

1995

Lex Report on Motoring

What drives the motorist?



LEX SERVICE PLC

Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange. Annual sales exceed £1.4 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 120 outlets representing 30 franchises. In addition, Lex has joint venture car retailing operations in France and the US.

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

Our goal is that the Lex name stands for a level of customer service experience that is clearly the best in the motor industry.

Lex serves the needs of motorists with older cars of all makes through over 70 **Lex Autocentres** which offer servicing, MOT testing, and electrical and mechanical repairs.

Lex Service's commercial vehicle businesses represent Foden, Leyland DAF, ERF, Iveco Ford, MAN, Mercedes-Benz and Renault trucks and LDV vans.

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Lex has a controlling interest in **Hyundai Car (UK)** which imports, distributes and markets Hyundai cars in the UK through 160 dealers, six of which are owned by Lex.

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What Drives the Motorist?



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“WHAT’S DRIVING CAR RETAILING?” Henley Centre for Forecasting

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FOREWORD BY THE SECRETARY OF STATE FOR TRANSPORT

I am pleased to welcome the seventh Lex Report on Motoring, which continues to provide a useful insight into the issues of current concern to motorists.

One of the clear messages coming from this report is that people value enormously the freedom and convenience provided by their cars and would be very reluctant to change their lifestyles. Nonetheless it is also evident that more and more motorists consider environmental issues to be important.

We must look therefore for ways of achieving a balance between these two conflicting priorities. Great progress is being made on improving the environmental performance of vehicles through more stringent emission standards and the increasing use of unleaded petrol.

As the demand for travel continues to rise congestion is likely to get worse, and this is a problem for which there is no technical solution. I was therefore interested to see from the report that more people are now prepared to consider measures such as banning cars from town centres.

I would like to congratulate the Lex Group for producing such an informative report and hope that the important work they are doing continues.

DR BRIAN MAWHINNEY



INTRODUCTION

This is the seventh edition of the Lex Report on Motoring, based again on the results of a survey specially conducted for us by MORI. This year's theme is "What drives the Motorist?" and the report looks at British motorists' current behaviour and attitudes as well as looking forward to their vision of motoring in the years to come. We have also probed the views of some of tomorrow's drivers – today's teenagers. The Henley Centre for Forecasting has used the results of the research to look at the state of the UK car market and predict how it will move in the next four years and the effect on car retailing.

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 and also to policy makers and legislators. These are included in the statistical tables which reinforce the value of the Lex Report on Motoring as the prime source of data on motorists in the UK.

Continued demand for cars

The seven years of Lex Reports on Motoring show how the demand for car ownership has now returned to a steady upwards trend having faltered during the recession. Car ownership in 1994 has matched the expectation of two years ago while the demand for extra cars in the next two years remains strong. However, sales of new cars are being affected in the short term by continuing fragile consumer confidence and weak growth in personal disposable income. 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 demand for company cars continues unabated with no signs of any significant reaction to the change in taxation on company cars which came into force in 1994. We are again producing a separate report covering company drivers in depth which will be published later in the year in conjunction with our jointly-owned car leasing company, Lex Vehicle Leasing.

The Henley Centre Forecasts, which are based on a cautious view of the UK economy, show slow but positive growth in new car sales over the next four years. Other forecasters take a more optimistic view of the economy which would lead to more rapid growth in the car market. Only time will tell, but what is clear is that the winner will be the company which provides the highest level of service.

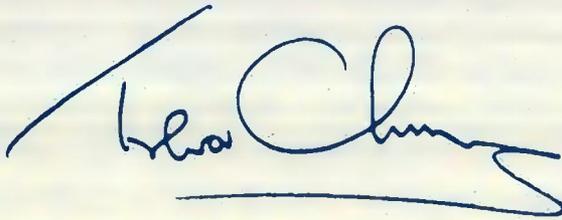
Developing a relationship of trust

The research in the Lex Report on Motoring has consistently shown that motorists are looking for an increasing quality of service when they buy their car or have it serviced and repaired. Customers expect to have their car ready on time, every time, with all the work they requested completed properly first time.

Our goal in Lex is to meet those simple but rigorous service standards throughout the company. We intend to ensure that the name "Lex" stands for trust and value for money and that we lead the way in raising the standards in the car retailing industry in the UK.

We 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 blue ink, appearing to read "Trevor Chinn". The signature is fluid and cursive, with a long horizontal stroke at the end.

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

Basis of the Research

The 1995 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 1,519 drivers in 125 constituency sampling points throughout Great Britain. The sample was boosted to bring the total number of those with their own company car up to 383 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 1 and 24 October 1994.

Terms

Where sub-group bases are given in summary tables 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	312	6
Car bought as respondent's business expense	71	1
	–	–
TOTAL	383	7
 (Car provided by other employer/bought as other's business expense)	 (23)	 (2)

Additional data for the charts are given on pages 127-135.

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.





What Drives the Motorist?

ROLE OF THE CAR IN BRITISH SOCIETY

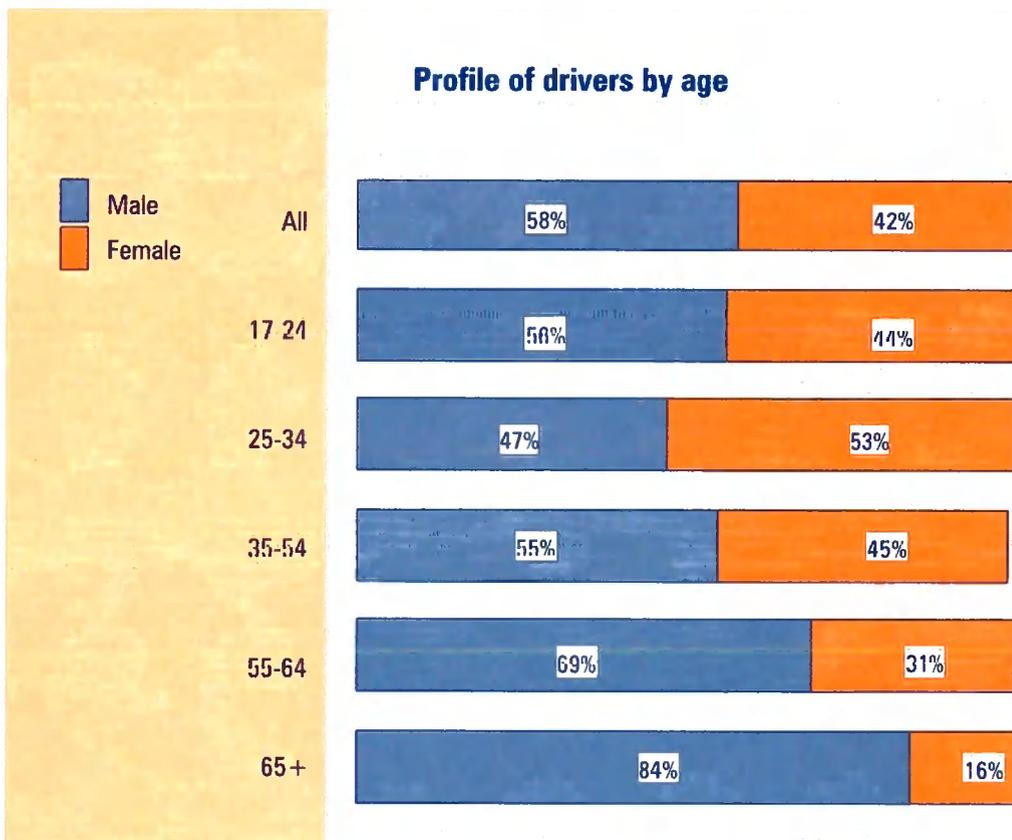
Drivers are changing their attitudes to roads and public transport but show little signs of reducing their driving or giving up the car. They enjoy driving and it enables them to develop their lifestyles in an increasing number of ways. Consequently, expectations for car ownership continue to outstrip current ownership. The number of multiple car households will increase and they will contain different types of cars to meet a wide range of lifestyle and lifestage household needs.

At the same time, motorists are becoming increasingly conscious of the social and environmental impact of the car and coming to recognise that building more roads is not the ultimate solution. The motorist as pedestrian, parent, environmentalist and citizen recognises the need for more controls on the use of the car and the need to improve public transport to help alleviate congestion. However, at present, they do not generally see this diminishing their own use of the car.

Who are Britain's drivers?

There are 26 million regular drivers (driving at least once a month) in Great Britain, 61% of the total population over 17. They are predominantly male.

- 58% of regular car drivers are male – 15.2 million drivers
42% are women – 10.8 million drivers.
- One quarter are aged over 54 but a third are aged under 35.
- While 51% of drivers under 35 are women, this proportion declines steadily with age; just 16% of regular drivers aged over 65 are women.

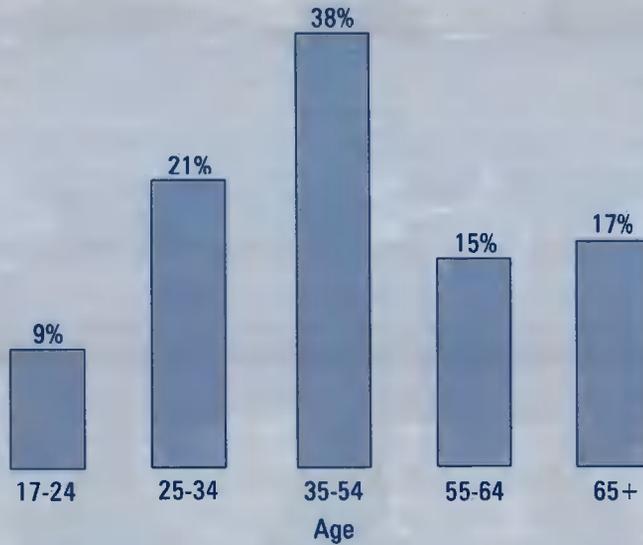


As the higher proportion of women drivers currently under 40 work their way through the population, so the evening up of the balance of the sexes among car drivers on Britain's roads and, by implication, cars, will increase for the next thirty years.

Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

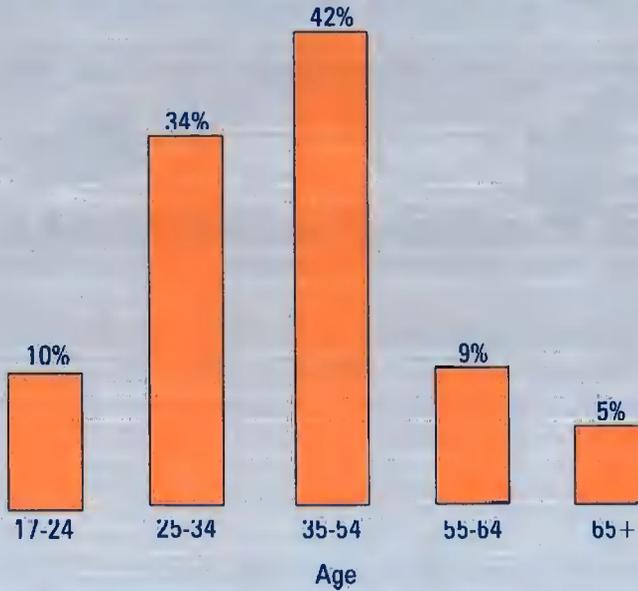
Proportion of men drivers of different ages



No. of men drivers by age:

17-24	1.3 million
25-34	3.2 million
35-54	5.8 million
55-64	2.3 million
65+	2.6 million
Total	15.2 million

Proportion of women drivers of different ages



No. of women drivers by age:

17-24	1.1 million
25-34	3.6 million
35-54	4.6 million
55-64	1.0 million
65+	0.5 million
Total	10.8 million

Base: All drivers (1,519)

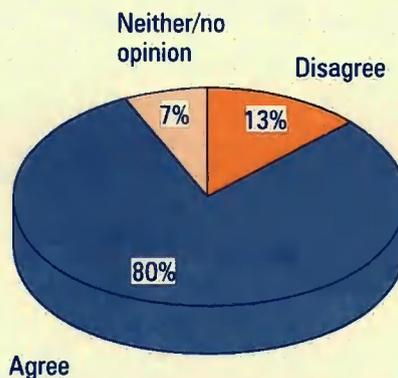
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Do they enjoy their driving?

One thing that drives the motorist is that they genuinely enjoy driving despite increasing congestion.

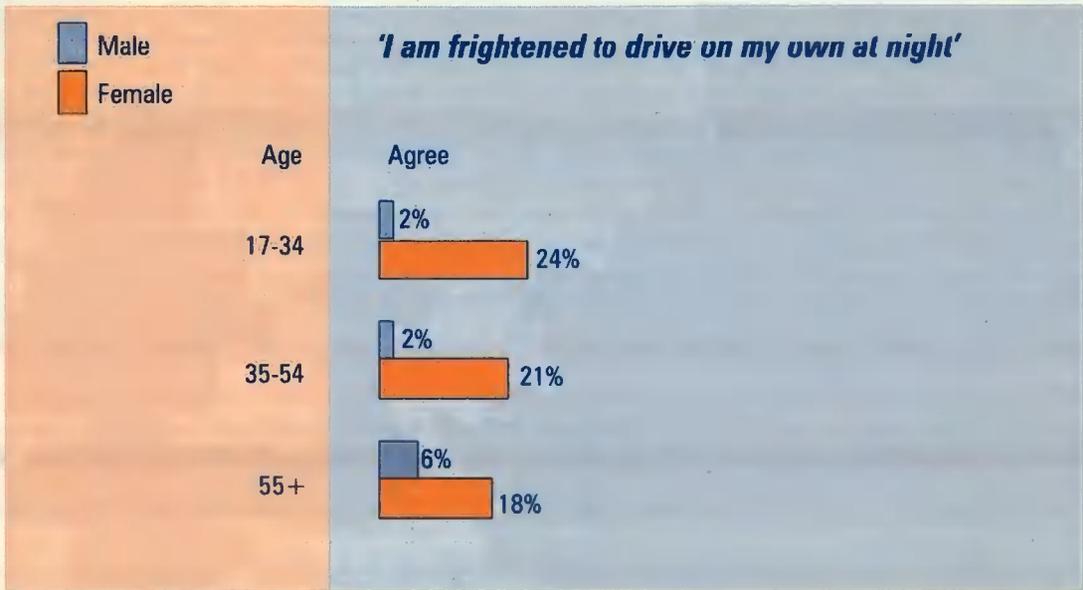
- Four out of five take the view, *'most of the time I enjoy driving'*; only one in eight disagrees.
- More than nine out of ten young drivers say they enjoy driving.
- Those who enjoy driving the least include older drivers and those driving 20,000 miles a year – and drivers in London, of whom a quarter disagree.
- Although most drivers of all types of car say they enjoy driving, those with sports cars like it most while those driving luxury and estate cars, and high mileage drivers enjoy it least.
- One in five female drivers, but hardly any male drivers claim they are frightened to drive on their own at night.

'Most of the time I enjoy driving'



Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

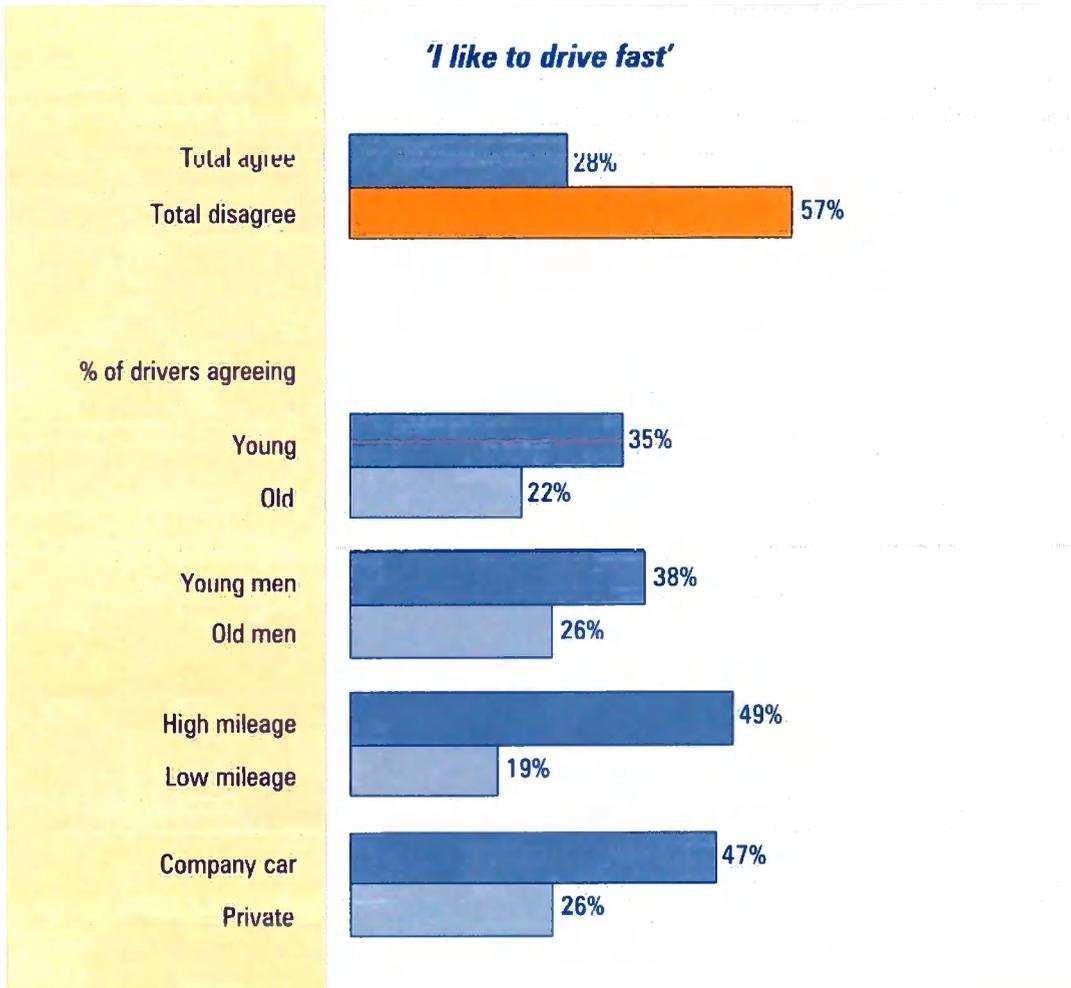


Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Enjoyment does not necessarily equate with speed, although it is more likely to if you are a young driver or drive a company car.

- Three out of five drivers do not like to drive fast and this rises to seven in ten older drivers.
- A third of young drivers and half of all high mileage and company car drivers enjoy driving fast.



A combination of age and marriage appear to reduce enjoyment of fast driving

Base: All drivers (1,519)

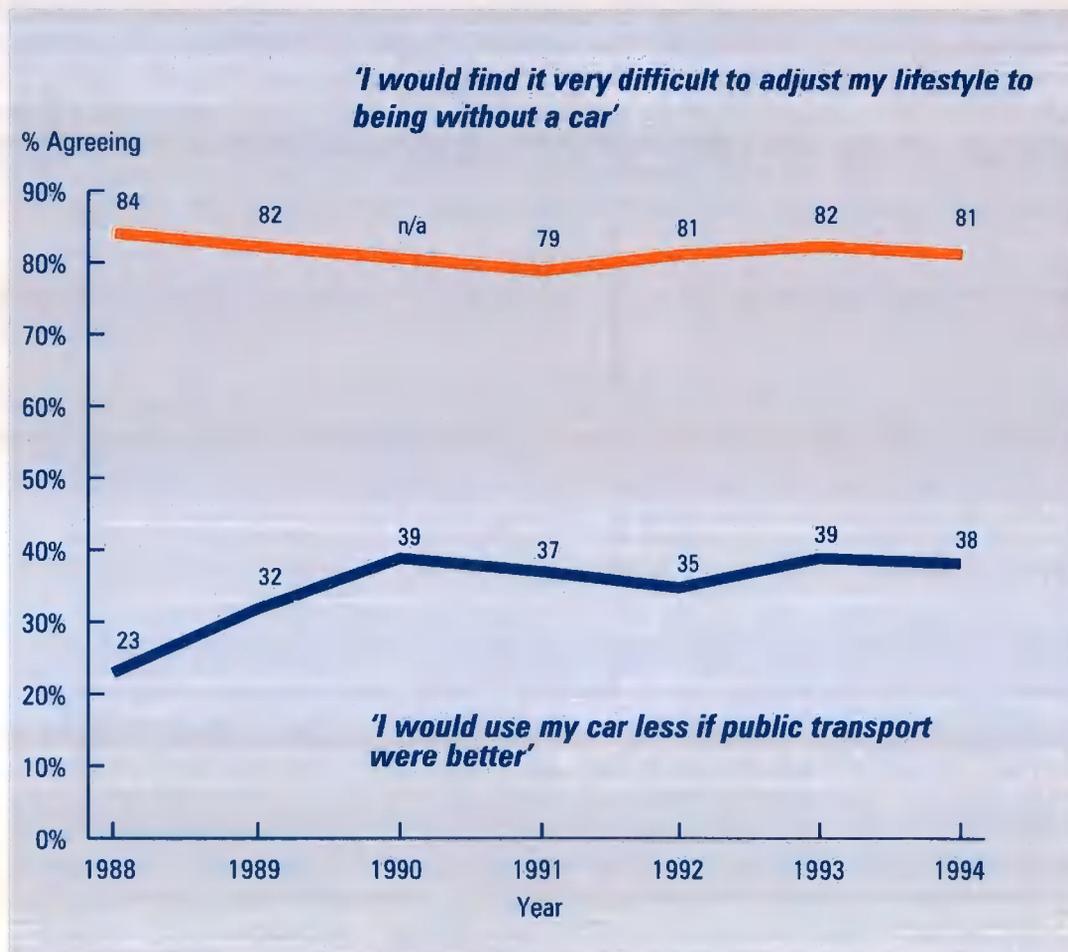
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How do they view public transport?

Drivers show no signs of reducing their dependence on the car or of switching away from the car to public transport. However, it appears that drivers are using *both* their cars *and* public transport for a greater range of journey purposes than six years ago.

- The proportion agreeing with the statement '*I would find it difficult to adjust my lifestyle to being without a car*' has remained around 80% since 1989. This year it is 81%.
- Only a third of drivers, but more than half of those in London, take the view '*I would use my car less if public transport were better*'.
- However, despite the rail strikes of the summer of 1994, and the increasing publicity over rail privatisation, attitudes to actually *using* public transport appear not to have changed significantly since 1990.

Modern lifestyles are demanding the greater use of both cars and public transport



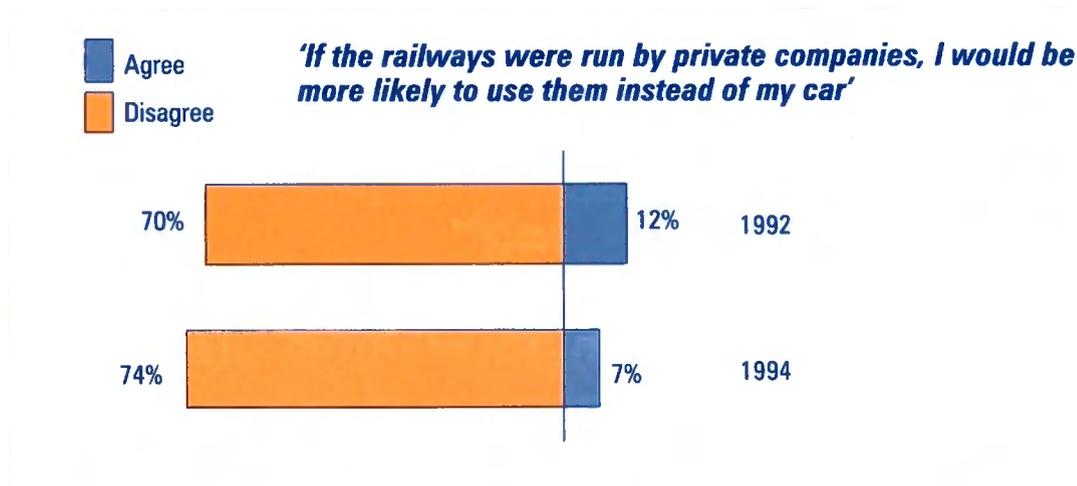
Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

- Over a longer period, we can detect a trend, albeit often slight, towards greater use of both the car and public transport for shopping, visiting family and friends, going to centres of entertainment, holidaying in Britain and going to leisure and sports centres.
- There appears to have been a slight switch in those using public transport for travelling to and from work and a corresponding decline in those using their cars.

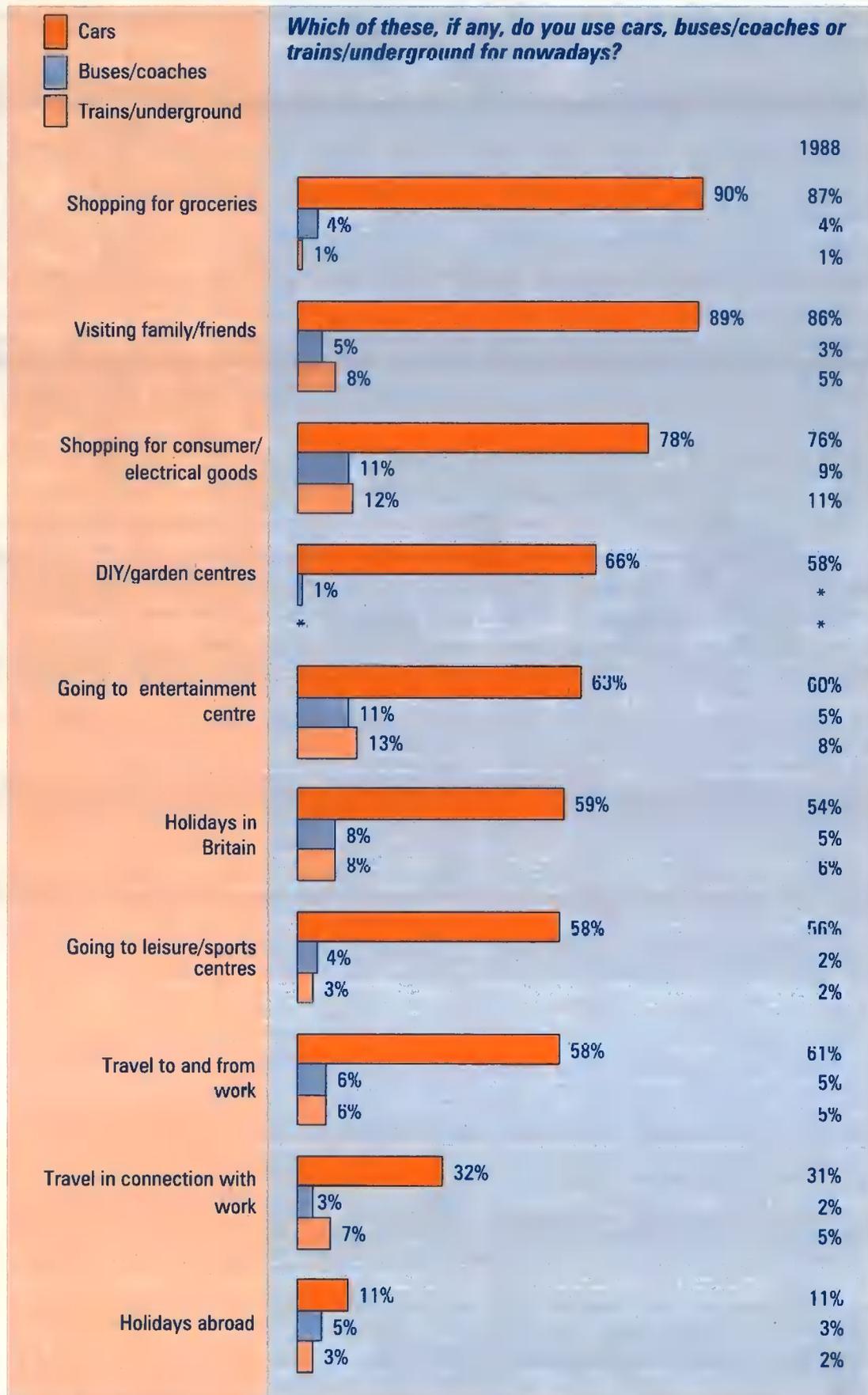
Rail privatisation is not expected to have a significant impact on the use of the car.

- Only 7% believe that if the railways were run by private companies they would be less likely to use their car; 74% disagree.
- Moreover, attitudes have swung more in that direction since the question was last asked in 1993, prior to the 1994 rail strikes.



Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI



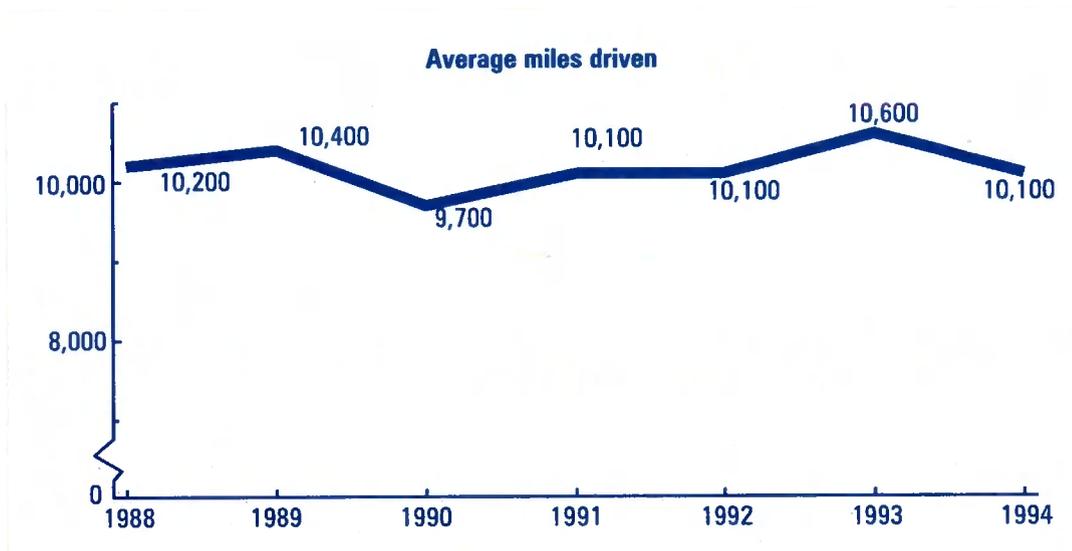
Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How far do they drive?

Britain's drivers estimate that the car they drive most often is driven 10,100 miles a year on average.

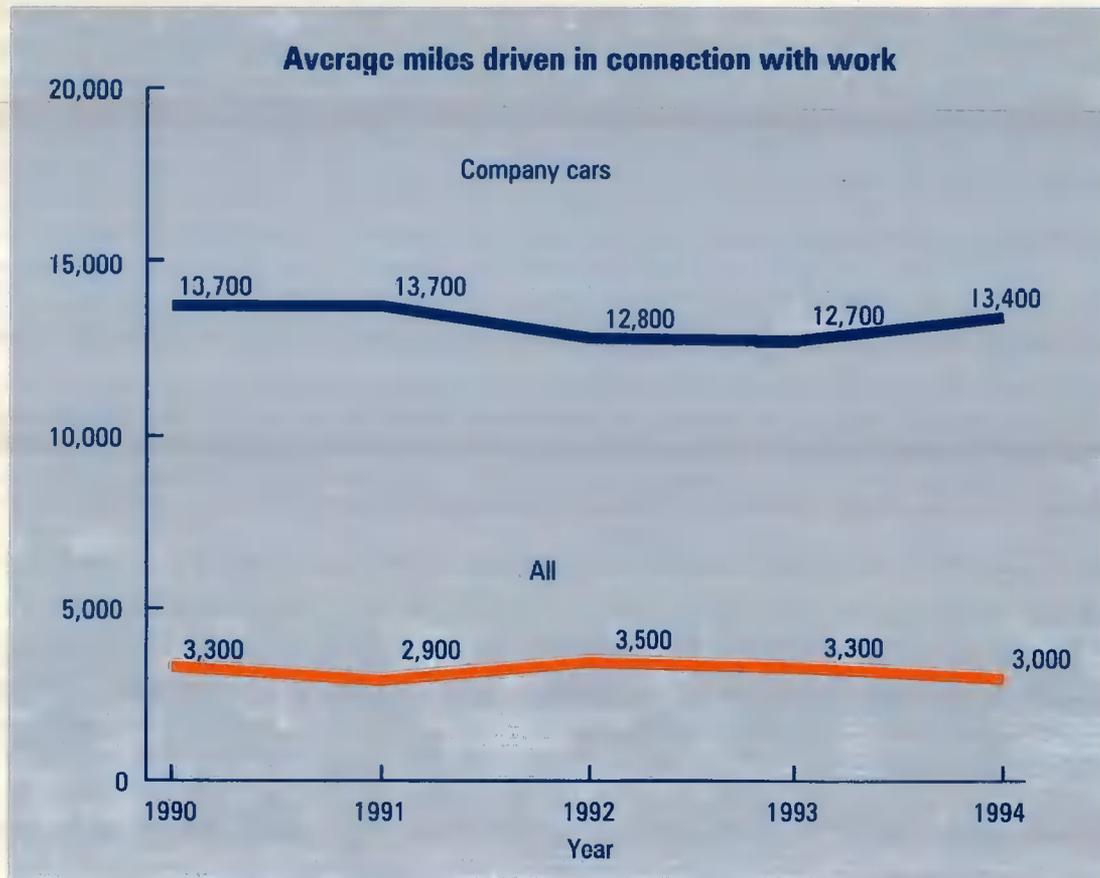
- Three in ten estimate their car does 6,000 miles a year or less, while a quarter do over 12,000 miles a year.



