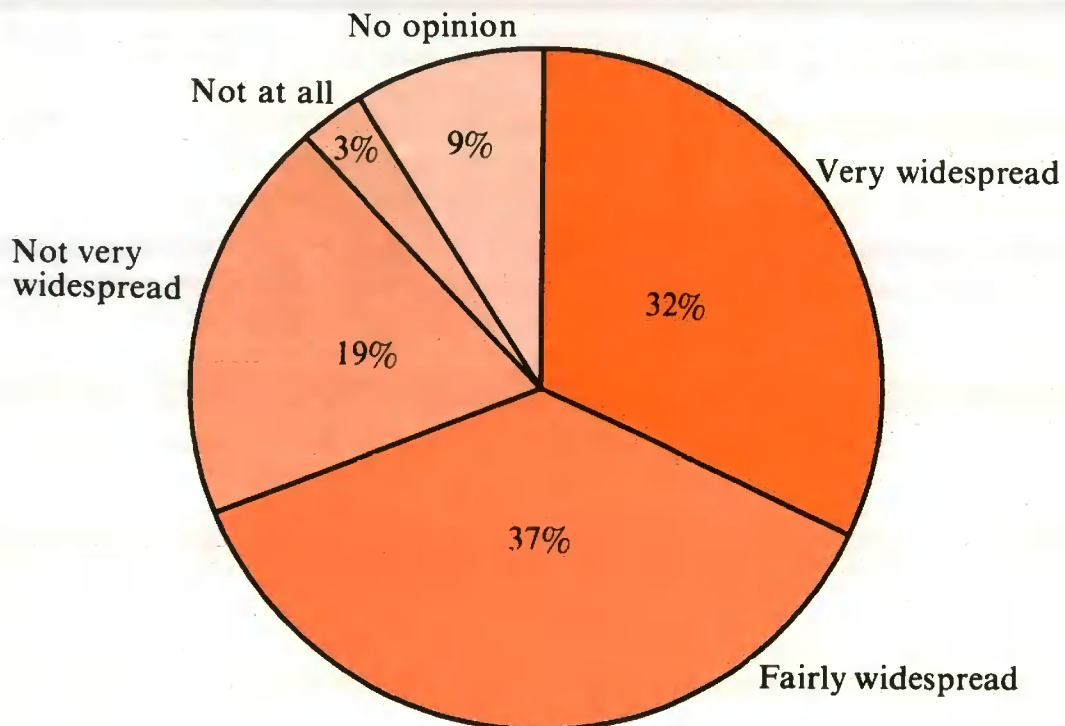
Base: All (1534)

Lex Report On Motoring 1990

Misuse of disabled stickers

Over two thirds (69%) of drivers feel there is a widespread misuse of disabled stickers, for example drivers who are not disabled using disabled stickers to secure parking places.

Q. How widespread do you think the misuse of disabled stickers is
- ie users who are not disabled using disabled stickers to use reserved parking spaces?



Base: All (1534)

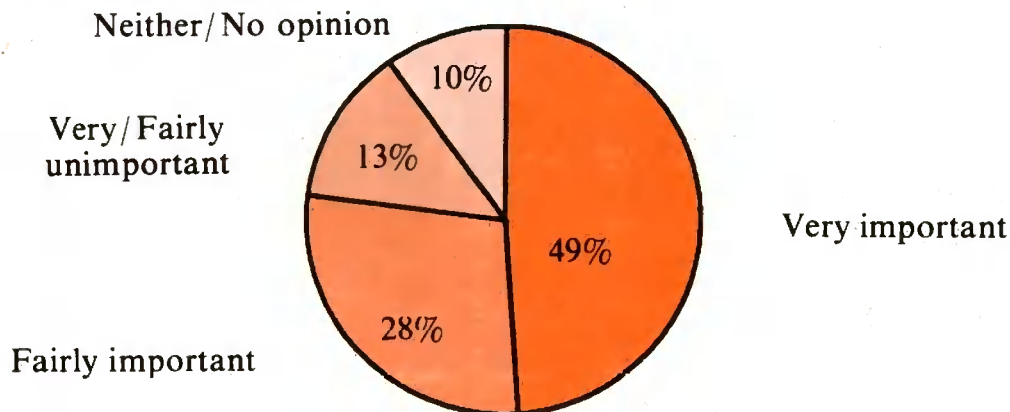
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Attitudes towards the MOT test

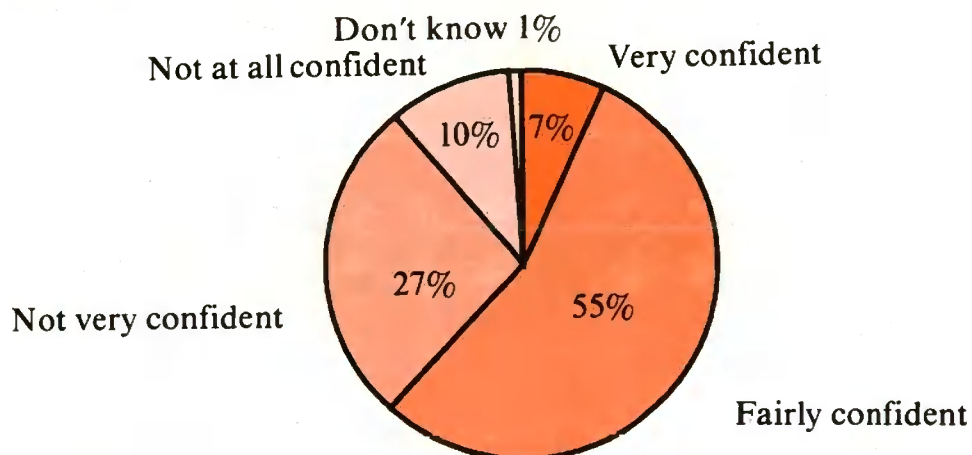
Although most drivers rate a long MOT certificate as important, only 7% are confident that the MOT test ensures that cars are safe to drive on the road. Over a third (37%) are not very or not at all confident about the test.

Overall, three quarters (77%) believe a long MOT certificate to be important when buying a used car, compared with only 14% rating it as unimportant. One half (49%) think that a long MOT certificate is very important compared to only 4% who say it is very unimportant. Those who have used car are more likely to feel that a long MOT certificate is important.

Q. If you were buying a used car, how important would it be to you that the car had a long MOT?



Q. How confident are you that cars that pass the MOT are safe to drive on the public road?



Base: All (1534)

Lex Report On Motoring 1990

Features that contribute most to road safety

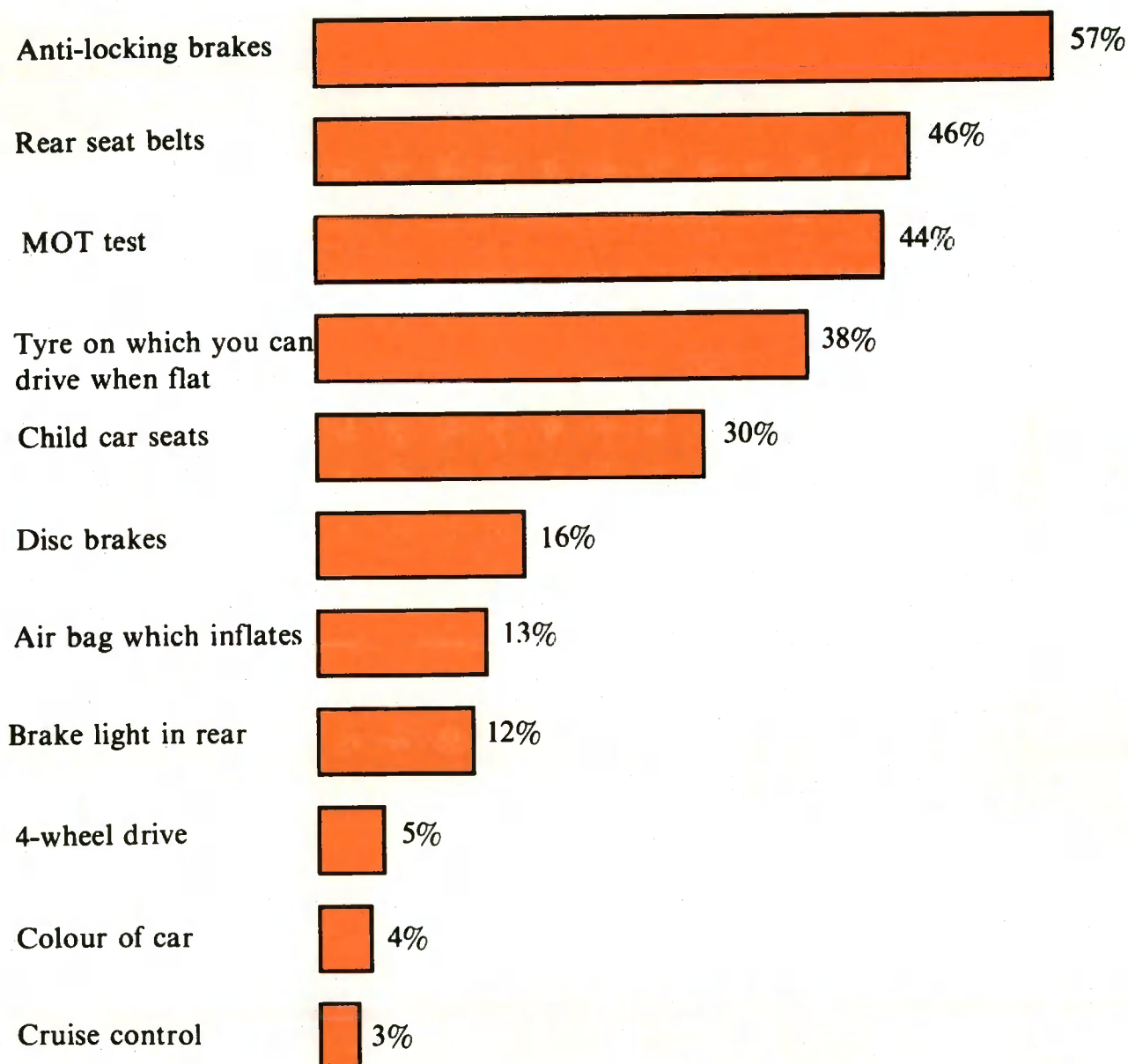
Almost three in five (57%) of Britain's drivers think anti-locking brakes are one of the most important contributors to road safety, followed by rear seat belts (46%) and the MOT test (44%).

Men are more concerned than women about anti-lock brakes (62% compared with 50%), but women are more likely to think rear seat belts make an important contribution to safety (54% against 41%). High milers and company car drivers are most likely to see anti-locking brakes as an important safety contributor (76% and 67% respectively), while those with children pick rear seat belts (56%).

Two in five (38%) feel that tyres on which you can drive when flat make an important contribution to road safety, a surprisingly high percentage, since this feature has not been in the public eye since the demise of Dunlop's Denovo tyres in the 1970's.

Lex Report On Motoring 1990

Q. Which two or three things do you think contribute most to road safety?



Base: All (1534)

Lex Report On Motoring 1990

Attitudes towards law enforcement

Drinking and driving

Most British drivers (83%) are in favour of the introduction of random breath tests. Over one half (56%) strongly agree with its introduction, while only 5% strongly disagree.

Opinion is divided (46% against 43%) as to whether prison sentences should be introduced for anyone caught driving with more than the legal limit of alcohol in their blood.

Almost two thirds (64%) of drivers favour reducing the legal drink-drive limit to no alcohol at all, with three in ten opposed to this idea.

Those drivers who have admitted to drinking and driving within the last six months are less likely to be in favour of hard line drink-drive measures than drivers as a whole. While a majority (62%) agree that random breath testing should be introduced, only 39% want the limit to be reduced and 18% feel that those caught over the limit should receive prison sentences

Driving through red lights

Three quarters (73%) of Britain's drivers approve of the idea of cameras at junctions to catch drivers jumping red lights.

Wheel clamps

Only a third (36%) agree with the introduction of wheel clamps throughout Britain and 51% disagree. Drivers in London, normally opposed to hard-line policies, are more likely to be in favour of wheel clamps (47% agree, 44% disagree), possibly feeling that the rest of the country should suffer what is now a major deterrent in London.

Overall attitude to increased control

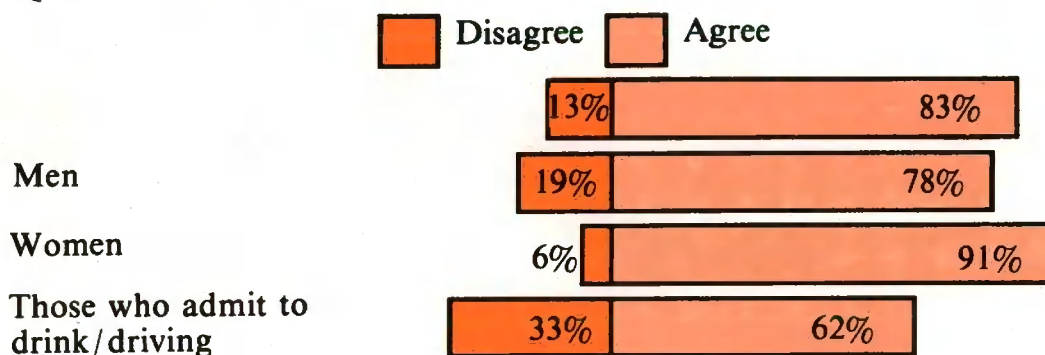
Only 4% of drivers do not at least tend to agree with one of the proposals for increased controls on drink-driving, jumping red lights and the increased use of wheel clamps.

With all these questions, women are more likely to favour a hard line approach, while AB social classes, company car drivers and those living in London are more likely to oppose these measures.

