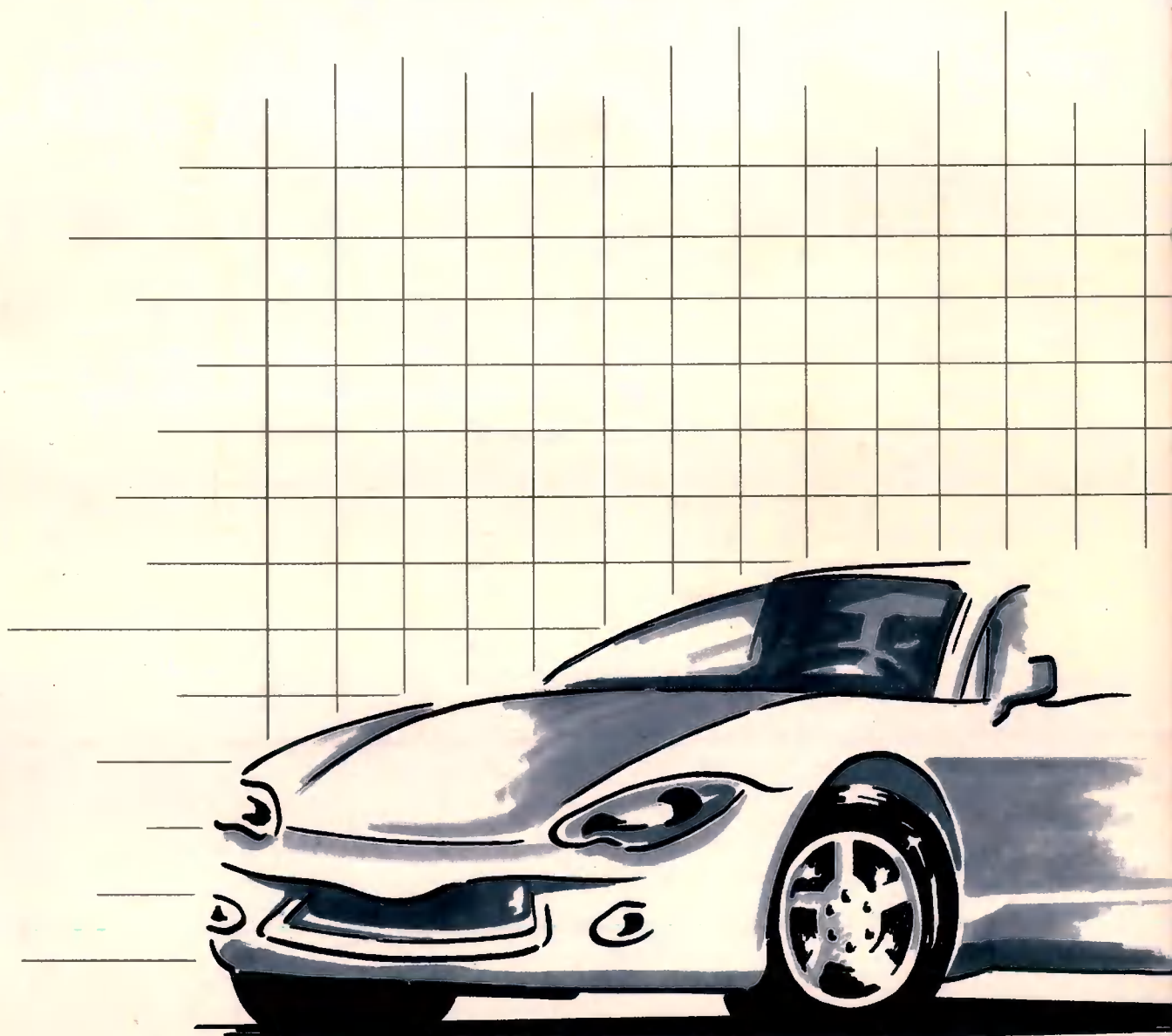


1994

Lex Report on Motoring— *The Consumer View*



LEX

SERVICE



1994 LEX REPORT ON MOTORING – The Consumer View

LEX SERVICE PLC

Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange. Annual sales exceed £1 billion, placing it in the top 150 UK quoted companies, ranked by sales.

Lex Service is the leading retailer of passenger cars, vans and trucks in the UK, with over 130 outlets representing 30 franchises. In addition, Lex has a joint venture car retailing operation in the US.

Lex Retail Group represents the following car lines: Citroen, Ford, Honda, Hyundai, Isuzu, Jaguar, Jeep, Land Rover and Range Rover, Mazda, Mercedes-Benz, Mitsubishi Nissan, Peugeot, Renault, Rolls-Royce and Bentley, Rover, Saab, SEAT, Subaru, Toyota, Vauxhall, Volkswagen Audi and Volvo.

Campbell in the US has the Ford, Mazda, Nissan and Saturn franchises.

Our goal is that the Lex name, which is applied to dealerships throughout the group, stands for a level of customer service experience that will be clearly the best in the motor industry.

Lex Service's commercial vehicle businesses represent Foden, Leyland DAF, ERF, Iveco Ford, MAN, Mercedes-Benz and Renault 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 55,000 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. **Seltra** offers contract hire of trucks in France. **Lex Systems Leasing** leases personal computers.

Lex has a controlling interest in Hyundai Car (UK) which imports, distributes and markets Hyundai cars in the UK through 170 dealers, four of which are owned by Lex.

Enquiries: David Leibling, Lex Service PLC, 071-723 1212

January 1994.



1994 LEX REPORT ON MOTORING – The Consumer View

**1994
Lex Report
On Motoring
'The Consumer View'**





1994 LEX REPORT ON MOTORING – The Consumer View

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‘The Consumer View’

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FOREWORD BY THE SECRETARY OF STATE FOR TRANSPORT

I am delighted to welcome the sixth Lex Report on Motoring, which continues to provide a valuable picture of motorists' opinion on a wide range of issues.

The forecasts, which form an important part of this year's report, indicate that the car will for many of us continue to be a valued mode of transport for years to come. But it is also clear that concern for the environment continues to grow.

It is essential, therefore, that we continue the process of "civilising" the motor car, of reducing the costs, in the widest terms including environmental and social costs, which car use imposes on us. The report shows that there are many drivers who would like their next car to be more environmentally friendly. Manufacturers and dealers have an important role in encouraging the uptake of features which reduce fuel consumption and exhaust emissions.

But "civilising" the motor car also means making it safer and I am heartened that safety is one of the main concerns of motorists. Today's cars offer many improved safety features, and as the report shows, there is an increasing demand for features going significantly beyond what is required by law. The time when safety did not sell is past and it appears that this view is increasingly shared by motor manufacturers.

The Lex Report on Motoring has played a valuable part in raising awareness of environmental and safety issues. The Lex Group are to be congratulated on this work and I look forward to seeing it continue.

JOHN MACGREGOR



1994 LEX REPORT ON MOTORING – The Consumer View

INTRODUCTION

This is the sixth edition of the Lex Report on Motoring, based again on the results of a survey specially conducted for us by MORI. This year we have asked the Henley Centre for Forecasting to use the results to forecast the shape of Tomorrow's Motoring in a special section at the beginning of this report, which also includes the views of some of tomorrow's drivers – today's teenagers.

We have continued our practice of measuring a wide range of issues related to motoring which are of concern to all of us involved in the manufacture, distribution and retailing of cars as well as policy makers and legislators. These are summarised in the main section of the report and are backed up by statistical tables which reinforce the value of the Lex Report on Motoring as the prime source of data on motorists in the UK.

Clear signs of recovery

Although the Lex Reports on Motoring have consistently shown an increase in the demand for car ownership, three years of recession have resulted in unprecedented falls in registrations of new cars. However, 1993 has seen very positive signs of recovery with car sales increasing steadily throughout the year. This year's research results also echo that increased confidence, with increased car ownership in 1993 and expected car ownership in two years' time returning to a level anticipated at the peak of the boom of 1989. Motorists consistently report their dependence on their car with more drivers finding it very difficult to adjust their lifestyle to being without a car.

The company car remains a key part of the motoring scene in the UK despite the changes in taxation and the effects of the recession. The wide coverage of our research enables us to monitor the behaviour of drivers and buyers of both new and used cars whether they own the car privately or it is financed by a company. We have again used this depth of knowledge to prepare a separate report on company drivers to be published later in the year in conjunction with our jointly owned car leasing company, Lex Vehicle Leasing.



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Future direction

Our research has shown that motorists are demanding increasingly high levels of service from the organisations from whom they buy their cars and who carry out the subsequent servicing and repairs. The recession taught the consumer to demand more from those with whom it bought. It also showed businesses that if they were to compete on anything except price then levels of service had to be dramatically improved.

As the leading retailer of cars in the UK we have been more than aware of this growing trend. We are therefore investing heavily in the training of our staff and re-examining our operating procedures to ensure that we are now focused on the needs of our customers. It is our intention to lead the way to creating a better car retailing industry and to set the standards for others to follow.

We in Lex find the information from the Lex Report on Motoring vital to this task. We hope by making the report widely available to the entire industry it will help to raise the standards for all of us.

I hope you find the report helpful and useful.

A handwritten signature in black ink, appearing to read "Trevor Chinn", with a long horizontal line extending from the end of the signature.

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

BASIS OF THE RESEARCH

The 1994 Lex Report on Motoring presents the findings of a survey specially conducted for Lex Service by MORI among Britain's regular car drivers, defined as those driving at least once a month.

MORI interviewed a representative quota sample of 1,720 drivers in 175 constituency sampling points throughout Great Britain. The sample was boosted to bring up the total number of those with their own company car up to 320 so that this group of drivers could be looked at in more detail. Data were then weighted to match the known profile of drivers in Britain. All interviews were conducted face-to-face between 12 and 25 October 1993.

Terms

Where sub-group bases are given in summary tables in the report these are unweighted – i.e. the actual number of people interviewed in that group.

In the text we have used the term 'company car driver' to mean anyone driving a car owned by their employer. Company car drivers comprise those for whom the car they drive most often is either provided by their employer or bought as their business expense.

	Number interviewed %	% of total sample (weighted)
Car provided by respondent's employer	239	7
Car bought as respondent's business expense	81	2
TOTAL	320	9
(Car provided by other employer/bought as other's business expense)	(14)	(1)

Additional data for the charts are given on pages 131-140.

Statistical Reliability and Definitions

The appendix gives details of the statistical reliability of the research and definitions and should be consulted for more information. Unless specifically mentioned 'don't knows' are excluded.



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TOMORROW'S MOTORING

**An analysis by The Henley Centre for Forecasting
for Lex Service PLC.**

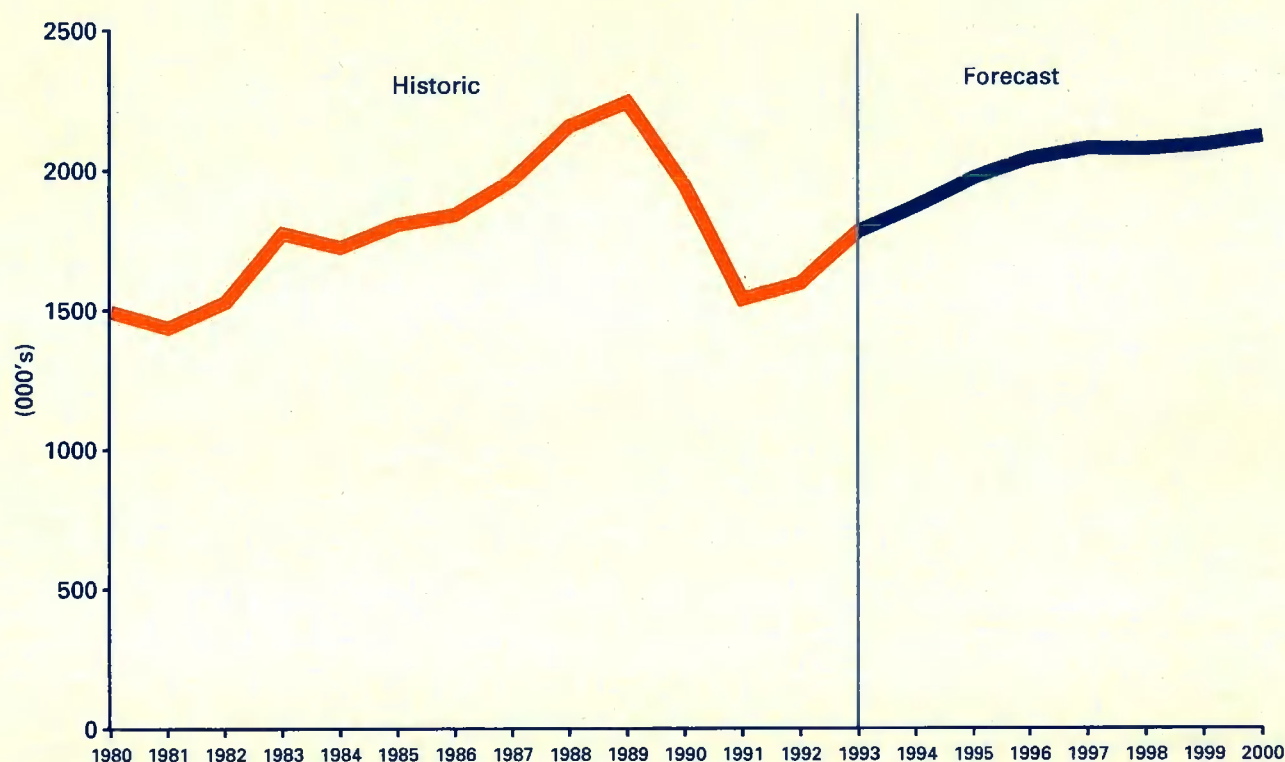
Detailed statistics for the charts are given
in the data tables.

INTRODUCTION

In this analysis, using the results from the Lex Reports of the past five years, we highlight some of the ways in which tomorrow's motorists are likely to differ from today's. We will examine the amount they will drive, their concerns and fears, the cars they will drive and the roads they will drive on. In part, this analysis is derived from a special survey into the attitudes and car-related behaviour of the true motorists of tomorrow – today's teenagers.

OUR RELIANCE ON THE CAR

New car sales: 1980-2000

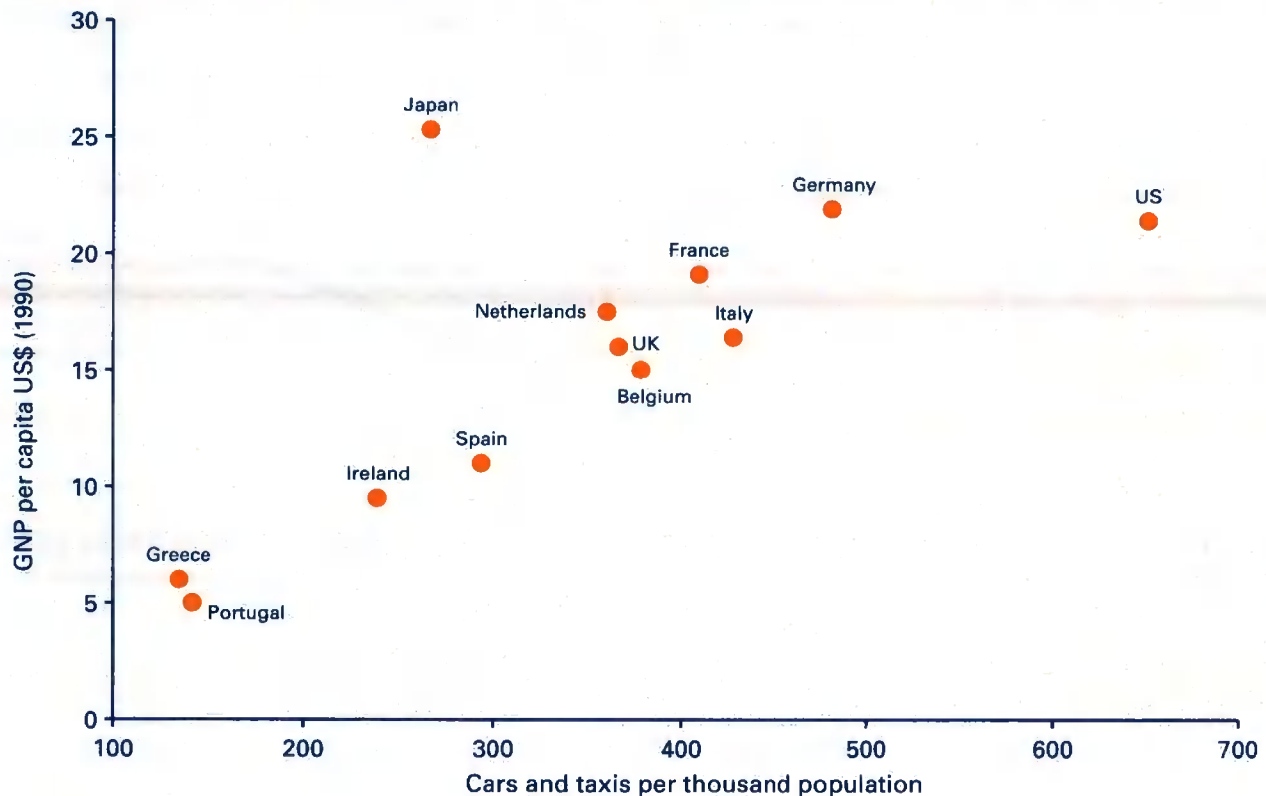


Source: DoT/The Henley Centre

The car industry suffered a miserable recession but, as the economic recovery slowly rumbles along, it has, in time honoured tradition, bounced back with a quite spectacular 1993. If the car industry continues to react to economic conditions in the way it has in the past, then we would expect sales to recover to near their record levels of 1989 by around the turn of the century.

The relationship between economic growth and growth in car ownership is well established, as illustrated by the chart below on differences between economic wealth and car ownership across Europe. It is worth questioning, however, as we look to the future, if this will continue to hold good or will the twin threats of congestion and environmental concern cause people to seriously reconsider their allegiance to the car.

Car Ownership per Capita GNP

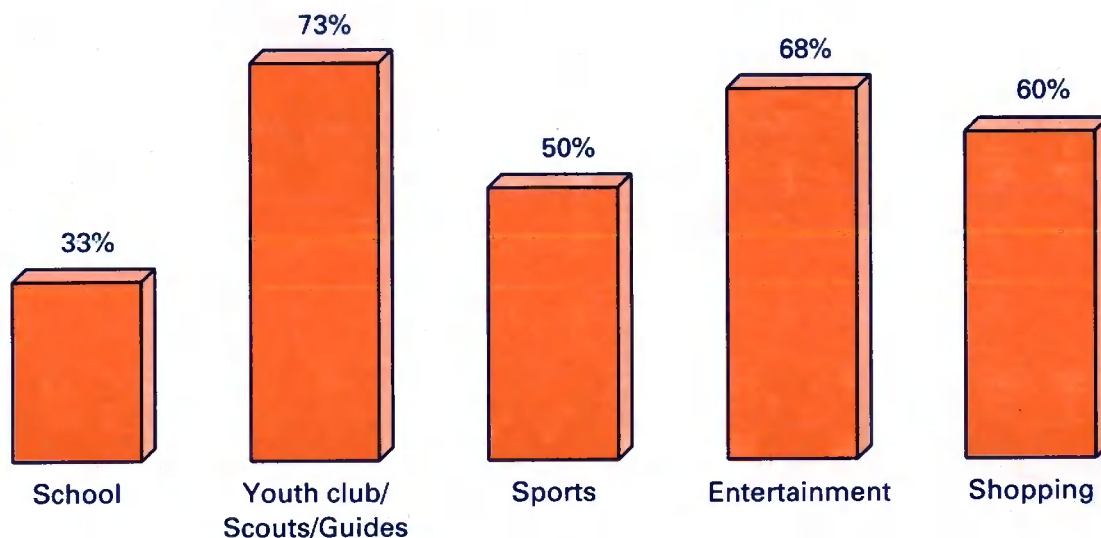


Source: DoT

The Lex Reports and other research have shown that, whilst these concerns are very real and likely to grow in importance, the car is simultaneously becoming more intertwined in our daily life. Over 80% of both men and women interviewed in the survey claim that they would find it very difficult to adjust their lifestyle to being without a car and 84% of people believed that cars are essential for modern living. Even though an increased number of people claimed this year that they would use the car less if public transport were better (39%), it seems clear that there is still a chasm between the convenience people need and the quality and scale of service on offer. Doubling the number of rail miles travelled would only take car mileage back to the levels of 1988.

The children of today's motorists are as dependent as their parents on the car, with 80% agreeing that cars are essential for modern living. We can see in the chart (next page) why they say this, many more of them are being ferried around in their parents' car than was ever the case in the past.

13-16 Year Olds' Use of the Car for Transport
 % of 13-16 year olds doing each activity who use car to get to activity



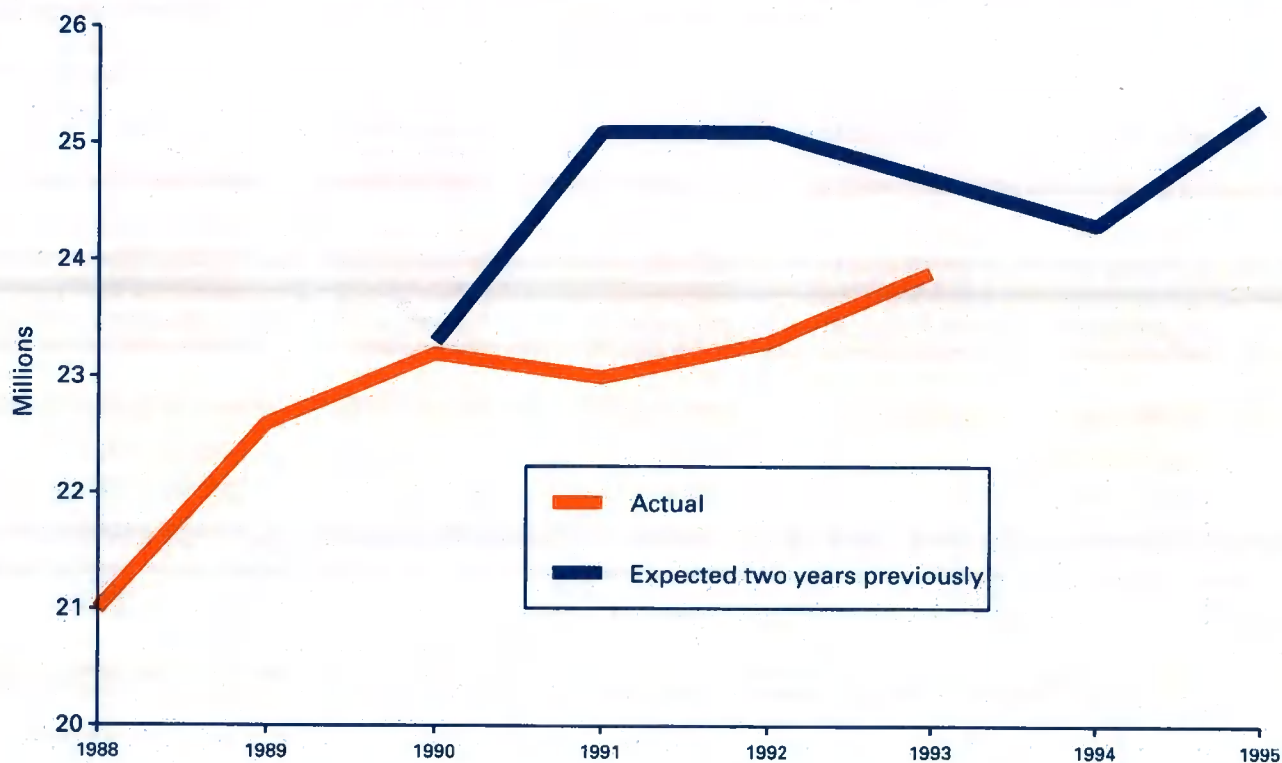
Base: Those who do each activity

Source: Lex Report on Motoring 1994, The Consumer View/MORI

It is the changing infrastructure of society that is making people ever more reliant upon the motor car. Shops, the workplace and leisure facilities are all located and designed with the car in mind. In addition, the variable quality of public transport, and the increased publicity surrounding crime on the streets and on buses and trains, makes cars the more secure form of travelling.

Whilst we will illustrate in later analysis that the car industry has no grounds for complacency we are sure that, for the rest of the decade at least, the future of the car industry is secure.

Grossed Up Estimates of Numbers of Cars in Britain at Time of Surveys and Expectations in Two Years' Time

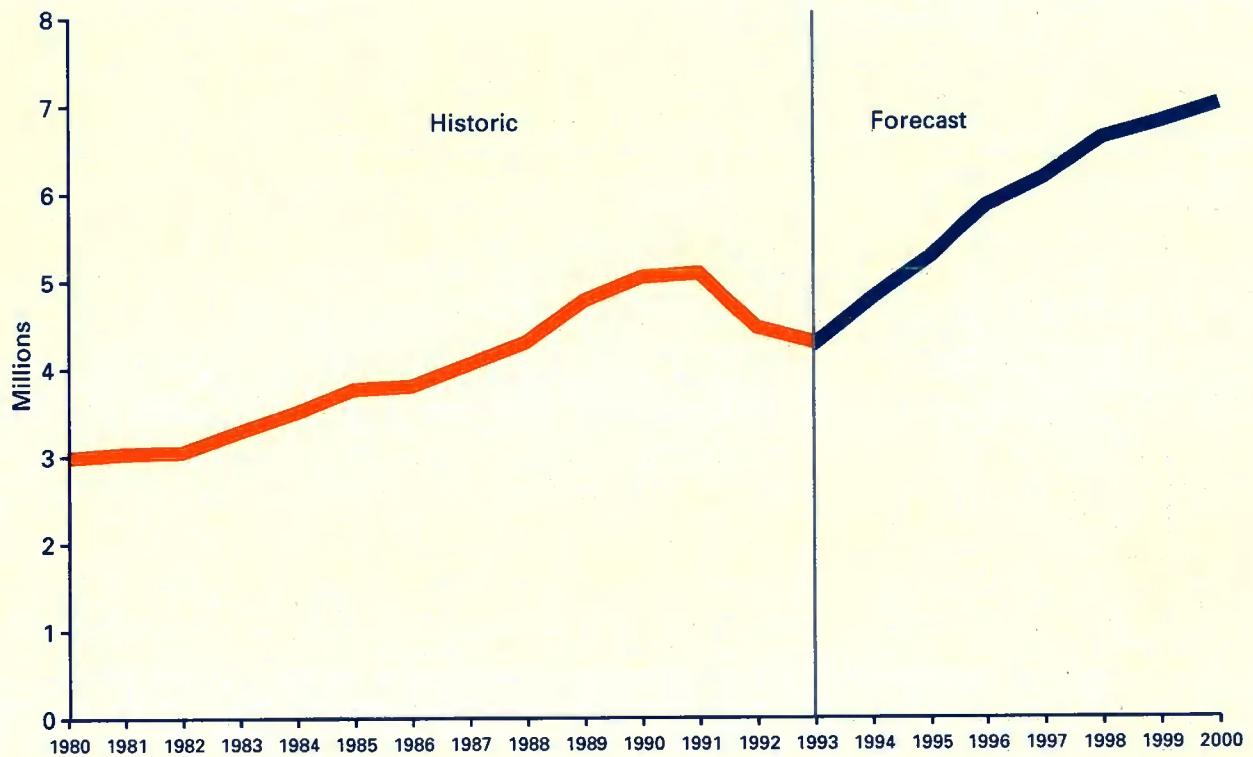


Source: Lex Reports: 1989-1994

In this year's survey for the Lex Report, as in previous MORI surveys, motorists were asked to estimate the number of cars they expected to have in their household in two years' time, which has then been grossed up to give an estimate of the expected growth in the car parc. Whilst consumers (and many forecasters!) are renowned for extrapolating either the gloom or hope of today into the future, we can see how confidence is growing and that the recent declines in the car parc are now behind us.

Growth in the car parc over the past 20 years has been fuelled by economic growth and social change, such as the growth in single person households and, importantly, changes in the number of multi-car households. Slightly fewer households had second cars during the economic recession but, even so, the 1994 Lex Report indicates that around 40% of households with cars now have more than one car. We see a strong resumption in the growth of second cars as the economic upturn consolidates, particularly for higher income groups. This growth in second car ownership will be reinforced by trends such as the growing economic independence of women, the likelihood that families will increasingly need different cars for different purposes (a car which is suitable for taking on holiday may be different to one which is appropriate for travel to work), and the increased desire for independence of young adults still living with their families.

Growth in The Number of Multi-Car Households

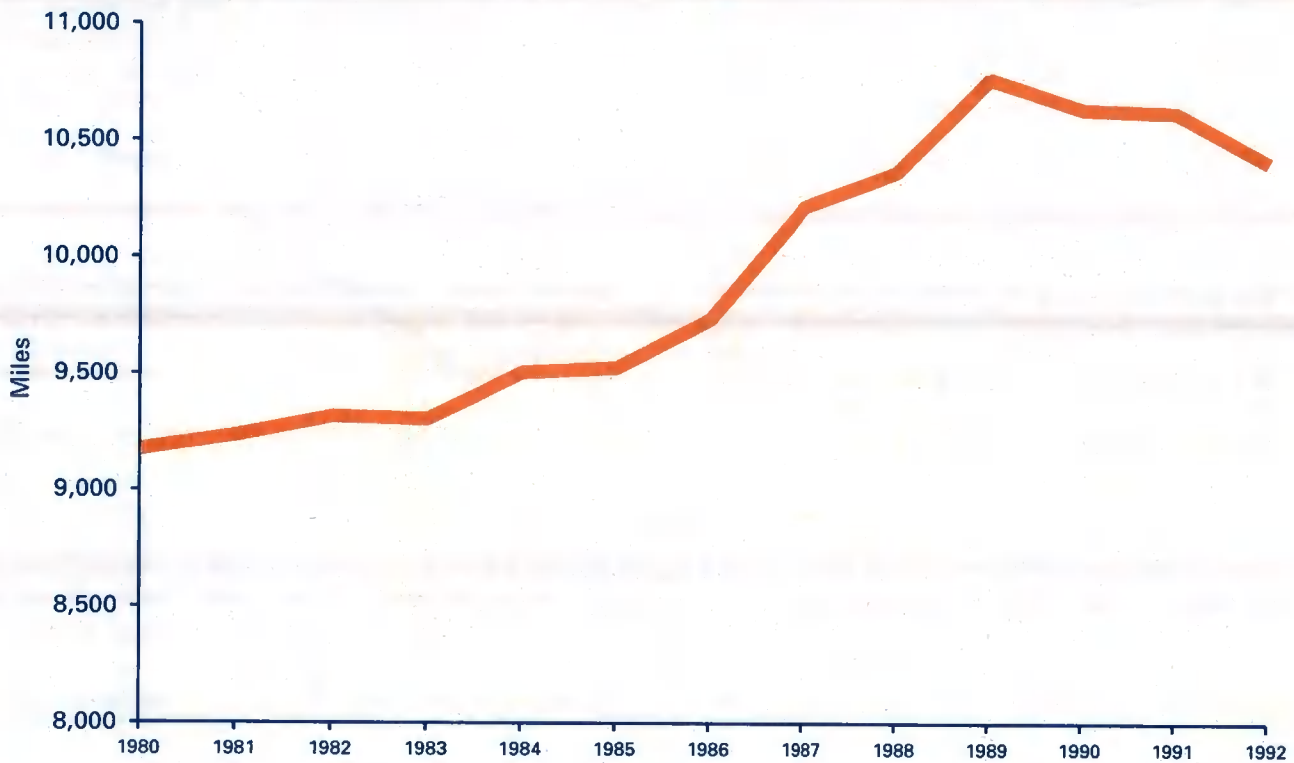


Source: DoT/Lex/The Henley Centre

Car mileage too, is expected to see further increases. The growth of second cars in households has not been causing the average number of miles we drive per car to decrease. As can be seen from the chart below, average mileage has fallen during this recession, but this year's Lex Report indicates that it is starting to rise again. Whilst this is likely, at some stage, to reach a plateau, we do not believe we have reached that point yet – again because of the changes in our infrastructure that increasingly demand that people become more reliant on the car.

Our estimate, and one that is broadly in line with official estimates, is that total car mileage could grow by up to 30% by the end of the century. This growth is fed by two determining factors; the growth in the total car parc and the growth in average miles driven per car. During the economic growth years of the eighties, the car parc was growing at over 3% per annum and the average mileage driven per car by just under 2% per annum, with the total car mileage thus growing by about 5% per annum.

Average Number of Estimated Miles Driven per Car per Year



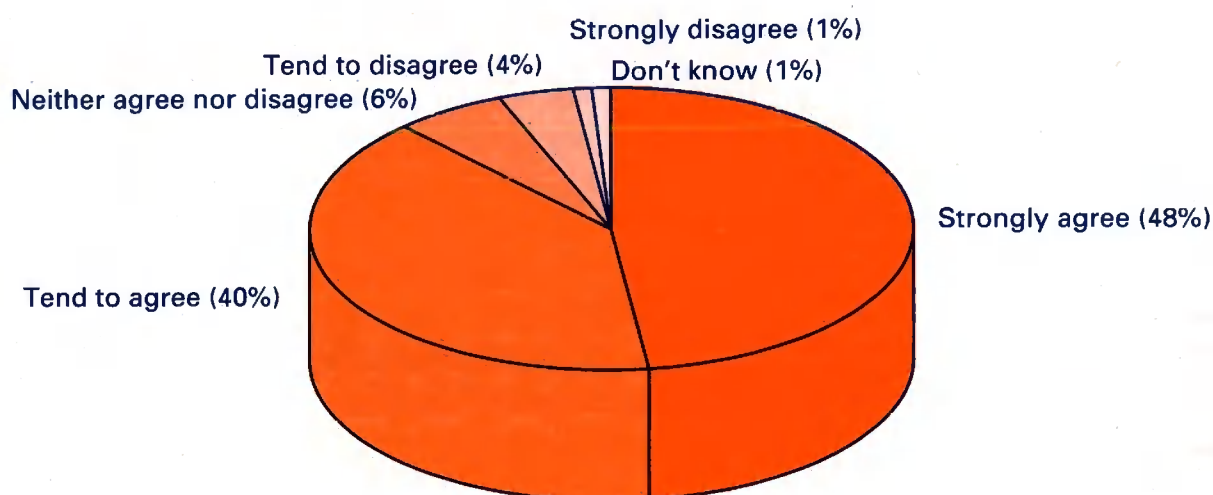
Source: DoT

Whilst in the longer term a viable alternative to the motor car may be developed, it seems certain that it will be with us for a long time to come. What sort of motoring world, therefore, would today's drivers like to see in the future?

THE ROADS WE DRIVE ON

Concern with Congestion

% agreeing 'Congestion is a major problem in this country'



Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Close to 90% of motorists agree that congestion is a major problem in this country.

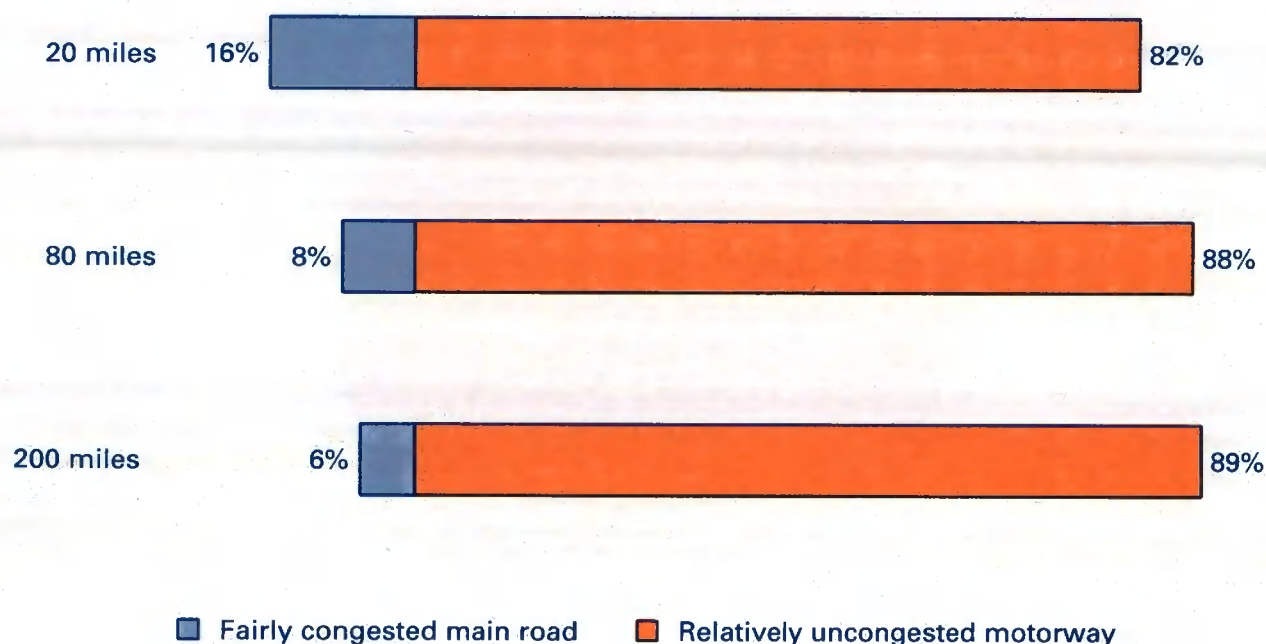
With car mileage rising by over 50% during the eighties and the amount of roads increasing by only 6% it is not surprising that the 1994 Lex survey shows road congestion to be one of the most talked about problems of driving. Both Department of Transport and National Travel Survey data show that the number of people using private transport to enter central London during the morning peak hours has, in fact, been declining. On the other hand, more drivers are using their car to commute in outer London, the conurbations, and most other parts of the country. Overall, car commuter mileage per worker per year has, in fact, risen by 20% between 1985/86 and 1989/91, according to the National Travel Survey.

Proposals which have been put forward to deal with congestion include road pricing and an additional fuel levy. The government, during the last budget, emphasised its commitment to electronic road pricing once the technology becomes available. The crucial question, however, is how people are likely to react to pricing. What impact would this have on road traffic and how much money is likely to be earned?

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In this year's survey we examined the level of tolerance there was to the idea of road tolls both on Motorways and in City Centres.

