

1993

Lex Report on Motoring—

The Consumer View

LEX

SERVICE





1993 LEX REPORT ON MOTORING – The Consumer View

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Lex Report
On Motoring
'The Consumer View'**





1993 LEX REPORT ON MOTORING – The Consumer View

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FOREWORD BY THE SECRETARY OF STATE FOR TRANSPORT

I am delighted to have been asked to introduce this, the fifth Lex Report on Motoring. It continues to provide useful information on motorists' opinions on a wide range of issues.

The survey shows the importance that most drivers attach to having a car and the sense of freedom which they believe comes from having one's own transport. We must clearly take account of this in framing our transport policies.

But we all know too that car ownership carries serious responsibilities. I am heartened that the survey shows drivers expect to put more weight on both safety and environmental features when choosing their next car than they did in their last car purchase. There is wide variation between different models in both safety protection offered and fuel consumption; so the choices drivers make at the time of purchase can have a considerable influence on safety and environmental protection. Manufacturers and dealers can help by ensuring that these features are drawn to the attention of the purchaser.

I am also very encouraged that the vast majority of motorists view drink driving so seriously. We shall do all we can to convince the remaining minority that it is not acceptable even to be just over the limit. I am also pleased at the high percentage who support the use of cameras as an aid to catching drivers who ignore red traffic lights.

Lex Service PLC performs a valuable service in producing this survey and its predecessors. The surveys help to inform the debate about the role of motoring in our society. I warmly recommend this report, and look forward to future editions.

John MacGregor



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INTRODUCTION

This is the fifth edition of the Lex Report on Motoring, based again on the results of a survey specially conducted for us by MORI. We now have five years' of detailed information on the behaviour and attitudes of the British motorist, covering a wide range of issues of concern to policy makers, legislators and to all of us involved in the manufacture and retailing of passenger cars. We have researched over 130 different topics during the five years and now have what we believe is the most comprehensive database of information on motoring in the UK.

Continued reliance on the car

Despite a fall of over a third in new car sales in Britain over the past three years, it is clear that the demand for the personal transport provided by the passenger car is unabated. The number of households with a car continues to rise although the severity of the recession has reduced the trend to more cars per household. However there is still a strong expectation of increased car ownership, fuelled particularly by the growing desire for young people to own a car once they pass their driving test. Consistently four out of five drivers say that they would find it very difficult to adjust their lifestyle to being without a car and three out of four say that they would lose their sense of freedom if they did not have a car.

Concern for safety, security and the environment

Britain's motorists continue to act responsibly in their use of the car. They would like their next cars to have additional safety, security and environmental features and believe that offenders should be severely dealt with for traffic offences.

Demand for cars

Because the Lex Report on Motoring covers all types of motorists and car buyers, we are able to monitor the behaviour of drivers and buyers of both new and second hand cars whether they own the car themselves or it is financed by a company. We have used this depth of knowledge to prepare a separate report on company car drivers (publication date February 1993) in conjunction with our jointly owned car leasing company, Lex Vehicle Leasing. Together with the Henley Centre for Forecasting we are also using the information from our consumer behaviour research to create a model of the car market which we believe will help us to understand better the dynamics of the market.



Quality and service

The consumer continues to demand improved quality, both in the car itself and in the service provided by the retailer. Each year, we have used the research to explore how we can raise our quality standards within Lex and we have introduced new services in our rapidly expanding network of nearly 90 dealerships representing more than 20 manufacturers throughout the country.

We hope that by making the report widely available we will help the entire industry to understand our customers better and respond more effectively to their needs.

We in Lex Service are committed to giving our customers the highest quality of service. This report will help us to achieve this goal. I hope you find it interesting 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



LEX SERVICE AND THE RETAILING OF CARS IN THE UK

Over the past five years the Lex Report on Motoring has reported on the changing attitudes of drivers to all aspects of motoring.

During this time Lex has not only responded to those changing attitudes but has initiated many of the practices which influence them.

Lex has always believed firmly in developing a relationship with each and every customer based on trust. The Report's findings reinforce the importance of this approach across all departments of our dealerships.

Buying your car

When buying a car, the Lex Way of Selling ensures that our Sales Executives listen to what each customer wants and needs from a vehicle so that both the purchase and the motoring experience are enjoyed for many years.

The Lex Club is a practical statement of our policy to give our retail customers added value benefits. Membership, which is given to purchasers of new and used cars, can save time and money for the customer and also provides convenient additional services such as accident management and free road test and safety reports.

Maintaining your vehicle

Lex understands that customers need the reassurance of trouble-free motoring. Our service departments, of course, provide the usual benefits of collection and delivery of service vehicles, courtesy buses and cars, menu pricing and while you wait servicing. But we have gone further to develop a range of service products and benefits which offer our customers a total motor care package including advice on environmental and safety aspects of motoring.

Peace of mind purchasing

As the leading car retailer, Lex has developed a unique range of finance and insurance packages to provide our customers with the reassurance that purchasing a car need never become a burden. For example Lex Credit Protection Insurance and Lex Vehicle Replacement Insurance both give customers extra peace of mind should they face redundancy or have their car stolen.



Supporting business users

With its wide franchise and geographic coverage, Lex provides business users with “one-stop” shopping, through a national fleet organisation which offers significant benefits, whatever the size of fleet, either through purchase or contract hire.

Communicating with customers

Our dealerships work hard to maintain and improve the relationship with our customers. We keep in touch with regular contact on what is happening both in the dealerships and in the market, offering special promotions and frequent invitations to special events in the dealerships such as new model introductions, Ladies’ Nights or charity fund-raising events. We have also recently launched Lex Motor Club, another practical commitment to our service customers, providing them with valuable benefits.

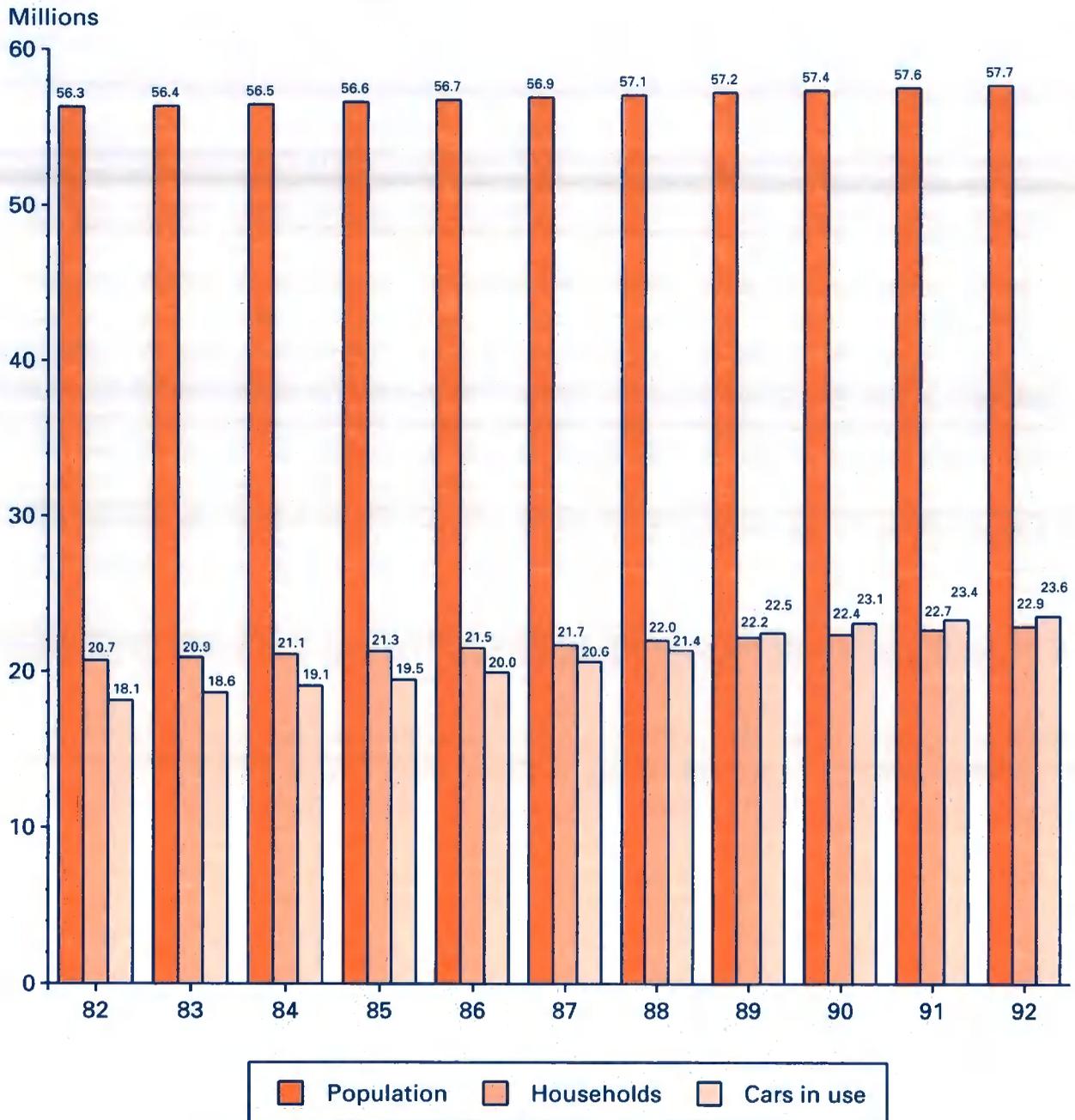
These initiatives are part of our commitment to ensure that Lex maintains its lead in meeting customer expectations and providing service which our customers will describe as excellent. The Lex Report on Motoring reinforces our strategy and helps to develop it further.



MOTORING STATISTICS

UK Car Ownership I

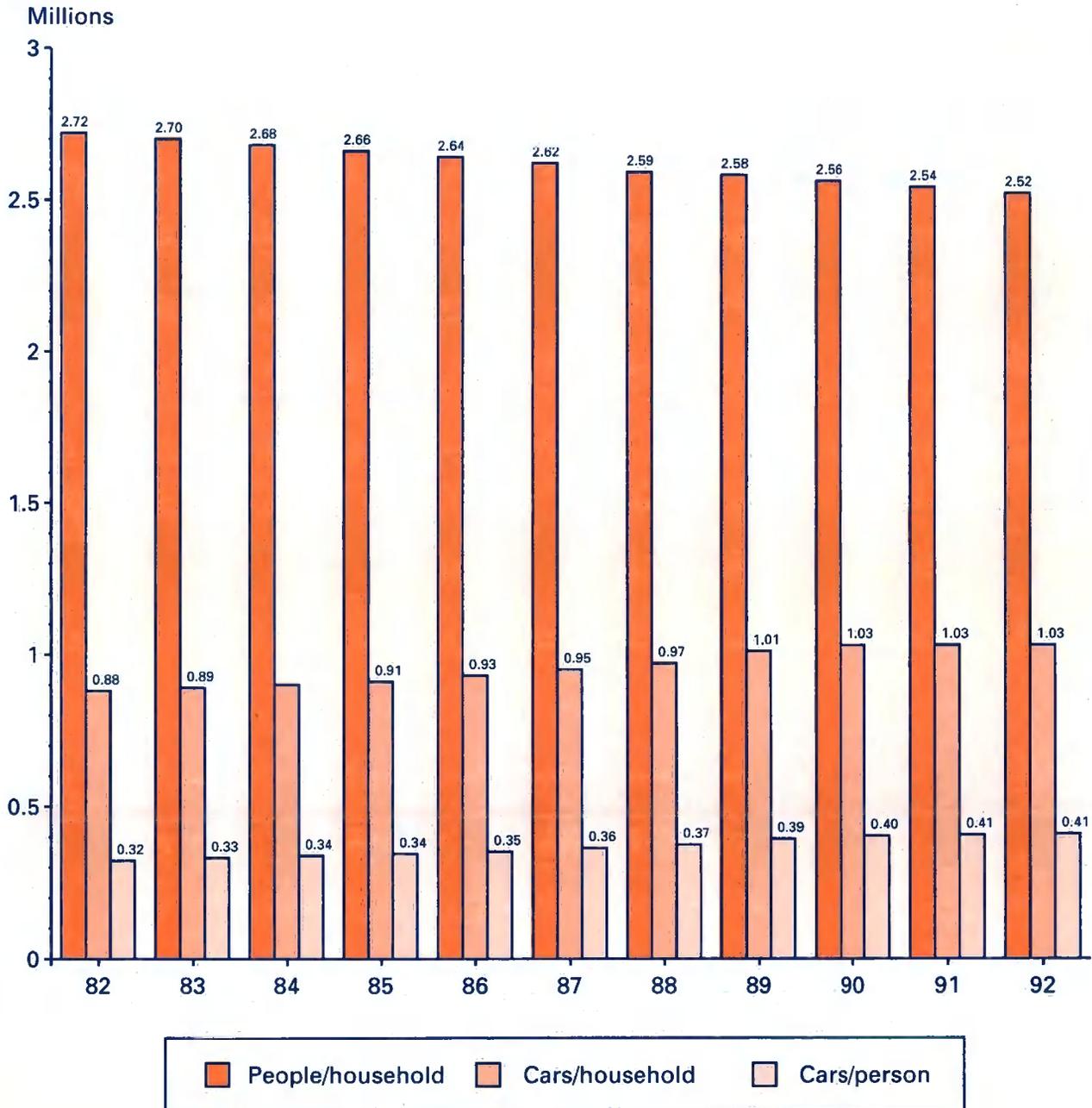
Over the past ten years, the population of the UK has risen by 2%, the number of households by 11%, while the number of cars in use has grown by 30%.



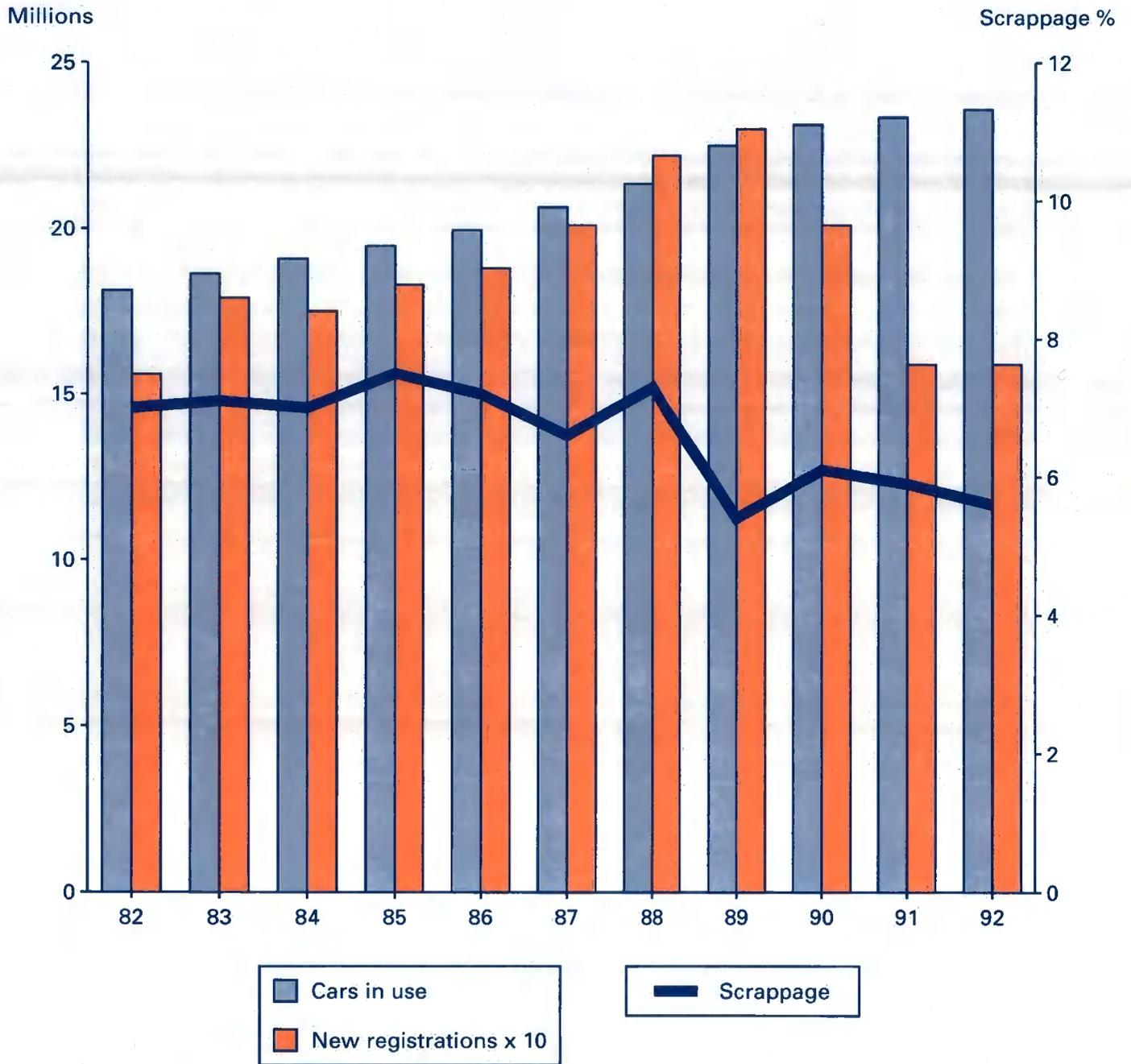
Source: SMMT for cars in use including lapsed vehicles, DOE for households, Govt Actuary for population

UK Car Ownership II

The average size of households has fallen by 7% over the past 10 years but the ownership of cars per household and per person have risen by 17% and 27% respectively.