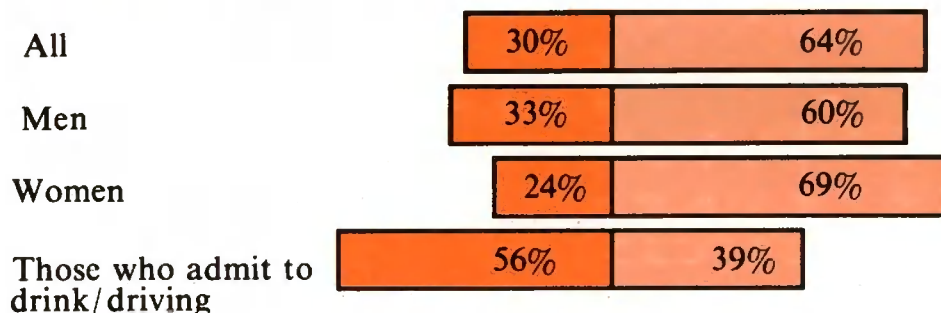
Lex Report On Motoring 1990

DRINKING AND DRIVING

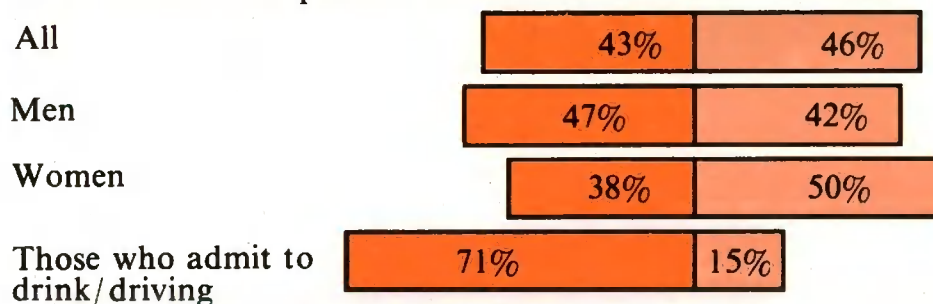
Q. Random breath testing should be introduced



Q. The legal drink/drive limit should be reduced to no alcohol at all

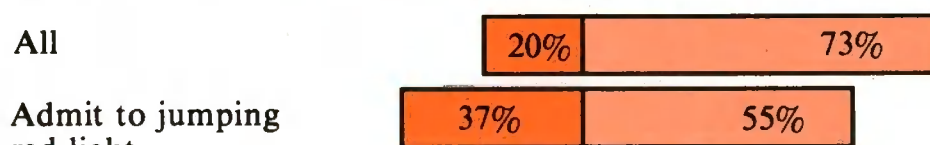


Q. Everyone who is caught with more than the legal limit in his/her blood should receive a prison sentence



RED LIGHT JUMPING

Q. Cameras should be positioned to catch people who drive through red lights



Base: All (1534)

LEX
SERVICE

Source: Lex Report On Motoring 1990/MORI

Lex Report On Motoring 1990

Driving tests

Only 55% of British drivers think that the current driving test is effective in ensuring that newly qualified drivers are safe and competent road users. A third (32%) think the driving test is ineffective

Those who are most likely to have had recent experience of the test, 17 - 24 year olds, are more likely to feel the test is effective (61%), yet only a third (34%) of those who use the roads most think that the test produces safe and competent drivers.

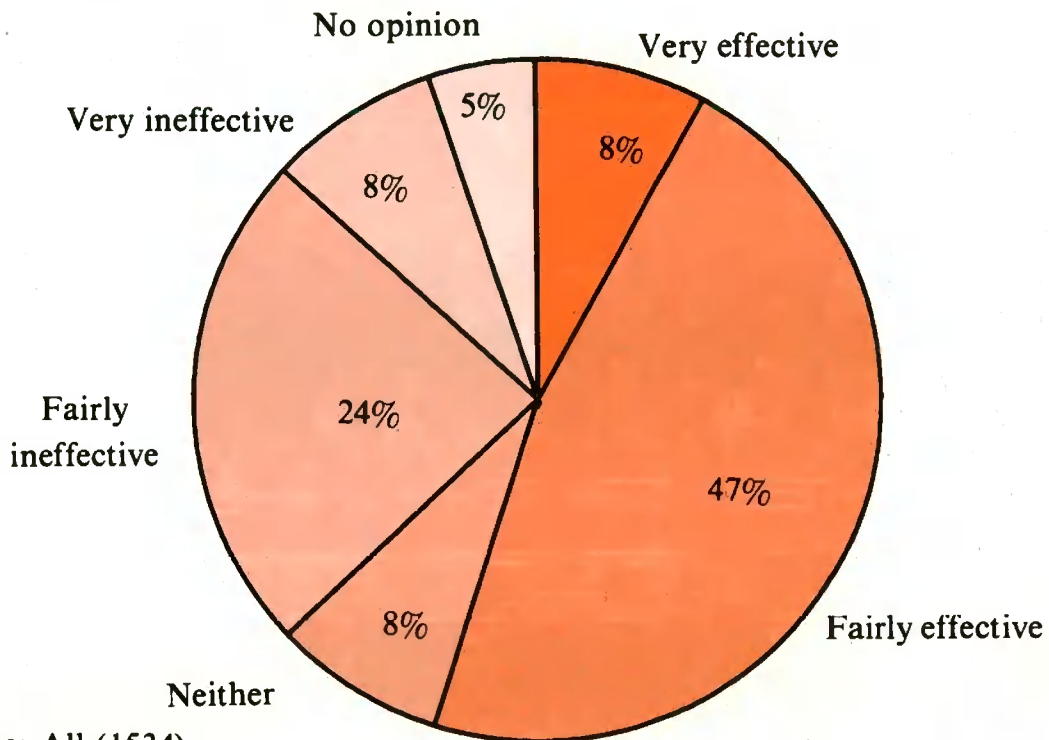
Over half of British drivers (53%) agree with the proposal that drivers should be required to take a driving test every 10 years, while almost two in five (37%) disagree. Drivers under 24, who are likely to have taken the test recently are less likely to agree with further tests.

British drivers are less convinced with the idea that all drivers should be required to take an advanced driving test one year after passing the current test, only 39% agree, whilst 46% disagree. Again, the young are most likely to disagree with a further test.

When it comes to controlling the high performance driver, however, a majority of British drivers (72%) agree with the introduction of an advanced test specifically for those who own such a vehicle.

THE CURRENT DRIVING TEST

Q. How effective do you think the current driving test is in ensuring that newly qualified drivers are safe and competent road users?



Base: All (1534)

Lex Report On Motoring 1990

Children and seat belts

Only a very small minority of British drivers would allow a two year old child to sit in the front seat of a car, while 22% would allow a seven year old. The majority (71%) would allow a twelve year old to travel in the front seat. Children in front seats would be expected to wear a seat belt.

The majority (58%) of two year olds would be expected to sit in the back in a child seat. Seven year old children are likely to wear a child seat belt, but by the age of twelve, the majority of children would wear an adult seat belt if they were sitting in the back of a car.

However, 3% of drivers would not use a seat belt or child seat - equivalent to at least 600,000 unrestrained children in cars.

- Q. If you were to drive with a child in your car, would you allow them to sit alone in the front seat of your car or not?

Age of child

	<u>Two</u>	<u>Seven</u>	<u>Twelve</u>
	<u>%</u>	<u>%</u>	<u>%</u>
Yes	4	22	71
No	95	77	28

Base: All drivers (1534)

- Q. If they were travelling in the back seat of your car, which of these would you expect them to do?

Age of child

	<u>Two</u>	<u>Seven</u>	<u>Twelve</u>
	<u>(1469)</u>	<u>(1196)</u>	<u>(426)</u>
	<u>%</u>	<u>%</u>	<u>%</u>
Wear adult seat belt	4	19	64
Wear adult seat belt with a booster cushion	7	20	9
Wear child seat belt	27	50	17
Sit in child seat	58	4	*
Not wear seat belt	2	4	3
Don't know	2	3	7

Base: All drivers who would not allow a child to sit in front seat.

Lex Report On Motoring 1990

Dogs in cars

Over a quarter (28%) of British drivers have taken a dog in their car in their car within the last month. Over one half (56%) allowed the dog to remain free when driving, one in five used a dog guard to restrict the dog to the rear of the car.

Q. In what way did you secure your dog?

	Total (429) %
Not secured/free in car	56
Restricted to back of car using gate/guard	20
Held/controlled by passenger	11
On a lead which is tied to something in the car	5
Put in secure box/basket	3

Base: All those who have taken a dog in their car within the last month (428)

Lex Report On Motoring 1990

CONGESTION

The problem

Easing congestion

Use of road traffic reports

Use of motorways

Road signs

Provisions for cyclists and pedestrians

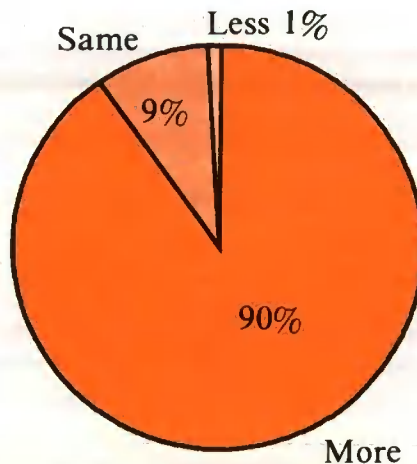
Lex Report On Motoring 1990

CONGESTION

The problem

Nine out of ten drivers think the roads have become more congested over the past two years, particularly if they live in the South East (95%).

Q. Over the past two years, do you think the roads have become more congested?



Base: All (1534)

The average time added to journeys because of congestion in a typical week is 1 hour 10 minutes - this rises to over two hours in London. This means that almost 25 million hours per week or 1,300 million hours per year are wasted by car drivers because of congestion. This excludes the effect of congestion on commercial vehicles.

Added time per week due to congestion

	Total (1534) %		Average (hours)
None	27	All	1.2
Up to 1 hour	36		
1 - 2 hours	14	Company car	2.3
2 - 3 hours	7		
3 - 4 hours	3	London	2.1
4 - 5 hours	3	Scotland	0.8
Over 5 hours	5		

Base: All drivers

LEX
SERVICE

Source: Lex Report On Motoring 1990/MORI

Lex Report On Motoring 1990

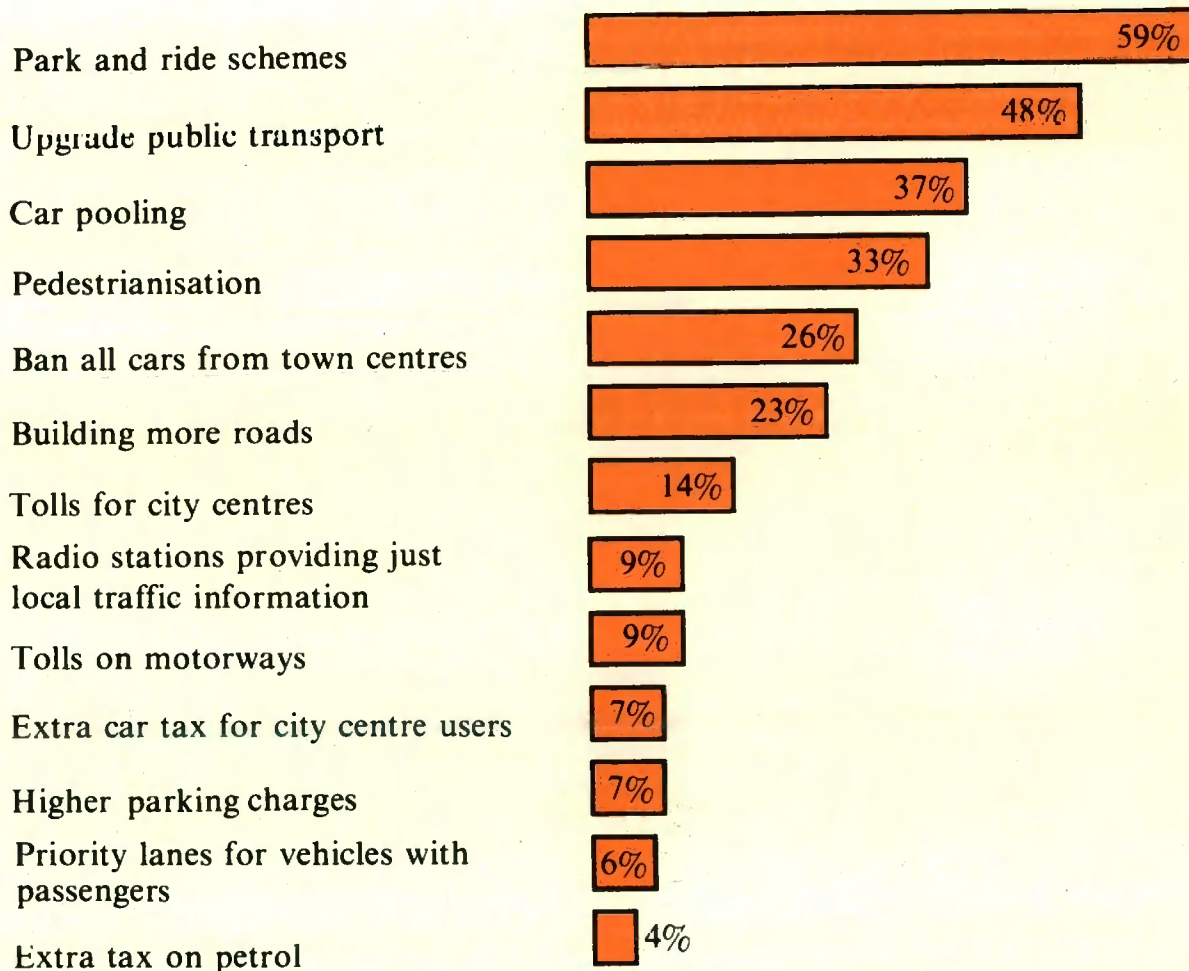
Easing congestion

British drivers are more likely to want positive measures introduced to control congestion in major cities, such as park and ride schemes, rather than restrictions, such as banning all cars from town centres.

The most popular suggestion is park and ride schemes (59%), followed by upgrading of public transport (48%), particularly in London where it rises to 67%. The third most popular measure (37%) is car pooling.

EASING CONGESTION

Q. Which of these, if any, do you think should be introduced or encouraged to help ease congestion in Britain's major cities?



Base: All (1534)

Lex Report On Motoring 1990

Use of road traffic reports

A quarter of Britain's motorists make a point of listening to a particular radio station most days in order to hear the traffic reports. High milers, company car drivers and those living in London are more likely to listen most days.