Preferred Method of Travel



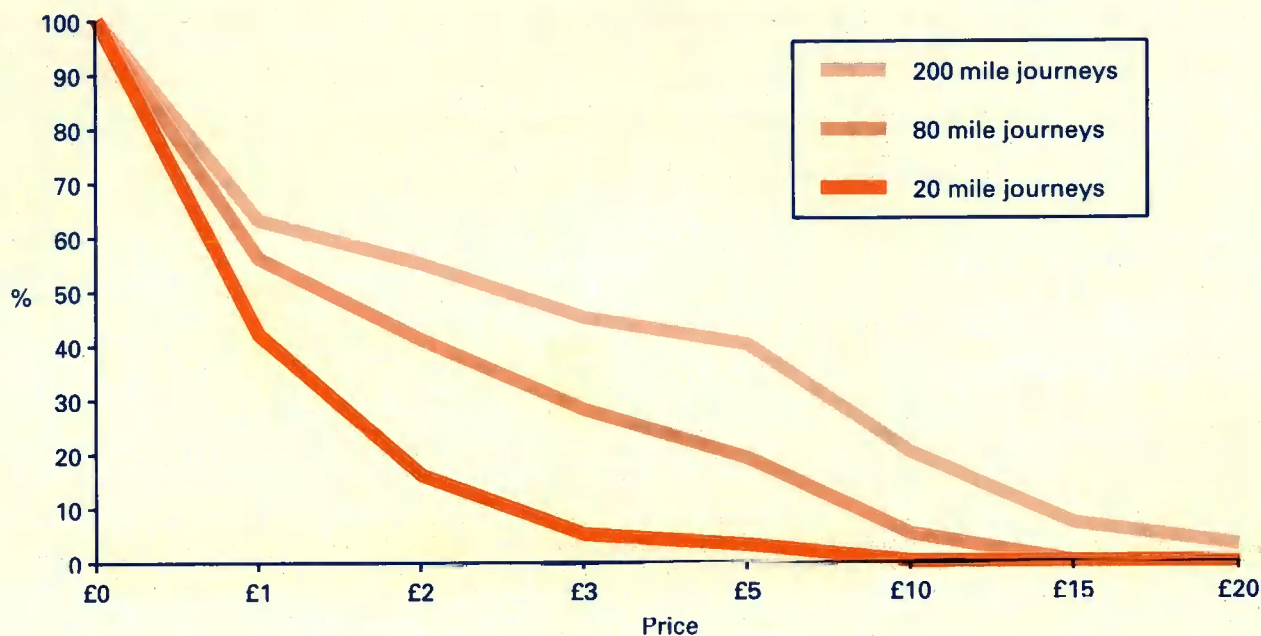
Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Most motorists would prefer to use an uncongested motorway rather than a fairly congested main road when making a journey for either personal or work related business. The longer the journey, the greater the proportion of motorists who would want to use the motorway. It is generally apparent from the Lex Report data that motorways are not only used for long distance travel, but are almost equally attractive for some short distance journeys, as an alternative to congested main roads. Hence the unforeseen problems with congestion on the M25.

Current Motorway Drivers' Willingness to Pay Tolls

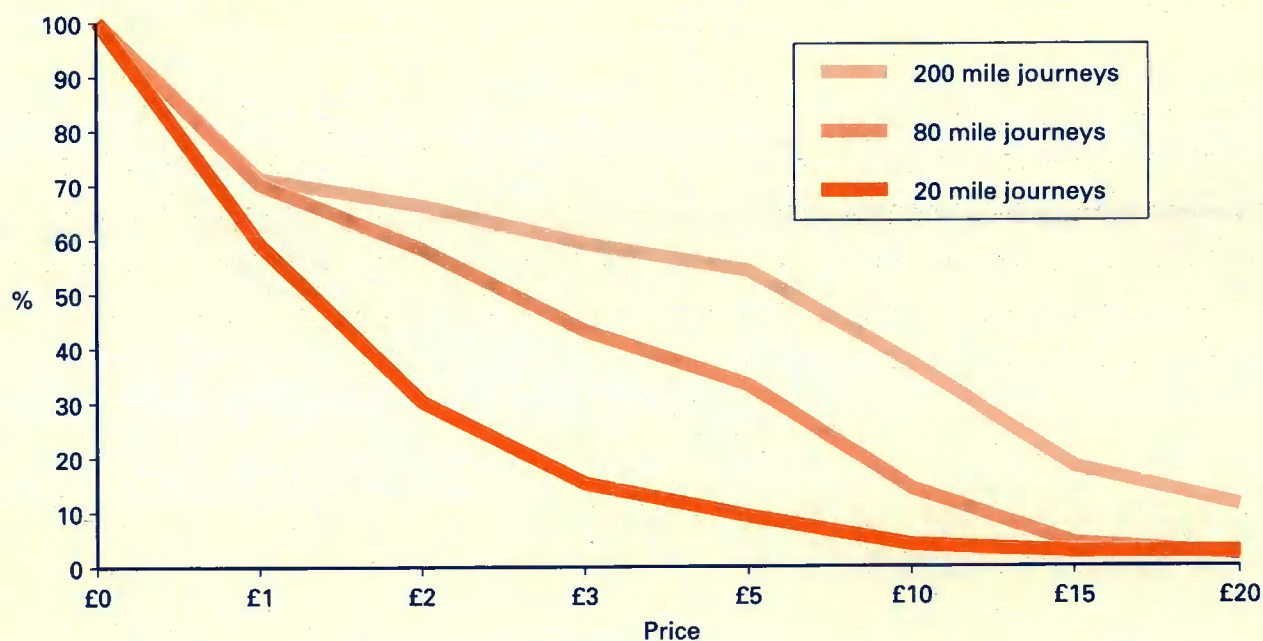
% of Drivers who Currently Use The Motorway for Leisure/Commuting Journeys
Who Would be Prepared to Pay Different Levels of Toll



Source: Lex Report on Motoring 1994, The Consumer View/MORI

Current Motorway Drivers' Willingness to Pay Tolls

% of Drivers Who Currently Use The Motorway for Work-Related Journeys
Who Would be Prepared to Pay Different Levels of Toll



Source: Lex Report on Motoring 1994, The Consumer View/MORI

The more important point, however, is whether motorists would be prepared to pay to use an uncongested motorway as an alternative to a busy main road. For short journeys of 20 miles the majority (58%) of drivers who currently would do leisure or commuting journeys on motorways rather than on a busy main road, claim they would not be prepared to pay anything to use the motorway. This reaction against the idea of motorway tolls does not diminish significantly even when they are considering long journeys. When the journey length is extended to 200 miles, around 37% would not be prepared to pay any toll at all to use an uncongested motorway.

The Lex Report indicates that drivers are slightly more willing to pay money to use a less congested toll motorway if they are making the journey in connection with work.

Using the above data, and making the assumptions that, on average, journey lengths on motorways are 80 miles and that 50% of car journeys are leisure related and 50% business related, tolls would have the following effect on miles driven by cars on motorways and would raise the following amounts of revenue.

Price Pence per mile	Mileage Billions	Reduction %	Revenue £'s Million
0	29	0	0
1.25	18	37	228
2.5	14	51	357
3.75	10	64	388
6.25	7	74	463
12.5	3	90	346
18.75	1	98	98
25	under 1	99	87

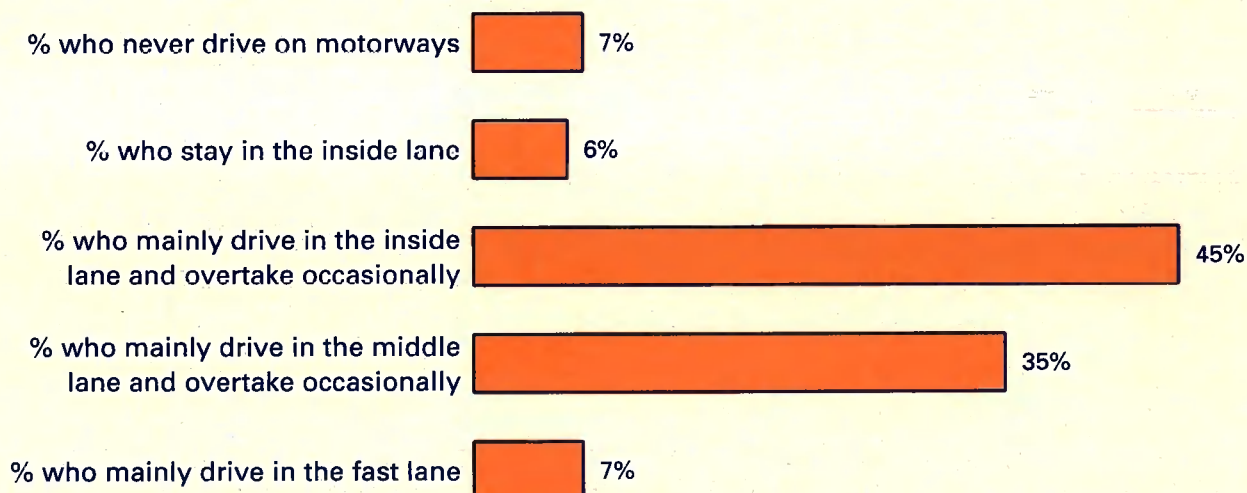
The reality will clearly be somewhat different, as examples of toll roads in Europe have shown. What these data do show, however, is that it is a sensitive issue to the driving public at the moment. As well as seemingly bound to cause controversy if and when pricing is introduced, the market seems to be very sensitive to the proposed price. The Lex Report indicates that raising the price from 1.25 pence per mile to 3.75 pence per mile would cause a further 37% of current motorway drivers to stop using them.

For those people who would be willing to pay to use motorways, who not surprisingly are more prevalent in higher paid occupations, then the motorways of Britain are likely to be a transformed experience. This data, even if there is a slightly less aversive consumer reaction in practice, suggests that motorways will be a very fast efficient way to travel, evoking memories of the M1 when it was opened back in 1960.

The Lex Report also assessed the degree of public support for the imposition of a toll to enter city centres. It found that while a positive balance of 12% of motorists would support the imposition of a £3 charge to enter the centre of London, a negative balance of -2% and -30% would, respectively, oppose the imposition of a similar charge to enter the centres of other major cities and general large towns and cities in the UK. These divergent results are likely to be a function of the fact that Londoners tend to drive less into the centre of their city than people living in other towns and cities in the country. According to the Lex Report, 67% of people claim that they *never* drive into the centre of London, while the respective figures for other major cities and town centres are 29% and 9%.

To sum up, while congestion is considered by most people to be a major problem, there is some reluctance to pay tolls, although where the proposal of imposition of tolls is in areas where they experience genuine problems – such as London – then they can see the personal benefit in such a system.

Use of Motorway Lanes



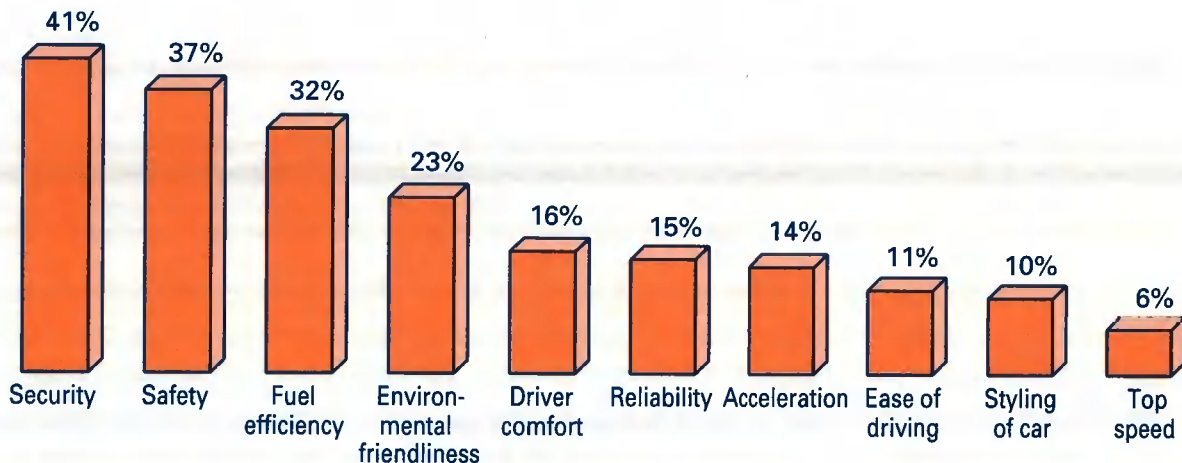
Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Finally on congestion, the Lex Report this year examined one other potential cause of congestion on motorways – people not using motorway lanes as advised. It is clear that it is only a slim majority of people who say they generally use the middle and outside lanes as overtaking lanes, preferring to cruise in either of these lanes. This seems to be a peculiarly British habit. When probed why, it is clear that people are trading off speed and safety. Given that there are question marks over whether either is helped by current practices, it suggests that some educational or regulatory intervention may be helpful.

CONCERNS AND FEARS

% of People Who Would Like to See Improvements in Different Features in Their Next Car



Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

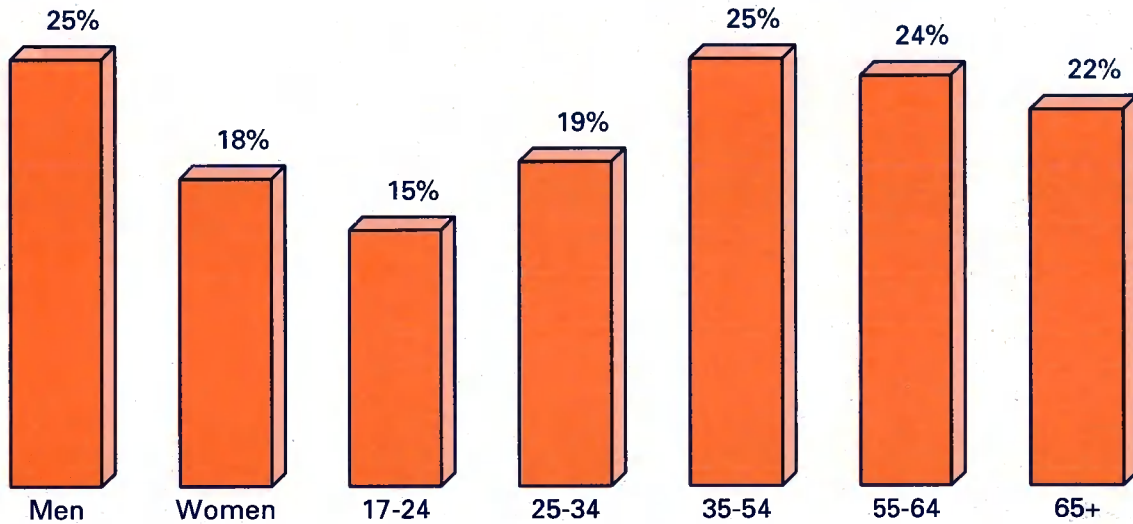
There are three main concerns facing today's motorists; safety, security, and environmental considerations, as well as congestion which we discussed above. When asked, drivers spontaneously mention concerns regarding traffic speed, inconsiderate drivers, worries about the ability of their cars to withstand a crash, car theft, vandalism and personal security in their car.

As indicated earlier, the 1994 Lex Report shows that these are as yet not sufficiently strong to induce people to switch from car travel to other modes of transport, but could nevertheless influence the type of car that people would prefer to purchase.

Safety

The 1994 Lex Report shows that only around one-fifth of motorists are currently happy with the safety features of their car, and close to 40% of drivers want to see this significantly improved in the next car that they purchase. The concern with safety was more acute among women than males, and especially strong among the 17 to 24 age group of which only 15% were happy with the safety aspects of their current car.

% of people happy with the safety features in their car

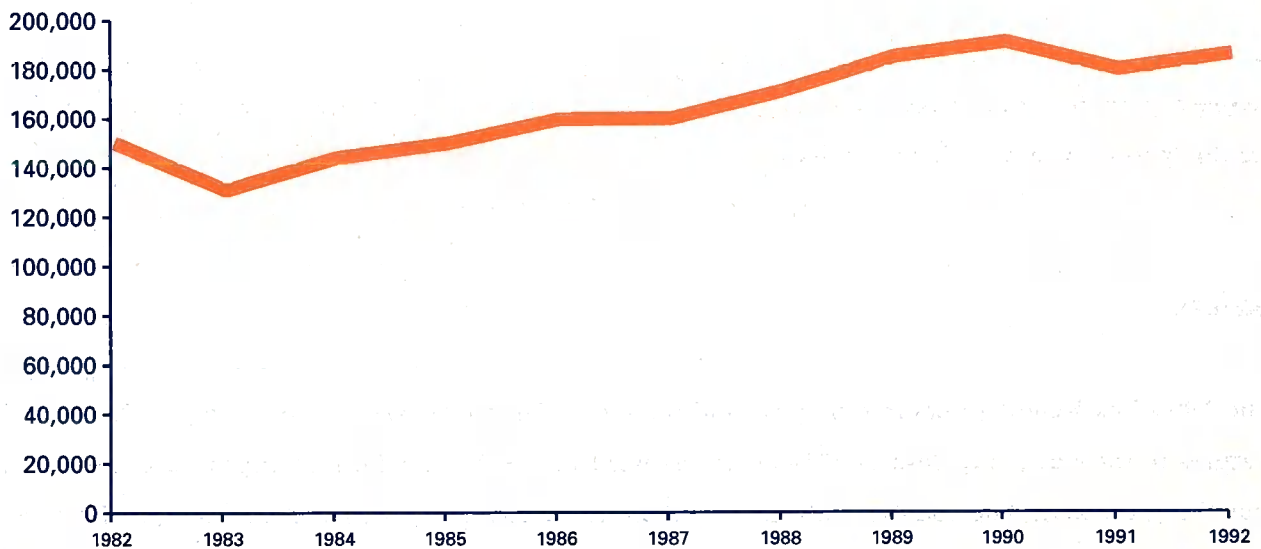


Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

This appears to be driven by awareness of safety issues in general rather than concerns arising out of increasing danger. The number of people being killed or seriously injured has actually fallen over the past ten years, although the total number of injuries of any sort, as a result of car accidents, has been rising.

The number of car related injuries

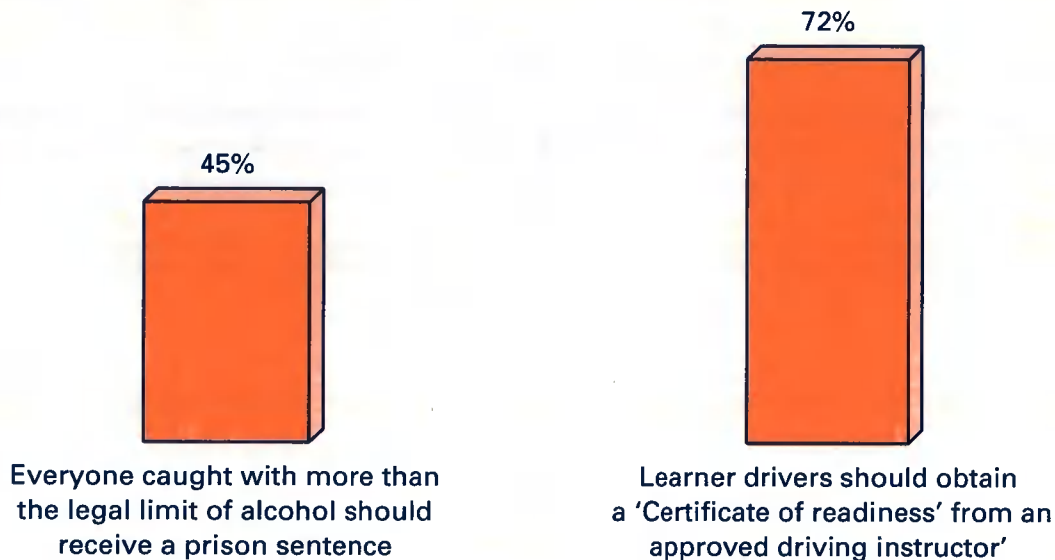


Source: DoT

The fact that safety on the roads is an important consumer concern leads to the question of what people expect should be done to improve it. From this year's survey it is clear that expectations are that the responsibility should be shared between Government and manufacturers.

The Government has already enacted measures such as installing road cameras and passing the back seat seatbelt law. This year's survey show that there is widespread support for the Government to impose further measures including imposing tougher curbs on drink driving and tougher driving tests.

Support for tougher Government measures



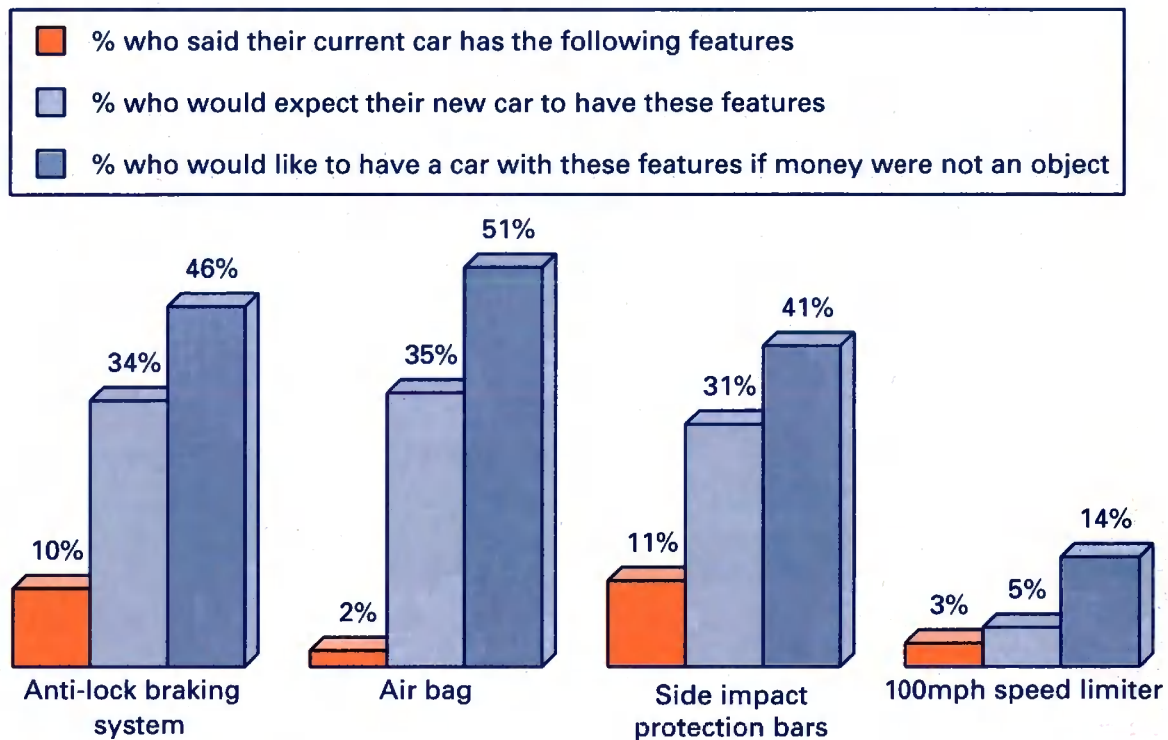
Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

It is also clear that a far higher number of drivers would expect and like their car to have features such as an anti-lock braking systems and air bags. Expectations that the respondent's next car would have these two features rose substantially from last year's Lex Report to this; from 24% to 34% for ABS and from 9% to 35% for air bags.

There are question marks about how much consumers will be willing to pay, but at the right price it is clear that this will be an increasingly important point of differentiation between manufacturers in the future.

Safety features and manufacturers



Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Whilst consumers believe that safety is someone else's responsibility, it is apparent from their responses that much of the responsibility lies with themselves. Despite the seatbelt law, as high as one-fifth of drivers admit to driving without a front seatbelt within the last 12 months. Three-fifths of drivers admit to exceeding the speed limit on normal roads in this time period and, quite apart from the cost of installing them, Government installation of speed cameras appear unlikely to be sufficient on their own in improving road safety to the desired extent.

Data from this year's Lex Report shows that the number of police convictions for driving offences are, at a maximum, less than a sixth of the actual number of offences committed. That is assuming that every motorist that said they committed a traffic offence in the Lex Report committed it only once!

Getting away with it

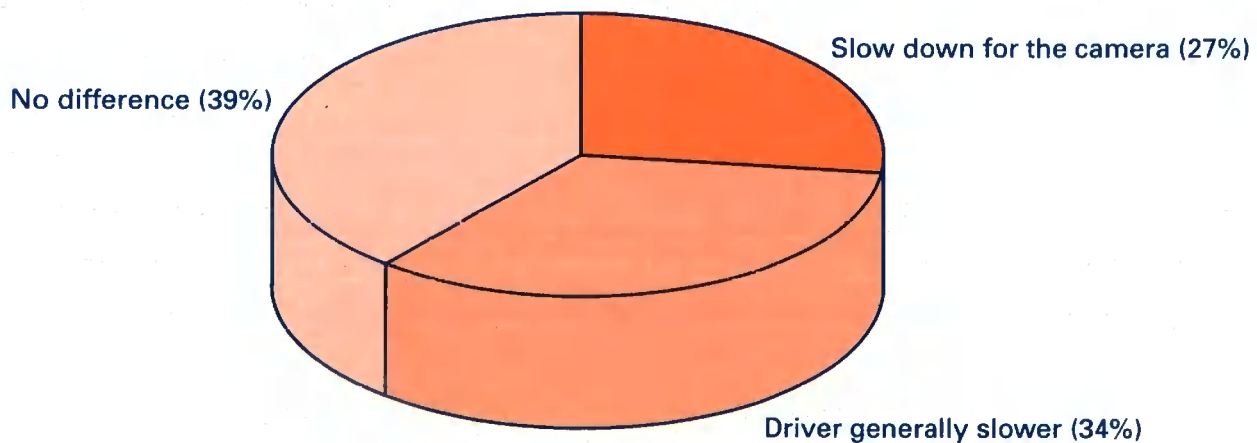


Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Similarly, whilst the introduction of roadside cameras has had some effect on driving behaviour, as you would expect the main impact has been on the roads on which the cameras are present, rather than changing driver behaviour in general, and, for many, it changes their behaviour only within a few hundred yards of the camera itself!

How roadside cameras have affected driving behaviour



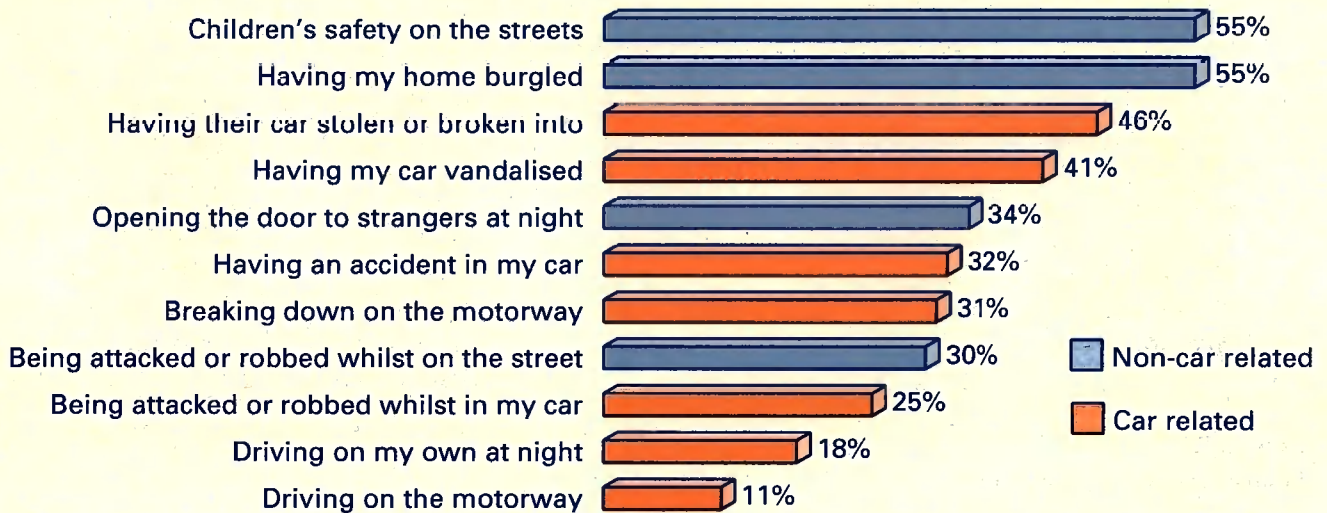
Base: 1,175

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SECURITY

Today's drivers' concerns

Q "Which, if any, of the following do you particularly worry about these days?"



Base: All drivers (1,720)

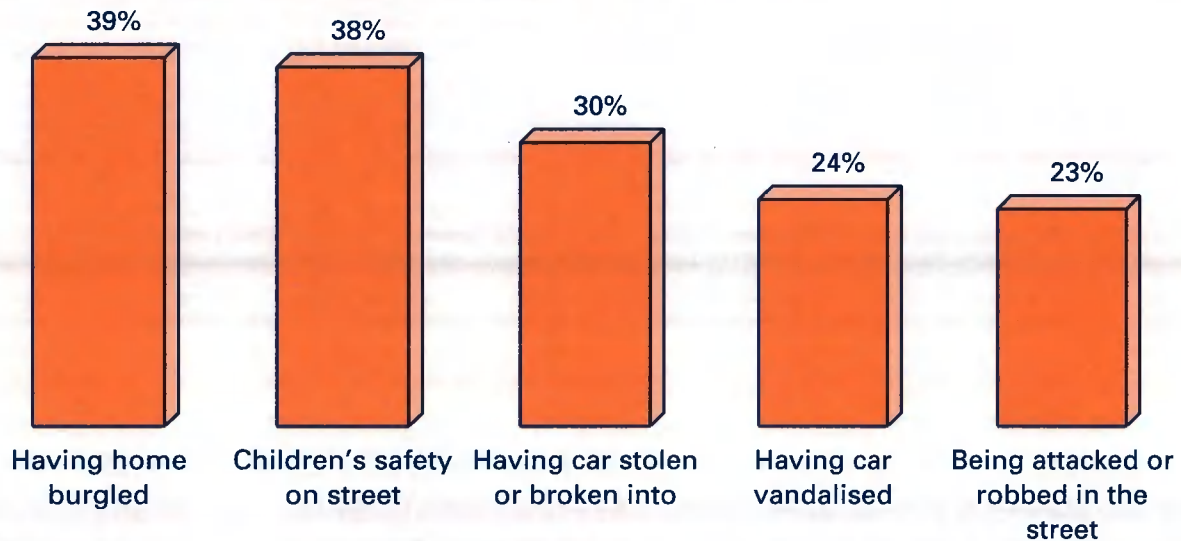
Source: Lex Report on Motoring 1994, The Consumer View/MORI

Concern about personal security has been growing in society generally, due to a combination of factors including rising unemployment, widening gulfs between the haves and the have-nots and other moral and social issues that are less easy to untwine.

The 1994 Lex Report shows that, of all the crime related concerns asked about, only fears about having their home burgled and about the safety of their children on the streets worry them more than the possibility of having their car stolen. In fact, 46% of motorists are, according to the report, particularly worried about having their car stolen or broken into and 30% are more worried about this possibility today than they were a few years back particularly amongst men. Around 25% of the respondents were particularly concerned about being attacked or robbed while in their car, with almost 20% more worried about this possibility today than they were a few years back, particularly amongst women.

Young drivers in the 17 to 24 group appear to be most concerned about having their car vandalised or broken into.

The things people are worrying more about now compared with a few years ago

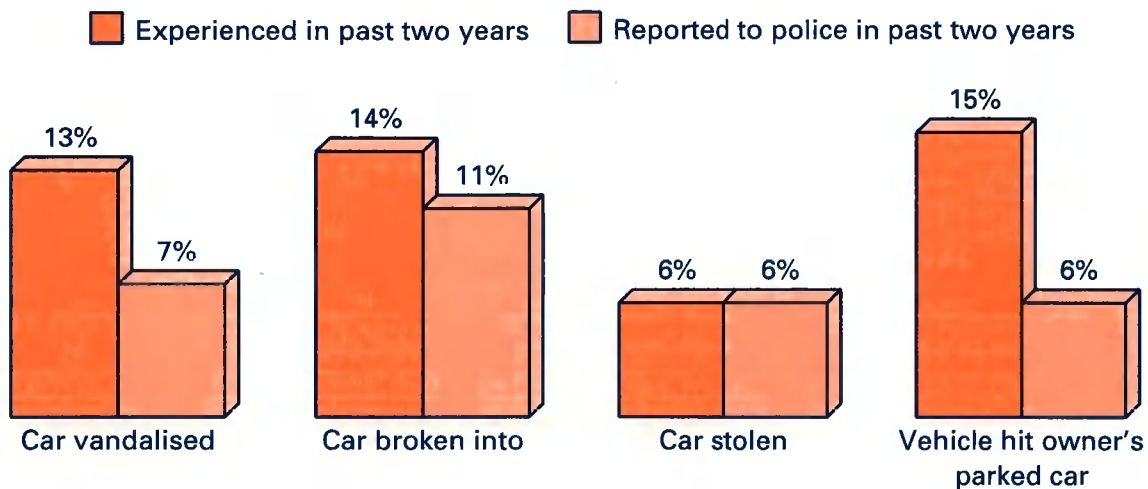


Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

A point brought out by the Lex Report is that, especially in the case of car break-ins, there exists a discrepancy between the actual and reported level of offences. The chart below indicates that official statistics underestimate the level of these crimes since they are frequently not reported to the police.

Experience of car crime

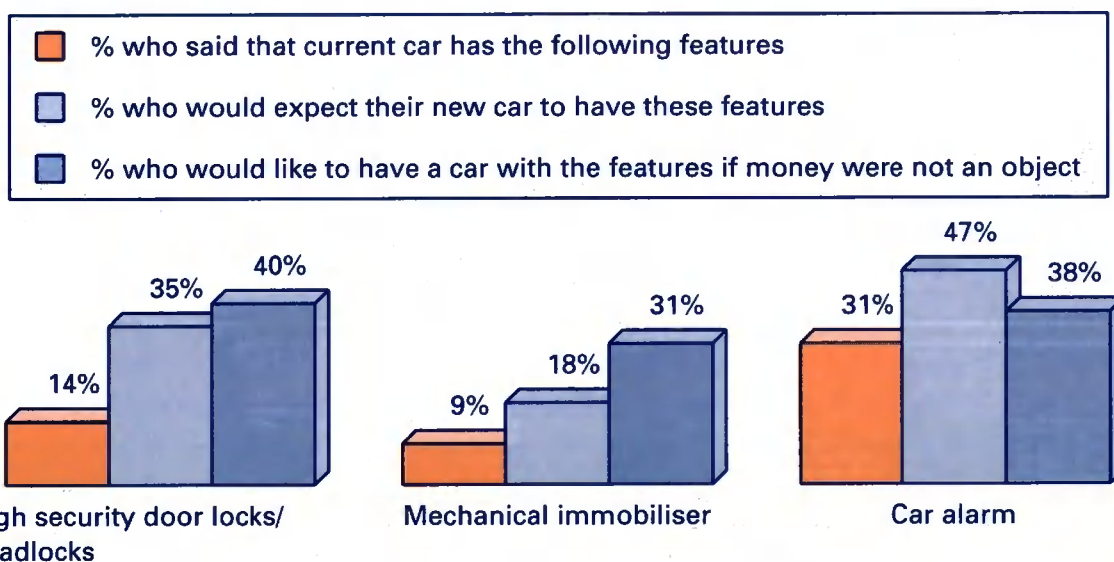


Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

In contrast to their views about safety, consumers believe that most of the responsibility for change, with respect to security, lies with manufacturers. A significant number of people expect their next car to have security features such as a burglar alarm, high security locks/deadlocks and central locking. An efficient locking system would also reduce the risk of people being attacked in their vehicles. The Lex Report shows that only 18% of motorists are currently happy with the security/theft prevention features of their car, and over 40% want to see this feature significantly improved in the next car that they purchase.

Security and manufacturers



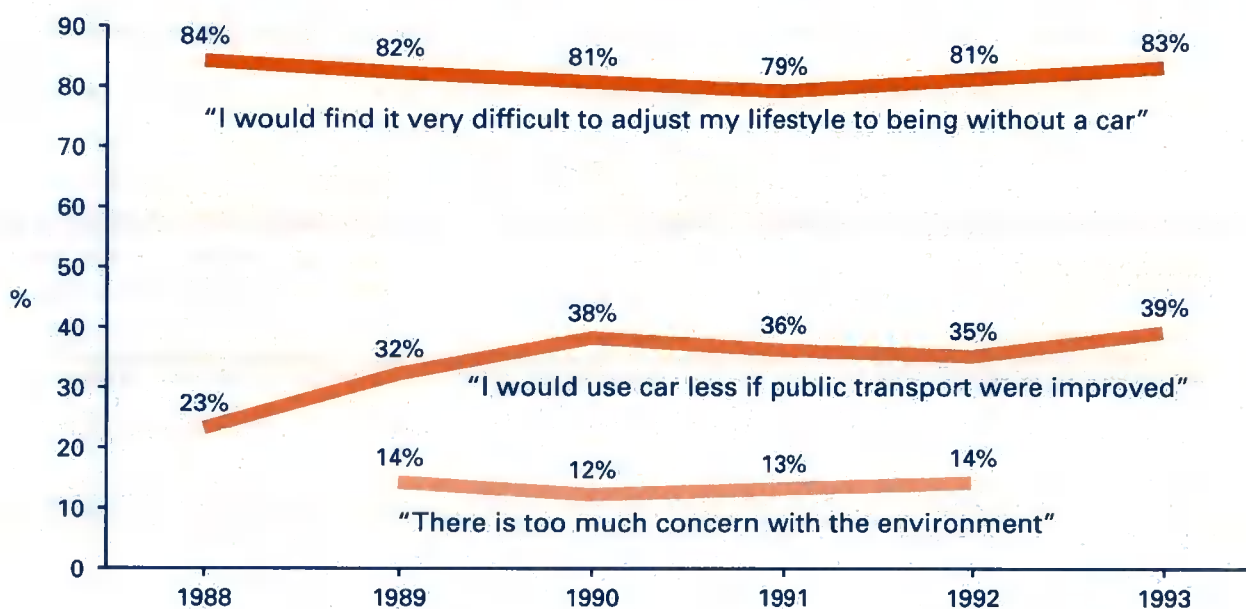
Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

ENVIRONMENTAL CONSIDERATIONS

The Lex Report and other data show how there is a tension between the green consciousness and guilt that the majority of people now feel and the consumption patterns and lifestyles that people now enjoy and will fight and vote to protect.