With average annual car mileage relatively stable, increased congestion has to be attributed to more cars on the roads

- The greatest number of miles are driven by men – 11,200 to women's 8,500 miles. Company car drivers do 20,000 miles and those with cars less than three years old do 13,600 miles.





Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

- Driving in connection with work is highest, as one might expect, for those aged 25-54 – around 3,750, a third of their total mileage.
- Company car drivers reckon that an average 13,400 out of the 20,000 miles their cars are driven each year are driven in connection with work *excluding driving to or from work*; owners of private cars also reckon that 1,900 of their average 9,100 miles are driven in connection with work.
- Three in ten company car drivers consider their cars are driven over 18,000 miles a year in connection with work. The proportion who reckon their cars are driven less than 2,000 miles in connection with work has only declined from 9% three years ago to 6% now, suggesting that few drivers have reacted to changes in company car tax in order to cross the 2,500 business mileage threshold.



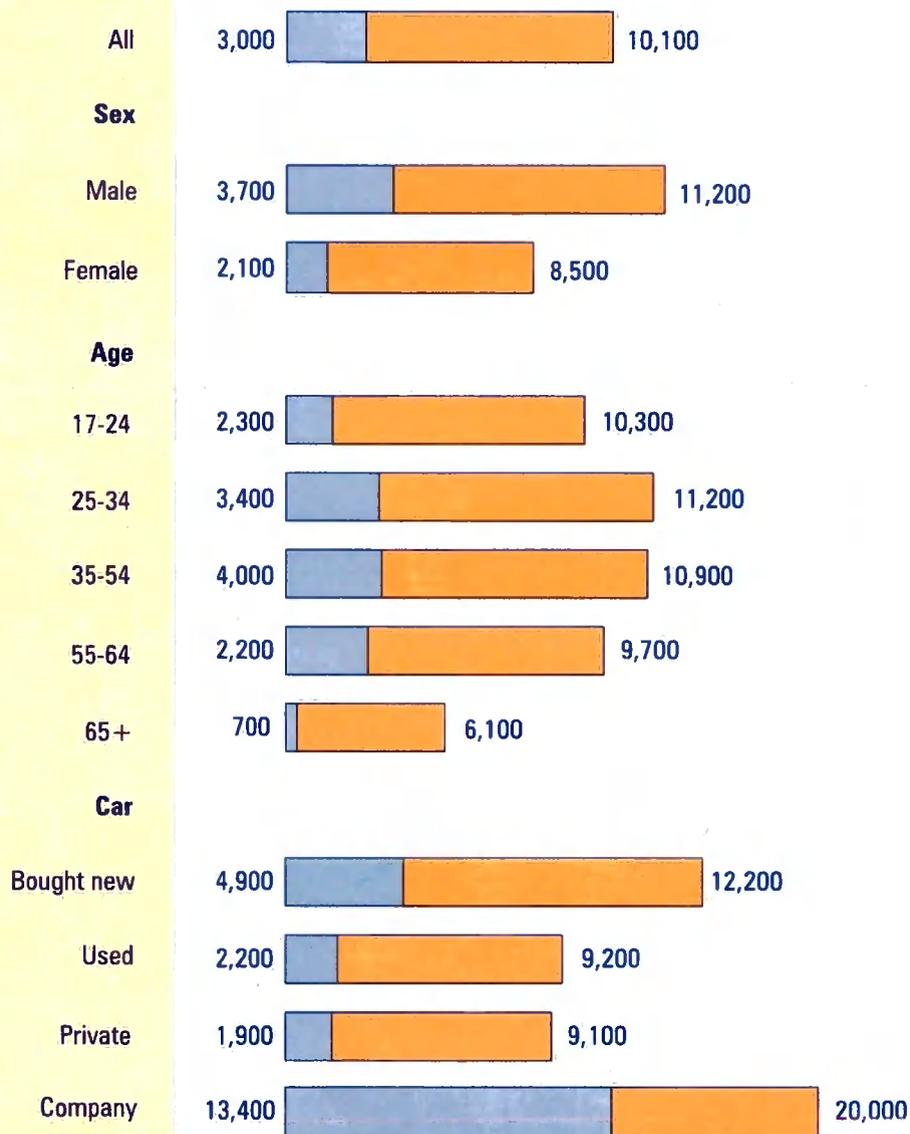
Miles driven

Approximately how many miles is the car driven a year on average?

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)?

 In connection with work

Average miles



Base: All drivers (1,519)

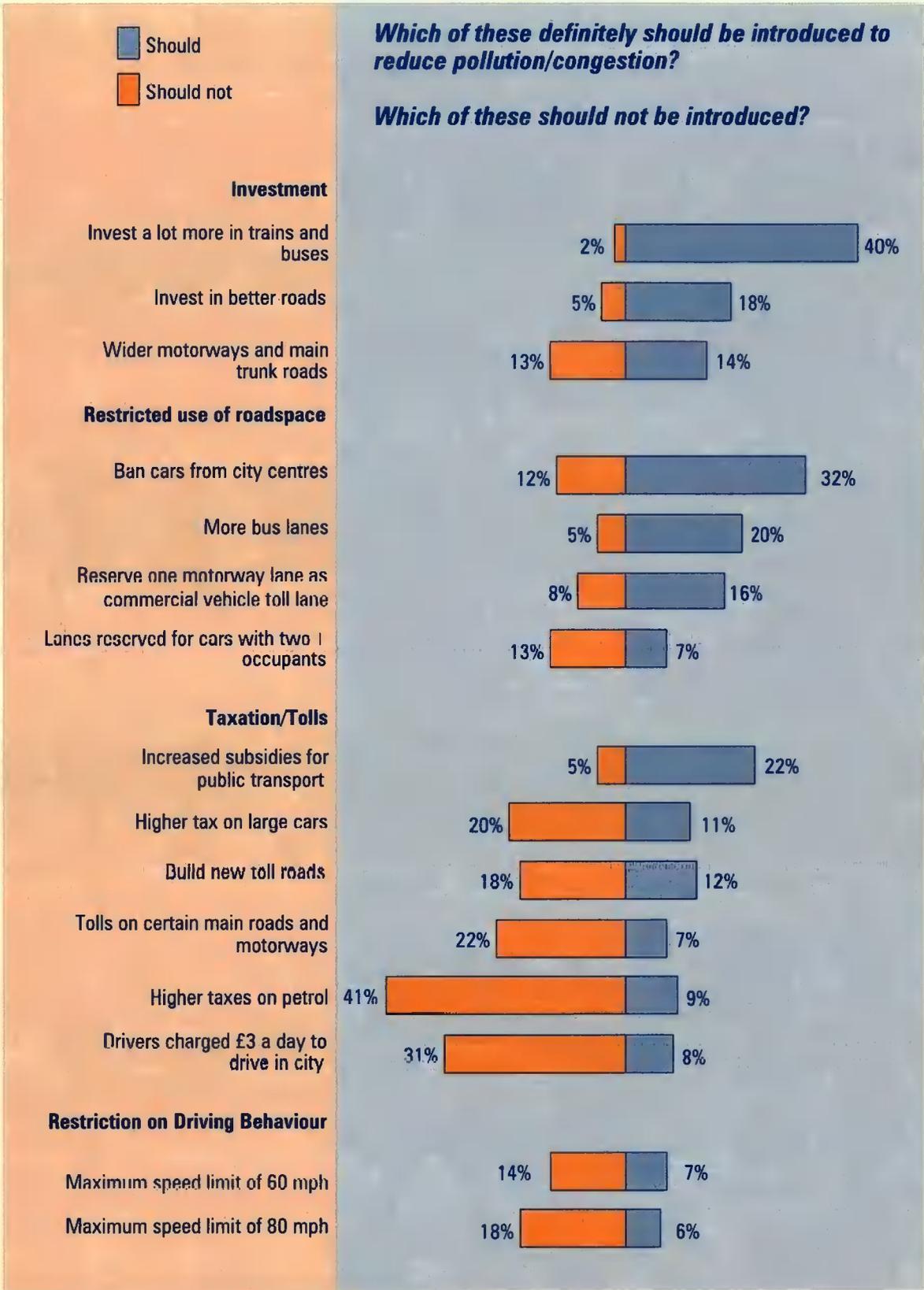
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

What are drivers' views on the environment and congestion?

Drivers' attitudes have moved markedly away from support for road development policies and towards policies which develop public transport and, in some cases, impose greater restrictions on the motorist. This is in line with the recently published report from the Royal Commission on Environmental Pollution.

Since 1990, car drivers have become less inclined to believe that investing in better roads and widening motorways and main trunk roads will help reduce congestion. They are more inclined to the view that investing more in buses and trains, introducing more bus lanes and banning cars from city centres will help reduce pollution.

- There has been a marked increase since 1990 in net support (percentage support minus percentage oppose) for banning cars from city centres, and increasing subsidies on public transport, and a marked decline in support for investing in better roads and widening major roads.
- Investing a lot more in trains and buses remains the most favoured policy, with 40% believing the Government should do this and only 2% that it should not.
- Next most favoured policies are the banning of cars from city centres, increasing subsidies for public transport and the introduction of more bus lanes.
- Although charging drivers £3 a day to drive in cities remains one of the least popular policies, even this policy has seen a marked increase in support and reduction in opposition.

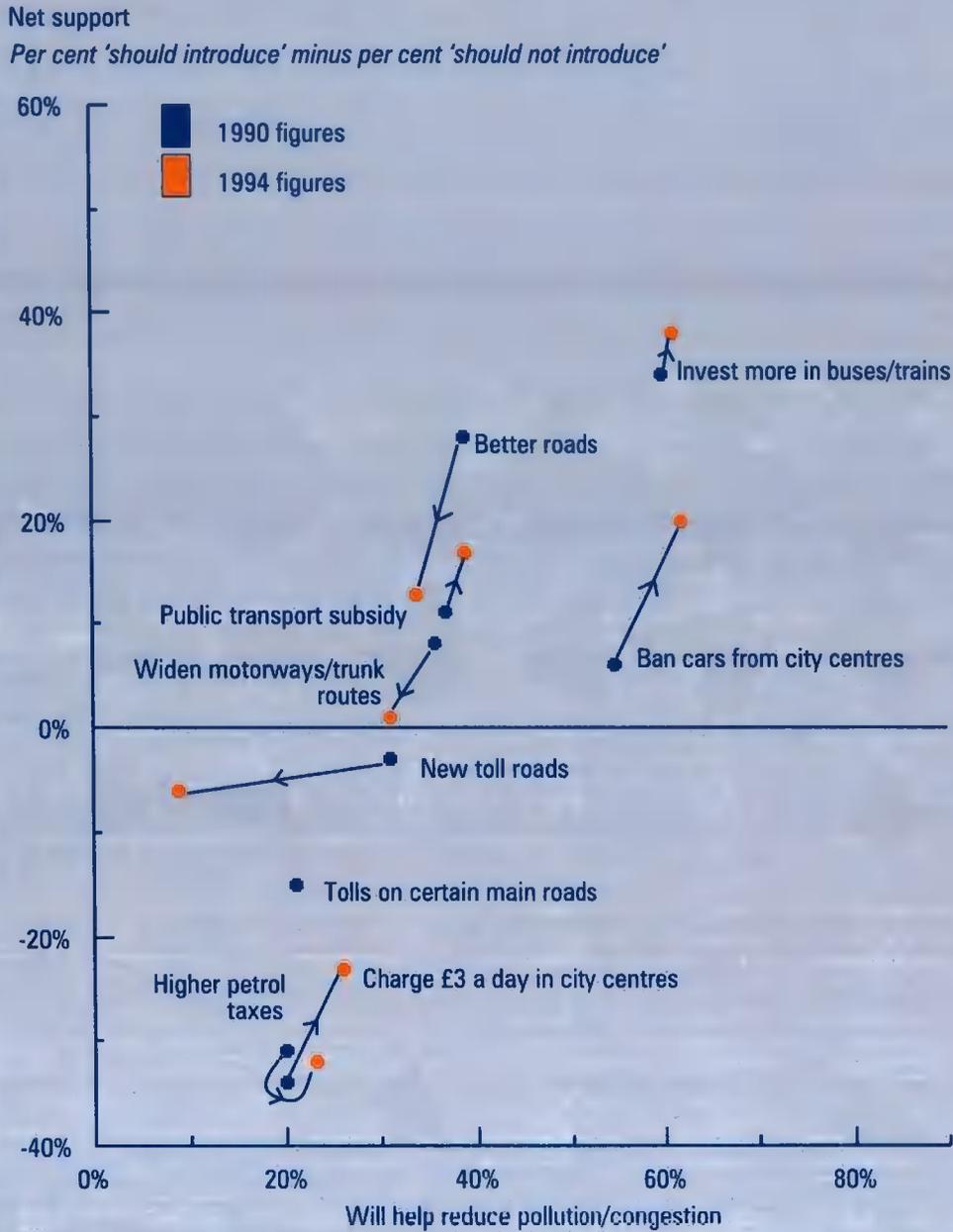


Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Drivers' views on environmental and congestion policy show an increasing grasp of the policies needed, but a reluctance to pay for them

Changes in attitudes to policies concerning pollution and congestion



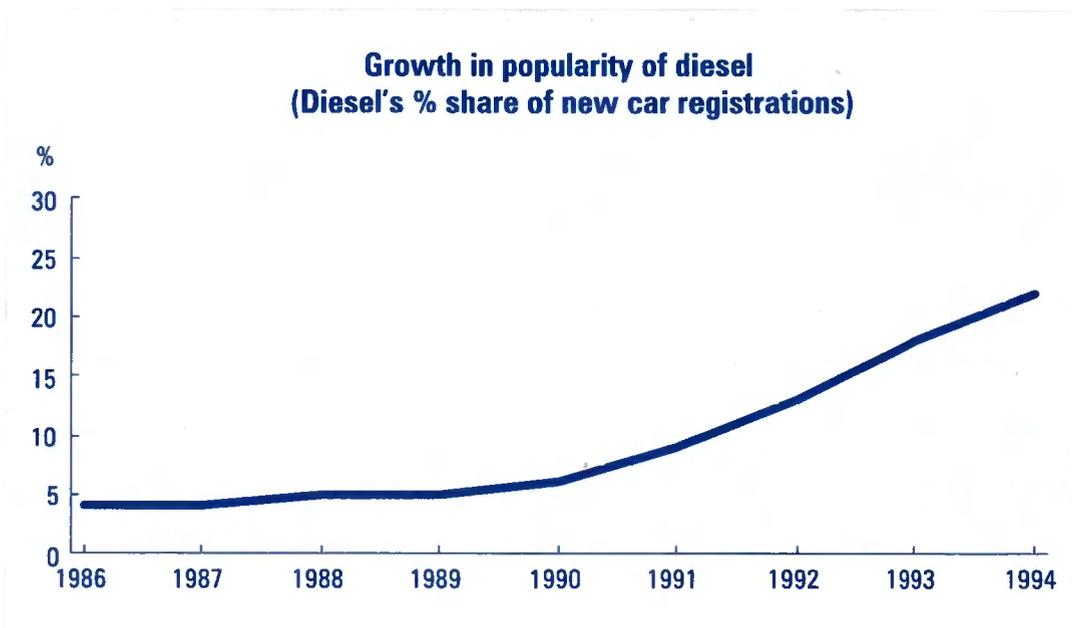
Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How do drivers view diesel cars?

Diesel cars have gained slightly in popularity since last year but their image has worsened in terms of being slower than petrol cars and less environmentally friendly.

- Around 6% of drivers now drive diesel cars and 7% say they are certain to consider buying a diesel car in the future. A total of 44% say they are certain, very or fairly likely to consider buying a diesel car, a slight increase since 1993. (See page 134 for more details). In the past five years, the proportion of *new* diesel cars has risen from 6% to 22% of all new car sales.



The demand for diesel cars appear to be slowing down as their image on performance and the environment worsens

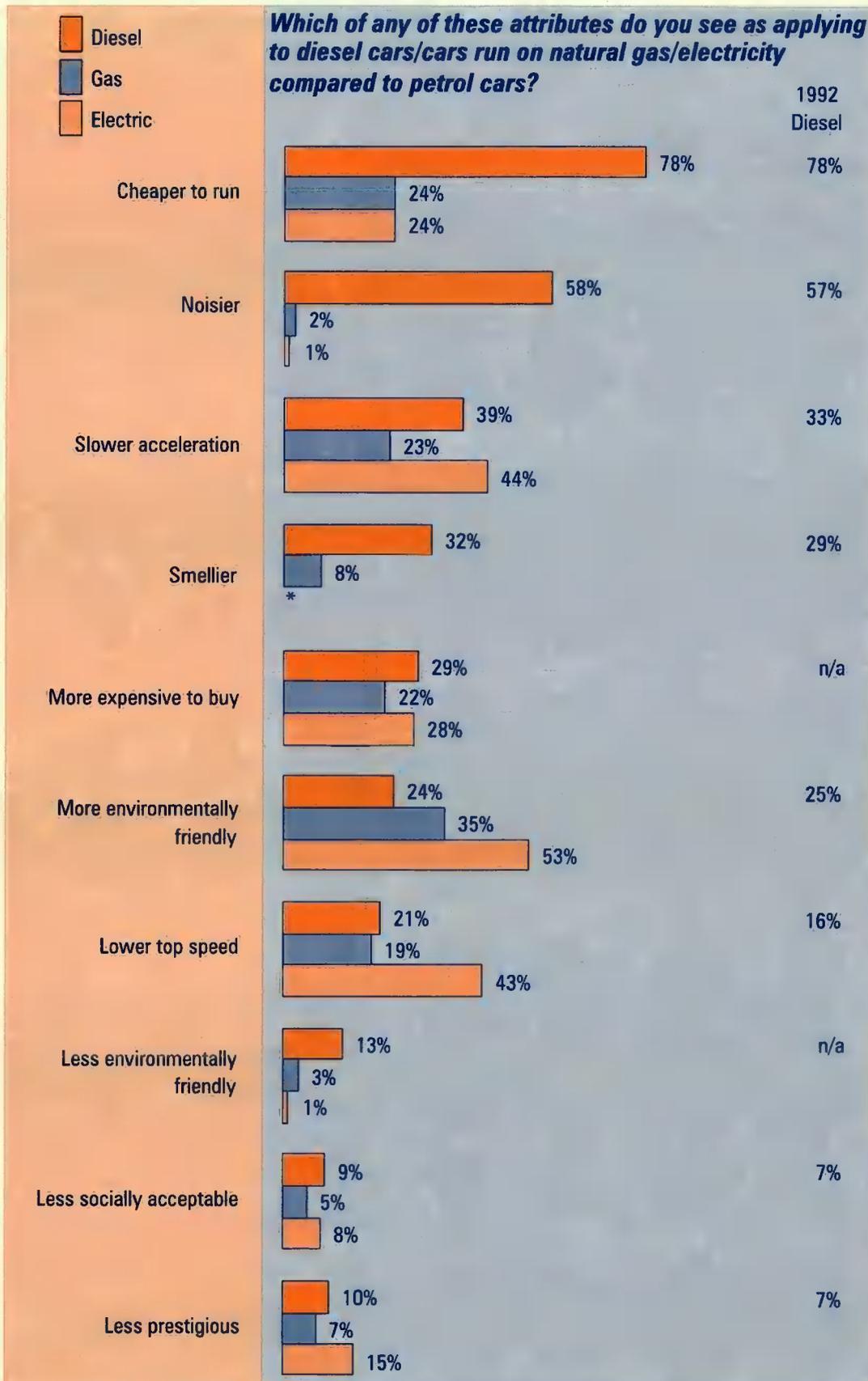
Source: SMMT

- Interest in diesel cars is highest for those aged 25-54 but drops sharply after that. Those driving over 20,000 miles per year and company car drivers are particularly likely to consider buying a diesel car.
- Drivers in general perceive *diesel* cars as cheaper to run but also noisier and smellier than petrol cars. There is also a widespread impression that diesel cars' performance is worse than petrol cars: 39% believe they have slower acceleration and 21% a lower top speed. Many also see diesel cars as more expensive to buy.
- The balance of opinion is that they are more, rather than less, environmentally friendly than petrol cars.

What about cars which run on natural gas or electricity?

Cars run on natural gas and on electricity are generally seen to be more environmentally friendly than petrol cars and cheaper to run but slower.

- Only six out of ten drivers felt able to express a view about *natural gas* cars; they identify the fuel with cars which are more environmentally friendly than petrol cars, cheaper to run but also more expensive to buy and with slower acceleration and lower top speed.
- The idea of cars which run on *electricity* is more familiar to Britain's car drivers – only one in four feel unable to compare them with petrol cars. Electric cars are also most widely seen as more environmentally friendly but are also particularly identified with slower acceleration and a lower top speed. Others feel they would be more expensive to buy but cheaper to run (24%, although 17% thought they would be more expensive to run), and more socially acceptable.



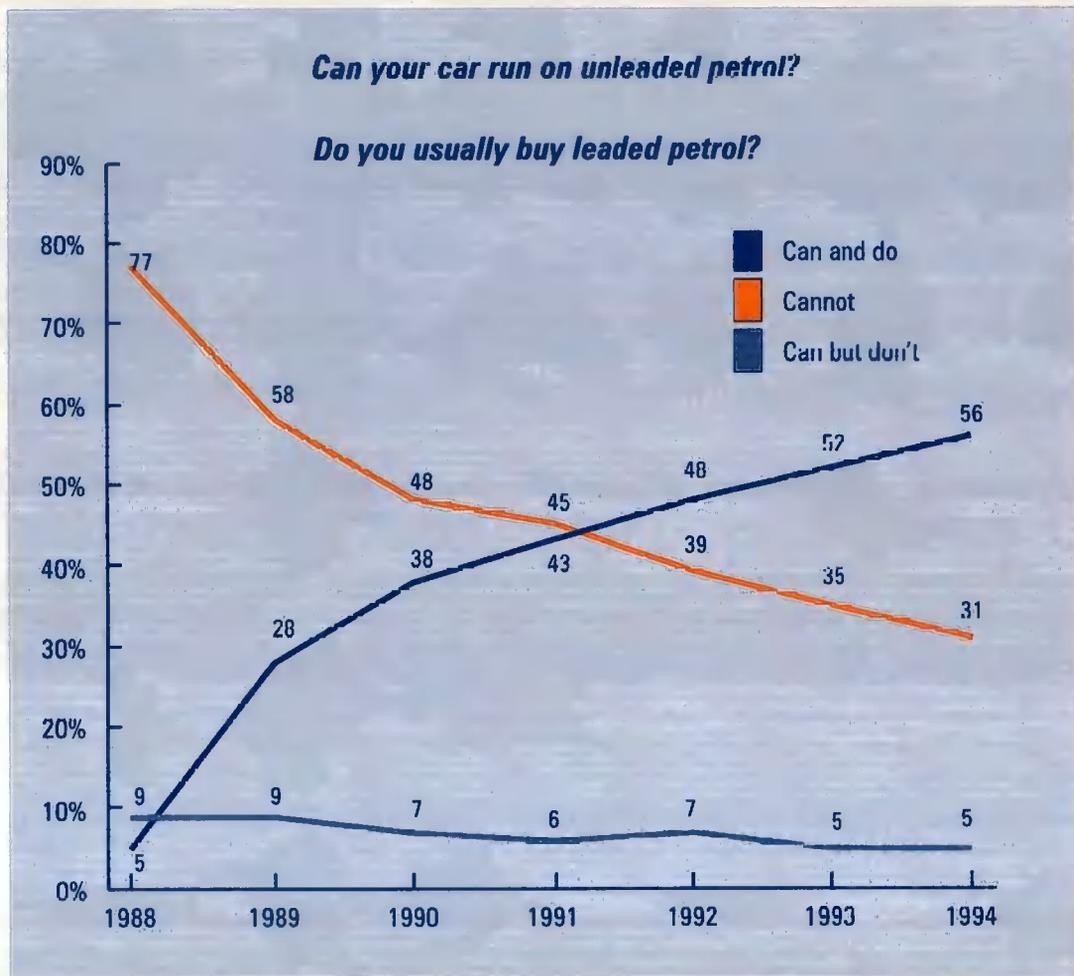
Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Do they use unleaded petrol?

More and more drivers are using unleaded petrol, driven by a widening price differential and increasing number of cars designed for unleaded petrol.

- 56% of drivers use unleaded petrol, 4% higher than last year.
- There has been a drop in those who cannot use unleaded petrol from 35% to 31%.
- Only 5% of drivers could use unleaded petrol in their car but do not.



Base: All drivers

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

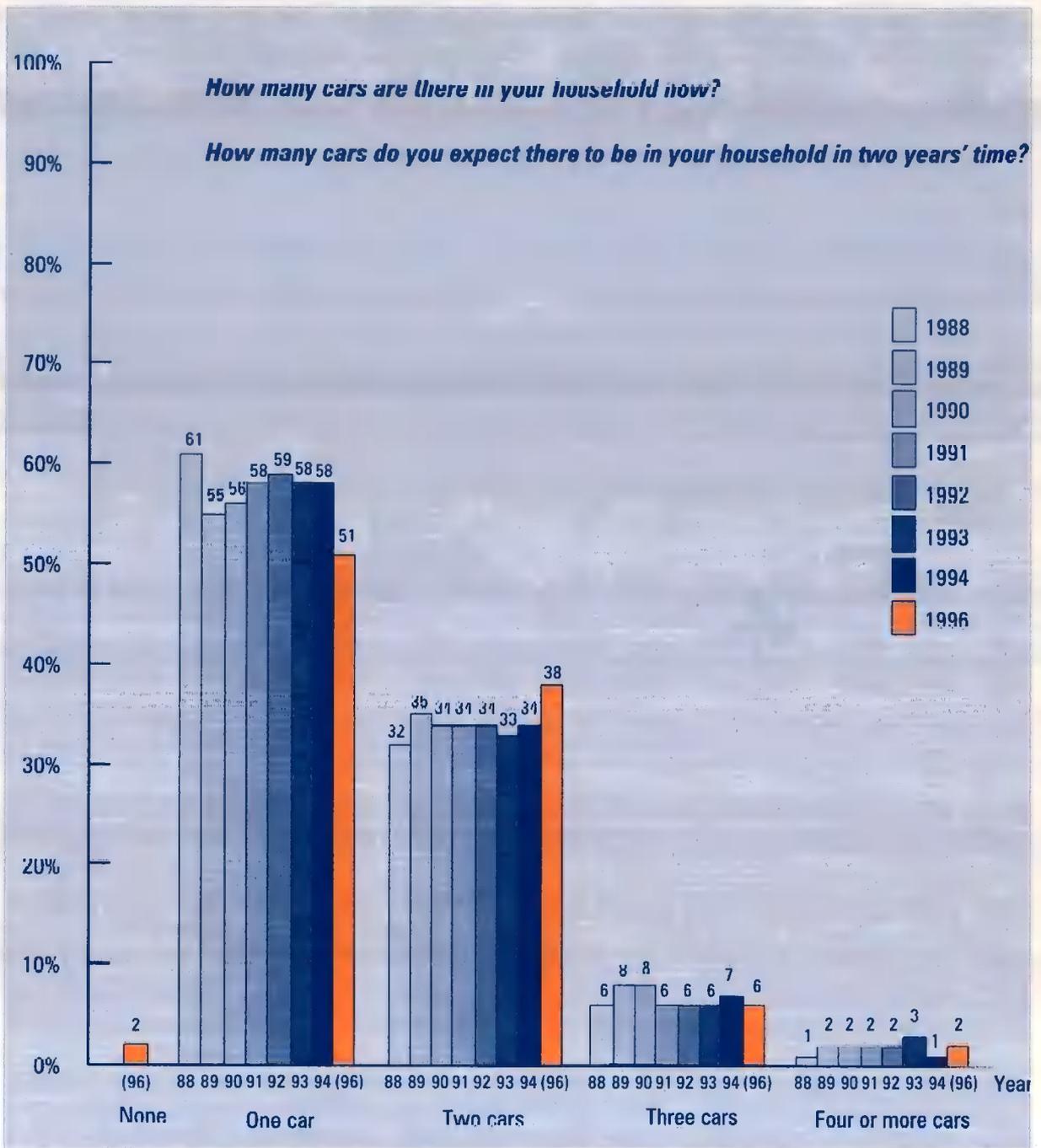
How many cars do they own and how many do they expect to own?

As the number of households in Britain has gradually increased, so the average size of household has declined resulting in a slight decline in the number of cars per household, while maintaining the total number of cars in Britain at around 24 million. Nonetheless, drivers remain optimistic about increasing the number of cars they have in two years' time which suggests a potential increase in demand of 3%.

- The average household in Britain with at least one regular driver has 1.52 cars. The proportion of drivers in one car households has remained around 58% since 1991, along with the proportions of those in two and three or more car households – 34% and 8% respectively. The figures reflect, if anything, a slight, but not statistically significant decline in the number of cars per household.
- The average number of cars per household with a driver is expected to rise to 1.57 by 1996.

The main growth in car ownership in existing car households would appear to be coming from one car households moving to two car households. Those currently in two car households, on average, expect to have no more than two cars in two years' time, and those with three or more cars are at best expecting no increase.

	Now			
	One (794) %	Two (597) %	Three (107) %	Four+ (21) %
Base:				
Expected Number of Cars in 2 years' time:				
None	2	1	1	0
One	79	13	3	0
Two	15	77	32	25
Three	1	8	47	0
Four+	*	1	12	69
Don't know	3	*	5	6
Mean	1.2	2.0	2.7	4.2



Base: All drivers

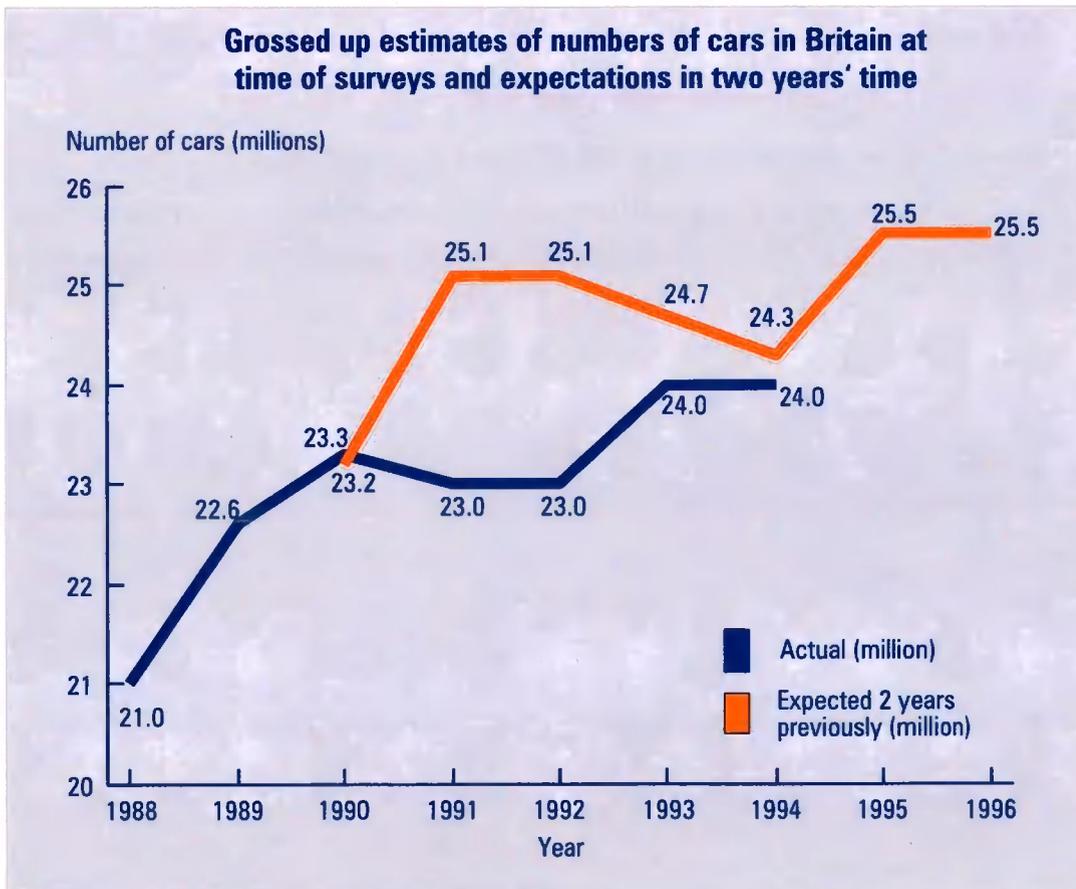
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Total Number of Cars

The seven Lex Reports on Motoring, based on surveys late in each year 1988 to 1994, provide a series of estimates for actual car ownership and expectations. From 1988 to 1994 actual ownership rose from 21 million to 24 million as a result of an increase in the number of cars per household as well as the estimated number of households in Great Britain and the proportion with a car. In 1994 the number of cars remained around 24 million with a slight decline in the average number of cars per household counter balanced by an increase in the number of households with cars.