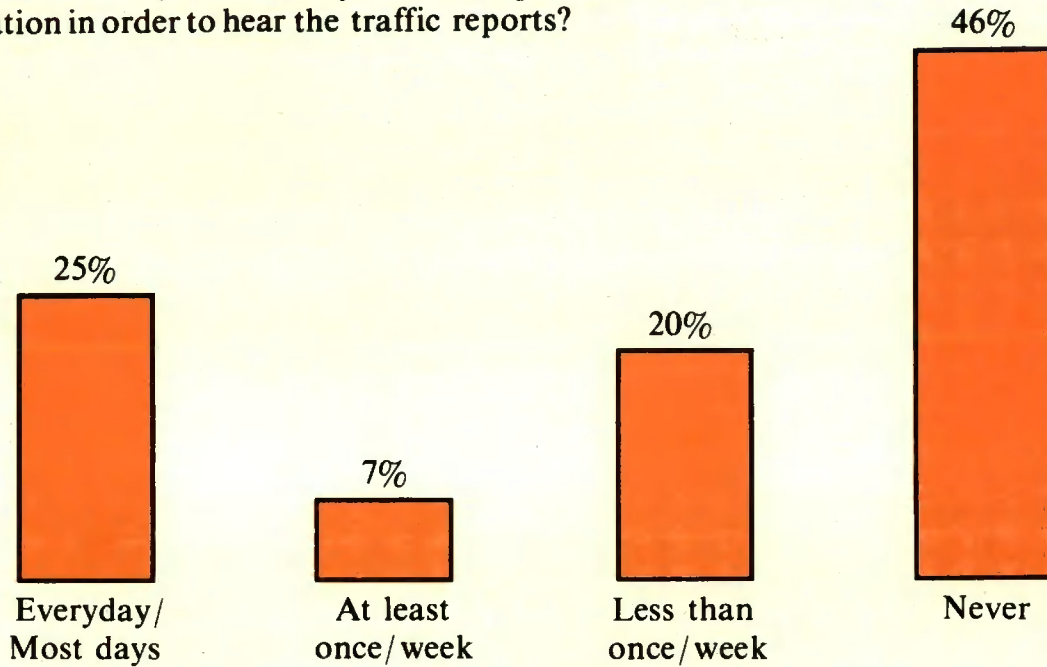
Most drivers (88%) who listen to traffic reports at least once a month think that they are at least fairly reliable, with a quarter describing them as very reliable and only 3% saying that they are very unreliable.

However, the majority (63%) of drivers would not be likely to use a radio station which was entirely devoted to providing local traffic reports. Drivers are more favourable towards the idea of an option that would interrupt programmes on your radio to bring you important local traffic news - two thirds (66%) would be at least fairly likely to use this. (Note such a service, Radio Data Service, is now available in most of Britain, but requires a special radio.)

Lex Report On Motoring 1990

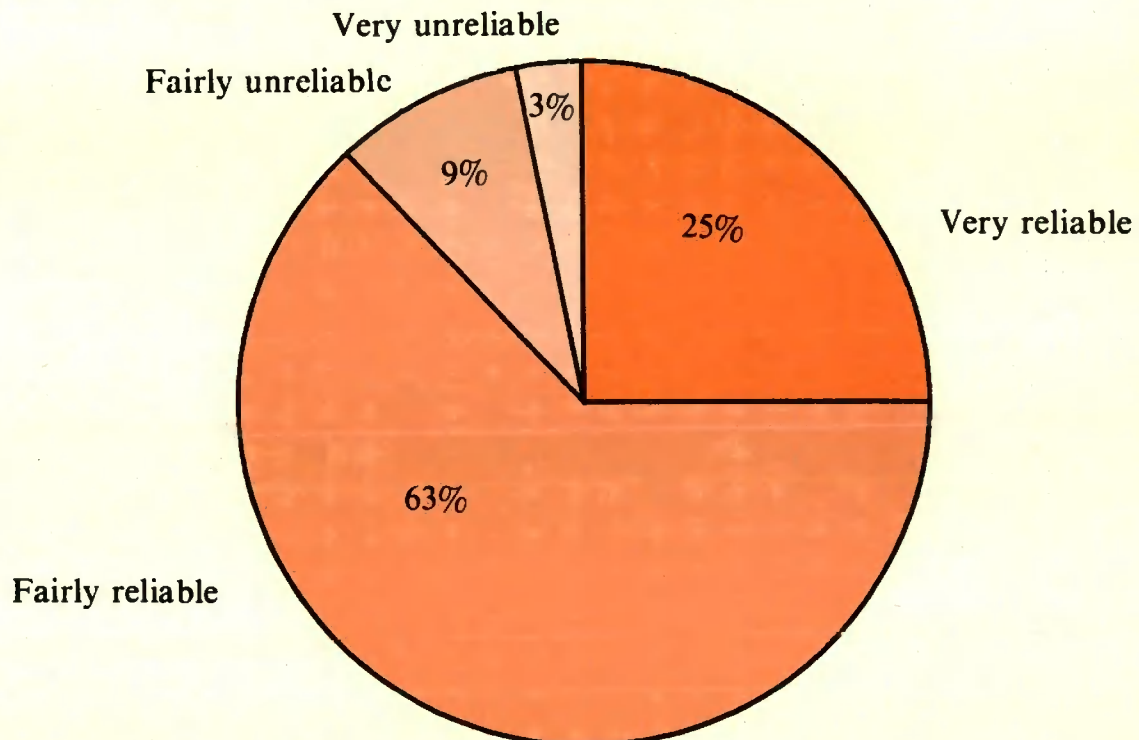
RADIO TRAFFIC REPORTS

Q. How often, if at all, do you make a point of listening to a particular radio station in order to hear the traffic reports?



Base: All (1534)

Q. How reliable do you think the traffic reports are?



Base: All who listen at least once a month (662)

LEX
SERVICE

Source: Lex Report On Motoring 1990/MORI

Lex Report On Motoring 1990

Use of motorways

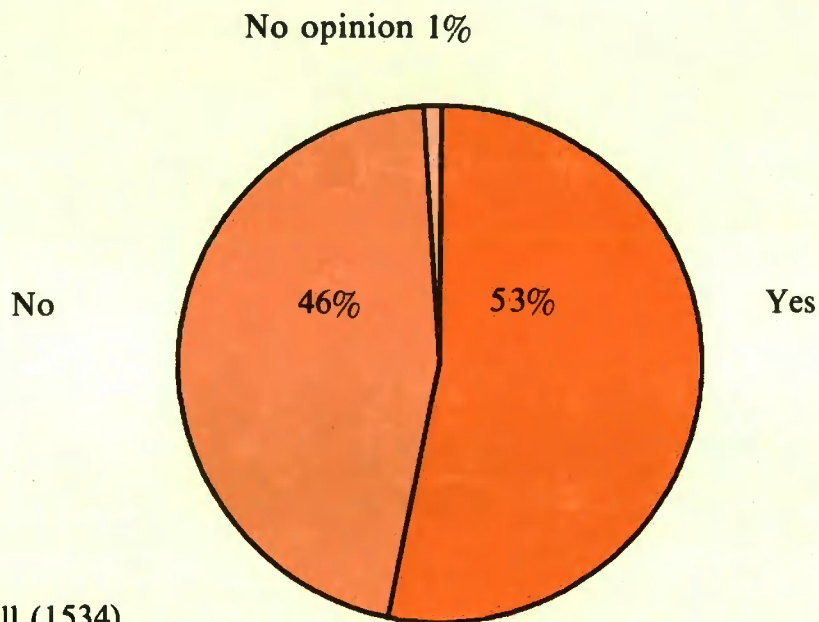
One half (53%) of Britain's drivers sometimes make a conscious effort to avoid using motorways. The elderly are most likely to avoid using a motorway (69%), while only a third (32%) of 17 - 24 year olds do.

Drivers feel that motorways are too congested, likely to have road works or traffic jams (62%), others mention the danger of drivers following too closely (21%) while some admit to feeling that they or their vehicles are not up to the rigours of motorway driving (16%).

High milers and company car drivers are most concerned about congestion, while elderly people are worried about their ability to drive at motorway speeds. On the other hand, it is the young who are likely to avoid a motorway because their vehicle is not suitable.

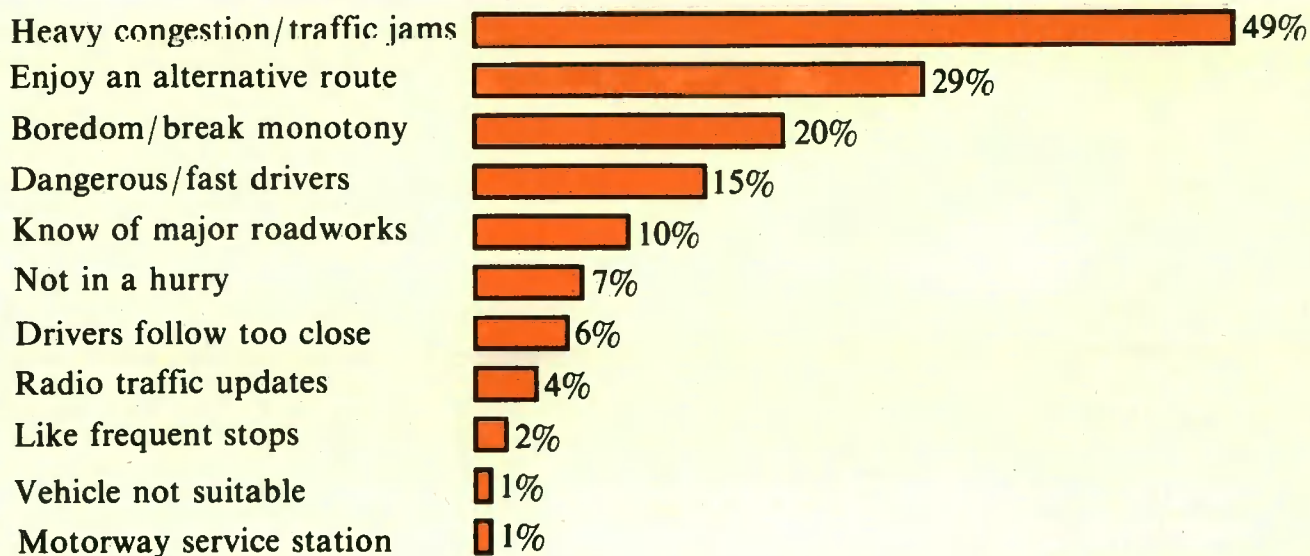
MOTORWAY DRIVING

Q. Do you ever make a conscious decision to avoid a motorway and choose an alternative route?



Base: All (1534)

Q. Why do you avoid motorways?



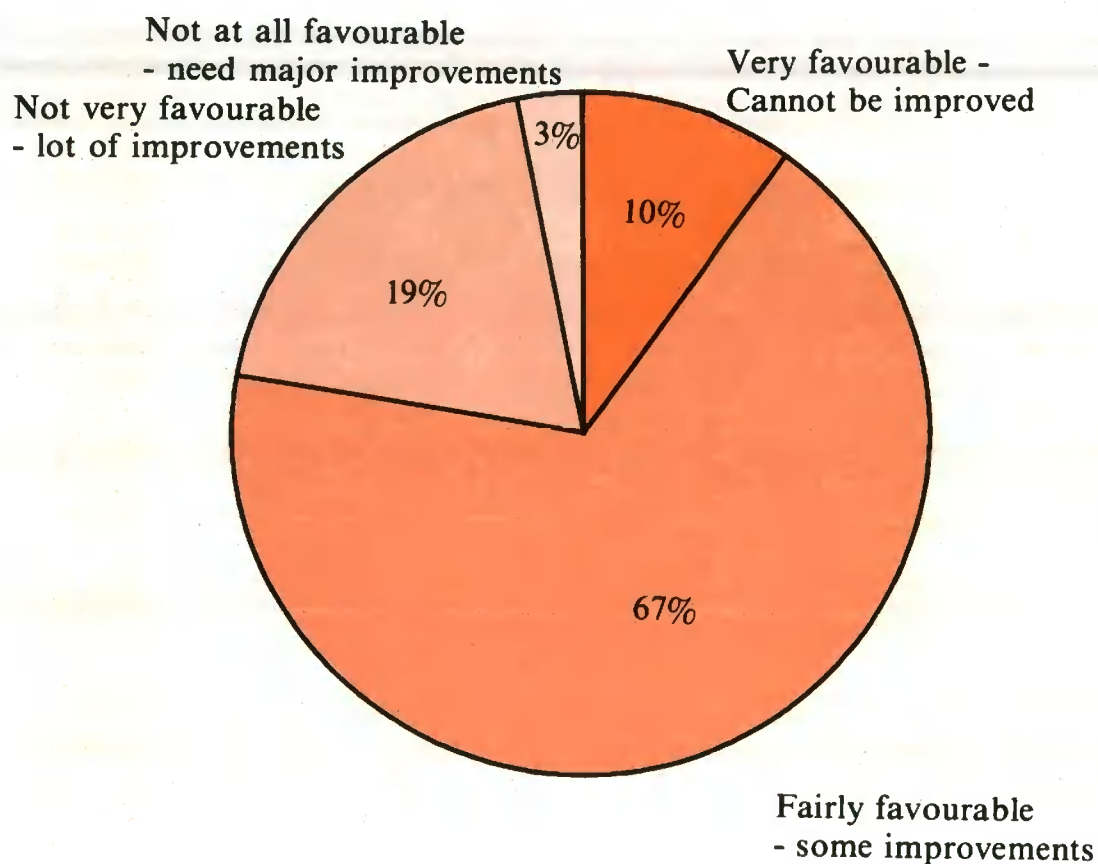
Base: All who avoid motorways (777)

Lex Report On Motoring 1990

Road signs

Britain's drivers are generally satisfied with the country's road signs. Two thirds feel the road signs are good, but some improvement could be made, while one in five (19%) feel a lot of improvements could be made. Those living in London are most critical of road signs (31%).