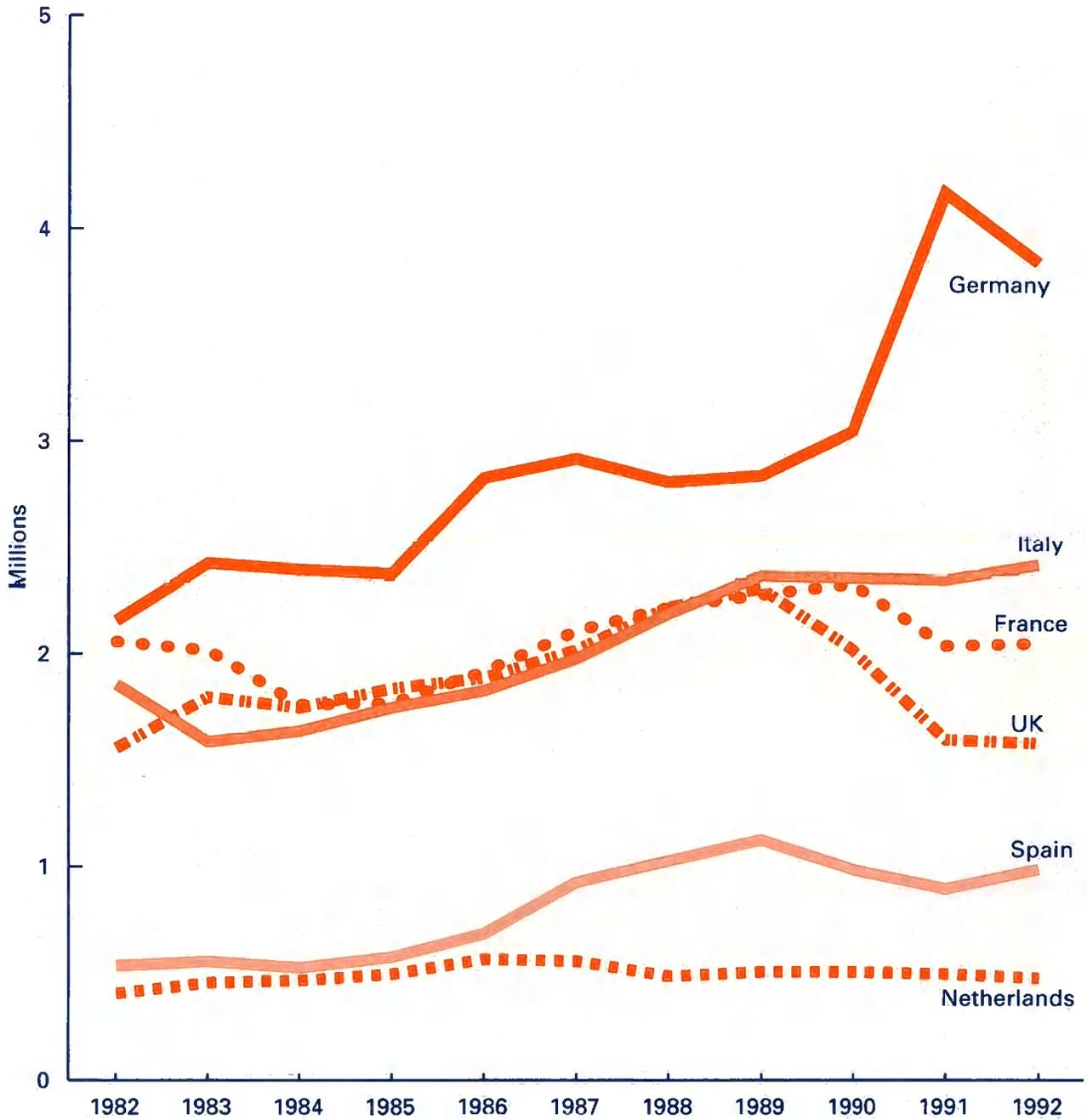


Scrappage of cars in the UK



Source: SMMT

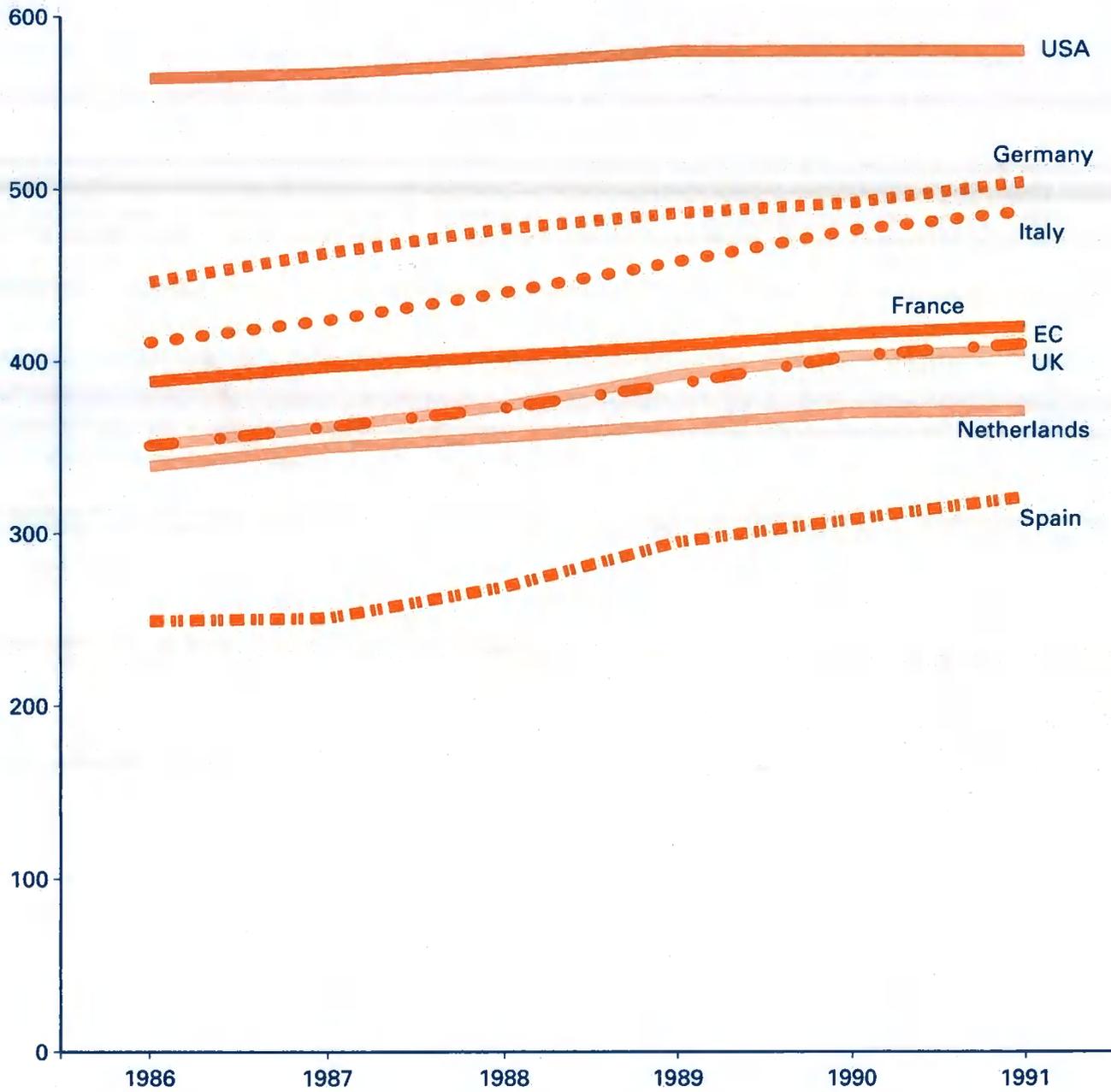
Registrations of New Cars



1982-1990 – W. Germany only

Source: SMMT from local statistics

Car Ownership
Cars per '000 population



Source: SMMT/Transport Statistics

Registration of New Cars in the UK by Manufacturer

Market Shares %	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Audi Volkswagen (VAG)	5.62	5.52	5.67	5.80	5.37	5.45	5.55	5.76	5.56	5.22
BMW	1.41	1.47	1.83	1.91	1.86	1.93	2.13	2.14	2.43	2.55
Citroen	1.44	1.40	1.50	1.83	2.29	3.02	2.89	3.03	3.36	4.04
Fiat	2.58	2.72	2.97	3.28	3.41	3.39	3.05	2.74	2.18	1.95
Ford	28.91	27.83	26.50	27.38	28.81	26.35	26.45	25.25	24.24	22.17
GM/Vauxhall	14.63	16.17	16.56	15.11	13.45	13.70	15.21	16.08	15.62	16.70
Honda	1.05	1.08	1.04	1.09	1.23	1.21	1.17	1.58	1.77	1.68
Jaguar	0.39	0.43	0.44	0.40	0.55	0.65	0.62	0.53	0.36	0.35
Mercedes	0.75	0.83	0.99	1.06	1.08	1.08	1.23	1.32	1.30	1.41
Nissan	5.84	6.08	5.76	5.84	5.67	6.08	6.02	5.32	4.03	4.66
Peugeot/Talbot	4.44	4.00	4.02	4.60	5.03	5.72	6.04	6.16	7.26	7.78
Renault	3.51	3.42	3.85	3.68	3.91	3.86	3.83	3.36	3.99	4.59
Rover	18.18	17.84	17.90	15.80	14.99	15.01	13.57	14.01	14.40	13.51
Saab	0.53	0.50	0.46	0.55	0.52	0.48	0.53	0.59	0.58	0.62
Toyota	1.77	1.87	1.89	1.90	1.90	1.80	1.84	2.12	2.59	2.65
Volvo	3.42	3.38	3.25	3.66	3.52	3.63	3.55	3.29	2.94	2.71
Others	5.53	5.46	5.37	6.11	6.41	6.64	6.32	6.72	7.40	7.41
Total Market (Million)	1.79	1.75	1.83	1.88	2.01	2.22	2.30	2.01	1.59	1.59

Source: Society of Motor Manufacturers and Traders





'The Consumer View'

INTRODUCTION TO THE RESEARCH

The 1993 Lex Report on Motoring presents the findings of a survey specially conducted for Lex Service. This is the fifth in a series of annual surveys conducted by MORI among Britain's regular car drivers, defined as those driving at least once a month.

The research follows the pattern of the annual reports published between 1989 and 1992 and was designed to provide a detailed insight into Britain's drivers - who they are, how they behave and their attitudes and lifestyle. Several questions from the previous surveys have been repeated so that we can understand how Britain's drivers are changing over the years, and the significant trends are highlighted in the text.

Terms

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

MORI interviewed a representative quota sample of 2,011 drivers in 187 constituency sampling points throughout Great Britain. The sample was boosted to bring the total number of those with a company car up to 524 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 24 October and 8 November 1992.

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

	Number interviewed %	% of total sample (weighted)
Car provided by employer	363	7
Car bought as business expense	173	4
TOTAL	524	11



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This total includes a small number of cars (26) provided by an employer of a different member of the household from the respondent. These have been excluded from some tables where we are concerned with the views of those who are responsible for the company cars.

Statistical Reliability and Definitions

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

Use of Information

Figures from this Report may be freely quoted (except for commercial purposes), provided reference is made to the 1993 Lex Report on Motoring, 'The Consumer View', published by Lex Service PLC, with research by MORI.



STATISTICAL PROFILE OF BRITAIN'S CAR DRIVERS

There are estimated to be 25.5 million regular drivers (who drive at least once a month) in Britain representing 58% of the adult population aged 17 and over.

Britain's drivers are predominantly male (57%) and more likely to be middle class (51%) than the population as a whole (41%). They are also more likely to be aged 25-54 (63%) than the general public (49%). One third (39%) are married with children aged under 16 while one in eight (12%) are married aged 17-44 and with no children. One in five (20%) are "empty nesters" (i.e. married and aged 45-64 with no children at home).

Around one in three drivers (31%) drive a car bought new, and one in nine (11%) drive a company car.



Profile of Britain's Car Drivers

	General Public (1992) %	Drivers (1988) %	Drivers (1990) %	Drivers (1991) %	Drivers (1992) %
Sex					
Male	47	58	59	59	57
Female	53	42	41	41	43
Age					
17-24	17	11	11	11	9
25-34	19	26	26	24	28
35-54	30	38	40	39	36
55-64	15	14	11	13	14
65+	19	11	12	13	13
Class					
AB	18 }41	24 }52	26 }52	25 }53	23 }51
C1	23	28	27	28	28
C2	28 }59	31 }48	31 }48	29 }47	29 }52
DE	31	17	17	18	20
Life style					
Young, single male, no children (17-24)	5	4	4	4	3
Young, single female, no children (17-24)	3	1	2	2	1
Single, no children (25-64)*	11	9	9	9	7
Single, with children (17-64)*	5	4	5	5	2
Married, no children in h/h (17-44)#	10	12	10	12	12
Married, children under 16 (17-64)#	26	40	40	37	39
Empty nesters (45-64)	19	18	18	19	20
Retired (65+)	20	11	11	13	16

* includes widowed, divorced, separated

includes other couples



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Driver Profile by Region

(Don't knows excluded)

	All drivers (2011)	Scotland/ North (733)	Midlands (356)	London (244)	South East/ East Anglia (400)	Wales/ South West (278)
	%	%	%	%	%	%
Sex						
Male	55	60	59	54	49	48
Female	45	40	41	46	51	52
Age						
17-24	9	11	10	8	8	5
25-34	28	29	27	27	30	25
35-54	36	33	37	37	36	40
55-64	14	16	15	12	12	14
65+	13	11	11	16	14	16
Mainly Drive						
Private Car	89	92	89	89	87	88
Company Car	11	8	11	11	13	12
No of Cars Owned						
One	59	64	55	64	51	58
Two+	41	36	45	36	49	42
Car Driven Most Often Bought...						
New	31	32	25	38	31	30
Second Hand	69	68	75	62	69	70
Miles Driven per Year						
0-6000	32	30	33	32	33	34
6001-20,000	60	61	58	61	59	58
20,001+	8	9	9	7	8	8
Average miles						
	10,100	10,400	10,000	9,700	10,000	10,000

Source: Lex Report on Motoring 1993, The Consumer View/MORI



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Profiles of Driver Types I
(Don't knows excluded)

	All (2,011) %	Male (1,204) %	Female (807) %	17-24 (157) %	65+ (218) %	London (244) %
Car Driven Most						
Bought new	31	32	29	17	46	38
Bought second hand	69	68	71	83	54	62
Engine Size						
Up to 1400cc	47	41	56	56	58	43
1401-2000cc	47	51	40	38	40	49
Over 2000cc	6	8	4	6	2	8
Age of car						
Up to 3 years	29	31	27	18	26	26
Over 3 to 6 years	32	33	32	27	34	40
Over 6 years	39	36	41	55	40	34
Bought						
Privately	89	87	92	95	98	89
Provided by employer	7	9	5	2	*	9
Bought as business expense	4	4	3	3	2	2
Total Company	11	13	8	5	2	11
Expected length of ownership Years						
Average	4.23	4.13	4.37	3.39	6.31	4.82
Miles Car Driven Miles						
Average	10,100	11,200	8,600	10,200	6,900	9,700
Cost of Car						
Average	£4,700	£5,000	£4,300	£3,000	£5,300	£5,000

Based on car driven most often.

Source: Lex Report on Motoring 1993, The Consumer View/MORI

Profiles of Driver Types II
(Don't knows excluded)

	All (2,011) %	Normally drive:		Car driven most often bought	
		Private Car (1,444) %	Company Car (524) %	New (762) %	Second hand (1,236) %
Base:					
Car Driven Most ...					
Bought new	31	26	74	100	0
Bought second hand	69	74	26	0	100
Engine size					
Up to 1400cc	47	50	20	46	48
1401-2000cc	47	45	65	47	46
Over 2000cc	6	5	15	7	6
Age of Car					
Up to 3 years	29	24	72	64	13
Over 3 to 6 years	32	34	19	26	35
Over 6 years	39	42	9	10	52
Bought					
Privately	89	100	0	74	96
Provided by employer	7	0	63	20	1
Business expense	4	0	37	6	3
Total company	11	0	100	26	4
Expected length of ownership					
Average years	4.23	4.41	2.80	4.33	4.19
Miles car driven					
Average	10,100	8,900	19,000	11,900	9,200
Cost of car					
Average	£4,700	£4,300	£11,000	£9,100	£3,200

See p30 for information on cars

Source: Lex Report on Motoring 1993, The Consumer View/MORI



Summary of Key Findings by Driver Type I

Base:	All (2,011) %	Male (1,204) %	Female (807) %	17-24 (157) %	65+ (218) %
Normally drive to work	53	54	52	57	19
Car can run on unleaded petrol	56	56	56	45	57
Responsible for servicing	78	94	57	75	92
#Service car at main dealer	32	32	32	10	36
#Service car by yourself/ someone else in household	22	28	10	34	17
No of cars in household					
1	59	61	56	43	81
2	34	31	37	35	16
3+	8	8	6	23	3
Used 'Park and Ride'	25	24	27	19	28
Have car telephone	3	4	1	3	0
Fire extinguisher in car	18	20	14	11	25
First aid kit in car	32	34	31	24	42
Delayed repurchase due to economic climate	18	17	18	12	7
Dependent on car	81	81	81	69	87
Would use car less if public transport were better	35	34	36	33	34
Bought new car in last 2 years	10	11	8	6	12
Bought used car in last 2 years	34	41	26	45	23

#Based on all responsible for getting car serviced (1,591)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



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Summary of the Findings by Driver Types II

	All (2,011) %	Normally drive:		Car driven most often bought	
		Private Car (1,444) %	Company Car (524) %	New (762) %	Second hand (1,236) %
Base:					
Normally drive to work	53	50	74	50	54
Car can run on unleaded petrol	56	54	73	80	46
Responsible for servicing	78	78	73	77	78
#Service car at a main dealer	32	28	66	66	17
#Service car by yourself/ someone else in household	22	24	8	7	28
No of cars in household					
1	59	62	41	56	60
2	34	31	51	38	32
3+	8	7	8	6	8
Used 'Park and Ride'	25	25	28	26	25
Have car telephone	3	1	16	6	1
Fire extinguisher in car	18	17	22	19	17
First aid kit in car	32	31	41	42	28
Delayed repurchase due to economic climate	18	18	17	16	18
Dependent on car	81	80	90	83	80
Would use car less if public transport were better	35	36	25	34	35
Bought new car in last 2 years	10	10	14	31	1
Bought used car in last 2 years	34	35	25	8	46

#Based on all responsible for getting car serviced (1,591)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



Summary of Key Findings by Driver Types III

	All drivers (2011) %	Scotland/ North (733) %	Midlands (356) %	London (244) %	South East/ East Anglia (400) %	Wales/ South West (278) %
Normally drive to work	53	55	54	62	48	47
Car can run on unleaded petrol	56	55	54	59	56	59
Responsible for Servicing	78	79	28	83	74	72
#Service car at a main dealer	32	28	25	32	35	25
#Service car by yourself/ someone else in household	22	20	27	15	23	25
No of cars in household						
1	59	64	55	64	51	58
2	34	31	36	29	38	35
3+	7	5	9	7	11	7
Used 'Park and Ride'	25	19	26	20	36	29
Have car telephone	3	3	4	3	1	2
Fire extinguisher in car	18	18	17	17	20	14
First aid kit in car	32	25	33	36	38	40
Delayed repurchase due to economic climate	18	16	19	20	22	12
Dependent on car	81	80	81	77	81	87
Would use car less if public transport were better	35	30	30	49	36	39
Bought new car in last 2 years	10	11	10	9	8	8
Bought used car in last 2 years	34	38	36	28	29	35

#Based on all responsible for getting car serviced (1,591)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



STATISTICAL PROFILE OF BRITAIN'S CARS

During the course of the interview information was collected about each car in the household up to a maximum of three cars. On this basis 30% (7 million) of the cars on Britain's roads are still owned from new and 70% (16 million) second hand. One in eight were either provided by an employer (8%) or bought as a business expense (4%).

Half the cars on the road have an engine size of up to 1400cc although this drops to just 19% of cars bought by employers.



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Profile of Britain's Cars
(Don't knows excluded)

Base:	Cars (3,066) %	Bought new (1,069) %	Bought second hand (1,955) %	Private (2,281) %	Company Cars		
					All Co. Cars (671) %	Provided by employer (457) %	Business expense (214) %
Bought new	30	100	0	25	70	86	40
Bought second hand	70	0	100	75	30	13	60
Engine size							
Up to 1400cc	48	46	49	52	20	19	21
1401-2000cc	45	46	44	42	66	71	58
Over 2000cc	7	7	7	6	14	11	22
Type of Ownership							
Bought privately	88	73	95	100	0	0	0
Provided by employer	8	22	1	0	64	100	0
Business expense	4	6	4	0	36	0	100
Age of Car							
0-3 years	29	64	13	24	69	81	49
3-6 years	31	25	34	33	21	16	30
Over 6 years	40	10	52	43	10	3	22
Mean age (years)							
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
Five Year Trends							
1992		30	70	88	12	8	4
1991		30	70	86	14	9	5
1990		34	66	86	14	9	5
1989		33	67	85	14	10	4
1988		32	66	85	13	8	4

Source: Lex Report on Motoring 1993, The Consumer View/MORI

DRIVERS' BEHAVIOUR

CAR OWNERSHIP AND EXPECTATIONS

Those households in Britain with at least one driver have 1.51 cars on average - a slight decline since 1991. The proportion of drivers in one car households has barely changed at around 59% along with the proportions of those in two and three or more car households - 33% and 8% respectively. This suggests the economic conditions had their main impact on car ownership between 1990 and 1991 as a result of a decline in multi-car households.

Drivers remain optimistic about the future. In two years' time 37% expect to be in two car households and 6% in three car households - although both these figures are down on 1991 expectations for 1993. To compensate only 55% expect to be living in one car households.

Overall the average number of cars per household with a driver is expected to rise to 1.55 by 1993. One in ten drivers expect to see an increase in the number of cars in their household in two years' time, while 5% anticipate a decline; the rest expect no change. The main shift is evident in one car households with 13% expecting to increase the number of cars in their household and only 1% expecting a decline over the next two years. By contrast of those in two car households 11% expect a decline, 7% an increase.

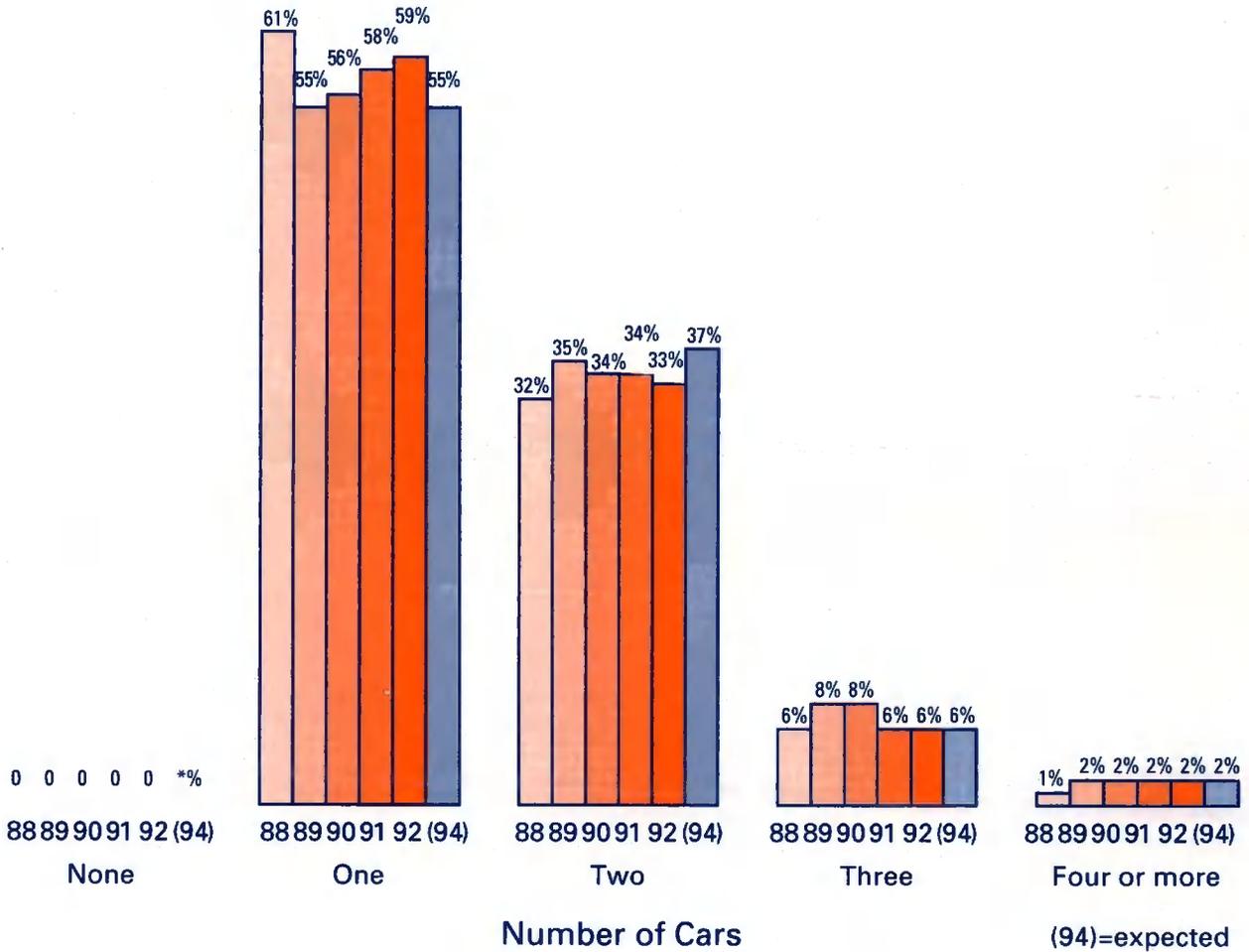
	Cars in household now			
	One (1183)	Two (676)	Three (113)	Four+ (39)
Base:				
Expected number of cars in 2 years time:	%	%	%	%
None	1	0	0	0
One	84	11	4	3
Two	12	81	24	18
Three	*	6	58	10
Four+	*	1	7	54
Don't know	3	1	7	15
Mean	1.1	2.0	2.7	3.6



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Car Ownership and Expectations

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



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



1993 LEX REPORT ON MOTORING – The Consumer View

The proportion of respondents who say the number of cars in their household has increased compared with **one year ago** (8%) is exactly matched by those who say it has decreased. However, those claiming an increase in number of cars in the household compared with **two years ago** is somewhat higher (14%) than those claiming a decrease (10%). There is a difficulty of making these figures consistent with our measures of cars per household two years ago because we exclude from the sample people who have no cars in the household, so our sample this time would exclude drivers of two years ago who no longer have a car and include drivers now who had no car in 1990.