The Green Consumer



Base: All drivers

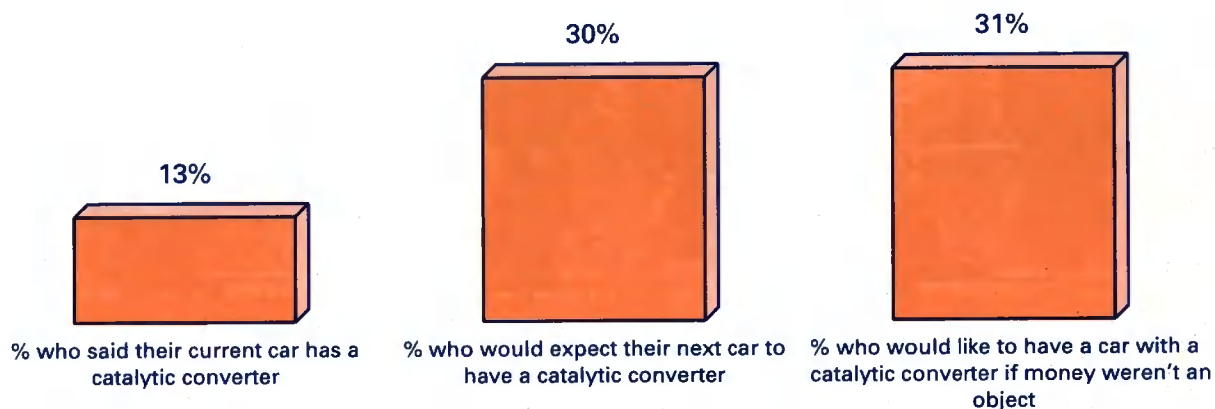
Source: Lex Report on Motoring 1994, The Consumer View/MORI/Target Group Index (BMRB)

Environmental concern took something of a back seat during the recession, but remains an important issue and is something the Henley Centre believes will be an important long term issue. For example, the percentage of drivers who can and do use unleaded petrol has now, according to the Lex Reports, risen from 5% in 1988 to around 50% today. Not all of this growth can solely be put down to the price differential of leaded to unleaded petrol.

At the same time as environmentalism has emerged as a key factor in the car market, so has apparent reliance on the car. What emerges is the light green consumer. In the 1960s being a Green Consumer was an oxymoron, but we have now squared this circle and the expectations are that manufacturers will allow consumers to have the best of both worlds.

Only 21% of drivers are currently happy with the environmental friendliness of their car, whilst 23% would want to see this feature significantly improved in the next vehicle that they purchase. Apart from lead free petrol, another expected response by the motor industry to the problem of environmental pollution is provision of catalytic converters. It seems certain, however, that if there are future commercial developments that are environmentally friendly, such as 'lean burn' fuel management systems, then consumers will be willing to take them up – at the right price.

The environment and manufacturers



Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

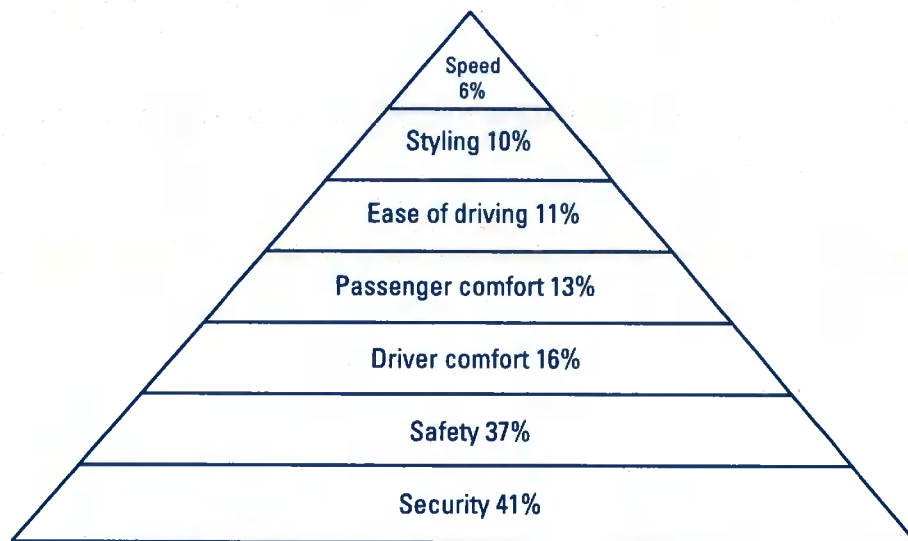
CARS THAT WE DRIVE

Consumers have been conditioned by their experiences of the recent recession to increasingly focus on value across all the goods that they buy. They have adopted a more pragmatic, hard-nosed approach to buying, that has turned the consumer buying priorities of the eighties on their head.

This pragmatism will last beyond the recession into the next two or three years at least. Unemployment, even amongst the middle-classes will remain high, property prices will rise only slowly and, as importantly, it is increasingly unfashionable to be seen to be conspicuously consuming. Nowhere has this changed the marketing environment more than in the car industry.

We can see below the new priorities for consumers in terms of the cars they want.

Features of cars people would like to see improved in the next vehicle they purchase



Base: 1,720

Source: Lex Report on Motoring 1994, The Consumer View/MORI

These changing priorities, away from the 'GTi' era of the eighties, are happening all over the world, not just in the UK. In a recent survey in Japan undertaken by Nikkei Kogyo Shimibun, consumers stated that the key features they desired on a 21st Century car were safety, environmental friendliness and economy.



1994 LEX REPORT ON MOTORING – The Consumer View

Performance is still crucial but is being redefined. It is no longer about speed and styling, although these will remain important, but increasingly about safety, reliability, security, value and environmental friendliness. The Lex Report indicates that with only 55% of motorists claiming any interest in cars, manufacturers are no longer selling an icon – as they were in the fifties and sixties. People, in fact, are approaching the market with as much illusion as if they were buying a vacuum cleaner.

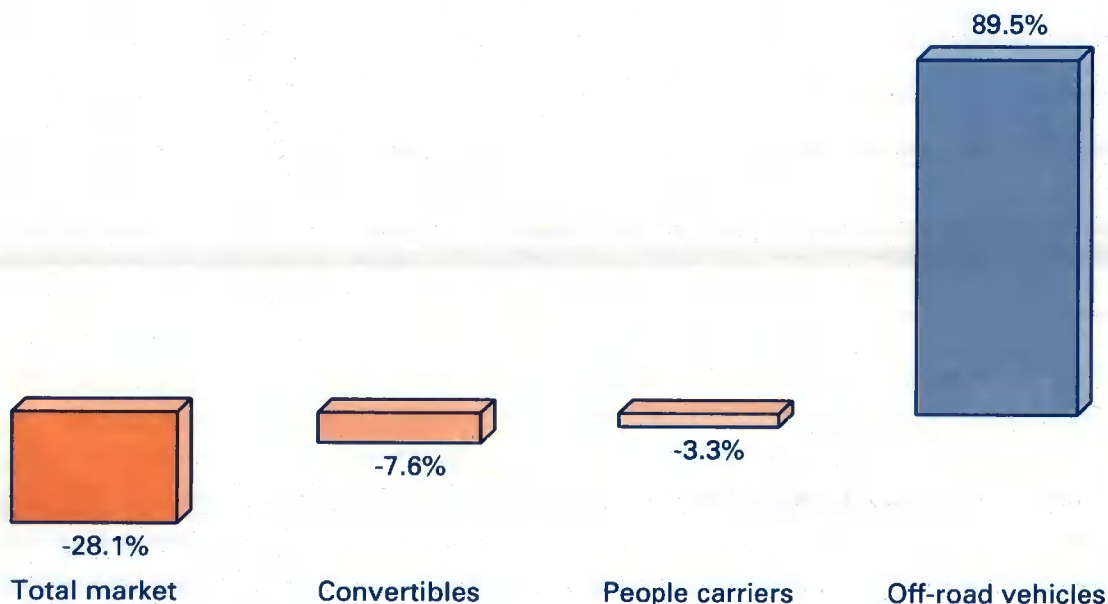
Another key area of change in what people will expect cars to do for them arises from the growth in multi-car households. What this second car market fuels is the purchase of cars with different functions, rather than a do-it-all workhorse. We can see from the quotes below how second cars tend to be used for different purposes than first cars in the household and that it is niche markets which have done well throughout the recession, or rather not done as badly as more mainstream types of cars.

The use of cars in multi-car households

- Female, age 41:** "My car is to get to work and to go from client to client, the second car is for my husband to pop into town and the third is for pleasure."
- Female, age 34:** "My car is used for work, shopping and leisure, the other is used by my husband for work."
- Male, age 29:** "My car is terrible, so I use it for work, social and domestic uses. We use my fiancée's car for long trips."

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Recession-proof niche markets 1988 and 1992 sales compared



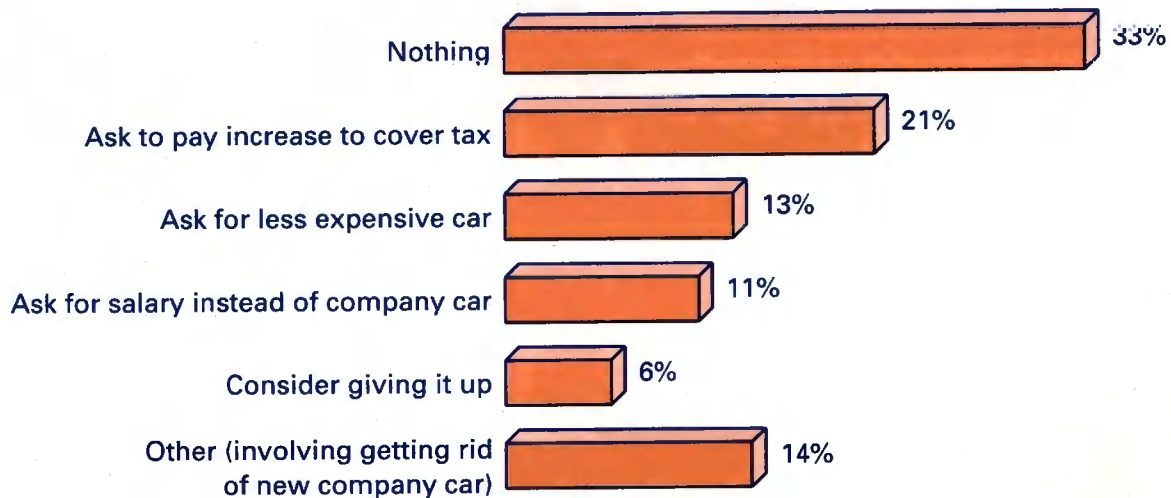
Source: SMMT

With income polarisation set to continue, it will be these niche markets that continue to develop and sell well, with the rich increasingly buying a range of cars for different occasions.

COMPANY CARS

The average level of taxation on company cars has almost doubled since 1987, but new registrations of company cars carried on rising sharply up to 1989 and began to fall only in the recessionary times of the early 1990s. From April 1994, there will be a shift in company car taxation, away from a tax based on engine size towards one based on the list price of a vehicle. This may cause some company car drivers to question the financial benefits of owning a company car. Evidence from this year's and last year's Lex Reports suggests that a number of people are now on the brink of considering giving up their company cars.

Employees claimed current or future reactions to new company car taxation



Base: All who have had a company car in last two years (318)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

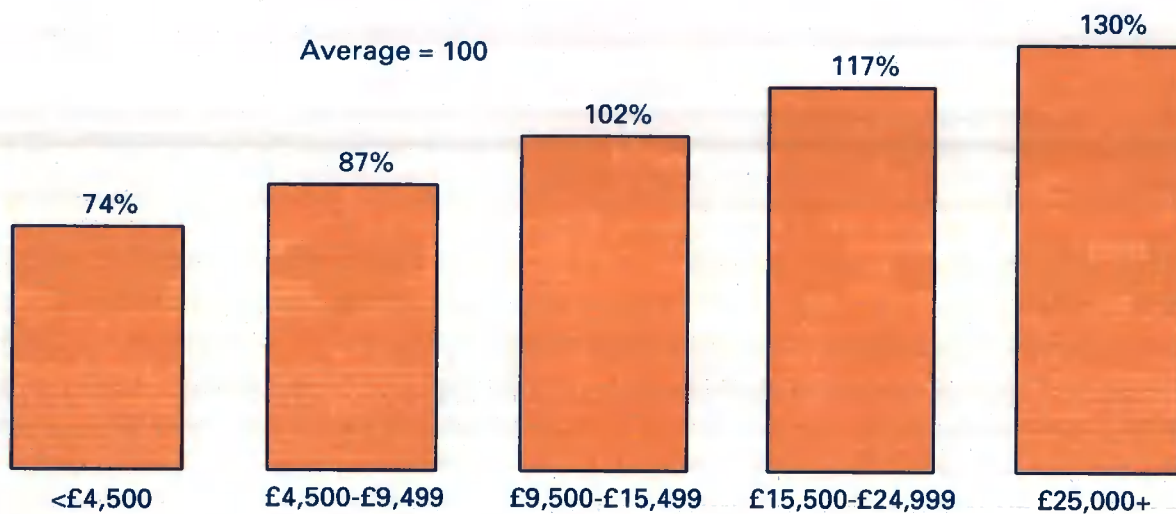
Whilst the data shows up to 20% could give up their company car, it is unlikely to be anywhere near this many. There are two reasons for this:

- i) The benefits of company cars are not solely financial and there are great benefits in the anxiety relief and financial smoothing of expenses they provide .
- ii) Whilst the car is a perk for some, this is a limited number. The Lex Report shows that around 69% of company car drivers consider the car essential for their job and 12% consider it to be helpful for their job.

This reluctance to actually giving up company cars when it comes down to it, is illustrated in this year's Lex Report. 2% of drivers have had a company car in the last two years but no longer have one – of these, however, only 11% opted to no longer have a company car. This is equivalent to less than 2% of the current stock of company cars.

THE IMPORTANCE OF CUSTOMER SERVICE

Demand for improvement in customer service
across a number of consumer sectors - variation with household income



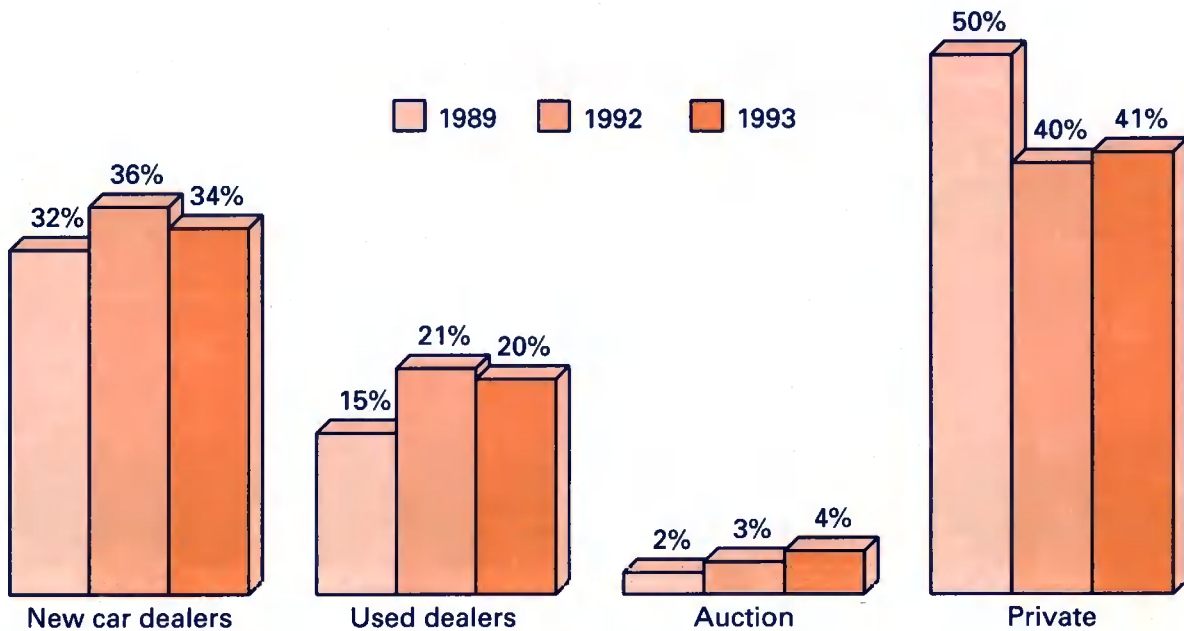
Source: The Henley Centre Planning for Social Change Survey

A key issue for all consumer markets in the 1990s will be service, as a point of brand differentiation and in terms of delivering consumer satisfaction. Research has shown, unsurprisingly, that levels of service demand increase with income. Thus service demands will slowly rise as the economy recovers, but rise significantly for richer people, who are generally the new car owners and who will be seeing substantial rises in their disposable income.

It will become particularly important in the car industry.

Large and well known car manufacturers still command a degree of respect and loyalty in the market (over 70% of respondents in the Lex Report said that they would like to buy from a well known manufacturer) – but only 43% motorists knew exactly which make of car they wanted *before* visiting any dealerships. The crucial point here is that young people in the 17 to 24 age group are more agnostic about the make of car that they want to buy. Only 28% of them are certain of the brand that they want before shopping at the dealerships. In fact, the older the age group, the more sure they seem to be about the make they want; it is people over 55 who seem to have their minds most firmly made up. This provides evidence of the trend towards less brand loyalty in the future and more product and service performance related purchasing.

Source of purchase of used cars



Source: Lex Reports

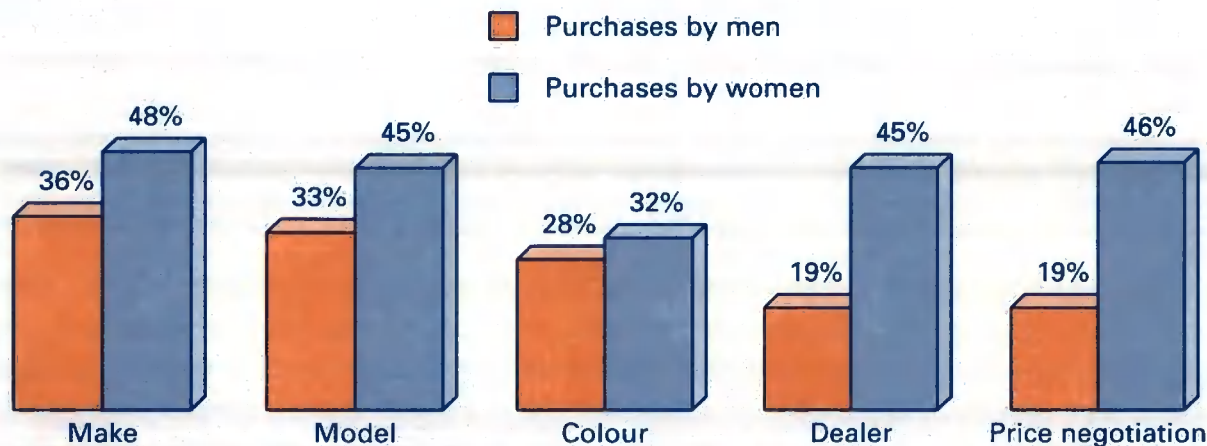
Perhaps this is why, both for car purchase and for car servicing, people are increasingly going to recognised dealers where they get some guarantee of service quality. It can be seen that this declined slightly during this year, but we expect it to reassert itself once the recovery becomes more certain to consumers.

To summarise, the Lex Report illustrates not just the shift in people's buying habits away from image and brand loyalty towards a more pragmatic approach to car purchase, but also emphasises the increasing importance of customer service in selling cars.

THE IMPORTANCE AND NEEDS OF WOMEN DRIVERS

Women's influence on the purchase decision

% where spouse influences the decision



Base: 532

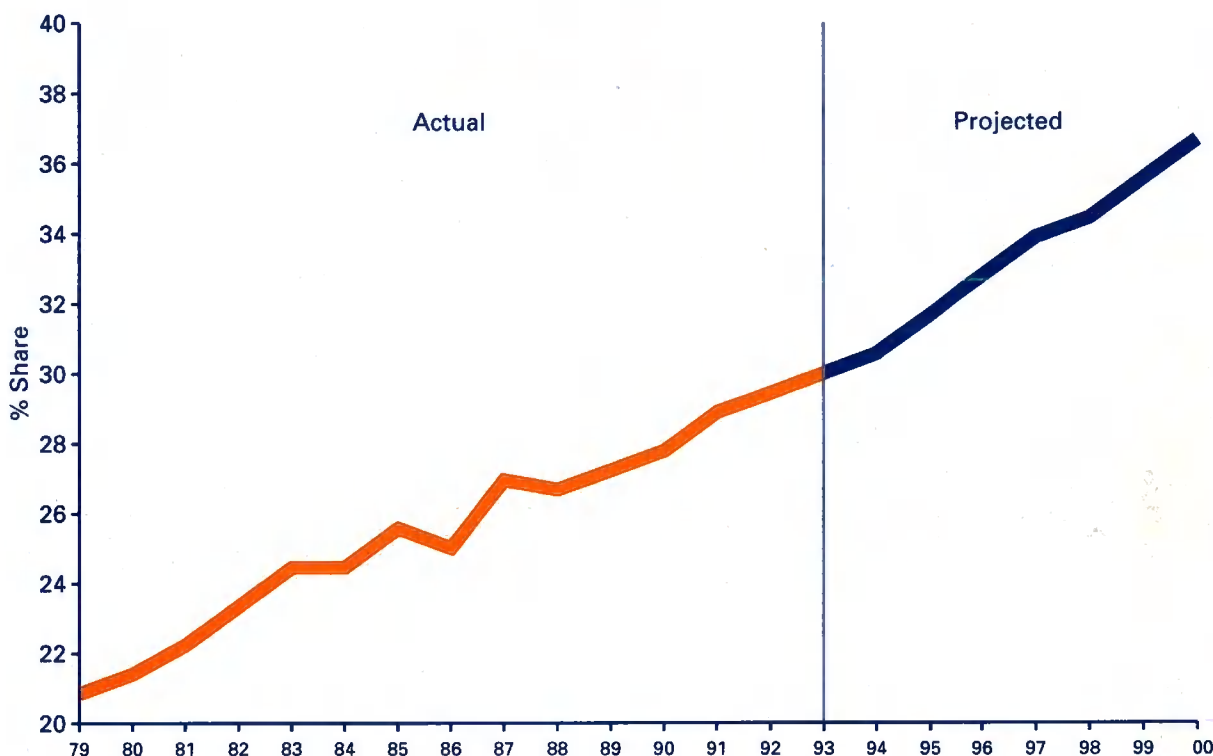
Source: Lex Report on Motoring 1994, The Consumer View/MORI

Between 1975/6 and 1989/90, the number of women with driving licences almost doubled, whilst the number of male drivers grew by less than 30%. Young women are now almost as likely as men to get a driving licence.

It is therefore going to be increasingly important that their needs are assessed and addressed by all those working in the car industry. They will be important not only because they now represent around 40% of all drivers, according to the Lex Report and are influential in the purchase decision, but also because their increasing economic importance and independence make them purchasers of cars in their own right. The Lex Report this year showed that of all new and used cars bought in the last two years, 35% of the purchases were made by women, and, as the chart above shows, many of these purchase decisions were made without the advice of spouses.

The growth in women managers, illustrated in the chart on the following page, shows that they are also likely to be an increasingly important part of the company car market.

Women in UK management



Source: Labour Force Survey/Department of Employment/The Henley Centre

In many ways the needs of women drivers are very similar to men's, but the Lex Report has highlighted a number of key areas where their needs or priorities are significantly different.

- Their level of interest in cars is lower, suggesting a more pragmatic approach to the market.
- They enjoy the process of buying cars less than men
- They are less likely to look at dealer advertising in the local press
- They dread price negotiation more than men
- They are more worried about having an accident in their car than men
- They worry more about driving alone at night and of being attacked or robbed in their car
- They are more worried about breaking down on the motorway

The research shows that their needs in terms of the practicalities of the car are very similar to men's, with the notable exception of personal safety (both in terms of protection from attackers and protection from accidents). It is in their service requirements and in how they are communicated to, however, that they have more significantly different needs to men.



THE MOTORISTS OF THE TWENTY-FIRST CENTURY

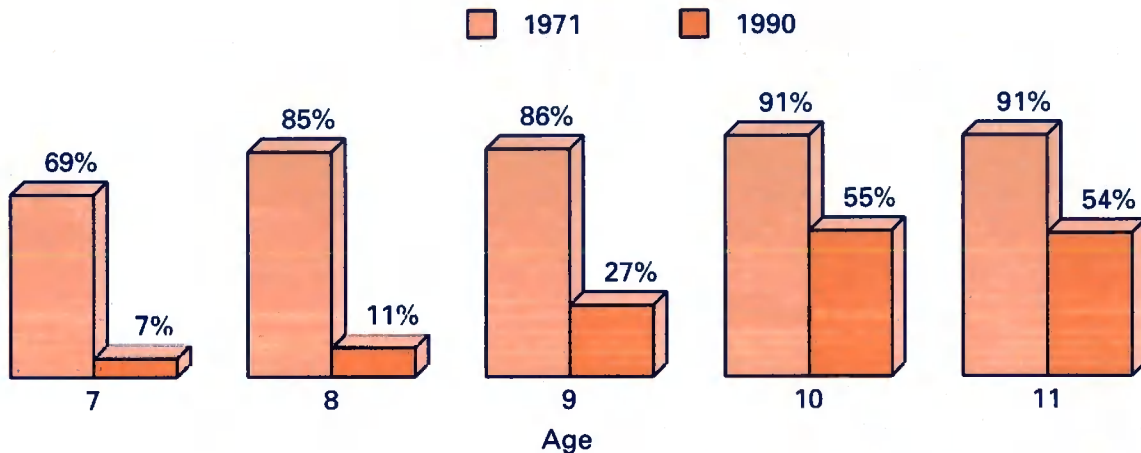
We showed earlier how dependent teenagers are on the car. We also looked, in this year's survey, at the thoughts of tomorrow's motorists on some key aspects of motoring.

Teenagers today are more dependent upon the motor car than were their parents:

- Around 96% of the 13 to 16 year olds interviewed went to school/college, and around one-third of these used the car when making this trip.
- 68% play sports, and 50% of these travel in a car when playing sports.
- 65% of them go to see other events such as films and 68% of them use a car.
- 70% of youngsters go shopping and 60% of these use a car.

Part of the reason behind the increasing use of car by youngsters is the increased availability of cars. The chart on the following page, however, shows that the percentage of young children going to school unaccompanied was significantly lower in 1990 than in 1971. Parents appear to be increasingly concerned about the danger from traffic and of the risk of abuse and this appears to have led to them placing greater restrictions on their children's mobility.

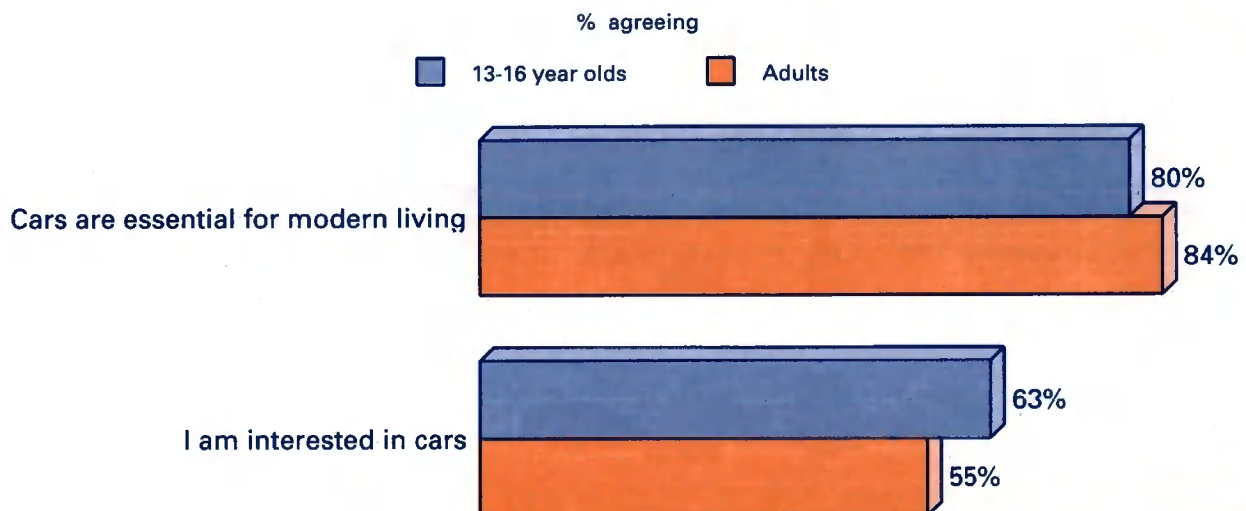
% of children going to school unaccompanied



Source: 'Children, Transport and the Quality of Life' by Mayer Hillman

The present group of youngsters are also one of the first generation for whom the car-borne society has been a reality for all of their lives. It appears almost inconceivable to them that life can be lived without the car.

Interest and reliance on cars

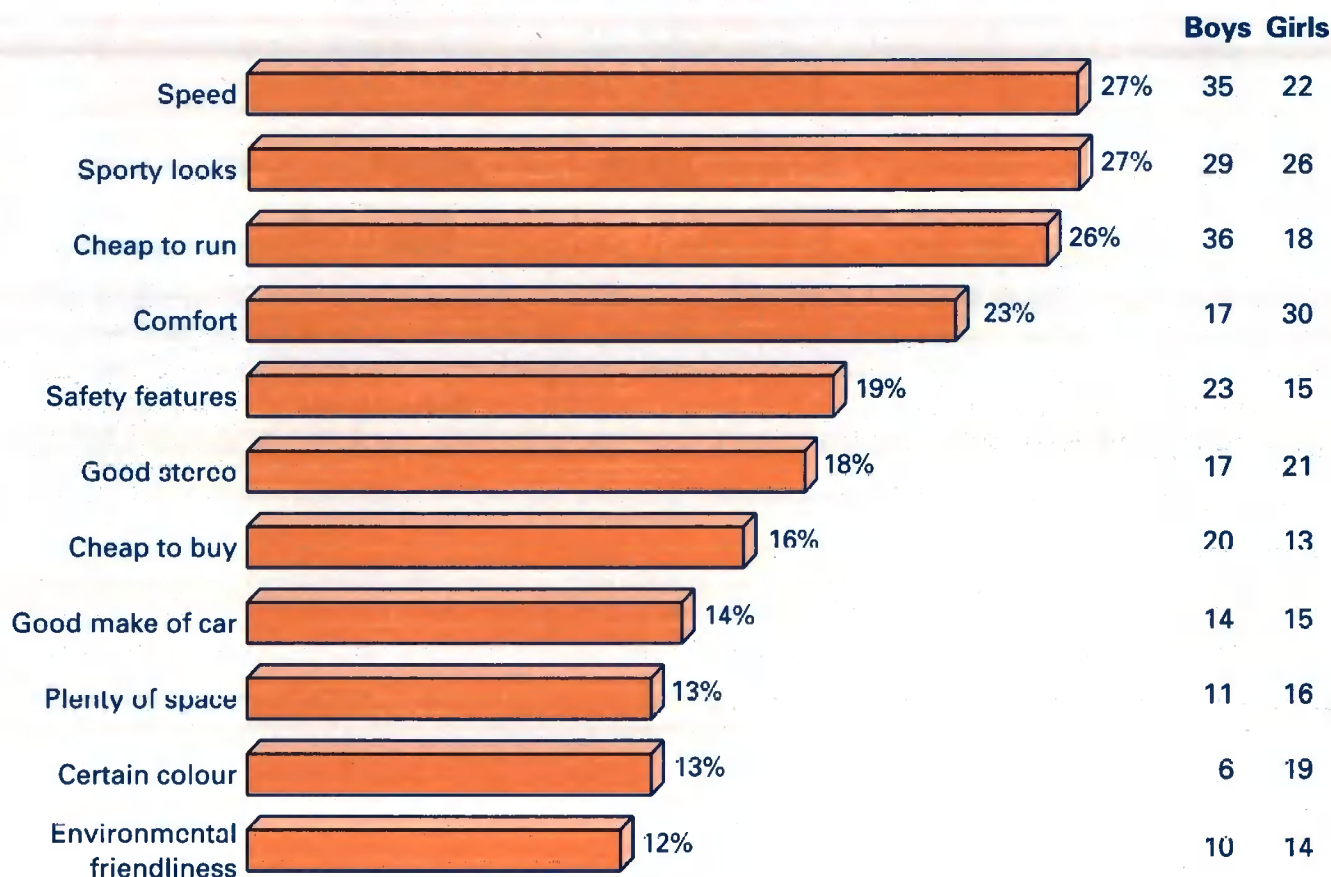


Source: Lex Report on Motoring 1994, The Consumer View/MORI

1994 LEX REPORT ON MOTORING – The Consumer View

Most of this age group agree that cars are essential for modern living, but also have a slightly higher degree of interest in cars than their somewhat more jaded parents. With many cars now very similar in styling, performance and reliability, it will be an important but difficult job for manufacturers to maintain this interest through to the time when they actually become purchasers, especially as the main things they claim they would look for in a car are speed (27%) and sporty looks (27%).

What 13-16 year olds would look for in a car



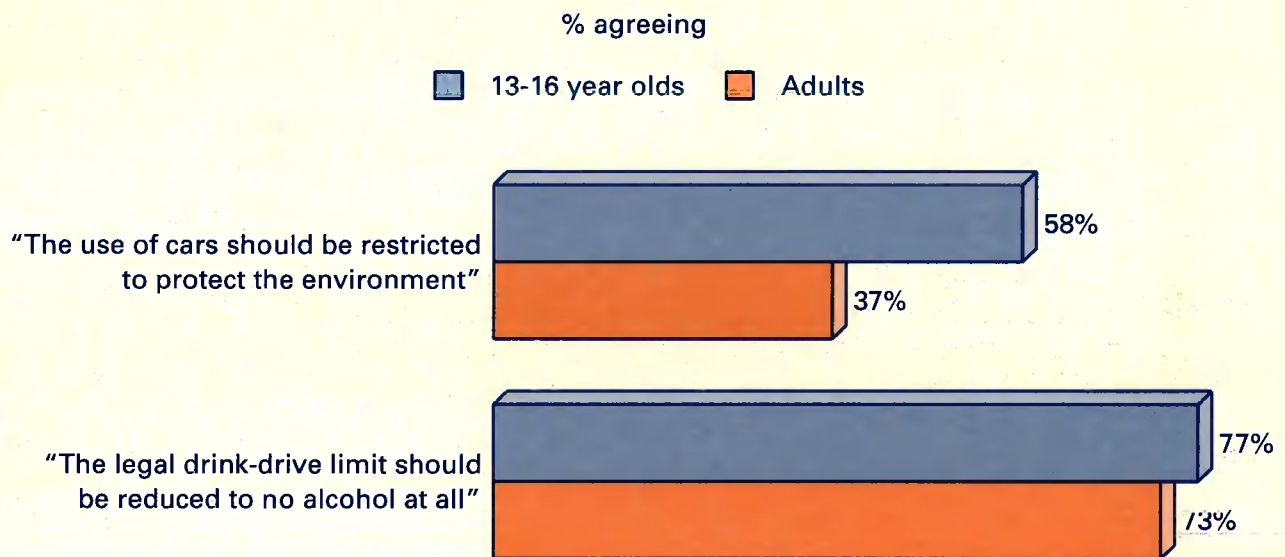
Base: 170

Source: Lex Report on Motoring 1994, The Consumer View/MORI

What is clear though is that they are extremely keen to drive as soon as they are 17. 87% of this age group thought they would learn to drive as soon as they were 17, with over 80% wanting to be taught by a qualified instructor. Not surprisingly, given this enthusiasm to drive, only 20% of 13-16 year olds thought the minimum age for driving should be raised from 17 to 18 years old.

There is strong evidence from this survey, as with other more general surveys that teenagers have a strong regard for the environment (although they don't believe that this is inconsistent with wanting to own a car) and hold strong views on drink-driving.

Concern about the environment and alcohol



Source: Lex Report on Motoring 1994, The Consumer View/MORI

This latter point is borne out by the behaviour of current 17-24 year olds who are not such strong pub goers as previous generations, according to the Henley Centre Time-Use study.



1994 LEX REPORT ON MOTORING – The Consumer View



THE RESEARCH IN DETAIL

CAR OWNERSHIP PATTERNS

CAR OWNERSHIP AND EXPECTATIONS

Those households in Britain with at least one regular driver have 1.54 cars on average – a slight increase since 1992 when the average was 1.51. The proportion of drivers in one car households has barely changed at around 58% along with the proportions of those in two and three or more car households – 33% and 9% respectively. The small increase is accounted for by the net effect of a 1% decline in those with one car in the household and a 1% increase in those with more than three cars. These figures reflect the improved economic conditions and increase in car sales experienced over the last year and suggest a return to the trend of increasing multi-car households.

Drivers are more optimistic about the future than they have been for three years. In two years' time 37% expect to be in two car households and 10% in three or more car households. These figures represent a higher future expectation than has been recorded for three years. On the other hand, only 52% expect to be living in one car households, and 1% do not expect to have a car in two years' time.

Overall the average number of cars per household with a driver is expected to rise to 1.6 by 1995. One in ten drivers expect to see an increase in the number of cars in their household in two years' time, while 6% anticipate a decline; the rest expect no change.

The proportion of respondents who say the number of cars in their household has increased compared with **one year ago** (9%) is exactly matched by those who say it has decreased. However, those claiming an increase in number of cars in the household compared with **two years ago** is somewhat higher (15%) than those claiming a decrease (11%). There is a difficulty of making these figures consistent with our measures of cars per household two years ago because we exclude from the sample people who currently have no cars in the household, so our sample this time would exclude drivers of two years ago who no longer have a car and include drivers now who had no car in 1992.

Hence, if car ownership remained static we would expect the number of respondents claiming an increase in the number of cars in their household always to be greater than the number who claimed a decline.