Q. What are your views on Britain's road signs?



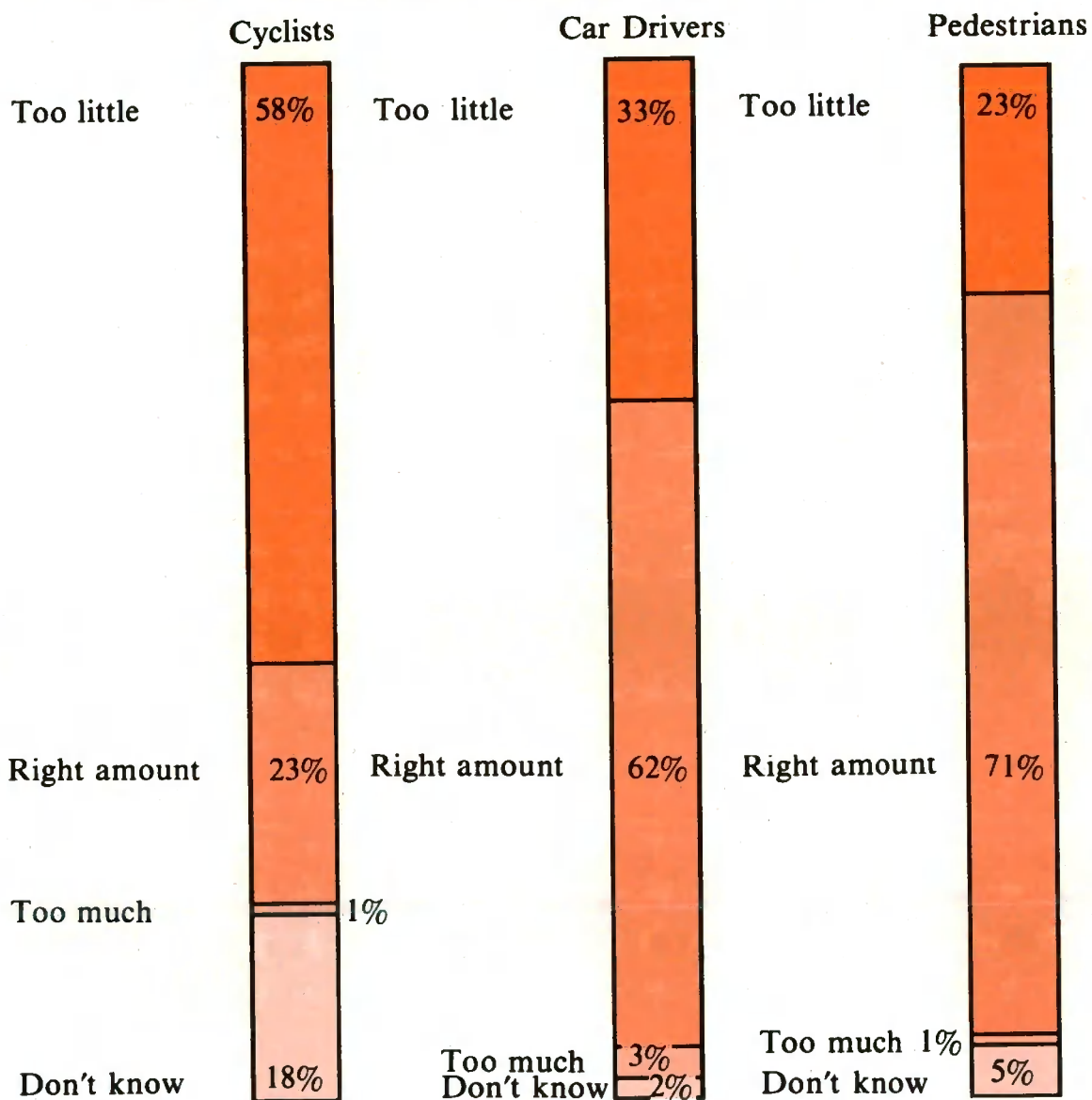
Base: All drivers (1534)

Lex Report On Motoring 1990

Provisions for cyclists and pedestrians

Drivers were asked about the provisions for cyclists and pedestrians in the place where they usually go shopping. Three in five (58%) of Britain's drivers are likely to feel that too little is done for cyclists, compared with 33% for car drivers and 22% for pedestrians.

Q. Thinking of the place where you would usually go shopping, do you think too much, too little or the right amount of provision is made for the following?



Base: All drivers

Lex Report On Motoring 1990

BUYING A CAR

Buying a car

Reasons for changing the car

Place of purchase

Reasons for buying a particular car by age

Dealers - visits and test drives

Trust of mileage figures

Satisfaction with sales experience

Information sources

Influences on choosing the model of car

Reliability versus durability

Financing the car

Treatment of women customers

Lex Report On Motoring 1990

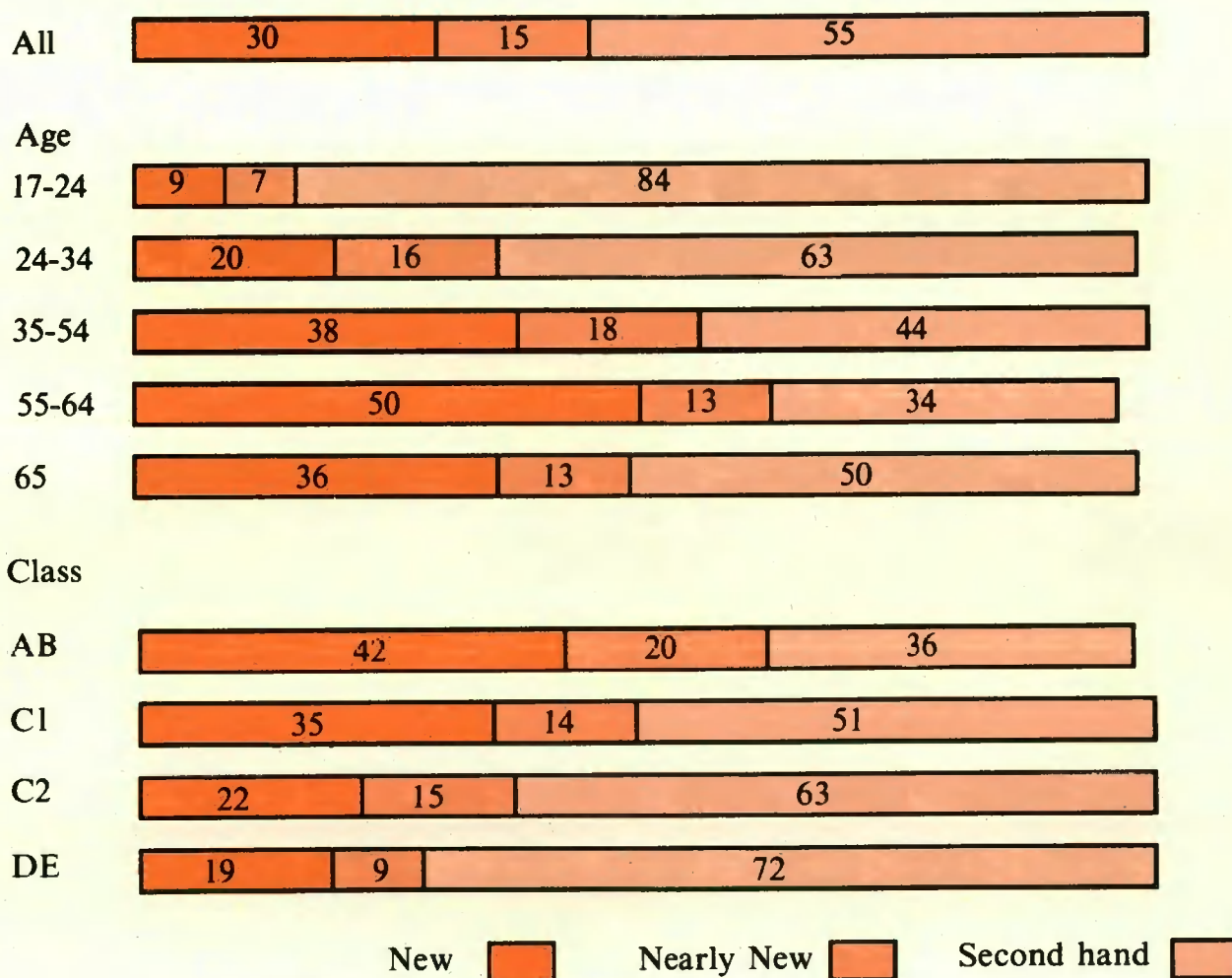
Lex Report On Motoring 1990

BUYING A CAR

Buying a car

Over two in five (44%) British drivers have been responsible for buying a car within the last two years, three in ten (30%) buying a new car, 15% buying a car less than a year old and 55% buying a second hand car.

Q. Was this car bought new, nearly new or second hand?



Base: Bought car in the last two years (693)

Lex Report On Motoring 1990

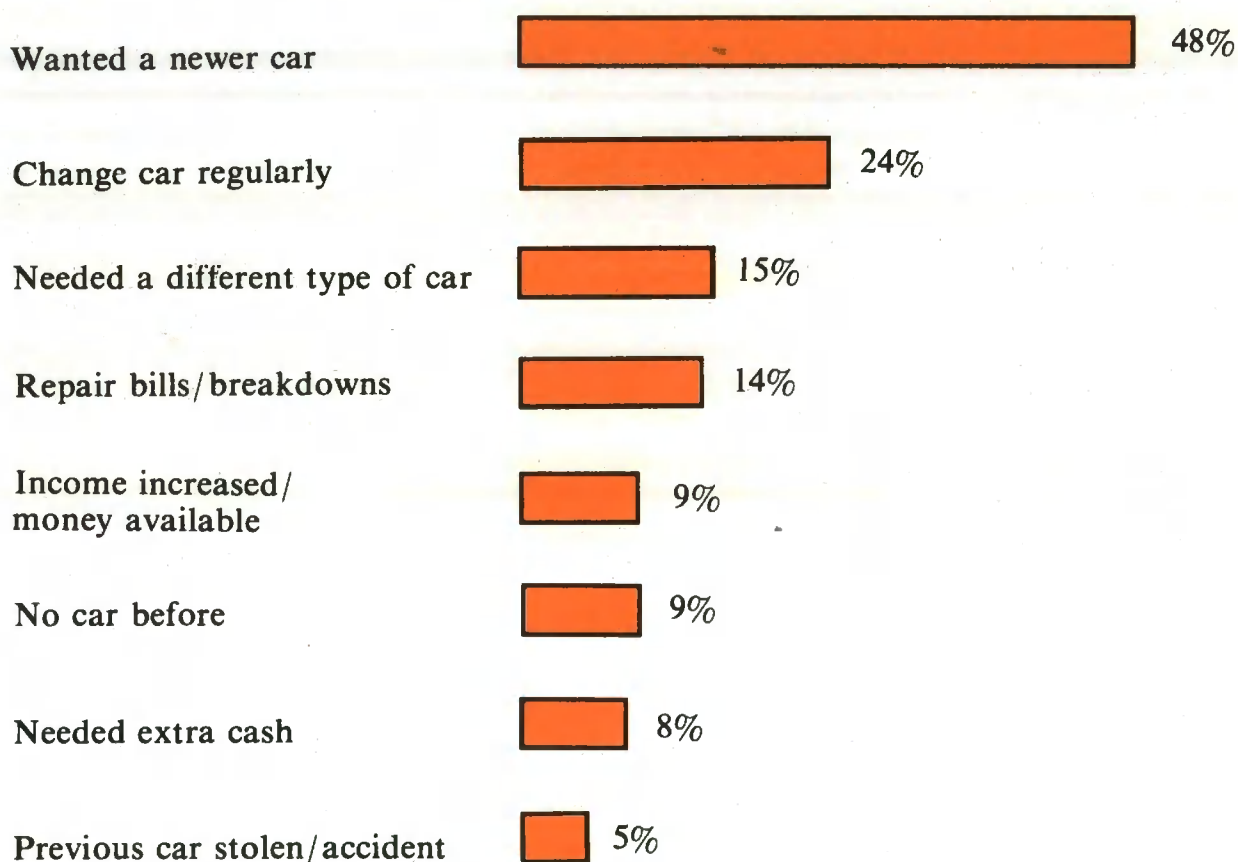
Reasons for buying the car

Over one half gave reasons for buying a car which is linked to the age of the car, such as "wanted newer car" (48%) or "rising repair bills" (14%).

Buyers of new cars are more likely to change their cars regularly (41%), while nearly new car buyers want a newer car (see also page 84). One in eight (12%) of second hand cars buyers did not have a car before, compared with 6% of new car buyers.

The number of new car buyers who wanted an additional car, together with those who did not have a car before, accounts for the increment in the car population of nearly half a million cars a year. About 20% of new car sales are incremental each year. Approximately 0.9 million used cars out of total sales of 5.2 million (18%) go to those who wanted an extra car or did not have one before.

Q. Which, if any, of these reasons explain why you decided to buy the car?



Base: Bought a car in the last 2 years (693)

Lex Report On Motoring 1990

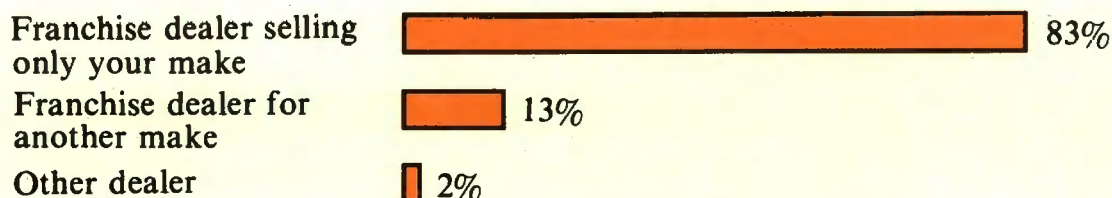
Place of purchase

Four in five new cars (83%) are bought from a franchise dealer specialising in the make bought, the rest from another franchise garage. Forty per cent of nearly new cars are bought through a franchise dealer, whilst the figure for used cars is only 17%, the majority being bought privately or through a friend or relative. These proportions are very similar to last year's.

SOURCE OF PURCHASE

NEW CARS

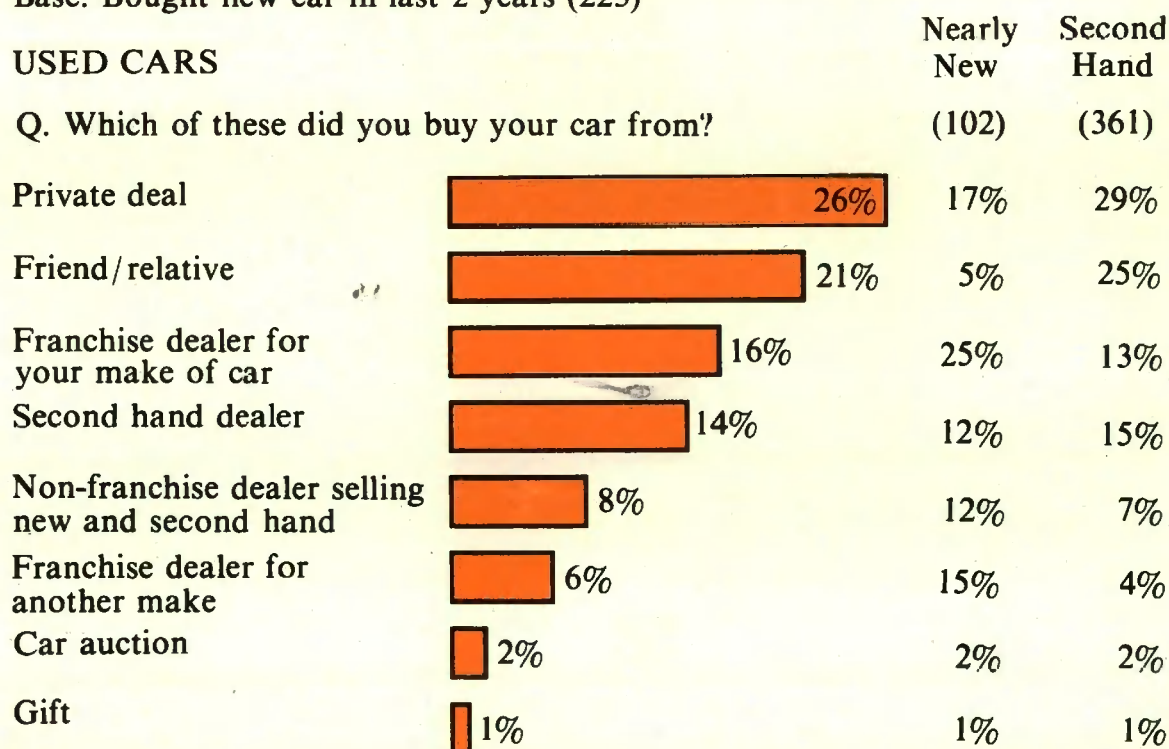
Q. Which of these did you buy your car from?