Hence, if car ownership remained static we would expect the number of respondents claiming an increase in the number of cars in their household to always be greater than the number who claimed a decline. The fact that those claiming increased car ownership since last year are less in number than those claiming a decline is therefore further evidence of a slight actual decline.

The main reasons given for past or expected future reduction in the number of cars in the household were that someone in the household had moved out (37%) or was expected to move out (49%). Other factors were somewhat less important but featured the cost of motoring and reduced household income.

One in twenty drivers claim that at least one of the cars in their household is waiting to be sold. Normally this applies to just one car, in a few cases two cars. This grosses up to an estimated 1.3 million cars waiting to be sold or around 5% of all cars in private homes in Britain.

GROSSED UP ESTIMATES

The five Lex Reports on Motoring, based on surveys late in each year 1988 to 1992*, provide a series of estimates for actual car ownership and expectations.**

Drivers remain optimistic in their expectations for future ownership. They expect to increase the number of cars in their household from an average 1.51 now to 1.55 in two years' time. However this expectation is the lowest yet recorded in the Lex Surveys which peaked at an expectation of 1.67 cars per household in 1991 among those interviewed in 1989, showing the effects of three years' recession.

Expected Increase in Car Ownership in Two Years' time

Survey in	1988	1989	1990	1991	1992
	2.3 million	2.5 million	1.6 million	1.4 million	1.4 million

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

**Over the three years from 1988 to 1992 actual ownership rose from 21.0 million to 23.2 million. In 1991 we saw a very slight drop to 23.0 million which remained unchanged in 1992.

1993 LEX REPORT ON MOTORING – The Consumer View

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



	H/hs in GB (DoE)	H/hs with cars (OPCS)	Ave. Cars per h/h (MORI)	Grossed up m	1988 Cars per h/h m	1989 Cars per h/h m	1990 Cars per h/h m	1991 Cars per h/h m	1992 Cars per h/h m	
1988	21.5	66	1.48	21.0						
1989	21.7	66	1.58	22.6						
1990	21.9	67	1.58	23.2	1.59	23.3				
1991	22.1	68	1.53	23.0		1.67	25.1			
1992	22.4 e	68 e	1.51	23.0			1.63	24.8		
1993	22.6 e	68 e						1.59	24.4	
1994	22.8 e	69 e							1.55	24.4

e = estimated

Source: Lex Report on Motoring 1993, The Consumer View/MORI



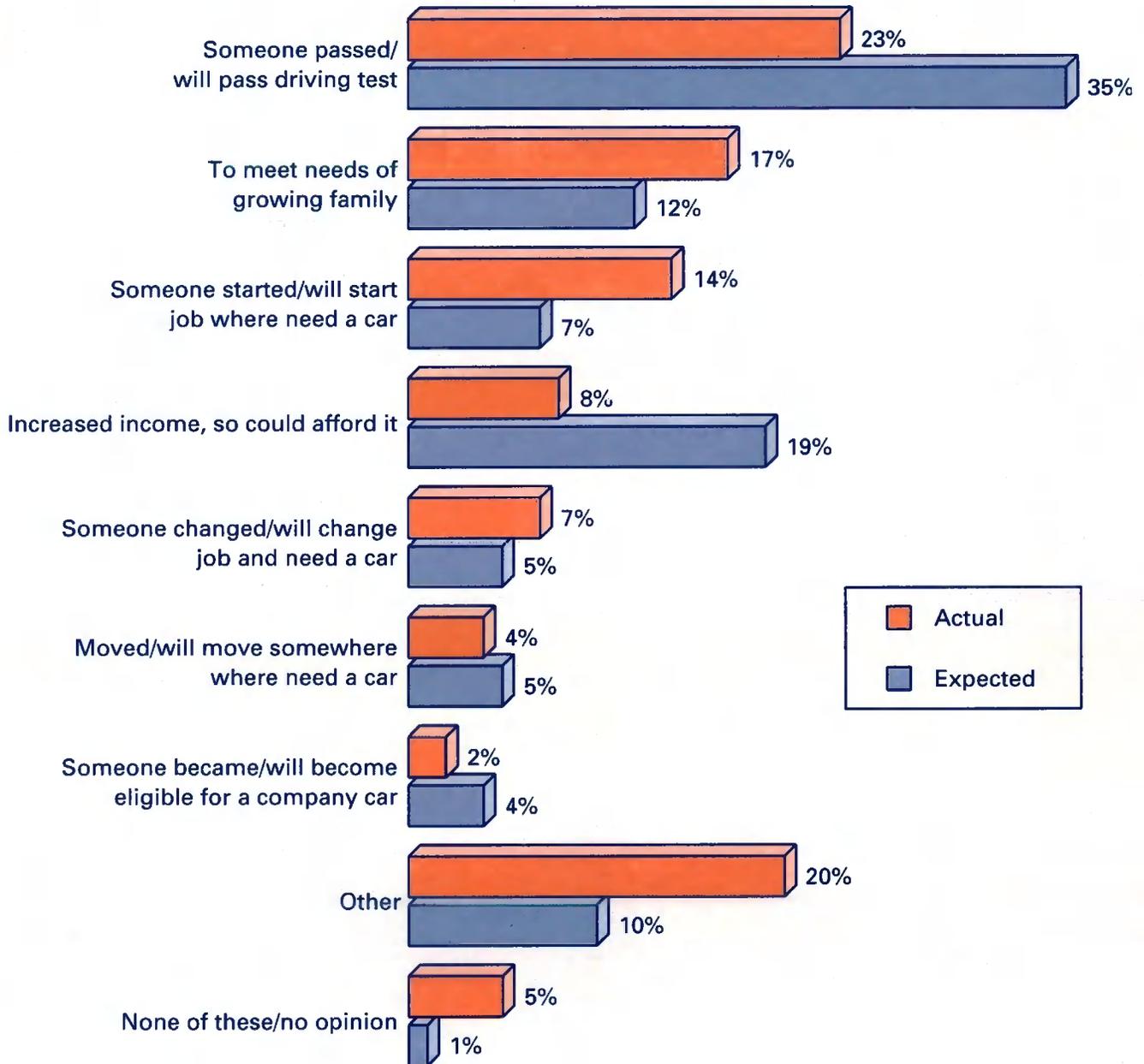
REASONS FOR INCREASING CAR OWNERSHIP

The main trigger for getting an additional car is someone in the household passing their driving test and wanting a car. This reason is given by one in four (23%) of those claiming an increase in car ownership in the past year as it is by 35% of those expecting an increase in the next two years. It is particularly important for those households which already have two or more cars.

Next important, but still significant, were increased family needs, particularly as a reason for recent increases. An expectation of higher income was a more common explanation for expected increases than someone starting a job where they need a car.

Reasons for Increasing Car Ownership

Q Which, if any, of these events was/do you think will be the main reasons for your **increasing** the number of cars in the household where you live?



Actual - Base: All who have more cars in their household than one year ago (145)

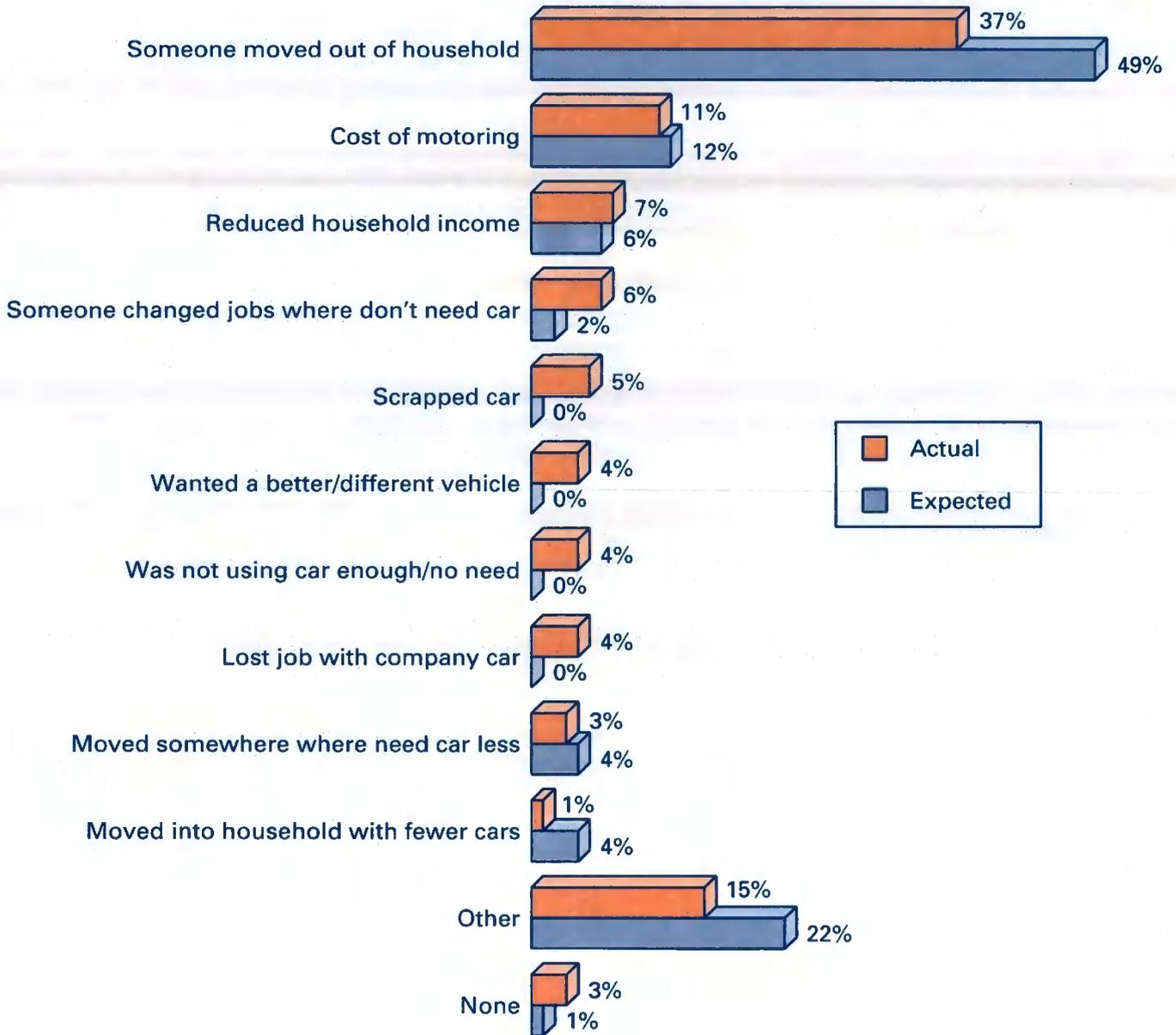
Expected - Base: All who expected to have more cars in their household in two years' time (214)

Note: Reasons only shown if nominated by at least 3% as an actual or an expected reason

Source: Lex Report on Motoring 1993, The Consumer View/MORI

Reasons for Decreasing Car Ownership

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



Actual Base: All who have fewer cars in household than one year ago and answered questions (133)

Expected Base: All who expect to have fewer cars in two years' time and answered question (100)

Note: Reasons only shown if nominated by at least 4% as an actual or expected reason

Source: Lex Report on Motoring 1993, The Consumer View/MORI



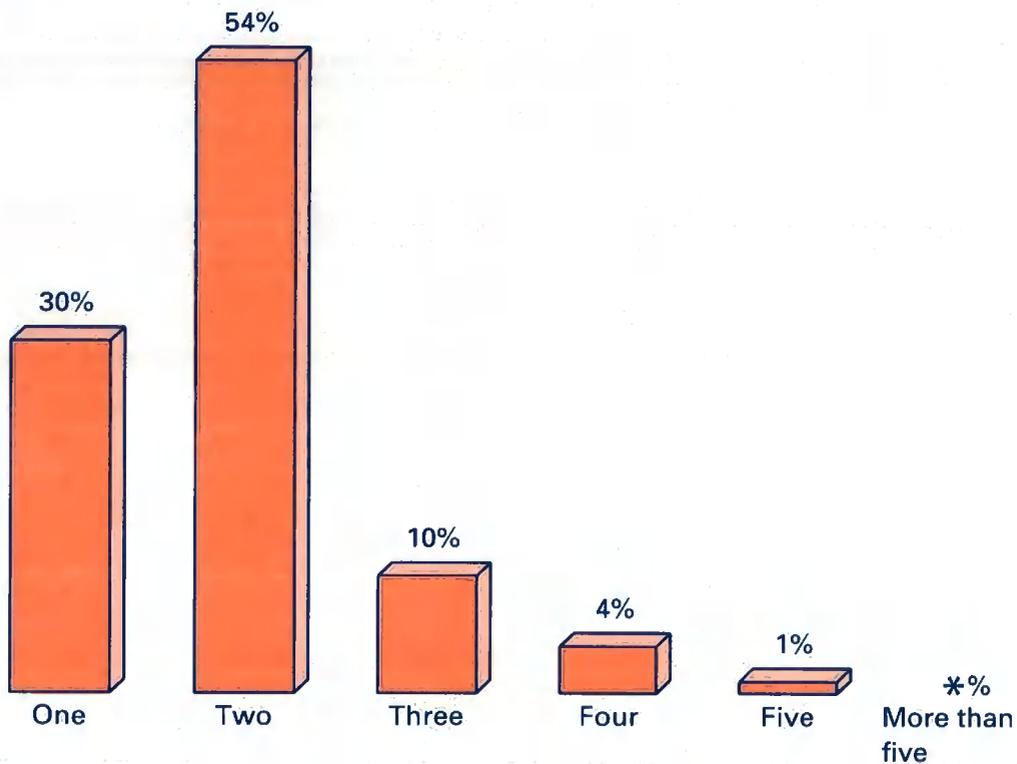
DRIVERS IN HOUSEHOLD

NUMBER OF DRIVERS IN HOUSEHOLD

Of those households with at least one regular car driver the mean number of drivers is 1.93. Just over half (54%) have two drivers, fewer than one in three (30%) have only one driver and 16% have three or more.

Each additional driver in a household - often young sons and daughters still living at home - has a significant effect on the number of cars that household is likely to have, and particularly the fourth driver after which the relationship is less strong. In one driver households the average number of cars is 1.07 rising to 3.6 in five driver households (see graph).

Q How many people in your household drive at least once a month?

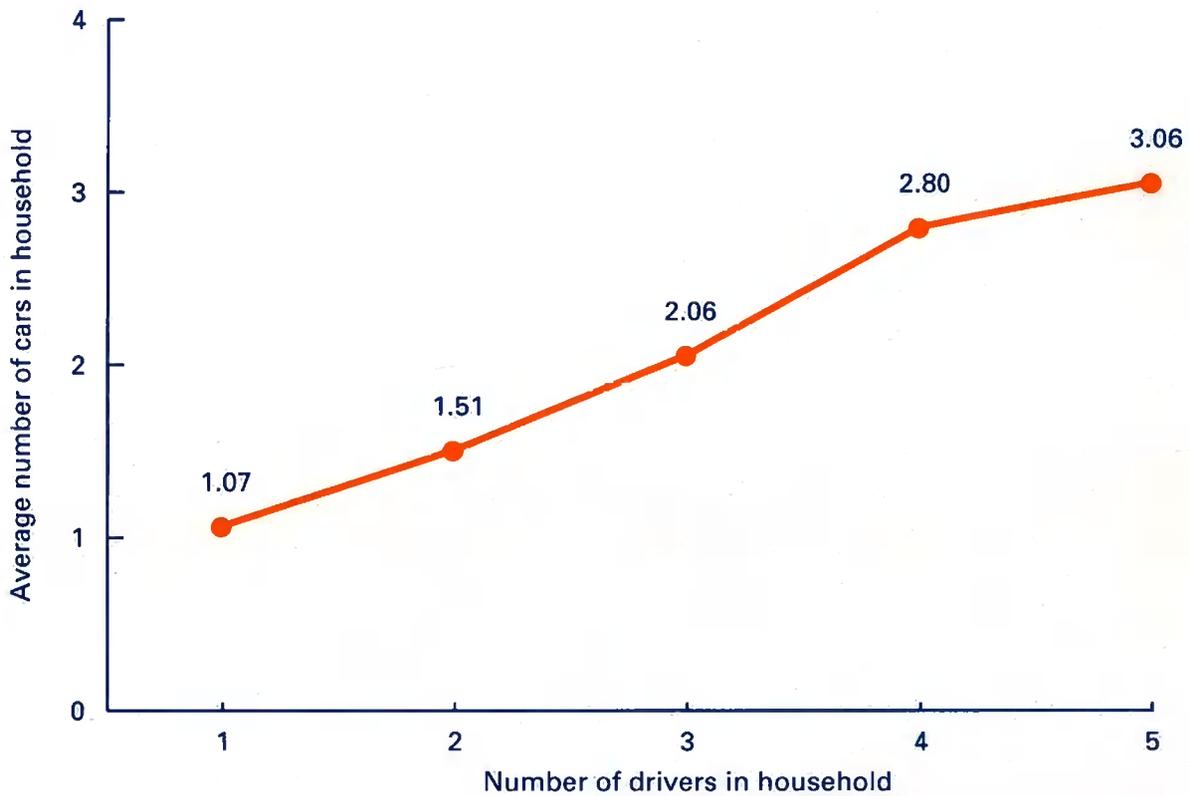


Base: All drivers (2,011)



Number of Cars versus Number of Drivers in Household

- Q How many people in your household drive at least once a month?
- Q How many cars are there in your household now?



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



LENGTH OF CAR OWNERSHIP

Drivers expect to keep their cars an average of 4.23 years which represents an increase for the fourth consecutive year and goes a long way to explaining the mechanism by which the recession has hit the motor industry. This is accounted for by private car buyers who now expect to keep their cars an average of 4.41 years - an increase of 0.14 years since 1991 - rather than company car owners who seem to be expecting to keep their cars an average of 2.8 years, virtually the same as last year.

Drivers of both new and used cars expect to keep their cars longer than in any previous survey with new car buyers expected to keep them an average of 4.33 years and used car buyers an average of 4.19 years.