Cars in Household Now

Base:	One (953)	Two (607)	Three (106)	Four+ (48)
Expected Number of Cars in 2 years' time:	%	%	%	%
None	2	*	0	0
One	79	9	5	0
Two	14	80	24	13
Three	*	8	49	27
Four+	0	1	19	51
Don't know	4	2	3	9
Mean	1.1	2.0	2.9	3.6

Grossed up Estimates

The six Lex Reports on Motoring, based on surveys late in each year 1988 to 1993*, provide a series of estimates for actual car ownership and expectations. Over the three years from 1988 to 1990 actual ownership rose from 21.0 million to 23.2 million. In 1991 there was a very slight drop to 23.0 million. The number of cars then increased in 1992 to 23.3 million as a result of an increase in the estimated number of households in Great Britain and an increase in the proportion with a car although average number of cars per household actually fell slightly. By 1993 the number of cars had risen to 23.9 million, the highest number recorded in any of the Lex Reports.

Drivers remain optimistic in their expectations for future ownership. They expect to increase the number of cars in their household from an average 1.54 now to 1.60 in two years' time. This expectation reverses the decline of the last two years' surveys. The peak was in 1989 with an expectation of 1.67 cars per household in 1991.

Expected Increase in Car Ownership in Two Years' time

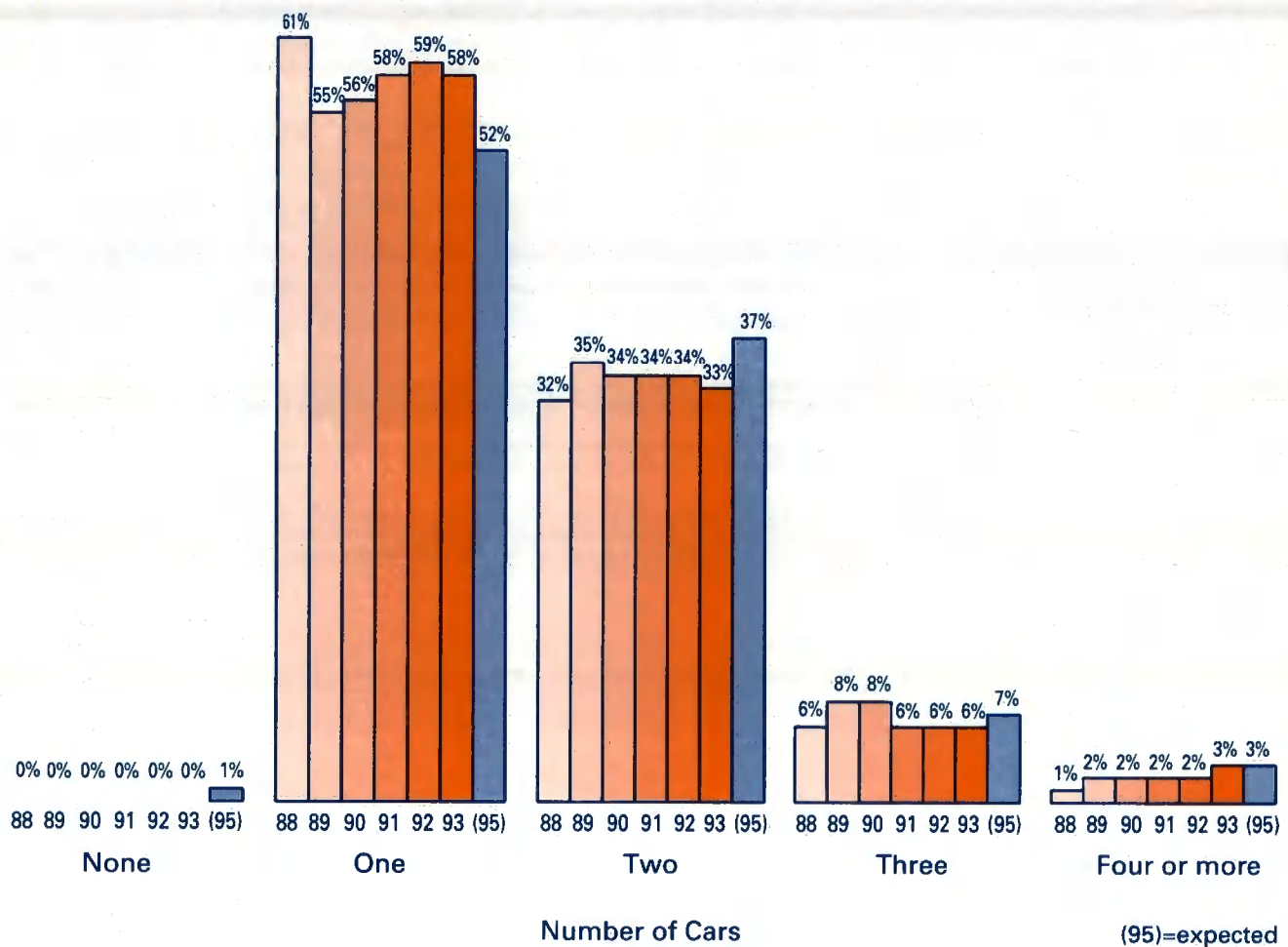
Survey in	1988	1989	1990	1991	1992	1993
	2.3 million	2.5 million	1.9 million	1.7 million	1.0 million	1.4 million

*Trend figures have been revised since last year's Lex Report on Motoring in line with revisions in the DoE and OPCS's figures of households in Great Britain and proportion of households with a car.

Car Ownership and Expectations

Q How many cars are there in your household now?

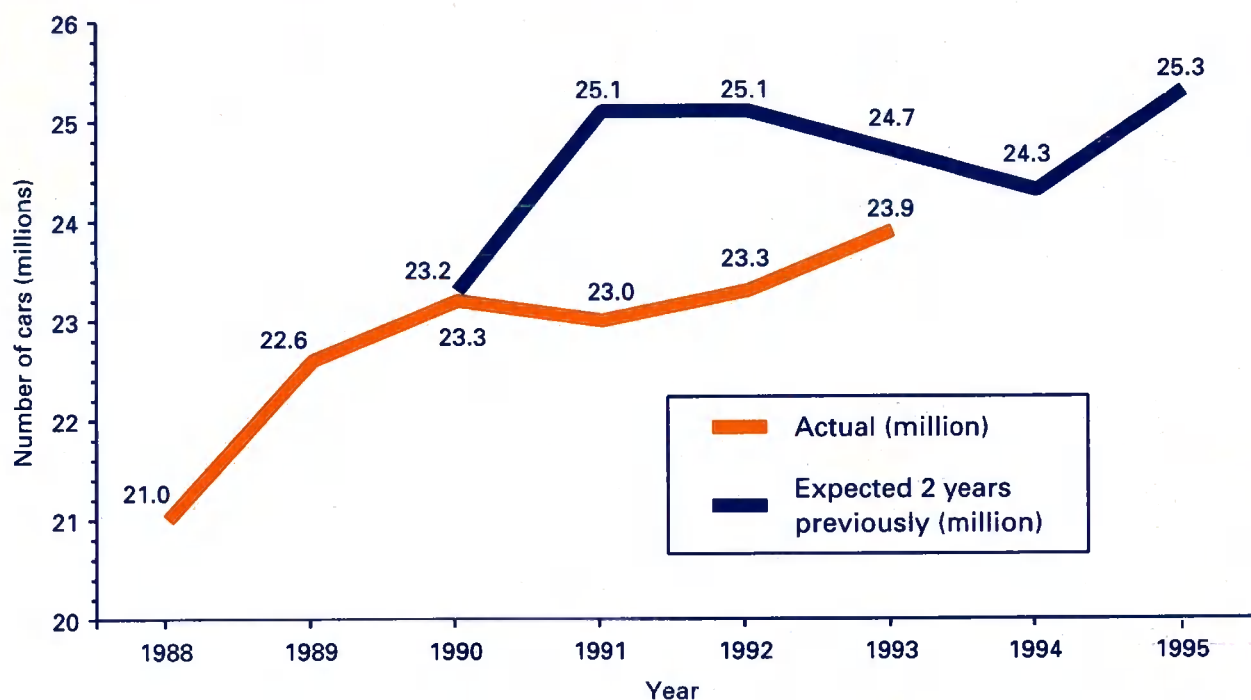
Q How many cars do you expect there to be in your household in two years' time?



Base: All drivers

Source: Lex Report on Motoring 1994, The Consumer View/MORI

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



			Year of survey													
H/hs in GB (DoE) m		H/hs with cars (OPCS) %	Ave. Cars per h/h (MORI)	Grossed up m	1988 Cars per h/h m		1989 Cars per h/h m		1990 Cars per h/h m		1991 Cars per h/h m		1992 Cars per h/h m		1993 Cars per h/h m	
1988	21.5	66	1.48	21.0												
1989	21.7	66	1.58	22.6												
1990	21.9	67	1.58	23.2	1.59	23.3										
1991	22.1	68	1.53	23.0			1.67	25.1								
1992	22.5	68.5	1.51	23.3					1.63	25.1						
1993	22.7 e	68.5 e	1.54	23.9							1.59	24.7				
1994	22.9 e	68.5 e											1.55	24.3		
1995	23.1 e	68.5 e													1.60	25.3

e = estimated

Source: Lex Report on Motoring 1994, The Consumer View/MORI

REASONS FOR INCREASING/DECREASING CAR OWNERSHIP

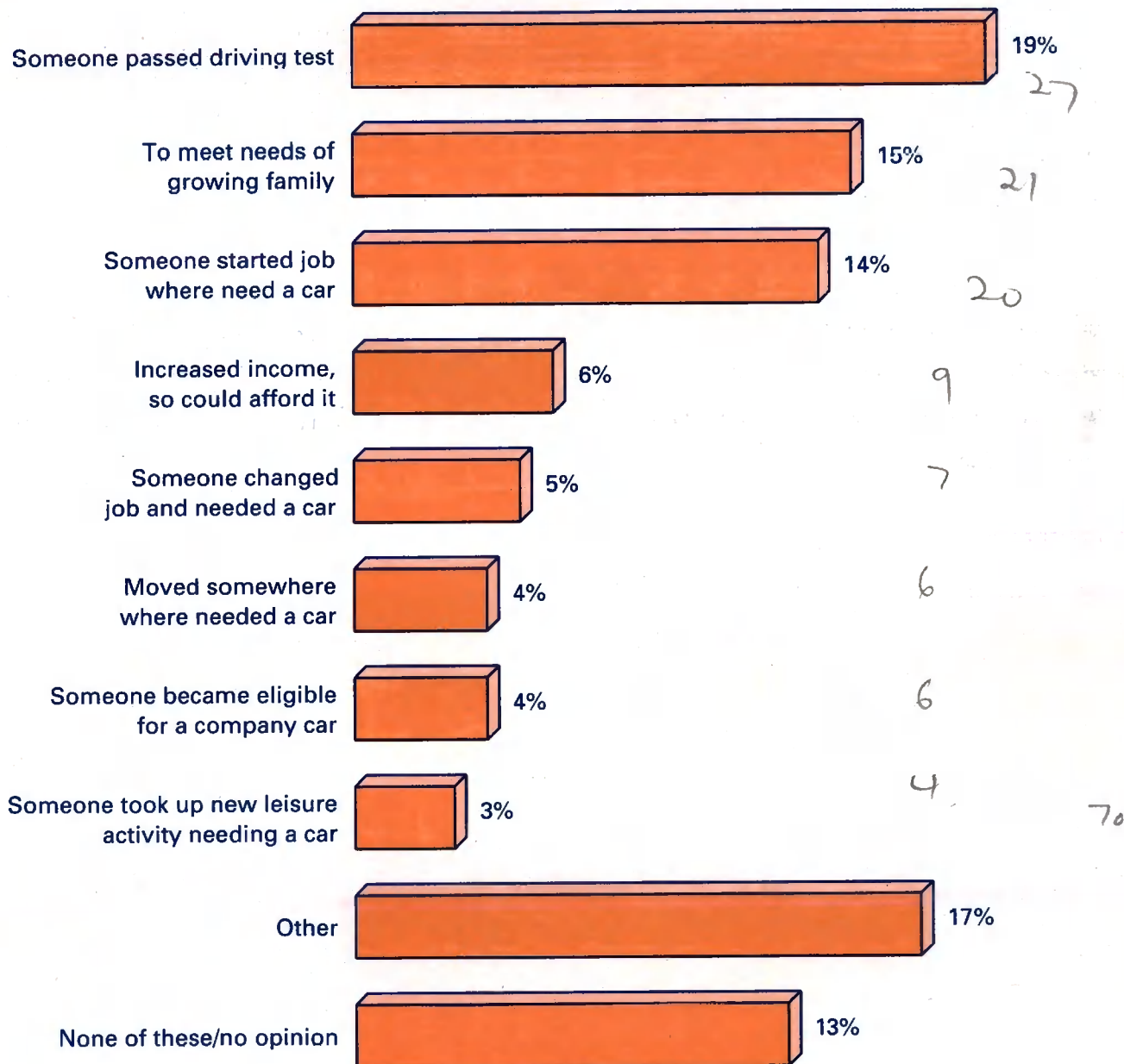
The main trigger for getting an additional car is someone in the household passing their driving test and wanting a car. This reason is given by one in five (19%) of those claiming an increase in car ownership in the past year. It is particularly important for those households with three or more adults (28%).

Next most important, was to meet the needs of a growing family (15%) or someone having started a job where they need a car (14%). Other specific reasons were given by 6% or fewer. These reasons given followed a similar pattern to last year.

The main reasons given for decreasing the number of cars in the household was someone moving out. One in three of those who had fewer cars in their household than a year ago gave this as the reason. Other relatively frequent answers were the cost of motoring (13%), reduced household income (10%) and no need or not enough use being made of the car (9%). These findings were also very much in line with last years' findings.

Reasons for Increasing Car Ownership

Q Which, if any, of these events was the main reason for your increasing the number of cars in the household where you live?

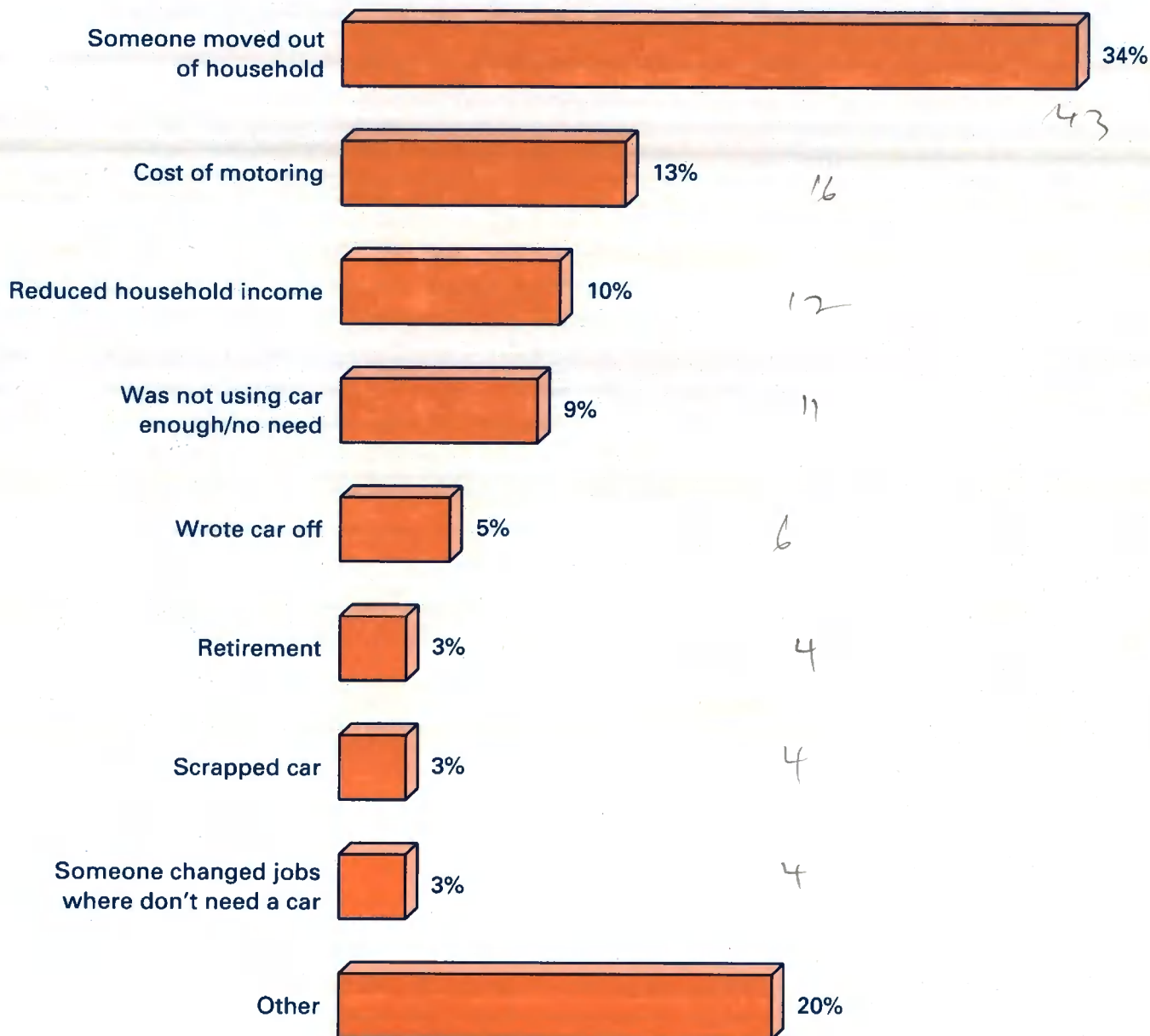


Base: All who have more cars in their household than one year ago (162)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Reasons for Decreasing Car Ownership

Q Which, if any, of these events was the main reason for your decreasing the number of cars in the household where you live?



Base: All who have fewer cars in household than one year ago and answered question (120)

Note: Reasons only shown if nominated by at least 3% as reason

Source: Lex Report on Motoring 1994, The Consumer View/MORI



NEXT CAR PURCHASE

Of total cars bought new, 73% are expected to be replaced by new cars, 13% by used cars and 7% are not expected to be replaced at all. The remaining drivers have no opinion. Of cars bought used, 80% are expected to be replaced by used cars, 8% by new cars, although 6% will not be replaced at all. Clearly this will be offset to some extent by new buyers entering the market for the first time who are likely to be younger drivers with a preference for used cars. In both cases the ratio of expected new and used replacement cars are almost identical to the last survey. The propensity to buy a new car is significantly higher among those aged 35 to 64 (around 31%) than those aged under 35 (24%) and those aged over 65 (26%). This latter group has a particularly high propensity to say they will not buy another car – 27%.

As one might expect, company car drivers and those driving over 20,000 miles per year were considerably more likely to intend replacing a new car with a new car.

	Current Car	
	Bought new (868) %	Bought used (1,728) %
Next car will be bought . . .		
New	73	8
Used	13	80
Will not be replaced	6	6
No opinion	8	6
	Next Car	
	Will buy new (812) %	Will buy used (1,490) %
Current car was bought . . .		
New	79	7
Used	20	93
No opinion	1	*

Base: All cars (2,611)

LENGTH OF CAR OWNERSHIP

Drivers expect to keep their cars an average of 4.2 years which is much the same as last year and is further evidence that the recession is coming to an end for the motor industry. However, the figure remains higher than any previous year apart from 1992 which suggests the recovery could be slow. Surprisingly the average expected length of ownership for company cars has increased slightly to three years from 2.8 years in 1992 although private car buyers now expect to keep their cars an average of 4.3 years compared with 4.4 in 1992.

Drivers of new cars expect to keep their cars a slightly shorter time than last year at 4.2 years although drivers of used cars expect to keep them for a slightly longer period of time than last year – also 4.2 years.

Over the past four years, the expected length of ownership of cars bought new has extended by just under one year, equivalent to a 31% drop in demand for new cars.

The expected length of ownership of used cars increased by around six months over the past four years which would represent a 17% decline in the market since 1989.

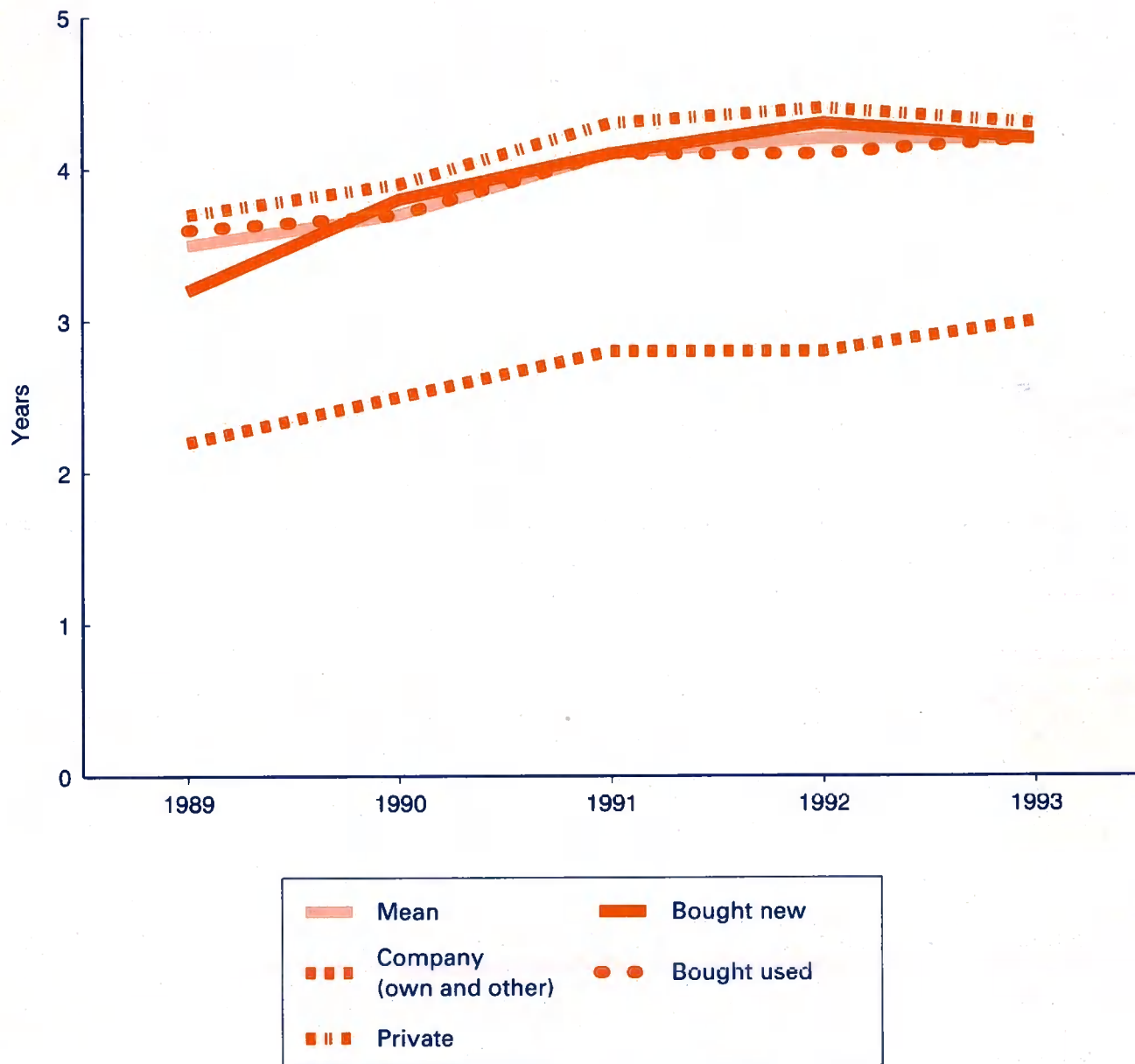
Length of Car Ownership

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

Years	89	90	91	92	93
All	3.5	3.7	4.1	4.2	4.2
Company (own and other)	2.2	2.5	2.8	2.8	3.0
Private	3.7	3.9	4.3	4.4	4.3
Bought new	3.2	3.8	4.1	4.3	4.2
Bought used	3.6	3.7	4.1	4.1	4.2

Base: All drivers (1,720)

Length of Car Ownership



Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

ANNUAL MILEAGE

On average, Britain's drivers estimate that the car they drive most often is driven 10,600 miles a year. Although the survey figures are based on respondents' estimates and cannot be taken as totally accurate, they are fairly consistent with the Department of Transport's estimates for 1992 for cars and taxis of 10,000 miles.

A quarter (27%) of drivers estimate they drive only 6,000 miles a year or less, while two in five (40%) reckon they drive between six and 12,000 miles a year.

The greatest number of miles are travelled by men (12,100 miles) and company car drivers (20,600).

Of the 10,600 miles the average driver reckons the car they drive most often is driven in a year 3,300 miles are estimated to be driven in connection with the driver's or someone else's work (excluding driving to or from work). Male drivers reckon the cars they drive most are driven an average 4,400 miles in connection with work out of a total average of 12,100 miles, while female drivers reckon their cars are driven an average of just 1,700 miles in connection with work out of a total of 8,500 miles. By age, driving in connection with work is highest, as one might expect, for those aged 25-54 – around 3,900 miles.

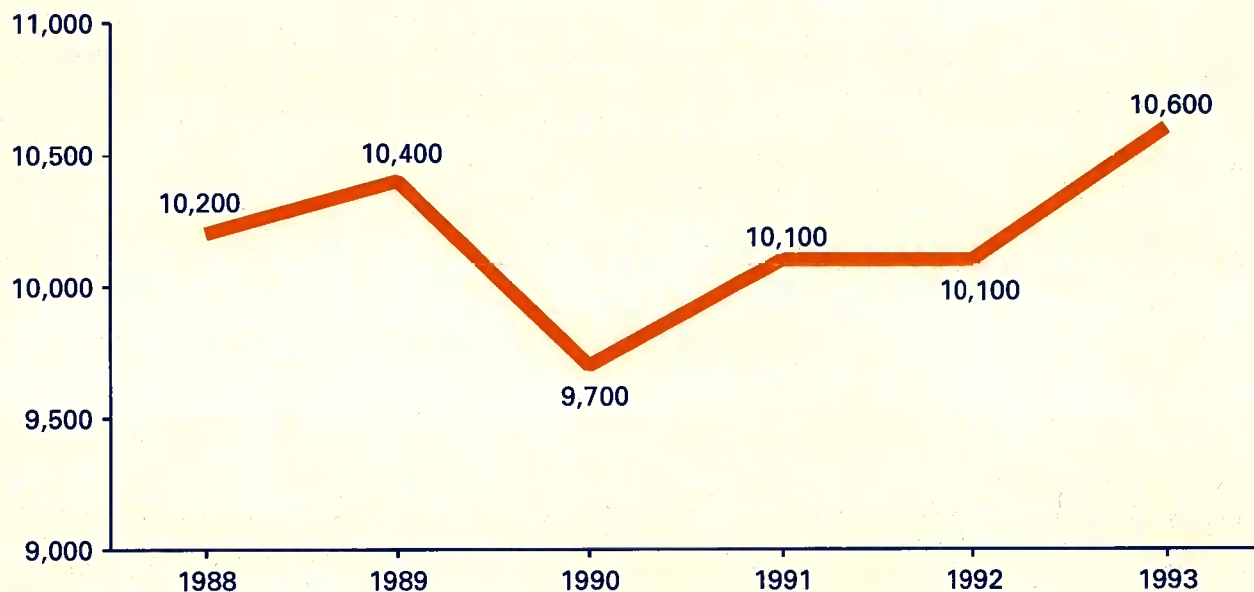
Company car drivers reckon that an average 12,700 out of the 20,600 miles their cars are driven each year are driven in connection with work, although owners of private cars also reckon that 2,000 of their average 9,500 are driven in connection with work. Indeed, one in three company car drivers (32%) consider their cars are driven over 18,000 miles a year in connection with work and the proportion who reckon their cars are driven less than 2,000 miles with work at all has declined from 18% two years ago to just 8% now.

Those who do any work related driving say the car they drive most often is driven on average 7,800 miles per year on business. Private cars used for work (approximately 31% of all private cars) average around 5,600 miles.

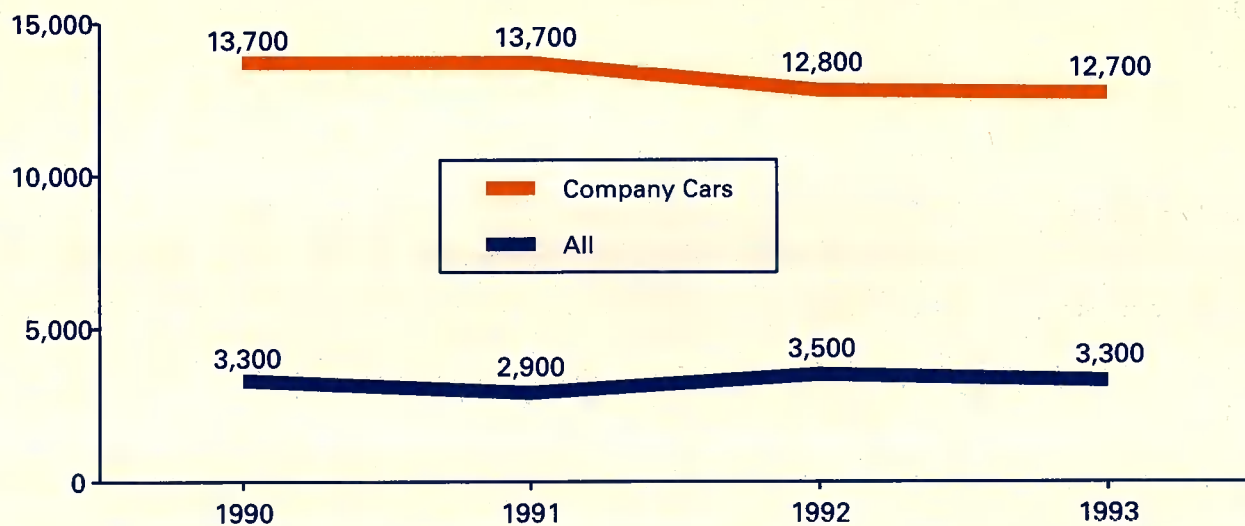


1994 LEX REPORT ON MOTORING – The Consumer View

Average Miles Driven – Trends



Average miles driven in connection with work – Trends



Base: All drivers

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Use of Car for Work

Q Approximately how many miles is the car 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 (not including driving to or from work)?



Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI



CAR PURCHASING

CAR BUYERS

Forty-seven per cent of drivers (or 11,700,000 people) have bought a car in the last two years with the balance between new and used cars at 25% new and 75% used. Assuming motorists' recall is reasonably accurate (although accurate recall of date of purchase can be somewhat variable) and assuming each person bought only one car in that period, these figures would gross up to around 5.9 million cars bought per year, consisting of 1.5 million new cars and 4.4 million used. This would, of course, exclude cars where the company, rather than the employee, took the responsibility for buying the company car.

Men are more likely to have bought cars than women – 54% compared with 38% – although they are roughly equally likely to have bought new cars (25% and 23% respectively).

Car purchases also tend to be related with age with young drivers – those aged 17-24 being most likely to have bought a car in the last two years (58%), declining to around 45% of those aged 25-64 and 31% of those aged 65 or over. However, older people are much more likely to have bought new cars than young drivers. While two-fifths (39%) of car buyers aged 55+ have bought new, this declines to 8% of 17-24 year old buyers.

Three out of ten (30%) new car buyers in the last two years were aged 55 and over, rather more (45%) were aged 35 to 54 and around a quarter were aged under 35. The picture is very different for used cars, where 15% of purchasers are aged 55 and over, 37% are aged 35 to 54 and 48% are aged under 35.

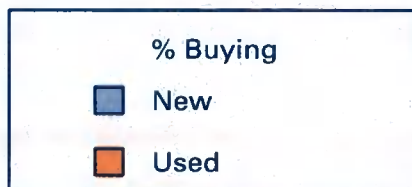
New/Used Split – Trends

	1989 %	1990 %	1991 %	1992 %	1993 %
Bought car in last two years	44	45	45	44	47
Base: All drivers					
Proportion buying:					
New	30	28	24	22	25
Used	70	72	76	78	75

Base: All bought car in last two years

Car Purchasing

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



**Per cent
bought car in
last two years**

All 25% 75% **47**

Sex

Male 25% 75% **54**

Female 23% 77% **38**

Age

17-24 8% 92% **58**

25-34 17% 83% **51**

35-54 29% 71% **48**

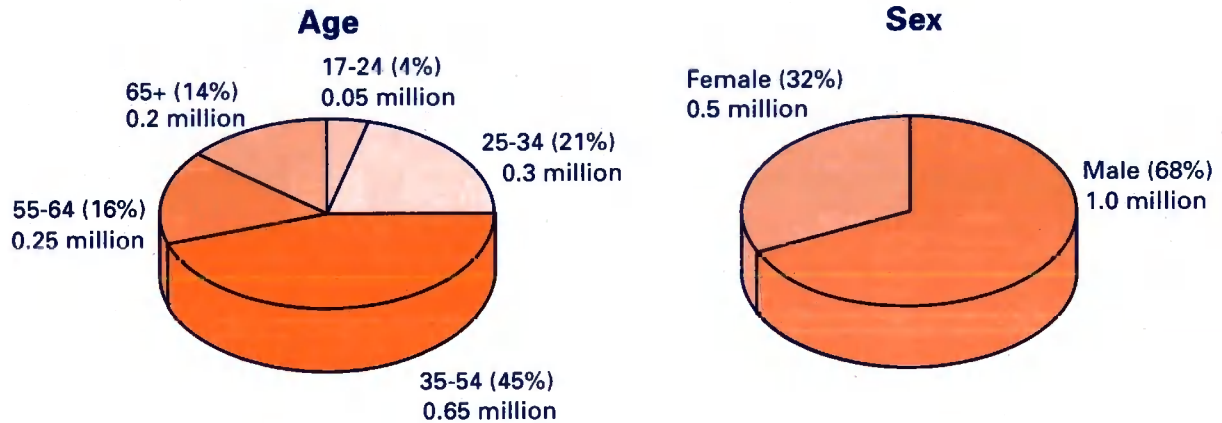
55-64 33% 67% **45**

65+ 50% 50% **31**

Base: All drivers (1,720)

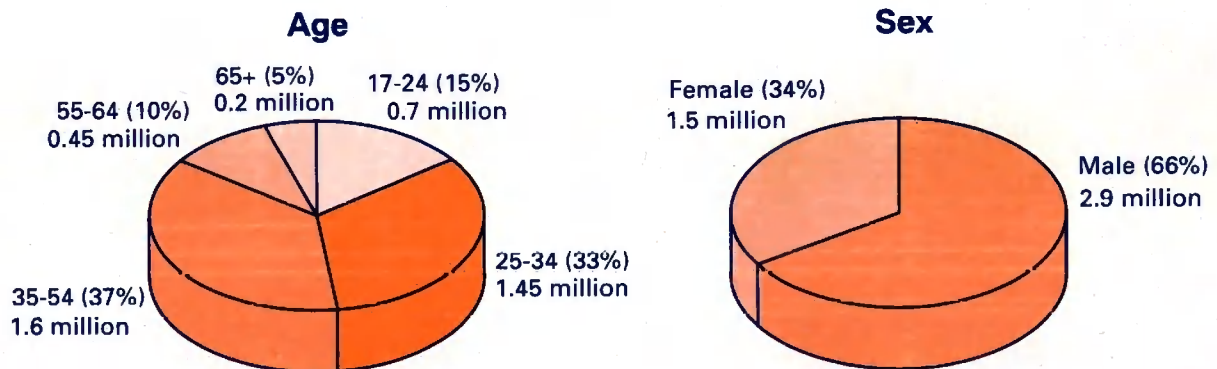
Source: Lex Report on Motoring 1994, The Consumer View/MORI

Profile of New Car Buyers



Base: All bought new car in last two years (204). Average 1992/1993

Profile of Used Car Buyers



Base: All bought used car in last two years (594). Average 1992/1993

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SOURCE OF PURCHASE

Four out of five (82%) new car purchasers bought their car from a franchise dealer selling only their own make of car, while 15% bought from a dealer selling more than one make. This represents a significant reversal of the trend away from single franchise dealers recorded last year.

One in four used car purchases were private deals with a stranger (25%) and slightly fewer (21%) were from a used car dealer. Friends or relatives accounted for another 16%. Franchise dealers account for 23% (three in four of these – 17% – were at a franchise dealer for the same make of car), while non-franchise dealers selling used cars account for 10%. These figures suggest a slight switch back to private deals in the last year and away from trade.

Assuming reasonably accurate recall of date of purchase and that purchases were equally divided between the two previous years and that only one purchase was made by each individual who purchased a car in the last two years, then this suggests the total number of cars bought last year of 5.9 million. 1.5 million were new cars bought from a franchise dealer and around one million were used cars from a franchise dealer. Used car dealers accounted for 0.9 million and private deals with strangers 1.1 million.

Half the used purchases from private individuals were for £1,000 or less as were 40% of purchases from a friend or relative. By contrast, 84% of purchases from a franchise dealer were for over £3,000. Half (53%) of used car dealer sales were also for over £3,000.

Those who have older used cars are markedly more likely to have bought via a private deal (39%) and a little more likely to have bought from a used car dealer (24%) or a friend or relative (25%). Indeed, 69% of private deals have been for cars which, at the time of interview, were over six years old compared with 44% of all used cars. Used cars aged up to three years old are highly likely to have been bought from a franchise dealer for that make of car (42%); some 51% of used cars bought from franchise dealers for a particular make of car were three years old or less at the time of interview.