Base: Bought new car in last 2 years (223)

USED CARS

Q. Which of these did you buy your car from?



Lex Report On Motoring 1990

Reasons for buying a particular car

Reasons for buying a new car

Three in five (59%) of those who bought a new car rather than a second hand car did so for reliability. Closely linked to this are the one in five who wanted a guarantee. The middle classes are less likely to emphasise the ability to afford a new car than DE's (13% compared with 34%). DE's are also more concerned with reliability.

Reasons for buying a nearly new car

The most frequently stated reason for buying a nearly new car rather than a new car is the inability to afford a new one (37%) but a third (34%) feel that it is better value for money. Generally, the reasons are more likely to be positive towards nearly new cars, rather than simply stating that they are the best substitute for a new car.

Reasons for buying a second hand car

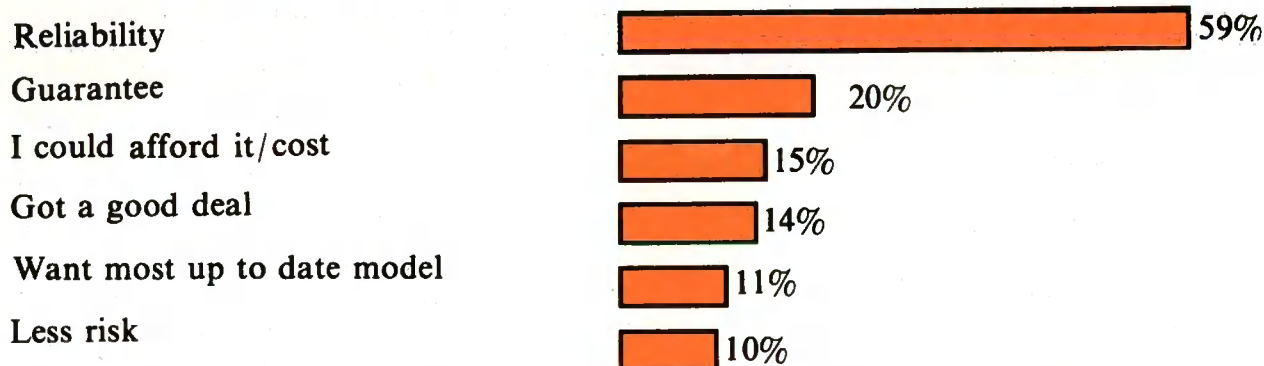
While nearly new cars tend to be bought because of perceived advantages over new cars, almost one half (47%) of second hand car buyers say they could not afford a new car and a further quarter say they could afford a second hand car, implying that they could not afford a newer car.

Lex Report On Motoring 1990

REASONS FOR BUYING A PARTICULAR CAR

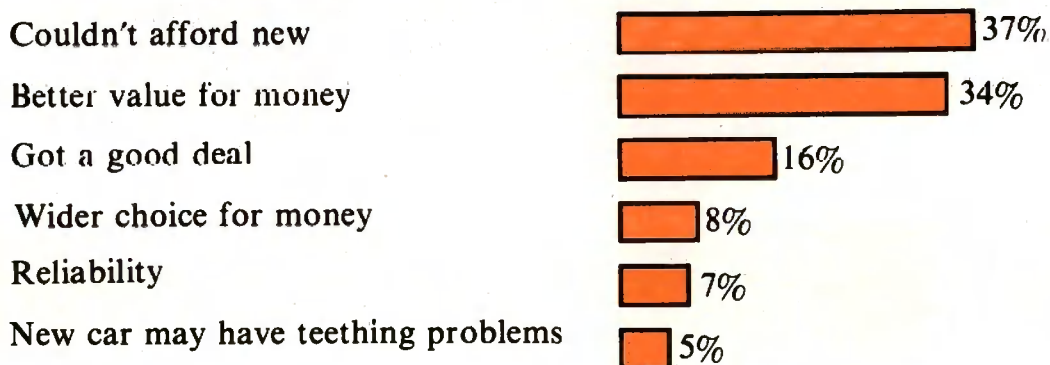
Q. What are the two or three main reasons for buying

A NEW CAR RATHER THAN A SECOND HAND CAR



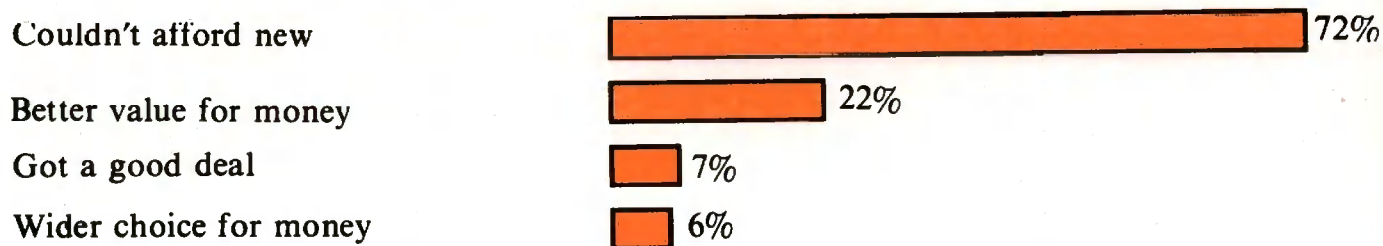
Base: All those who have bought a new car within the last 2 years (223)

A NEARLY NEW RATHER THAN A NEW CAR



Base: All those who have bought a nearly new car within the last 2 years (102)

A SECOND HAND CAR RATHER THAN A NEW CAR



Base: All those who have bought a second hand car within the last 2 years (361)

Lex Report On Motoring 1990

Dealers - visits and test drives

Visits prior to decision

Those who bought their car from a dealer or a garage visited an average of 2.2 dealers before deciding where to buy their car. Sixteen per cent did not visit any dealers, whilst one half (51%) visit at least two dealers. Second hand car buyers are more likely to shop around, looking for a specific car, visiting an average of 2.6 dealers, compared with 1.9 for new car buyers.

Company car buyers are more likely to visit a number of dealers, with 59% visiting at least two.

Test drives

Of those who visited a dealer, over a third (36%) did not have a test drive at any of them. On average, one test drive was taken, with second hand buyers more likely to take test drives, in line with the higher likelihood of visiting more dealers.

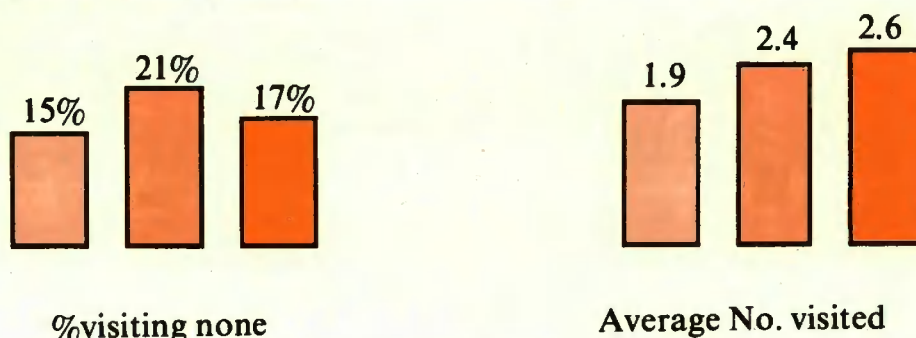
Trust of mileage figures

Despite the widely accepted view that cars are "clocked" and odometer readings are unreliable, most (85%) used car buyers feel that readings are correct, with only 7% not trusting the odometer and 8% not knowing. However, that 7% translates into a third of a million purchases a year, where the customer does not believe the mileage was correct. Although the sample is very small, purchasers are most suspicious of auctions.

Lex Report On Motoring 1990

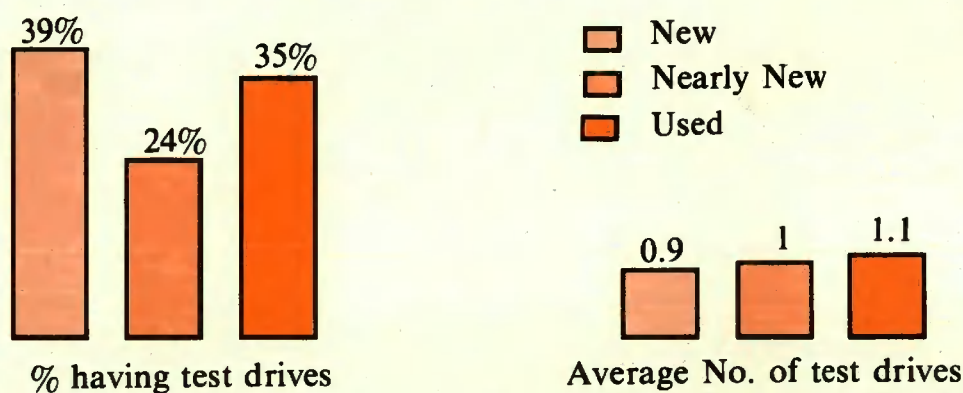
DEALERS VISITED

Q. When you bought your car, how many dealers, if any, did you visit before deciding where to buy the car?



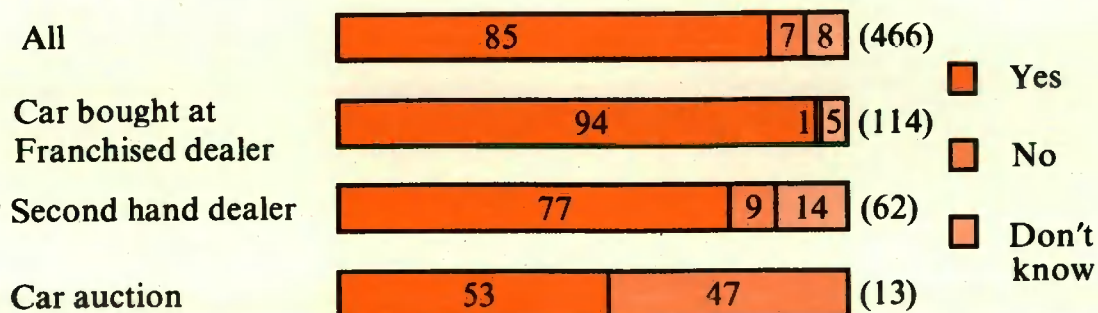
Base: All who have bought a car from a dealer within the last 2 years (447)

Q. And at how many of these, if any, did you have a test drive?



Base: All who have bought a car from a dealer within the last 2 years (447)

Q. Do you think the mileage which was shown on the mileometer was the true mileage that had been done on the car?



Base: All those who have bought a nearly new or secondhand car within the last 2 years (466)

LEX
SERVICE

Source: Lex Report On Motoring 1990/MORI

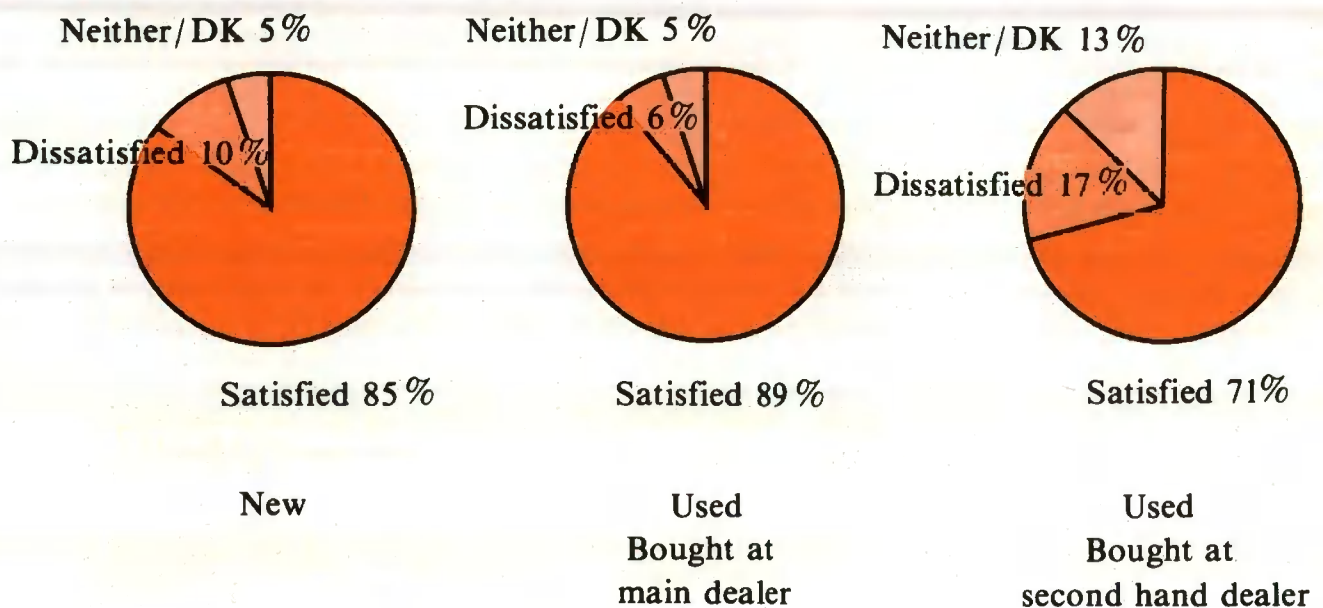
Lex Report On Motoring 1990

Satisfaction with sales experience

Most (84%) drivers who bought a car from a dealer or a garage were satisfied with the service they received from the sales department, although one in ten were at least fairly dissatisfied. Second hand car dealers receive the highest dissatisfaction rating (17%) with 8% very dissatisfied

The main reasons for dissatisfaction were failure to do the things that were promised (49%) and a failure to sort out problems (45%). A third stated that the car was unreliable.