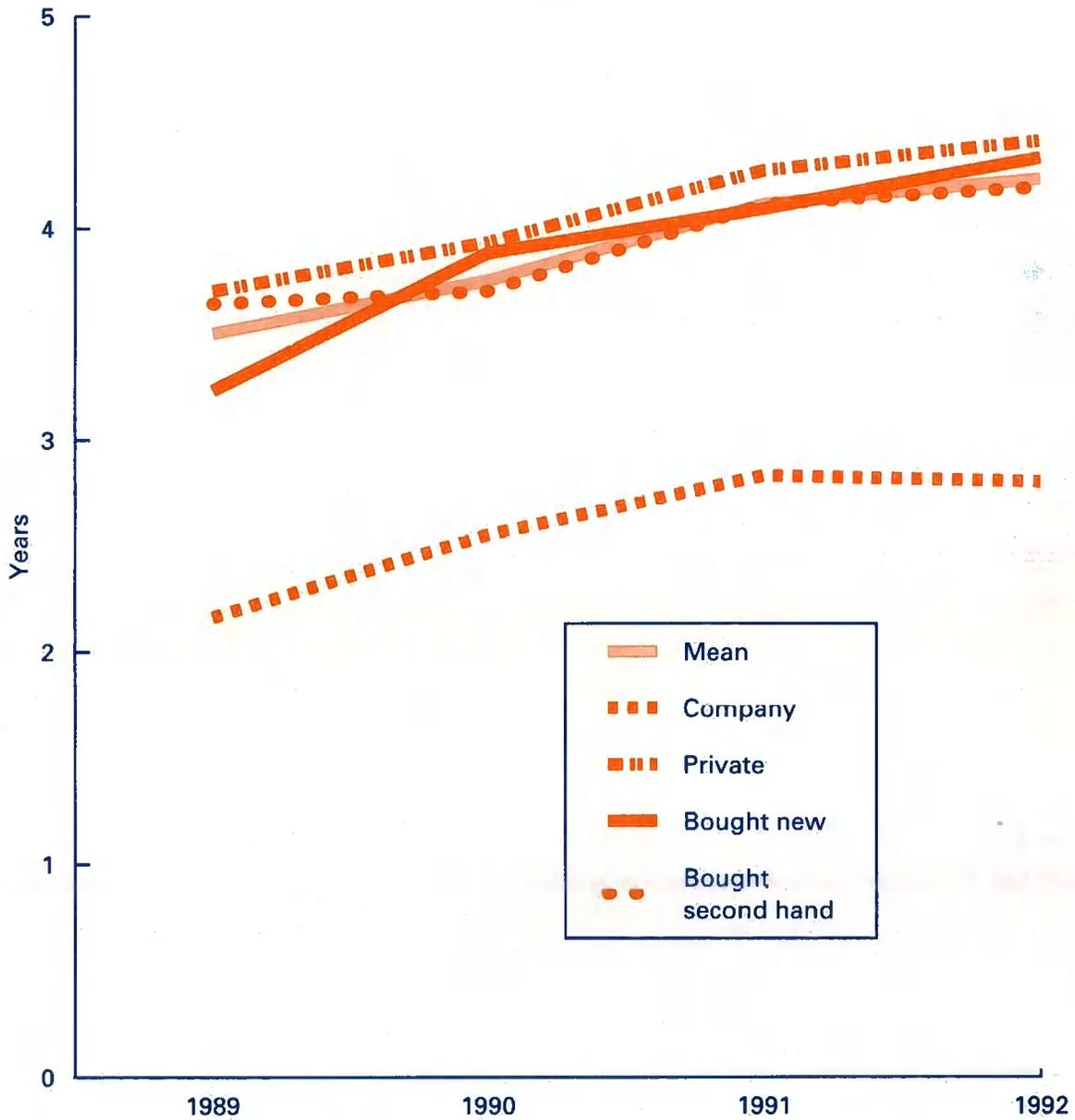
Over the past three years, the expected length of ownership of cars bought new has extended by just over one year, equivalent to a 33% drop in demand for new cars. SMMT registration figures record a 30% decline over the same period.

The expected length of ownership of second hand cars increased by around six months over the past three years which would represent a 15% decline in the market since 1989.

Those with older cars were more likely to intend keeping them longer. Thus, the average expected length of ownership of cars less than three years old was 3.1, years but it was 5.1 years for cars over 6 years old.

Length of Car Ownership

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



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993/MORI



ANNUAL MILEAGE

On average, Britain's drivers estimate that the car they drive most often is driven 10,100 miles a year. Although the survey figures are based on respondents' estimates and cannot be taken as totally accurate, they are consistent with the Department of Transport's estimates for 1991 for cars and taxis of 10,000 miles.

One third (30%) of drivers estimate they drive only 6,000 miles a year or less, and slightly more (38%) reckon they drive between 6 and 12,000 miles a year.

The greatest number of miles are travelled by men (11,200 miles) especially company car drivers (19,000). Miles driven is also highly correlated with household income, with average miles ranging from 6,000 in the lowest income band to 13,600 in the highest.

Of the 10,100 miles the average driver reckons the car they drive most often is driven in a year, 3,500 miles are estimated to be driven in connection with the driver's or someone else's work (excluding driving to or from work). Male drivers reckon the cars they drive most are driven an average 4,400 miles in connection with work out of a total average of 11,200 miles, while female drivers reckon their cars are driven an average of just 2,200 miles in connection with work out of a total of 8,600 miles. By age, driving in connection with work is highest, as one might expect, for those aged 25-54 - around 4,300 miles.

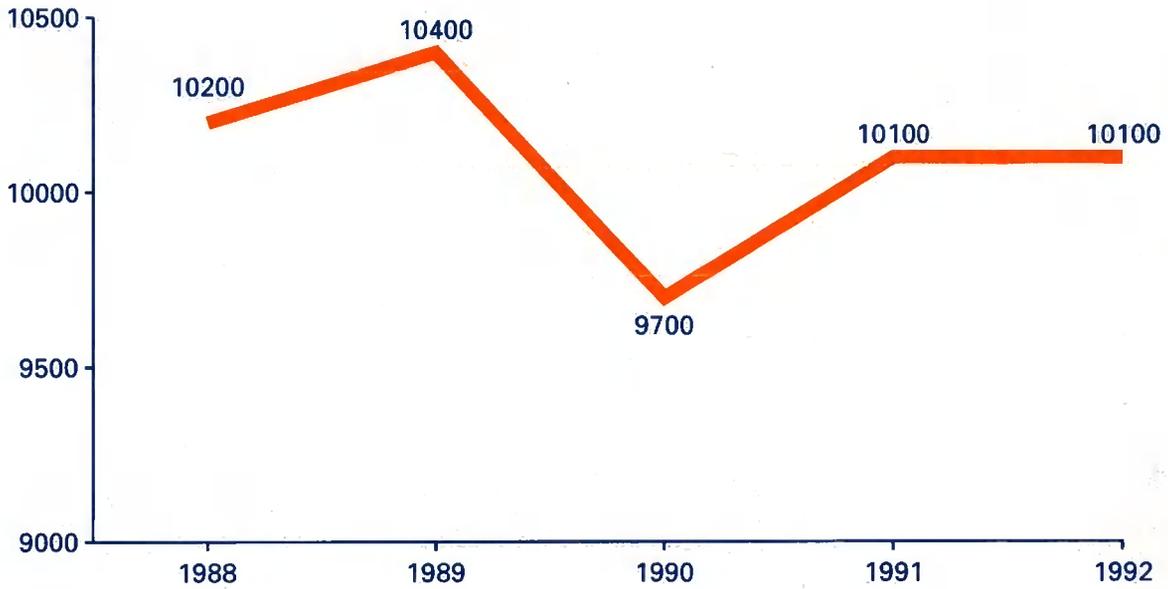
Company car drivers reckon that an average 12,800 out of the 19,000 miles their cars are driven each year are driven in connection with work, although owners of private cars also reckon that 2,200 of their average 8,900 are driven in connection with work. Indeed one in four company car drivers consider their cars are driven over 18,000 miles a year in connection with work and the proportion who reckon their cars are driven less than 2,000 miles with work at all has declined from 18% last year to just 13% now.

Those who do any work related driving say the car they drive most often is driven on average 7,300 miles per year on business. Private cars used for work (approximately 41% of all private cars) average around 5,500 miles.

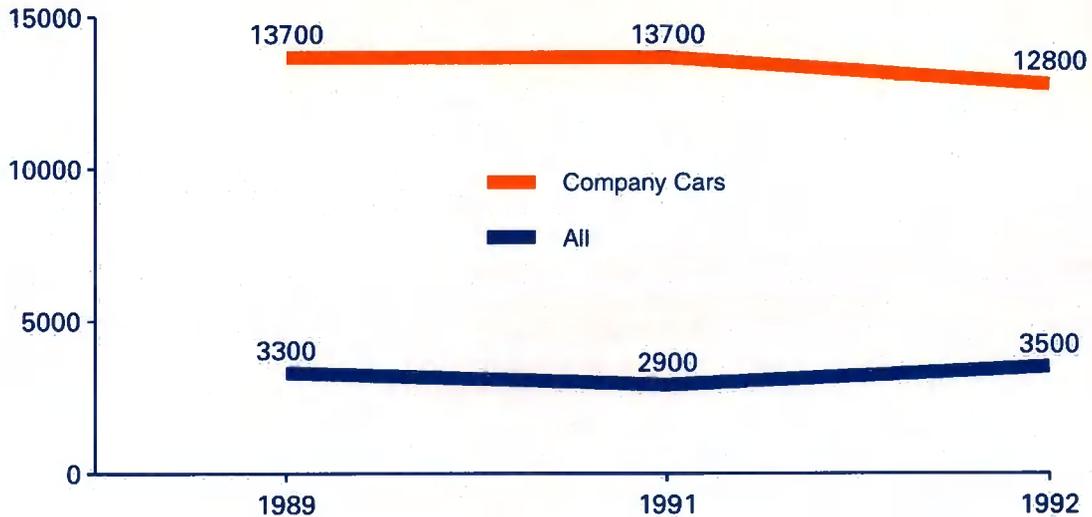


1993 LEX REPORT ON MOTORING - The Consumer View

Average Miles Driven - Trends



Average miles driven in connection with work - Trends



Base: All drivers (2,011)

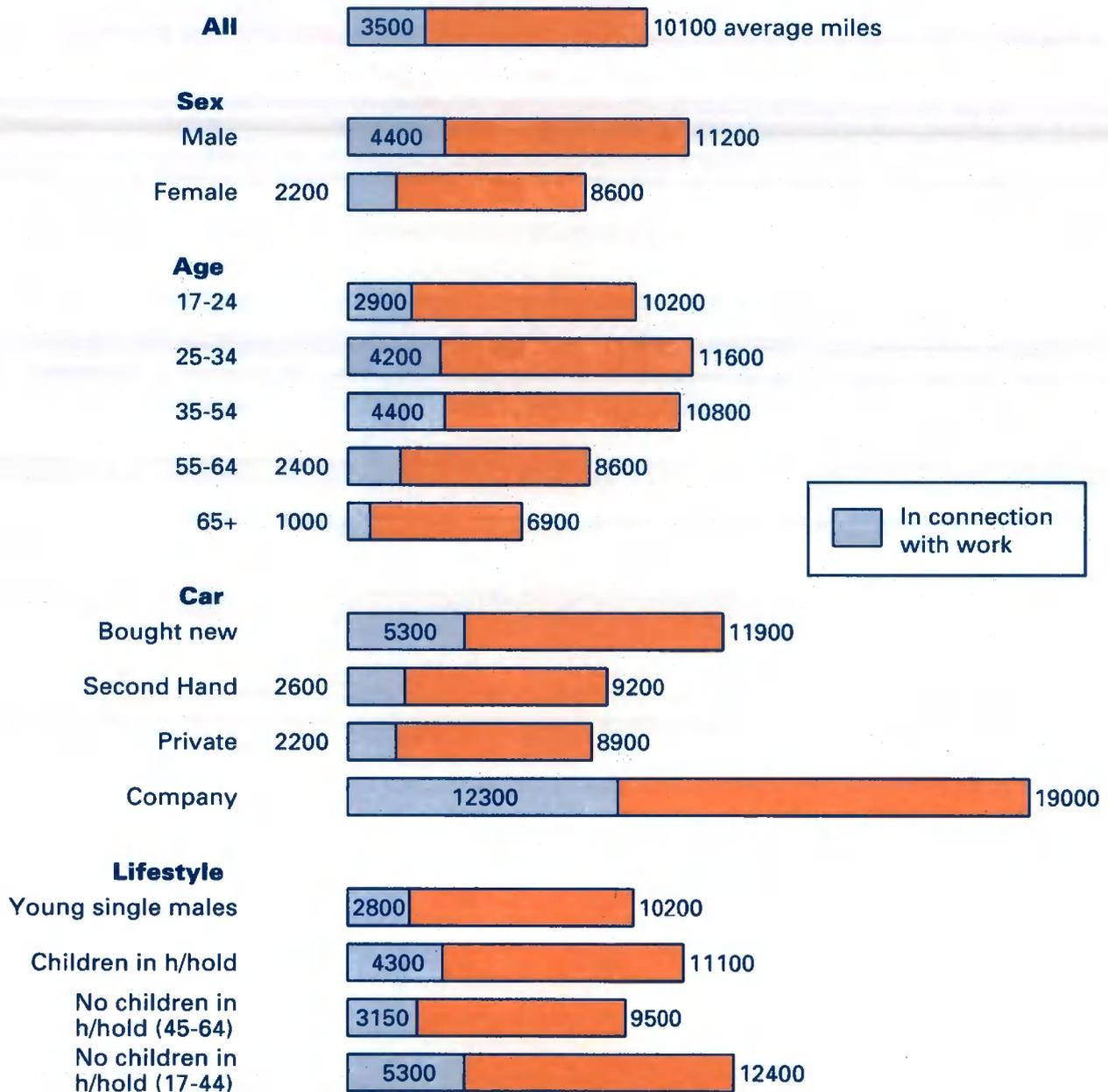
Source: Lex Report on Motoring 1993, The Consumer View/MORI



1993 LEX REPORT ON MOTORING – The Consumer View

Use of Car for Work

- Q Approximately how many miles is the car driven a year, on average?
- Q And how many of these miles, if any, is the car driven in connection with your, or someone else's work (not including driving to or from work)?



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



DRIVING TO WORK

DRIVING TO WORK

Around five out of six drivers who work full or part time normally drive to their place of work and the proportion is much the same for private and company car drivers

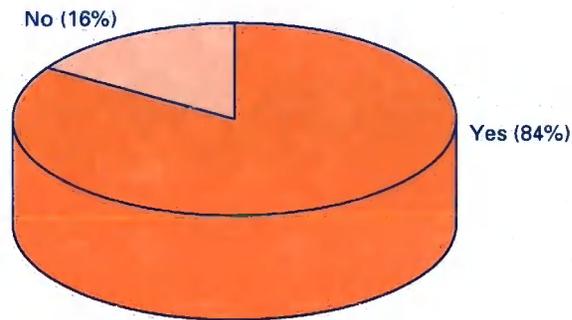
When they get there most of them also have a free parking space - 81% claim this facility although there are marked regional variations; in the Midlands, 87% of those who normally drive to work have a free parking space whereas in London only 64% do. Of course this could range from a paid-for space in an enclosed private car park to use of a large open-air factory parking facility.

Eighty-one per cent of private car owners who drive to work have a free parking space and 80% of respondents whose employers bought their car do too, although rather fewer (60%) of respondents who bought their car as a business expense and drive to work can count on free parking when they get there.

Most people who normally drive to work and have a free parking space believe they would continue to do so just as often even if they did not have free parking; 76% held this view although 13% felt they would drive in to work less often, and 7% not at all. Drivers in London and the South-East were the least inclined to continue to drive in as often if they did not have free parking although even then 72% felt that taking away this facility would have no effect on their propensity to drive into work.

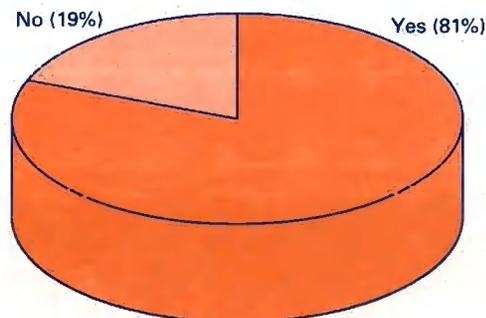
Driving to work

Q Do you normally drive to your place of work or not?



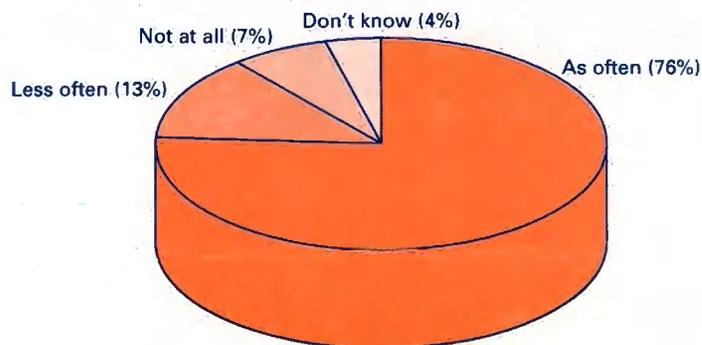
Base: All work full/part time drivers (1,222)

Q Do you normally have a free parking space when you get there or not?



Base: All who work full/part-time and drive to work (989)

Q If you did not have a free parking space would you drive...?



Base: All who work full/part time and have free parking (876)

EFFECTS OF ECONOMIC CLIMATE

The effects of the economic climate on drivers' behaviour continues to be marked. Eighteen per cent said they had delayed the purchase of a car - up slightly from last year and further increasing the number of cars awaiting replacement; fifteen per cent said they had bought a cheaper type of insurance and fourteen per cent said they used a cheaper way of servicing their car including DIY. These responses were particularly correlated with age - the younger the driver the more likely they were to respond in those ways. Eleven percent - the same as last year - said they had bought a second hand car instead of a new one and a further 13% said they delayed getting their car serviced.

Nine per cent said they had reduced the miles they had driven. Some 6% claimed that they had bought a cheaper or smaller car than they would have done, the same as in 1991. One in twenty had serviced their car more frequently because they had decided to keep it longer. Half, 53% had reacted to the recession in at least one of these ways.

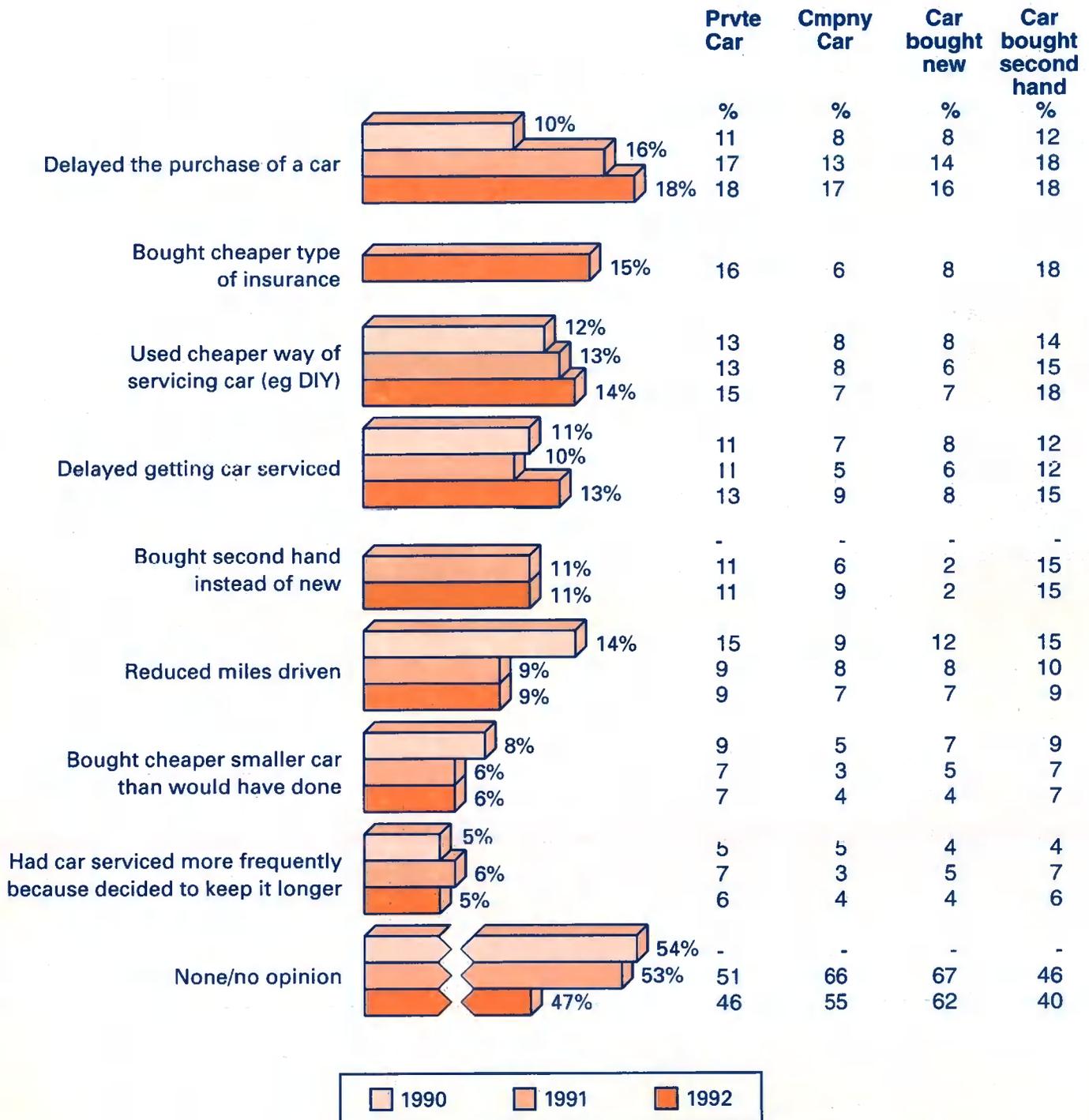
The trend towards delaying car purchase was most marked between 1990 and 1991 but remains relatively high.