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Source of Purchase

New Cars

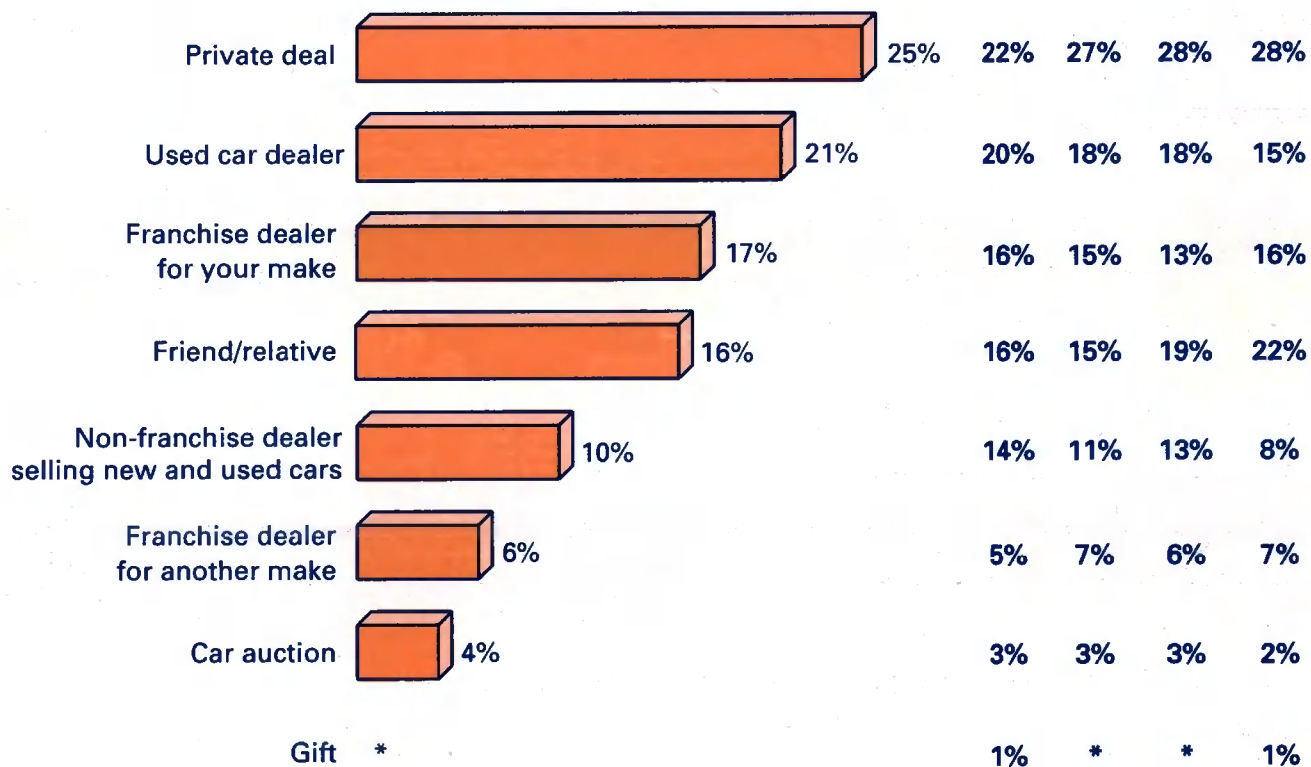
Q Which of these did you buy your car from?



Base: Bought new car in last two years (204)
Don't knows excluded

Used Cars

Q Which of these did you buy your car from?



Base: Bought used car in last two years (649)
Don't knows, unspecified, excluded

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Source of Purchase

Grossed up Figures

	Annual Average Over Last two years
Total cars bought	5.9m
New Cars	
Q Which of these did you buy car from?	
Franchise dealer selling only your make	1.3m
Franchise dealer selling more than one make	0.2m
	<u>1.5m</u>
Used Cars	
Q Which of these did you buy your car from?	
Private deal	1.1m
Used car dealer	0.9m
Franchise dealer for your make	0.8m
Friend/relative	0.7m
Non-franchise dealer selling new and used cars	0.4m
Franchise dealer for another make	0.3m
Car auction	0.2m
Gift	*m
	<u>4.4m</u>
(Any franchise)	(1.0m)

NB This excludes cars bought directly by companies for their employees (0.3m new cars).
Difference in completed total due to computer rounding.

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Source of Purchase – used cars by age of car

Base	All (594) %	Up to 3 years (140) %	3-6 years (203) %	Over 6 years (245) %
Private deal	25	6 (5)	15 (21)	39 (70)
Used car dealer	20	13 (13)	25 (43)	20 (44)
Friend/relative	16	4 (5)	13 (27)	25 (69)
Franchise dealer for your make	16	42 (51)	21 (44)	5 (6)
Non-franchise dealer selling new and used cars	10	19 (37)	12 (40)	5 (24)
Franchise dealer for another make	6	8 (24)	9 (50)	3 (24)
Car auction	4	4 (23)	3 (27)	4 (50)
Gift	*	0 (5)	0 (38)	* (0)

Figures in brackets row percentage

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SOURCE OF FINANCE

Around half (45%) of those who have bought a car in the last two years have paid cash although this tended to be slightly higher among those who bought their car used (49%). It was only slightly lower than average for company cars (41%).

Finance company loans were the second most common form of finance – 16% – and particularly favoured by those who bought their new or used car from a franchise dealer for their make of car. Overall, though, this form of finance was preferred less this year than last. Bank loans were used by 11% and hire purchase by 10%.

	All				Bought new				Bought used			
	'90	'91	'92	'93	'90	'91	'92	'93	'90	'91	'92	'93
Cash/loans from family	44	45	47	45	47	42	42	39	46	46	51	49
Finance Co loan/(+ cash)	15	16	19	16	20	16	24	19	11	15	17	14
Bank loan (+ cash)	12	15	12	11	8	12	9	11	15	18	14	11
Hire purchase/(+ cash)	11	11	7	10	15	15	10	11	7	8	5	10
Contract hire/full service leasing	1	2	2	3	2	3	3	6	0	*	1	1
Building Society loan/(+ cash)	1	3	3	2	2	0	1	1	1	5	3	2
Finance leasing	3	1	2	2	5	2	3	5	1	1	1	*
Other	3	3	4	4	3	4	7	5	2	3	3	3
Don't know/refused	10	4	4	7	2	6	1	3	17	4	5	10

Around one in six new car buyers (16%) arranged credit through the dealer using the dealer's plan and a similar proportion used the manufacturer's plan. The dealer's financing plan was also used by 16% of used car buyers, whereas the manufacturer's plan was only used by 6% of used car buyers.

Around three in ten car buyers (both new and used) purchased an extended warranty or mechanical breakdown insurance.

Source of Finance

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

	Car driven most often			Car bought used		Ownership	
	All	Bought new	Bought used	Franchise dealer	Non-franchise dealer	Private	Company
	(529)	(199)	(330)	(138)	(185)	(423)	(103)
	%	%	%	%	%	%	%
Cash/loans from family	45	39	49	44	54	45	40
Finance co. loan/(+ cash)	16	19	14	19	10	16	12
Bank loan/(+ cash)	11	11	11	8	13	11	10
Hire purchase/(+ cash)	10	11	10	12	7	11	8
Building Society loan/(+ cash)	2	1	2	0	3	2	1
Contract hire/full service leasing	3	6	1	1	1	2	13
Finance leasing	2	5	*	1	*	2	4
Other	4	5	3	5	1	4	6
Don't know/refused	7	3	10	10	10	7	6

Base: All responsible for buying new car or used car at dealer (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI



CAR PURCHASE COST

On average the cars driven most often by respondents cost £5,500. New cars cost on average £9,800, or £13,000 if bought by a company, while used cars cost an average of £3,700.

The average price paid increases with the age of the driver peaking at £6,400 for drivers aged 35-64, although even drivers aged 65+ were driving cars which cost on average of £5,500. Each age group apart from 17-24 year olds claim to have paid more for their cars in this survey than those interviewed a year ago.

These figures would suggest a total market in 1993, allowing for inflation, of around £35 billion for all cars, made up of £18 billion for new cars and £17 billion for used cars.

The average cost of used cars varies considerably by source of purchase, rising to £7,300 if bought at a new car dealer for the make of car bought and falling to £1,800 if bought from a private individual whom the buyer did not previously know.

Car Purchase Cost

	Average Cost	
	1992 £	1993 £
All cars	4,700	5,500
New	9,100	9,800
Used	3,200	3,700
Car bought privately		
New	8,200	8,800
Used	3,100	3,500
Company car households		
New	13,100	13,000
Used	5,900	7,800
Age of driver		
17-24	3,000	3,000
25-34	4,200	4,800
35-54	5,000	6,400
55-64	5,700	6,400
65+	5,300	5,500
Source of Purchase		
Used car		
- private individual, did not know		1,800
- friend/relative		1,900
- dealer, only used cars		3,600
- new car dealer, your make		7,300
- new car dealer, another make		4,600
- non-franchise dealer, new and used		5,300
- auction		3,000

DEALERS VISITED AND BOUGHT FROM

New car buyers visited an average of between three and four dealers (3.6) when looking for the car they eventually bought, of which two were for the same make of car they eventually bought. Half of those who bought a new car only visited dealers of the same make as the car bought, and one-third only visited the one dealer where they bought the car. A quarter of new car buyers only visited their chosen dealership once, although the average was just over twice (2.2). Few, however, needed to visit more than three times.

Buyers of used cars are rather more likely to shop around. On average they are likely to visit around five (4.8) dealers, the majority of these dealers for the same make as the one they eventually bought. Used car buyers are highly likely to visit a relatively large number of dealers before buying with 43% choosing to visit five or more. However, the number of times they visited the dealer where they eventually bought the car differed little between new and used car buyers at around 2.2.

One in ten buyers of new cars say there is no dealer for the make of car they eventually bought within a convenient distance of where they either work or live; over half (55%), however, say they have a choice of at least two such dealers, the rest saying there is only one (27%) or not knowing at all (9%). The average was 2.1.

Used car buyers, understandably, felt better served although one in ten also said there were no dealers within a convenient distance of home or work. As with new car buyers just over half (55%) said there were at least two dealers conveniently located, although the mean was rather higher at 3.0.

New and used car buyers are fairly consistent in the distance the dealership where they bought their cars are from their home and work. In each case the average was around 14 miles from home although the new car source of purchase tended to be slightly further from the place of work (22 miles) than used cars purchases (17.5 miles) although in both cases the 'don't knows' were high suggesting that the proximity to home is the more relevant.

Around two-thirds (64%) of new car buyers and two in five (39%) used car buyers in the last two years say they bought their car from the closest or most conveniently located dealership that offers the make of car they purchased.

Dealers Visited and Bought From – New Car Buyers

Q How many dealerships selling . . .

- a) the same make as your car did you visit while looking for a new car, including the one where you bought it?
- b) makes other than your car did you visit?
- c) the same make as your car are within a convenient distance from home/work.

Q How many times did you visit the dealership where you purchased the car whilst shopping for the car you eventually bought?

Q Approximately how many miles is the dealership where you bought your car from

- a) your home
- b) your work (if applicable)?

Number of Dealers visited	Dealer visited			Visits to dealer where bought Car	Dealer of make within convenient distance of home/work
	Same make %	Other makes %	Total %		
None	-	46	-	-	10
One	53	13	31	26	27
Two	15	13	14	39	24
Three	16	7	10	24	16
Four	7	6	13	6	7
Five or more	6	11	30	2	7
Don't know/NA	3	4	2	3	9
Average	2.0	1.7	3.7	2.2	2.1

Distance of dealership where bought car

	Home %	Work %
0-5 miles	52	28
6-10 miles	23	12
over 10	23	24
Don't know	32	36
Average miles	13.8	22.2

Base: All bought new or used car from dealer in last two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Dealers Visited and Bought from – Used Car Buyers

Q How many dealerships selling . . .

- a) the same make as your car did you visit while looking for a new car, including the one where you bought it?
- b) makes other than your car did you visit?
- c) the same make as your car are within a convenient distance from here?

Q How many times did you visit the dealership where you purchased the car whilst looking for the car you eventually bought?

Q Approximately how many miles in the dealership where you bought your car from

- a) your home
- b) your work (if applicable)

Number of Dealers visited	Dealers visited			Visits to dealer where Bought	Dealer of make within convenient distance of home/work
	Same make %	Other makes %	Total %		
None	-	39	-	-	10
One	39	11	25	29	19
Two	13	11	13	39	18
Three	15	9	9	21	15
Four	7	6	6	6	6
Five or more	19	20	43	3	16
Don't know/NA	6	4	4	2	16
Average	2.7	2.5	4.8	2.2	3.0

Distance of dealership where bought car

	Home %	Work %
0-5 miles	50	28
6-10 miles	21	15
over 10	26	27
Don't know	3	30
Average miles	13.8	17.5

Base: All bought new or used car from dealer in first two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

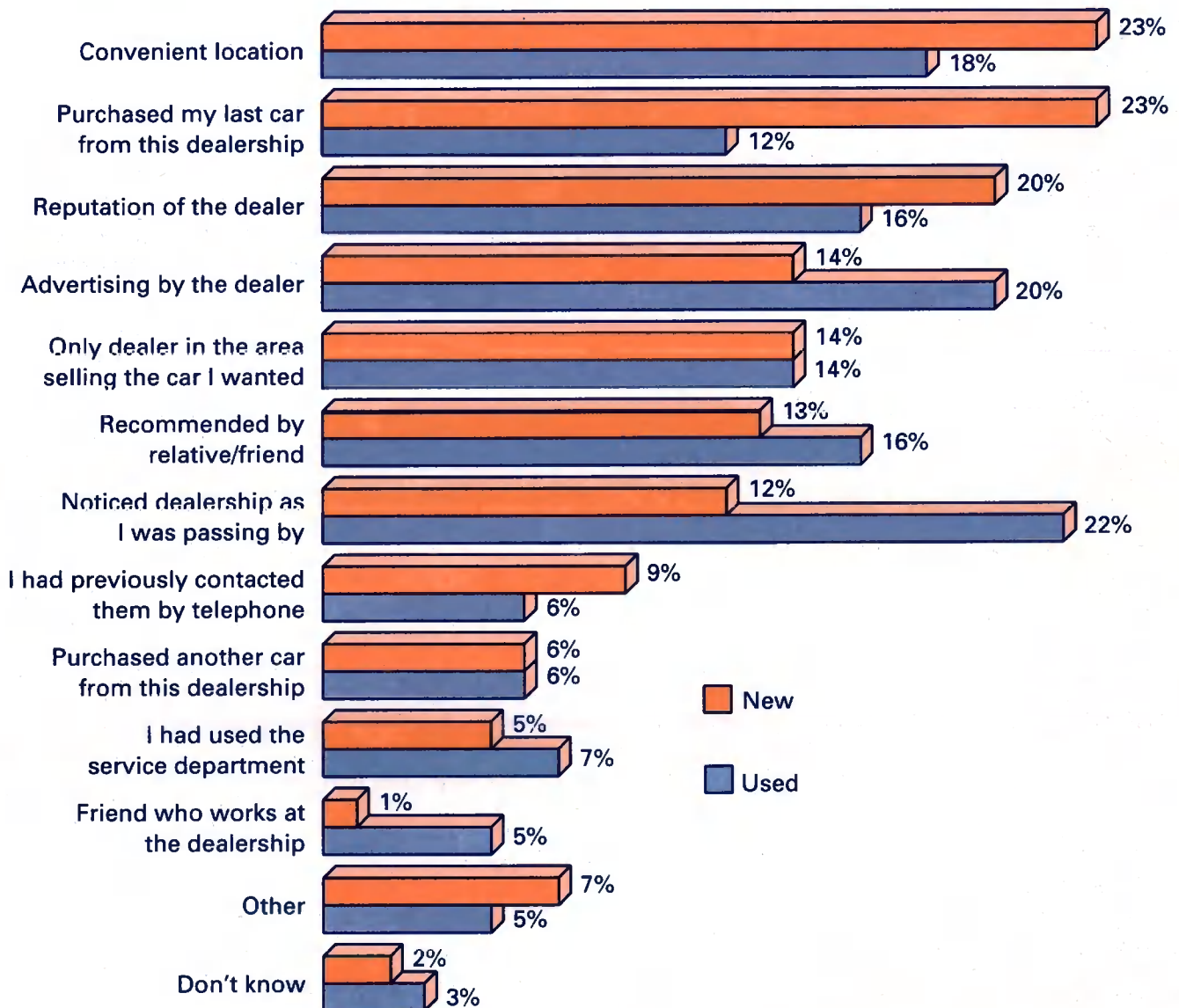


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REASONS FOR FIRST VISITING DEALERSHIPS

The most common reasons for first visiting the dealership where the car was actually bought are, for new car buyers, a convenient location (23%) and purchasing a previous car there (also 23%). For used car buyers, the most common reasons are noticing the dealership when passing by (22%) and advertising by the dealer (20%) as well as a convenient location (18%).

Q Which, if any, of these were reasons for *first visiting* the dealership where you actually bought the car? Any others?



Base: All who bought their car from a dealer in last two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SHOPPING FOR A CAR

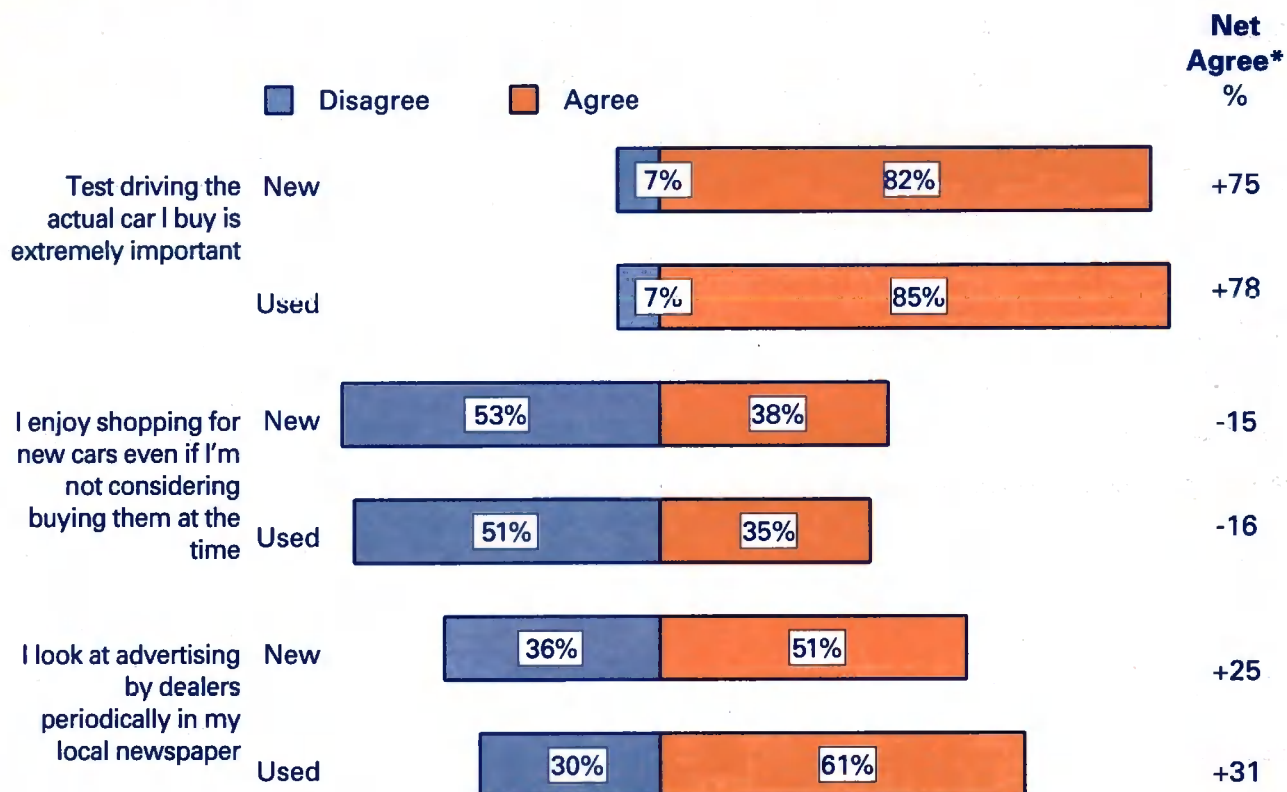
Test driving the actual car to be bought is extremely important to the vast majority (84%) of car buyers, while only 7% disagree. This does not vary much between new and used car buyers, nor between buyers of different sex, age or region.

Over a third of car buyers (mainly men) enjoy shopping for new cars even if they are not considering buying them at the time. This is also true of used car buyers.

Over half of car buyers look periodically at advertising by dealers in their local newspaper, particularly those who have bought a used car from a dealer in the last two years (61%). Almost a quarter (23%) of car buyers who say they do this also cite advertising by the dealer as one of the main reasons they first visited the dealership where they eventually bought their car (see p41).

Shopping for a Car

Q Do you agree or disagree with these statements about shopping for a car?



Base: All bought a car from a dealers in last two years (529)

* Net agree = % agree minus % disagree

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SHOPPING FOR A CAR: TIME

Car buyers are divided on whether it is worth shopping around extensively for a good deal. Two in five (39%) new car buyers agree that it is not worth their time to go all over the place to find the lowest price, while half (49%) disagree. For used car buyers, there is a fairly even split: 44% would shop around, 43% would not. Younger buyers (17-34) are much less likely than others to shop around (28%). They are, of course, more likely to buy a used car rather than a new one, but are likely to spend less money for the car.

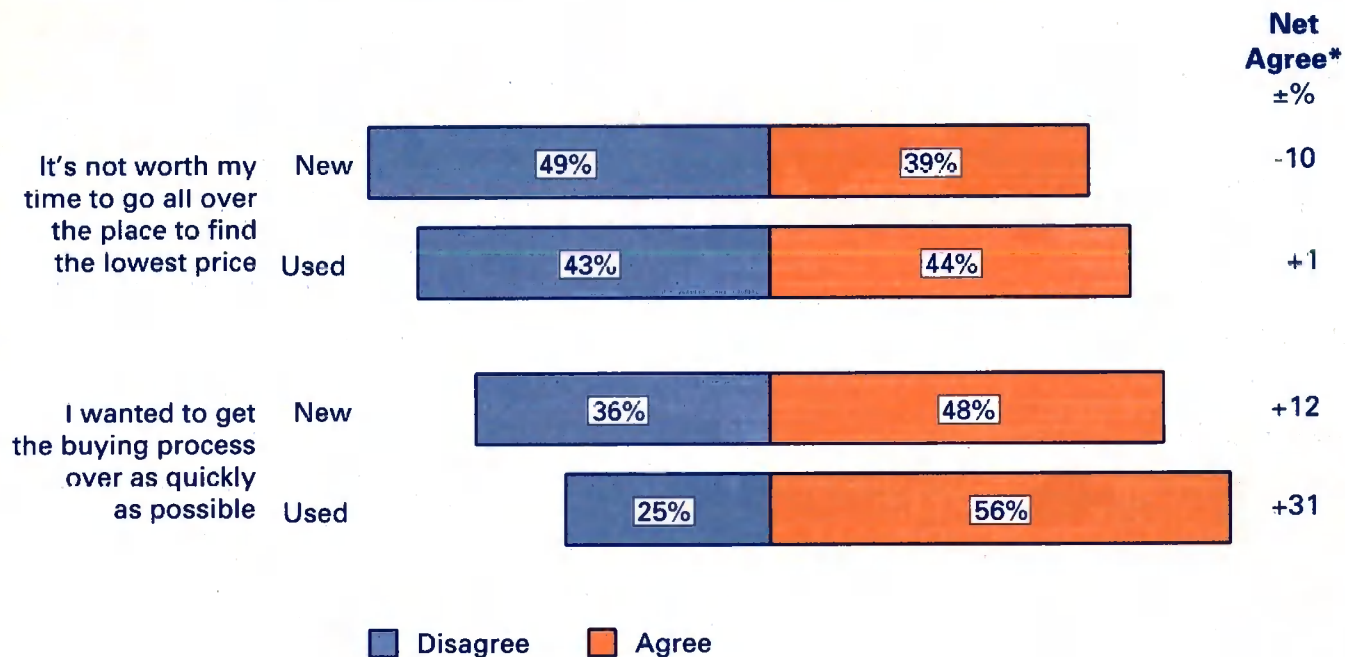
Around half of car buyers wanted to get the buying process over as quickly as possible. For new car buyers, 48% agree with this view, with a third (36%) disagreeing and the rest (17%) remaining neutral or giving no opinion. For used car buyers, 56% agree, 25% disagree and 19% remain neutral.



1994 LEX REPORT ON MOTORING – The Consumer View

Shopping For A Car: Time

Q Do you agree or disagree with these statements about shopping for a car?



Base: All bought car from a dealer in last two years (529)

* Net agree = % agree minus % disagree

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SHOPPING FOR A CAR: TYPE OF DEALER

The vast majority of car buyers like to buy from a well-known manufacturer – 83% of new car buyers and 64% of used car buyers. Most likely to disagree with this are those aged under 35 (21% disagree), although, overall, they are still favourable towards well known manufacturers (59%). Those aged 55 or over are the most likely to buy a well-known make, with 88% agreeing with this view.

Car buyers also like to buy from a local dealer (69% of new car buyers, 59% of used car buyers). This also varies considerably by age – 44% of 17-34 year olds agree (compared with 28% who disagree), while 89% of those aged 55+ agree (compared with only 4% who disagree). Even if car buyers say they **like** to buy local, many still buy from further afield (see p77) – two in five (42%) of those who bought from a dealership over 10 miles from their home say they like to buy from a local dealer.

Car buyers are divided in their views on large dealers. Shopping at the dealer with the biggest selection in stock is important to a third (33%) of new car buyers, while 40% disagree. For used car buyers, the reverse is true (40% agree, 33% disagree). A large selection is more important to older buyers aged 55+ (47%).

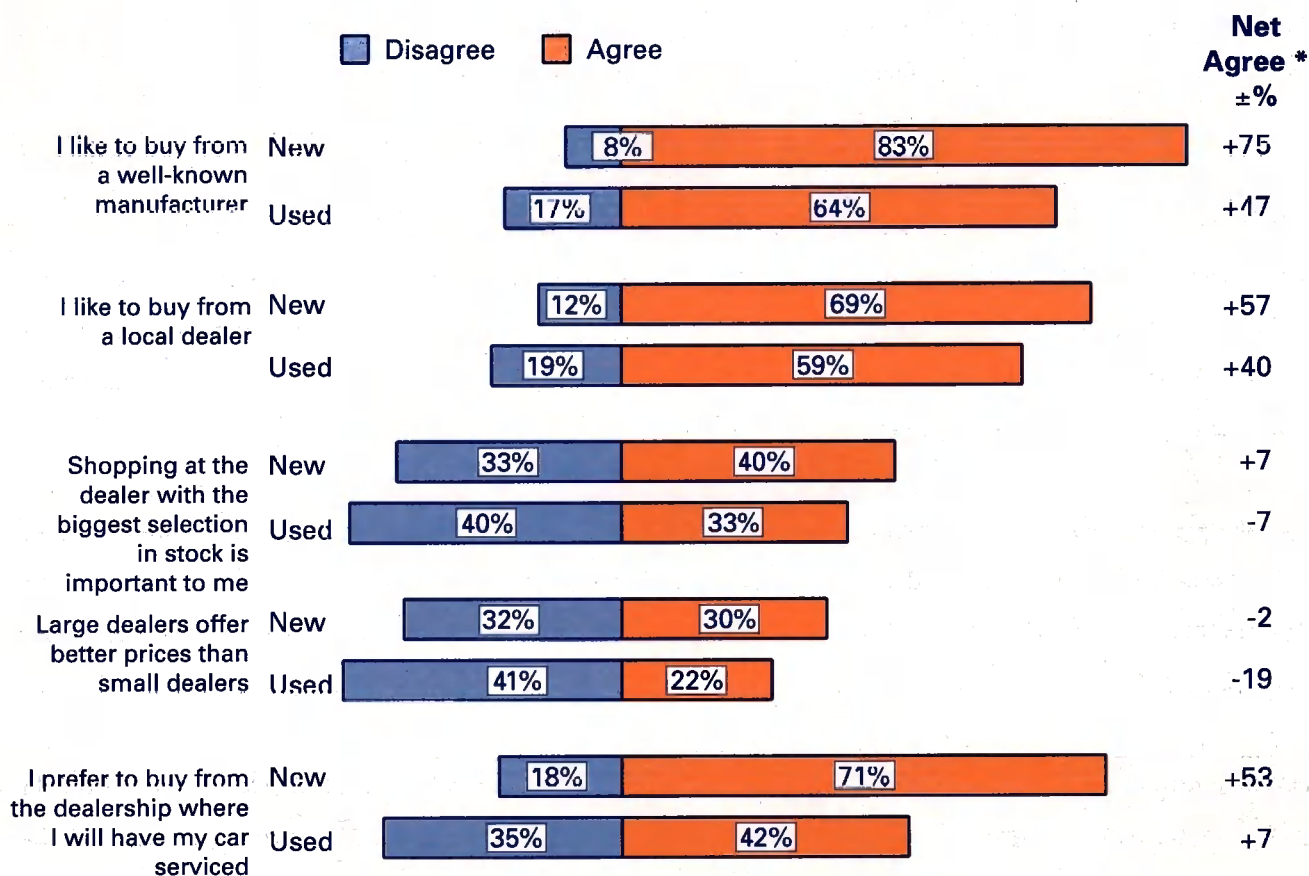
New car buyers are also divided in whether they think large dealers offer better prices than small dealers (30% agree, 32% disagree). Used car buyers are more sceptical – only 22% think large dealers offer better prices, while 41% disagree. Those who bought their car (whether new or used) from a franchise dealer for their make of car are more likely to think that large dealers offer better prices.

New car buyers tend to prefer buying from the dealership where they will have their car serviced (71% agree with this), while used car buyers are more divided (42% agree, 35% disagree). Also, older buyers (who are more likely to buy new cars – see p63) tend to buy from a dealership where they intend to get the car serviced (83%).

Only a fifth in each case said it didn't matter to them whether the car was from an imported or British manufacturer although this decision is clearly linked to whether or not they have decided on make of car before approaching a dealership.

Shopping for a Car: Type of Dealer

Q Do you agree or disagree with these statements about shopping for a car?



Base: All bought car from a dealer in last two years (529)

* Net agree = % agree minus % disagree

Q Which if any, of these statements to apply to your consideration before actually purchasing your car? (selected statement)

	New %	Used %
I didn't care whether the car was from an imported or British manufacturer	22	19

Base: All bought car from a dealer in last two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SHOPPING FOR A CAR: SALESPEOPLE

At first glance, salespeople have a fairly good image among car buyers – the majority think they are helpful in deciding which car to buy (more so for new car buyers).

However, almost half of car buyers do not trust them; almost a quarter disagree and about three in ten are neutral. This attitude is evident among both new and used car buyers.

Many also think that most salespeople treat male car buyers better than female car buyers – two in five hold this view, while a quarter disagree. Somewhat unsurprisingly, women are more likely than men to think this (51% vs 33%), but so are younger people (53% of 17-34 year olds vs 26% of those aged 55+).

Many car buyers (31%) dread the process of negotiating the price of the car they want to purchase, although the majority disagree. Used car buyers are more likely than new car buyers to dread the negotiation process (35% vs 24%). Also, women are more likely than men (41% vs 26%).

The main positive characteristics of salespeople **at the dealership where the buyer bought the car** are that he/she was polite and courteous (61%, rising to 77% among those aged 55+), offered to take them out on a test drive (55%), spent enough time with them (45%), was honest with them (39%) – in view of the fact that many do not trust car salespeople – and answered their questions clearly (37%).

Many would buy from that particular dealership next time (41%), and many would recommend them (31%); indeed, 12% already have.

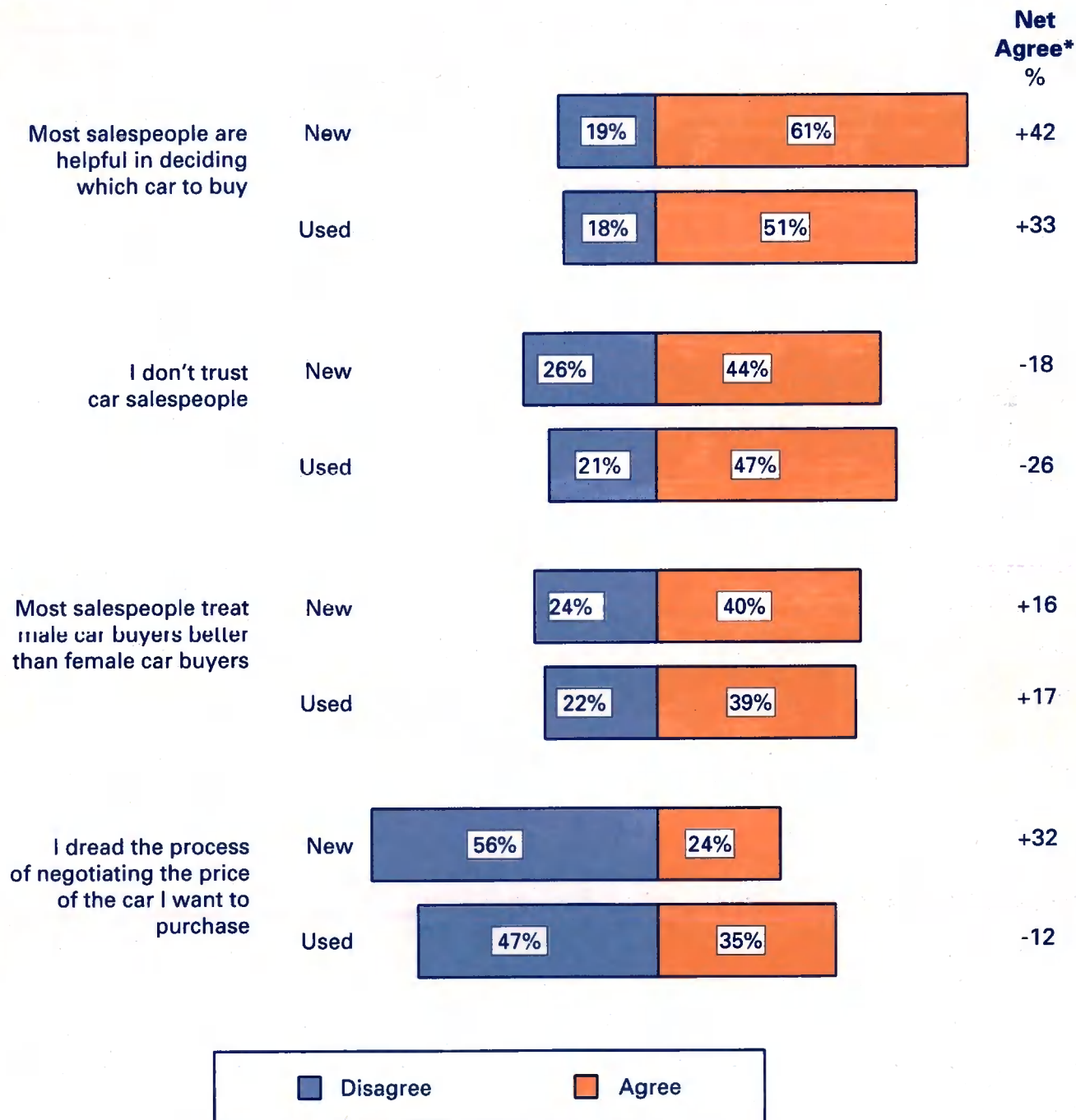
Only 2% of salespeople (at dealerships where the car was bought) are female.

The few negative statements that were included were only mentioned each by a small proportion – bear in mind, however, that these are views about dealerships where the buyer bought the car, not their views about dealerships in general. Buyers did, despite these comments, still buy their car at these dealerships.

One in seven salespeople checked the 'deal' out with the Sales Manager, although the vast majority of these (both for new and used cars) were from franchise dealers.

Shopping for a Car: Salespeople

Q Do you agree or disagree with these statements about shopping for a car?



Base: All bought a car from a dealer in last two years (529)

* Net agree = % agree minus % disagree

Source: Lex Report on Motoring 1994, The Consumer View/MORI



1994 LEX REPORT ON MOTORING – The Consumer View

SATISFACTION WITH SALES PERSONNEL

Virtually all of those who have bought a car from a dealer in the last two years were satisfied with the sales personnel at the dealership where they bought their car – indeed, three in five (58%) were **very** satisfied. Only 4 % were dissatisfied (but still bought their car there).

Generally, satisfaction with sales personnel varies little between new and used car buyers, but new car buyers are more likely to be **very** satisfied (66%) than used car buyers (53%). Car buyers are more likely to be **very** (rather than fairly) satisfied with the sales personnel at the dealership where they bought their car having not visited any others.

	Total % (529)	Total Number of Dealers Visited		
		1 % (146)	2/3 % (119)	4+ % (248)
Very satisfied	58	67	60	53
Fairly satisfied	32	21	33	37
Neither satisfied/dissatisfied	3	2	3	3
Very/fairly dissatisfied	4	5	1	6
Neither/no opinion	3	5	3	1

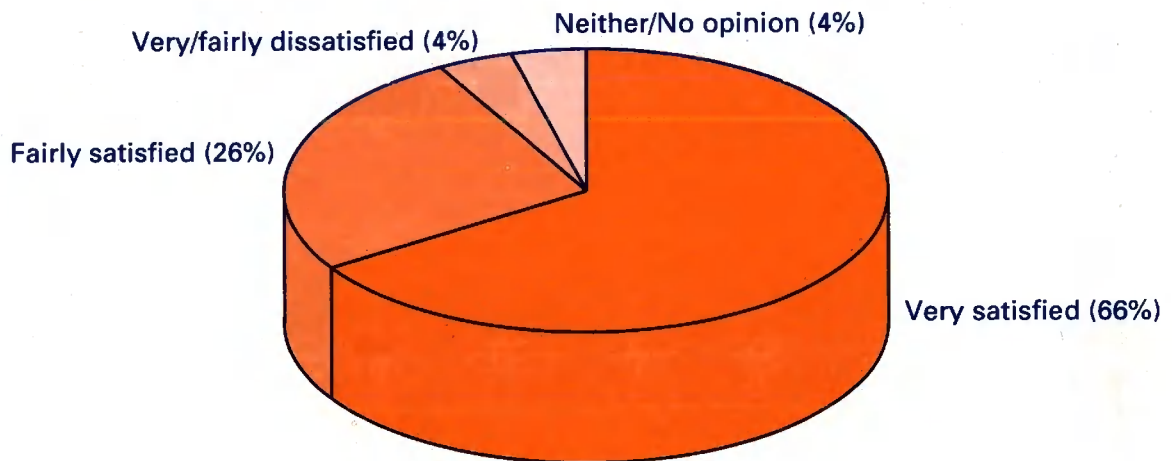
Base: All bought car from dealer in last two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

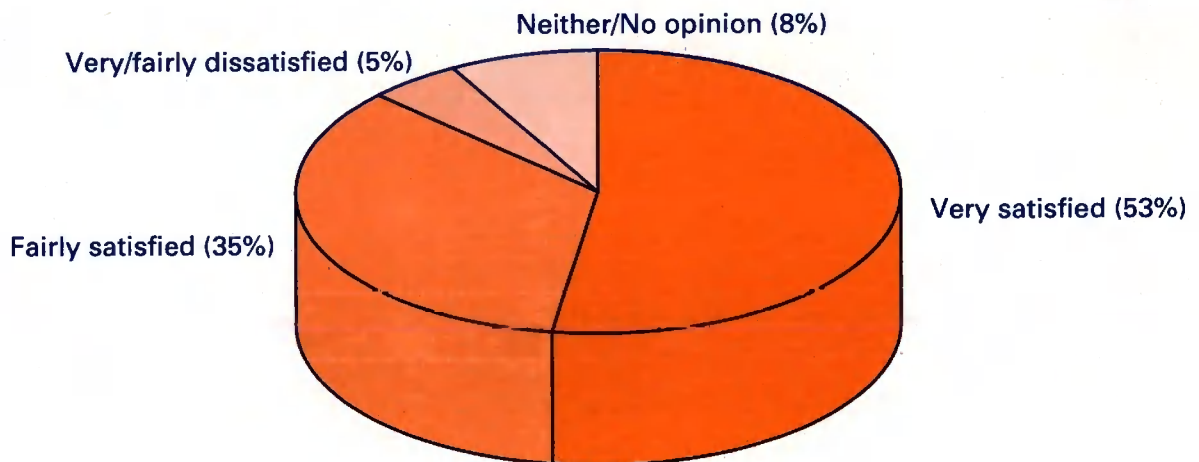
Satisfaction with Sales Personnel

Q Overall, how satisfied or dissatisfied were you with the sales personnel at the dealership where you bought your car?