Expected Increase in Car Ownership in Two Years' Time

Survey in	1988	1989	1990	1991	1992	1993	1994
	2.3 million	2.5 million	1.8 million	1.7 million	1.3 million	1.5 million	1.5 million



The growth by 3m in the number of cars in Britain over the last six years has resulted from:

- More households— 1.4m
- More households with cars— 1.0m
- More cars per household— 0.6m

Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

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

	Households in GB (DoE) m	Households with cars (OPCS) %	Ave. cars per household (MORI)	Grossed up no. of cars m	Expectations in Two Years' Time		
					Year of Expectation	Cars per household	Grossed up no. of cars m
1988	21.5	66	1.48	21.0	1990	1.59	23.3
1989	21.7	66	1.58	22.6	1991	1.67	25.1
1990	21.9	67	1.58	23.2	1992	1.63	25.1
1991	22.1	68	1.53	23.0	1993	1.59	24.7
1992	22.5	67.8	1.51	23.0	1994	1.55	24.3
1993	22.7e	68.6e	1.54	24.0	1995	1.60	25.5
1994	22.9e	69.0e	1.52	24.0	1996	1.57	25.5
1995	23.1e	69.1e					
1996	23.4e	69.3e					

e= estimated

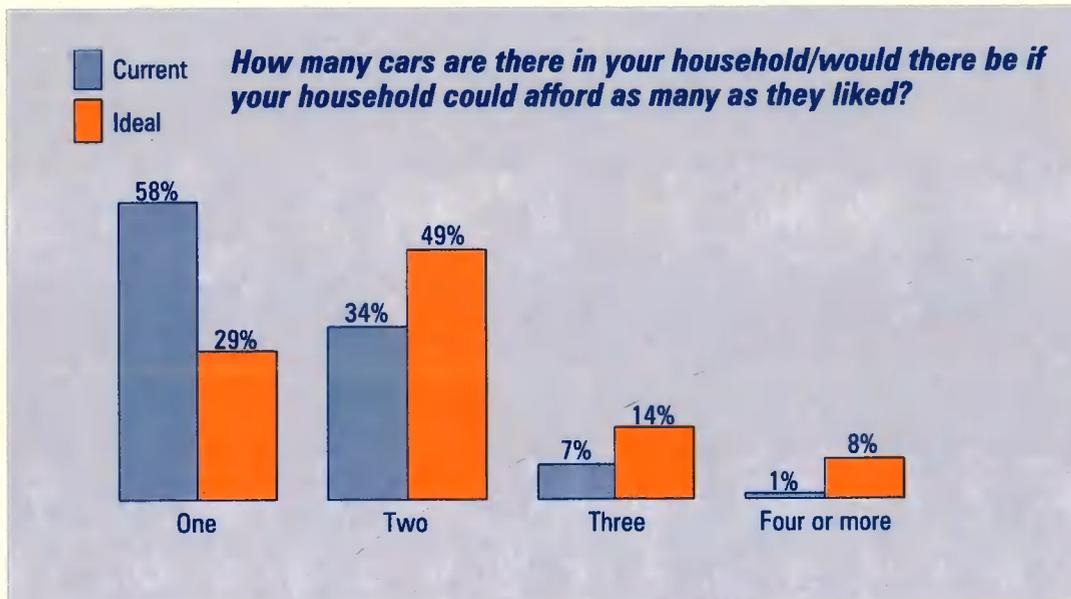
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

NB 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.

How many cars would they ideally like to own?

If Britain's drivers could afford it there would be another 8 million cars on Britain's roads.

- Asked if the people in the household could afford to have as many cars as they liked, the average household would ideally have 2.05 cars rather than the current 1.52 cars.
- The type of cars on the road would change markedly. Hatchbacks and saloons in particular would ideally be replaced by luxury saloons, 4x4 off roaders and sports cars. Indeed, the number of sports cars would increase from the current 0.6 million to 4.4 million, while the number of small hatchbacks would decline from the current 5.2 million to just 3.8 million.
- Aspirations, though, are generally modest, with drivers generally wanting at best only one additional car in their household rather than two or more. Half of all current one-car households would increase this to at least two cars, and a quarter of current two-car households would aspire to three or more. One car households aspire, on average, to around 1.6 cars, two car households to 2.4 cars and three car households to 3.4 cars.



Mean - Actual 1.52
 - Ideal 2.05

Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

- The reasons for wanting another car are a mixture of meeting needs for greater mobility of household members and a wider range of individual lifestyles:

"My wife would like her own"

"So we could all do different things"

"We all want our own car"

"The children would like their own car"

"I'd like to have a fun car"

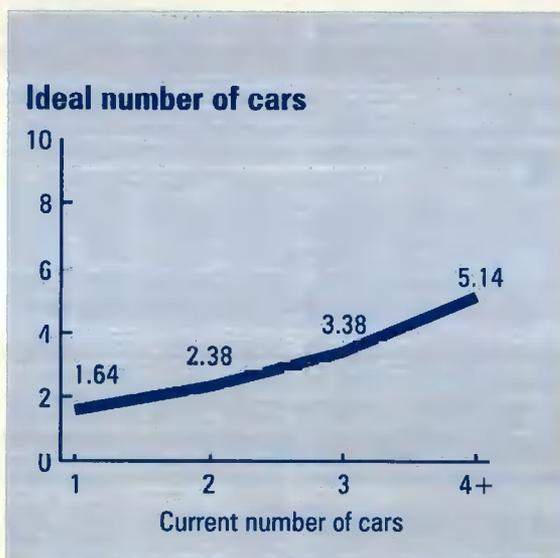
"So we could have a summer car and a winter car"

"I like restoring old cars"

"I'd like a smaller car for parking"

"Just another to potter around in"

"Public transport is poor around here"



Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

THE MORAL MOTORIST

Most drivers appear to be driven by a sense of moral responsibility, whether this be in the use of disabled stickers or parking spaces reserved for the disabled, confessing to damaging another's car or driving when slightly over the limit. While older drivers set the example when it comes to acting responsibly towards the disabled, it is the young drivers who set the standards when it comes to drink driving. Not only are they more conscious of drink driving as a major cause of accidents, but they are also less likely to drive home from a friend's when finding their drinking has taken them slightly over the limit.

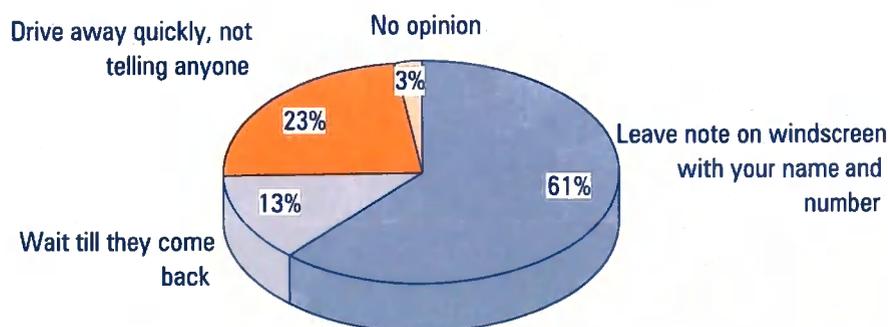
Even though the young are also more likely to blame speeding for accidents than older drivers, they have been shown to be much more prone to speeding, especially if they are male. But the research suggests that speed cameras are being successful in causing drivers to slow down, even if, for many, the response is only for the camera.

How well do they behave towards other motorists?

Denting someone's car

- One in four drivers would drive away quickly if they backed into someone's new car making a slight, but noticeable dent.
- Three out of four say they would leave a note on the windscreen or await the owner's return.
- However, young drivers are much more likely to leave the scene hurriedly. Four out of ten 17-24 year olds would drive hurriedly away declining to just one in twenty drivers aged over 64.

You have mistakenly backed into someone's new car making a slight but noticeable dent; there are no witnesses. Do you...?

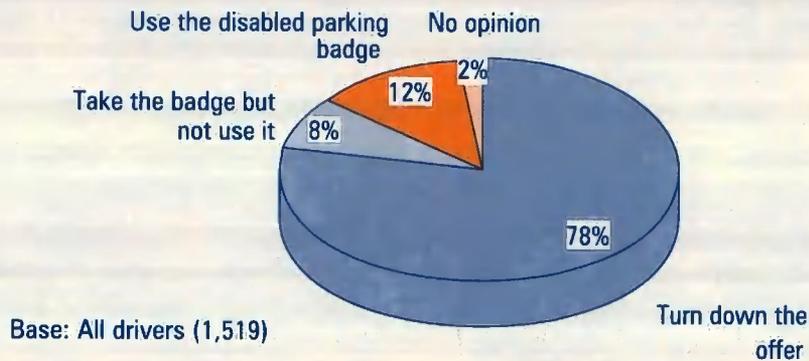


Base: All drivers (1,519)

Disabled parking badges

- If offered a disabled parking badge by a disabled friend, some one in eight, or three million drivers, would use the badge to go shopping where parking spaces are scarce. This proportion rises to one in five 17-24 year old drivers and declines to one in twenty drivers aged over 64.

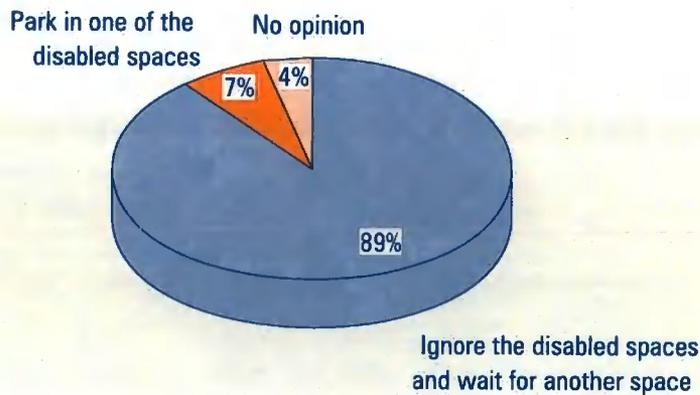
A disabled friend offers to lend you their disabled parking badge to go shopping in an area where parking spaces take a long time to find. Do you...?



Disabled parking spaces

- One in twelve drivers would park in a space reserved for disabled drivers in a multi-storey car park if these were the only spaces left.
- Men are slightly more likely than women to be tempted, but age differences are not so marked. Just one in nine 17-24 year olds would opt for the disabled parking spaces.

Driving around a multi-storey car park, unable to find a space, apart from several spaces reserved for disabled drivers. Do you...?



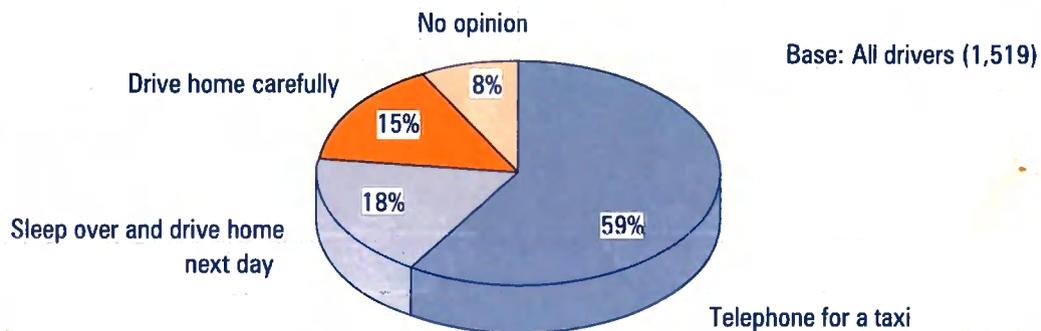
Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Drinking and driving

- One in seven drivers – just over three million – who find themselves at a friend’s house, several miles from home, when they are slightly over the limit, would drive home, albeit being particularly careful.
- Most drivers would telephone for a taxi. A few, particularly the young, would sleep it off on the sofa.
- In this case the tendency is, if anything, for older drivers to take the risk rather more than younger drivers. Men are one and a half times more likely than women to drive home. Women are much more likely to call a taxi.

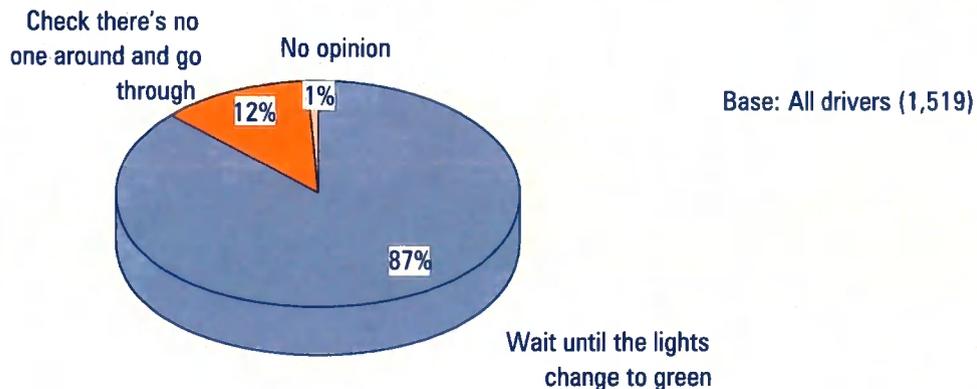
At a friend’s home, a few miles from home, you drink slightly over the legal limit. Do you...?



Crossing red lights

- The vast majority of people claim they would conscientiously sit at a red light at a crossroads at night, even though there are no other cars around and they know the lights take several minutes to change.
- One in seven men and one in fourteen women would check there is no-one around and go through.

Driving late at night alone, no other cars around, the lights at the crossroads have just changed to red. Do you...?



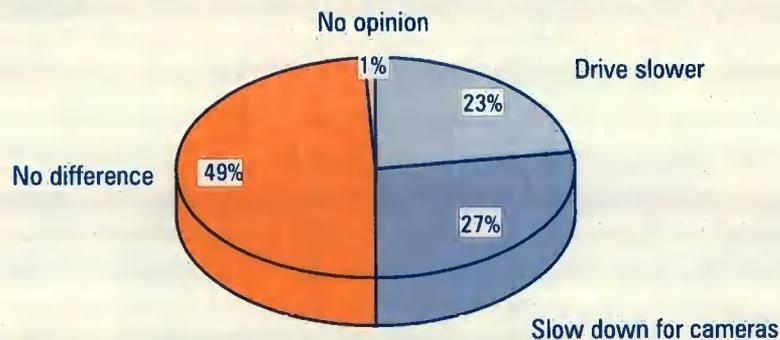
How have they reacted to speed cameras?

Some 13 million drivers admit to having moderated their driving habits as a result of speed cameras. However, over half of these only slow down for the cameras.

- Four out of five drivers are aware of having driven on any roads with speed cameras along them in the past 12 months and half of these admit to having modified their driving as a result.

Younger drivers are more likely to have responded to speed cameras in some way, but they are also more likely to have been speeding in the first place

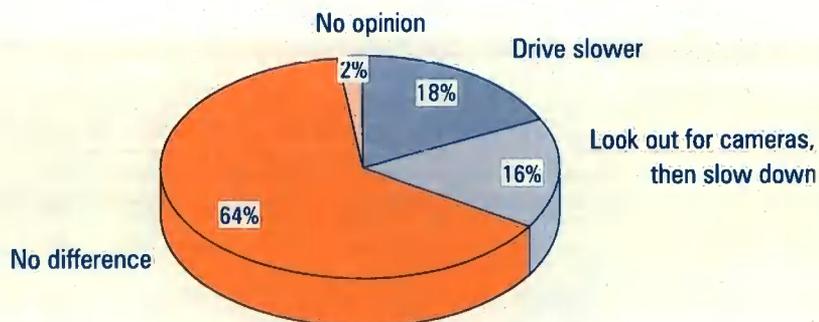
How has your driving been affected on roads having speed cameras?



Base: All drivers (1,519)

- The cameras have affected men and women in the same kind of way.
- 17-24 year old drivers are particularly likely to slow down.
- One in three drivers believe these speed cameras have affected their driving on *other* main roads. One in six believe they drive slower generally – both men and women – and almost as many say they look out for cameras and then slow down; one in five male drivers admit to this compared with one in eight female drivers.

How have speed cameras affected your driving on other main roads?

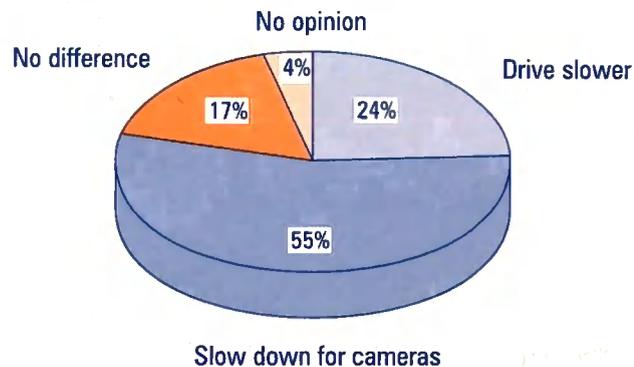


Base: All drivers (1,519)

Drivers believe other drivers are more likely to have moderated their driving habits.

- Four out of five believe other drivers have also moderated their driving on roads with cameras.

How do you think other people's driving has been affected, driving along roads with speed cameras?



Base: All drivers (1,519)

What causes accidents?

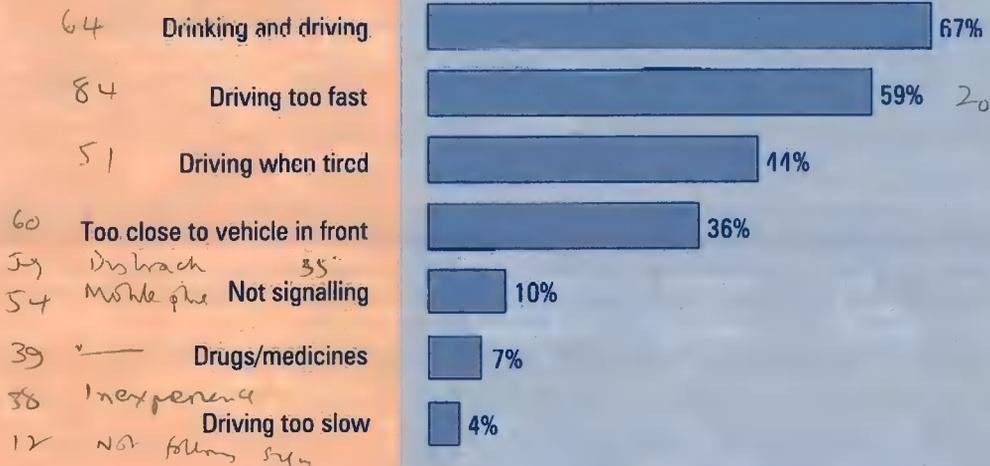
Drivers are most likely to blame driver-related problems for causing road accidents rather than vehicle-related problems, or road and other conditions.

- Two out of three drivers blame *'drinking and driving'* as the most frequent causes of road accidents.
- *'Driving too fast'*, *'driving when tired'* and *'driving too close to the vehicle in front'* were nominated by at least a third of respondents.
- *'Bad weather'* was blamed by one in four drivers, but factors related to road conditions received relatively few mentions.
- The vehicle-related problems most frequently mentioned were *'bald tyres'* and *'poor brakes'*.

6

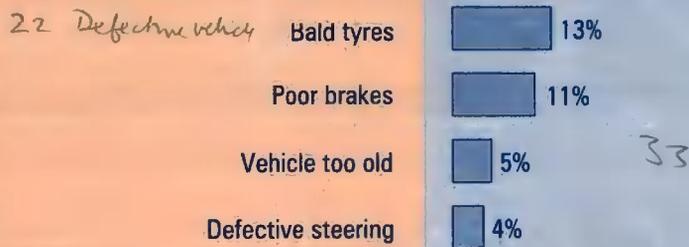
Which two or three of these do you think are the most frequent causes of road accidents in this country?

Driver-related problems



22

Vehicle-related problems



33

Road/conditions-related problems



Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

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THE CARS PEOPLE DRIVE

The cars chosen by Britain's drivers reflect their lifestage and lifestyle needs, but the growth of multi car households allow these needs to be met in an increasing variety of ways. Small cars, particularly runabouts, appeal to the young, and small saloons and hatchbacks to retired people. But small cars are also important, particularly in middle years, for pairing with larger cars to meet the demands of work, shopping, leisure and school runs. Small cars have the appeal of price but the hatchback and runabouts have clearly appealed to the more discerning motorist who is looking for more than just a saloon to get them from A to B. High expectations among drivers of new cars for additional features, particularly those relating to safety and security, show how manufacturers have to innovate continually to differentiate their brands from one another to maintain brand loyalty.

Which cars do they drive?

Drivers were asked to identify what type of car they owned from the pictures.

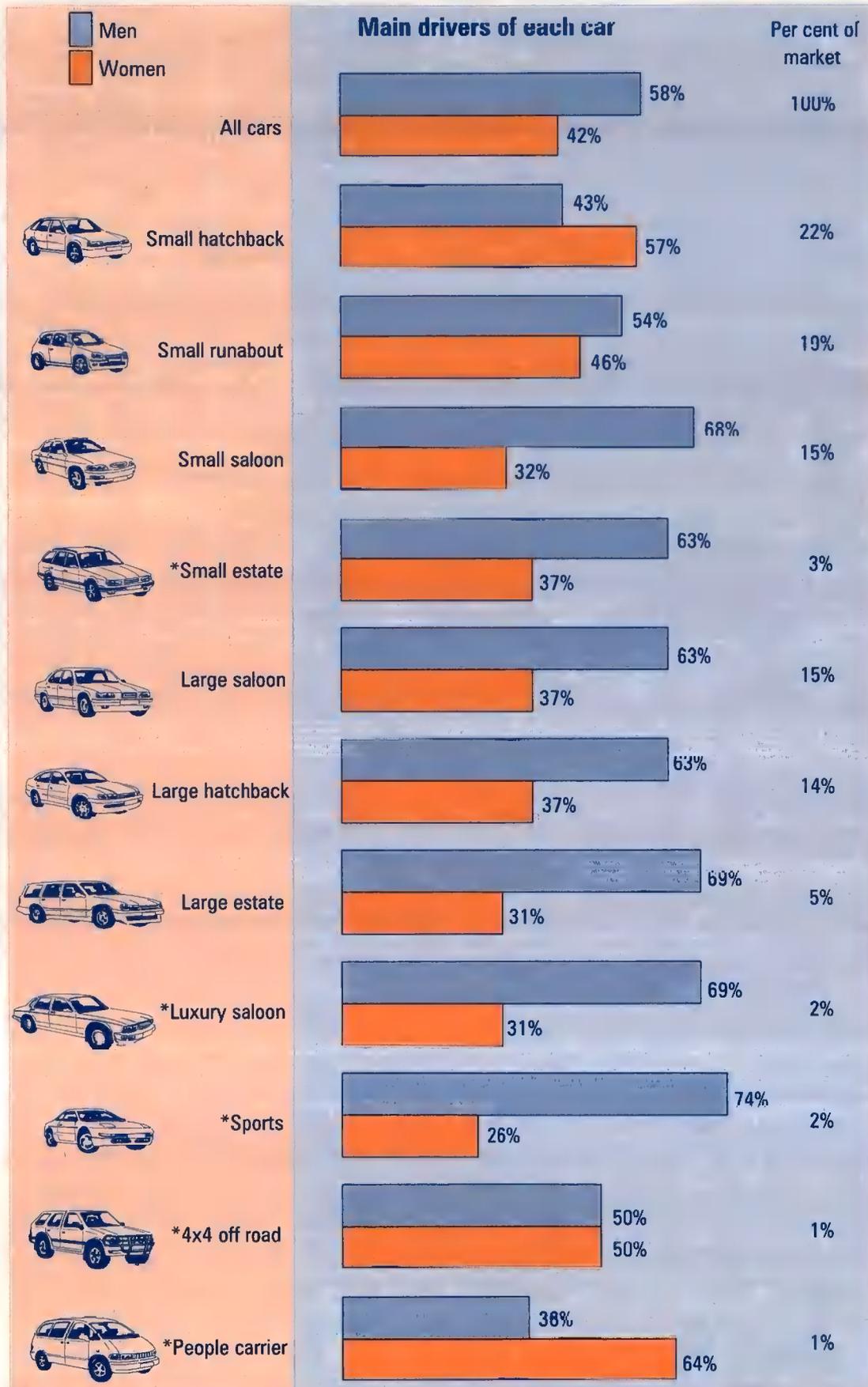
The most popular types of cars are small hatchbacks, small saloons and small runabouts, which account for three out of five cars on the road.

The only car types that are driven more by women than men are small runabouts and people carriers.

- Three out of five of those who drive 'small hatchbacks' most often are women.
- Two out of three driving 'people carriers' are also women, although the base is very small so less reliance can be based on this figure.
- Male drivers are particularly dominant for large estates, luxury saloons and sports cars.

Cars are lasting longer with the average age of the car parc now estimated at 5.9 years and this has been increasing as cars are built to higher standards.

- One quarter of cars on Britain's roads are less than three years old. One half are over six years old.
- Three out of ten were bought by their current owners from new, seven in ten second hand.
- Around nine out of ten are privately owned, one out of ten was bought by an employer or as a business expense.
- Nearly half the cars on the road have an engine size of 1400cc or below. Only 10% are above 2000cc.



(*small bases)

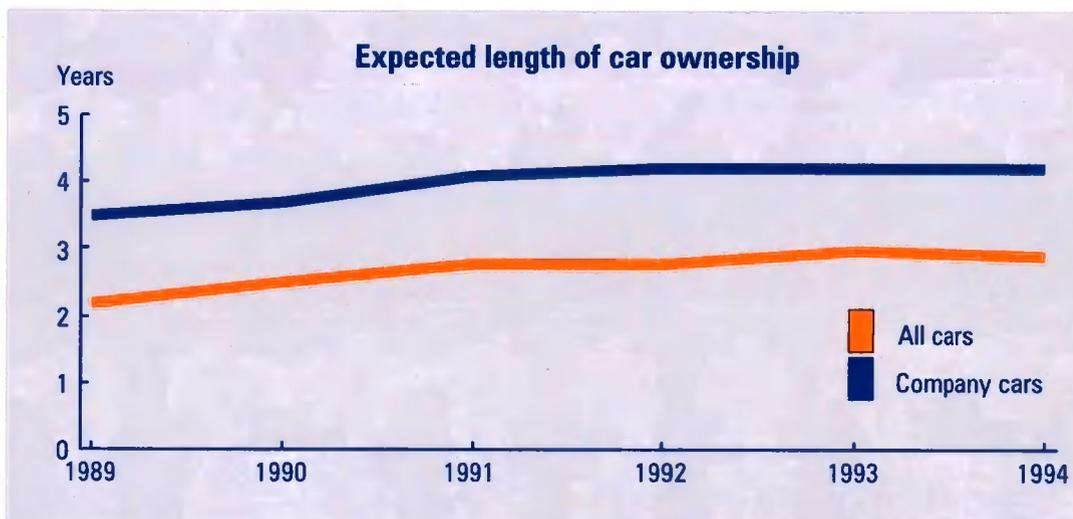
Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How long will they keep their cars?

Drivers show little sign of reducing their average expected length of car ownership suggesting that the recovery in both new and used car markets will be slow.

- Drivers expect to keep their cars an average of 4.2 years.
- The trend has been flat for two years following extended expectations of lengths of ownership in the first three years of Lex surveys.
- Both new and used car drivers expect to keep their cars for 4.2 years.
- Neither of these figures have changed since last year. They suggest the recovery in both the new and used car markets will be slow. (See section on 'What's driving car retailing?' for further detail, page 76).
- The average expected length of ownership of company cars has, if anything, declined slightly to 2.9 years, although it remains historically high.



Drivers will not give up their cars—the recession and increasing reliability have resulted in drivers keeping them longer, thus slowing down the growth in new car sales

Base: All drivers

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Expected Length of Car Ownership

Average length of ownership
(total of period already owned and expected future ownership)

(Years)	1989	1990	1991	1992	1993	1994	
All	3.5	3.7	4.1	4.2	4.2	4.2	4.2
Company (own and other)	2.2	2.5	2.8	2.8	3.0	2.9	2.7
Private	3.7	3.9	4.3	4.4	4.3	4.3	4.4
Bought new	3.2	3.8	4.1	4.3	4.2	4.2	4.2
Bought used	3.6	3.7	4.1	4.1	4.2	4.2	4.2

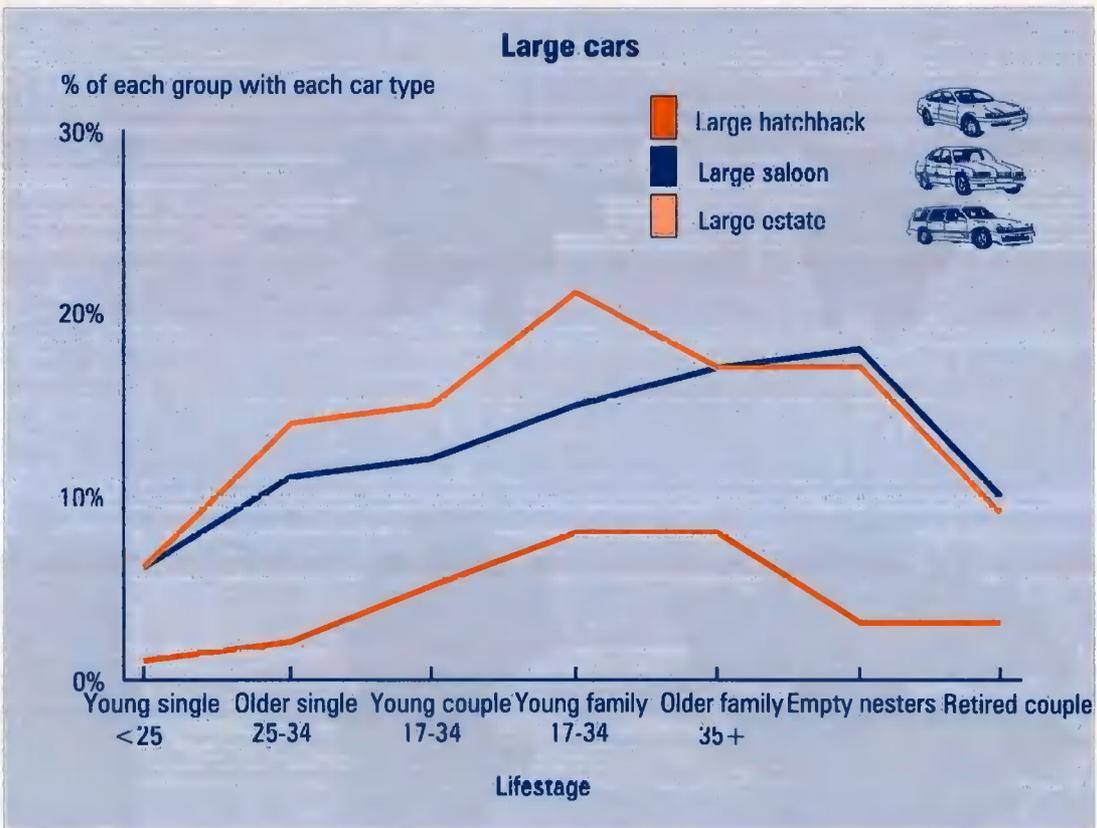
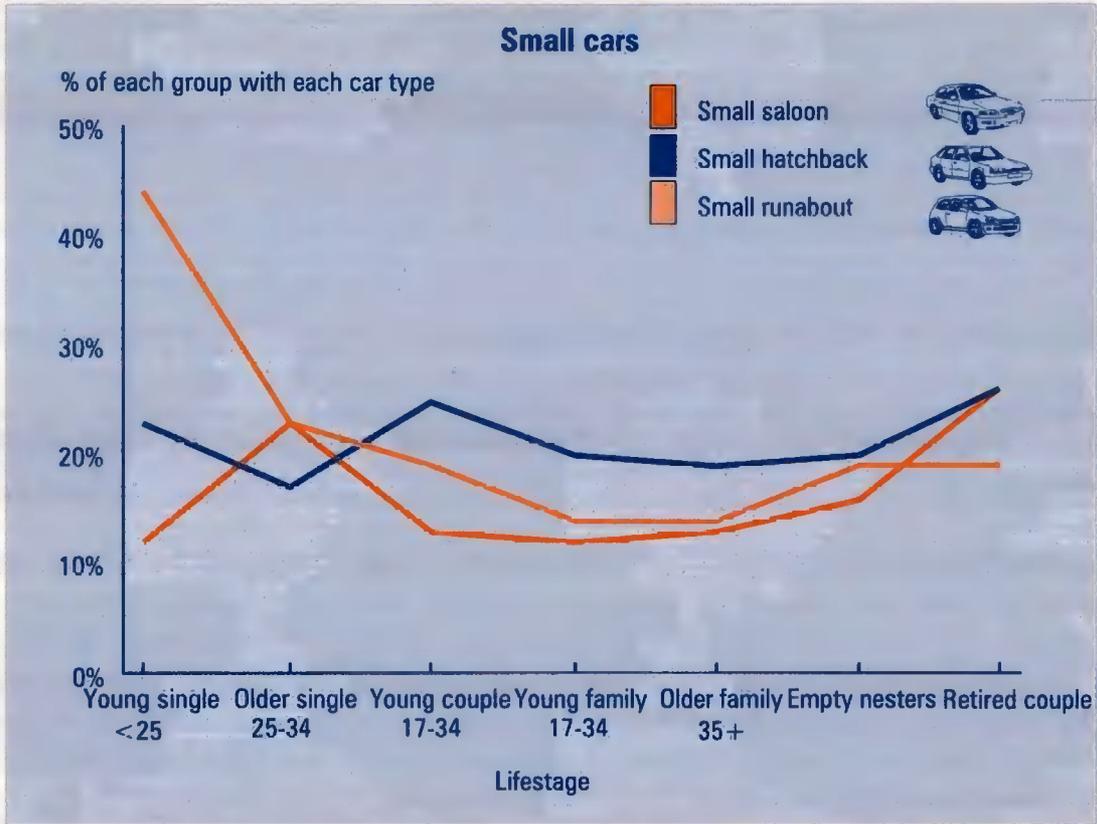
Base: All drivers

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"

How does their lifestyle affect the car they choose?