The slight trend towards using a cheaper way to get their car serviced - particularly for second hand and private car drivers - suggests that the economic climate might be one explanation for the small shift away from using main dealers and towards using friends and acquaintances for car servicing (see p102). There has also been a slight increase in the proportion saying they have delayed getting their car serviced this year (13%) compared with the previous two years, even among company car drivers.

The lower proportions saying they had reduced the miles they drive in 1991 and 1992 (9%) compared with 1990 (14%) is consistent with a recovery in the claimed average number of miles driven annually which declined particularly sharply between 1989 and 1990.

Effects of Economic Climate

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



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

PARK AND RIDE SCHEMES

One in four drivers - 25% - claim to have ever used a 'park and ride' scheme and this rose to 36% in the South East/East Anglia, and 29% of those in Wales and the South West.

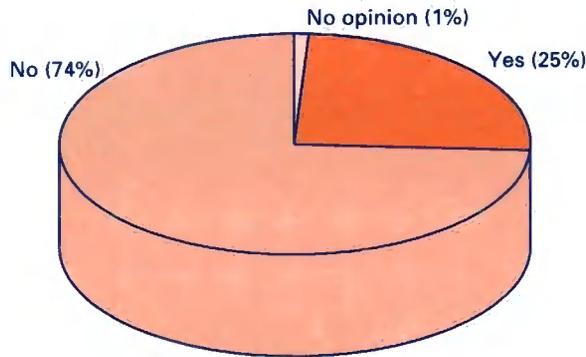
Around half the public (47%) say they are likely to use a 'park and ride' scheme if one operated for any of the major towns or cities they visited regularly, including seven per cent - 1.7 million drivers -who say they would be certain to use such a scheme.

Two-thirds (65%) of those who used a scheme have done so three times or fewer in the last six months, although one in four say they do not know how many times they have used one, which might in some cases mean quite a large number.

The main use seems to have been for shopping (55% of users and 63% of female users) and only 4% said commuting to work, mostly men. A further 31% gave some other reason related to their lifestyle/leisure activities.

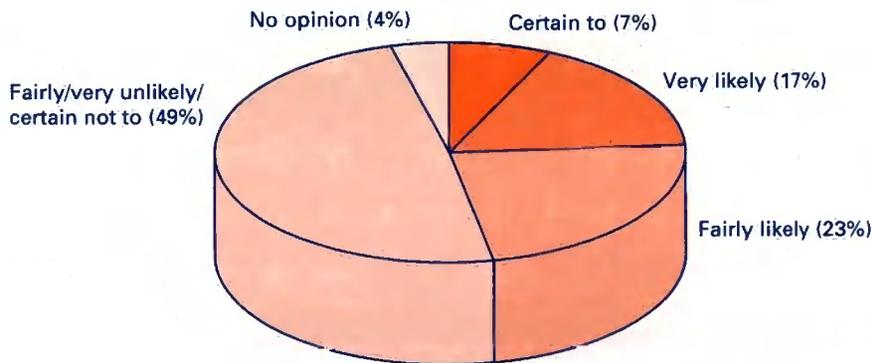
Park and Ride Schemes

Q Have you ever used a 'park and ride' scheme in this country where you park your car on the outskirts of a large town or city in a special car park and take a bus or train into the centre?



	Total (2,011)	Region	
		SE/E.Anglia (400)	Wales/SW England (278)
	%	%	%
Yes	25	36	29
No	74	63	70

Q If such a scheme operated for any of the major towns and cities you visited regularly, how likely do you think you would be to use it on a regular basis?



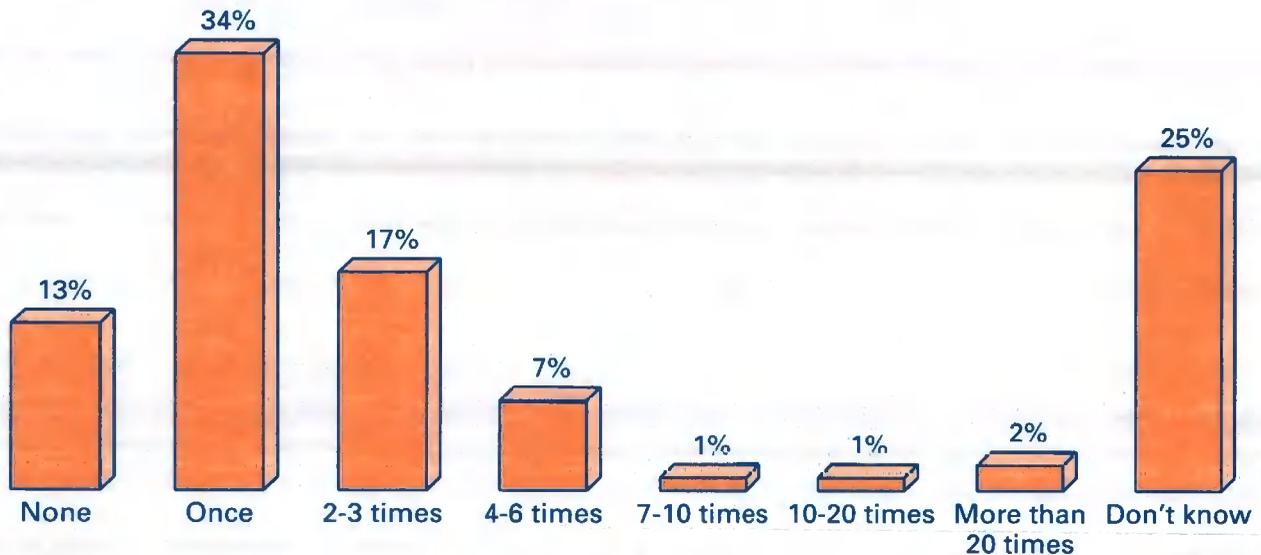
	Region			Age		Frequency of driving	
	All (2,011)	Scotland (178)	South East/ East Anglia (400)	17-24 (157)	55-64 (282)	Every/ most days (1,753)	Less than 1 wk- 1 month (18)
	%	%	%	%	%	%	%
Certain to	7	17	6	6	5	7	0

Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

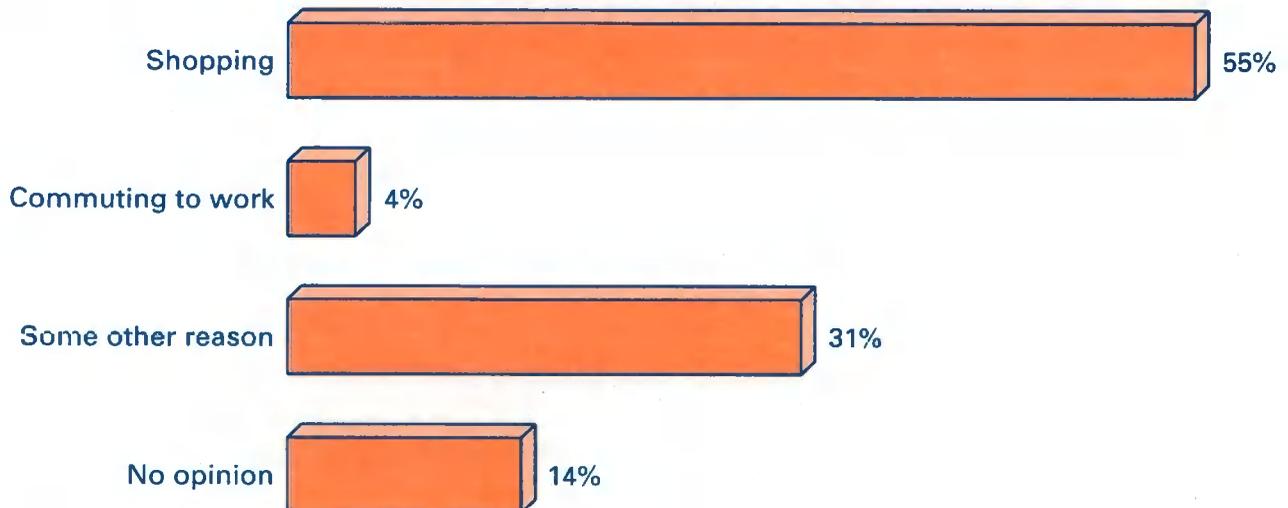
Park and Ride Schemes

Q And taking a single or return to be one journey, how often have you used a 'park and ride' scheme in the past six months?



Base: All who have used a 'park and ride' scheme (515)

Q And what have you used it for?



Base: All who have used a 'park and ride' scheme (515)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



USE OF UNLEADED PETROL



USE OF UNLEADED PETROL

The proportion of drivers who say they run their car on unleaded petrol has now risen to 48% - 12.2 million drivers. Four per cent say their cars run on diesel. Clearly, as we reach saturation, the proportion that would/could use unleaded petrol can only rise as new cars which use unleaded petrol replace older ones. A further 34% say that, although their cars cannot run on unleaded petrol, they would use it if it could. The proportion of drivers who do not or would not, use unleaded petrol (even if their car can use it) has risen slightly to 12% compared with 10% last year.

Drivers may now be realising that unleaded petrol may mean higher fuel consumption.

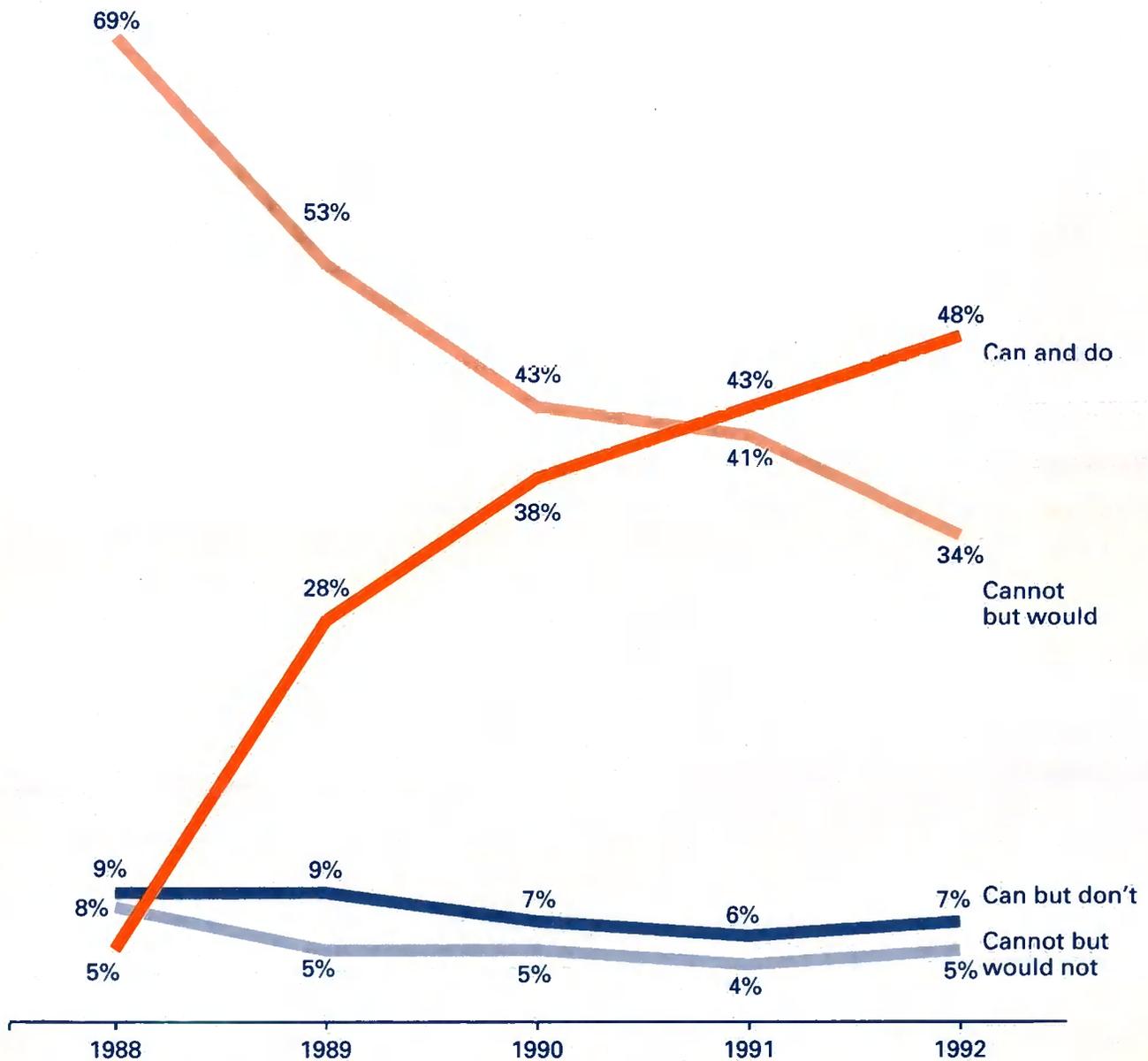
A third of those 44% who did not say their car can run on unleaded petrol believe it can be converted, but a quarter do not know whether it can be converted or not.



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Use of Unleaded Petrol

- Q Can your car run on unleaded petrol?
- Q Do you usually buy leded petrol?
- Q If your car could run on unleaded petrol would you buy it?



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

ITEMS PEOPLE HAVE IN THE CAR

On the basis of what drivers claim to normally have in the car when they are driving, many are not very well equipped for unforeseen emergencies. The most common item of equipment seems to be a cloth for wiping the window, which 87% claim to have with them normally, rising to 91% of those aged 55 and over.

Maps & Documents

Two drivers in three (63%) normally carry a road atlas of Great Britain, although this rises to 74% of Londoners and 80% of those who drive over 20,000 miles a year. Four out of ten take a street map of their local area. This latter item is also correlated with miles driven, with 56% of those driving over 20,000 miles a year carrying their local street map with them.

Sixty percent will take with them the car handbook. However, only half the drivers in Britain (46%) normally carry their driving licence and just one in three drivers (31%) normally carry their car documents with them. However, this rises to 48% of drivers aged 65 and over, and 40% of those who drive a car which was bought new. Only 27% of drivers of second hand cars tend to carry the car insurance documents with them.

Safety & Emergency

Safety and emergency related items are generally less commonly carried. Half (49%) normally carry a torch, two in five (39%) jump leads, though this rises to 43% of men. A first aid kit is carried by 32% of drivers about 2.5 million, but 42% of those aged over 65. First aid kits do not seem particularly popular in Scotland and North of England but seem to become more popular the further one moves south!

Three out of five (58%) normally have a tool kit in their car although this is much more common among male drivers (66%) than female drivers (49%), and those aged over 55 (72%), but it doesn't seem to vary according to the number of miles driven.

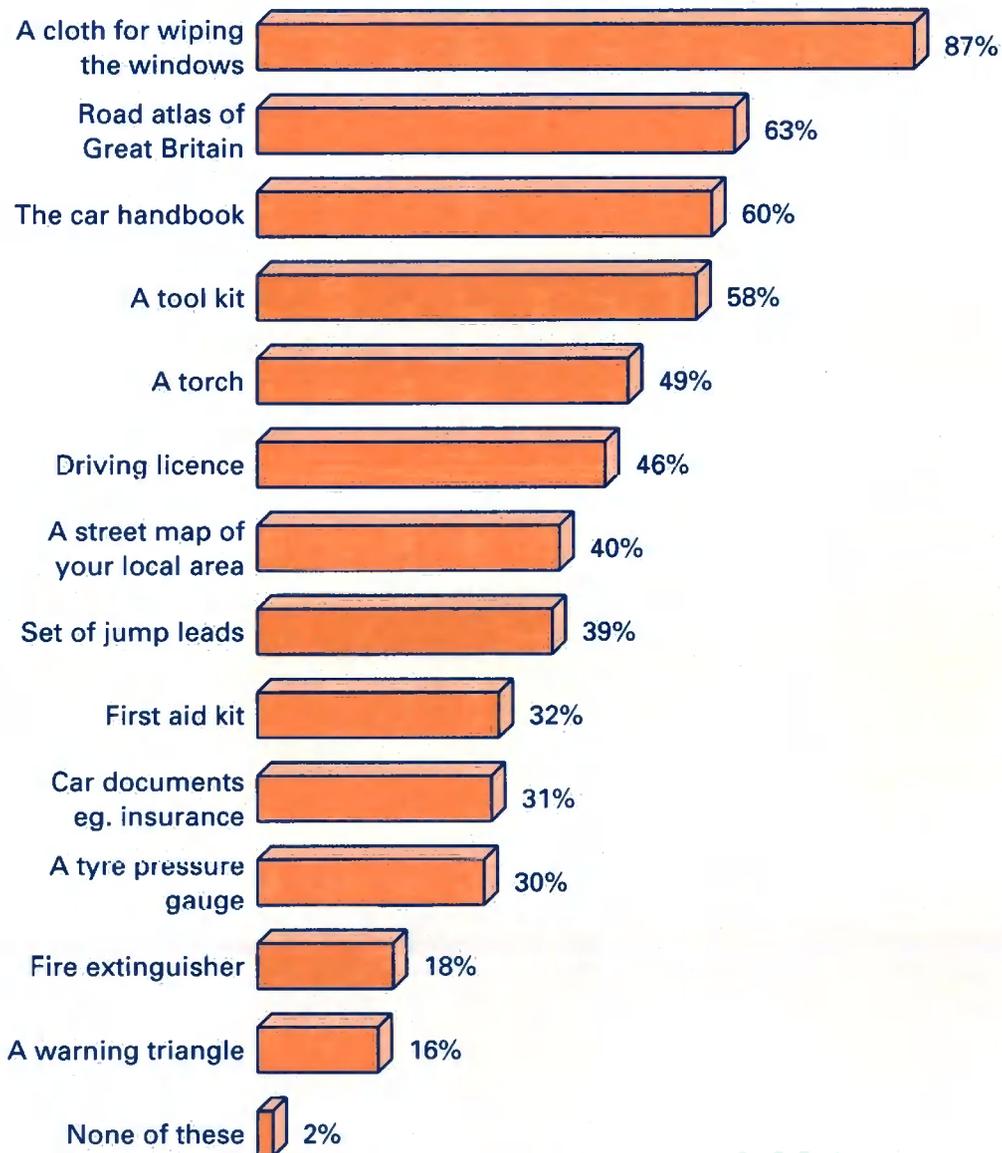
Thirty per cent carry a tyre pressure gauge with them, rising to 38% of men, and this also seems to rise with age - 20% of 17-34 year olds normally carry a tyre pressure gauge, rising to 53% of those aged 65 and over.

A fire extinguisher is normally carried by 18% of drivers, around 4.5 million, including 20% of men but only 14% of women, and this does not seem to depend upon the number of miles driven.

Finally, a warning triangle to place on the road in case of break down is carried by just one driver in six (16%) or around 4 million drivers. Again, this item is more likely to be carried by men (19%) than women (14%), by those aged over 55 (21%) more than younger drivers (eg 17-34 year olds) - 11%. Drivers in London have a particularly high propensity to carry a warning triangle (25%)

Items People Have in the Car

Q Which of these would you normally have in the car when you are driving?



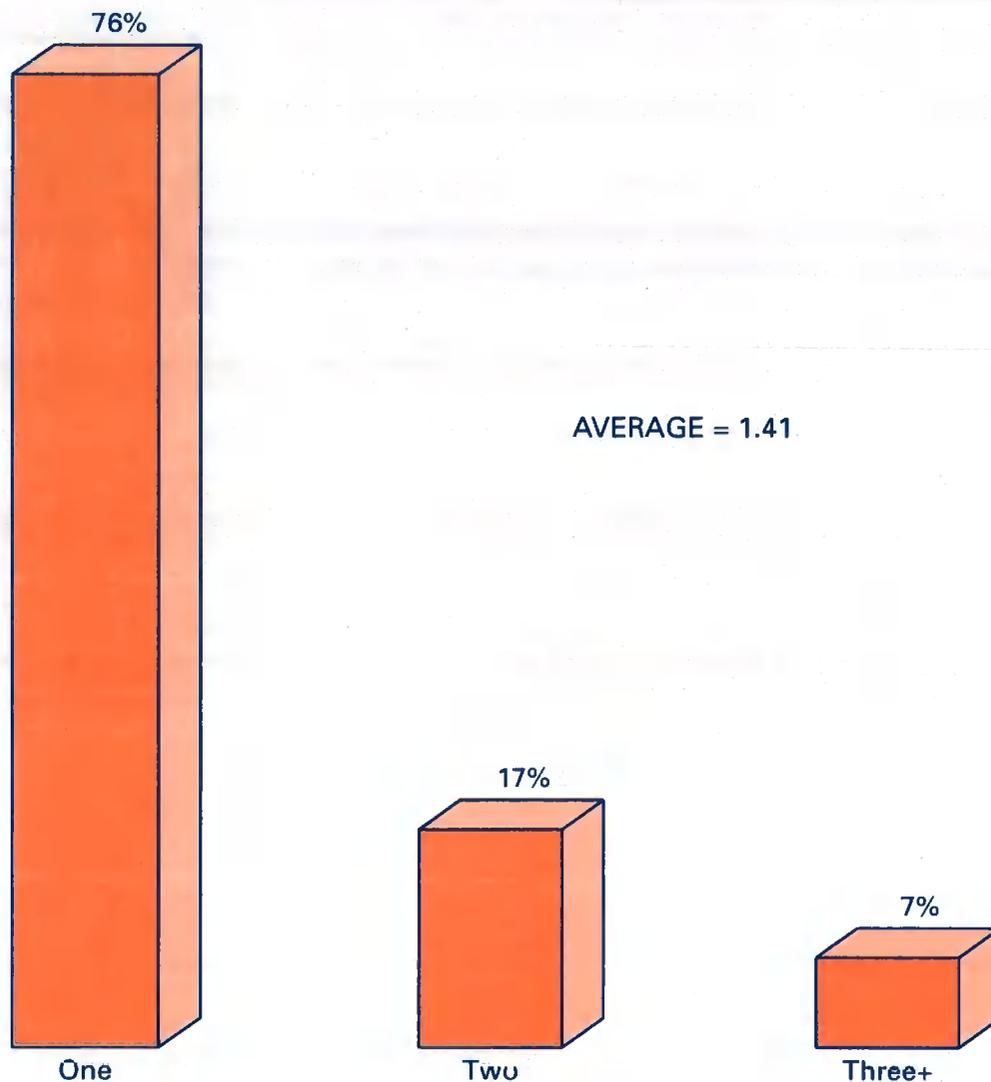
Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

CONTINENTAL TRAVEL

Just 9% of drivers, or 2.3 million, have taken their car on the Continent in the last year, mostly just once. This would gross up to a total number of visits of around 3.2 million. This is closely in line with the number of cross-channel trips by ferry which is 2.9 million a year.