New



Used



Base: All bought car from a dealer in last two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI



1994 LEX REPORT ON MOTORING – The Consumer View

Salespeople at Dealerships

Q Which, if any, of these statements applies to the salesperson at the dealership where you purchased your car? (selected statements)

	Total (529) %	New (199) %	Used (330) %
Was polite and courteous	61	68	57
Offered to take me out on a test drive	55	52	57
Spent enough time with me	45	50	42
Is someone I would buy from next time	41	43	40
Was honest with me	39	35	41
Answered my questions clearly	37	39	36
Offered me an excellent price	36	43	32
Is someone I would recommend	31	33	30
Had an excellent selection of cars in stock	22	18	24
Checked the "deal" out with the Sales Manager	15	14	16
Is someone I have already recommended	12	14	11
Made negative comments about competitive makes of car	3	5	2
Was too pushy	2	3	2
Was female	2	2	2
Tried to sell me a car I didn't want	2	2	1
Was too pushy	2	2	1
Confused me when discussing price	1	2	1
None of the above	2	3	2
Don't know	2	2	2

Base: All bought car from a dealer in last two years (529)

Source: Lex Report on Motoring 1994, The Consumer View/MORI



SERVICING

SERVICING

WHO DOES THE SERVICING?

Nearly all male drivers (93%) and just over half (54%) of female drivers have primary responsibility for getting their car serviced.

Around one in three of these (34%) have their car serviced by a main dealer for their make of car although this is far higher for new cars (65%) than for used cars (18%). For two-thirds of these – 72% of new car buyers and 62% used – the dealer who services the car is the same dealer who sold them the car. An additional 2% go to a main dealer for another make.

65% of main dealer service work is on cars bought new. Their servicing is also concentrated on relatively young cars. 65% of the cars they service are up to three years old, 26% of cars between three and six years old and only 9% cars over six years old.

Nearly three out of four drivers using garages or dealerships tend to get their car serviced at the same place as they get their MOT done. The main reason given for not doing so is that the garage does not undertake MOTs (43% of those who use different garages).

One in five (19%) either physically services the car themselves or have it done by somebody else in their household and this is particularly high for men (24%), young drivers (33% of those aged 17-24) and those with used cars (24%). Used cars make up 86% of DIY servicing.

One in seven (14%) have their car serviced by a friend or acquaintance and this tends to be higher for drivers aged 17-34 (19%) and those with used cars (19%). Altogether some 6.4 million drivers either service their car themselves or get someone else in their household or a friend or acquaintance to do it for them.

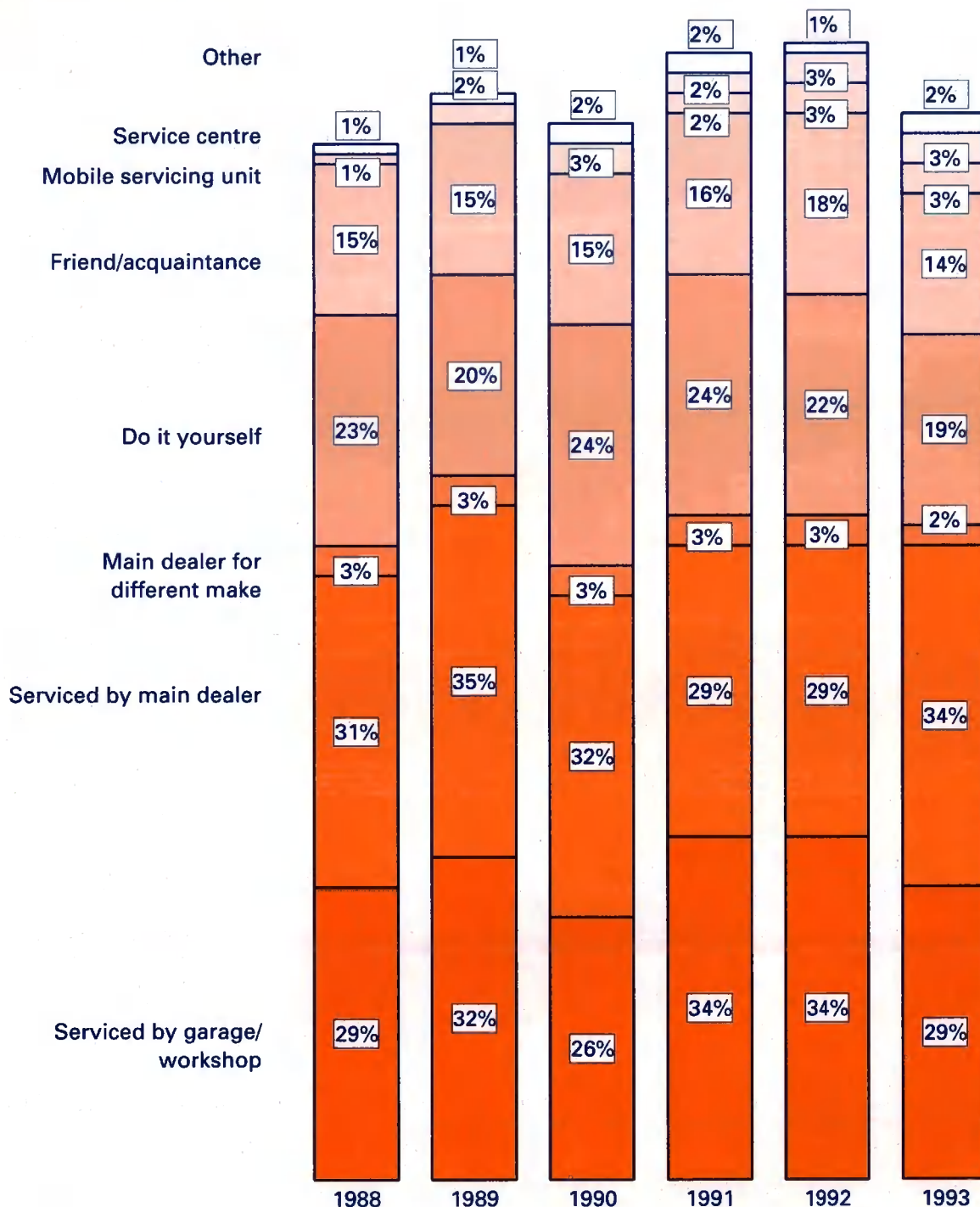
Service centres (3%), mobile servicing units (3%) and others (2%) have relatively small shares of the market.

This would suggest a switch back to main dealer servicing and away from garage/workshop or DIY servicing. Main dealer servicing is now at its highest level since 1989.

It is also interesting that the number of drivers giving multiple answers to these questions has declined this year compared with recent years. It is now an average of 1.06 compared with 1.13 suggesting fewer are using a combination of means for servicing.

Who does the servicing?

Q Which of these do you do?



Totals add to more than 100% because of use of more than one type of servicing.

mobile servicing included in 'other' in 1988 and 1989

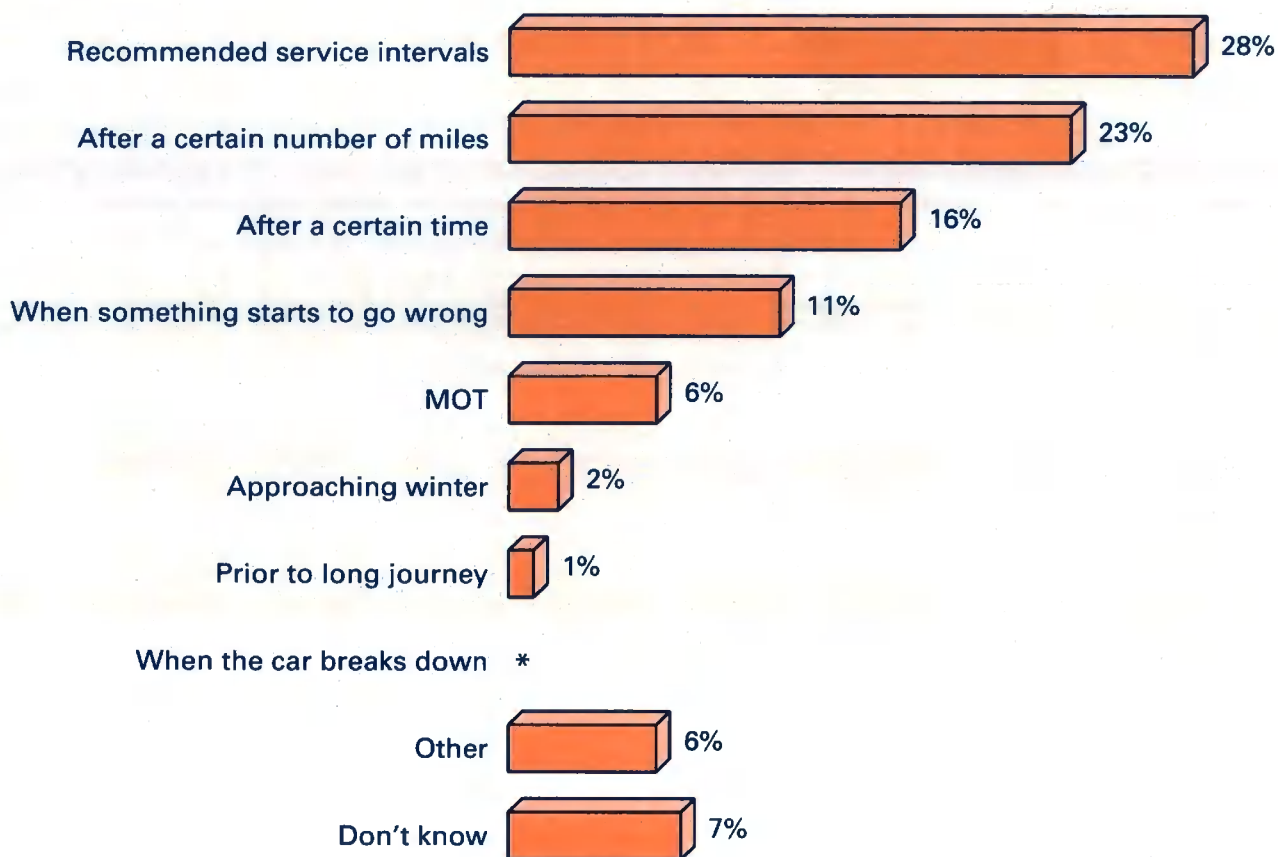
Base: All with responsibility for getting car serviced (1,324)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

REASONS FOR SERVICING

Only half of those responsible for getting their car serviced do so either at the recommended service intervals (28%) or after a certain number of miles (23%). One in ten (11%) do so only when something tends to go wrong, and this is particularly true of young (17-24 year old) drivers (29%) and those driving cars over six years old (20%). One in twenty (6%) get their car serviced ready for the MOT.

Q What determines when you normally get the car (the one you drive most often) serviced?



Base: All responsible for servicing their car (1,324)

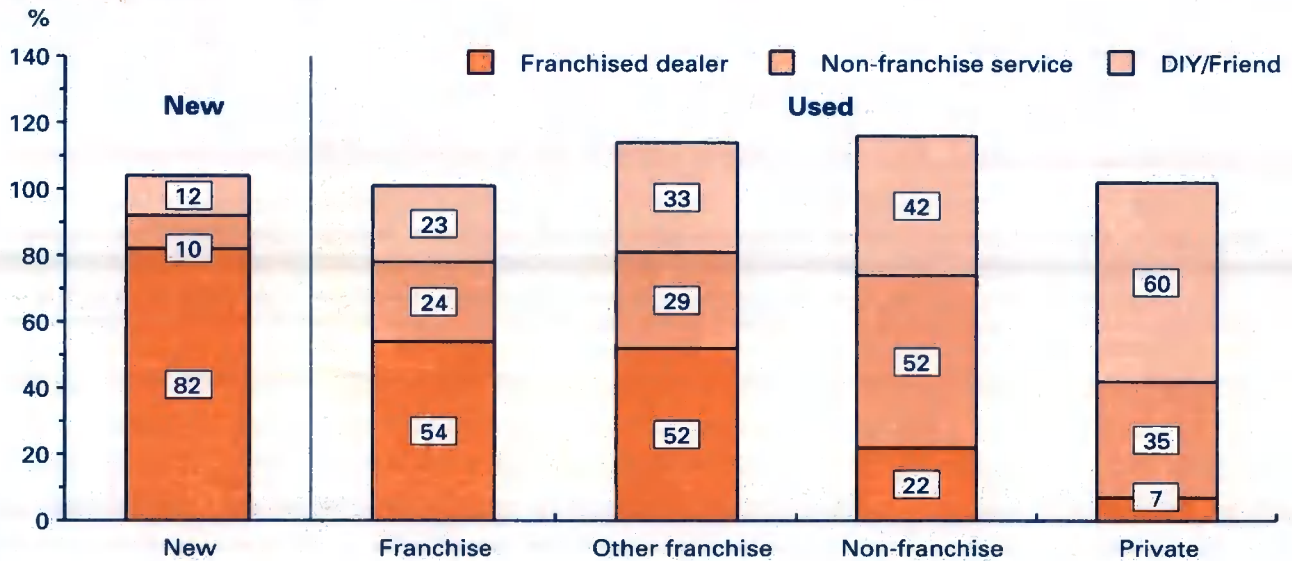
Source: Lex Report on Motoring 1994, The Consumer View/MORI

LOYALTY TO SERVICE LOCATION

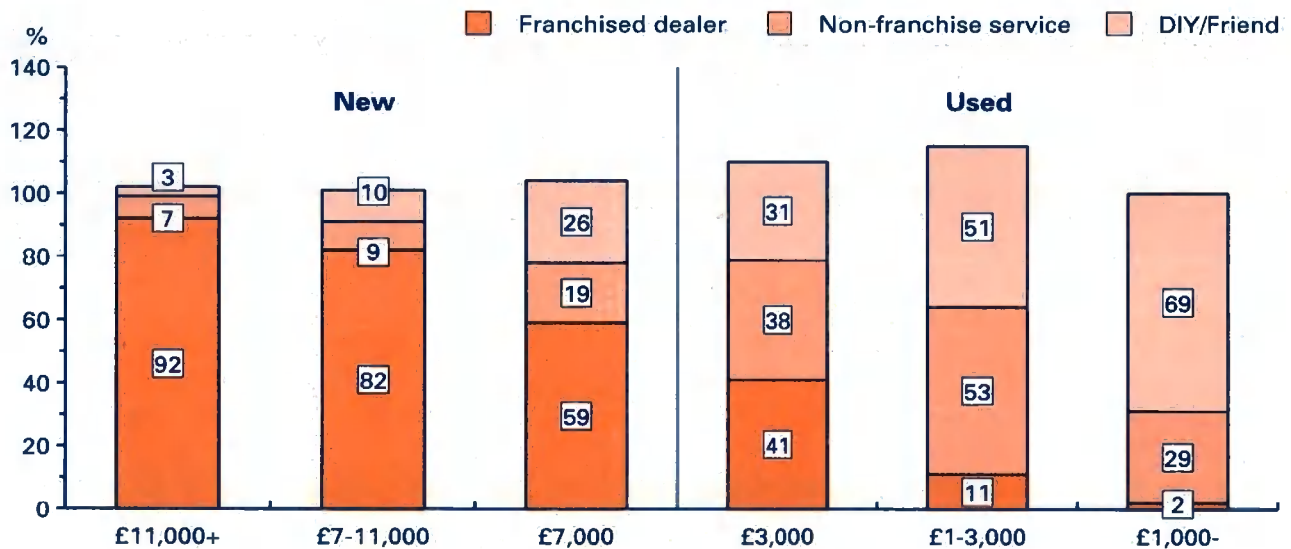
Those using dealers, garages or service centres/units for service and repair work clearly like to find a good supplier and stick with them. On average drivers have been with their suppliers for 3.2 years though this rises progressively with age reaching 4.4 years for those aged 65+. Indeed over a third (37%) of drivers in this age group have used the same supplier for over six years. Those with older cars tend to have been more loyal than those with younger cars, and private drivers more so than company car drivers.

Five out of six drivers (83%) responsible for servicing their car would recommend the garage they use to other members of their family or friends. The main group that would not do so are those who use a main dealer for their make of car. One in seven of this group (14%) took this view although it is not clear if this is because they see them specialising just in their particular make.

Service location by where bought



Service location by cost of car



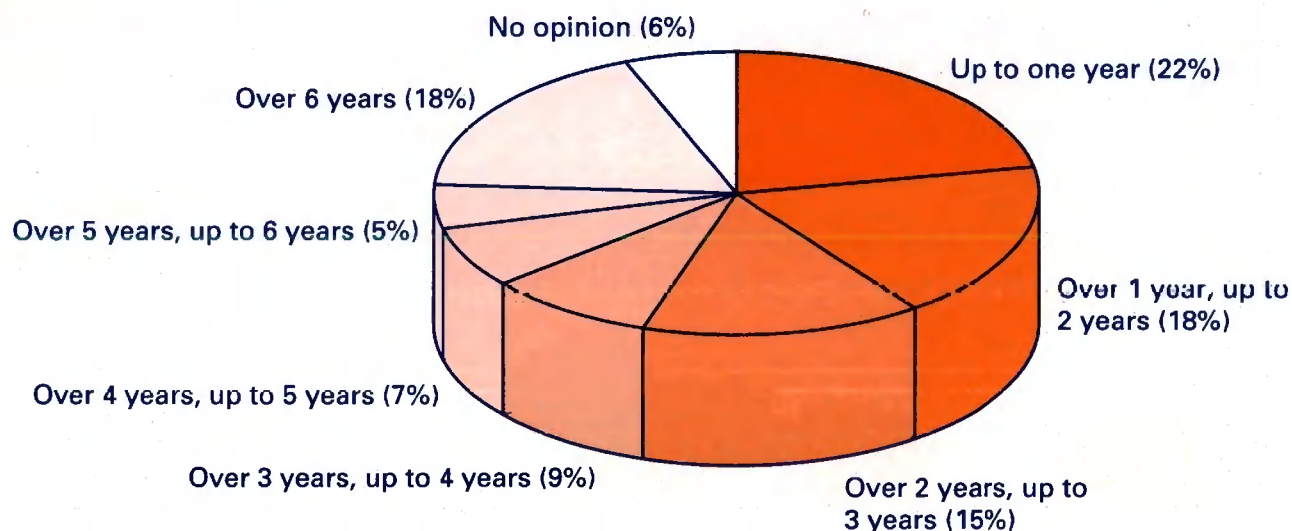
Totals add to more than 100% because of use of more than one type of servicing.

Base: All responsible for servicing their car (1,324)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Length of Time with Current Garage

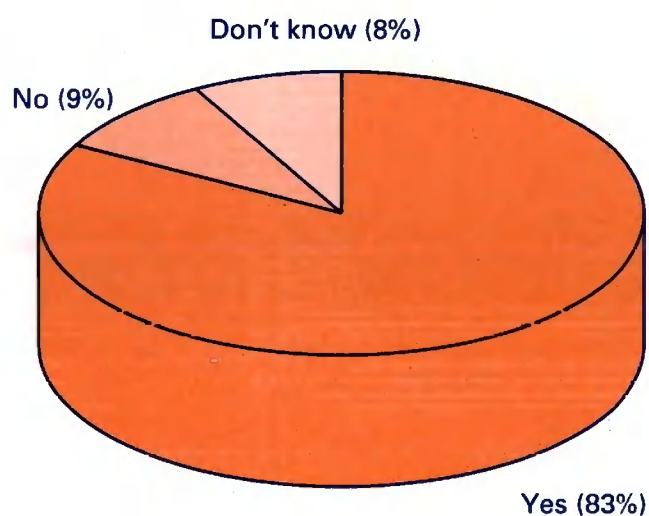
Q For how long have you been using your current garage outlet or chain for service or repair work?



Base: All who get their car serviced by a dealer/garage/service centre/service unit (943)

Recommending Garages

Q Would you recommend the garage you use to other members of your family or friends, or not?



Base: All who get their car serviced by a dealer/garage/service centre/service unit (943)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

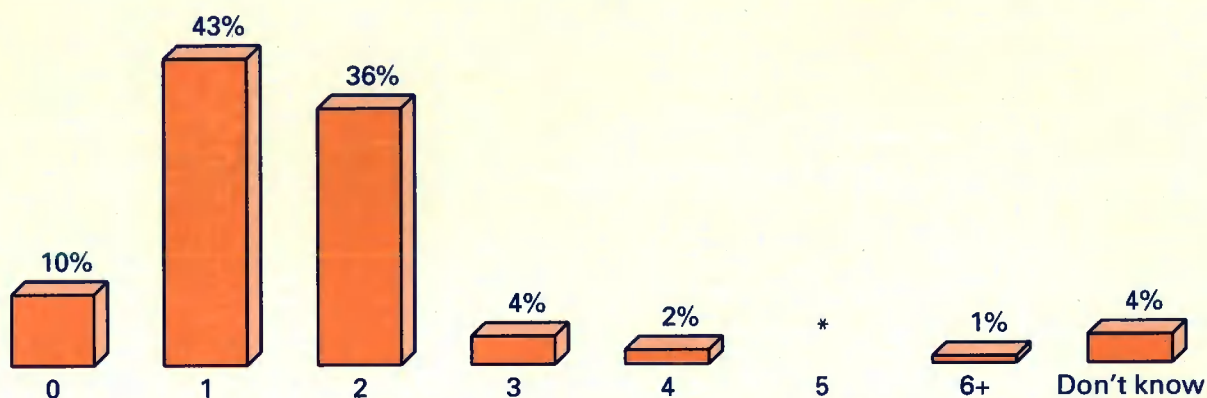


FREQUENCY OF SERVICING AND REPAIRS

The average car has been serviced 1.5 times in the last year. One in ten (10%) – 2.5 million cars – has not been serviced at all. As one would expect, frequency of services relate to the number of miles driven. Based on average miles travelled per year, low mileage cars (0-6,000 miles) get serviced on average every 3,100 miles (because the car is probably serviced on a time interval), medium mileage cars (6,000 –20,000) about every 7,400 miles and high mileage cars (20,000+) every 11,200 miles. These will tend to be the newer cars with extended service intervals. Company cars seem to be serviced after rather more miles on average than private cars (9,400 compared with 6,800).

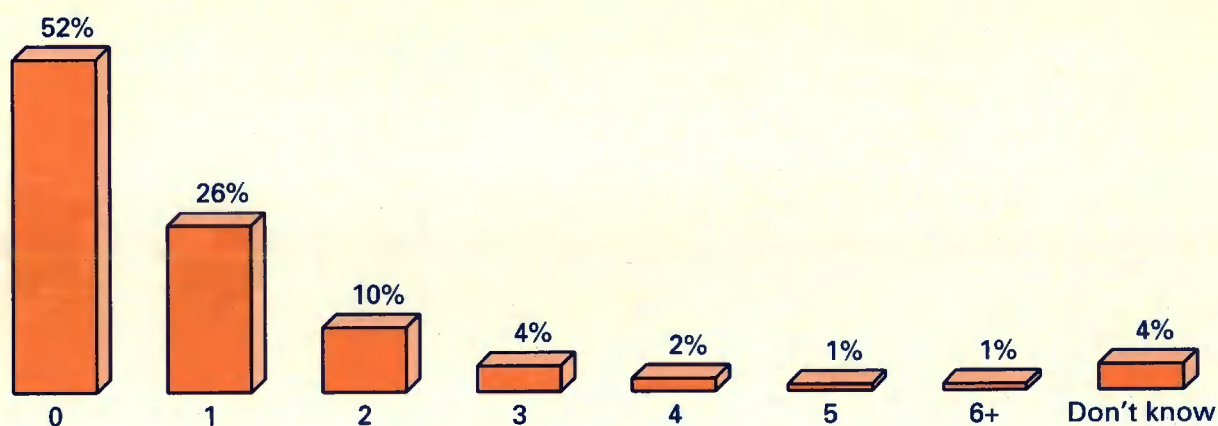
Frequency of Servicing and Repairs

Q How many times has the car you drive most often been serviced in the last year?



	Age of car						Miles driven/year		
	All (889)	New (442)	Second Hand (443)	Up to 3 years (400)	3-6 years (246)	Over 6 years (232)	0- 6000 (194)	6001- 20000 (518)	20,000+ (155)
Average	1.5	1.6	1.4	1.6	1.6	1.4	1.1	1.5	2.6
Est. Miles between services	7100	7800	6900	8100	6600	6300	3100	7400	11,200
Est. time between servicing – months	8	8	9	8	8	9	11	8	5

Q How many times has the car you drive most often been repaired in the last year?



	Age of car						Miles driven/year		
	All (889)	New (442)	Second Hand (443)	Up to 3 years (400)	3-6 years (246)	Over 6 years (232)	0- 6000 (194)	6001- 20000 (518)	20,000+ (155)
Average	0.8	0.6	0.9	0.5	0.7	1.1	0.7	0.7	1.0

Base: All serviced by garage/dealer (889)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

SATISFACTION WITH SERVICING

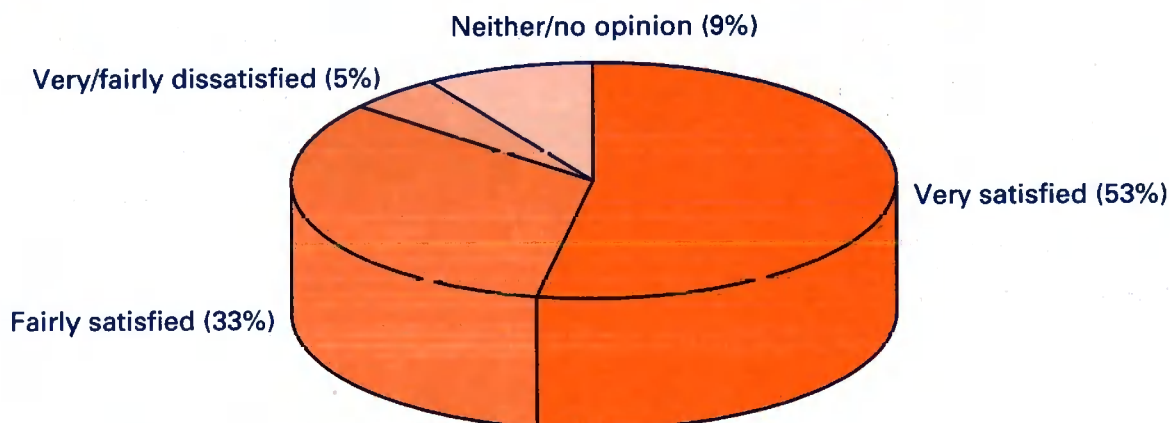
Overall 89% of respondents responsible for getting their cars serviced expressed satisfaction with the way this was done and only 3% dissatisfaction, although satisfaction was slightly higher among those who use a garage or workshop than a main dealer. 86% of those who had their cars serviced by a main dealer for their make of car expressed satisfaction and only 5% dissatisfaction; this represents some 5.5 million satisfied customers compared with 0.3 million dissatisfied customers. 92% of those who had their cars serviced by a garage or workshop expressed satisfaction and only 2% dissatisfaction. These were the same proportion as last year except those 'very' (rather than fairly) satisfied has increased from 56% in 1992 to 63% in 1993.

Some reasons given for satisfaction are: *"reliable service", "know what they are doing", "attentive", "let me know before doing extra work", "can be trusted", "do what needs to be done", "car runs better after it has been serviced"*.

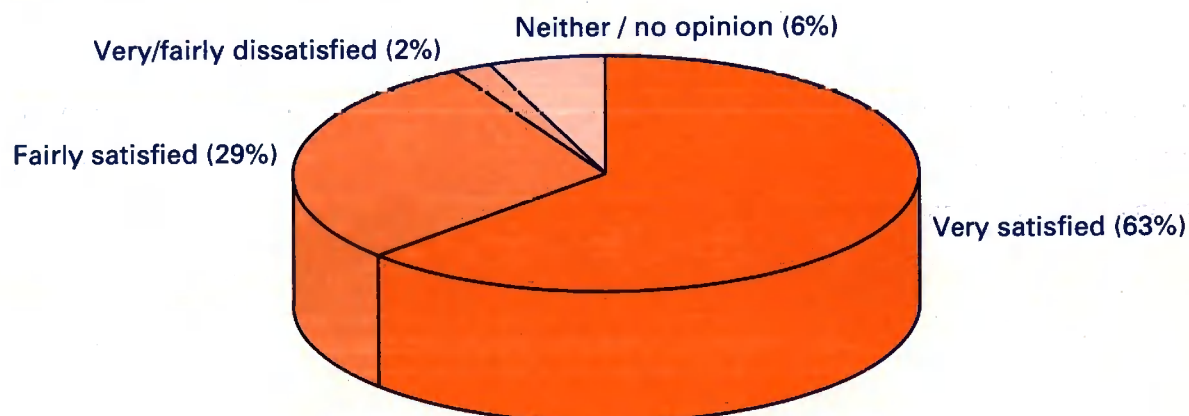
Research in previous years' Lex Reports has revealed that one of the main reasons for the very high levels of satisfaction is that those who are dissatisfied decide to get their car serviced elsewhere so those we interview are most likely to have found a garage they are happy with.

Satisfaction with Servicing

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



Base: Car serviced by main dealer for make (526)



Base: Car serviced by garage/workshop (373)

	Serviced by main dealer					Serviced by garage/workshop				
	1989 %	1990 %	1991 %	1992 %	1993 %	1989 %	1990 %	1991 %	1992 %	1993 %
Very satisfied	42	43	48	47	53	60	53	57	56	63
Fairly satisfied	41	40	38	38	33	32	38	34	36	29
Very/fairly dissatisfied	8	6	6	5	5	3	4	5	2	2
Neither/no opinion	8	11	8	10	9	6	5	4	6	6

Source: Lex Report on Motoring 1994, The Consumer View/MORI

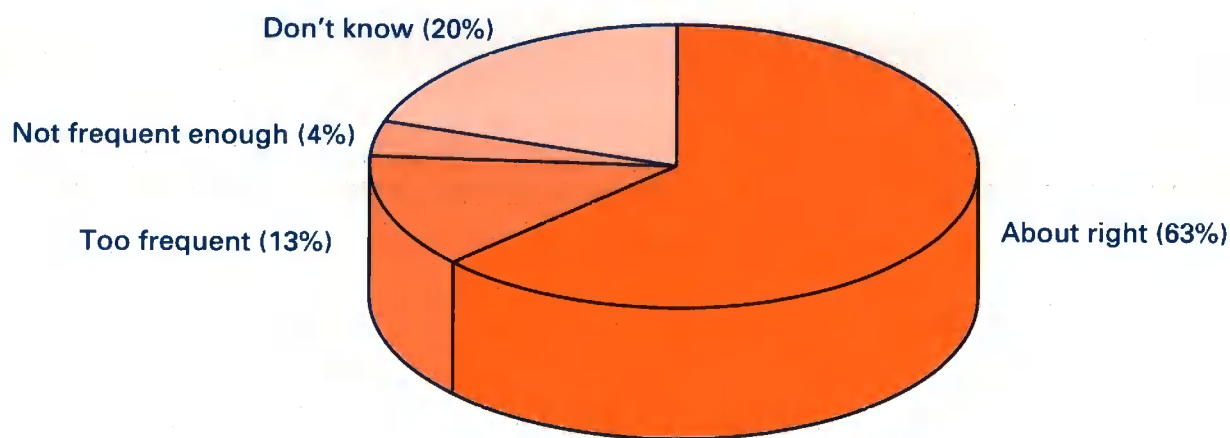
SERVICE INTERVALS

The majority (63%) of drivers responsible for servicing their car think that the service intervals recommended by car manufacturers are about right. One in eight (13%), however, thinks they are too frequent and one in twenty-five (4%) thinks they are not frequent enough, with 20% who say they don't know.

The main reasons given for believing the recommended intervals to be too frequent are that *'manufacturers are just trying to take your money'* (mentioned by 47%), *'things don't go wrong with new cars'* (10%) and *'I check for those things myself'* (10%).

The main reasons given for believing the recommended intervals to be not frequent enough are that *'it is safer to have frequent checks'* (41%) and *'I do a lot of miles so I have to get frequent checks'* (21%).

Q Do you think that the service intervals recommended by car manufacturers are generally too frequent, not frequent enough or about right?



Base: All responsible for servicing their car (1,324)

Source: Lex Report on Motoring 1994, The Consumer View/MORI



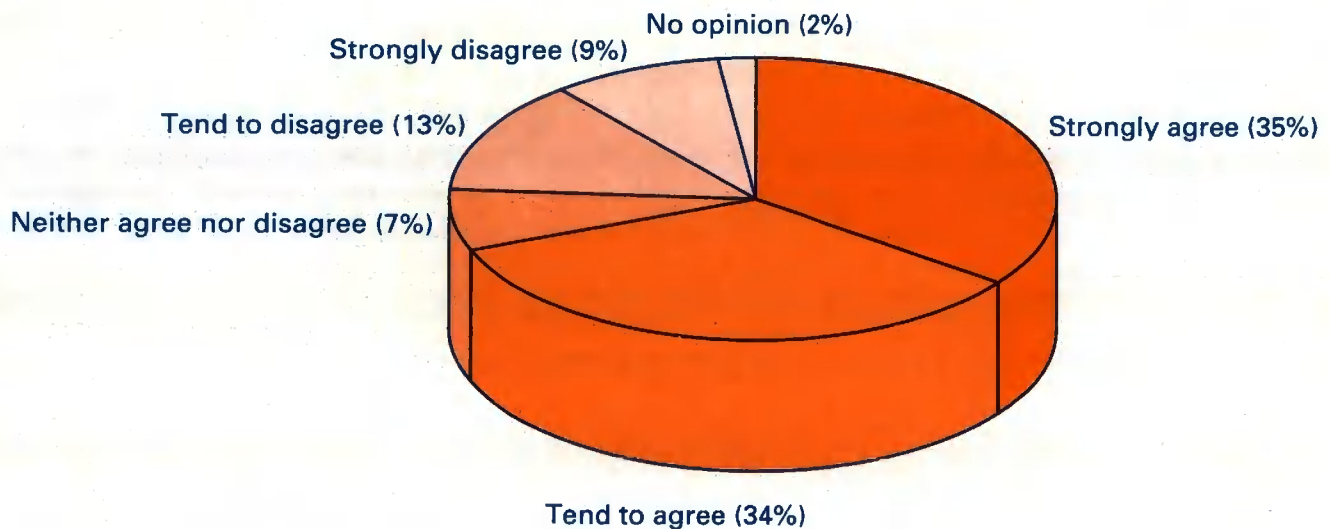
MOTORWAYS

MOTORWAYS

BREAKDOWNS ON MOTORWAYS

Overall, drivers think that, if you break down on a motorway and are waiting for help to arrive, it is generally safer to remain in your car than to wait outside. One in five, however, disagrees. Women are more likely than men to think that it is safer to wait inside.

Q “If you breakdown on a motorway and are waiting for help to arrive, it is generally safer to remain in your car than to wait outside your car”



Base: All drivers (1,720)

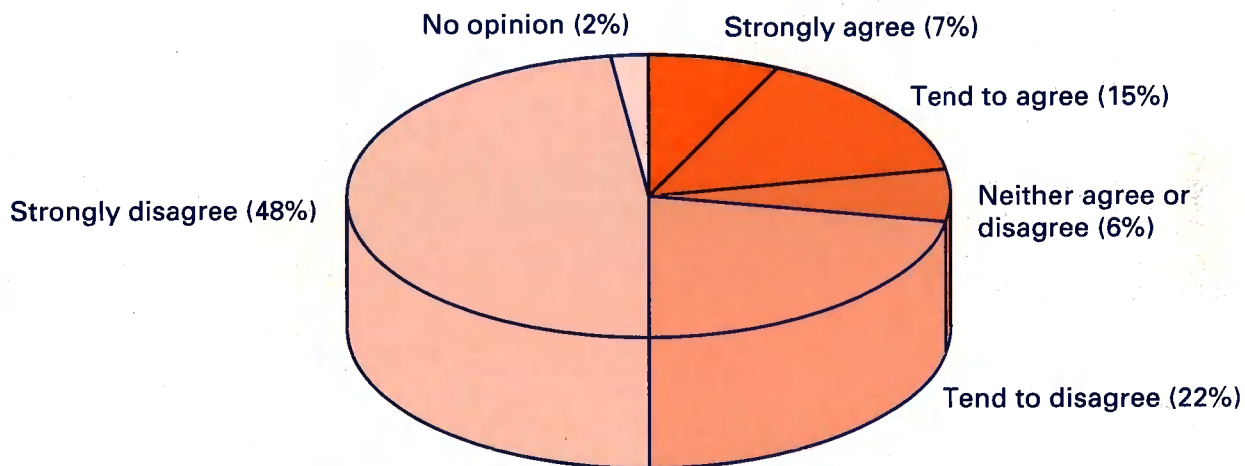
	Men	Women
	%	%
Agree	62	77
Disagree	28	14

Source: Lex Report on Motoring 1994, The Consumer View/MORI

OVERTAKING ON THE LEFT

Two thirds of men and three quarters of women do not support overtaking on the left on a motorway. Those driving high mileages are more likely to favour it – they also drive most in the fast lane of motorway (page 25)

Q “Overtaking on the left should be allowed on motorways”



Base: All drivers (1,720)

	Men (1045)	Women (675)
Agree	27	15
Disagree	67	74

Source: Lex Report on Motoring 1994, The Consumer View/MORI

CAR FEATURES

LIKES AND EXPECTATIONS

Drivers clearly have high expectations for the features on their next car, particularly for safety and security-related features. Looking at features that drivers expect compared to what they currently have, safety aspects are high on the agenda – 35% expect their next new car to have an airbag (up from 9% last year) yet only 2% currently have one; 51% would like one if money were no object. Similarly, 34% expect to have ABS on their next new car (up from 24% last year) but only 10% currently have it, and almost half would like it. Side-impact protection bars are expected by 31%, but only 11% currently have them; two in five would like them.