The types of car chosen reflects the needs and means of people at different life stages.

- Single people, whether young, middle-aged or old have a particular preference for small runabout town cars. Indeed, 44% of drivers who are single and aged under 25 drive a small runabout car, as do a quarter of single drivers aged 25-34, a third of single drivers aged 35-50 and a third of retired drivers living on their own.
- As they break through the 25 year age barrier, single drivers tend to gravitate towards small saloons, a preference which is picked up again by older pre-retirement and retired drivers.
- Marriage, and the coming of children, inevitably changes needs. Young couples aspire towards small hatchbacks instead of their small runabouts while the arrival of a family has them looking for something a bit larger, commonly a large saloon or even a hatchback.
- By middle-age, drivers are settled into a pattern dominated by small hatchbacks and large and small saloons which lasts until well after the children have grown up and left home.
- In the sunset years, drivers return to the patterns of the younger generation characterised by small hatchbacks, saloons and small runabouts.
- On their journey through life they may flirt with a sports car if they are male and in their 20s or early thirties, or a people carrier if they are more affluent and have children.



Base: All drivers (1,519)

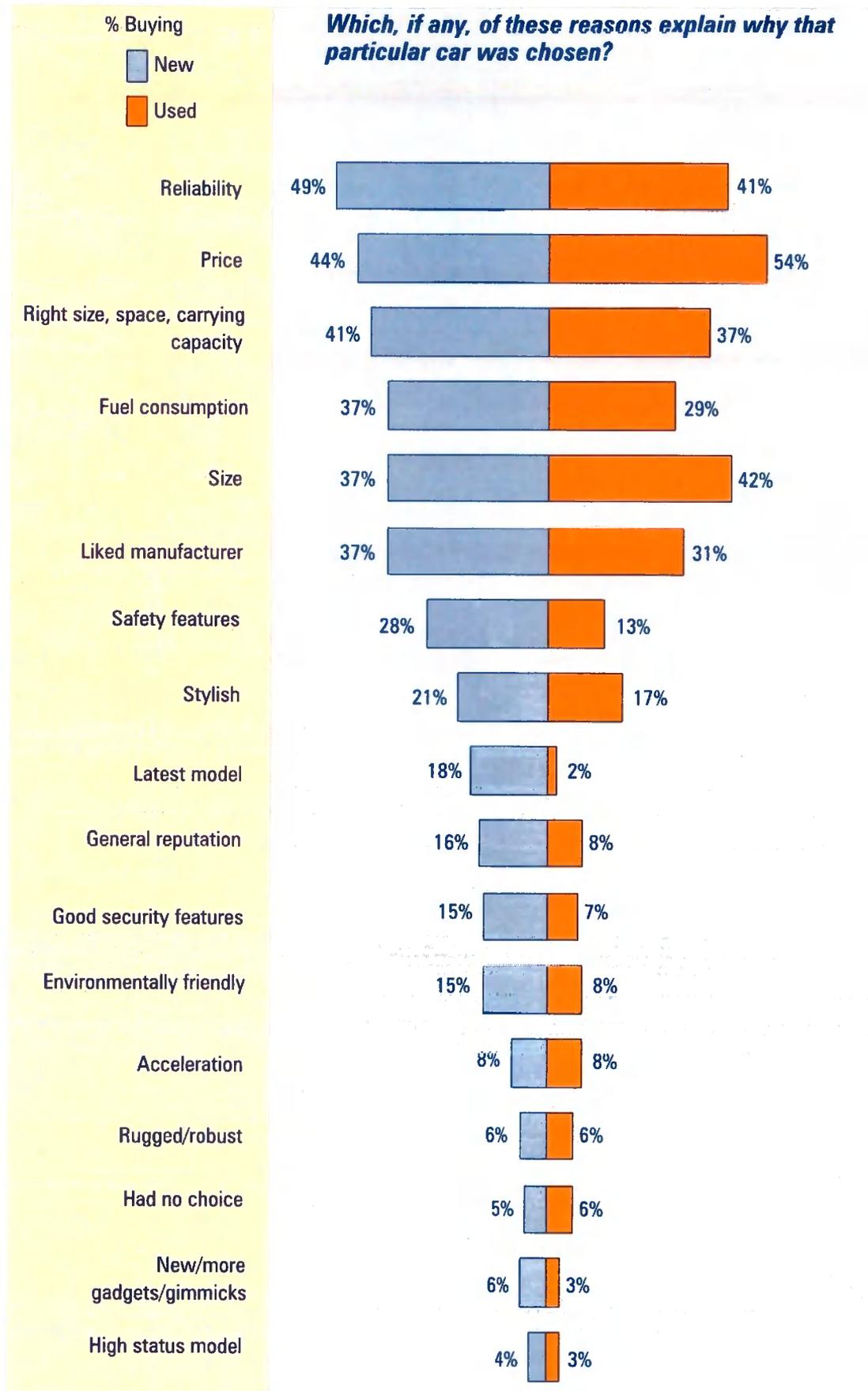
The combinations of cars in multi-car households no doubt reflect a complex variety of needs, but some clear tendencies emerge with respect to the types of car that are matched.

- Around 40% of small cars in multi car households are matched with other small cars. But they are more likely to be matched with other types of cars.
- Around 70% of large cars in multi car households are matched with small cars.
- Small and large hatchbacks often go together. 34% of large hatchbacks in multi car households are paired with small hatchbacks, while 20% of small hatchbacks in such households are paired with large hatchbacks.
- Small runabouts are the most popular choice of mate for luxury saloons; they are found in 35% of multi car households with a luxury saloon.
- Although samples are small, it does seem that sports cars are commonly paired with small hatchbacks and runabouts, 4x4 off roaders with small saloons and people carriers with small runabouts.

Why do they choose the car they drive?

The factors driving the selection of one car over another vary according to whether they are bought new or used and according to the type of car bought.

- Reliability, fuel consumption and safety feature more strongly among new car buyers whilst price and size feature more among used car buyers.
- Those who buy *new* saloons, large or small, appear to have less strong reasons than those who buy new hatchbacks or runabouts. They are simply bought for their reliability and often through manufacturer loyalty.
- Small hatchbacks, and runabouts bought new, are particularly bought for their price and economy; reliability and size are also important considerations.
- Understandably, price is a significant consideration for all the main types of *used* cars bought. In most cases so too are reliability and size.
- Small hatchbacks and runabouts are particularly bought for their fuel consumption, while saloons, small or large, and large hatchbacks are often bought out of commitment to their manufacturers.



Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Main Reasons for Choosing Each Type of Car

	Price	Reliability	Size	Right size space, capacity	Fuel consumption	Liked that manufacturer	Good safety features
Cars bought new							
Small runabout	●●●	●	●	●	●●		
Small hatchback	●●●	●●●	●●	●●	●●	●	●
Small saloon	●	●●		●	●	●	
Large saloon	●	●		●		●	
Large hatchback	●	●	●	●●		●●	●
Cars bought used							
Small runabout	●●●	●	●●		●●		
Small hatchback	●●●	●	●	●	●		
Small saloon	●●●	●	●	●		●	
Large saloon	●●	●●	●●	●●		●	
Large hatchback	●●●	●	●●	●●		●●	

- = 50% +
- = 40-49%
- = 30-39%

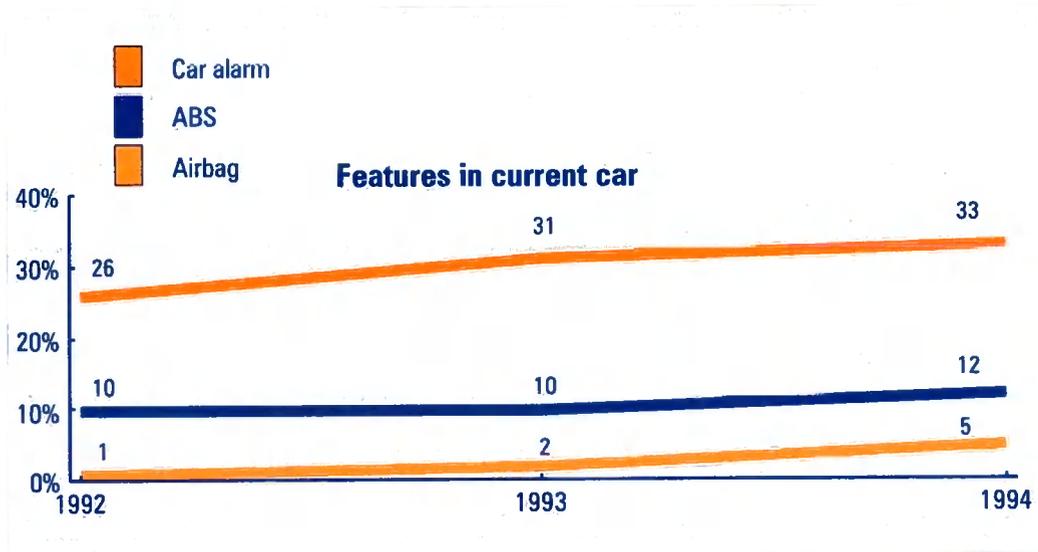
Base: All cars

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

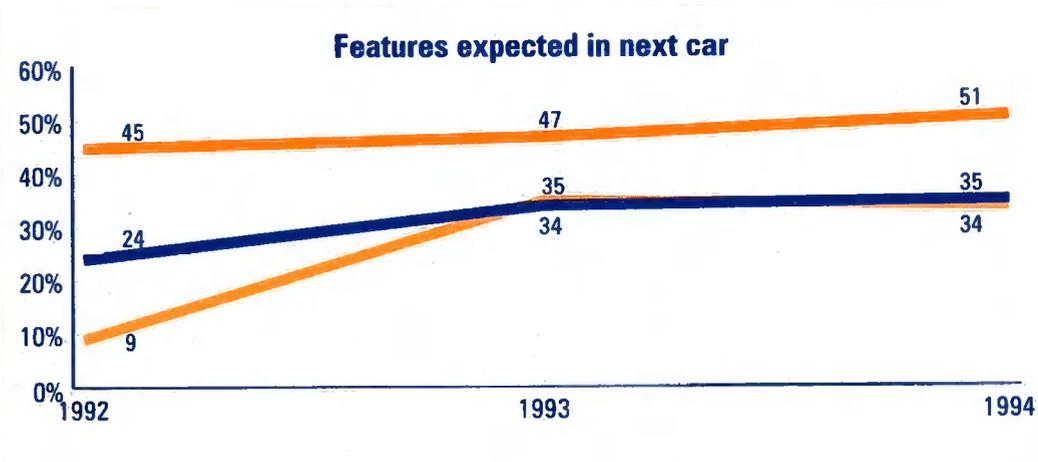
What features are they looking for on their next car?

Drivers continue to expect more from their cars in terms of features. Security and safety continue to be high on the list of expectations for the next car, although for some features the reality is slow to match the expectations expressed in previous years.

- Among security features, central locking and car alarms head the list of expectations. One in three cars currently has a car alarm; half of drivers expect to have a car alarm in their next car, an increasing proportion.
- The expectation of having anti-lock brakes has increased even more markedly from a quarter in 1992 to a third in 1994, although only one in eight have such a system on the car that they currently drive. More than four in ten new car drivers expect this feature on their next car.
- Airbags have also caught drivers' imaginations. One in three now expect them to be fitted to their next car, compared with one in ten two years ago. However, rising expectations remain largely unfulfilled; only one in twenty currently have airbags in their cars and one in seven new car drivers.
- Thief-proof radios/cassettes are more common. One third now have them, and four out of ten expect them in their next new car.
- Interest in high technology features remains low. In-board computers for detecting traffic jams and adverse weather, and even car phones are expected only by a handful of drivers although up to a third would like these features if money were no object.
- Though small in number, those who expect their next car to be a sports car expect the most features, particularly in relation to safety. Those planning to buy large saloons are particularly security conscious. Those planning on buying luxury saloons, understandably, go more for luxury items such as air conditioning and electric sunroofs.



Drivers continue to look for safety and security features rather than high technology



Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

What will they buy next?

Car drivers generally stay with the same type of car when they replace their old one.

- Four out of five people who currently drive a new car will replace it with another new one.
- Over 90% of used car drivers will choose another used car.

Of total cars bought new, 75% are expected to be replaced by new cars (after "don't knows" have been excluded), 16% by used cars and 9% are not expected to be replaced at all. Of cars bought used, 82% are expected to be replaced by used cars, 8% by new cars, although 10% will not be replaced at all, again, excluding "don't knows". 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.

	Next Car	
	Will buy new (732) %	Will buy used (1246) %
	Current car was bought...	
New	80	7
Used	20	93

	Current Car	
	Bought new (849) %	Bought used (1494) %
	Next car will be bought...	
New	75	8
Used	16	82
Will not be replaced	9	10

Base: All cars (2,353)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Replacement Cars

Based on the expected switching into and out of each type of car, the main gainers in overall market share could be large estates, small estates and 4 x 4 off road vehicles. The greatest losers would be small runabouts and small and large hatchbacks, although, with high levels of uncertainty, this could change by the time actual purchase decisions are made.

- One in five drivers do not know what type of car will replace the one they currently drive most often. Moreover, even if they do know there is a large propensity to switch between car types. Loyalty to types is greater for small hatchbacks, large saloons and large estates and less for small saloons, large hatchbacks and small estates.

Taking all these trends together with the age profiles suggests that:

- The market for small saloons will continue to decline, particularly as 18% of their drivers are aged 65+ and more than a third of current drivers expect to replace them with another type of car.
- The market for small hatchbacks will remain stable, or slightly decline.
- The market for small runabouts will remain buoyant so long as they continue to appeal to younger drivers. However, with one in seven of their drivers aged over 65, and twice as many current drivers expecting to switch away from this type, as to it, means it is highly dependent on attracting first time buyers.
- The market for large saloons is vulnerable with the highest proportion of any type expecting to switch to another type (38%) and slightly more current users expecting to switch away from the type than towards it.
- There could be growth in the large estate market with more than twice as many people expecting to switch to this type as away from it, and nearly three out of five current drivers expecting to replace it with the same type.
- Although the bases are small, replacement net gains and losses suggest sports cars, 4x4 off road and people carriers could all increase their shares of the overall market. Luxury saloons remain vulnerable with perhaps one in four of their drivers aged 65+.

Replacement Cars

		Current car % of market	Expect to replace with same type	Expect to replace with other type	Don't know what will replace it
	Small hatchback	22	54%	28%	18%
	Small runabout	19	48%	31%	21%
	Small saloon	15	42%	36%	22%
	Large saloon	15	56%	28%	16%
	Large hatchback	14	44%	37%	19%
	Large estate	5	57%	25%	18%
	Small estate	3	42%	28%	20%
	All				19%

Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Where cars are bought

An estimated 6.4 million new and used cars were bought in 1994 (including 0.6 million directly by companies for their employees). 1.9 million were bought new and 4.5 million were bought second hand, 1.3 million of these from franchise dealers.

- Four out of five *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 is highly consistent with last year's findings.
- One in four *used* car purchases were from used car dealers, slightly fewer were private deals with strangers; friends or relatives accounted for another 19%. Franchise dealers accounted for 28%, seven in ten of these were with a franchise dealer for the same make of car. Overall, the balance between private and trade deals remains about the same as last year.
- Trends by type of trade purchase should be treated with particular caution this year. In previous years a category 'non-franchise dealer selling new and used cars' was presented to respondents and purchase responses ranging from 8% to 14%. This category was dropped this year as it is not possible to have non-franchise car dealers selling new cars. The respondents who might have chosen this category would appear to have spread themselves over the trade categories.
- Those who have older used cars are much more likely to have bought via a private deal and a little more likely to have bought from a used car dealer or a friend or relative. Used cars aged up to three years old are highly likely to have been bought from franchise dealers for that make of car.
- Although bases are small, it does appear that drivers of small runabouts are particularly likely to have bought a second hand car through private deals with strangers – one in three compared with an average of one in five, while drivers of small saloons are likely to have bought a car from a friend or relative. Large hatchback drivers are particularly likely to have bought a car from a second hand car dealer.

Source of Purchase

Total figures

	Annual average over last two years
--	---

Total cars bought	5.8m
-------------------	------

New Cars

Which of these did you buy car from?

Franchise dealer selling only your make	1.1m
Franchise dealer selling more than one make	0.2m
	<u>1.3m</u>

NB This excludes cars bought directly by companies for their employees (0.6m)

Used Cars

Which of these did you buy your car from?

Used car dealer	1.1m
Franchise dealer for your make	0.9m
Private deal	0.9m
Friend/relative	0.9m
Franchise dealer for another make	0.4m
Car auction	0.1m
Gift/other	0.2m
	<u>4.5m</u>
(Any franchise)	(1.3m)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Which of these did you buy your car from?

New cars		1989	1990	1991	1992	1993	1994
Franchise dealer selling only your make		85%	83%	79%	87%	82%	83%
Franchise dealer selling more than one make		13%	14%	16%	10%	15%	15%

Base: Bought new car in the last two years (173)

Used cars		1989	1990	1991	1992	1993	1994
Private deal		28%	28%	27%	22%	25%	20%
Used car dealer		15%	18%	18%	20%	21%	26%
Franchise dealer for your make		16%	13%	15%	16%	17%	20%
Friend/relative		22%	19%	15%	16%	16%	20%
Non-franchise dealer selling new and used cars		8%	13%	11%	14%	10%	#n/a
Franchise dealer for another make		7%	6%	7%	5%	6%	8%
Car auction		2%	3%	3%	3%	4%	2%
Gift		1%	*	*	1%	*	1%

Base: Bought used car in the last two years (471)

#See text

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How loyal are they to their brand?

Brand loyalty is greatest among new car buyers but is also dependent on the type of car bought.

- 63% of new car buyers intending to replace their car with a new one expect to remain brand loyal compared with 39% of used car owners who intend to replace their car with another used car. Among new car buyers brand loyalty is particularly high for small hatchbacks and runabouts with seven in ten drivers who say they are certain or probably likely to choose the same make again, compared with only around half of small and large saloon and large hatchback buyers.
- Brand loyalty in the used car market is particularly high for large saloons, with half intending to stay brand loyal, and particularly low for small runabouts, with brand loyalty applying to only one in four.

Brand loyalty is markedly greater for those over 54 for both new and used cars

	New replaced with new: Certainly/ probably same make %	Used replaced with used: Certainly/ probably same make %
All cars	63	39
Small hatchback	73	38
Small runabout	72	26
Small saloon	50	40
Large saloon	56	47
Large hatchback	53	40

Base: All who replaced their cars in the last two years (662)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

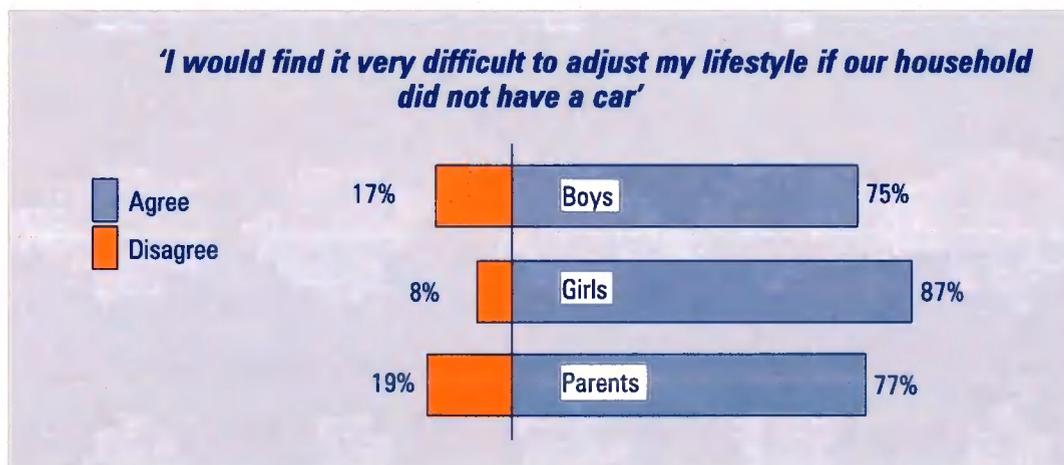
DRIVERS OF THE FUTURE

The young drivers of tomorrow, the teenage children of today's drivers, already see themselves as equally dependent on the car as their parents. They are used to being chauffeured around to and from school and their various leisure activities, and most expect to have their own car before their twentieth birthday. They are realistic about the type of car they expect to be able to afford. However, they are disappointed with their parents' unimaginative choice of vehicles. While they want their parents to buy 4 x 4 off roaders, large hatchbacks, luxury saloons and people carriers, their parents prefer small hatchbacks, runabouts and saloons, large saloons and estates. Looks, speed and economy would be important to the aspiring male driver. His female counterpart is less fussy, placing colour above all other considerations.

How dependent are teenagers on the car?

Children aged 13 to 16 proved to be as dependent on the car as their parents. Although boys are more interested in cars *per se*, girls feel more dependent on them.

- Four out of five teenage children of Britain's car drivers take the view '*I would find it very difficult to adjust my lifestyle if our household did not have a car*'. A similar proportion of their parents took the same view.



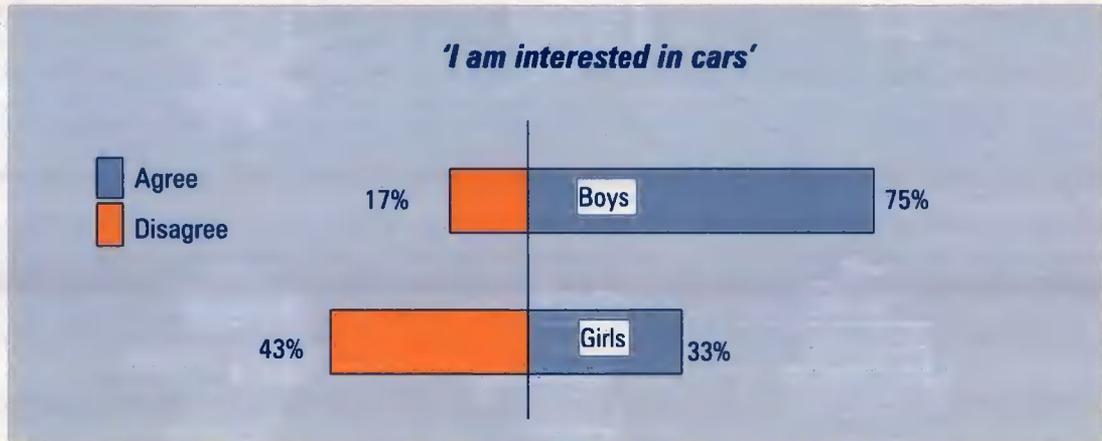
Teenage girls feel more dependent on the car than teenage boys

Base: All children aged 13-16 (141); Boys (59), Girls (82), Parents (123)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist"/MORI

- Although the sub-samples are small, they do show that teenage girls are more dependent on the car than their male peers. Nearly nine out of ten would find lifestyle adjustments difficult compared with three out of four boys.

- Nonetheless, boys are more interested in cars *per se*. Three out of four expressed agreement with the statement 'I am interested in cars' compared with just one in three girls.



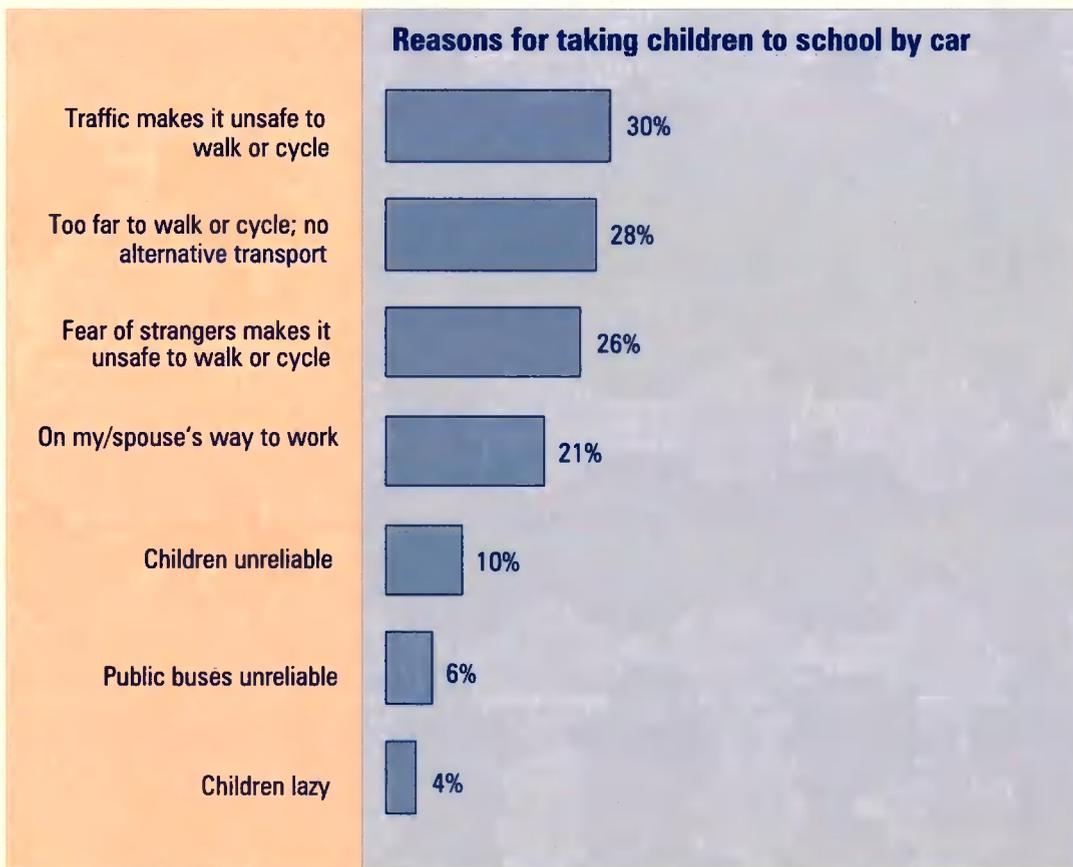
Base: All children aged 13-16 (141); Boys (59); Girls (82)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

The School Run

Children's dependence on the car is underlined by the number of them who are now transported to school by car. A third of households with children and a car now have at least one of their children delivered to the school gates by car every day. Only a quarter of such households never take their children to school by car.

- Normally it is the respondent or his or her partner who drops the children off, although in some cases it is a friend, neighbour or relative. Moreover, where the parents take the children to school, the driver is twice as likely to be the mother than the father.
- The main reasons, for taking children to school by car, have to do with road safety and lack of alternative transport, it being considered too far to walk or cycle or too unsafe to walk or cycle. However, one in four cite fear of strangers as one of the main reasons.
- A significant proportion, more than one in ten parents, regard their children as unreliable and unable to be trusted to get to school, and a small proportion claim their children to be too lazy to go to school under their own steam. Unreliable buses are also blamed by around one in twenty parents.



A quarter of parents cite fear of strangers as a reason for taking their children to school by car

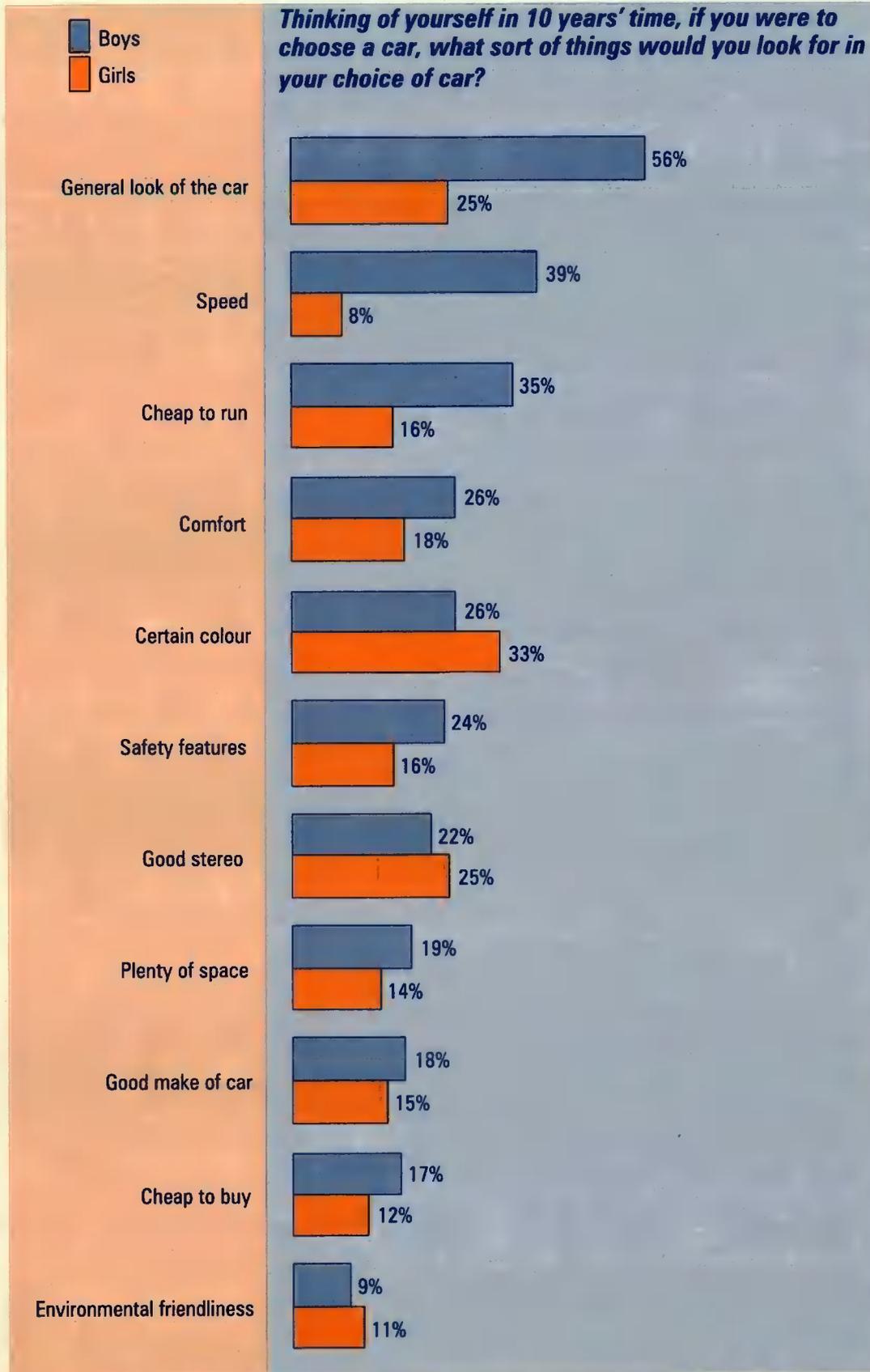
Base: All whose child(ren) are taken to school at least once a week (207)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

What will they look for in their cars?