Q. How satisfied were you with the sales service when you last bought a car?



Reasons for dissatisfaction with sales service when buying car

	Total (44) %
Not doing all the things that were promised	49
Response to dealer fixing problems	45
Car unreliable/things wrong with it	32
Time devoted to you as a prospective customer	22
Ability of staff to listen and understand your requirements	17
Staff's lack of knowledge of the model range	13
Honesty/trustworthiness of staff	13
Care and attention when handing over your car	10
Reception of sales staff when visiting showroom	9

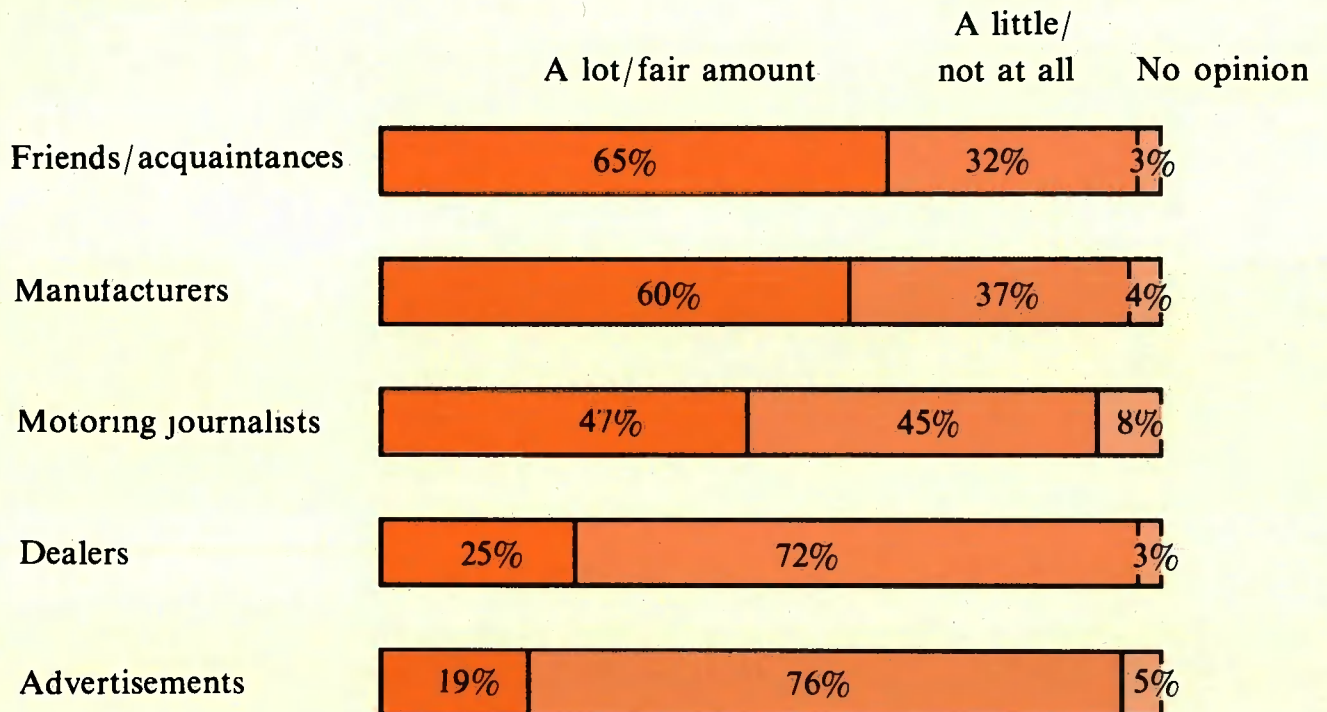
Base: All dissatisfied with sales service

Lex Report On Motoring 1990

Information sources

When choosing a car, the most trusted source are friends and acquaintances - 65% trust their claims. Manufacturers are the next most valuable (60%), then motoring journalists (47%), dealers (25%), while car advertising is only trusted by 19% of Britain's drivers.

Q. How much do you trust the claims made by the following when choosing a car?



Base: All (1534)

Lex Report On Motoring 1990

Influences on choosing the model of car

What the salesman said about the car

Two in five (38%) of those who bought from a dealer or garage rate what the salesman said about the car as at least fairly important, although only 1% said it was crucial. On the other hand, a quarter (27%) say it was not at all important. Women are more likely to value the salesman's advice (43% against 35%), whilst those living in London are likely to be most sceptical of salesman, with 76% saying that it was not important.

Attractive deal

The majority (72%) feel that an attractive deal offered on a particular model is at least fairly important in the decision making process. Drivers of large cars (over 2000cc) are least likely to be concerned about an attractive deal.

Test drive

A test drive is felt to be important by three out of five drivers (61%) although only 12% think it is crucial. One third (33%) do not think it influences their choice of model. Second hand car buyers are more likely to think a test drive is important - 73% against 50% of new car buyers. The young are more likely to value a test drive, while over half of those living in London do not feel that a test drive is important.

Reading the relevant literature on the car

A majority (55%) attach some importance to reading the relevant literature on the car, 6% think it is crucial. Literature is more important to new car buyers (60%) than used car buyers (50%). Younger drivers also feel literature helps them chose a model (79%).

Examining the car at close quarters

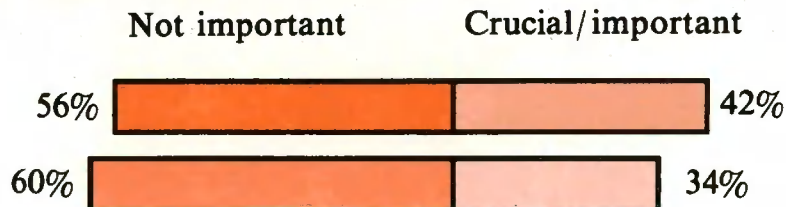
Most car buyers (84%) think that a close examination of the car is important, three in ten say it is crucial. Nearly all (91%) of second hand car buyers say that it is important, - 87% say it is very important or crucial.

Lex Report On Motoring 1990

INFLUENCES ON THE DECISION—MAKING PROCESS

Q. How important were each of the following in helping you to decide on the model you bought?

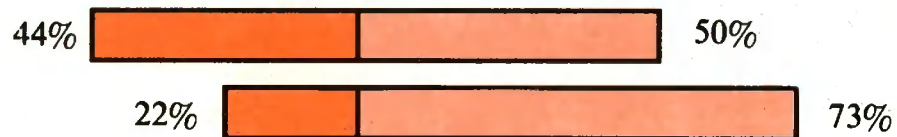
What the salesman told you about the car



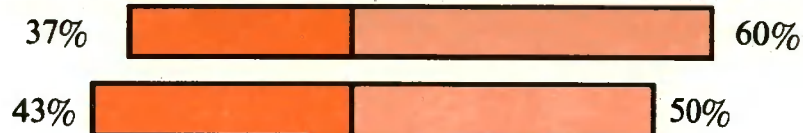
An attractive deal offered to you on the particular model



A test drive



Reading the relevant literature on the car



Examining the car at close quarters



 New  Nearly new/secondhand

Base: All who have bought a new car or bought a car from a dealer/garage within the past 2 years

Lex Report On Motoring 1990

Reliability versus durability

Drivers are almost evenly divided as to whether they buy a car for short-term reliability (51%) or long term durability (46%). As a rule, those who are likely to keep their car for less than an average period of time are more likely to consider short term reliability, AB's (59%), company car drivers (75%) and high milers (65%). The elderly, on the other hand, who are likely to keep their car for over 6 years, look, not surprisingly, for long term durability.

Financing the car

Almost three in five (57%) bought their car outright for cash, although less than half (45%) of those who bought a new car did this. Cars provided by an employer are least likely to be bought for cash (27%), although one in five of these company car drivers do not know how the car was bought.

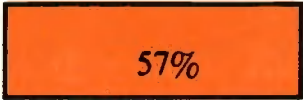







The second most popular way of buying a car is via a bank loan, particularly in Scotland (22%) and by used car buyers. The elderly are least likely to use this method (3%). One in ten (9%) use a loan from a finance company, a method popular for new car buyers (14%) and in Scotland (12%).

Finance leasing and contract hire are the most popular methods of purchase for company car drivers (15% and 17%) respectively.

Lex Report On Motoring 1990

FINANCING OF THE CAR

Q. How was the car you drive most frequently bought?

		New %	Nearly New %	Second hand %	Private %	Provided by Employer %	Business expense %
Cash	 57%	45	57	65	61	27	34
Bank loan/ cash	 16%	10	19	20	18	2	21
Finance Co/ cash	 9%	14	10	6	10	3	13
Hire purchase/ cash	 5%	7	2	4	5	2	9
Finance leasing	 3%	7	2	*	1	17	9
Contract hire	 3%	7	2	*	1	22	5
Other	 4%	4	1	2	2	9	*
Don't know	 4%	6	2	2	2	19	9

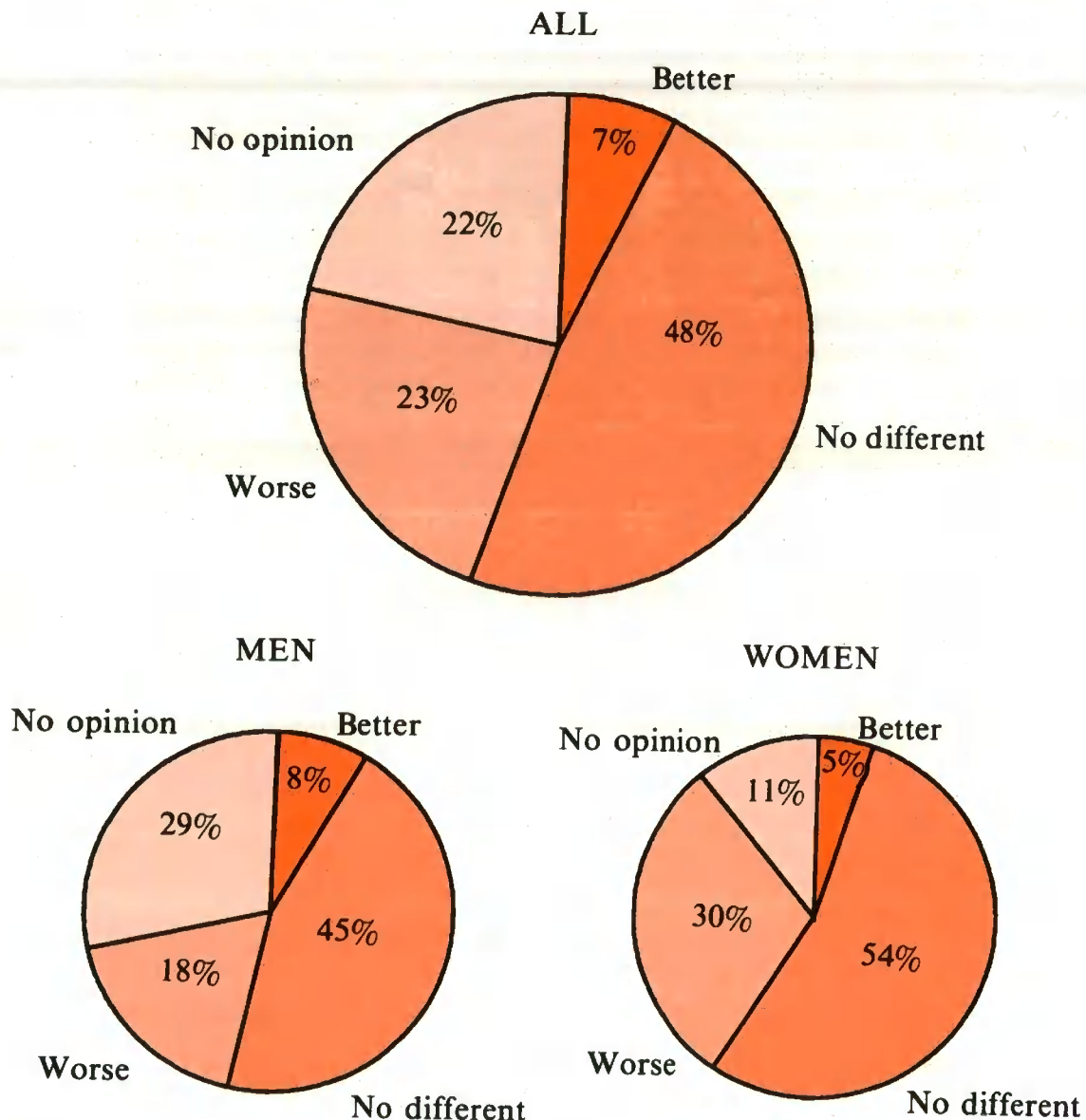
Base: All drivers (1534)

Lex Report On Motoring 1990

Treatment of women customers

Car buyers think that dealers treat women worse than men, although one half (48%) say there is no discrimination either way. Women are more likely to think that they are treated worse than men (30% against 18%), although 54% of women say there is no difference.

Q. Generally speaking do you think car dealerships treat women customers better than male customers, worse than male customers or no different?



Base: All bought car from dealer in last 2 years (447)

SERVICING A CAR

Servicing the car

Reasons for choice of location

Satisfaction with servicing

Control of servicing

Replacing exhausts and windscreens

SERVICING A CAR

Servicing the car

Three quarters (74%) of those surveyed had primary responsibility for getting their car serviced - nine in ten (91%) men and one half (52%) of women.

Over a third (35%) have their car serviced by a main dealer for their make of car, while 29% go to a garage or workshop not selling new cars. New car drivers are most likely to go to a main dealer (76% compared with 22% for used car drivers). Women are more likely to use a main dealer (41% against 33%) or a garage or workshop (30% against 28%) than men. Men, however, are much more likely to do their own servicing (18% against 5% of women), although this figure includes the car being serviced by someone else in the household. Nearly a quarter (23%) of second hand drivers do their own servicing.

Compared with last year, there has been a slight increase in the proportions using a franchised garage, and to a lesser extent, non-franchised workshops, at the expense of do-it-yourself.

Of those who have their car serviced by a main dealer, one half (49%) always use the dealer they purchased the car from, and a quarter (26%) use another franchised dealer. Company car drivers, while generally loyal to the franchise dealer, are more likely to use a different dealership from the original purchase location.