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



Base: All those who have taken their car on the continent in the last year (182)

Source: Lex Report on Motoring 1993. The Consumer View/MORI

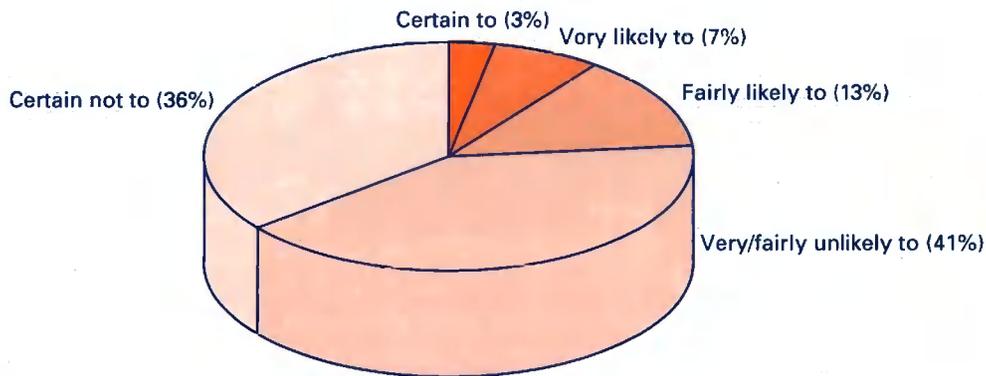
THE CHANNEL TUNNEL

If the Channel Tunnel were to open today just 3% say they would be 'certain' to use it in the next year or so, while a further 20% would be very likely (7%) or fairly likely (13%) to do so. This represents a decline on the 1991 survey and, indeed, represents the lowest level of commitment to using the Tunnel recorded in any of the five annual Lex Surveys.

Those who say they would be certain to travel indicate a willingness to make an average of 1.5 journeys per year - markedly down on previous years. This would gross up to around 1.4 million return journeys per year, although is based on a fairly small sample of respondents.

Only half of those who have taken their car on the Continent in the last year say they would be likely to use the Tunnel within the next year if it was open today, and only 9% said they would have been certain to. However, this does not necessarily mean they would have used an alternative means of crossing - they may not have travelled with their car at all.

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



Base: All drivers (2,011)

Trends

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

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

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

Base: Certain to travel (72)

ATTITUDES TO THE CAR AND DRIVING

DEPENDENCE ON THE CAR

Four out of five (81%) claim that they would 'find it very difficult to adjust my lifestyle to being without a car' and, if anything, the trend away from this view recorded in the Lex Surveys from 1988 to 1991 has reversed. Men and women are equally likely to hold this view but young drivers (those aged 17-24) were the least likely of any age group to be so dependent on the car, although still 69% said they would find it difficult to adjust to being without one. People living in London and Scotland were also less dependent on the car than drivers elsewhere although not as much as last year. As one might expect, those who use their cars most frequently and those who drive the greatest number of miles, particularly company car drivers, were most likely to say that they would find it difficult to adjust their lifestyle to being without a car.

Effect of loss of car

The biggest trauma, of being without a car it seems, would come from the loss of a general sense of freedom which comes from having your own transport; 72% selected this from a list as among those things which would be seriously disrupted if they did not have a car available to them. Eighty per cent of those who regarded the car as 'an extension of themselves' and 81% of those who saw their car as an extension of their home or office would feel the loss of freedom reflecting the intense psychological involvement drivers can have with their cars.

Disruption to shopping was identified by 55% of drivers, including 62% of women and 63% of those aged 65+. The frequency of seeing family and friends was identified by 50% of drivers including 63% of those aged 65+.

Sixty-four percent of those at work said getting to and from work would be seriously disrupted including 80% of those who regard the car as 'essential for work'. Forty per cent of those at work felt their ability to carry out their work effectively would be seriously disrupted by being without a car.

Disruption of drivers' social lives was a particular concern of the young and males; 43% overall selected this item, but 46% of men and 39% of women, 60% of 17-24 year olds and 74% of young, single males. Those who saw the car as an extension of themselves also particularly felt this aspect of disruption (69%).

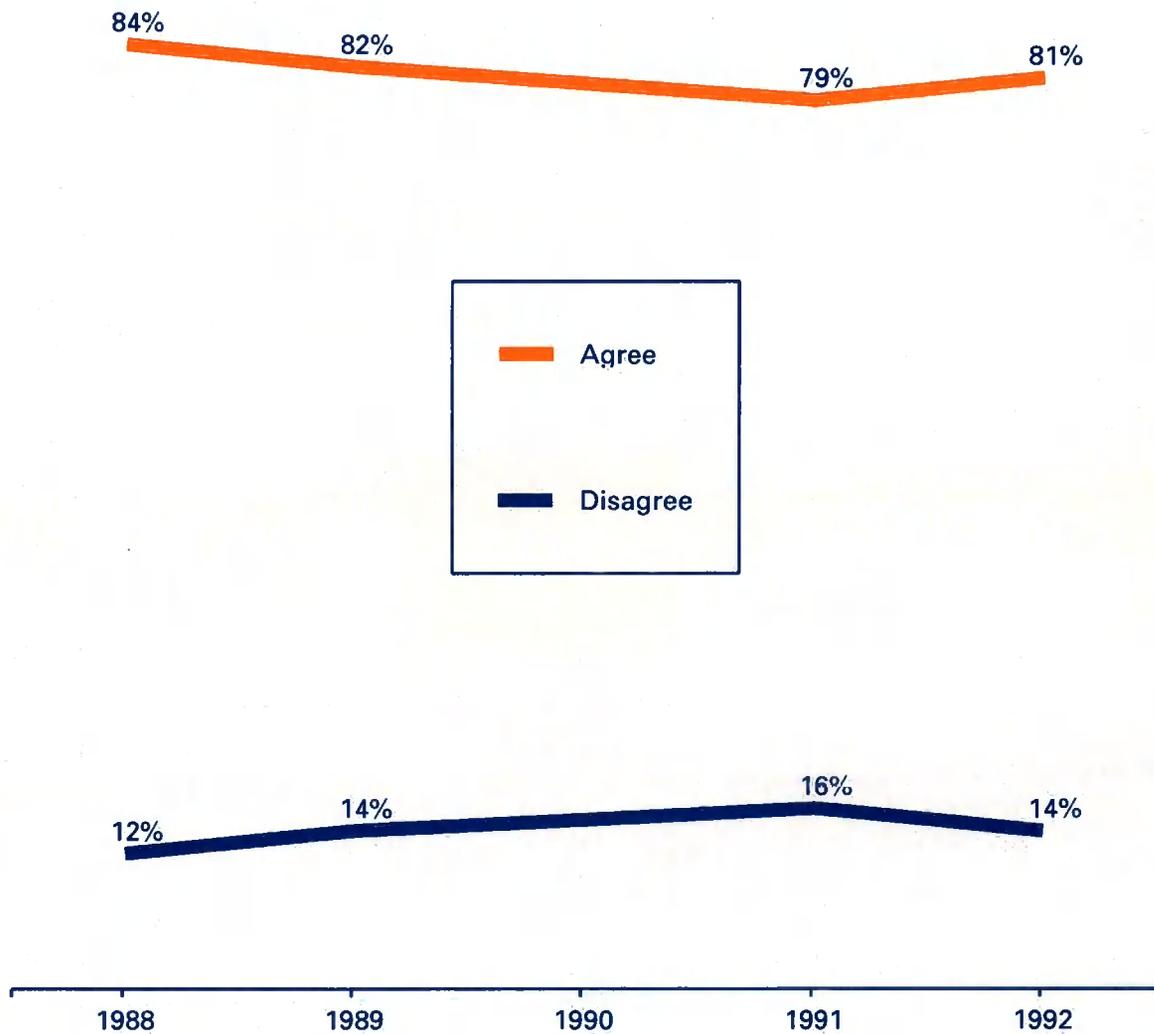
One in three (32%) would expect a major impact on sports, hobbies and leisure activities, particularly, again, men (35% compared with 28% of women), and younger drivers (42% of 17-24 year olds) and also those in Wales and the South West (39%).

Women were more conscious of the impact on their family commitments such as taking children to and from school (39% chose this compared with 24% of men) and 55% of those with children in the household were concerned about this aspect.



Dependence on the Car

“I would find it very difficult to adjust my lifestyle to being without a car”



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



1993 LEX REPORT ON MOTORING – The Consumer View

Dependence on the Car

Q Which of these would be seriously disrupted for you if you did not have a car available in your household?



Base: All drivers (2,011)

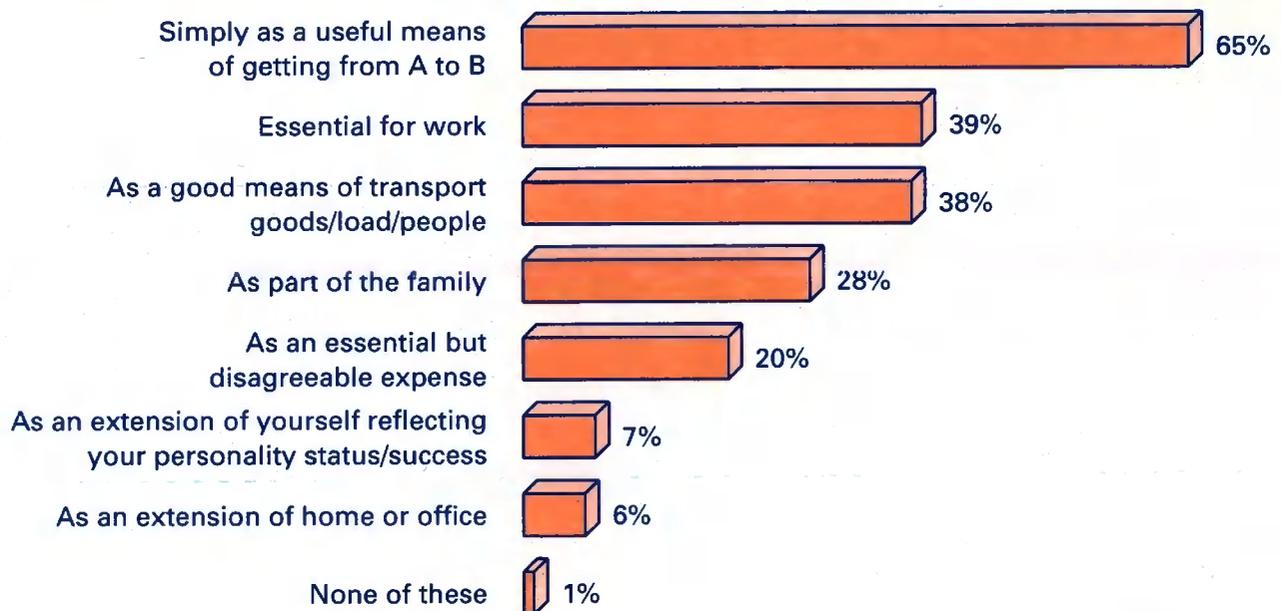
Source: Lex Report on Motoring 1993, The Consumer View/MORI

THE ROLE OF THE CAR

Despite the high proportion of drivers who claim they would find it very difficult to adjust to being without a car, that was not reflected in the 65% saying they regard the car they drive most often as 'simply a useful means of getting from A to B'. This was particularly true of those aged over 55 (76%) and those driving older cars (68% of those with cars over six years old and 60% of those with cars up to three years old). Drivers working full or part-time were generally less likely to hold this view (58%) and over half - 55% - considered the car 'essential for work'.

Four out of ten (39%) regarded it as a means of transporting goods - heavy or bulky loads or, indeed, people - particularly those aged 25-54 (42%). Three in ten (28%) said they regarded the car as 'part of the family' particularly those with children in the household (37%). One person in fourteen (7%) went as far as to describe it as 'an extension of themselves reflecting their personality, status or success' and this tended to be particularly high for those aged 17-34 (10%), those with cars less than three years old (10%) and those with company cars (13%). For those whose employer had provided their car it was also more likely than average to be regarded as 'an extension of home or office' (25% compared with 6% overall).

Q Which of these, if any, describe the ways you regard the car you drive most often?



Base: All drivers (2,011)

ATTITUDES TO PUBLIC TRANSPORT

The trend towards a great propensity to switch travel to public transport shown in the Lex Surveys from 1988 to 1990 appears now to be receding. Now 35% agree with the view that 'I would use my car less if public transport were better', and 56% disagree - a 3% swing towards disagreement since 1990.

Drivers in London were most inclined to agree with this statement and, as last year, it was the only region where more drivers agreed (49%) than disagreed (40%). Drivers in Scotland were least likely to agree and, indeed more than twice as many disagreed (66%) as agreed (28%). This year there seemed no marked differences in attitude according to the age of the driver.

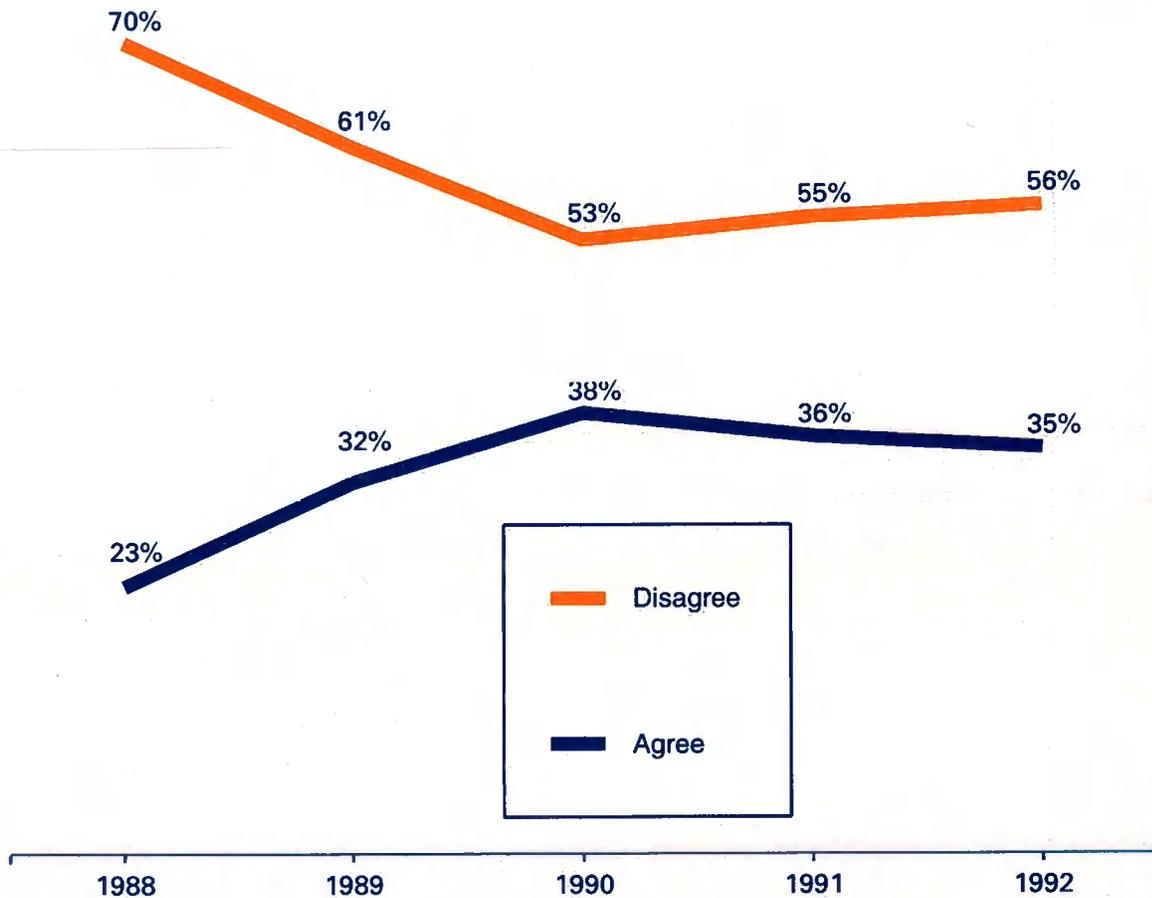
Drivers of company cars were markedly less likely to consider switching (25%) than drivers of privately owned cars (36%) although those in full or part-time work did not differ significantly in their views from those not working.

Privatisation of the railways seems unlikely to make a major impact on driving habits. Only one in eight drivers (12%) took the view that "if the railways were run by private companies I would be more likely to use them instead of my car"; 70% disagreed.



Attitudes to Public Transport

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



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



CAR PURCHASING

Forty-four per cent of drivers have bought a car in the last two years with the balance between new and second hand cars at 22% new and 78% second hand. In 1990 28% of those buying a car in the previous two years had bought a new car. Assuming motorists' recall is reasonably accurate (although accurate recall of date of purchase can be somewhat variable) and assuming each person bought only one car in that period, these figures would gross up to around 5.5 million cars bought per year, consisting of 1.2 million new cars and 4.3 million second hand. This would, of course, exclude cars bought by companies for their employees.

Men are more likely to have bought cars than women - 53% compared with 34% - although the cars they bought are slightly more likely to be second hand (76%) than the cars bought by women (76%).

Car purchases also tend to be with young drivers - those aged 17-24 being most likely to have bought a car in the last two years (51%), declining to 45% of those aged 25-64 and 36% of those aged 65 or over. However, older people are much more likely to have bought new cars than young drivers. While a third (36%) of car buyers aged 55+ have bought new this declines to 11% of 17-24 year old buyers. Older buyers have also been increasing their propensity to buy cars over the last few years.