Teenage boys have a clearer idea than girls of what they would look for in a car in ten years' time. Their main concern is with performance and economy while girls are more concerned with what their car would look like.

- Teenage boys, it seems, have rather more crystallised views of what they think they would want from a car. Over half refer to the overall look and styling; four in ten believe it will have to be fast, while a third believe it should also be cheap to run. A quarter of boys also refer to comfort, safety features, a good stereo and a specific colour.
- Teenage girls are generally less specific, although looks are clearly important. One third mention colour – more than any other factor. The general look/styling and a good stereo are important to one in four girls.
- The *make* of the car is not a major consideration at this age to either group of teenagers.



Teenage boys would look for styling and speed while girls would be more interested in the car colour

Base: All children aged 13-16 (141); Boys (59), Girls (82)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How will they get their first car and what will it be like?

Despite teenage girls' relative lack of interest in cars they are still keen to get their own cars. The average age at which teenage boys and girls in current car driving households expect to own their own car, is nineteen. They expect to meet their ambitions largely on their own, buying initially a second hand car and are realistic about the types of cars they will be able to afford, even if these will not match up to their ultimate dreams.

- Two-thirds of both the boys and the girls in the sample expect to buy their first car themselves; a quarter expect it as a present. No-one expects to have a company car although a small percentage of girls expect to marry into car ownership.
- Only seven per cent of teenagers expect to buy their first car new rather than second hand.
- Most are also realistic about the type of car they expect their car to be. Just over half expect to have a small runabout town car, one in six a small hatchback and one in nine a small saloon. One in twenty expect to own a sports car.
- However, these expectations are a far cry from what they would really like to own. Ideally, approaching half would opt for a sports car if they were old enough to drive, and one in seven would go for a large hatchback or a 4 wheel drive off-road vehicle. Just one in twenty would opt for a small runabout and no other option received many votes.
- Teenager priorities when expressed in their own words range from concern with cost and economy to style, security and the inevitable sound system:

"One that's not too expensive to run"

"Its appearance and performance"

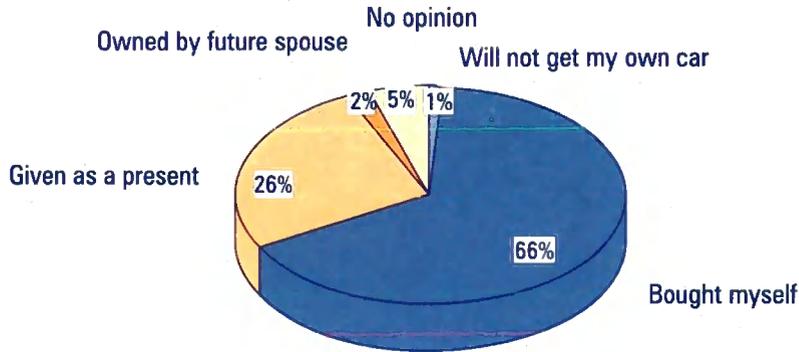
"A car with a phone and power steering"

"Stylish"

"A CD and stereo system"

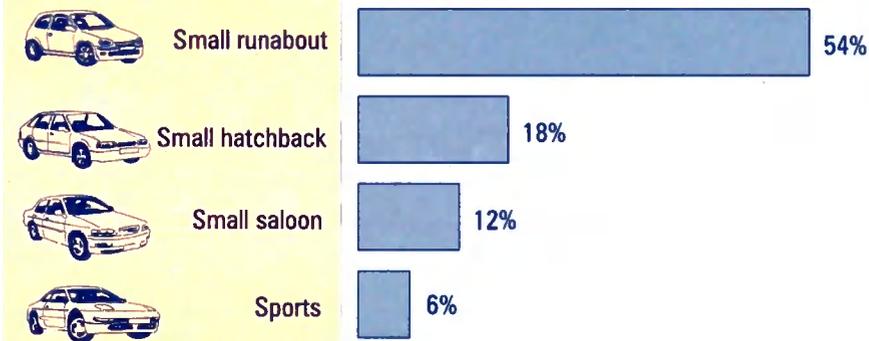
"Good door locks and a removable stereo"

Will your first car be...?

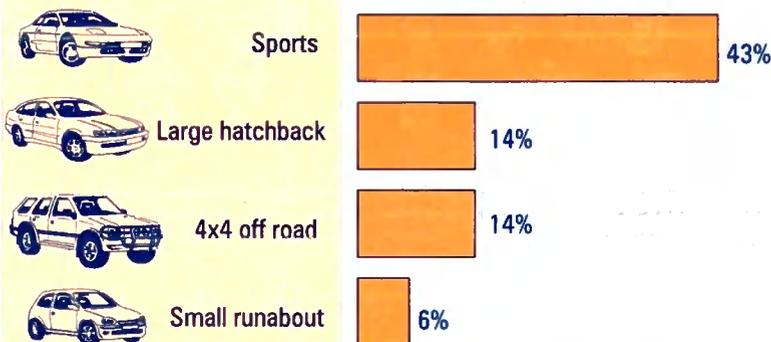


Half of all thirteen- to sixteen-year-olds in households which currently have a car expect to have their own car before their nineteenth birthday

The first car



The ideal



Base: All children aged 13-16 (141)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Seat Belts

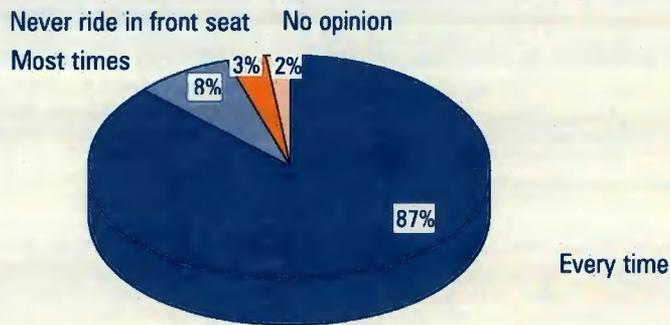
While children are generally conscientious about wearing seat belts when sitting in the front seat, they are rather more casual about wearing them in the back.

- Nine out of ten say they always wear a seat belt in the front seat and most of the rest either do so most times or never ride in the front seat.
- Only half of the children interviewed say they wear a seat belt every time they travel in the back of the car, however, and only a quarter say they wear one most times.

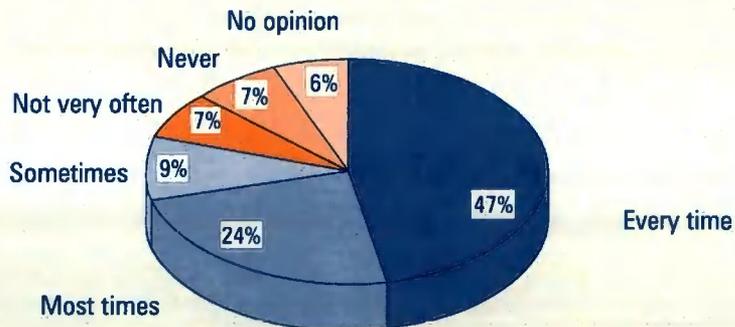
A quarter of thirteen- to sixteen-year-olds only wear a seat belt when travelling in the back seat "sometimes" or less often

When you travel by car, how often do you wear a seat belt?

(a) in the front seat



(b) in the back seat



Base: All children aged 13-16 (141)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

What do they think of their parents' current cars?

Teenagers particularly like the comfort, space and performance of their parents' cars:

"You can sit high up"

"Good music system"

"It's very spacious"

"It's fast off the mark"

"The armrest in the back"

"Electric windows"

"It's very comfortable"

However they criticise the style and lack of adequate sound systems of their parents' car:

"It's too big and ugly"

"It breaks down in the middle of the road"

"It makes me feel sick on long journeys"

"The speakers are not loud enough"

"It's not trendy"

"It hasn't got a stereo"

"No electric windows"

"No sunroof"

"No CD player"

"No central armrest in the back"

"No airbags"

"It rattles"

"The registration number"

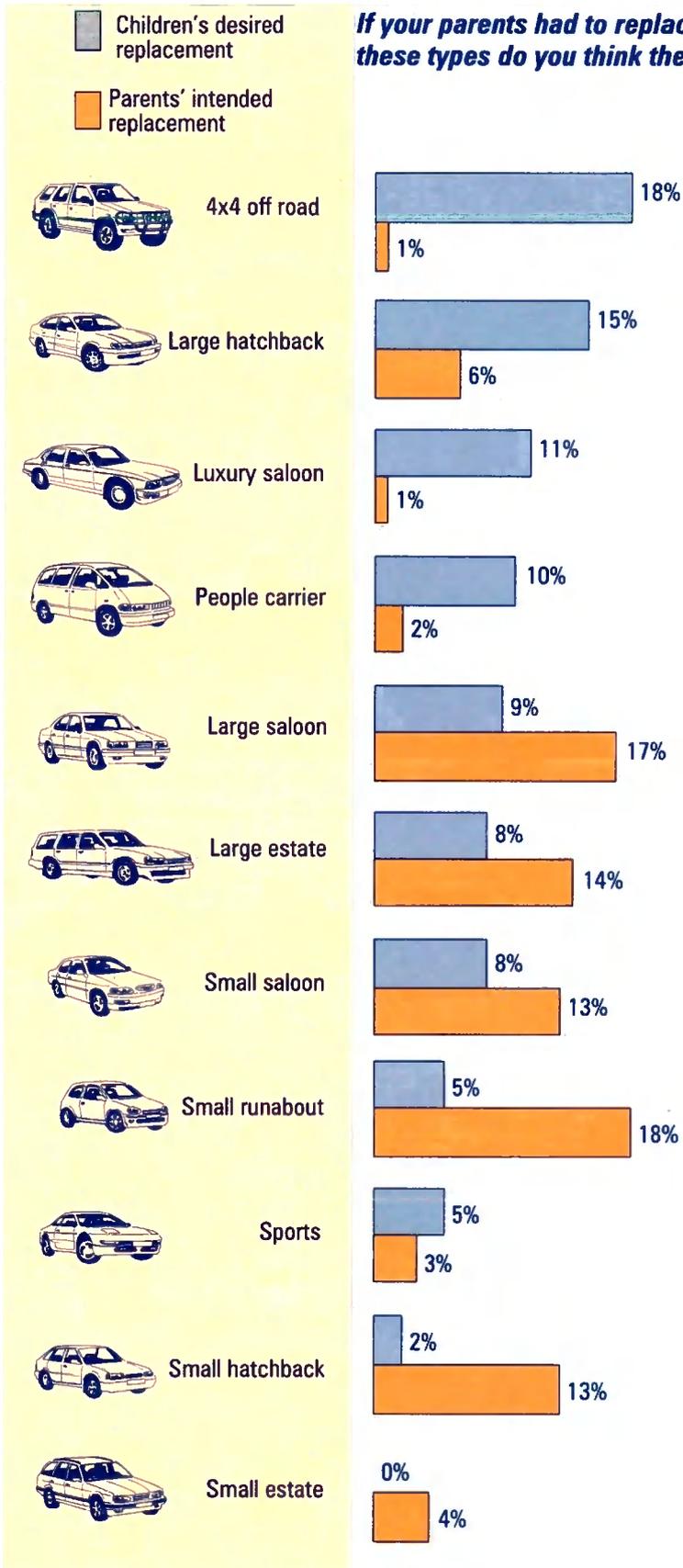
"The wheels are too small"

"It pollutes the environment"

What do they think of their parents' future cars? — the disappointment gap

While teenagers recognise the impracticality of their parents opting for sports cars, they would certainly like them to be a bit more adventurous than they intend to be.

- While the children's main preferred choice is for a 4 wheel drive off road vehicle only one in one hundred parents intend to buy such a vehicle to replace their current main car.
- With the other types of car, children wanted large hatchbacks, luxury saloons and people carriers, whereas their parents intend to opt for large saloons and estates. Their parents, by contrast, expect their replacement cars to be small runabouts, hatchbacks and saloons or large saloons.



If your parents had to replace their car, which of these types do you think they should replace it with?

While the kids want their parents to buy 4 wheel drives, large hatchbacks luxury saloons and people carriers, their parents prefer small hatchbacks, runabouts and saloons, large saloons and estates

Base: Children aged 13-16 (141); All parents who will replace their car (122)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI





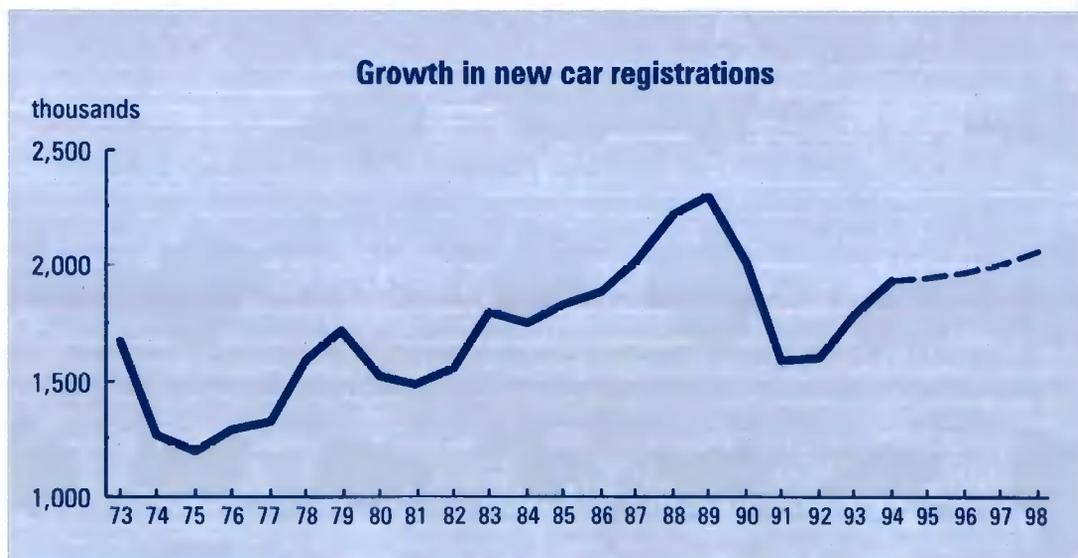
*What's Driving Car Retailing?
Henley Centre for Forecasting*

GROWTH IN NEW CAR SALES

How will new car sales grow?

New car registrations are forecast to increase by around one fifth between 1993 and 1998.

- The Henley Centre, as part of the Lex Report on Motoring 1995, has modelled new car sales in the UK, using econometric techniques. It found that the key drivers of the market are: discretionary income, mortgage debt, change in unemployment and company profitability.
- With discretionary income predicted to rise only marginally in 1995 and with the rate of fall of unemployment slowing, the model predicts that new car sales in 1995 will rise slightly, before returning to stronger growth in 1996.
- Research into the views and expectations of consumers shows:
 - people are remaining cautious about spending, with the threat of unemployment remaining high and people increasingly saving in one form or another against possible bad times.
 - However, car owners are expecting to increase the number of cars they own over the next two years.
 - The main reasons that people change their cars are: because their car is becoming less economic to run, just fancying a change and habit, changing after a set number of miles/period. With cars becoming increasingly reliable and consumers remaining anxious about their personal finances, we expect car replacement cycles to improve but they are unlikely to return to pre-recessionary levels.

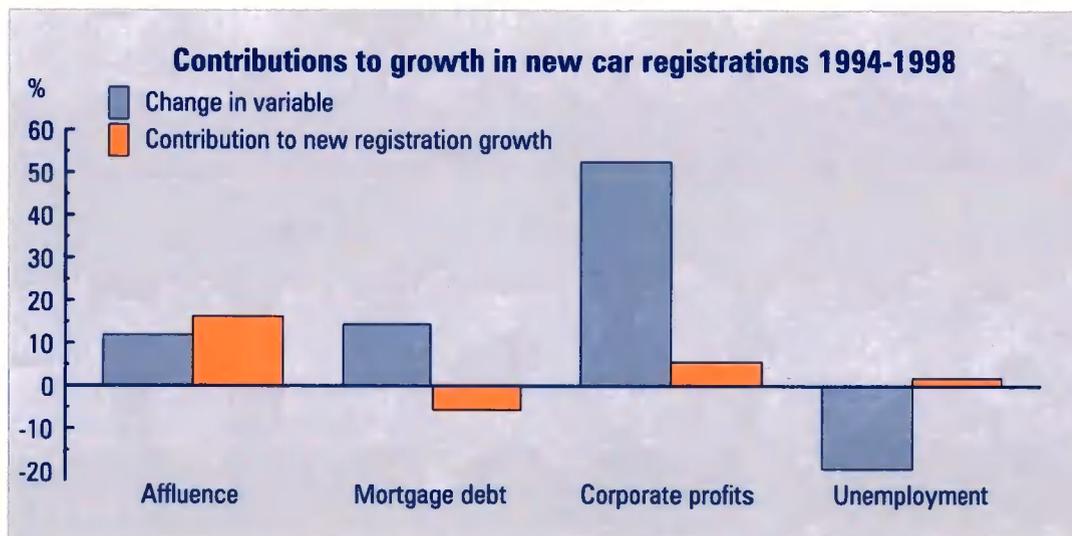


Source: The Henley Centre/SMMT

What will drive the growth?

The key drivers of new car sales are discretionary income, change of unemployment, mortgage debt and corporate profitability.

- The Henley Centre modelled the historic performance of the UK car market using econometric techniques. This statistical technique allows hypotheses to be drawn on the key drivers of the market and the relative importance of each factor. The model can then be used to predict future performance of the market, given forecasts of economic change.
- The key drivers of the car market are:
 - Discretionary income: which is the amount of money the average person has in their pocket after spending on tax, housing, fuel, food and insurance has been deducted.
 - Change in unemployment: this is often important as a measure of general consumer confidence, as well as a measure of the number of people with money to spend.
 - Mortgage debt: the level of mortgage debt is an important measure of the feel good factor, as well as a measure of available money.
 - Corporate profitability: this is key, given the importance of company car sales. Corporate profitability is more volatile than measures of consumer income.
 - Company car taxation: this has increased significantly over the past few years and had a one-off negative effect on the market.



Source: The Henley Centre

Corporate versus private demand for cars

The prospects for corporate sales look good in the short-term.

- Henley Centre economic forecasts have been put into the econometric model to forecast sales of new cars.
- Growth in the fortunes of the average individual will remain muted. Employment is expected to grow only slowly, which will mean that wage settlements will remain low. There will be increases in both taxation and interest rates over the forecast period, as whichever government is in power attempts to control the public sector deficit.
- The corporate sector suffered during the recession, but is expected to see good growth in profits throughout the forecast period. This growth in profits will be driven by increases in demand, but also from growth in productivity. These productivity gains will be achieved through investment in technology and low wage settlements.
- The result of this economic scenario is slow but positive growth in demand for new cars over the next two years. We believe much of this growth will be in the company car market, but that growth will not be quite as strong as we would have seen in the past, given a similar set of economic conditions, as companies will not be employing large numbers of new staff, particularly in middle ranking and junior positions, and the recessionary 'mindset' is retained even in the 'good times'.
- From 1996 we expect growth in new car sales to improve with sales exceeding two million by 1997.

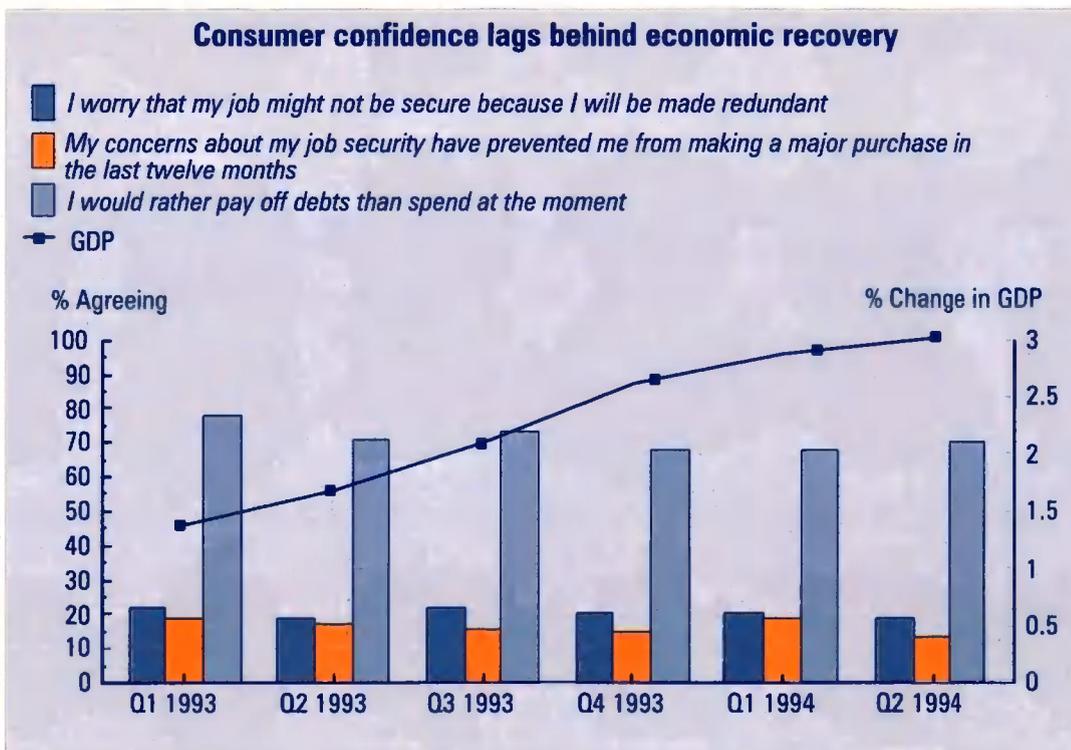


Source: The Henley Centre/CSO

The effect of the recession

The recession has created caution amongst consumers.

- Research amongst the public in general and motorists in particular shows that consumer sentiment supports the conclusion derived from the econometric model, that growth in demand for new cars will be positive but slow in the short term, although longer term prospects will be brighter.
- The assumption historically has been that creating conditions of economic growth, falling employment and low interest rates, will create consumer confidence. These conditions exist in the UK, yet consumer confidence is remaining low.
- Consumers are indicating that they would prefer to pay off debt and defer major purchases, rather than switch into post recessionary spending mode. In the car sector, of those households who have increased the number of cars they have over the past year, only one in twenty did so because of increases in income or from having a greater feeling of confidence. The majority were driven by a functional need for another car – such as starting a job where a car was needed, or because of the needs of a growing family. There has, however, been an increase in the total number of households with a car.
- This lack of confidence is caused on the one hand by ‘temporary’ factors, such as the continuing high levels of unemployment and redundancy and for a significant number of people the level of negative equity on their houses. There are also structural reasons which may affect it in the much longer term, such as the decline in ‘job for life’ employment policies and the increasing recognition of the need to privately provide for pensions, health and schooling, particularly amongst the middle-classes.

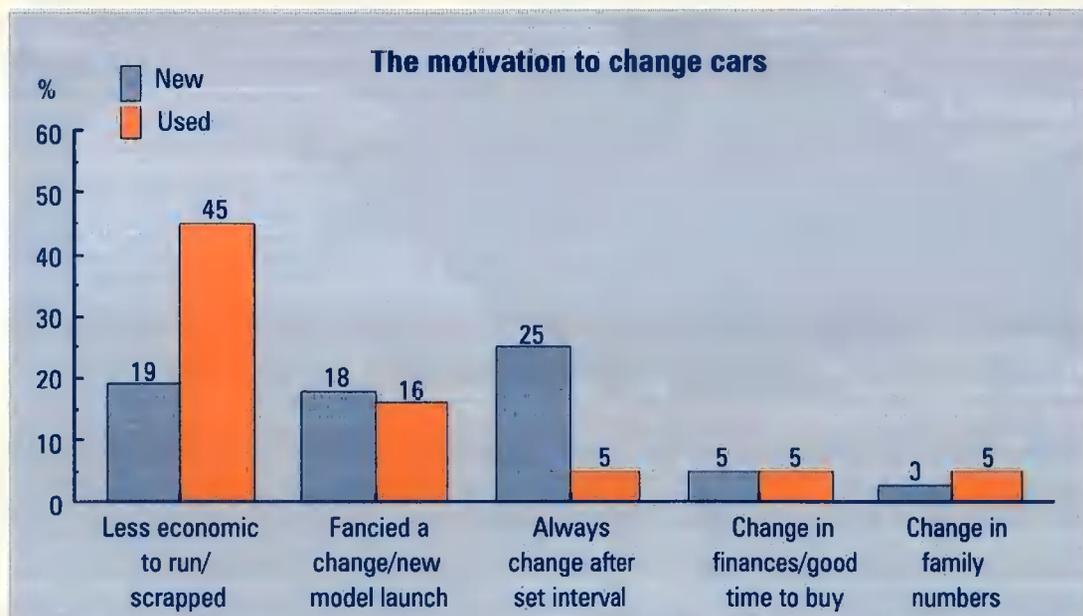


Source: The Henley Centre/CSO

How often will they change their cars?

Replacement cycles are unlikely to return to pre-recessionary levels.

- Much of the change in new car sales seen during and after the recession can be explained by changes in the length of the replacement cycle of existing motorists. In the chart we show what triggers existing motorists to change their car.
- We believe that the rate at which these triggers operate will increase significantly but we are unlikely to return to the short replacement cycles of the late eighties. The reasons behind this assumption are both technology and consumer related.
- Consumers who were forced into lengthening replacement cycles during the recession have found that cars are becoming more reliable and in the current unflamboyant consumer atmosphere will react rationally to this experience by maintaining longer replacement cycles.
- The atmosphere of consumer caution and anxiety that we highlighted earlier means consumers are less likely to change their cars on a whim. There will always be a 'blow it' factor in the market (Henley research shows over 50% of consumers agree that 'Sometimes I just think "to hell with it" and splash out and buy something'), but it will be diminished.
- The Henley Centre has prepared a behavioural forecasting model for Lex Service, which looks at the impact of the changing consumers' lives on new car sales, using questions such as the one highlighted above, as well as an econometric approach. The two alternative approaches produce very similar results – namely slow but positive growth in the next few years.



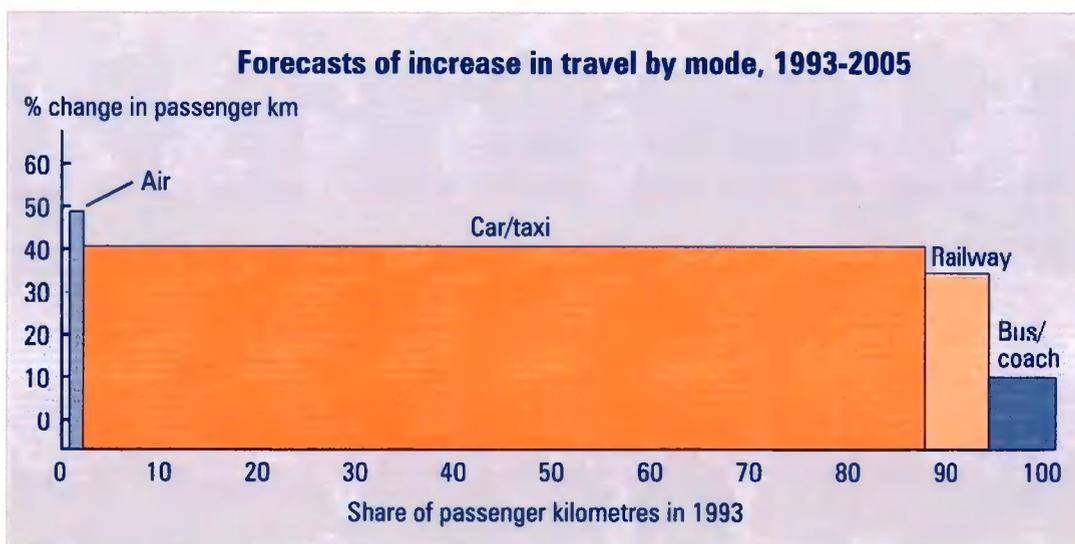
Source: 1995 Lex Report on Motoring "What Drives the Motorist?"/MORI

RESPONDING TO ENVIRONMENTAL CONCERN

How will travel patterns change?

Environmental concern will drive improvements in fuel technology – people will not give up their cars.

- Environmental concern fell during the recession and consumers believe manufacturers and governments should take responsibility for these issues. Consumers want improved environmental performance, but at no extra cost and with no deterioration in performance.
- Congestion, rather than the environment, is the key issue for many motorists, but they appear to be losing faith in the ability of road building to solve congestion problems.
- Support for public transport has risen and there has been a rise in the use of public transport amongst motorists. We believe this only occurs when it is more convenient and they will not give up their cars. The aspiration to own cars remains very high amongst motorists, non-motorists and children. As a result, car travel is set to increase despite increased congestion.
- In the longer term fuel technology will, we believe, be the route by which consumers feel that they are being environmentally responsible – even if their main motivation will be money saving. Diesel has grown phenomenally on this basis over the last five years. Awareness of alternative fuel technologies is low and there are concerns currently about poor performance – even though their environmental worth is well established.

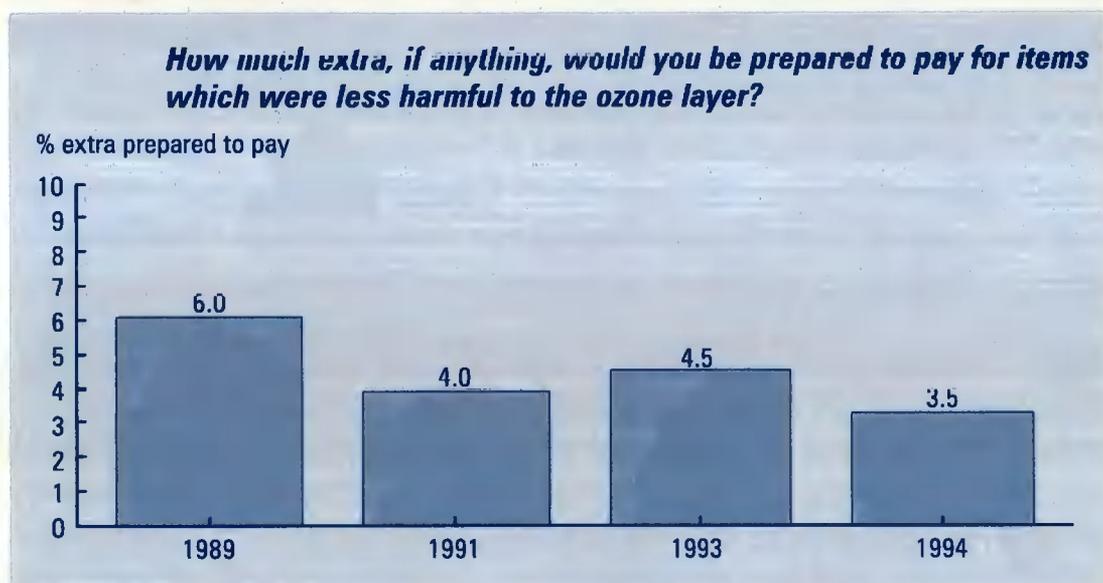


Source: The Henley Centre/ Department of Transport

How strong is concern for the environment?

Concern for the environment remains high, but willingness to pay for green consumption has diminished.

- Concern for the environment is mostly expressed through 'buying green'. Only 4% of voters in the local elections in 1994 were influenced by environmental policy (Source: MORI) and only 3% of people are members of environmental organisations – compared to 5% for charities and 13% for religious organisations.
- Henley Centre research shows that concern for the environment, as expressed via green consumption, has dropped during the recession. Economic hardship seems to have focused consumer concern on issues like financial security and prices. For example, according to Henley Centre research, the proportion of people who say that environmental concern always or mostly influences their purchasing fell from 45% to 35% between 1993 and 1994 and as the chart below shows people are now less willing to pay for environmental performance.
- However, there is evidence to suggest that consumers remain very concerned about the environment when it affects them directly – such as when it might have an impact on their health. Concern about the impact of pollution on health has increased consistently since 1984 and particularly dramatically in recent years. The proportion of people citing pollution as 'bad for your health' increased from 77% in 1991 to 85% in 1994 (Source: Henley Centre).