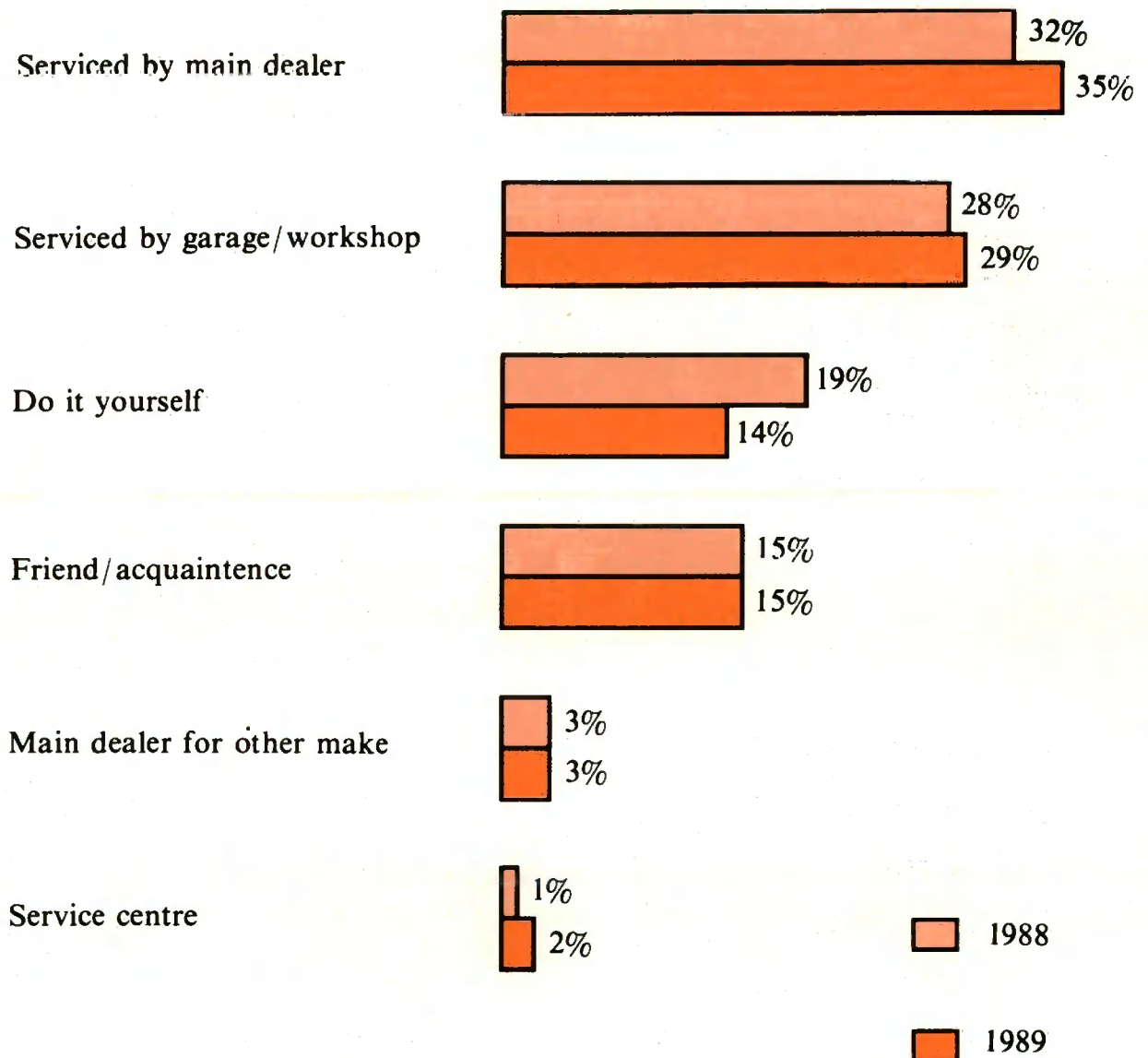
Choice of servicing location

	<u>Men</u> %	<u>Women</u> %	<u>New</u> %	<u>Second hand</u> %
Main dealer for make of car	33	41	76	22
Garage/workshop	28	30	12	31
Do it yourself	18	5	2	23
Friend/acquaintance	14	18	4	18
Main dealer for other make	3	3	4	3
Service centre	2	2	1	2
Other	2	*	1	1

Lex Report On Motoring 1990

SERVICING

Q. Which of these do you do?



Base: All with responsibility for servicing (1161)

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Reasons for choice of location

Overall, one in five (22%) choose their location because of the helpful/good service and 18% choose somewhere based on previous experience of their work, suggesting that once a good dealer or garage is found, the driver will continue to use them.

Over one half of those who have their car serviced by a main dealer for their make of car use them because it was the original place of purchase and/or the car is under warranty. Garages or workshops are most likely to be chosen because of previous experience with their work (27%) or due to helpful and good service (38%). These factors are also associated with main dealers but not to the same degree.

When asked to select the most important factor when choosing somewhere to service their car from a list of factors, over one half (53%) say they need to be able to trust their work. Seventeen per cent want a dealer which is close to home, while 14% want to use the original vendor. Company drivers tend to be less concerned about quality of work (37%) and more concerned about closeness to the place where they work (21% against 4%).

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CHOICE OF SERVICE LOCATION

Q. Why do you choose your service location

	Serviced by	Main dealer	Garage Workshop
		%	%
Helpful good service	22%	15	38
Previous experience	18%	14	27
Original vendor	13%	33	20
Convenient location	13%	13	2
General convenience	11%	6	12
Car under warranty	9%	21	
Franchise dealer	6%	15	2

Base: All those who have primary responsibility for getting their car serviced (1152)

Q. What is the most important factor when choosing somewhere to service your car?

		Main dealer	Garage Workshop
		%	%
Trust their work/quality of work	53%	37	66
Close to where I live	17%	16	21
Where the car was bought	14%	28	3
Low cost	10%	3	12
Close to where I work	7%	9	5
Able to do warranty work	5%	10	2
Quick	5%	3	7
Able to provide courtesy car	4%	6	2

Base: All except DIY (1005)

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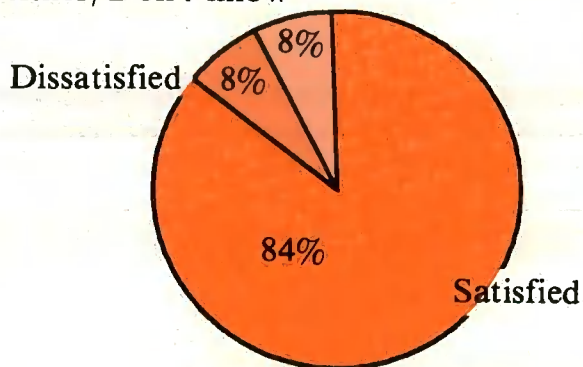
Satisfaction with servicing

Nearly nine in ten drivers (87%) are satisfied with the way their car is serviced, with high milers (80%) and company car drivers being harder to please (82%). Those who use a garage or workshop appear most likely to be satisfied (92%) against the 84% who are satisfied with a main dealer for their make of car. Whilst these figures are not totally comparable with last year, there seems to be a slight improvement in the satisfaction with main dealers compared with last year.

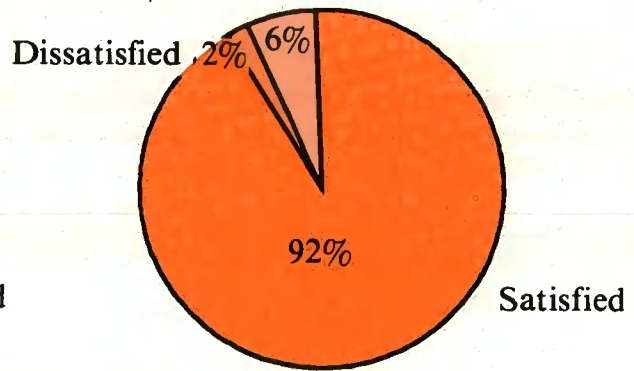
Of the 4% dissatisfied with the way their car is serviced, the main reasons are the quality of work (44%), the costs (36%) and not all the work is done (26%).

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

Neither/Don't know



Neither/Don't know



SERVICED BY MAIN DEALER

SERVICED BY GARAGE
WORKSHOP

Base: All who have primary responsibility for getting their car serviced (1161)

Q. What are the reasons for your dissatisfaction?

	Total (51) %
Quality of work	44
Too expensive	36
Repairs not done	26
Availability of parts	11
Waiting time for appointments	5
Price of parts	5
Bill always larger than quote	4

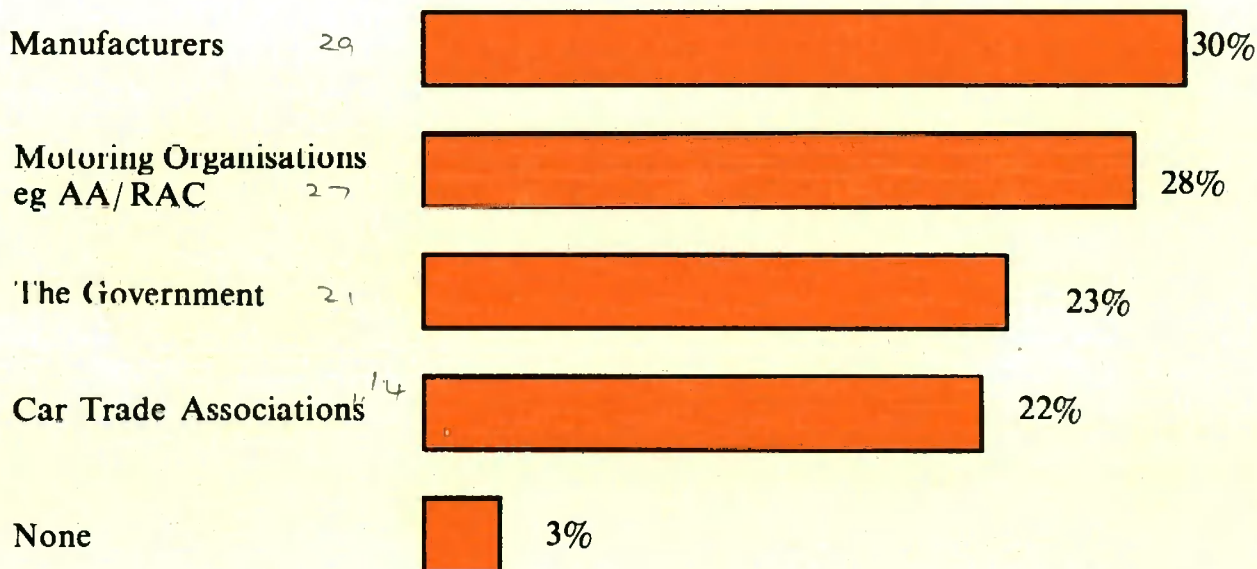
Base: All who are dissatisfied with the servicing of their car.

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Control of servicing

Almost everyone agrees that servicing standards should be set and maintained by either the manufacturer, motoring organisations, government, or car trade associations. All four groups were rated similarly, with a preference for manufacturers, through their dealers.

Q. Which of these should set the standards to which garages and other servicing outlets should service their cars?



Dr. 13

Base: All (1534)

Lex Report On Motoring 1990

Replacing exhausts and windscreens

Replacing exhaust systems

Over half (55%) of Britain's drivers would use a specialist fitter when replacing an exhaust system, with one in six (16%) using a main dealer and 12% a garage or workshop. Fourteen per cent either do it themselves or get a friend to do it. These figures are unchanged from last year. Company car drivers and those who buy new cars are more likely to use a main dealer (30% and 32% respectively), compared with second hand car owners (7%).

Quick service (38%) and low costs (30%) are the most often quoted reasons. Users of specialist fitters are most influenced by their speed and the fact that they are specialists.

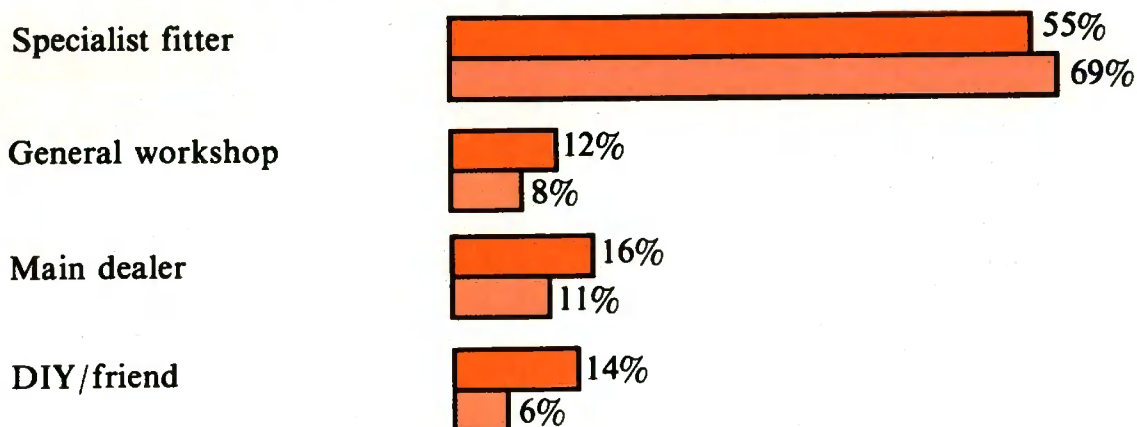
Replacing windscreens

An even greater proportion of drivers say that they would use a specialist fitter to replace their windscreen (69%). One in ten (11%) would use a main dealer and 8% a garage/workshop.

Quick service and the fact that they are a specialist company are again the main reasons. However, a large number of those using a main dealer do so because they are a specialist for the make of car (36%), it gives them peace of mind (22%) or they would not trust anyone else (23%).