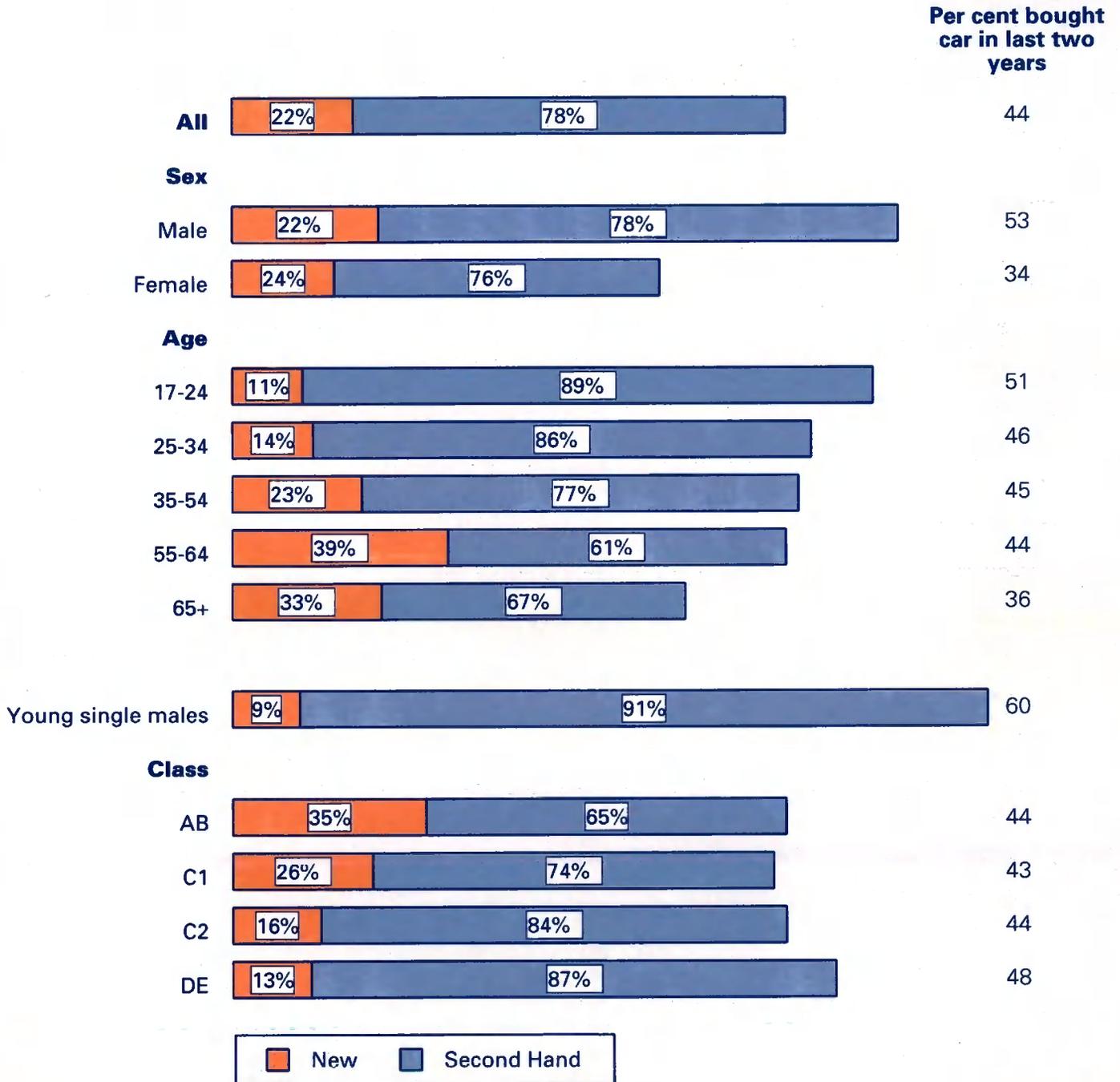
Car buying is not particularly correlated with social class although new car buying is. While 35% of AB (upper managerial and professional) car buyers bought new cars this declined to 26% of C1 (white collar) buyers and 15% of C2DE (Semi and un-skilled manual) buyers.

Four out of ten (40%) of new car buyers in the last two years were aged 55 and over, slightly fewer (37%) were aged 35 to 54 and around a quarter were aged under 35. The picture is very different for second hand cars, where 20% of purchasers are aged 55 and over, 36% are aged 35 to 54 and 44% are aged under 35.

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Car Purchasing

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



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

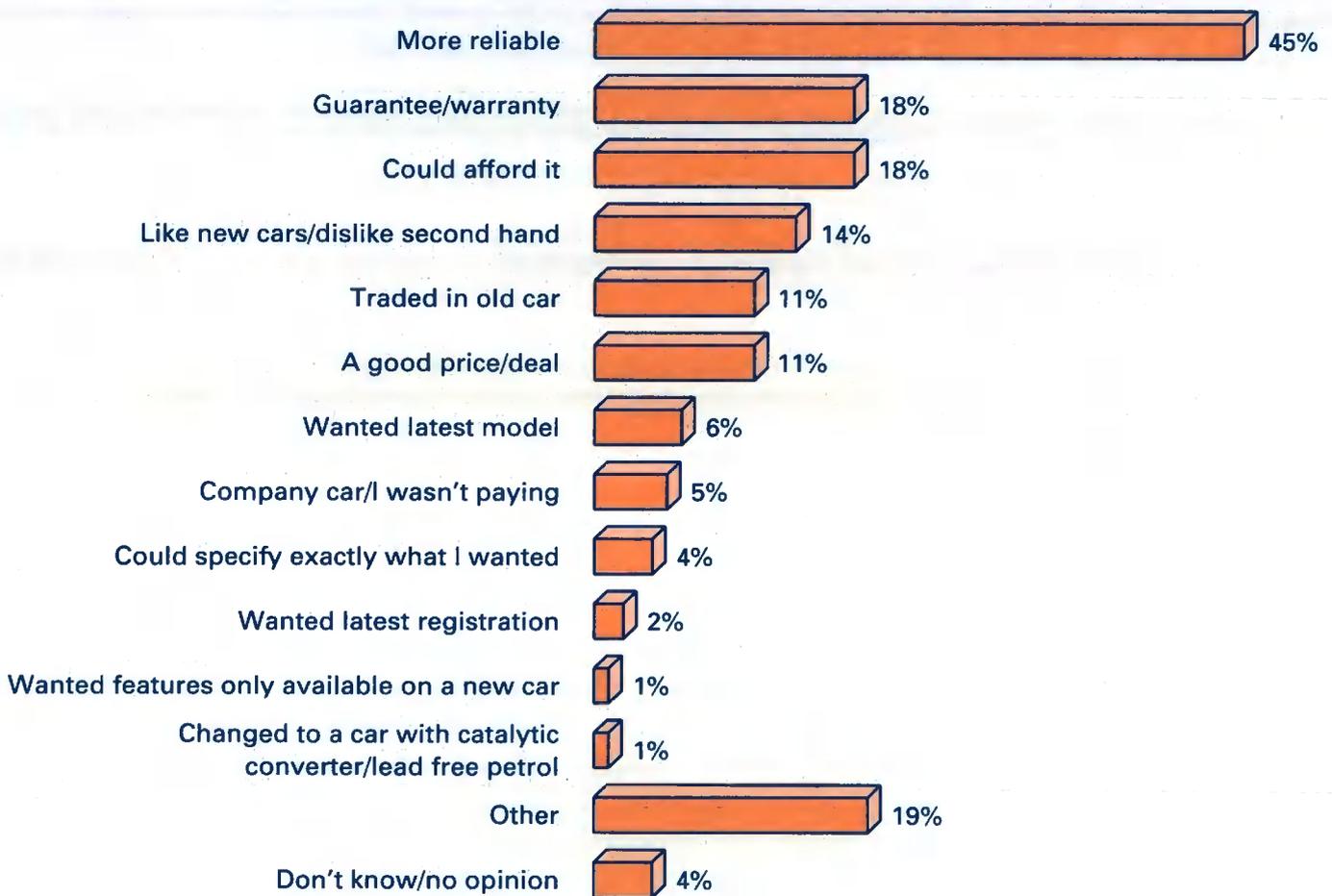


REASONS FOR BUYING NEW VS USED CAR

Reliability is clearly the main reason for buying a new rather than second car, as it was in 1990; forty-five per cent of those responsible for buying a new car in the last two years said this was the main reason and among women it rose to 56%.

A range of other factors were mentioned by rather fewer respondents. In particular these included the guarantee/warranty (18%), could afford to buy a new car (18%), a general liking of new cars or disliking of second hand cars (14%), the fact that they could trade in their old car (11%) and have been able to get a good price or good deal (11%).

Q What made you buy a new rather than second hand car?

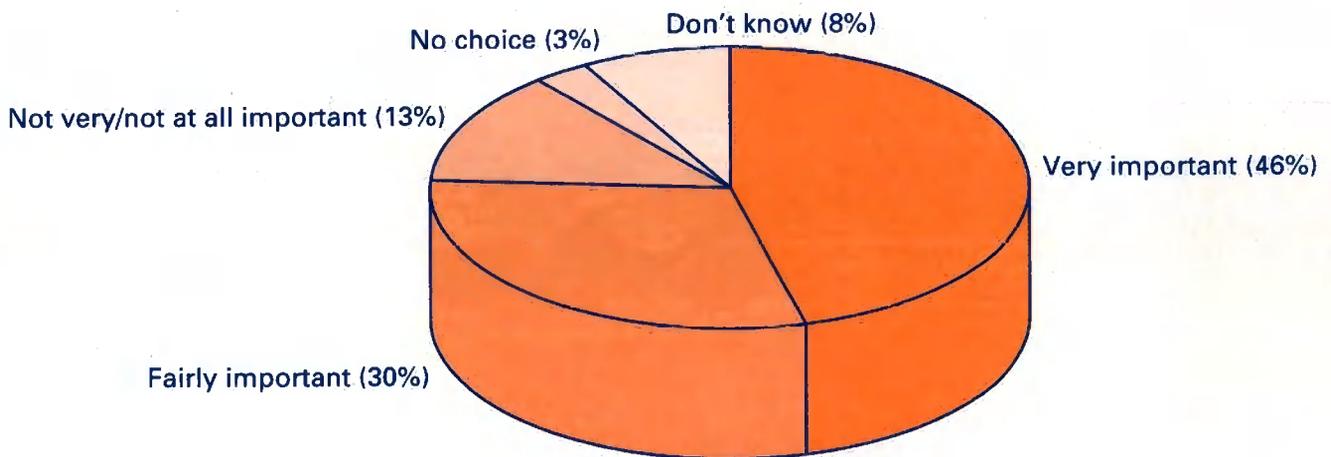


Base: All bought new car in last two years (210)

IMPORTANCE OF NEW CAR FOR NEW CAR PURCHASERS

Only 46% of those who bought a new car said it was very important that it should be a new car and this did not seem to vary according to whether the respondent was a private buyer or buying on behalf of his or her company. Importance did, however, increase with age with those over 55 particularly likely to consider important the car being new (53% very important) while those aged under 35 are less likely to take this view (38%).

Q When you bought the car you use most often, how important was it to buy a new car?



Base: All who bought car used most often from new (762)

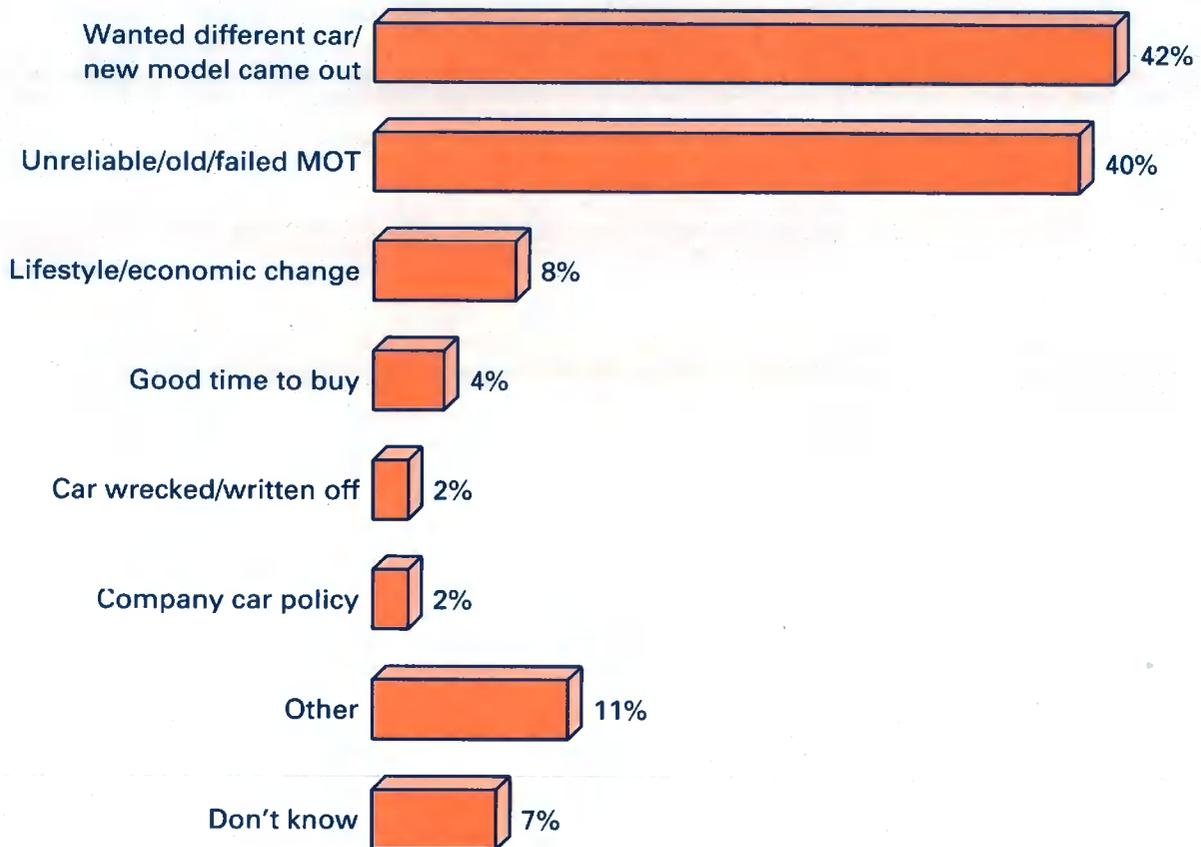
REASONS FOR CHANGE OF CAR

Four out of five drivers claim the car they drive most often replaced another car. Most of these cars would have been sold or perhaps passed on to another member of the household (75%) although 7% of cars were scrapped.

The main reasons for replacing the car seems to have been the wish to have a different car; 42% of drivers gave this as the reason. The car just becoming unreliable, too old or failing its MOT was nominated by 40%. Eight per cent referred to lifestyle changes and 4% referred, somewhat opportunistically, to being 'a good time to buy'. A further 2% suggested the car had been written off in an accident and an equal proportion were accounted for by company car policy changes.

Reasons did not vary much according to whether the cars were bought new or second hand.

Q What is the main reason you decided to change your car (at this time)?



Base: All who replaced a car (1,593)

CAR PURCHASE COST

On average the cars driven most often by respondents cost £4,700. New cars cost on average £9,100, or £13,100 if bought by a company, while second hand cars cost an average of £3,200.

The average price paid increases with the age of the driver peaking at £5,700 for drivers aged 55-64, although even drivers aged 65+ were driving cars which cost on average of £5,300 - more than for any group aged less than 55.

In terms of value, 40% of drivers of new cars would expect to pay more (or have their company pay more) than was paid for their current car, if it was replaced; 42% would expect to pay about the same amount, 18% less.

A similar proportion emerges for second hand cars: 36% would expect to pay more, 44% the same and 20% less.

On average new car buyers would expect to pay £10,300 for a new car to replace one costing £9,100 (ie 12% more) and second hand car buyers would pay an average £4,500 to replace a car costing £3,200 (ie 40% more).

	Cost of Purchase	
Average		£
	All	4,700
	New	9,100
	Second hand	3,200
Car bought privately		
	New	8,200
	Second hand	3,100
Company car households		
	New	13,100
	Second hand	5,900
Age of driver		
	17-24	3,000
	25-34	4,200
	35-54	5,000
	55-64	5,700
	65+	5,300

Propensity to Pay more/less to replace car (Don't knows excluded)

Car Driven most often Bought...	New	Second Hand
	(385)	(1089)
To replace it, would pay...	%	%
Less	18	20
Same	42	44
More	40	36



PART EXCHANGE

Two out of three car buyers traded their old cars when buying their next car, though this proportion was higher if the next car was bought new (77%) rather than second hand (63%). Women were as likely as men to part exchange. Differences between the type of dealers were not generally statistically significant, the bases being very small.

The vast majority (85%) of those who part exchanged got the price they wanted for their old car, although those who part exchanged for a new car were generally more likely to be happy with the price they got (91%) than those who part exchanged for a second hand car (82%).

Q Did you part exchange the car?

	All part (515) %	New (202) %	Second Hand (310) %
Part exchange	69	80	64
Not part exchange	31	20	36

Base: Bought new or second hand car from a dealer (580)

Q Did you get the price you wanted in part exchange or not?

	All part (374) %	New (162) %	Second Hand (210) %
Got price wanted	87	91	82
Did not get price wanted	13	8	16

Base: All who part exchanged old car through dealer (374)



NEXT CAR PURCHASE

Of total cars bought new, 73% are expected to be replaced by new cars, 13% by second hand cars and 7% are not expected to be replaced at all. This represents a shift towards preferring to replace new cars with new since the last survey. The remaining drivers have no opinion. Of cars bought second hand, 79% are expected to be replaced by second hand cars, 7% by new cars, although 7% will not be replaced at all. Clearly this will be offset to some extent by new buyers entering the market for the first time who are likely to be younger drivers with a preference for second hand cars.

The propensity to buy a new car is significantly higher among those aged 35 to 64 (around 29%) than those aged under 35 (23%) and those aged over 65 (26%). This latter group has a particular high propensity to say they will not buy another car - 25% - and these are also the group most likely to reduce the number of cars in their household.

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

Present car bought...	New (1,006)	Second hand (1,355)
Next car...	%	%
New	73	7
Second Hand	13	79
Will not be replaced	7	7
No opinion	8	7

Base: All drivers (2,011)



SOURCE OF PURCHASE

Nearly nine out of ten (87%) new car purchasers bought their car from a franchise dealer selling only their own make of car, while 10% bought from a dealer selling more than one make. This represents a significant switch towards single franchise dealers since last year.

Just over one in five second hand car purchases were private deals with a stranger (22%) and slightly fewer (20%) were from a second hand car dealer. Friends or relatives accounted for another 16%. Franchise dealers account for 20% while non-franchise dealers selling second hand cars account for 14%. These figures suggest a marked switch away from private deals in the last year towards the car trade.

Assuming reasonably accurate recall of date of purchase and that purchases were equally divided between the two previous years and that only one purchase was made by each individual who purchased a car in the last two years, then this suggests a total number of cars bought last year of 5.5 million. 1.2 million were new cars bought from a franchise dealer and rather under a million - 0.9 million - were second hand cars from a franchise dealer. Second hand car dealers accounted for 0.9 million and private deals with strangers 1.0 million.

Those who have older second hand cars are markedly more likely to have bought via a private deal (33%) and a little more likely to have bought from a second hand car dealer (24%) or a friend or relative (21%). Indeed, 59% of private deals have been for cars which, at the time of interview, were over 6 years old compared with 38% of all second hand cars. Second hand cars aged up to 3 years old are highly likely to have been bought from a franchise dealer for that make of car (29%); some 44% of second hand cars bought from franchise dealers for a particular make of car were 3 years old or less at the time of interview.

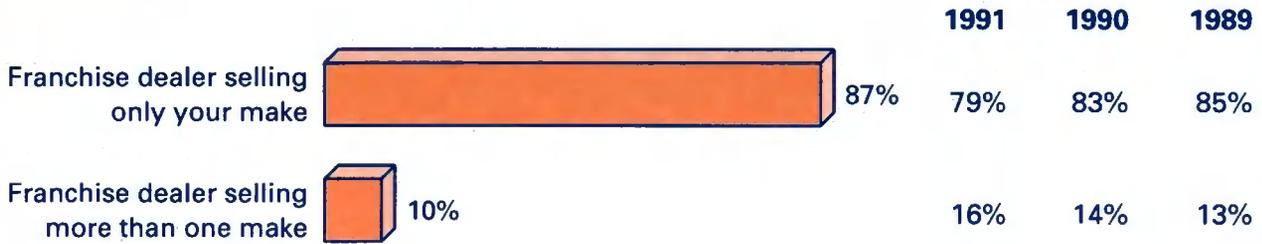


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Source of Purchase

New cars

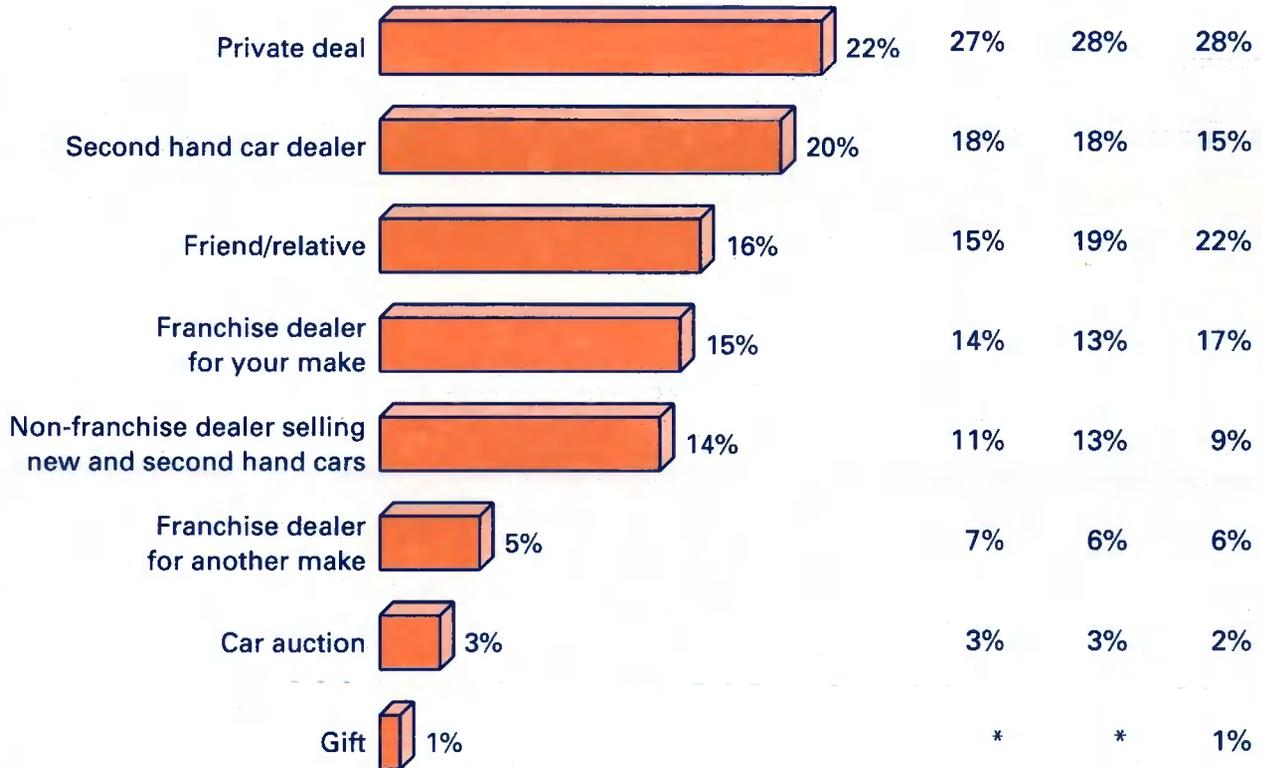
Q Which of these did you buy your car from?