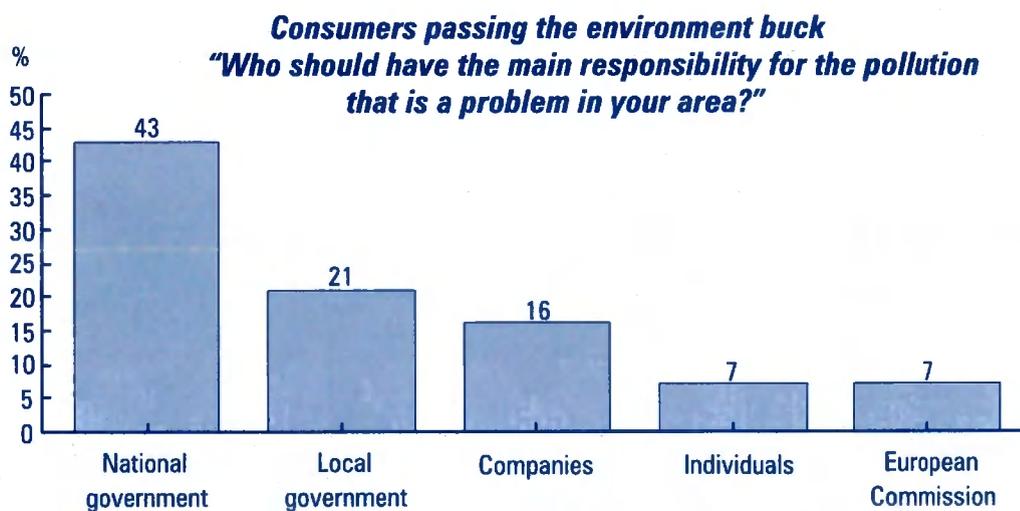


Source: The Henley Centre

Who should be responsible for the environment?

Consumers expect government and manufacturers to take responsibility.

- The chart indicates the degree to which consumers deny personal environmental responsibility and believe that government and, to a lesser extent, companies should take responsibility for these problems.
- However, consumers are increasingly cynical about companies' motives. For example, Henley Centre research shows the proportion of people who agree that 'companies only make environmentally friendly products because they can charge more for them', has risen from 46% in 1992 to 57% in 1994 and the proportion of people who agree with the statement that 'companies will only improve their environmental practices if forced to do so by law' increased from 69% in 1992 to 81% in 1994.
- The ideal solution is for a company to market products which are less harmful to the environment, function as effectively as competing products and cost no more – or, ideally less – than competing products. Arguably this has been the key to the success of unleaded petrol.
- In the car market this means that motorists are unlikely to forsake much in the way of convenience, performance and cost for the environment. They will, however, accept and welcome improvements which do not demand compromise in these areas.



Source: The Henley Centre

THE ROLE OF PERSONAL SERVICE IN CAR RETAILING

Competitive advantages in car retailing

Success in car retailing will increasingly be determined by service.

- Service and the establishment of customer relationships is becoming a crucial source of differentiation in consumer markets, where products are increasingly homogenous and consumers increasingly sophisticated. One of the key aspects of service that consumers find attractive is convenience – this is particularly true for those on higher incomes. Another key aspect of service is the reduction in anxiety around transactions where the consumer lacks knowledge.
- A key aspect in choice of distribution point for new car sales, used car sales and car service and repair is personal service.
- With consumers remaining anxious about their personal prospects, an increasing proportion may trade down from new to used – an increasing number of these will buy their used cars from main dealers.
- Despite rises in company car taxation, there has been little exodus from company cars as the less tangible benefits of anxiety relief and status have maintained its attractiveness – levels of service that dealers offer company car drivers is thus helping to maintain this market.
- Service intervals are lengthening as consumers tighten their purse strings and cars become more reliable – an increasing proportion of these, however, are going to main dealers for repairs, with the quality 'guarantee' this provides.



Source: Lex Report on Motoring, 1989-1995

The importance of service

Personal service is an increasingly important element of competitive advantage.

- Normally one would expect the experience of recession to have a dual impact on consumer expectations. First, we would expect to see an increase in price sensitivity as consumers are forced to tighten their belts. This has been observed in most consumer markets. Second, we would expect their service expectations to decline as they are more pre-occupied with the economic essentials. However, The Henley Centre's research shows that there was no lowering of service expectations, indeed it rose in some sectors.
- Service and the establishment of customer relationships is becoming a crucial source of differentiation in consumer markets, where products are increasingly homogenous and consumers are increasingly sophisticated. The chart above shows that a clear majority of consumers are in favour of companies building relationships with their customers by asking their views on current products and services, on new products and services and by simply keeping in touch.
- These trends will have a big impact on the car industry. Motorists will be demanding increasingly high levels of customer care and service, as well as keen pricing. Customer service will be a key aspect in the choice of distribution point for new car sales, used car sales, car servicing and repair. Success will result from providing the appropriate mix of price and quality service.

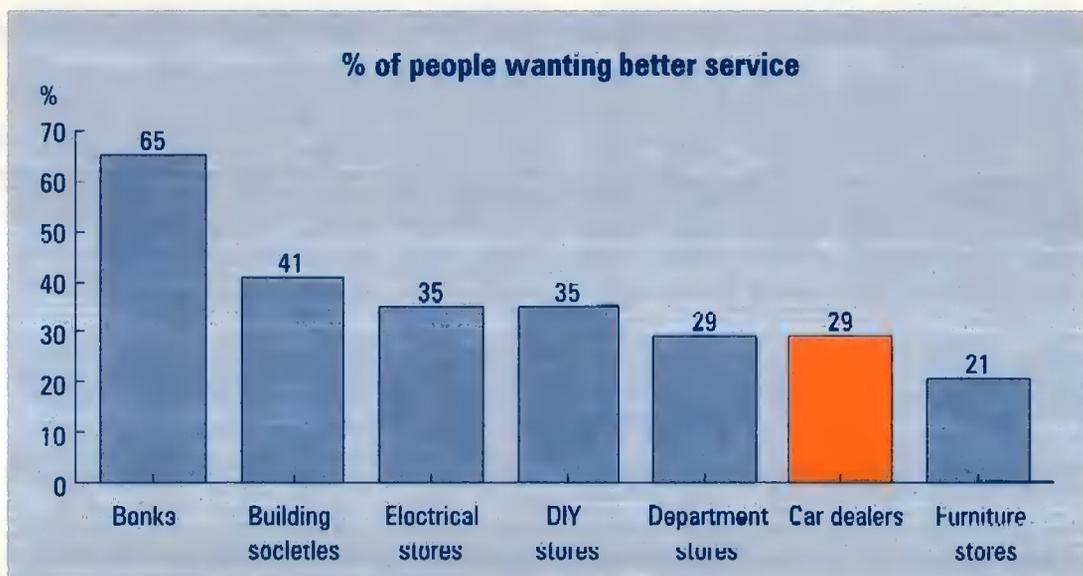


Source: The Henley Centre Teleculture 2000 report

Key service attributes

Key service attributes are convenience and anxiety relief. Car dealerships compare favourably to other providers of 'big ticket' items.

- The chart suggests that car dealers, though they have no room for complacency, are doing better than many other providers of big ticket products and services in terms of the customer service they provide. Almost two-thirds of bank customers feel that banks should offer better service, whereas less than 30% of car dealership customers feel that they should offer better service.
- There are two key aspects of service that consumers will find increasingly attractive. First, is convenience, which is particularly important for those on higher incomes who are likely to form the bulk of new car buyers. Branded main dealers have an advantage over their competitors when it comes to convenience because they offer a one-stop-shop from purchase through to after-sales care.
- The second key aspect of customer service offered by branded main dealers is higher reliability and assurance in a market where people have traditionally felt anxious. They do this if they are companies in which customers can trust. The dealers also have a relationship with the manufacturers which lends them further credibility.

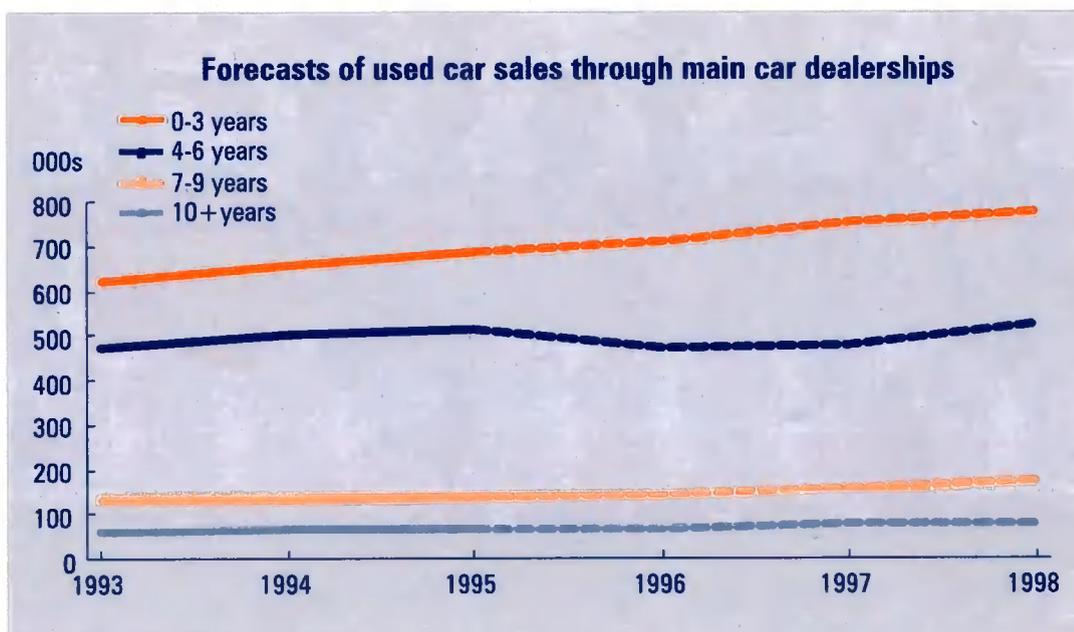


Source: The Henley Centre

Used car retailing

Used car sales will increasingly go through main car dealers.

- With consumers remaining anxious about their personal prospects a proportion may trade down from new to used cars. An increasing number of these will be bought from branded dealers. Data from the Lex surveys show that until the recession there was a growing trend for used cars to be bought from commercial outlets rather than privately. This trend was halted by the recession as car buyers placed increased emphasis on price.
- With recovery underway we expect the pre-recessionary trend to slowly re-establish itself. This is because:
 - The increased technical complexity of cars will encourage consumers to look for some guarantee of reliability and quality. Branded dealers are in the best position to offer this type of guarantee.
 - The commonplace nature of car ownership and the complexity of interests in people's lives, leaves most people with little interest in investing a lot of time in the purchase process. This creates demand for 'edited choice'. Again, branded dealers are in a good position to benefit from this as they are large enough to offer a large selection of cars of 'guaranteed' quality under one roof.
 - Used car buyers will want to make use of the extended warranties available on used cars bought from branded dealers.

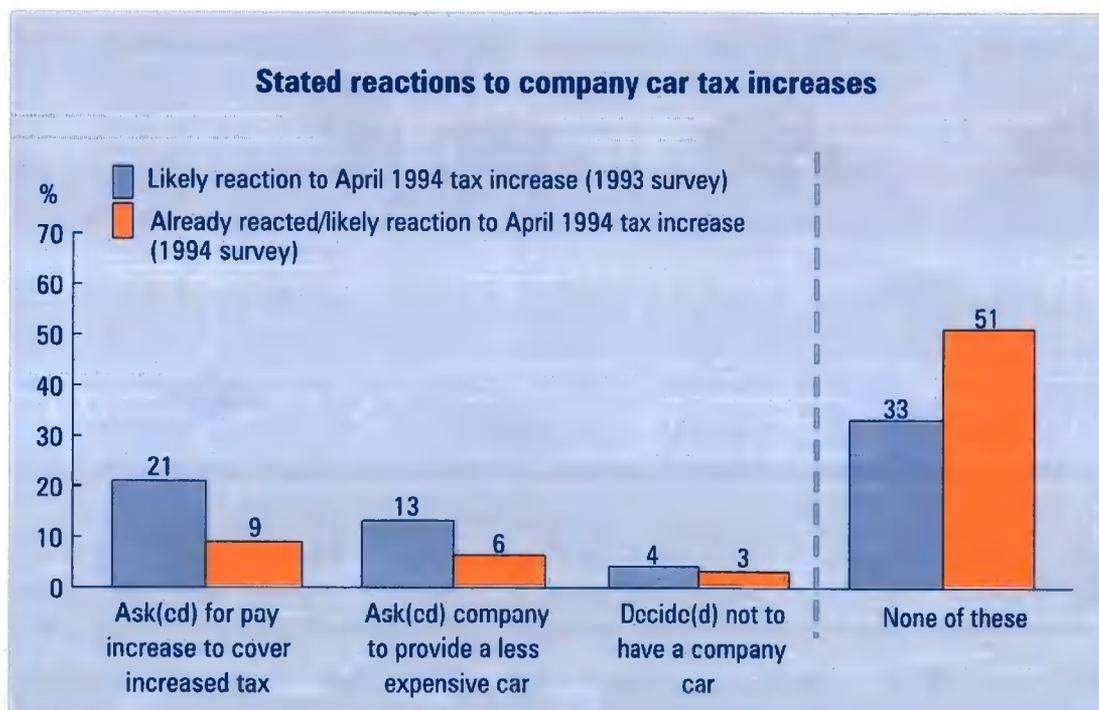


Source: The Lex Report on Motoring/The Henley Centre

Service and the company car

Aspects of service are helping to bolster the company car market.

- Despite increases in company car taxation, there has been no real exodus from company cars. The main explanation for this is that for most company car owners, the car is essential for their job – in this year's survey seven out of ten said their company car was essential.
- We believe, however, that some of this inertia can be explained by the stress and anxiety relief that the company car provides. The Lex surveys of this year and last year have asked company car drivers about their likely and actual responses to the April 1994 tax changes. As the data in the chart shows, company car drivers are now less extreme in their response to the changes than they were last year – this changing sensitivity is, we believe, a reflection of the increased awareness of the non-economic benefits of the company car.
- The level of service that car dealers offer company car drivers is thus helping to maintain this market. Seamless, effortless and cost free service is a major bonus to any car owner, but it is a 'free' benefit to company car drivers, that the private car owner can often not afford. Thus it represents a major competitive advantage in this market, from purchase through to all aspects of after-sales care.



Source: 1995 Lex Report on Motoring "What Drives the Motorist?"/MORI

Factors affecting service location

The after-care market will be growing slowly, but dealers will get an increasing share of the pie.

- The Lex survey has been monitoring various aspects of the after-care market since 1988. It has consistently found that service intervals are lengthening. This has been due to consumers tightening their purse strings, but also the increased reliability of cars and the resultant increase in recommended service intervals. The impact of these developments will be to restrict growth in the after-care market.
- Branded main dealers are well placed to increase market share, however. There are several reasons for this including:
 - The increased complexity of cars reducing the capacity of anyone other than the manufacturer to carry out repairs and servicing – particularly affecting the DIY market.
 - The increased prevalence and observance of warranties working in the favour of branded main dealers. This will be increasingly important as a car's value is more closely associated with a full-service history and as used car buyers look to take advantage of extended warranty options. This year's Lex survey found that 67% of motorists keep a record of every service and repair that their car has had.
 - broader social and economic pressures working in favour of branded main dealers. Increased time pressures will mean that motorists are increasingly looking for the convenience of a one-stop-shop for all their motoring needs. Also as economic recovery becomes more firmly established, the increased focus on service and quality over price is likely to work in favour of branded main dealers.

	DIY	Work shop	Own brand dealer	Other brand dealer	Service centre	Friend	Mobile unit
Reversal of short-term recessionary effects	–	–	+			–	
Increasing value of time	–	+	+	+	+		++
Falling interest in cars	--	+	+	+	+	–	+
Increasing complexity of cars	--	–	++	–	–	–	–
Stricter warranty deals	–	–	+	–		–	
Value consciousness		+			+		
Supply-side activity					+		+
Increasing reliance on cars					+		+
Stricter MOT	–	+	+	+	+	–	+

Source: The Henley Centre





Car Buying and Servicing

CAR BUYING

Around 5.8 million cars are bought each year by individuals (ie excluding cars bought by companies for their employees), 1.3 million of them from new. The total market is worth some £33 billion of which over £13 billion goes to franchise dealers for new cars and some £9 billion to franchise dealers for used cars. The market is dominated by small car sales which account for around two out of three of both new and used car sales. Buyers are probably fairly traditional in the way they buy and select their cars. However, the research suggests that a significant proportion of new car buyers would be willing to try a virtual reality approach to finding the car they liked when this technology becomes available.

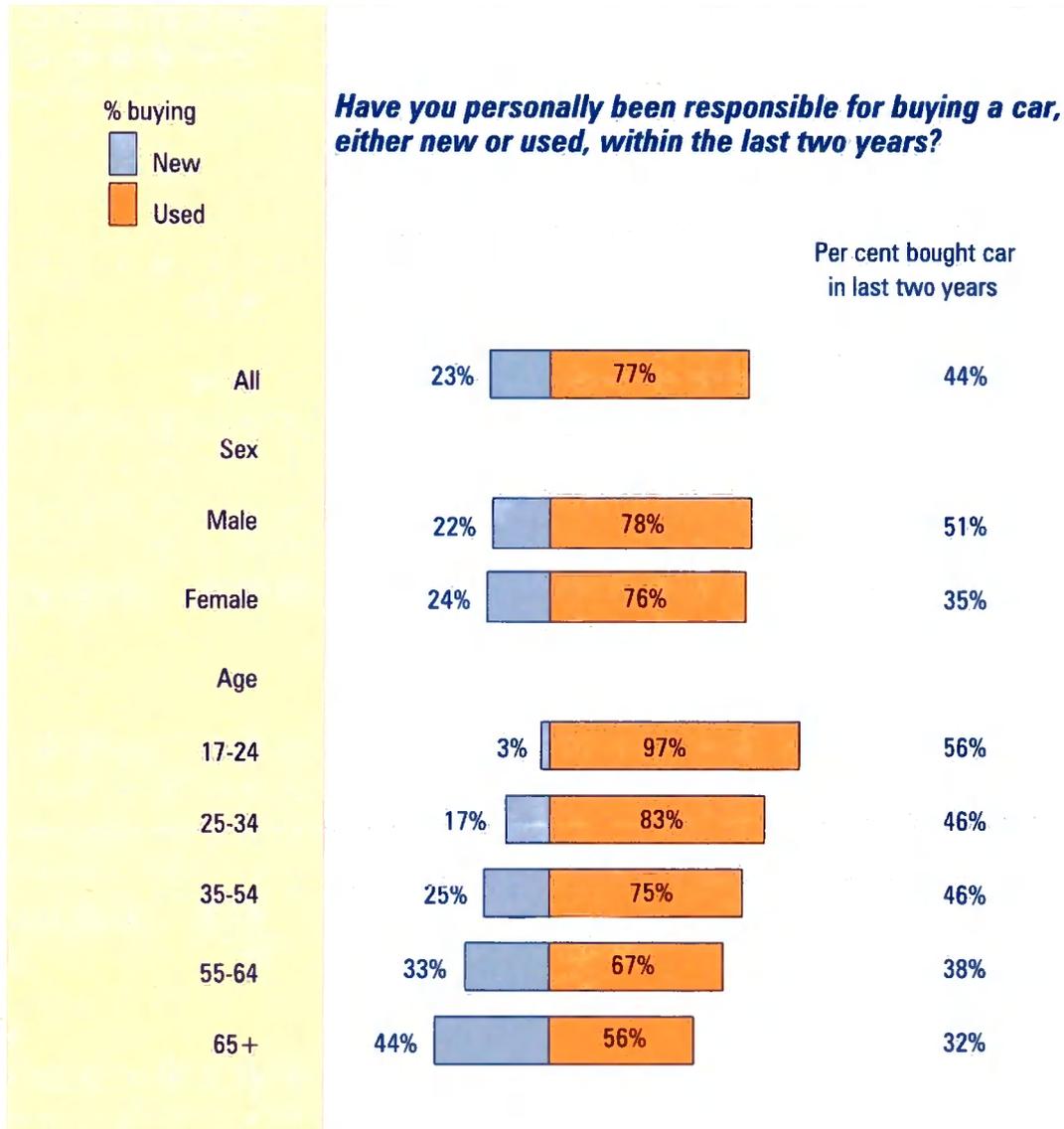
This section continues the trends of earlier editions of the Lex Report on Motoring. More detailed research on the buying process has been carried out in previous years and can be referenced through the seven year index on page 148.

Car Buyers

Over four out of ten drivers (or 11.5 million people) have bought a car in the last two years – 2.6 million bought new cars (23%) and 8.9 million bought used cars (77%).

- The continuing low proportion of new, relative to used, car purchases gives support to the view that the recovery remains sluggish.
- Young people are the most likely to have bought a car in the last two years – 56% – but virtually all of them were used cars.
- Older people, although less likely to have bought cars (32%) are much more likely to have bought new ones.
- 44% of new car buyers are aged 35-54; 32% are aged 55 or over, while 24% are under 35.

For used cars the pattern is very different: 44% are aged under 35, 40% are aged 35-44 and 16% are 55 and over.



Base: All drivers (1,519)

	1989	1990	1991	1992	1993	1994
	%	%	%	%	%	%
Proportion of drivers who bought car in last two years	44	45	45	44	47	44

Base: All drivers

Proportion buying:

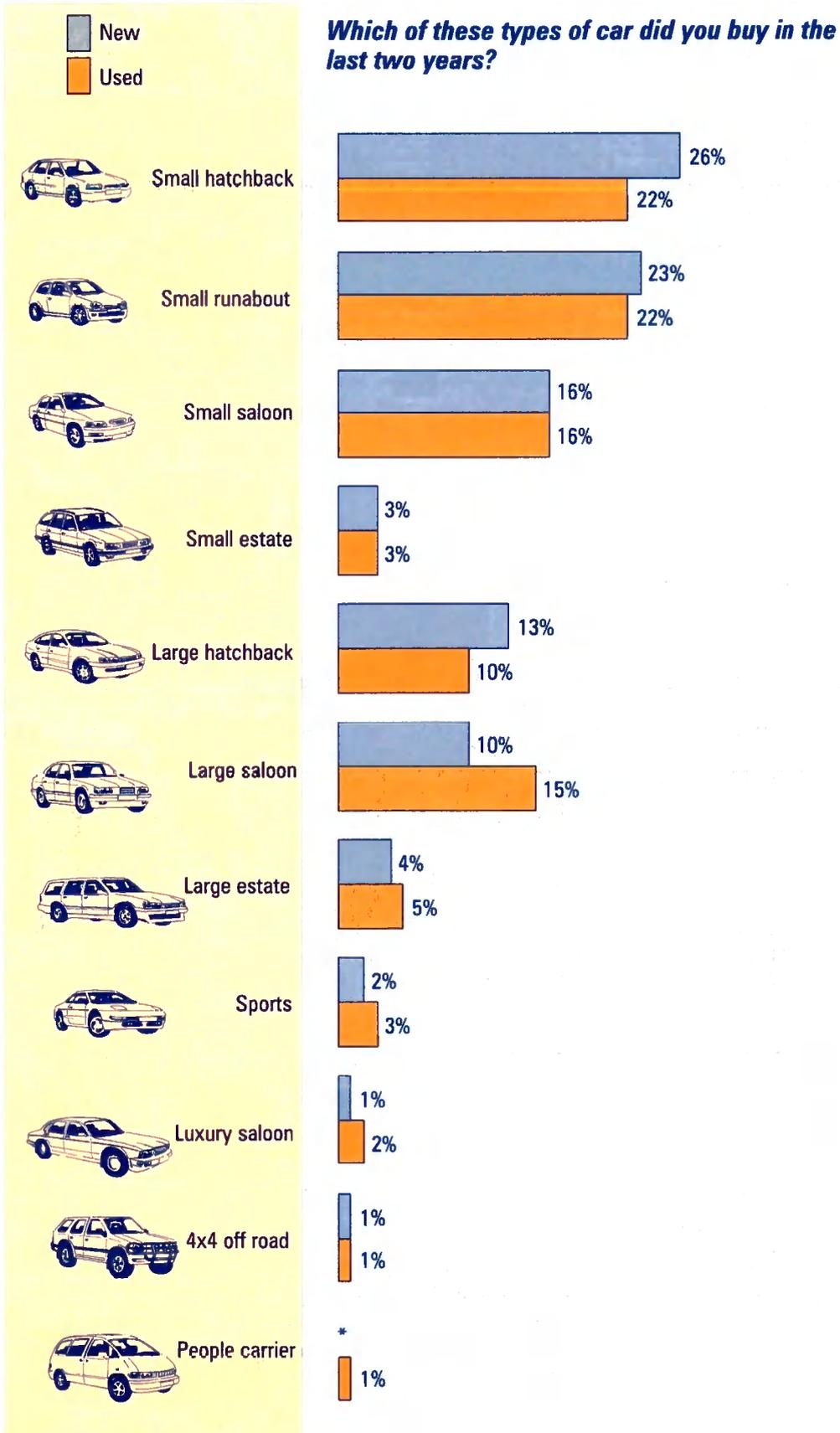
New	30	28	24	22	25	23
Used	70	72	76	78	75	77

Base: All buying car in last two years

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

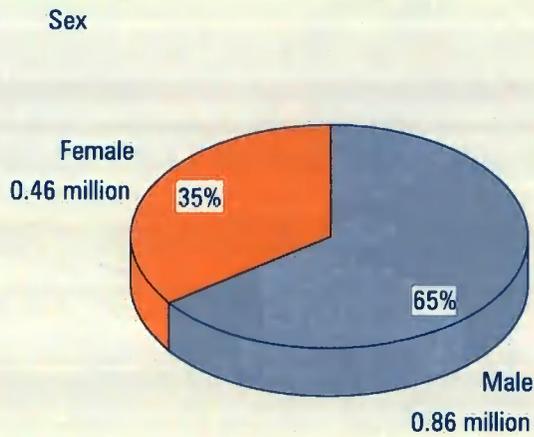
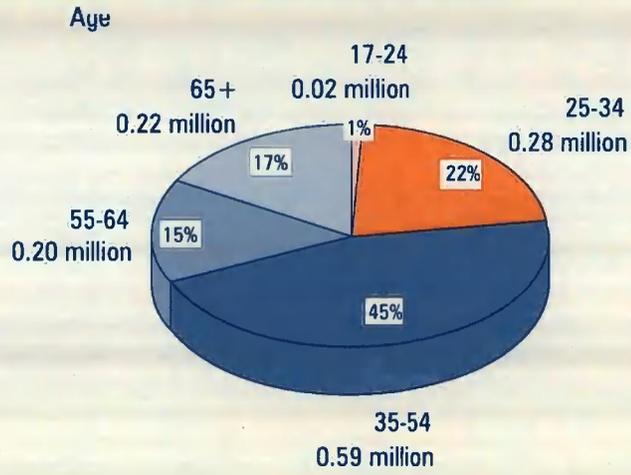
Both the new and used car markets are dominated by the demand for small cars. Around two out of three cars bought in the past two years were small cars.

- A quarter of new buyers bought small hatchbacks and another quarter small runabouts. One in six bought small saloons. This excludes those whose company provided them a car directly which would tend to be larger cars.
- The used car market is slightly more skewed towards larger cars reflecting ex-company cars, bought directly by companies rather than individuals, coming into the used car market.
- Thus the ratio of small to large cars among new car purchases is 2.4:1 compared with 2.1:1 among used car purchases.



Base: All who have bought a car in the last two years (662)
 Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Profile of new car buyers*



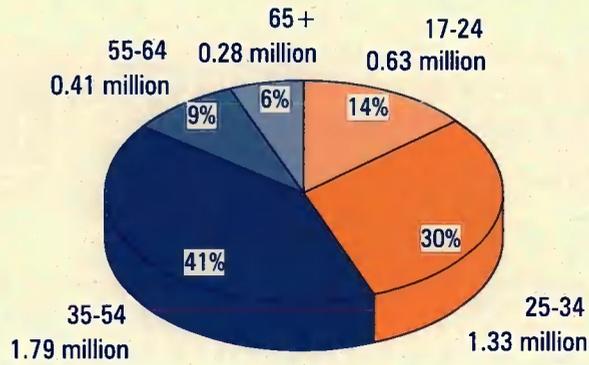
Base: All bought new car in last two years (175)

* Excludes cars provided by companies

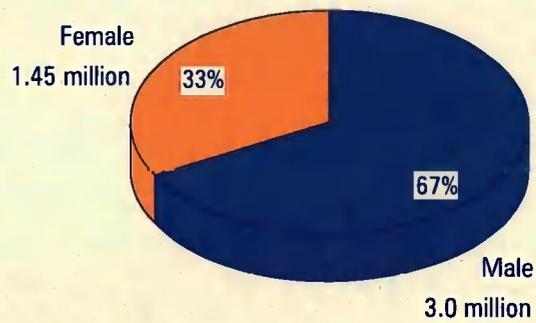
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Profile of used car buyers

Age



Sex



Base: All bought used car in last two years (474)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

The purchase cost of cars

The average purchase price of cars has risen by around 3% in the past year, roughly in line with inflation.

- The average price paid by buyers of new cars over the last two years was around £10,200.
- The average price paid by buyers of used cars over the last two years was £3,800.
- Used cars bought from new car dealers attract considerably higher prices than used cars bought from second hand car dealers.
- Cars bought privately and by private buyers through auctions yielded the lowest prices, almost certainly reflecting the greater age of those cars.

Car Purchase Cost

	Average Cost		
	1992	1993	1994
	£	£	£
All cars	4,700	5,500	5,700
New	9,100	9,800	10,200
Used	3,200	3,700	3,800
Car bought privately			
New	8,200	8,800	9,000
Used	3,100	3,500	3,700
Company car households			
New	13,100	13,000	13,800
Used	5,900	7,800	8,500
Age of driver			
17-24	3,000	3,000	3,100
25-34	4,200	4,800	5,100
35-54	5,000	6,400	6,100
55-64	5,700	6,400	6,900
65+	5,300	5,500	6,000
Source of Purchase			
Used car			
- private individual, did not know		1,800	2,500
- friend/relative		1,900	2,400
- dealer, only used cars		3,600	3,800
- new car dealer, your make		7,300	7,300
- new car dealer, another make		4,600	5,200
- auction		3,000	2,500

11.2
3-4.2

Base: All drivers

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

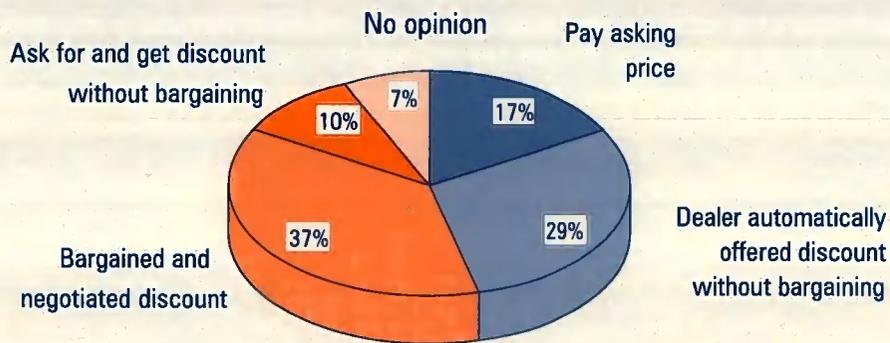
The buying process – discounts

When buying a new car, most buyers prefer a lower basic price. However, relatively few buyers end up paying the asking price.

- Of those who had bought a car in the last two years, only 17% of new car buyers and 29% of second hand car buyers have paid the asking price.
- For over a quarter of new car buyers, the dealers offered a discount without being asked, although this was less common for used cars. Around half of all buyers asked and got a discount, most of these had to bargain to get it.
- Second hand car buyers who drive fewer than 6,000 miles per year were particularly likely to pay the asking price without bargaining.

When you last bought a car, did you...?

All who bought new



Base: All who have bought a new car in the past two years (175)

All who bought second hand

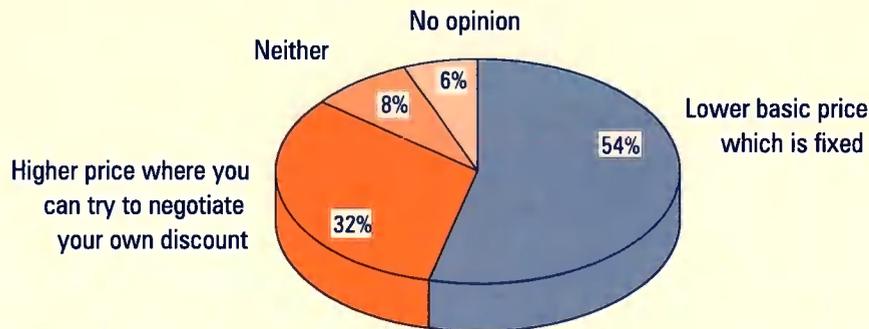


Base: All who have bought a second hand car from a dealer in the past two years (259)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

- Most car buyers would prefer to have a lower basic price which is fixed than a higher price where they negotiate their own discount. However, there does seem to have been some shift toward negotiating their own discounts since the question was last asked in 1991.