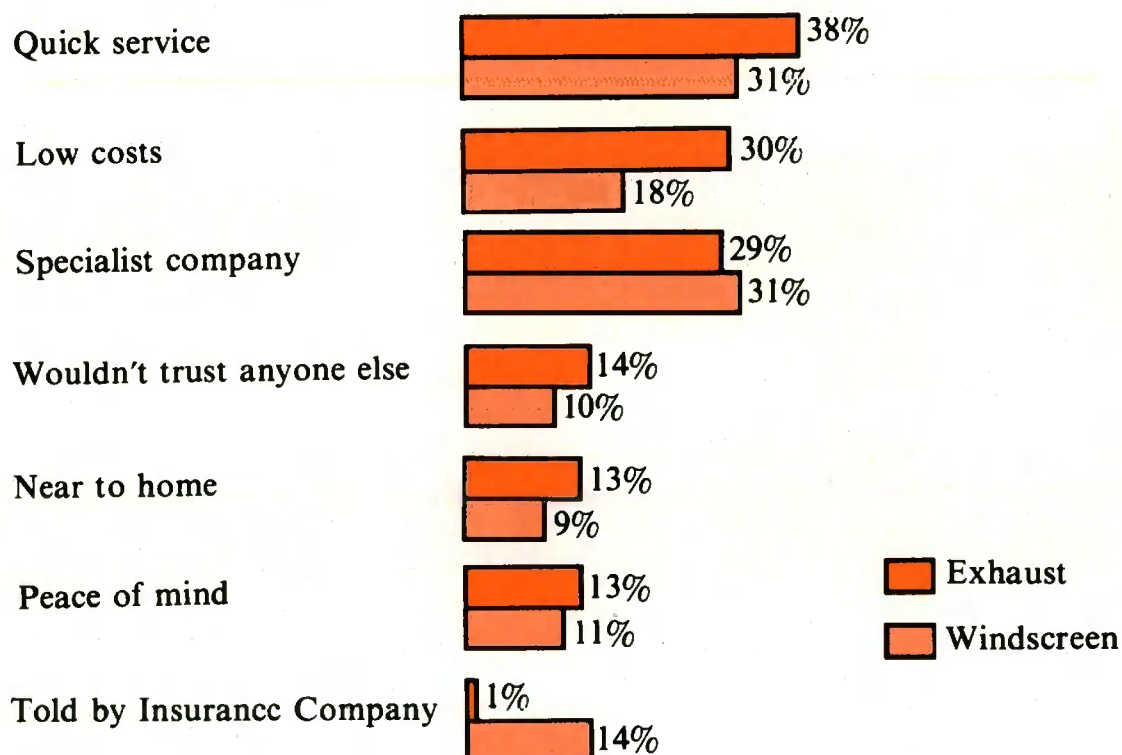
REPLACING EXHAUSTS AND WINDSCREENS

Q. If you were to replace your exhaust system/windscreen where would you be most likely to have this done?



Base: All (1534)

Q. What are the main reasons for choosing this location?



Base: All drivers (1534)

Lex Report On Motoring 1990

THE FUTURE

Expectations for the Year 2001

Use of the Channel tunnel

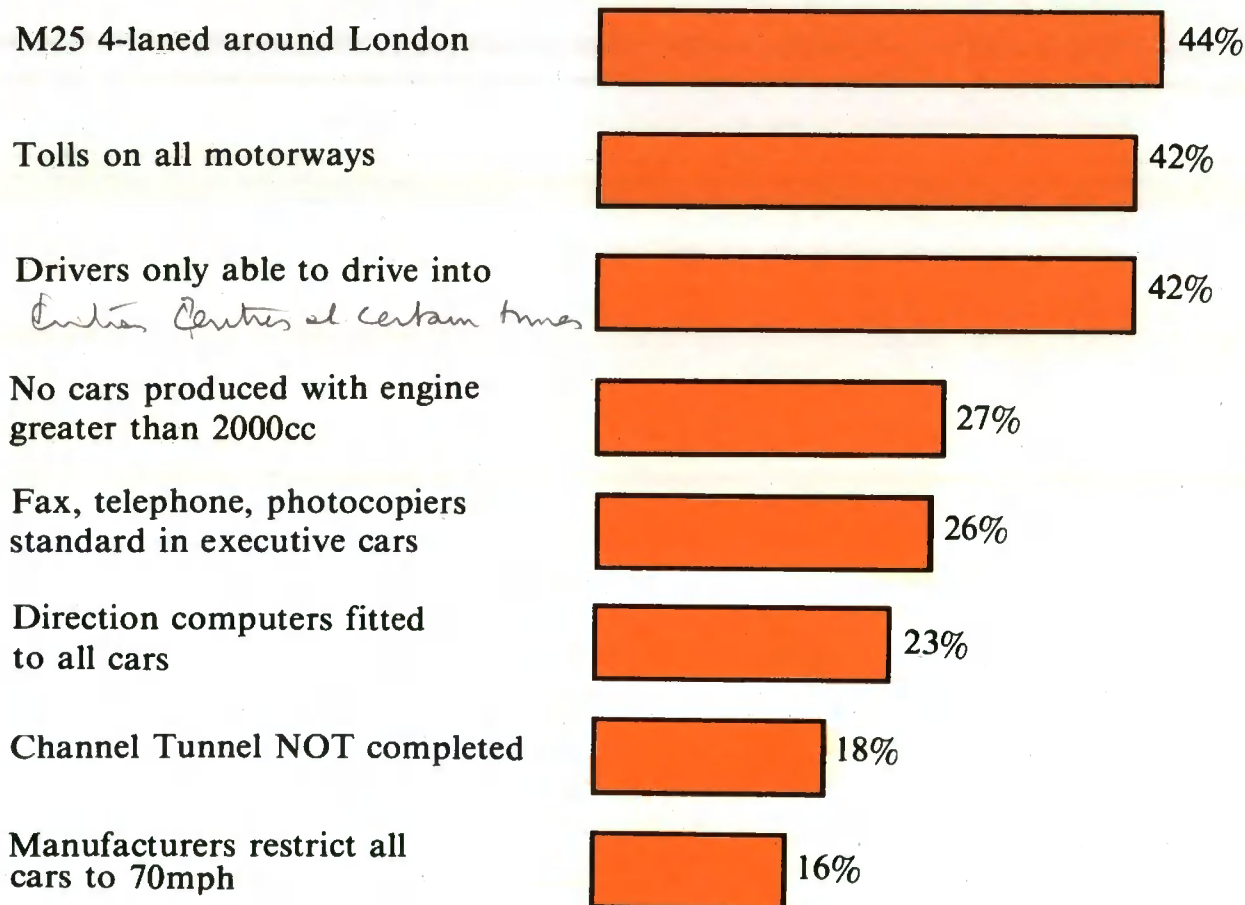
THE FUTURE

Expectations for the Year 2001

Over two in five (44%) expect that by the year 2001 the M25 will have become 4 lanes all the way around London - by implication the majority of drivers are sceptical about this achievement. A similar proportion (42%) expect that drivers will only be allowed to drive into major cities at certain times to reduce congestion and drivers will be required to pay tolls on all motorways (42%). Over a quarter think that engine sizes will be limited to under 2000cc to reduce pollution (27%) and cars will be equipped as mobile offices (26%), particularly if they drive a company car. Only 16% think cars will be restricted to a top speed of 70 mph.

One in five (18%) do not think the Channel Tunnel will be completed by the year 2001.

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



Base: All (1534)

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Use of the Channel tunnel

One per cent fewer than last year say that they would be certain to use the Channel tunnel if it was open now (5% compared with 6%). Although this is too small statistically to be confident of a real change, it may reflect recent controversies about the costs and completion of the tunnel (see previous page) and the marketing efforts by the competition. The young are more likely to use the Channel tunnel (38% certain or likely to, against 27% in total).

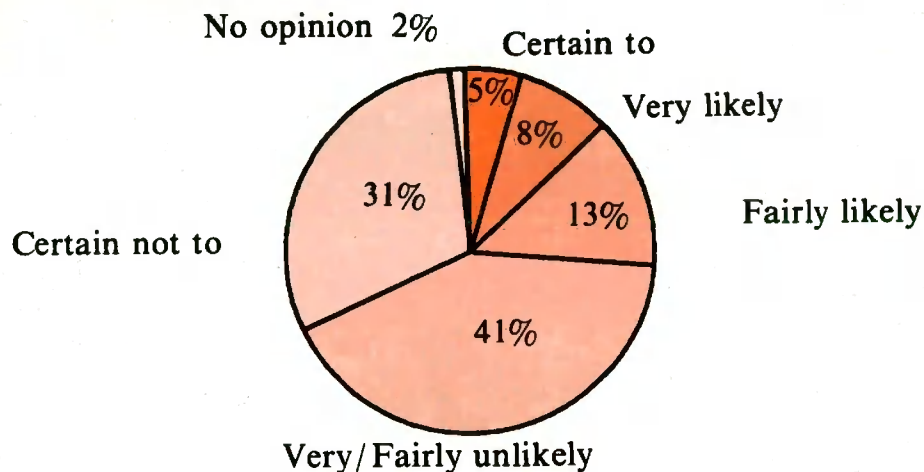
Of the 5% who would be certain to use the Channel tunnel, two thirds (65%) would use it at least twice in a typical year (including 16% who would make at least five return journeys a year). Ferries are the most popular means for crossing the Channel (44%), followed by the tunnel (33%) and hovercraft (16%).

Grossing up, based on those who would certainly use the tunnel, car drivers would make 2.8 million return journeys a year. Assuming an average of 2.5 passengers per car, this amounts to 14 million passengers a year, somewhat lower than Eurotunnel's estimate of 15.8 million shuttle passengers.

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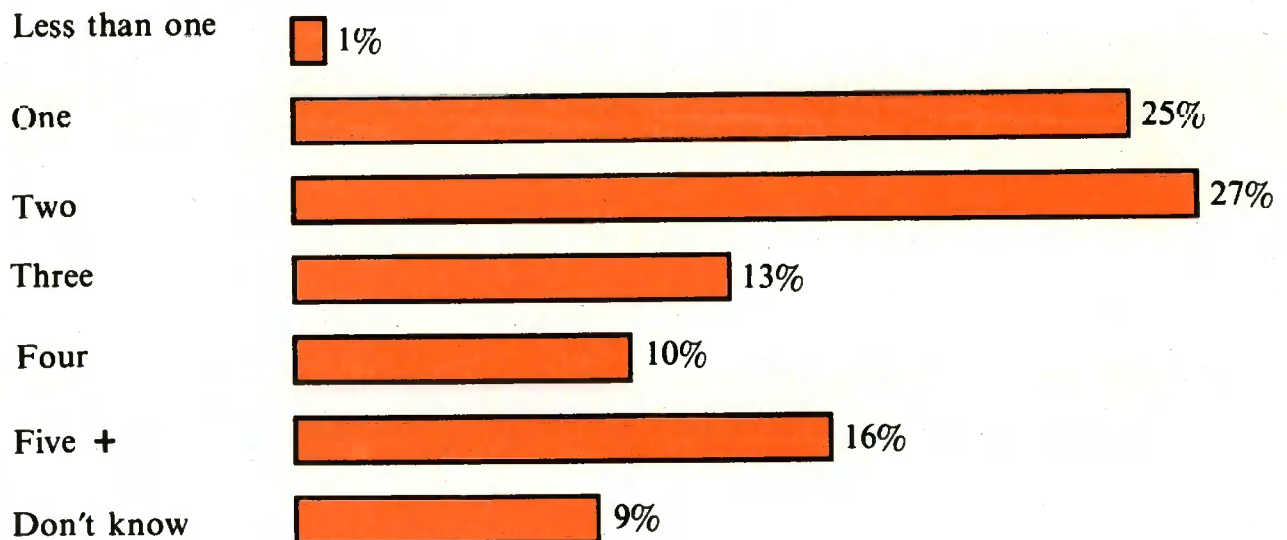
THE CHANNEL TUNNEL

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 (1534)

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



Base: Certain to travel (83)

Average per year 2.61

Total return journeys per year 2.78 million

LEX
SERVICE

Source: Lex Report On Motoring 1990/MORI

Lex Report On Motoring 1990

APPENDIX

Statistical reliability and definitions

SOURCES AND ACKNOWLEDGEMENTS

APPENDIXStatistical 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. In addition, because the original sample included a booster for Scotland and company car drivers the data had to be weighted which reduces the effective sample size to be used for calculating statistical reliability. This is obtained by dividing the actual, unweighted, sample by 1.157. The effective base for the whole sample, for example, then becomes 1326. The following table shows a range of sample sizes, the equivalent effective sample sizes and the margins within which we can be 95% certain that the true figures will be:

Research Findings

<u>Weighted Sample size</u>	<u>Effective Sample size</u>	<u>10% or 90%</u>	<u>20% or 80%</u>	<u>30% or 70%</u>	<u>40% or 60%</u>	<u>50%</u>
1500	1296	±2	±2	±2	±3	±3
1000	864	±2	±3	±3	±3	±3
500	432	±3	±4	±4	±5	±5
200	173	±4	±6	±7	±7	±7
50	43	±9	±12	±14	±15	±15

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

For similar reasons, when comparing findings between two areas of the country, or between two sub-groups (e.g. men vs women), we may not be certain 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

<u>Size of sample being compared</u>	<u>Effective Sample size</u>	<u>10% or 90%</u>	<u>20% or 80%</u>	<u>30% or 70%</u>	<u>40% or 60%</u>	<u>50%</u>
400-400	346-346	±4	±6	±6	±7	±7
400-200	346-173	±5	±7	±8	±8	±9
200-200	173-173	±6	±8	±10	±10	±11
200-100	173-86	±7	±10	±11	±13	±13
100-100	86-86	±9	±12	±14	±15	±15

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When comparing this year's findings with last year's findings, to ensure that differences are genuine we should compare last year's actual sample with this year's effective sample size. The weighting necessary, this year, because of the two boosted sub-samples means that we have to divide the base by 1.157. We can be 95% certain that differences larger than those in the following table are genuine.

Magnitude of Figures being Compared

Size of sample being compared	1988 Effective Sample size	1989 Effective Sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1500-1500	1500	1296	±2	±2	±3	±4	±4
1000-1000	1000	864	±3	±4	±4	±4	±5
500- 500	500	432	±4	±5	±6	±6	±5
200- 200	200	173	±6	±8	±9	±10	±10

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

"Low milers" - all those driving less than 6,000 miles a year

"High milers" - all those driving more than 20,000 miles a year

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

Lex Report On Motoring 1990

SOURCES AND ACKNOWLEDGEMENTS

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Transport Statistics Great Britain 1978 - 1988

Department of Transport, HMSO, London September 1989

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Lex Service PLC, London, February 1989

Lex Vehicle Leasing Report on Company Cars 1989

Lex Vehicle Leasing, Marlow, 1989

**SUMMARY OF THE 1989
LEX REPORT ON MOTORING**

Lex Report On Motoring 1990

Lex Report On Motoring 1990

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 nearly 82,000 cars in the UK in 1989, giving a market share of 3.6%, the largest market for Volvo cars outside the US. Volvo Concessionaires operates through 300 Volvo dealers throughout the country, which, with the exception of the 11 Lex Brooklands dealerships, are all owned and managed independently.

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

Lex's Retail Group trades as

- Lex Brooklands, the largest Volvo dealer group
- Lex Mead, one of the leading Rover groups, also selling Jaguar and Rolls-Royce cars and Land Rover vehicles
- Shaw & Kilburn and Lex SMT, the largest Vauxhall dealer group, which also sell Citroën, Audi Volkswagen and Toyota cars under Lex name
- Gilbert Rice (Ford)
- Dan Perkins - a leading Nissan group
- Campbell in the US, with Audi, Ford, Lincoln Mercury, Mazda, Nissan, Porsche and Volkswagen

Lex Retail Group is investing £20 million a year to improve the facilities and services which it offers its customers and to ensure that the customer service experience is 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 and Taiwan, representing 80 manufacturers of semiconductors, passive components and computer products. Total sales exceed £500 million a year.

Enquiries: David Leibling, Lex Service PLC, 01 723 1212 January 1990
(071 723 1212 from May 1990)