Security features are also in demand – 47% expect their next new car to have a car alarm, but 31% currently have one. 35% expect high security door locks, but only 14% currently have them.

There are also many features which are still expected by many drivers but also currently owned by many, such as central locking, fully adjustable front seats, powered steering and windows etched with car number.

CAR FEATURES – LIKES AND EXPECTATIONS

Q Thinking of the car you drive most often, which of these features . . .

- does your current car have?
- do you expect your next new car to have?
- Would you like, if money were no object?

	Current Car Has %	Expect Next Car to have %	Would like %
Security			
Car alarm	31	47	38
Central locking	37	43	36
Windows etched with car number	48	38	25
High security door locks/deadlocks	14	35	40
Thief-proof radio/cassette/CD	28	33	37
Engine cut-out device to stop thieves	11	28	38
Mechanical immobiliser (not a steering lock)	9	18	31
Separate thief-proof boot	7	14	29
Hidden 'Tracker' to enable police to detect your car, if it was stolen	1	13	39
Safety			
Airbag	2	35	51
ABS (Anti-lock Braking System)	10	34	46
Side-impact protection bars	11	31	41
Heated front windscreen	22	25	36
In-board computer to detect fog, ice, traffic jams, road works, etc	1	5	28
100 mph speed limiter	3	5	14
Comfort			
Fully adjustable front seats	69	43	26
Powered steering	26	40	40
Adjustable steering wheel	22	25	28
Electric sunroof	13	23	38
Air conditioning	17	18	36
Performance/Environment			
Catalytic converter	13	30	31
Four-wheel drive	4	8	28
In-board computer to calculate MPG and average speed	3	5	23
Accessories			
Car phone	3	6	31
In-board computer to tell you the best routes from A to B	*	3	26
Fax	*	1	11
None of these	1	8	4
Don't know	9	7	8

Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

EXTRA FEATURES

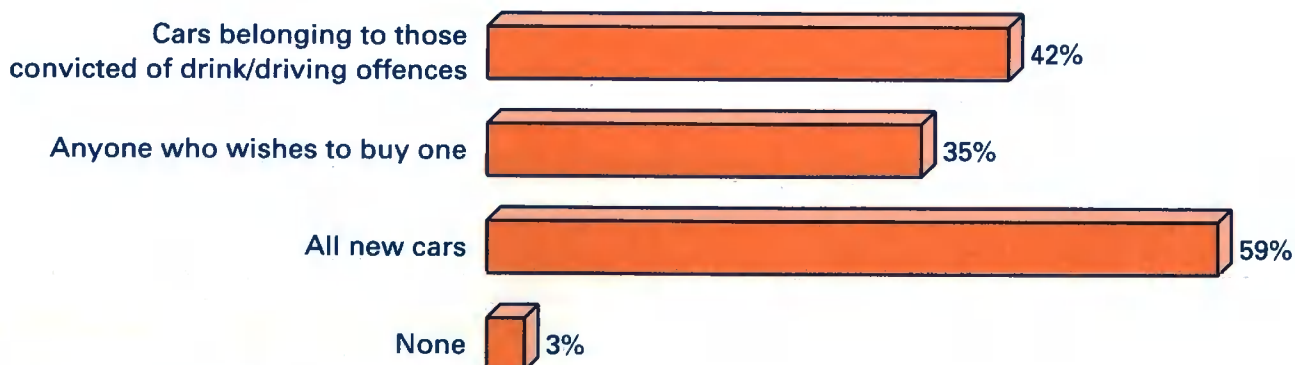
One in five drivers (19%) would be prepared to pay extra for a built-in fold-away child seat in the next car they buy. Particularly willing are those aged 25-34 (34% would be prepared to pay extra) and those currently with children in their household (30% would pay extra).

Four per cent – over a million people – would be prepared to pay extra in their next car for a screen to separate children from adults, while 3% would be prepared to pay extra for a fold-down facility for nappy changing.

Q Which, if any, of these features, not currently offered, would you be prepared to pay extra for in the next car you get?

Built-in fold-away child seat	19%
Screen to separate children from adults	4%
Fold-down facility for nappy changing	3%
Facilities for washing/freshening up	2%
Facility for plugging in portable PC	2%
TV screens in the back of the car	2%
Built-in clothes storage compartment	2%
Fax machine	2%
Fold-out desk	1%
Filing cabinet in rear	1%
None of these	70%

Q A device is now available which can be fitted to a car which prevents it being started if the driver's breath contains more than the legal limit of alcohol. For which of these groups do you think this device should be fitted?



Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

USE OF UNLEADED PETROL

USE OF UNLEADED PETROL

The proportion of drivers who run their car on unleaded petrol continues its upward trend, with over half citing this (52%). In line with the increasing number of new unleaded cars in the car population, the proportion saying their cars cannot use unleaded petrol has fallen to three in ten drivers (31%).

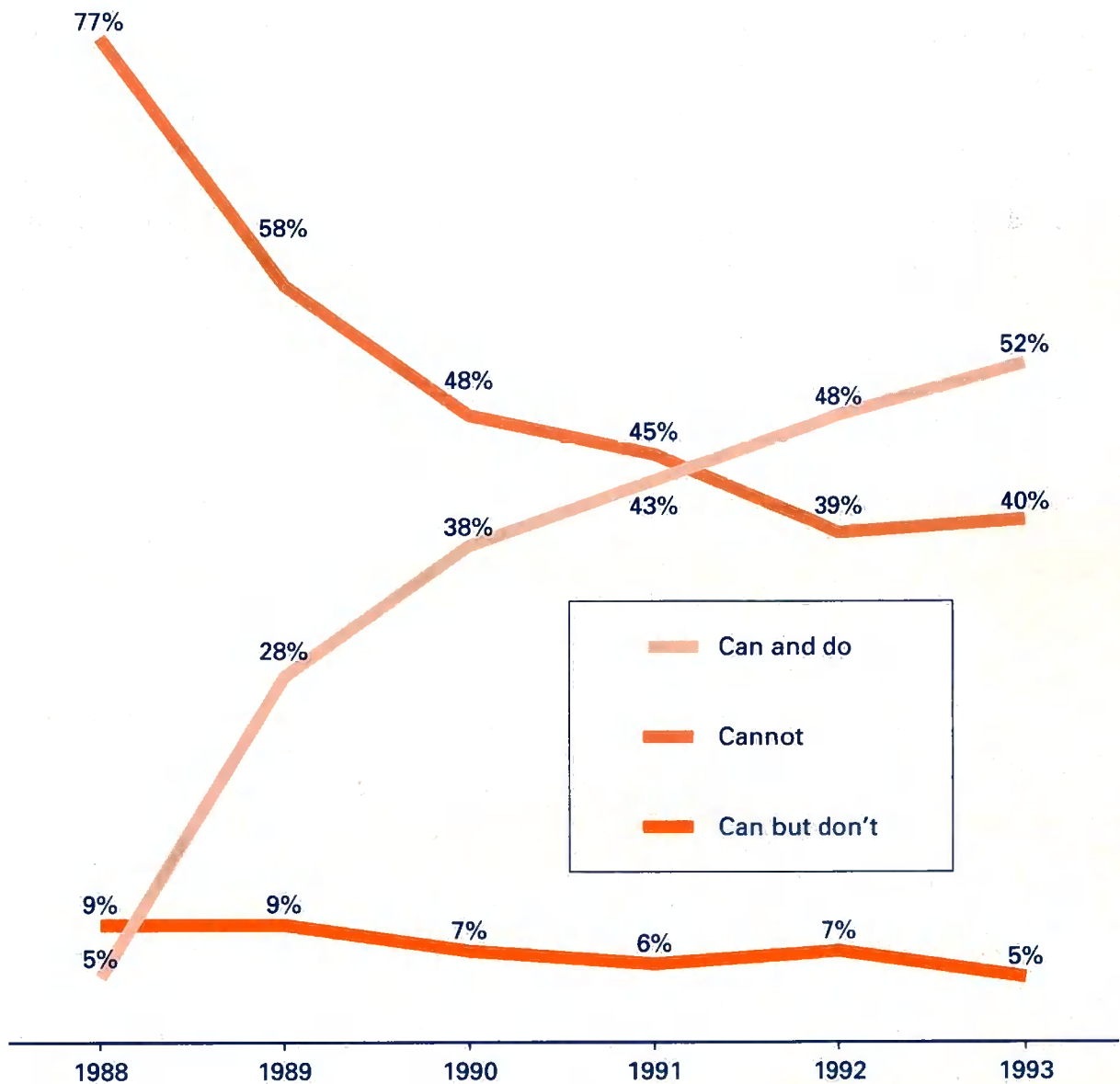
Five per cent can run on unleaded petrol but don't – the main reason being a perceived loss of performance (46%) and one in ten either feel engines prefer 4-star (13%) or say they have always used 4-star petrol.

Among those whose car cannot run on unleaded, a quarter (26%) say it can be adapted, two in five (42%) say it cannot, and a substantial 32% say they don't know. Six per cent say their cars are diesel.

Use of Unleaded Petrol

Q Can your car run on unleaded petrol?

Q Do you usually buy leaded petrol?



Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

DIESEL CARS

NUMBER OF DIESEL CARS

Diesel cars represent 6% of all cars (1.4 million). The rapid rise in the switch to diesel fuelled cars can be seen in the proportions of different aged cars:

	% Diesel
All	6
0-3 years old	11
4-6 years old	4
6+	3
New	10
Used	4
Private	5
Company	14

Base: All cars (2,611)

PROPENSITY TO BUY A DIESEL CAR

Overall, few car drivers (6%) say they are **certain** to buy a diesel car in the future. However, a further 16% say they are very likely. This combined amount of 22% (or 5.5 million people) is up from 15% in 1992, and is supported by the increasing proportion of new cars sold that run on diesel – 19.0% of total new registrations in UK in 1992, compared to just 5.3 % in 1989 (source: SMMT).

Used car and company car drivers continue to be more inclined to consider buying diesel cars than drivers of private cars or cars bought new. Men are more interested in diesel cars than women, while those driving over 20,000 miles per year are the most enthusiastic of all groups, except for current diesel car drivers themselves.

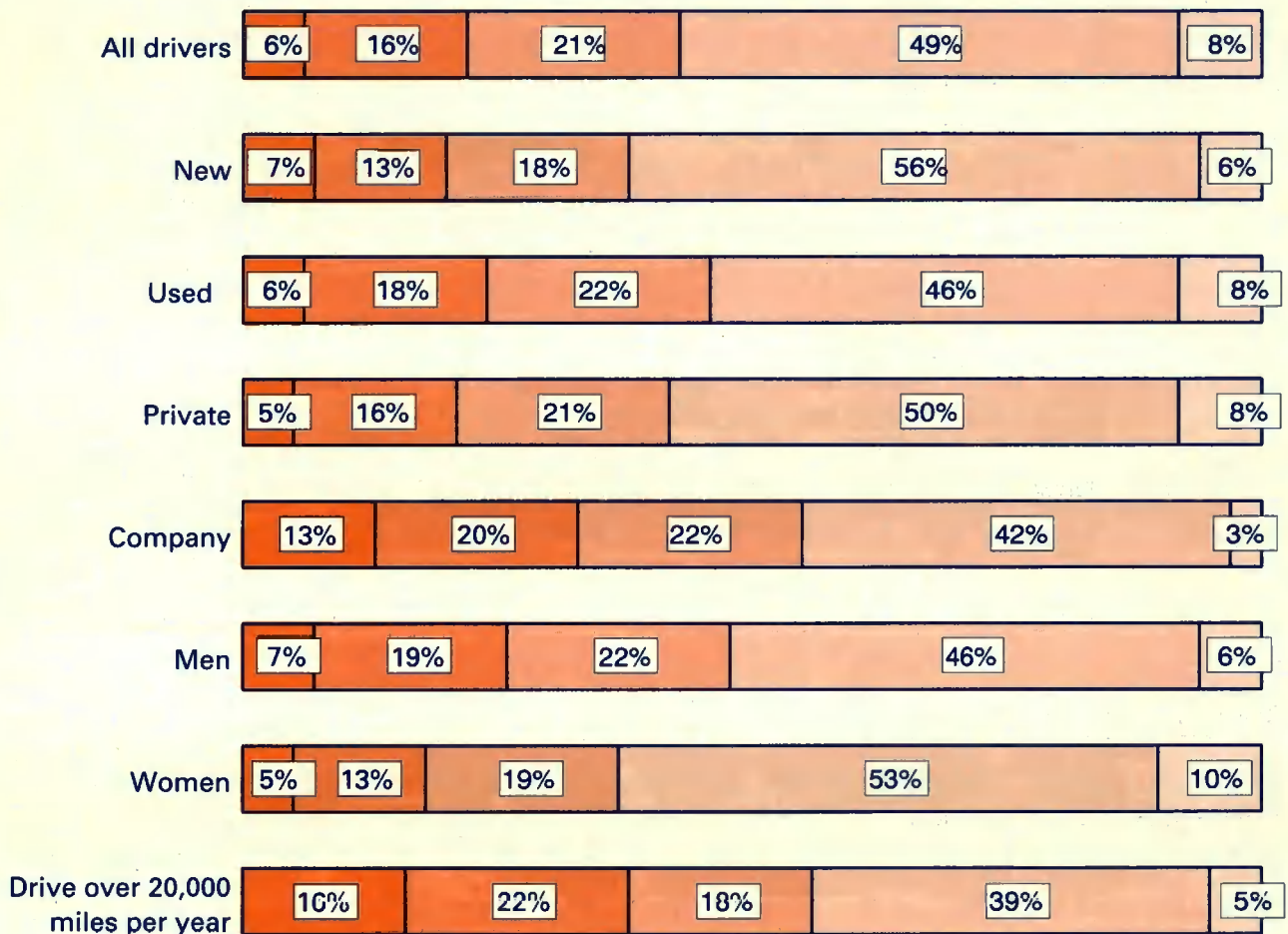
As one might expect, current diesel drivers are more inclined to commit themselves to consider buying a diesel car in the future with 52% certain to, while a further quarter (25%) are very likely.



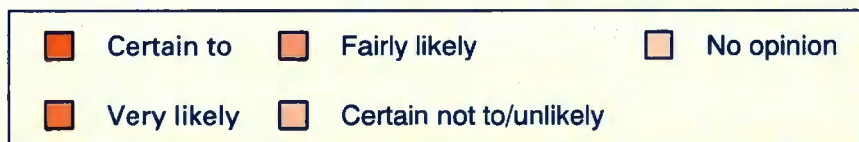
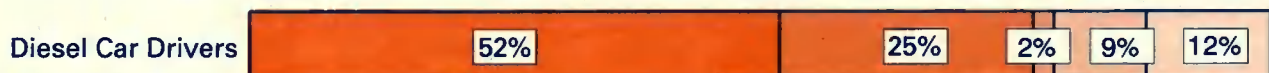
1994 LEX REPORT ON MOTORING – The Consumer View

Propensity to Buy a Diesel Car

Q How likely are you to consider buying a diesel car in the future?



Base: All drivers (1,720)



Base: All whose car runs on diesel (128)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

ATTITUDES TOWARDS LEARNER DRIVERS

The great majority of drivers (78%) agree that learner drivers should take a minimum number of lessons with an Approved Driving Instructor. Only one in seven disagrees (14%), with young drivers aged 17-24 (20%) most inclined to hold this view.

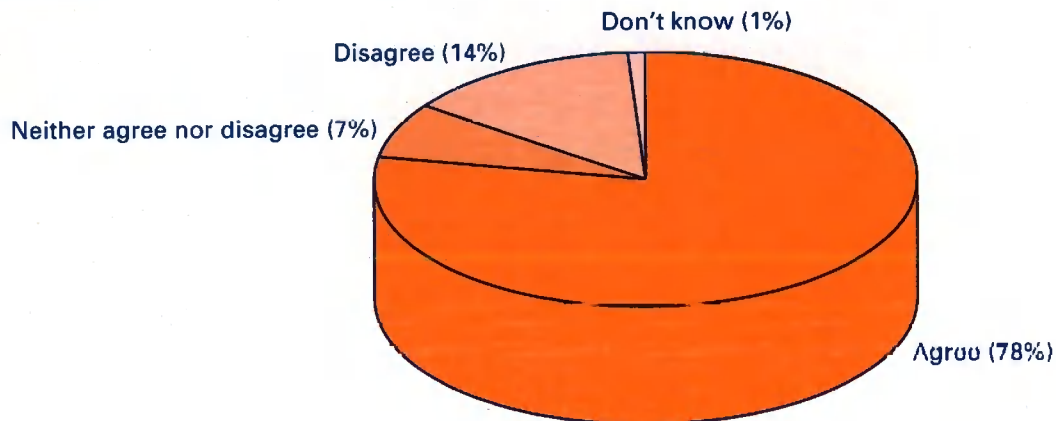
The option of a 'Certificate of Readiness' from an Approved Driving Instructor receives a similarly high level of support, with seven in ten supporting the view that learner drivers should receive the certificate from an ADI before taking a test (72%). Again few drivers disagree (16%) with opposition highest among young single males (24%).

The proposal of motorway driving lessons for drivers who have just passed their test receives overwhelming support from drivers, with nine in ten supporting this proposal (92%). This, as one might expect, falls to 79% among young single male drivers and 85% among 17-24 year old drivers. Opposition is also highest among these groups.

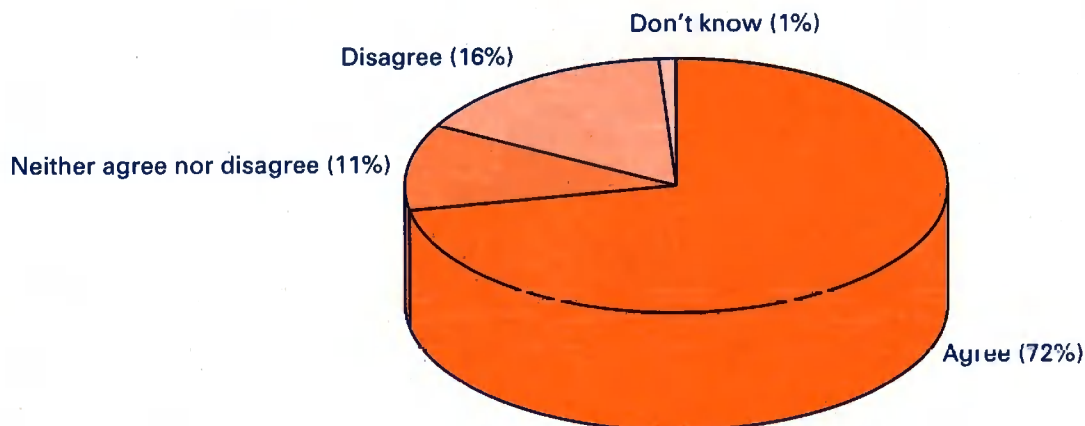
Five out of six children expect to have driving lessons from a qualified instructor, with one in two also expecting to have lessons with their parents.

Attitudes Towards Learner Drivers

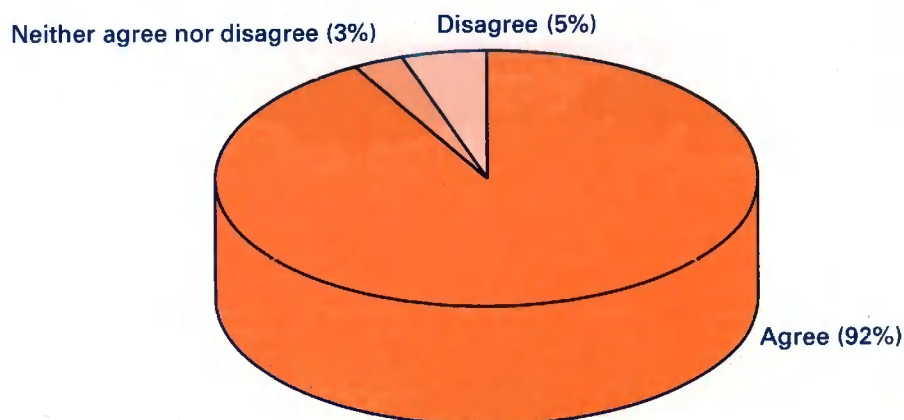
Q “Learner drivers should have to take a **minimum number** of lessons with an Approved Driving Instructor”



Q “Learner drivers should have to obtain a ‘Certificate of Readiness’ from an Approved Driving Instructor before taking a test”



Q “Drivers who have just passed their test should have to take motorway lessons”



Base: All drivers (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

TEENAGERS IN CARS

The main activities of teenagers in cars whilst on long journeys are listening to the car radio/cassette (68%), sleeping (52%), listening to a personal stereo (48%) and reading (37%). About a quarter play observation games such as I-Spy, while one in five map reads for the driver. Over one teenager in six (18%) plays computer games on long car journeys, mostly boys.

Q When you go on long journeys in a car, which, if any, of these to you normally do?



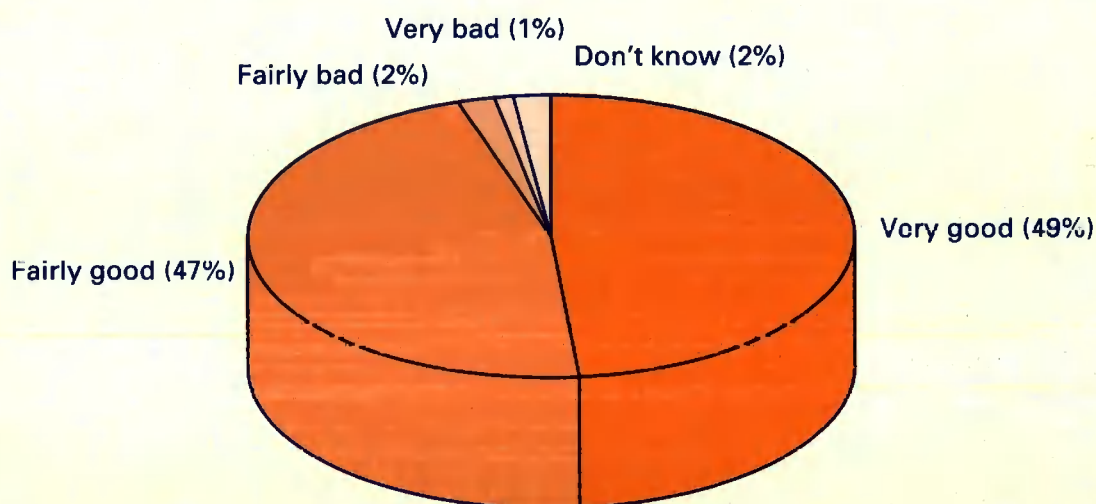
Base: All 13-16 year olds (170)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

TEENAGERS' VIEWS OF PARENTS' DRIVING

Virtually all teenagers think that their parents' driving is good, including half who say it is very good. (The proportion saying very good against those saying fairly good does not vary significantly between teenagers interviewed with their parents in the same room and those who were not in the room). Only 3% rate their parents' driving badly and 2% say they don't know.

Q How good or bad a driver do you think your mother/father is?



Base: All 13-16 year olds (170)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Q Does your mother or father have any annoying habits when driving?

"They argue which way to go" (this came up several times)

"My dad gets uptight too quickly, he gets angry with other drivers"

"Dad sometimes steers with his knees"

"Mother brakes too heavily"

"Mum always uses the choke a lot making the car sound loud"

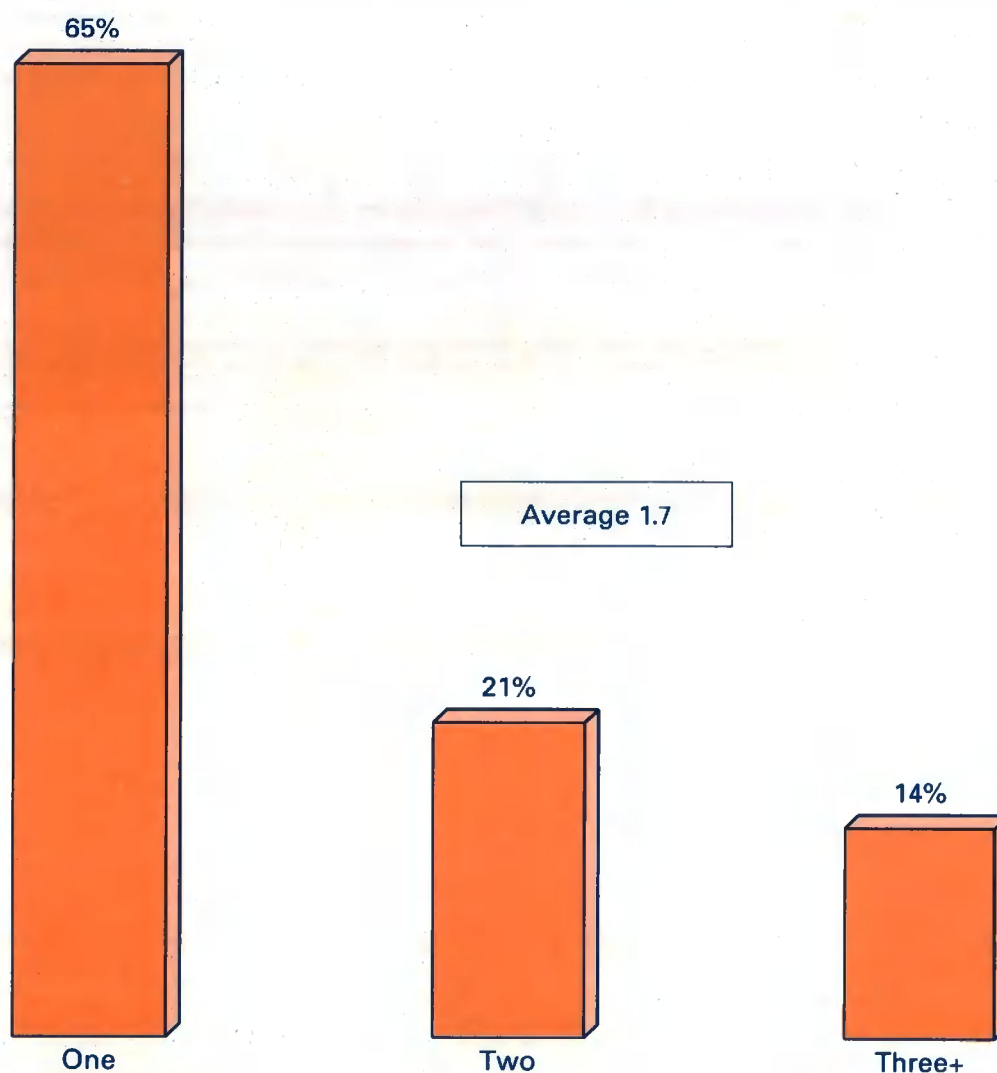
"Dad puts his hands on Mum's knee"

"He constantly listens for rattles in the car"

CONTINENTAL TRAVEL

Just 11% of drivers, or 2.8 million, have taken their car on the Continent in the last year, mostly just once. This would gross up to a total number of visits of around 4.8 million compared with 3.2 million in 1992.

Q On how many trips, if any, have you taken your car on the Continent in the last year?



Base: All those who have taken their car on the Continent in the last year (221)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

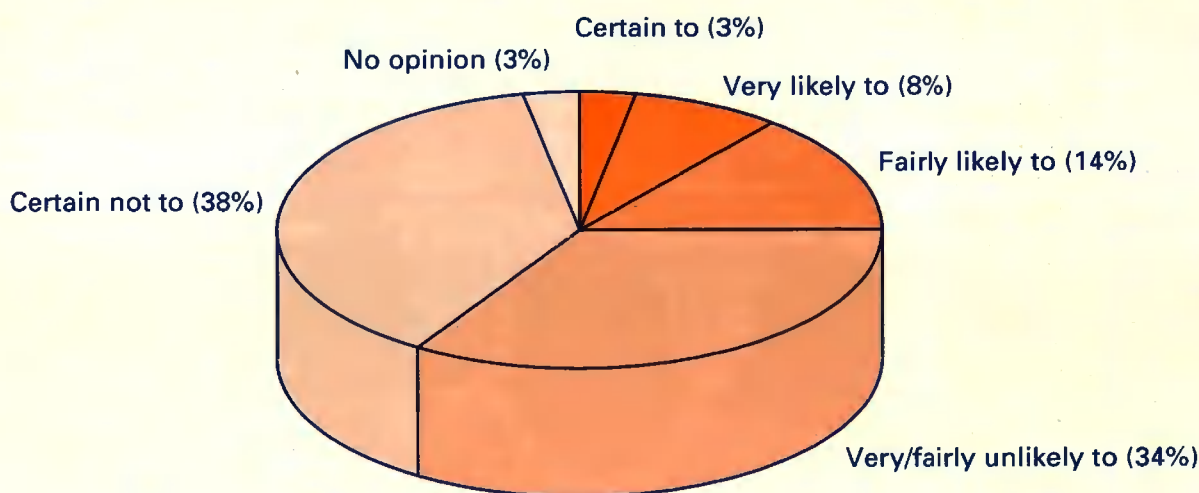
THE CHANNEL TUNNEL

If the Channel Tunnel were to open today just 3% say they would be 'certain' to use it in the next year or so, while a further 22% would be very likely (8%) or fairly likely (14%) to do so. This represents a very slight increase since the 1992 survey but still represents a low level of commitment to using the Tunnel considering it is now close to opening.

Those who say they would be certain to travel indicate a willingness to make an average of 2.4 journeys per year – markedly up on previous years. This would gross up to around 1.7 million return journeys per year, although is based on a fairly small sample of respondents.

Only 40% of those who have taken their car on the Continent in the last year say they would be likely to use the Tunnel within the next year if it was open today, and only 8% said they would have been certain to. However, this does not necessarily mean they would have used an alternative means of crossing – they may not have travelled with their car at all.

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



Base: All drivers (1,720)

	Trends					
	1988	1989	1990	1991	1992	1993
	%	%	%	%	%	%
Certain to	6	5	4	4	3	3
Very likely to	11	8	8	9	7	8
	} 17%		} 12%		} 10%	
	} 13%		} 13%		} 11%	

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

	1989	1990	1991	1992	1993
Average number of journeys	2.6	2.2	2.2	1.5	2.4
Total return journeys per year	2.8m	2.0m	2.0m	1.4m	1.7m

Base: Certain to travel (55)

Source: Lex Report on Motoring 1994, The Consumer View/MORI



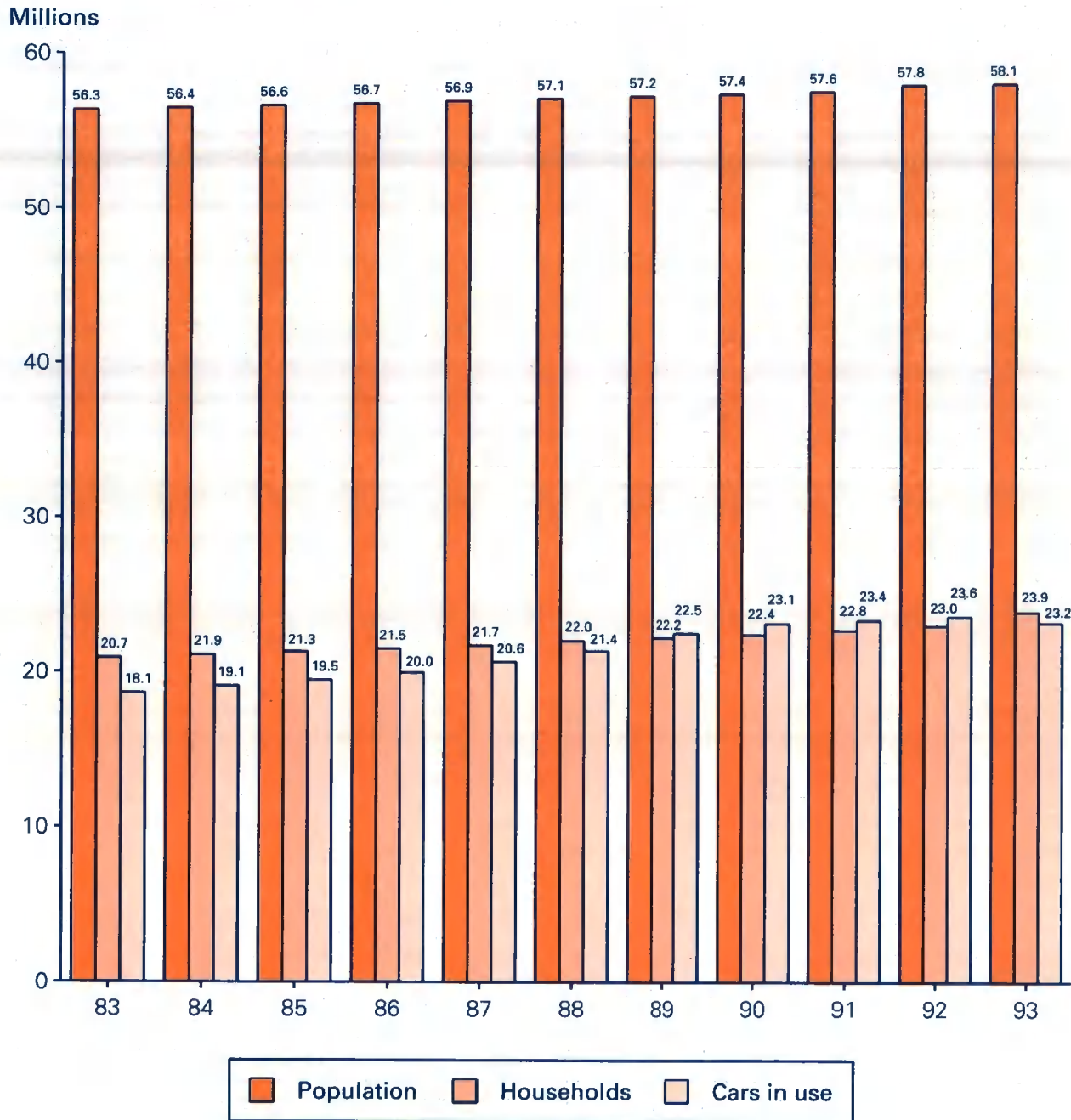
1994 LEX REPORT ON MOTORING – The Consumer View



MOTORING STATISTICS
STATISTICAL PROFILES
ADDITIONAL DATA

UK Car Ownership I

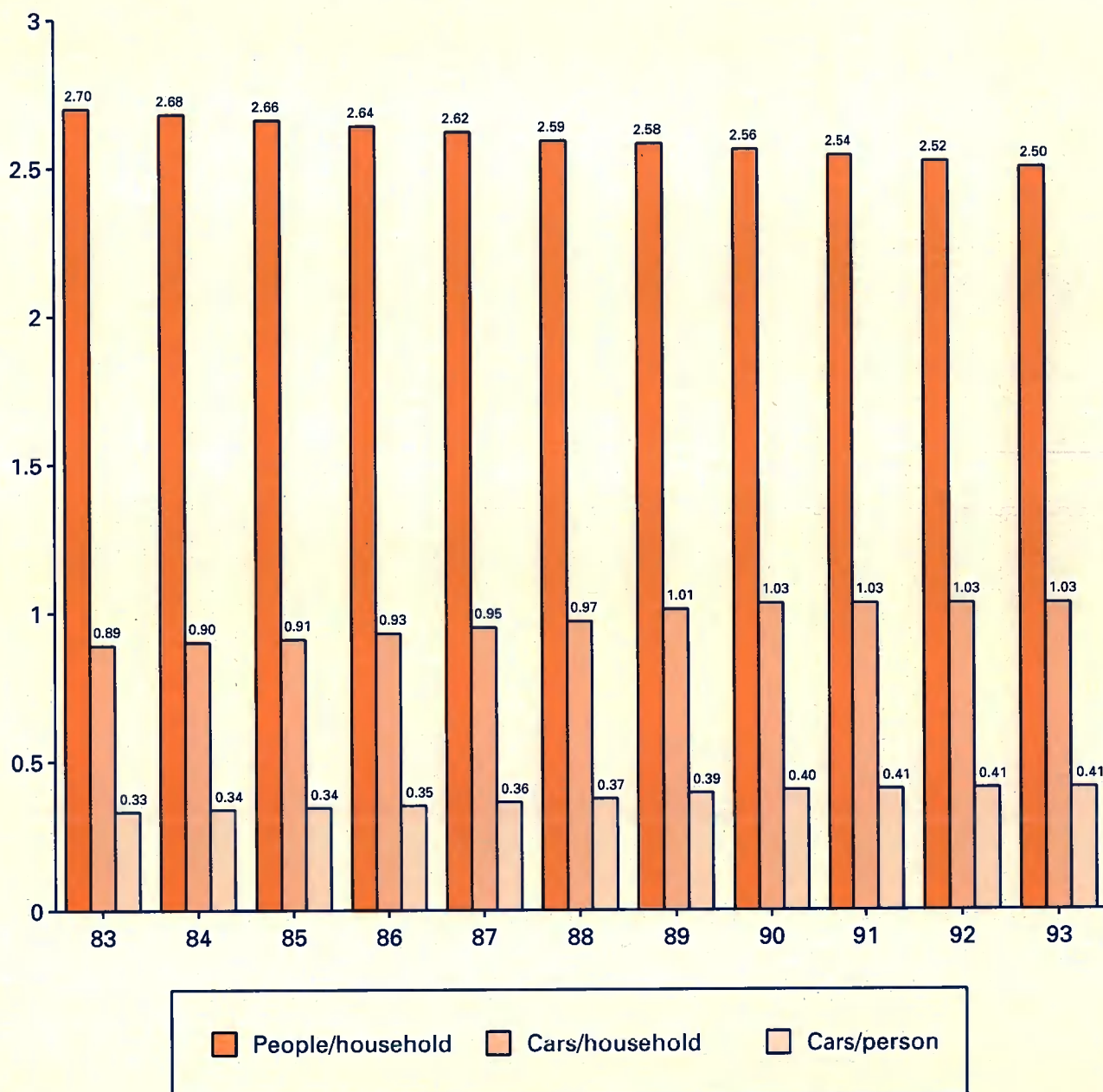
Over the past ten years, the population of the UK has risen by 3%, the number of households by 11%, while the number of cars in use has grown by 28%.