When buying a new car would you prefer to be offered a . . .



Base: All who have bought a new car in the past two years (175)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

How cars are financed

The methods of financing are similar for both new and used cars, with the majority of cars being bought by cash or loans from the family.

The methods of financing have remained stable over the past five years. This year 'contract purchasing' (Ford Options and Vauxhall 1-2-3) has been introduced as an additional method accounting for 9% of new cars. Fuller details are given in the appendix, page 131.

Shopping by virtual reality

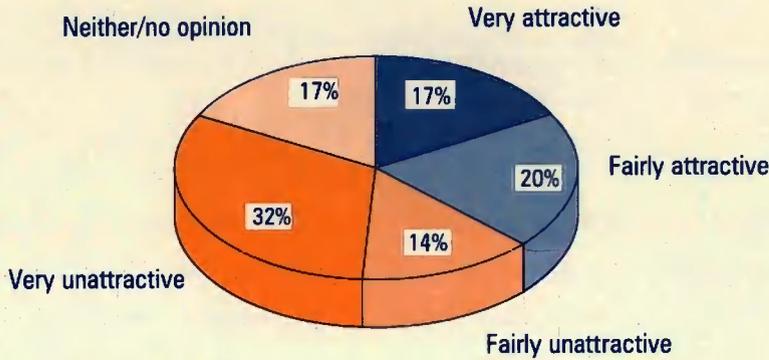
In the future car buyers may be able to select their new car after experiencing it through a virtual reality facility in a showroom or even via multi-media links to their own homes. Respondents were presented with the following concept and asked how attractive they found it.

The Virtual Reality Concept: With computers now it would be possible to go into a car showroom and look at a range of cars in something called "virtual reality". This technology allows you to either look round a car by moving a joy stick which would move a 3-D image on a screen, or you could wear a 'virtual reality' helmet where the images respond to your eye and body movements so you could experience moving round and into cars and even driving them without actually being there.

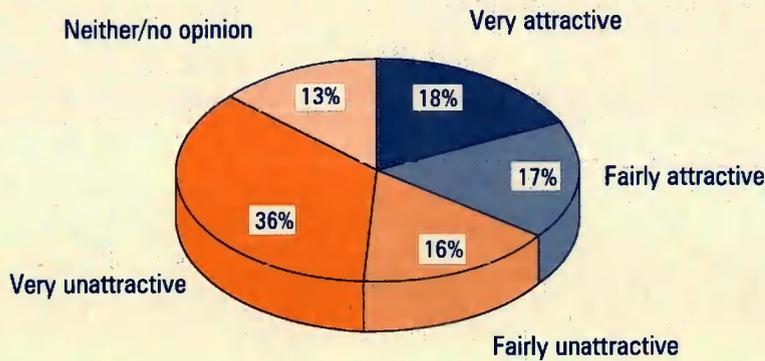
- One in three buyers of new cars would find a virtual reality facility in a car showroom attractive as a way of finding out whether or not they liked a new model.
- The proportions are similar if the concept is extended to using the facility via the home TV screen with a special device fitted.
- Male buyers are no more or less attracted to the idea than female buyers, although company car drivers who have been responsible for buying a new car seem to be more attracted to the idea than private car buyers.

If a 'Virtual Reality' facility existed at a new car showroom to allow you to try out a new car, how attractive or unattractive would you find this?

One in three new car buyers would find virtual reality attractive as a way of finding out about a new model



And if you could get access to this kind of facility via your television at home with a special device fitted, would you find this . . . ?



Base: All who have bought a new car in the last two years (175)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

SERVICING

Franchise dealers dominate the market for the servicing of new cars, often underpinned by requirements of new car warranties. The servicing of used cars is largely split between non-franchise garages and workshops and DIY. The trends suggest a slight shift towards franchise dealers and away from DIY and non-franchise outlets, perhaps reflecting the increasingly sophisticated servicing requirements of modern cars.

Drivers continue to express very high levels of satisfaction with servicing done by both main dealers and non-franchise outlets reflecting the fact that dissatisfied motorists are highly likely to move their custom elsewhere. Trends are particularly encouraging for franchise dealers which have seen their ratings rising steadily for the past four years. Indeed, they are now more highly rated than the non-franchise outlets by their respective customers for the first time in the seven years of Lex Report trends.

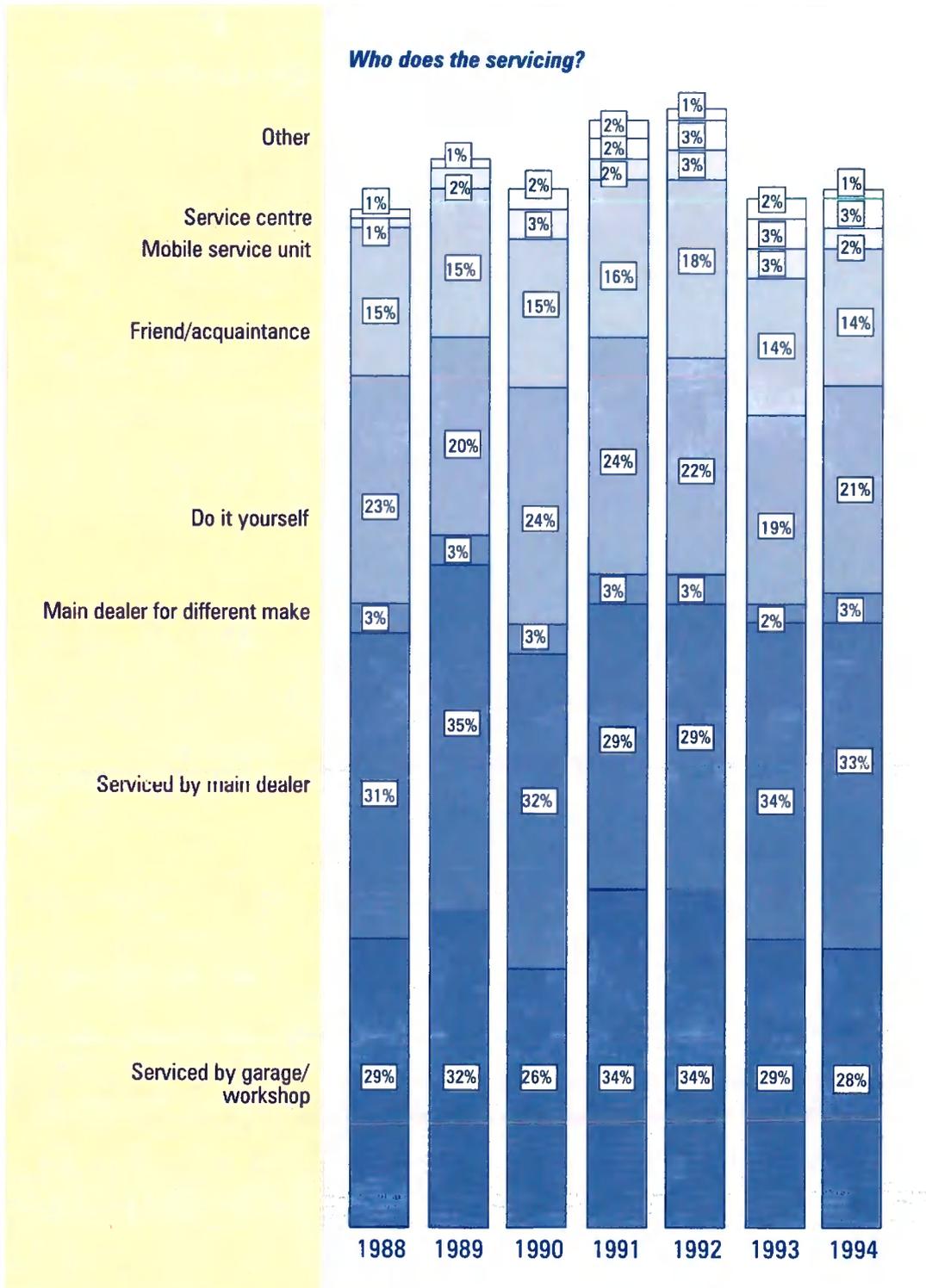
This section deals with the process of servicing a car, where they were serviced, how frequently and the reasons why. Drivers were also asked about keeping service records and their satisfaction with servicing.

Like the car buying chapter, this section continues the trends of earlier editions of the Lex Report on Motoring. More detailed research on the servicing process has been carried out in previous years and can be referenced through the seven year index on page 141.

Where cars are serviced

There appears to have been a slight trend towards cheaper ways of having the car serviced, reflecting the reduction in consumers' spending power in 1994.

- Nearly all male drivers and over half of female drivers have primary responsibility for getting their cars serviced.
- Around one in three of these have their cars serviced by a *main dealer* for their make of car although this is far higher for new cars than for used cars.
- Three-fifths of those who use a main dealer for servicing go back to the dealer who sold them the car. (An additional 3% go to a main dealer for another make).



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 (1,193)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI?

- Sixty per cent of main dealer service work is on cars bought new often because of warranty conditions. People who have their car serviced by a main dealer tend to care what car they drive – it's not just for getting from A to B – their concern is not to get the cheapest driving possible, and they are highly likely to be company car drivers. Those driving large, luxury and sports cars particularly favour main dealers for servicing.
- Three in ten get their car serviced by a *garage or workshop* which does not sell new cars. This choice is particularly prevalent among women, those driving small runabouts and those who don't particularly care what car they drive.
- One in five either *physically services the car themselves* or has it done by *somebody else in their household*; this is particularly high for men, young drivers and those with used cars. Used cars make up 86% of DIY servicing. Estate car drivers are particularly prone to DIY. This represents a slight increase on last year as consumers have had to reduce their expenditure.

Service location by new and used

Where serviced	Car bought new	Car bought used
	%	%
Franchise dealers	70	21
Non-franchise outlets	13	39
DIY/Friend	17	44
Other/never	1	5

- There has been a slight switch to DIY service in 1994.
- One in seven have their car serviced by a *friend or acquaintance* and this tends to be higher for women, drivers aged 17-34 and those with used cars. Altogether some 5.5 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%)* and *mobile servicing units (2%)* have relatively small and stable shares of the market.

The choice of location

Drivers choose main dealers for their expertise, local workshops for their personal service and DIY or a friend for the cost.

- Drivers use a main dealer because they know more about the car or they are tied in by warranty or lease agreement:
 - "The main dealer's safer"*
 - "The manufacturers know more about it"*
 - "I have extended warranty"*
 - "Lease agreement"*
- Personal experience, good service and often cost are reasons cited for using a non-franchise garage or workshop:
 - "I know the garage"*
 - "Personal service"*
 - "I know they'll do a good job"*
 - "It's cheaper than a franchise dealer"*
 - "The garage pick up and deliver"*
- Those who have their car serviced by friends/family or do it themselves do so because of quality, cost or they like playing with cars:
 - "I like doing it"*
 - "I'll know it's done right"*
 - "Garages are expensive"*
 - "Garages don't do the job they're supposed to do"*

Frequency of servicing

The average car gets serviced 1.5 times a year, or every 6,700 miles.

- As one would expect, frequency of servicing relates to the number of miles driven. Based on average miles travelled per year, low mileage cars get serviced on average every 2,900 miles (because the car is probably serviced on a time interval), medium mileage cars about every 7,700 miles and high mileage cars 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 (8,700 compared with 6,500).
- In addition, drivers on average need 0.7 visits per year for repairs to their cars. As expected this rises with age of car; 0.4 visits for younger cars, 0.9 for older ones.

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

	Base	No. of services	Miles between services	Months between services	No. of repairs
All	(810)	1.5	6700	8	0.7
New	(412)	1.6	7400	7	0.5
Used	(389)	1.4	6600	9	0.8
Age of Car					
0-3 years	(367)	1.6	8500	7	0.4
3-6 years	(216)	1.6	6400	7	0.7
Over 6 years	(212)	1.3	6200	9	0.9
Miles driven/year					
0-6000	(173)	1.2	2900	10	0.6
6001-20,000	(415)	1.4	7700	9	0.7
20,000+	(200)	2.5	11,200	5	0.7

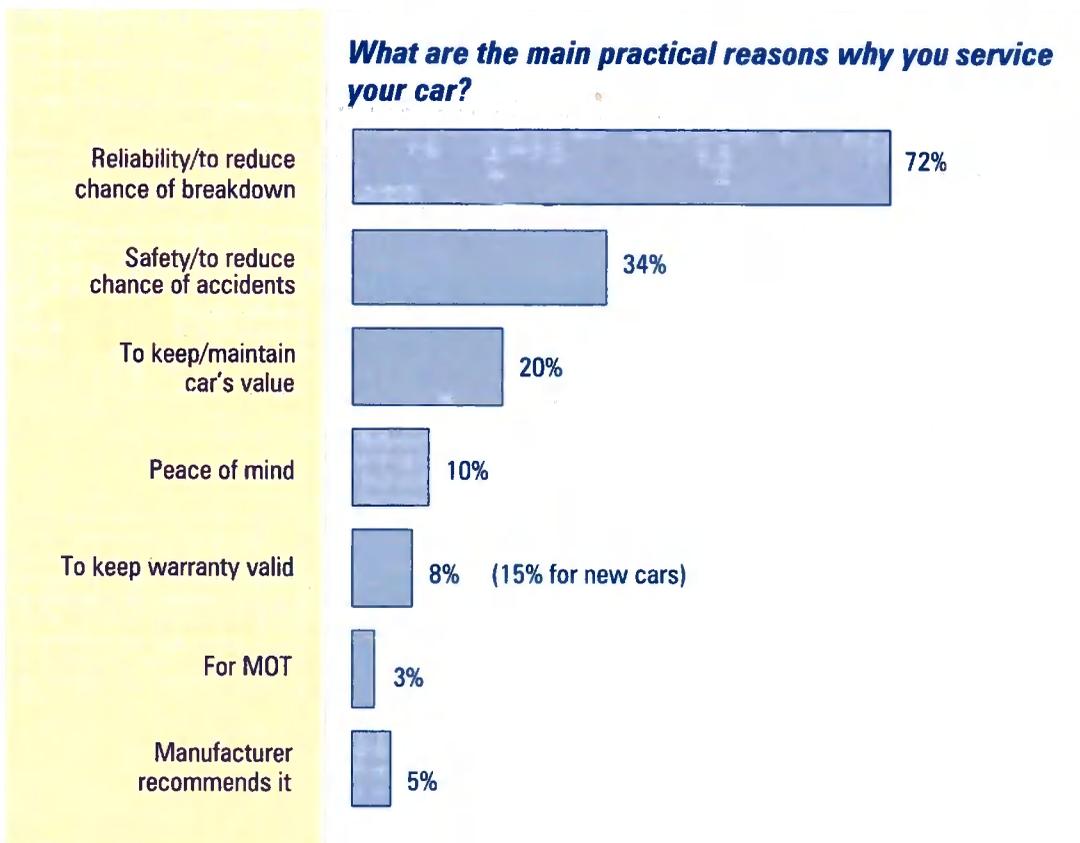
Base: All serviced by garage/dealer (810)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Reasons for servicing

The main reason for getting the car serviced is to ensure its reliability. Most drivers keep records of their servicing.

- Seven out of ten of those responsible for getting their car serviced cite reasons relating to reliability/reducing the chance of breakdown.
- One-third refer to reasons of safety, while just one in five refer to maintaining the car's value, although this reason is more common for drivers of cars bought new.
- Two-thirds of drivers claim to keep records of all invoices as a service record for their cars (as opposed to just having their service book stamped).
- Drivers of new cars place somewhat greater emphasis on maintaining the car's value and maintaining the validity of the warranty.

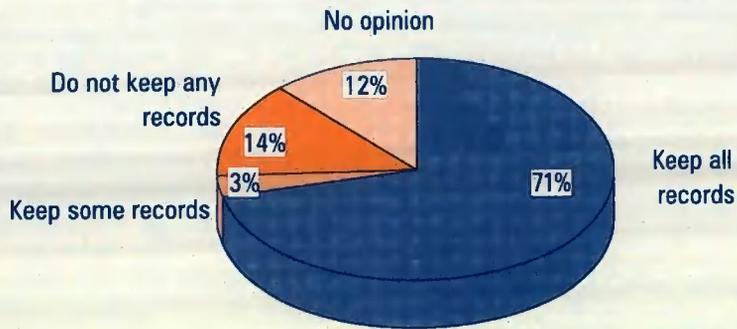


Base: All responsible for servicing car at dealer/garage/service centre/unit (856)

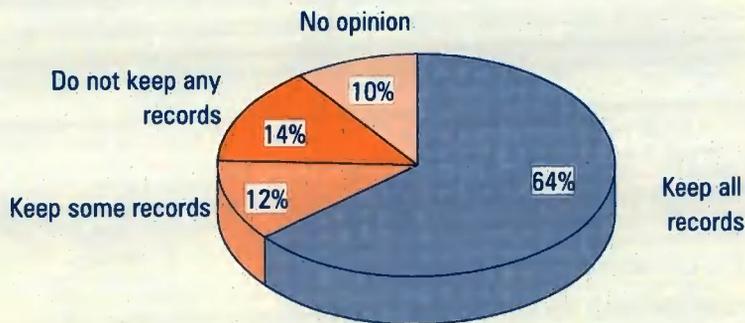
Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

To what extent do you (or your company) keep copies of invoices as a service record for your car— as opposed to your having the service book stamped?

All with new cars (418)



All with second hand cars (428)



Base: All responsible for servicing car at dealer/garage/service centre/unit (856)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Satisfaction with servicing

Satisfaction with servicing by main dealers is now at the highest level yet recorded in the Lex Report surveys. For the first time net satisfaction is higher for servicing done by main dealers than garages/workshops, although both exceed net scores of +80%.

- Nearly nine out of ten users of both main dealers and garages/workshops express satisfaction with the way their car is serviced.
- Although satisfaction ratings are slightly lower for garages/workshops, more of their customers would recommend their services to family or friends (87%), than customers of main dealers (81%).
- High standard of service and attention to detail are the main reasons for satisfaction:

"They're helpful and courteous"

"They tell me exactly what they're doing"

"They wash the car and fill up the windscreen washers"

"Their prices are pre-set"

"They steam clean the engine without charge"

"If there are any faults they take it back and fix it – no charge"

- Inability to perform even a basic service on the mechanical aspect of the car and insensitivity to the car and customer are the main causes of dissatisfaction:

"Still minor things wrong when I get it back"

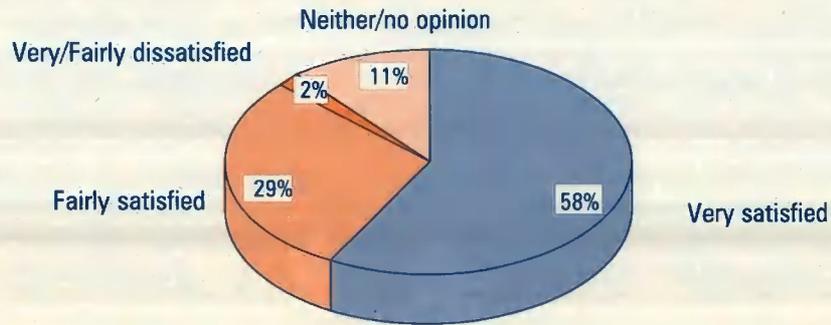
"They skimp on the work because it's a company car"

"They didn't find out what was wrong"

"I was charged for items I shouldn't have been"

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

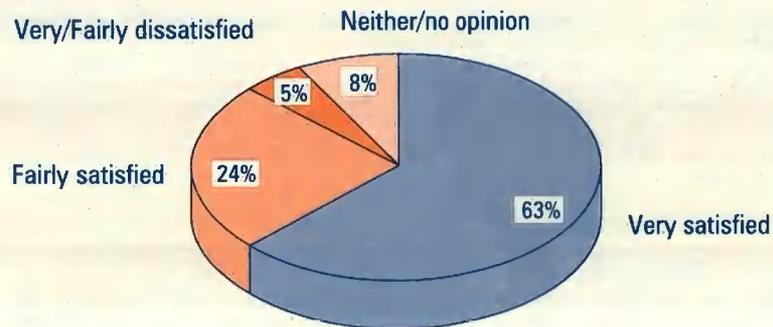
Main dealer



Base: Car serviced by main dealer (489)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Garage/Workshop



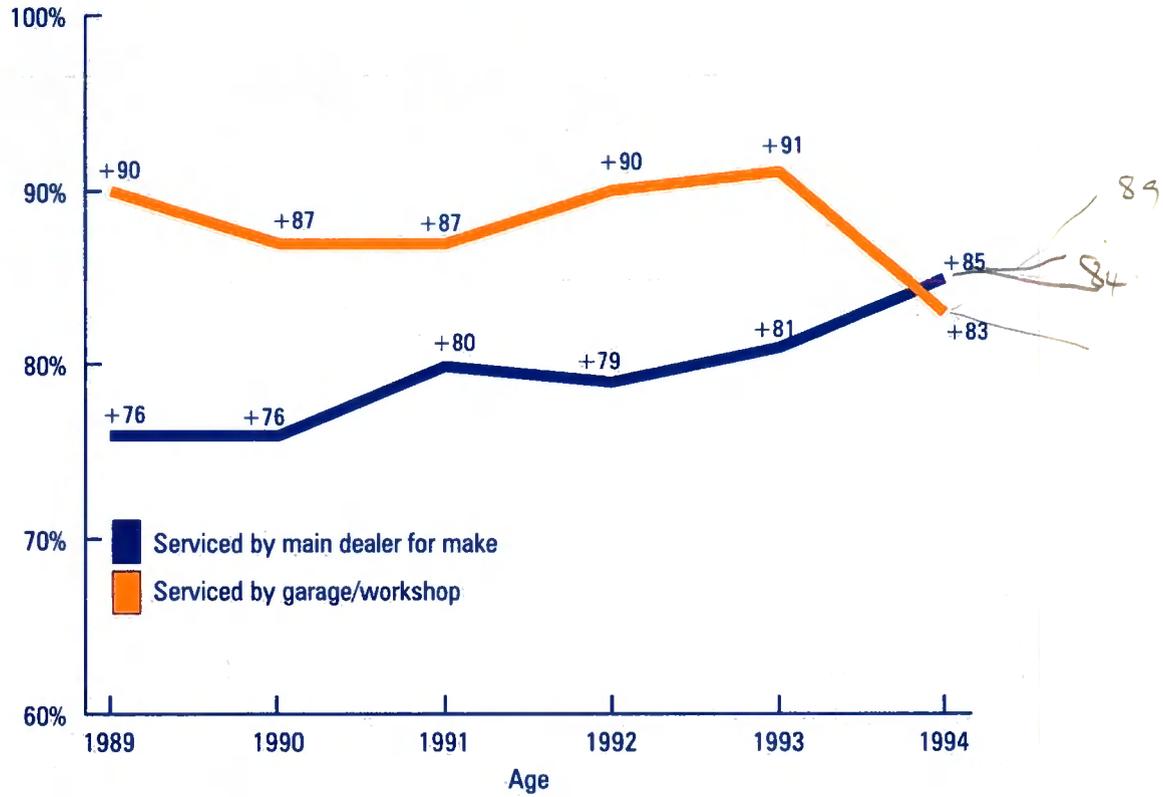
Base: Car serviced by garage/workshop (290)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Satisfaction with servicing

Net satisfaction

(Per cent 'satisfied' minus per cent 'dissatisfied')



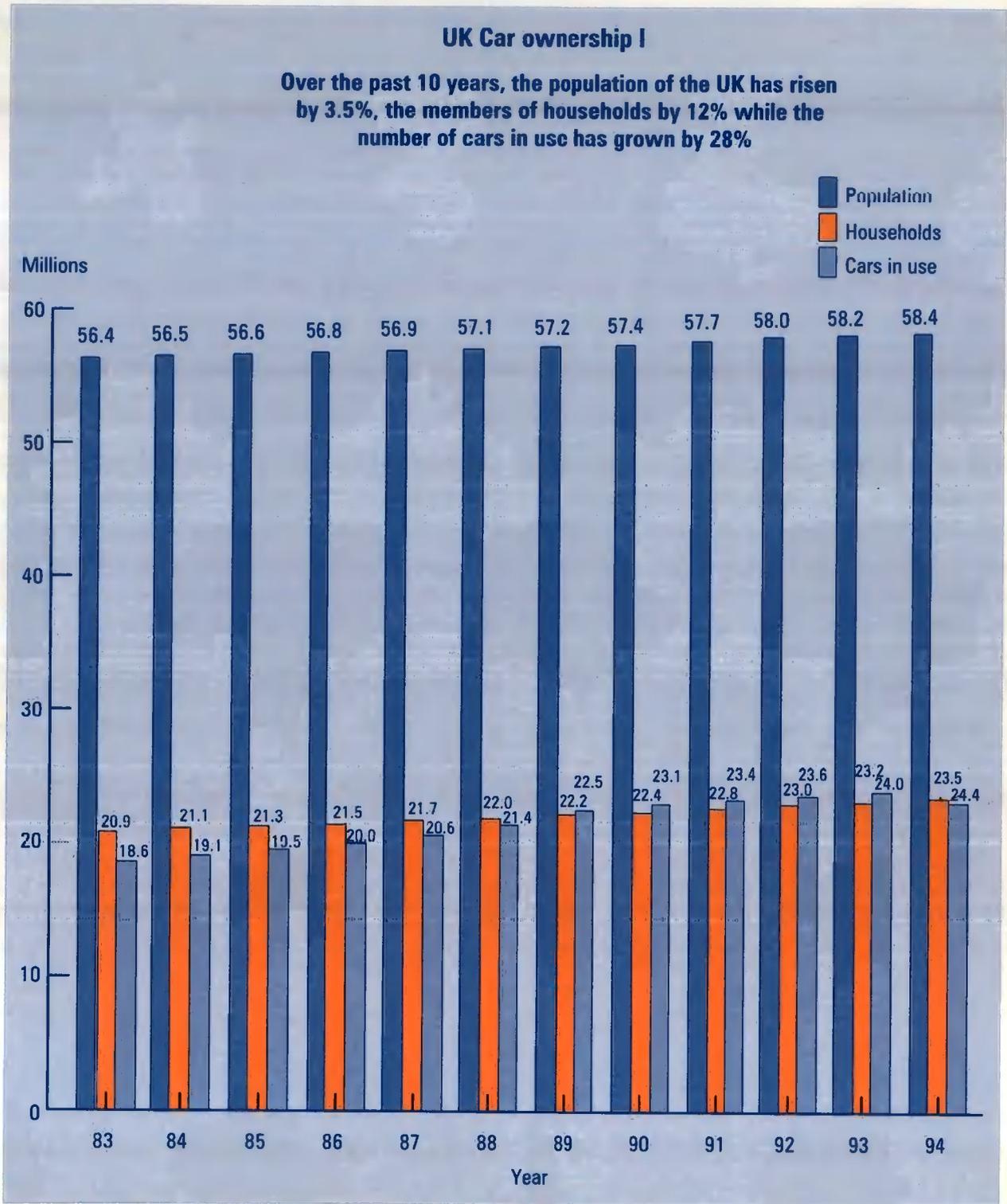
Base: All serviced by main dealer/garage workshop

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI





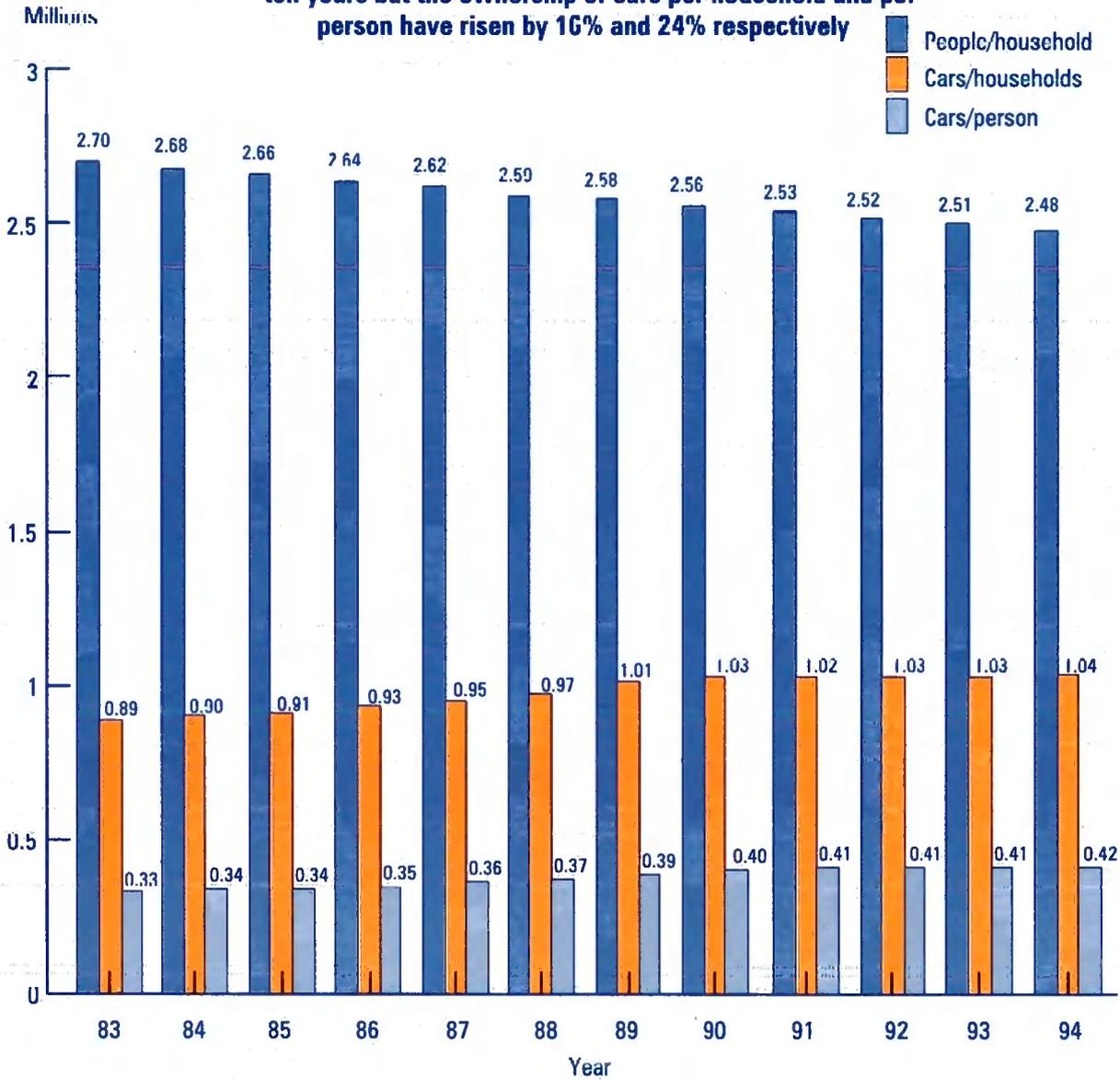
***Motoring Statistics
Statistical Profiles
Additional Data***