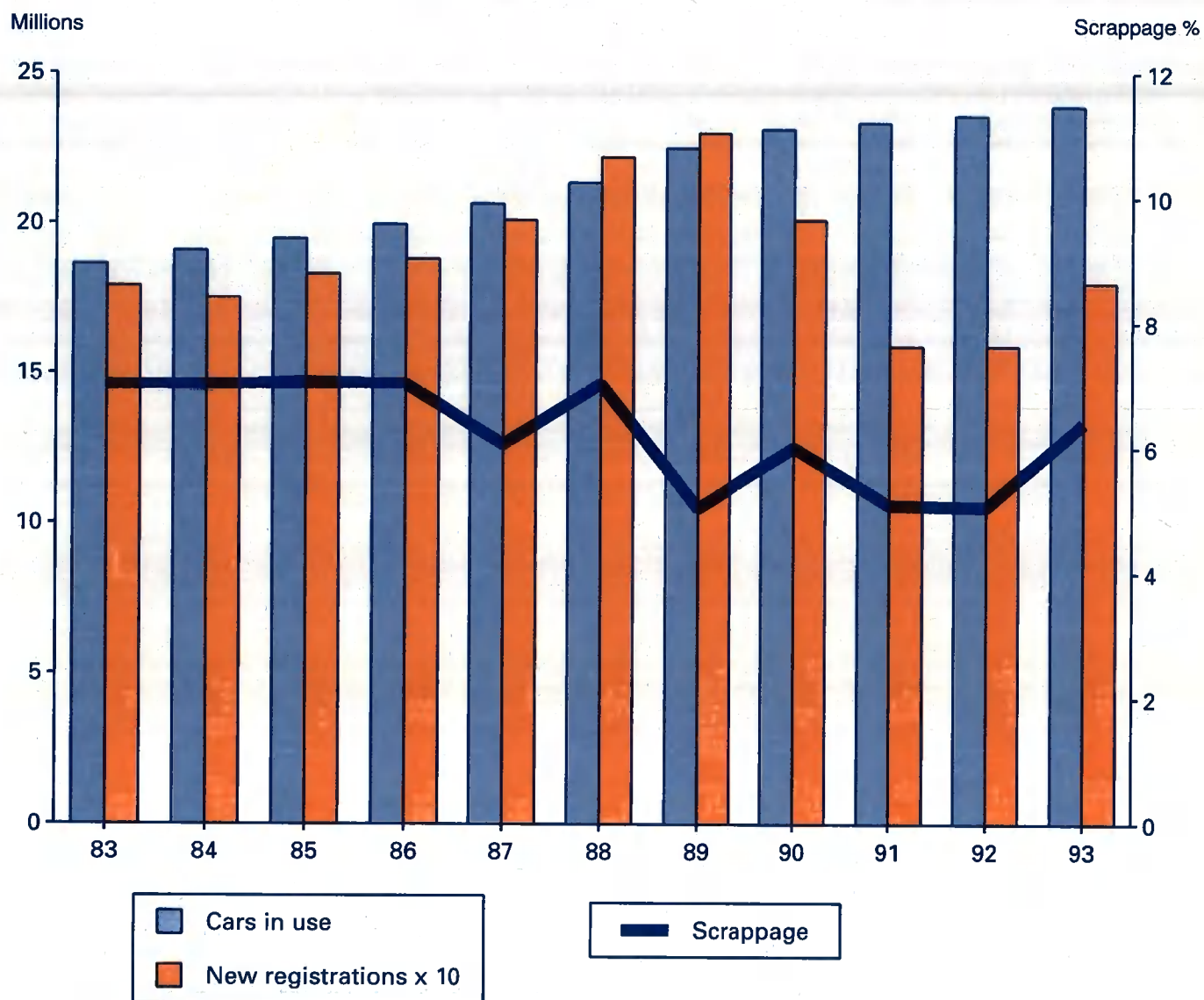
Source: SMMT for cars in use including lapsed vehicles, DoE for households, Govt Actuary for population

UK Car Ownership II

The average size of households has fallen by 7% over the past 10 years but the ownership of cars per household and per person have risen by 16% and 24% respectively.

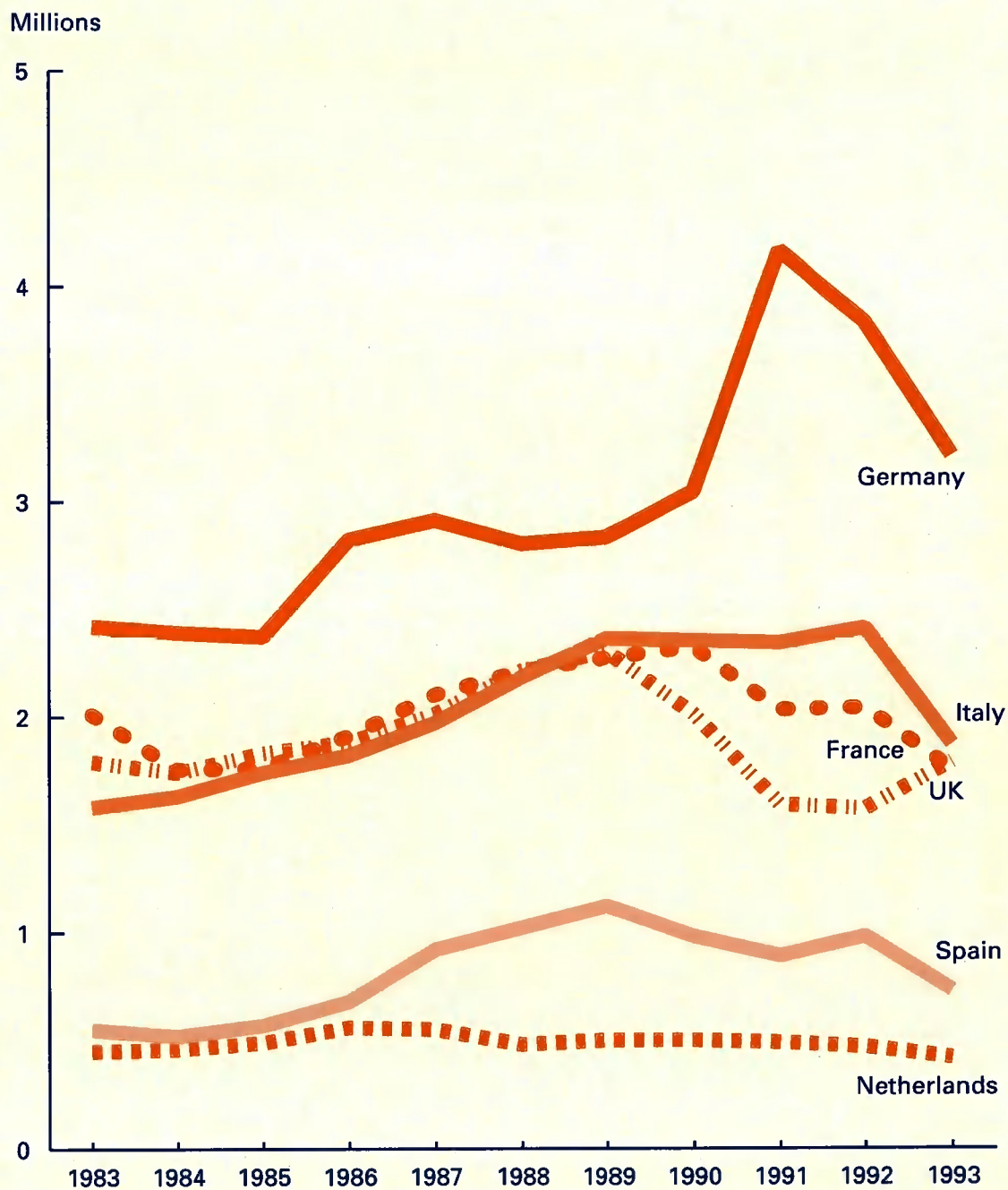


Scrappage of Cars in the UK



Source: SMMT

Registrations of New Cars

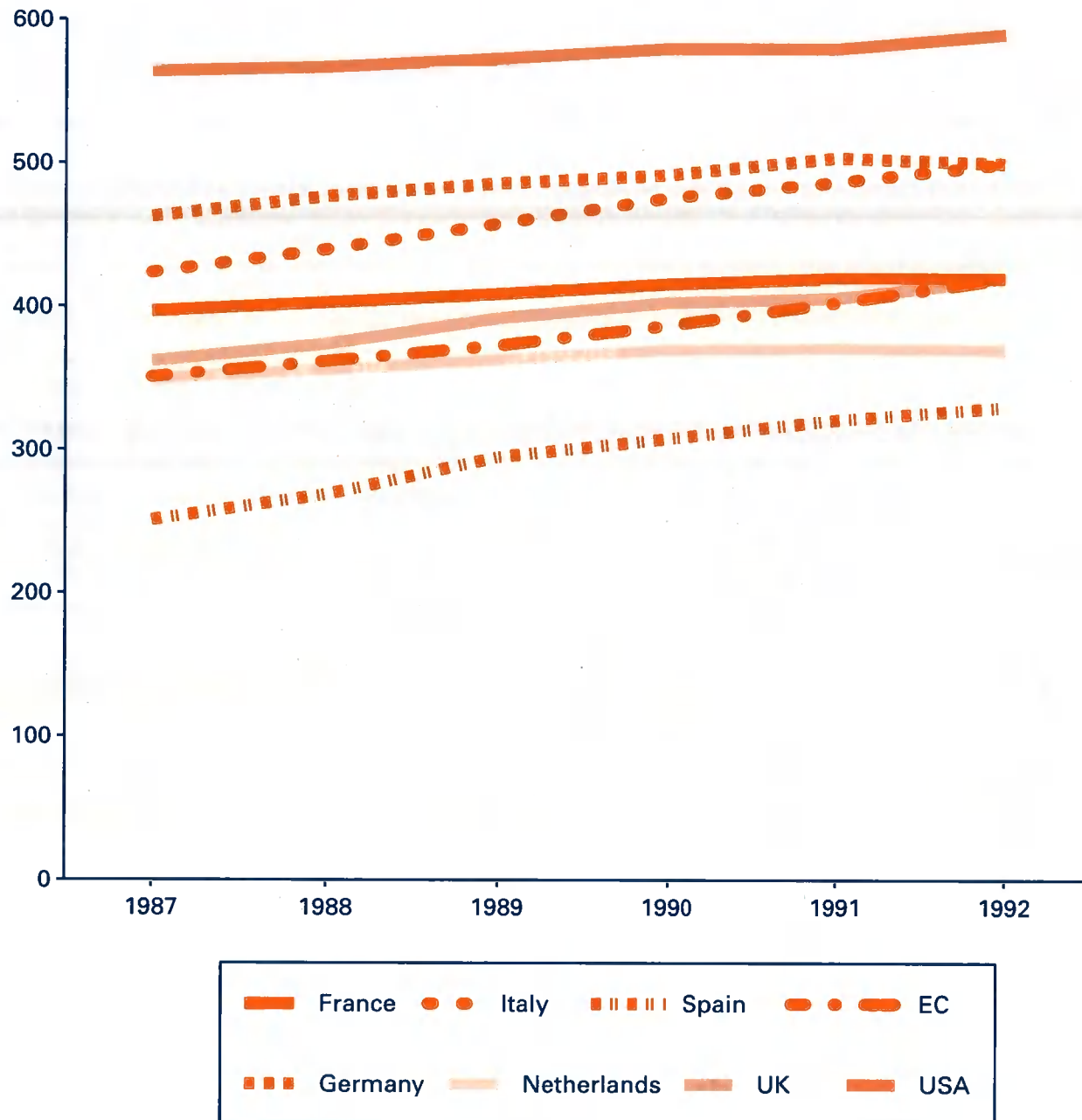


1983-1990 – W. Germany only

Source: SMMT from local statistics

Car Ownership

Cars per '000 population



Source: SMMT/Transport Statistics

Registration of New Cars in the UK by Manufacturer

Market Shares %	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
Audi Volkswagen (VAG)	5.52	5.67	5.80	5.37	5.45	5.55	5.76	5.56	5.22	4.72
BMW	1.47	1.83	1.91	1.86	1.93	2.13	2.14	2.43	2.55	2.30
Citroen	1.40	1.50	1.83	2.29	3.02	2.89	3.03	3.36	4.04	4.54
Fiat	2.72	2.97	3.28	3.41	3.39	3.05	2.74	2.18	1.95	2.41
Ford	27.83	26.50	27.38	28.81	26.35	26.45	25.25	24.24	22.17	21.46
GM/Vauxhall	16.17	16.56	15.11	13.45	13.70	15.21	16.08	15.62	16.70	17.09
Honda	1.08	1.04	1.09	1.23	1.21	1.17	1.58	1.77	1.68	1.74
Hyundai	0.29	0.28	0.40	0.45	0.51	0.37	0.35	0.50	0.59	0.52
Jaguar	0.43	0.44	0.40	0.55	0.65	0.62	0.53	0.36	0.35	0.35
Mercedes	0.83	0.99	1.06	1.08	1.08	1.23	1.32	1.30	1.41	1.19
Nissan	6.08	5.76	5.84	5.67	6.08	6.02	5.32	4.03	4.66	5.02
Peugeot/Talbot	4.00	4.02	4.60	5.03	5.72	6.04	6.16	7.26	7.78	8.02
Renault	3.42	3.85	3.68	3.91	3.86	3.83	3.36	3.99	4.59	5.24
Rover	17.84	17.90	15.80	14.99	15.01	13.57	14.01	14.40	13.51	13.38
Saab	0.50	0.46	0.55	0.52	0.48	0.53	0.59	0.58	0.62	0.51
Toyota	1.87	1.89	1.90	1.90	1.80	1.84	2.12	2.59	2.65	2.93
Volvo	3.38	3.25	3.66	3.52	3.63	3.55	3.29	2.94	2.71	2.46
Others	5.46	5.37	6.11	6.41	6.64	6.32	6.72	7.40	7.41	6.12
Total Market (Million)	1.75	1.83	1.88	2.01	2.22	2.30	2.01	1.59	1.59	1.78

Source: Society of Motor Manufacturers and Traders



Profile of Britain's Car Drivers

	General Public (1992) %	Drivers (1990) %	Drivers (1991) %	Drivers (1992) %	Drivers (1993) %
Sex					
Male	47	59	59	57	58
Female	53	41	41	43	42
Age					
17-24	17	11	11	9	10
25-34	19	26	24	28	28
35-54	30	40	39	36	39
55-64	15	11	13	14	12
65+	19	12	13	13	11
Class					
AB	18	26	25	23	28
C1	23 }41	27 }52	28 }53	28 }51	28 }56
C2	28	31	29	29	24
DE	31 }59	17 }48	18 }47	20 }49	20 }44
Lifestyle					
Young, single male, no children (17-24)	5	4	4	4	3
Young, single female, no children (17-24)	3	2	2	1	1
Married, no children in h/h (17-44)#	10	10	12	12	11
Married, children under 16 (17-64)#	26	40	37	39	33
Empty nesters (45-64)	19	18	19	20	22
Others	37	26	26	25	29

includes other couples

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Driver Profile by Region

(Don't knows excluded)

	All drivers (1720) %	Scotland/ North (623) %	Midlands (285) %	London (234) %	South East/ East Anglia (348) %	Wales/ South West (230) %
Sex						
Male	58	58	56	58	57	59
Female	42	42	44	42	43	41
Age						
17-24	10	11	10	7	10	10
25-34	28	27	28	31	28	26
35-54	39	38	36	45	40	36
55-64	12	13	13	8	11	17
65+	11	11	13	9	11	11
Mainly Drive						
Private Car	90	92	92	83	87	92
Company Car	9	7	8	14	12	8
Someone else's Company Car	1	1	0	3	1	0
No. of Cars Owned						
One	58	62	55	60	51	59
Two+	42	38	45	40	49	41
Car Driven Most Often Bought . . .						
New	31	32	31	31	32	27
Used	69	68	69	69	68	73
Miles Driven per Year						
0-6000	28	25	35	30	28	27
6001-20,000	62	66	57	62	60	63
20,001+	10	9	8	8	12	10
Average miles	10,600	10,700	9,700	10,100	11,400	10,700

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Profiles of Driver Types I

(Don't knows excluded)

	All (1720) %	Male (1045) %	Female (675) %	17-24 (162) %	65+ (173) %	London (234) %
Car Driven Most						
Bought new	31	34	27	21	45	31
Bought used	69	66	73	79	55	69
Engine Size						
Up to 1400cc	44	37	54	57	65	37
1401-2000cc	49	54	41	39	33	50
Over 2000cc	7	9	5	4	2	13
Age of car						
Up to 3 years	30	32	26	22	25	25
Over 3 to 6 years	30	30	29	24	28	35
Over 6 years	40	38	45	54	47	40
Bought						
Privately	90	86	95	95	97	83
Provided by own employer	7	10	2	3	1	10
Bought as business expense (Total Company)	2 (9)	3 (13)	1 (3)	* (3)	1 (2)	4 (14)
Other employer/business expense	1	1	2	2	1	3
Expected length of ownership Years						
Average	4.2	4.2	4.2	3.0	6.3	4.6
Miles Car Driven Miles						
Average	10,600	12,100	8,500	11,300	6,300	10,100
Cost of Car						
Average	£5,500	£6,000	£4,900	£3,000	£5,500	£6,100

Based on car driven most often.

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Profiles of Driver Types II

(Don't knows excluded)

		Normally drive:		Car driven most often:	
	All	Private	Own	Bought	Bought
	(1720)	Car	Company	New	Used
	%	(1368)	Car	(616)	(1092)
		%	(320)	%	%
Base:					
Car Driven Most					
Bought new	31	26	76	100	0
Bought used	69	74	24	0	100
Engine Size					
Up to 1400cc	44	48	12	44	45
1401-2000cc	49	46	71	49	48
Over 2000cc	7	6	17	7	7
Age of Car					
Up to 3 years	30	25	72	68	12
Over 3 to 6 years	30	31	20	21	34
Over 6 years	40	44	8	11	54
Bought					
Privately own	90	100	0	76	97
Provided by own employer	7	0	75	19	1
Business as own business expense	2	0	25	3	2
(Total Company)	(9)	(0)	(100)	(22)	(3)
Other employer/business expense	1	0	0	2	*
Expected Length of Ownership	Years				
Average	4.2	4.3	3.0	4.2	4.2
Miles Car Driven	Miles				
Average	10,600	9,500	21,100	12,500	9,700
Cost of Car					
Average	£5,500	£4,900	£11,800	£9,800	£3,700

See p130 for information on cars

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Profiles of Britain's Cars

(Don't knows excluded)

				Company Cars			
	Cars (2,611) %	Bought new (868) %	Bought used (1,728) %	Private (2,136) %	All Co. Cars (453) %	Provided by an employer (328) %	Business expense (125) %
Base:							
Bought new	30	100	0	24	74	86	44
Bought used	70	0	100	76	26	14	56
Engine Size							
Up to 1400cc	46	44	46	49	16	14	22
1401-2000cc	46	48	46	44	65	69	52
Over 2000cc	8	8	8	7	19	17	26
Type of Ownership							
Bought privately	89	73	96	100	0	0	0
Provided by an employer	8	22	2	0	73	100	0
Business expense	3	4	2	0	27	0	100
Age of Car							
0-3 years	30	67	13	24	70	81	42
3-6 years	29	22	33	30	24	17	41
Over 6 years	41	11	54	46	6	2	17
Mean Age (years)							
1993	5.5	2.8	6.6	5.8	2.5	2.0	4.0
1992	5.4	2.8	6.6	5.8	2.7	2.0	3.9
1991	5.4	2.9	6.5	5.8	2.6	2.1	3.6
1990	5.2	2.7	6.6	5.7	2.4	1.7	3.8
1989	5.0	2.4	6.2	5.4	2.0	1.6	2.9
1988	5.2	2.6	6.5	5.6	2.3	1.7	3.5
Six Year Trends							
1993	100	30	70	89	11	8	3
1992	100	30	70	88	12	8	4
1991	100	30	70	86	14	9	5
1990	100	34	66	86	14	9	5
1989	100	33	67	86	14	10	4
1988	100	33	67	87	13	9	4

This table gives information about the cars in the household (up to a maximum of 3 per household)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

ADDITIONAL DATA

Q How strongly do you agree or disagree with the following statements

	Strongly agree %	Tend to agree %	Neither agree or disagree %	Tend to disagree %	Strongly disagree %	No opinion Don't know %	Net agree %
The Importance of The Car							
1. I would find it very difficult to adjust my lifestyle to being without a car (Base: all motorists – 1,720)	55	27	4	10	3	1	+69
2. I would use my car less if public transport were better (Base: all motorists – 1,720)	15	24	7	32	21	1	-14
3. Cars are essential for everyday living (Base: all motorists – 1,720)	38	46	7	7	1	1	+76
4. Cars are essential for everyday living (Base: all 13-16 year olds – 170)	32	48	7	11	1	2	+68
5. Congestion is a major problem in this country (Base: all motorists – 1,720)	48	40	6	4	1	1	+83
6. The use of cars should be restricted to protect the environment (Base: all motorists – 1,720)	5	32	19	31	11	2	-5
7. The use of cars should be restricted to protect the environment (Base: all 13-16 year olds – 170)	16	42	19	15	5	3	+38

Source: Lex Report on Motoring 1994, The Consumer View/MORI

1994 LEX REPORT ON MOTORING – The Consumer View

Strongly agree	Tend to agree	Neither agree or disagree	Tend to disagree	Strongly disagree	No opinion Don't know	Net agree
%	%	%	%	%	%	%

Drinking and Driving

8. Everyone who is caught with more than the legal limit of alcohol in his/her blood should receive a prison sentence (Base: all motorists –1,720)	21	24	11	32	10	1	+3
9. The legal drink/drive limit should be reduced to no alcohol at all (Base: all motorists –1,720)	48	25	6	16	5	1	+51
10. The legal drink/drive limit should be reduced to no alcohol at all (Base: all 13-16 year olds – 170)	49	28	9	8	4	1	+65

Learning to Drive

11. Learner drivers should have to obtain a "Certificate of Readiness" from an approved driving instructor before taking a test (Base: all motorists –1,720)	30	42	11	13	3	1	+56
12. I want to learn to drive as soon as I am 17 (Base: all 13-16 year olds – 170)	70	17	6	5	1	1	+80
13. I think the minimum age at which you can drive should be 18 rather than 17 years old (Base: all 13-16 year olds – 170)	9	11	13	32	33	3	-45

Buying a Car

14. I am interested in cars (Base: all motorists –1,720)	23	32	16	21	8	1	+26
15. I am interested in cars (Base: all 13-16 year olds – 170)	27	36	16	15	6	1	+42
16. I like to buy from a well-known manufacturer (Base: all buying car from dealer in last two years – 529)	23	48	13	11	3	2	+47

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Youth Activities and The Use of The Car

Q Which of these activities do you do these days?

Q Do you usually travel in a car or by some other way?

	% doing All (170)	All (170)	% using car Boys (83)	Girls (82)
Going to school/college	96	33	42	25
Going to work	14	33	9	71
Going to youth club, scouts, guides	30	77	74	79
Playing sports	68	50	58	40
Go to see films, sports etc.	65	68	74	61
Go shopping	70	60	70	53

Base: All children, those doing activity

Use of Motorway

Q When you are driving on a motorway and traffic is free flowing and the weather is good which do you usually do?

	Total (1,720)	Men (1,045)	Women (675)	Young single male (86)	Drive >20,000 miles (223)	London (234)	Private (1,349)	Company (362)
	%	%	%	%	%	%	%	%
Never drive on motorway	7	2	13	6	2	2	7	2
Stay in inside lane	6	5	7	2	3	9	6	3
Drive in inside lane and overtake occasionally	45	45	44	28	35	30	46	33
Mainly drive in middle lane and overtake occasionally	34	37	31	43	39	44	33	43
Mainly drive in fast lane	7	9	5	17	19	13	6	18

Base: All motorists (1,720)

Q When making a journey for personal driving or driving to work, do you use a relatively uncongested motorway or a normal road which is fairly congested?

	Total (1,720)	Men (1,045)	Women (675)	% using normal road 65+ (173)	Drive <6000 miles (420)	Private (1,349)	Company (362)
	%	%	%	%	%	%	%
20 mile journey	16	11	23	29	27	17	8
80 mile journey	8	5	11	12	14	8	2
200 mile journey	6	3	9	11	12	6	1

Base: All motorists (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Motorway Tolls

Q Supposing you had to pay a toll to go on the motorway, what is the maximum you would be prepared to pay?

	Journey for personal driving or journey to work		
	20 miles (1,410)	80 miles (1,514)	200 miles (1,530)
	<i>Sample 10 mm</i> %	%	<i>Sample 20 mm in 2 hours</i> %
Nothing	59 58	43	45 37
£1	31 25	15	30 8
£2	4 11	13	13 9
£3	1 3	10	3 6
£5	3 3	14	1 19
£10	*	5	6 13
£15	0	*	2
£20	0	*	3
No opinion	3 1	2	3 2

Base: All who would use motorway

	Work related journey		
	20 miles (336)	80 miles (357)	200 miles (357)
	%	%	%
Nothing	40	28	27
£1	28	11	5
£2	14	14	7
£3	6	10	5
£5	5	17	16
£10	1	10	18
£15	0	1	7
£20	2	2	10
No opinion	4	6	6

Base: All who would use motorway

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Driving Offences

Q Which of the following have you done in your car in the past 12 months?

	Total	Men	Women	Young single male	Drive >20,000 miles	Private	Company
	(1,720) %	(1,045) %	(675) %	(86) %	(223) %	(1,349) %	(362) %
Exceeded speed limit on normal/main road	61	66	54	77	78	59	76
Exceeded speed limit on motorway	47	59	31	72	79	44	74
Parked illegally	32	37	26	60	48	31	44
Driven through red light intentionally	6	7	4	16	12	6	8
Driven without wearing front seat belt	20	23	16	39	28	20	24
Driven a car whilst over legal alcohol limit	4	5	2	11	8	3	5
None of the above	23	19	30	6	8	25	10

Base: All motorists (1,720)

Speed Cameras

Q How have speed cameras affected your driving along roads where you know there are cameras?

	Total	Men	Women	Young single male	Drive >20,000 miles	Private	Company
	(1,175) %	(765) %	(411) %	(62) %	(200) %	(869) %	(303) %
Drive generally slower	34	33	35	29	38	32	46
Slow down for cameras	27	29	32	38	39	26	34
No difference	39	37	41	33	23	42	20

Base: All aware of cameras (1,175)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Tomorrow's Drivers

Q Thinking of yourself in 10 years' time, if you were to choose a car, what sort of things would you look for in your choice of car?

	Boy (83) %	Girl (82) %
Speed	35	22
Sporty looks	29	26
Cheap to run	36	18
Comfort	17	30
Safety features	23	15
Good stereo	17	21
Cheap to buy	20	13
Good make of car	14	15
Plenty of space	11	16
Certain colour	6	19
Environmentally friendly	10	14
Other	27	22
No opinion	10	15

Base: All 13 - 16 year olds (170)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Paying to drive into towns

Q How often do you drive in . . .

- a) the centre of London?
- b) the centre of any major city in Great Britain?
- c) the centre of any large town and city in Great Britain?

	London	Major cities	Large towns/ cities
	%	%	%
Every day/most days	2	7	19
1-3 times a week	4	11	25
Less than once a week to once a month	4	15	19
Less than once a month	19	34	24
Never	67	29	9
Don't know	5	4	4

Base: All motorists (1,720)

Q To what extent would you support or oppose a scheme whereby car drivers pay £3 per vehicle per day to enter a city centre as a means of reducing congestion, which is linked to improvements in public transport . . .

- a) for London only?
- b) for major cities in Great Britain?
- c) for large towns and cities in Great Britain?

	London	Major cities	Large towns/ cities
	%	%	%
Strongly support	17	11	7
Tend to support	28	28	17
Neither	11	12	14
Tend to oppose	12	18	24
Strongly oppose	21	23	30
Don't know	11	8	7

Base: All motorists (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Features of Cars

- Q Which, if any, of various features of your current car (the one you drive the most) are you happy with?
- Q And which features, if any, would you like to see significantly improved in the next car you get?

	Current – Happy	Next – Improved
	%	%
Driver comfort	70	16
Reliability	68	15
Ease of driving	58	11
Passenger comfort	50	13
Fuel efficiency	49	32
Storage space	36	13
Styling of the car	35	10
Acceleration	29	14
Entertainment systems (stereo, etc)	24	10
Rust/corrosion prevention	23	21
Service intervals	22	6
Top speed	22	6
Safety in an accident	22	37
Environmental friendliness	21	23
Fun of driving	21	5
Security/theft prevention	18	41
Fault indicators	16	13
Length of warranty	14	13
Information on the car's performance	12	6
Communications (eg, telephones)	2	4
None of the above	2	10
Don't know	1	6

Base: All motorists (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Concerns

- Q Which, if any, of various factors do you particularly worry about these days?
- Q Which, if any, do you worry about more now than a few years ago?
- Q Which, if any, do you worry about less now than a few years ago?

	These days %	More worried %	Less worried %
Having my home burgled	55	39	2
Children's safety on the streets	55	38	1
Having my car stolen or broken into	46	30	2
Having my car vandalised	41	24	2
Opening the door to strangers at night	34	21	3
Having an accident in my car	32	12	3
Breaking down on the motorway	31	16	7
Being attacked or robbed on the street	30	23	2
Being attacked or robbed whilst in my car	25	18	2
Driving on my own at night	18	12	5
Driving on the motorway	11	7	11
None of these	7	14	65
No opinion	1	2	5

Base: All motorists (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

Experience of Crime

- Q Which, if any, of these incidents have you experienced in the past two years?
- Q Which, if any, of these have you reported to the police in the past two years?
- Q Which, if any, of these have you reported to an insurance company in the past two years?

	Experienced	Police	Insurance
	%	%	%
My home was burgled	7	7	6
My car was vandalised, but nothing was taken	13	7	5
My car was broken into, and items were stolen	14	11	7
My car was stolen	6	6	6
I was attacked/robbed whilst I was in my car	*	*	*
I was attacked/robbed in the street	1	1	*
Another vehicle hit my parked car (while I was in it)	4	2	3
Another vehicle hit my parked car (while it was empty) and left their details	3	1	2
Another vehicle hit my parked car (while it was empty) but did not leave their details	8	3	3
I had a collision in my car, but no-one was injured	14	5	10
I had a collision in my car, and someone was injured	2	2	2
None of the above	51	66	66
No opinion	1	3	2

Base: All motorists (1,720)

Source: Lex Report on Motoring 1994, The Consumer View/MORI

APPENDIX

STATISTICAL RELIABILITY

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

Research Findings						
	Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total Drivers	1,720	±1	±2	±2	±2	±2
	1,250	±2	±2	±3	±3	±3
	1,000	±2	±2	±3	±3	±3
	500	±3	±4	±4	±4	±4
	200	±4	±6	±6	±7	±7
	50	±8	±11	±13	±14	±14

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

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

Magnitude of Figures Being Compared

	Size of sample being compared	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1993 compared with 1992 base	1,720-2,011	±2	±3	±3	±3	±3
New vs used car drivers	616-1,092	±3	±4	±5	±5	±5
Company vs private car drivers	320-1,349	±4	±5	±6	±6	±6
Other sub-groups	1,500-1,250	±2	±3	±3	±4	±4
	1,000-1,000	±3	±4	±4	±4	±4
	500-500	±4	±5	±6	±6	±6
	500-250	±5	±6	±7	±7	±8
	250-250	±5	±7	±8	±9	±9
	250-100	±7	±9	±11	±11	±12
	100-100	±8	±11	±13	±14	±14

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.

LEX REPORT ON MOTORING

1989-1993 (numbers refer to page in Report)

	1989	1990	1991	1992	1993
BUYING A CAR					
Best time to view a car	59				
Cost of car					73
Changes in car ownership				44	
Commitment to manufacturer					89
Considerations in buying next car			106		
Extra car expectations				42	
Features in current/next car					90
How car is chosen	46				86
Influences on choosing model		90			
Next car purchase new/used			104		70
Numbers buying a car	42	81		81	69
Part exchange				101	74
Reasons for buying car now	44	82			72
Reliability versus durability		92			
Time taken to buy a car					82
Trust of information sources		89			
Used car money back/exchange			102	90	
Who helps choose car	46				
Who makes choice about car	48				
CONGESTION					
Delays due to congestion	70		52	54	
Effects of congestion				58	
Congestion, problem/easing		70	84	56	
Radio traffic reports		72			
CHANNEL TUNNEL					
Channel Tunnel use	40	108	124	124	61
DEALERS					
Attractions of an outlet	52				
Car finance	57	92	94	98	80
Dealers visited	57	86		96	84
Deciding where to buy a car	52		96	86	93
Fixed vs negotiated prices/ bargaining				92	
Personal service when buying a car	55				
Satisfaction with sales experience		88			
Service and parts with car sales				88	95
Single franchise outlets				84	
Source of purchase of car	50	83	92	84	76
Test drives	57	86		96	84
Treatment of women		94			

LEX REPORT ON MOTORING

1989-1993 (numbers refer to page in Report)

	1989	1990	1991	1992	1993
DRIVERS AND THE ENVIRONMENT					
Age passing driving test				51	
Car waiting to be sold					32
Costs of owning car		36			
Difficult to adjust lifestyle	16	34		48	62
Don't care what car I drive	16			48	65
Driving to work					48
Free parking					48
Items in car					58
Ownership of household garages				50	
Privatisation of railways					66
Road system satisfaction	34				
Role of car					65
Use of car	12				
Would use public transport more	16	34	68	72	66
DRIVING					
Best drivers – men or women	18				
Causes of anger/stress			56		
Causes of anxiety			54		
Coping with problems	14				
Motorways		74			
Pleasure of driving			50		
Provision for cyclists/ pedestrians		77			
Road signs		76	60		120
Standard of driving	20				
ENVIRONMENT					
Catalytic converters		52			
Threats to environment	24				
Use of unleaded petrol	26	51	88	66	56
EUROPE					
Buying cars in Europe				100	
Continental trips					60
GENERAL					
Britain's cars	7	40	28	29	30
Car ownership expectations	38	42	36	38	32
Miles driven	9	32	30	32	44
Miles driven (work)		32		32	44

LEX REPORT ON MOTORING

1989-1993 (numbers refer to page in Report)

	1989	1990	1991	1992	1993
LAW					
Attitude towards MOT		59			114
Attitudes towards speed limits		64			
Consumer protection					96
Drinking and driving		62			
Driving misdemeanours		56			
Driving offences					124
Jumping red lights	64				
Law breaking and traffic control		62			126
Misuse of disabled stickers		58			
Speed cameras		62			115
Speed limiters		64			116
Traffic wardens, clamping	32				
Understanding seat belt law				62	
Wheel clamping					117
POLICY					
Car sharing			86		
Driving test, written section					112
Driving test effectiveness		64			
Environment/traffic congestion			74		
Importance of car industry					
Means of traffic control			66		
Non-use of public transport			72		
Park and ride				74	52
Paying for public transport				72	
Petrol tax versus road fund licence		37		71	
Pollution versus congestion			76		
Road pricing				82	
Support for transport policies			78	68	
Taxes on motorists					128
Road tourist signs			67		120
Use of public transport				70	
CAR OWNERSHIP					
Accuracy of mileometers		86			
Car bought new/used	42	81	90	80	68
Car replacement or additional	42			82	
Drivers in household					40
Effect of economic climate			40	46	50
Length of car ownership			35	36	42
New versus used car purchase		84			
Diesel cars					98

LEX REPORT ON MOTORING

1989-1993 (numbers refer to page in Report)

	1989	1990	1991	1992	1993
SAFETY					
Children and seat belts/rear belts		66		60	
Dogs in cars		67			
Factors contributing to road safety		60			
Safety features on car	22				
SECURITY					
Actions against crime	30				
Car theft – car or radio	28				122
Night time parking			46		
Security features			44	64	
SERVICING					
Checking service work			120		
Control of servicing		101			
Deciding where to have car serviced		98	118		
Distance to travel for service	61				105
Frequency of servicing and repairs					106
Importance of servicing	61			114	
Rating of garage servicing	65				
Satisfaction with servicing		101	116	118	110
Servicing modern cars					104
Specialist versus franchise dealers	67	102			
Who services car	63	96	112	116	102
TECHNOLOGY					
Car telephones				78	
New technology				76	

LEX REPORT ON MOTORING

Topics covered:

1989-1993

EXPECTATIONS FOR 2001

	1989	1990	1991	1992	1993
All cars unleaded	x				
Petrol sold in litres	x				
Cars banned from city centres	x			x	
Road signs in kilometres	x				
London traffic at walking pace	x				
Most households will have 2 cars	x				
Speed limit raised to 100 mph	x				
Cars will run on electricity	x				
Cars will be computer controlled	x				
M25 will have 4 lanes		x			
Tolls on motorways		x		x	x
Cannot drive into city centres		x			
No car with engine over 2000cc		x	x		
Fax standard in cars		x		x	
Channel Tunnel not completed		x	x		
Cars limited to 70 mph		x			
Tax on petrol rises above inflation			x		
Road fund rises above inflation			x		
No tax advantage for co. car			x	x	x
Speed limited to 80 mph			x		
Electric cars for town driving			x		
On board direction computers			x	x	
Public transport improved locally			x		
Public transport improved nationally			x		
Drive on right			x		
Motorway limit reduced to 60 mph			x		
BR will be privatised				x	
Pay extra to drive into cities				x	
Single highway code in Europe				x	
Tax doubled to encourage economy				x	
Over 65's banned from driving				x	
Multistorey parking on streets				x	
Maximum 1 car per household				x	
Probation for new drivers					x
Airbags will be standard					x
One lane for lorries					x
Second M25					x
Lorries fitted with noise reduction					x
Viable alternative fuel to petrol					x
Work at home via computer					x
Supermarkets will sell new cars					x
All speed limits in Europe					
reduced by 10 mph					x
EC bans company cars					x



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