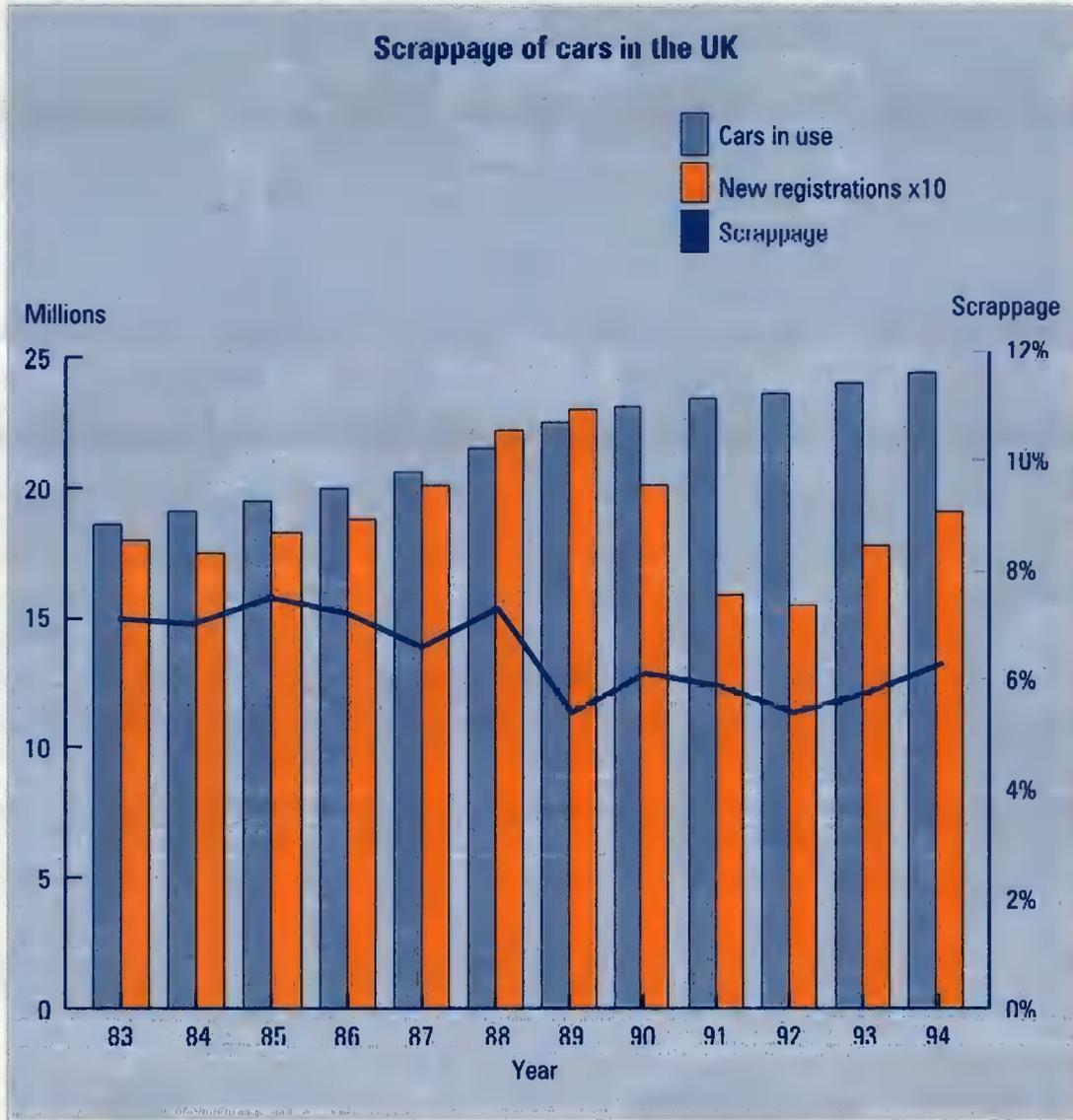


Source: SMMT for cars in use including lapsed vehicles, Department of Environment for households, Government Actuary for population

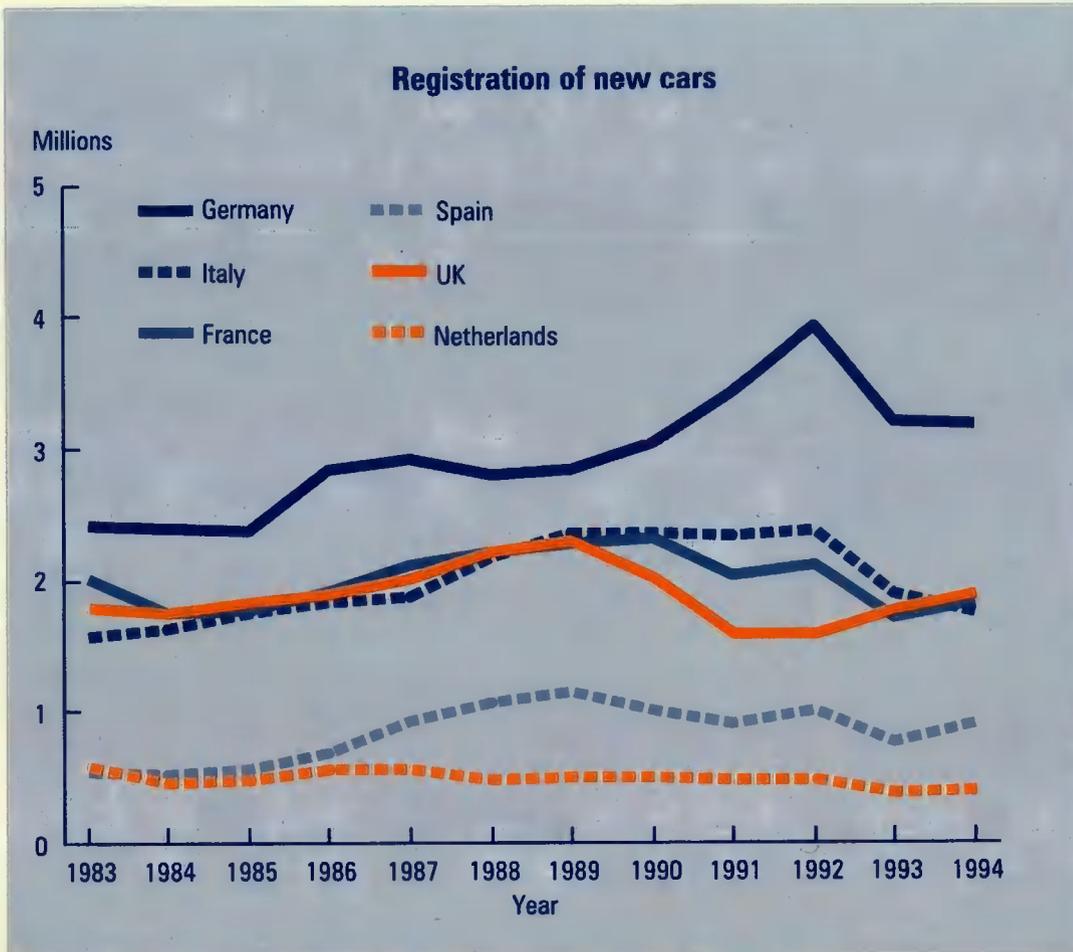
UK Car ownership II

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



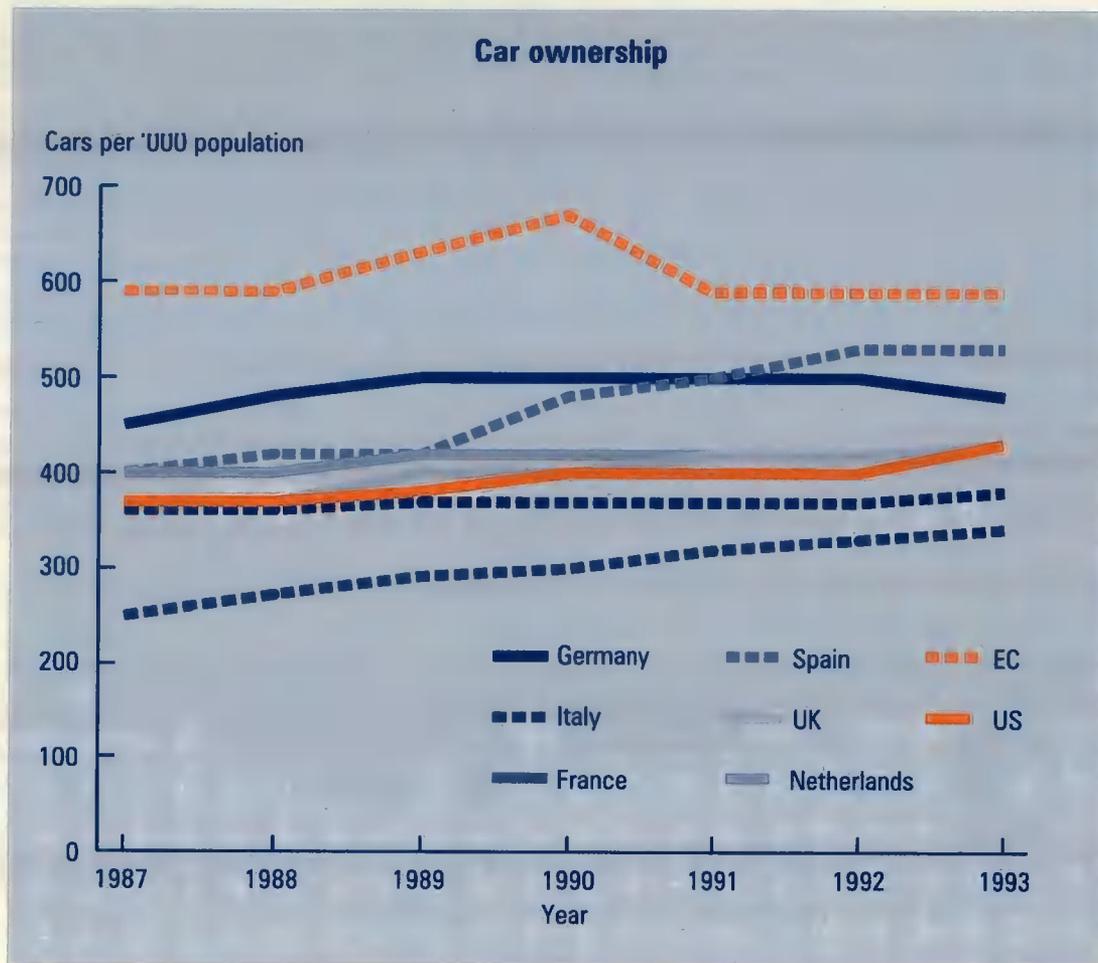


Source: SMMT



Base: All drivers

Source: SMMT/from local statistics



Base: All drivers

Source: SMMT

Registration of New Cars in the UK by Manufacturer

Market Shares %	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
Audi Volkswagen (VAG)	5.52	5.67	5.80	5.37	5.45	5.55	5.76	5.56	5.22	4.72	5.10
BMW	1.47	1.83	1.91	1.86	1.93	2.13	2.14	2.43	2.55	2.30	2.38
Citroen	1.40	1.50	1.83	2.29	3.02	2.89	3.03	3.36	4.04	4.54	4.42
Fiat	2.72	2.97	3.28	3.41	3.39	3.05	2.74	2.18	1.95	2.41	3.07
Ford	27.83	26.50	27.38	28.81	26.35	26.45	25.25	24.24	22.17	21.46	21.91
GM/Vauxhall	16.17	16.56	15.11	13.45	13.70	15.21	16.08	15.62	16.70	17.09	16.25
Honda	1.08	1.04	1.09	1.23	1.21	1.17	1.58	1.77	1.68	1.74	2.00
Hyundai	0.29	0.28	0.40	0.45	0.51	0.37	0.35	0.50	0.59	0.52	0.64
Jaguar	0.43	0.44	0.40	0.55	0.65	0.62	0.53	0.36	0.35	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	1.53
Nissan	6.08	5.76	5.84	5.67	6.08	6.02	5.32	4.03	4.66	5.02	4.81
Peugeot/Talbot	4.00	4.02	4.60	5.03	5.72	6.04	6.16	7.26	7.78	8.02	7.67
Renault	3.42	3.85	3.68	3.91	3.86	3.83	3.36	3.99	4.59	5.24	5.90
Rover	17.84	17.90	15.80	14.99	15.01	13.57	14.01	14.40	13.51	13.38	12.83
Saab	0.50	0.46	0.55	0.52	0.48	0.53	0.59	0.58	0.62	0.51	0.49
Toyota	1.87	1.89	1.90	1.90	1.80	1.84	2.12	2.59	2.65	2.93	2.72
Volvo	3.38	3.25	3.66	3.52	3.63	3.55	3.29	2.94	2.71	2.46	2.18
Others	5.46	5.37	6.11	6.41	6.64	6.32	6.72	7.40	7.41	6.12	5.75
Total Market (Million)	1.75	1.83	1.88	2.01	2.22	2.30	2.01	1.59	1.59	1.78	1.91

Source: Society of Motor Manufacturers and Traders



Profile of Britain's Car Drivers

	General Public (1992) %	Drivers (1990) %	Drivers (1991) %	Drivers (1992) %	Drivers (1993) %	Drivers (1994) %
Sex						
Male	47	59	59	57	58	58
Female	53	41	41	43	42	41
Age						
17-24	17	11	11	9	10	9
25-34	19	26	24	28	28	26
35-54	30	40	39	36	39	40
55-64	15	11	13	14	12	12
65+	19	12	13	13	11	12
Class						
AB	18 }41	26 }52	25 }53	23 }51	28 }56	24 }54
C1	23	27	28	28	28	32
C2	28	31	29	29	24	25
DE	31 }59	17 }48	18 }47	20 }49	20 }44	19 }44

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Driver Profile by Region

(Don't knows excluded)

	All drivers (1519) %	London (183) %	South East excl London/ East Anglia (272) %	Midlands (226) %	Wales/ South West (222) %	North England (465) %	Scotland (133) %
Sex							
Male	58	57	57	58	60	59	61
Female	42	43	43	42	40	41	39
Age							
17-24	9	8	10	13	5	10	8
25-34	26	27	28	22	30	26	25
35-54	40	44	38	42	42	38	38
55-64	12	10	9	14	11	16	9
65+	12	10	14	9	11	12	20
Mainly Drive							
Private car	90	89	87	91	92	90	91
Company car (own)	9	9	11	9	6	8	8
Someone else's company car	2	2	2	1	2	2	1
No. of Cars Owned							
One	58	62	46	55	71	58	57
Two+	42	38	54	45	29	42	43
Car Driven Most Often Bought . . .							
New	30	32	26	31	25	31	35
Used	70	68	74	69	75	69	65
Miles Driven per Year							
0-6000	31	41	24	28	34	31	32
6001-20,000	60	49	64	62	60	60	60
20,001+	9	10	11	10	6	9	8

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Profiles of Driver Types I

(Don't knows excluded)

	All (1519) %	Male (955) %	Female (551) %	17-24 (119) %	65+ (154) %
Car Driven Most					
Bought new	30	34	25	14	44
Bought used	70	66	75	86	56
Engine Size					
Up to 1400cc	44	39	51	68	55
1401-2000cc	47	50	42	31	35
Over 2000cc	9	11	7	1	10
Age of Car					
Up to 3 years	26	27	24	17	19
Over 3 to 6 years	28	28	28	20	28
Over 6 years	46	45	48	63	54
Bought					
Privately	91	88	94	96	98
Provided by own employer	6	9	2	1	1
Bought as business expense (Total Company)	1 9	2 12	* 6	0 3	1 2
Other employer/business expense	2	1	3	1	1
Expected Length of Ownership					
	Years				
Average	4.2	4.0	4.3	3.1	6.6
Miles Car Driven					
	Miles				
Average	10,100	11,200	8,500	10,300	6,100
Cost of Car					
Average	5,700	6,000	5,200	3,100	6,000

Based on car driven most often

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Profiles of Driver Types II

(Don't knows excluded)

Base:	All (1519) %	Normally drive: Own		Car driven most often	
		Private Car (1107) %	Company Car (383) %	Bought New (593) %	Bought Used (910) %
Car Driven Most					
Bought new	30	24	80	100	0
Bought used	70	76	20	0	100
Engine Size					
Up to 1400cc	44	47	11	43	44
1401-2000cc	47	45	70	46	47
Over 2000cc	9	8	18	11	9
Age of Car					
Up to 3 years	26	21	79	60	11
Over 3 to 6 years	28	29	14	24	30
Over 6 years	46	50	6	16	59
Bought					
Privately	91	100	0	75	97
Provided by own employer	6	0	82	18	1
Bought as business expense	1	0	18	2	1
(Total Company)	9	0	100	25	3
Other employer/business expense	2	0	0	4	1
Expected Length of Ownership	Years				
Average	4.2	4.3	2.7	4.2	4.2
Miles Car Driven	Miles				
Average	10,100	9,100	21,300	12,200	9,200
Cost of Car					
Average	5,700	5,000	13,200	10,200	3,800

See page 126 for information on cars

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Profiles of Britain's Cars

(Don't knows excluded)

Base:	Cars (2353) %	Bought			Private (1808) %	Company Cars		
		new (849) %	used (1494) %	Private (1808) %		All Co. Cars (519) %	Provided by an employer (399) %	Business expense (120) %
Car Driven Most								
Bought new	29	100	0	24	76	84	52	
Bought used	71	0	100	76	24	16	48	
Engine Size								
Up to 1400cc	45	42	47	49	14	15	17	
1401-2000cc	44	44	44	42	60	62	50	
Over 2000cc	10	13	9	9	26	23	33	
Type of Ownership								
Bought privately	89	72	96	100	0	0	0	
Provided by an employer	8	23	2	0	73	100	0	
Business expense	3	5	2	0	27	0	100	
Age of Car								
0-3 years	25	61	11	20	81	41	36	
3-6 years	28	24	29	29	13	30	29	
Over 6 years	47	15	60	51	6	29	26	
Mean Age (years)								
1994	5.9	3.1	7.0	6.3	2.6	2.0	4.4	
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	
Seven Year Trends								
1994	100	29	71	89	11	8	3	
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 cars in the household (up to a maximum of 3 per household)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

The Importance of the Car

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

	Strongly agree %	Tend to agree %	Neither agree nor disagree %	Tend to disagree %	Strongly disagree %	No opinion/ Don't know %	Net agree ±%
a) I would use my car less if public transport were better (Base: All motorists – 1,519)	12	26	5	32	25	1	– 18
b) I would find it very difficult to adjust my lifestyle to being without a car (Base: All motorists – 1,519)	54	27	3	11	4	1	+66
c) I would find it very difficult to adjust my lifestyle if our household did not have a car (Base: All 13-16 year olds – 141)	45	33	6	9	2	5	+67
d) If the railways were run by private companies, I would be more likely to use them instead of my car (Base: All motorists – 1,519)	1	5	16	33	41	3	– 67
e) Most of the time I enjoy driving (Base: All motorists – 1,519)	41	39	6	9	4	1	+67
f) I don't care what car I own as long as it gets me from A to B (Base: All motorists – 1,519)	26	33	6	23	11	*	+24
g) I consider the type of car I usually drive reflects my personality (Base: All motorists – 1,519)	4	20	17	35	23	1	– 33
h) My main concern is to get my motoring at the cheapest cost possible (Base: All motorists – 1,519)	32	36	10	18	4	1	+46
i) I am interested in cars (Base: All 13-16 year olds – 141)	14	35	16	23	8	5	+19
j) I am frightened to drive on my own at night (Base: All motorists – 1,519)	3	8	4	26	59	*	– 74
k) I like to drive fast (Base: All motorists – 1,519)	7	21	15	33	24	*	– 29
l) When I travel by car for long distances, I tend to feel sick (Base: All 13-16 year olds – 141)	22	20	4	23	28	4	– 9

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Policies on Pollution and Congestion

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

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

	1990 (1,564)		1994 (1,519)	
	Help pollution %	Help congestion %	Help pollution %	Help congestion %
Investment				
Invest a lot more in buses and trains	40	45	47	40
Invest in better roads	17	29	18	22
Wider motorways/main trunk roads	7	33	10	28
Restricted use of Road Space				
Ban cars from city centre	40	35	50	39
Introduce more bus lanes	21	31	27	28
Reserve one lane on motorways as a toll lane for heavy commercial vehicles	18	25	20	23
Lanes reserved for car with two+ occupants	8	12	10	11
Taxation and Tolls				
Charge higher tax on large cars	25	8	22	8
Increased subsidies for public transport, from taxes	23	26	30	24
Build new toll roads	9	27	9	20
Much higher taxes on petrol	15	10	19	9
Car drivers charged £3 a day to drive in city	10	15	14	20
Tolls on certain main roads and motorways	7	16	10	15
Restrictions on Driving Behaviour				
Maximum speed limit of 60mph on main roads	14	3	15	3
Maximum speed limit of 80mph on main roads	3	4	7	5

Base: All drivers

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?

	1993	1994
	%	%
Speed	27	21
Sporty looks/general look of car	27	37
Cheap to run	26	23
Comfort	23	21
Safety features	19	19
Good stereo	18	23
Cheap to buy	16	14
Good make of car	14	16
Plenty of space	13	16
Certain colour	13	29
Environmentally friendly	12	10
Other	25	39
No opinion	13	15

Base: All 13-16 year olds

(1993: 170)

(1994: 141)

Effect of Replacement of Current Cars on Shares of Total Car Market by Types

Per cent of Total Cars

	Gain	Lose	Keep	Don't Know	Net Gain
Small runabout	2.6	5.8	10.6	5.5	-3.2
Small saloon	4.8	4.6	5.8	3.6	+0.2
Small hatchback	4.7	6.3	10.9	4.6	-1.6
Small estate	2.3	1.1	1.4	0.7	+1.2
Large saloon	3.4	3.8	7.6	2.8	-0.4
Large hatchback	3.5	4.4	5.6	2.7	-0.9
Large estate	2.6	1.1	2.4	0.9	+1.5
Luxury saloon	0.9	0.2	1.6	1.0	+0.7
Sports	1.3	0.6	1.2	0.9	+0.7
4 x 4 off road	1.2	0.1	0.7	0.4	+1.1
People carrier	0.9	0.2	0.6	0.1	+0.7

NB Other/none/don't know of current cars excluded

Base: All drivers (1,519)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Source of Finance

Q How was the car you drive most frequently bought?

	All					Bought New					Bought Used				
	'90	'91	'92	'93	'94	'90	'91	'92	'93	'94	'90	'91	'92	'93	'94
Cash/loans from family	44	45	47	45	47	47	42	42	39	44	46	46	51	49	49
Finance Co loan/(+cash)	15	16	19	16	16	20	16	24	19	16	11	15	17	14	16
Bank loan (+cash)	12	15	12	11	9	8	12	9	11	8	15	18	14	11	10
Hire purchase/(+cash)	11	11	7	10	9	15	15	10	11	8	7	8	5	10	10
Contract purchasing (eg Ford Options)	n/a	n/a	n/a	n/a	3	n/a	n/a	n/a	n/a	9	n/a	n/a	n/a	n/a	*
Contract hire/full service leasing	1	2	2	3	2	2	3	3	6	4	0	*	1	1	*
Building Society loan/(+cash)	1	3	3	2	2	2	0	1	1	0	1	5	3	2	3
Finance leasing	3	1	2	2	3	5	2	3	5	3	1	1	1	*	2
Other	3	3	4	4	4	3	4	7	5	7	2	3	3	3	3
Don't know/refused	10	4	4	7	5	2	6	1	3	3	17	4	5	10	7

Base: All responsible for buying a new car or second hand car at dealers.

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Source of Finance (Cont'd)

Q How was the car you drive most frequently bought?

	Car bought used		
	All (258) %	Franchise Dealer (139) %	Non Franchise Dealer (119) %
Cash/loans from family	47	47	53
Finance Co. loan/(+cash)	16	20	11
Bank loan/(+cash)	9	6	15
Hire purchase/(+cash)	9	10	9
Contract purchasing (eg Ford Options)	3	1	0
Building society loan/(+cash)	2	3	3
Contract hire/full service leasing	2	0	*
Finance leasing	3	3	2
Other	4	3	2
Don't know/refused	5	8	6

Base: All responsible for buying used car at dealer (258)

Source of Purchase – used cars by age of car

	All (474) %	Up to	3-6	Over 6
		3 years (111) %	years (137) %	years (214) %
Private deal	21	12	13	29
Used car dealer	25	22	29	24
Friend/relative	19	8	13	27
Franchise dealer for your make	20	36	32	8
Franchise dealer for another make	8	13	9	6
Car auction	2	2	*	3
Gift	1	0	0	1

Base: All responsible for buying a second hand car in last 2 years.

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

Car Features – Likes and Expectations

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	
	'93	'94	'93	'94	'93	'94
Security	%	%	%	%	%	%
Car alarm	31	33	47	51	38	48
Central locking	37	40	43	54	36	46
Windows etched with car number	48	51	38	46	25	32
High security door locks/deadlocks	14	15	35	30	40	43
Thief-proof radio/cassette/CD	28	34	33	39	37	40
Engine cut-out device to stop thieves	11	13	28	26	38	43
Mechanical immobiliser (not a steering lock)	9	11	18	22	31	34
Separate thief-proof boot	7	7	14	12	29	30
Hidden 'Tracker' to enable police to detect your car, if it was stolen	1	*	13	9	39	43
Safety						
Airbag	2	5	35	34	51	55
ABS (Anti-lock Braking System)	10	12	34	35	46	54
Side-impact protection bars	11	13	31	30	41	45
Heated front windscreen	22	26	25	28	36	43
In-board computer to detect fog, ice, etc	n/a	2	n/a	4	n/a	28
In-board computer to detect traffic jams, roadworks, etc	n/a	1	n/a	2	n/a	29
100 mph speed limiter	1	2	5	4	28	28
100 mph speed limiter	3	3	5	4	14	15
Comfort						
Fully adjustable front seats	69	75	43	56	26	33
Powered steering	26	30	40	47	40	50
Adjustable steering wheel	22	26	25	30	28	32
Electric sunroof	13	15	23	27	38	45
Air conditioning	17	14	18	18	36	43
Performance/Environment						
Catalytic converter	13	17	30	31	31	34
Four-wheel drive	4	3	8	6	28	30
In-board computer to calculate MPG and average speed	3	3	5	6	23	25
Accessories						
Car phone	3	3	6	5	31	33
In-board computer to tell you the best routes from A to B	*	*	3	2	26	28
Fax	*	0	1	1	11	12
None of these	1	7	8	4	4	3
Don't know	9	1	7	12	8	3

Base: All drivers

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI



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

	All drivers %	Bought new %	Bought used %	Private %	Company %
Certain to	7	8	7	7	13
Very likely	15	15	16	15	20
Fairly likely	22	20	22	22	20
Certain not to/unlikely	51	52	50	51	45
No opinion	5	5	5	5	2

	Men %	Women %	Drive over 20,000 miles per year %	Diesel* car drivers %
Certain to	7	7	11	49
Very likely	17	13	21	38
Fairly likely	22	22	23	7
Certain not to/unlikely	50	51	44	4
No opinion	4	7	1	2

Base: All drivers (1,519)

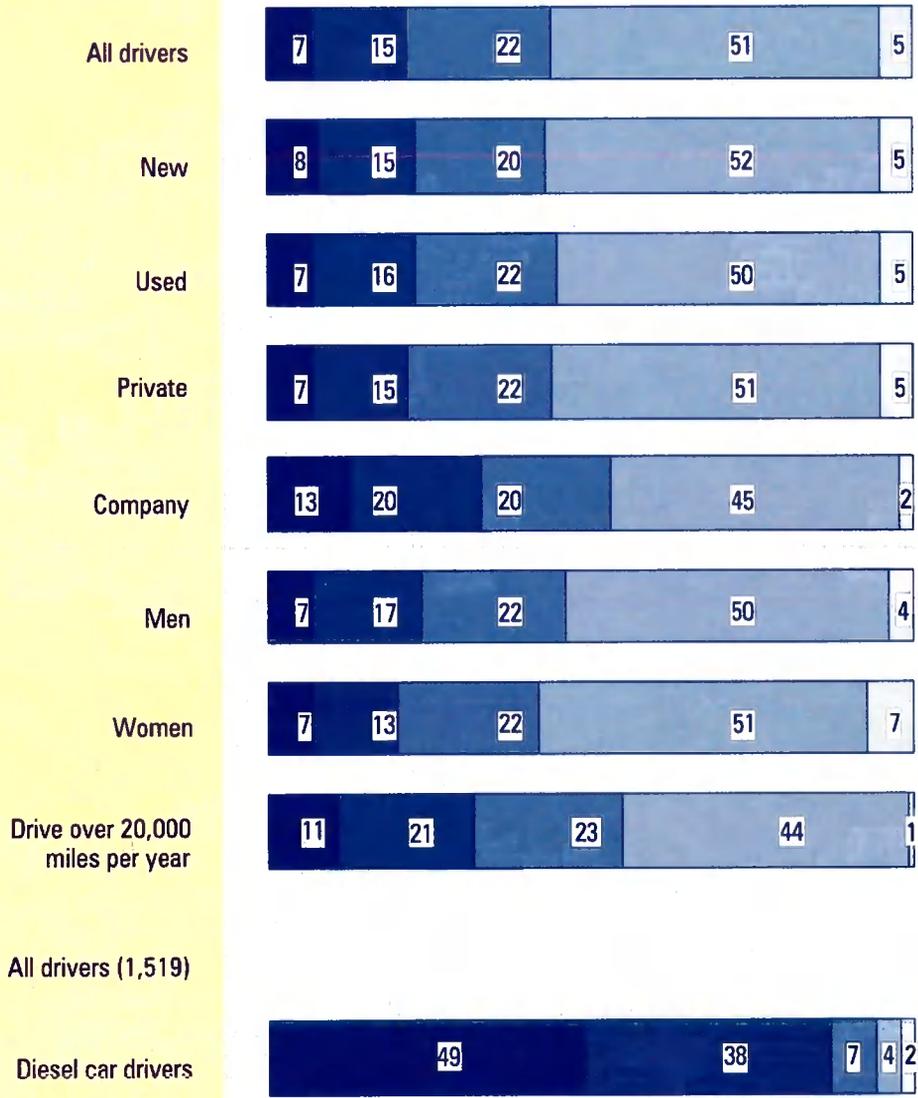
*Base: All whose car runs on diesel (139)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI



Purchase of Diesel cars

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



Base: All whose car runs on diesel (139)

Source: 1995 Lex Report on Motoring, "What Drives the Motorist?"/MORI

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 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:

	Sample size	Research Findings				
		10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total Drivers	1,519	±2	±2	±2	±3	±3
	1,250	±2	±2	±3	±3	±3
	1,000	±2	±3	±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, i.e. close to the findings from the research.

For similar reasons, when comparing findings between two areas of the country, or between two sub-groups (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%
1994 compared with 1993 base	1,519-1,720	±2	±3	±3	±3	±4
New vs used car drivers	595-910	±3	±4	±5	±5	±5
Company vs private car drivers	406-1,107	±3	±5	±5	±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

1989-1995 (numbers refer to page in Report)

	1989	1990	1991	1992	1993	1994	1995
BUYING A CAR							
Best time to view a car	59						
Buying by virtual reality							102
Cost of car					73	72	98
Changes in car ownership				44			
Commitment to manufacturer					89		62
Considerations in buying next car			106				
Extra car expectations				42			37
Features in current/next car					90	104	133
How car is chosen	46				86		
Influences on choosing model		90					
Next car purchase new/used			104		70	57	56
Numbers buying a car	42	81		81	69	63	92
Part exchange				101	74		
Profile of new and used car buyers					65		
Reasons for buying car now	44	82			72		
Reliability versus durability		92					
Time taken to buy a car					82		
Trust of information sources		89					
Type of car bought							97
Used car money back/exchange			102	90			
Used car retailing							87
Who helps choose car	46						
Who makes choice about car	48						
CAR OWNERSHIP							
Accuracy of mileometers		86					
Car bought new/used	42	81	90	80	68	63	94
Car replacement or additional	42			82			
Choice of car							51
Diesel cars					98	110	29
Drivers in household					40		
Effect of economic climate			40	46	50		79
Increase/decrease in car ownership						54	80
Length of car ownership			35	36	42	58	47
Lifestyle and car ownership							49
New versus used car purchase		84					
CONGESTION							
Delays due to congestion	70		52	54			
Effects of congestion				58			
Congestion, problem/easing		70	84	56			26
Radio traffic reports		72					
CHANNEL TUNNEL							
Channel Tunnel use	40	108	124	124	61	117	

Lex Report On Motoring

1989-1995 (numbers refer to page in Report)

	1989	1990	1991	1992	1993	1994	1995
DEALERS							
Attractions of an outlet	52						
Car finance	57	92	94	98	80	70	131
Dealers visited	57	86		96	84	74	
Deciding where to buy a car	52		96	86	93	77	
Discounts							100
Fixed vs negotiated prices/bargaining				92			101
Personal service when buying a car	55						85
Sales people						86	
Satisfaction with sales experience		88					
Service and parts with car sales				88	95		
Shopping for a car						78	
Single franchise outlets				84			
Source of purchase of car	50	83	92	84	76	66	59
Test drives	57	86		96	84		
Treatment of women		94					
DRIVERS AND THE MOTORING ENVIRONMENT							
Age passing driving test				51			
Britain's drivers							15
Car waiting to be sold					32		
Costs of owning car		36					
Difficult to adjust lifestyle	16	34		48	62	34	20
Don't care what car I drive	16			48	65		127
Driving to work					48		
Free parking					48		
Items in car					58		
Learner drivers						112	
Ownership of household garages				50			
Privatisation of railways					66		21
Road system satisfaction	34						
Role of car					65		
School run							65
Use of car	12						22
Women drivers						42	
Would use public transport more	16	34	68	72	66	34	
DRIVING							
Best-drivers-men or women	18						
Behaviour to other drivers							39
Causes of anger/stress			56				
Concerns and fears						26	
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