Base: Bought new car in last 2 years (210)
Don't knows excluded

Used Cars

Q Which of these did you buy your car from?



Base: Bought second hand car in last 2 years (649)
Don't knows excluded

Source: Lex Report on Motoring 1993, The Consumer View/MORI



Source of Purchase

Grossed up Figures

Annual
Average
Over
Last 2
years

Total cars bought

5.5m

New Cars

Q Which of these did you buy car from?

Franchise dealer selling
only your make

1.1m

Franchise dealer selling
more than one make

0.1m

1.2m

Used Cars

Q Which of these did you buy your car from?

Private deal

0.1m

Second hand car dealer

0.9m

Friend/relative

0.7m

Franchise dealer for your
make

0.7m

Non-franchise dealer selling
new and second hand cars

0.6m

Franchise dealer for
another make

0.2m

Car auction

0.1m

Gift

0.1m

Any franchise

0.9m

4.3m

NB This excludes cars bought by companies for their employees



1993 LEX REPORT ON MOTORING – The Consumer View

Source of Purchase—used cars by age of car

Base	All (649) %	Up to 3 years (177) %	3-6 years (236) %	Over 6 years (227) %
Private deal	22	10 (11)	16 (30)	33 (59)
Second hand car dealer	20	15 (17)	19 (38)	24 (45)
Friend/relative	16	10 (14)	15 (37)	21 (49)
Franchise dealer for your make	15	29 (44)	17 (43)	5 (13)
Non-franchise dealer selling new and second hand cars	14	18 (31)	18 (49)	7 (19)
Franchise dealer for another make	5	8 (34)	6 (43)	3 (23)
Car auction	3	3 (24)	3 (41)	2 (35)
Gift	1	* (5)	1 (38)	2 (57)

Figures in brackets row percentage

Source: Lex Report on Motoring 1993, The Consumer View/MORI



SOURCE OF FINANCE

Around half (47%) of those who have bought a car in the last two years have paid cash although this tended to be slightly higher for those who bought their car second hand. It was particularly low for those buying a company car. Finance company loans were the second most common form of finance - 19% - and particularly favoured by those who bought their car from new car franchise dealers. Bank loans were used by 12% and hire purchase by 7%. Both of these forms of finance were markedly down on last year.

Those who bought a car through a dealer and used a finance company, HP or finance leasing were overwhelmingly likely to have arranged this through the dealer; 87% said this was the case overall, including 90% of new car purchasers who financed in this way and 83% of second hand car purchases.

The few who did not use a dealer either preferred to make their own arrangements or felt the dealers' interest rates were too high.

Comparison with previous years shows a shift away from cash towards finance company loans particularly among second hand car buyers.

Second hand car buyers have increased their propensity to use finance company loans each year since 1989 now standing at 17%. Although cash remains the preferred form of finance for second hand car buyers this has declined from 65% in 1989 to 51% in 1992.

Finance company loans are also a markedly more important source of finance for new cars now (24%) than in 1989 (14%).

	All				Bought New				Bought second hand			
	'89	'90	'91	'92	'89	'90	'91	'92	'89	'90	'91	'92
Cash/loans from family	57	44	45	47	45	47	42	42	65	46	46	51
Finance Co loan/(+ cash)	9	15	16	19	14	20	16	24	6	11	15	17
Bank loan (+ cash)	16	12	15	12	10	8	12	9	20	15	18	14
Hire purchase/(+ cash)	5	11	11	7	7	15	15	10	4	7	8	5
Building Society loan/(+ cash)	-	1	3	3	-	2	0	1	-	1	5	3
Contract hire/full service leasing	3	1	2	2	7	2	3	3	*	0	*	1
Finance leasing	3	3	1	2	7	5	2	3	*	1	1	1
Other	4	3	3	4	4	3	4	7	2	2	3	3
Don't know/refused	4	10	4	5	6	4	5	2	2	15	4	7

Source of Finance

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

	Car driven most often			Car bought second hand		Ownership			
		Bought New	Bought Second hand	Franchise dealer	Non-franchise dealer	Private	Company	Part-exchange	Not part-exchange
	All (580) %	(241) %	(337) %	(150) %	(220) %	(418) %	(149) %	(374) %	(197) %
Cash/loan from family member	47	42	51	53	48	49	36	45	54
Finance co. loan/(+ cash)	19	24	17	12	16	20	13	23	11
Bank loan/(+ cash)	12	9	14	12	5	13	7	12	14
Hire purchase/(+ cash)	7	10	5	15	17	6	8	8	5
Building Society loan/(+ cash)	3	1	3	8	5	3	1	2	4
Contract hire/full service leasing	2	3	1	1	*	1	5	1	4
Finance leasing	2	3	1	*	1	1	7	1	2
Other	4	7	3	2	3	4	12	4	5
Don't know/refused	5	2	7	7	5	4	12	4	4

Base: All responsible for buying new car or second hand car at dealer (580) Source: Lex Report on Motoring 1993/MORI



PURCHASING TIME SCALE

In order to examine the delays in the car purchasing process we asked buyers of new and second hand cars firstly about the length of time from when they **started looking** for a car to the time they drove it away, then about the time from when they agreed to buy a **specific car** to the time they drove it away.

One third of new car buyers and 41% of second hand car buyers claim that they were able to drive away the car they bought from the dealer within a week of starting to look for a car to buy. In one case in twenty the car was driven away immediately. However 22% of new car buyers and 20% of second hand car buyers waited for over a month before they drove their car away.

Having agreed to buy a specific car, 17% said they were able to drive it away immediately, although the figure was slightly higher for second hand than new car buyers - 20% and 13% respectively. Most of the rest (56%) had to wait up to a week though this time second hand buyers had to wait longer than new buyers (60% and 49% respectively). Around one in fourteen (7%) of new car buyers had to wait at least a month before they could drive their car away, this was true of only 2% of those buying second hand from a dealer.

The main reason for the delay between the time a buyer agreed to buy the car to the time they drove it away was the dealer needed time to get the car ready; this was true for 42% of all buyers (29% of new car buyers and 50% of those who bought second hand). Arranging finance was the reason for delay in 25% of cases, though this ranged from 16% of new car buyers up to 31% of second hand car buyers. Availability of the car was the reason for delay in 13% of cases but, understandably, was much more of a reason for new car buyers (29%) than second hand (4%).

12% of new car buyers waited for the new registration letter.

In nine out of ten cases, if finance was the reason for the delay, this was sorted out within a week. Availability of the car was likely to cause the longest delay with 54% of those mentioning this as a cause of delay waiting over a week before driving their car away.

Purchasing Time Scale

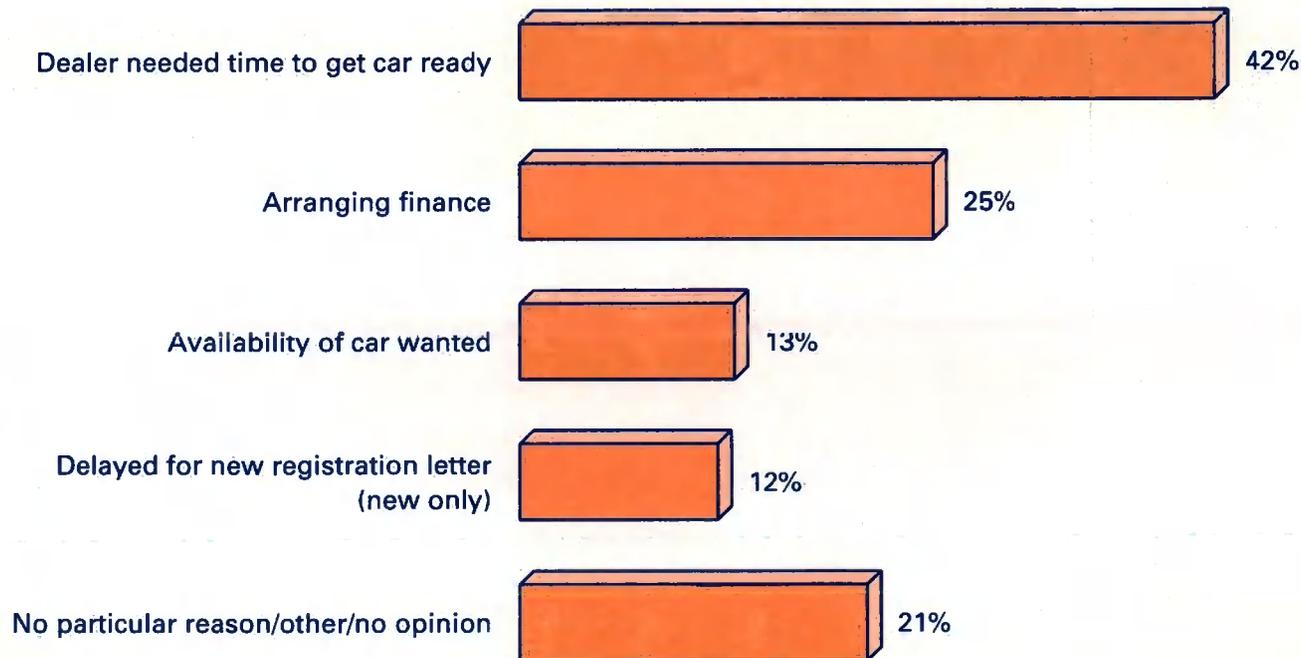
Q How long did it take from the time you . . .

- a) started looking for a car to the time you drove it away?
- b) agreed to buy the specific car to the time you drove it away?



Base: All bought car in last two years (580)

Q What was the main reason for the delay between agreeing to buy the specific car and driving the car away?



Base: All bought car in last two years, and had to wait after agreeing to buy it (461)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

NUMBER OF DEALERS VISITED

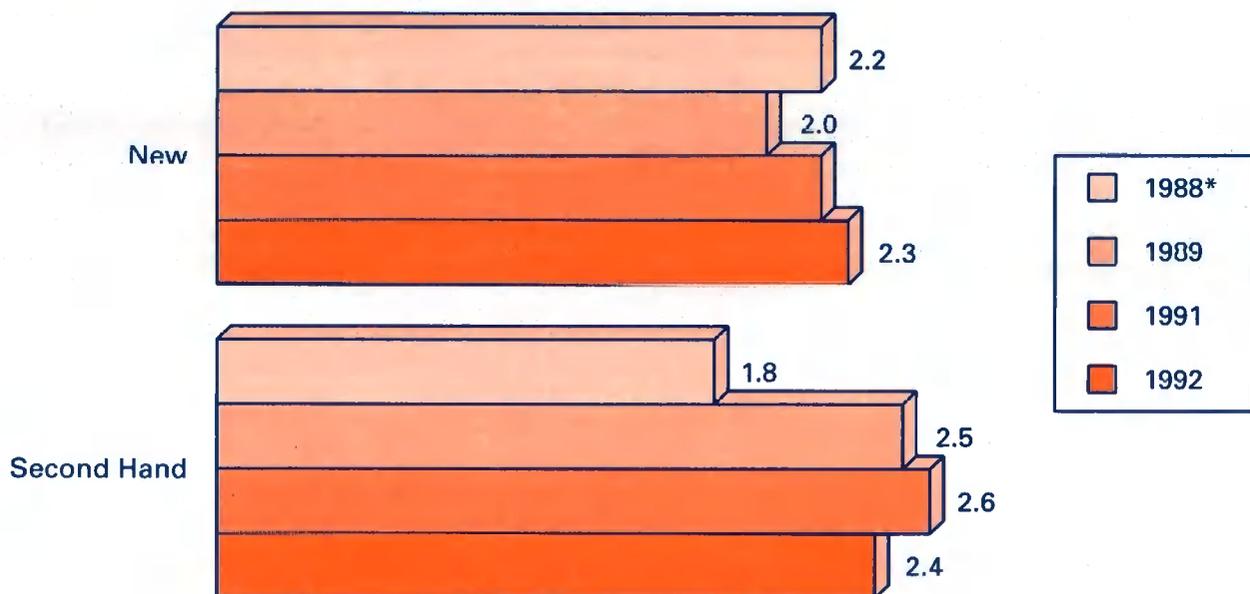
On average both new car and those second hand car buyers who bought from a dealer visited around 2.4 dealers before deciding where to buy their car, although a small proportion visited no dealers at all before making their decision - 6% of new car buyers and 11% of second hand car buyers.

The trends suggest little change in the habits of new car buyers although second hand cars buyers seem to be visiting more dealers now than four years ago.

Most drivers test drive the car before they buy it at, on average, around 1.1 dealers, although 34% of new car buyers and 27% of second hand car buyers do not test drive the car from any dealer.

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

Average number of dealers visited



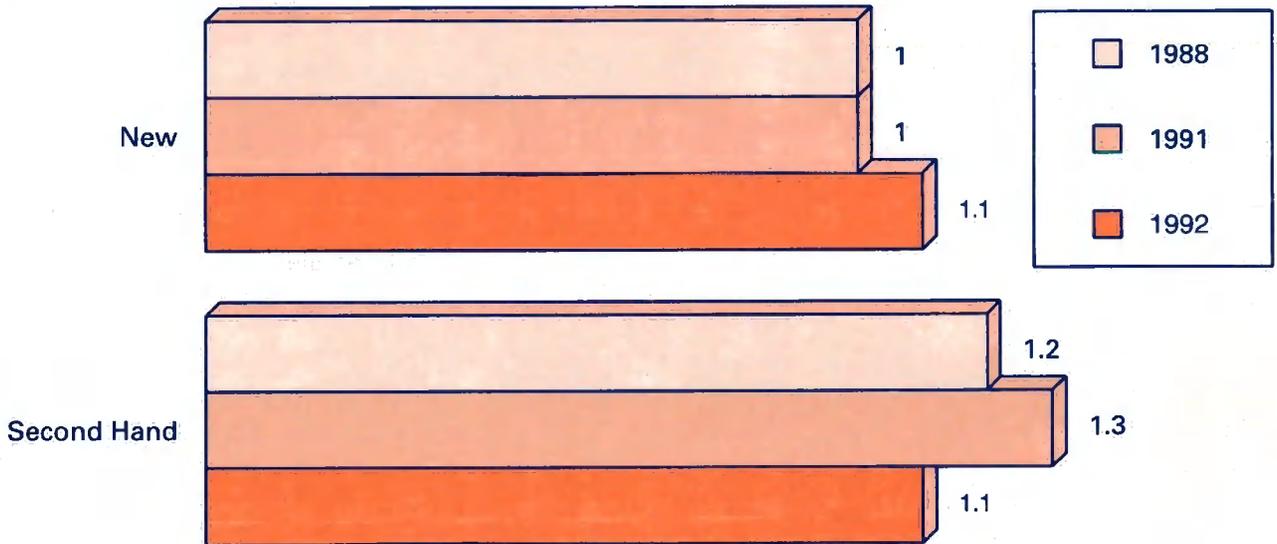
Base: All responsible for buying car from dealer in last 2 years (580)

* NB. 1988 figures based on those who bought a car in the last five years

Number of Test Drives

Q At how many dealerships, if any, did you have a test drive?

Average



Base: All visiting one or more dealers (510)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



IMPORTANT ASPECTS IN CAR PURCHASING

Recent car buyers (purchasers in the last two years) were asked to recall features (from a list) which were particularly important to them when they made their purchase, and were then asked which features would be important the next time they buy a car.

Of the features asked about, price was felt to be particularly important by the greatest proportions of both new and second hand recent car buyers; this was the top considered feature for both the last car purchase and the next car purchase for both groups.

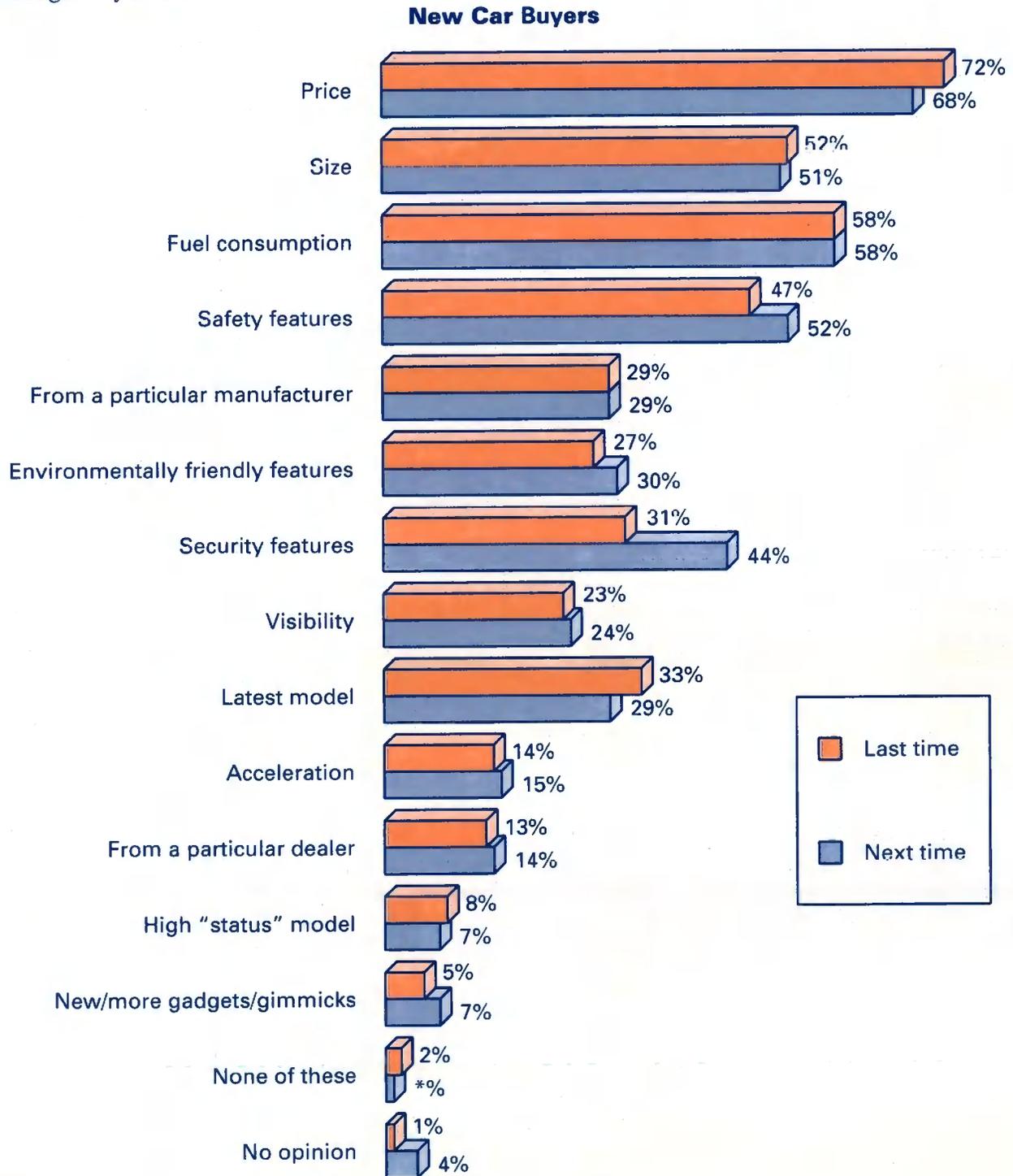
Fuel consumption, size and safety features are other commonly nominated considerations; five or six in ten feel there were important last time they bought a car, and a similar proportion feel they will be important next time they buy a car.

Younger drivers (17-24) feel price and fuel consumption were particularly important considerations in their recent purchase (87% in both cases), and indeed all younger drivers feel these features will be important next time they purchase. Female purchasers are slightly more inclined than men to think safety features important (52% compared to 48% for the recent purchase, 59% compared to 49% for the next car purchase).

Security features were thought important to a greater proportion of drivers when considering their next car purchase (34%) than considered them important when making their last car purchase (13%). Some 46% believe that safety features will be of concern for their next car purchase although only 31% said they were for their last car purchase. Likewise, but to a lesser extent, a greater proportion believe that safety features will be of greater concern for their next car purchase than they were important for their last car.

Important Aspects Considered in Car Purchasing

Q Which of the following features were/will be particularly important to you last/next time you bought/buy a car?

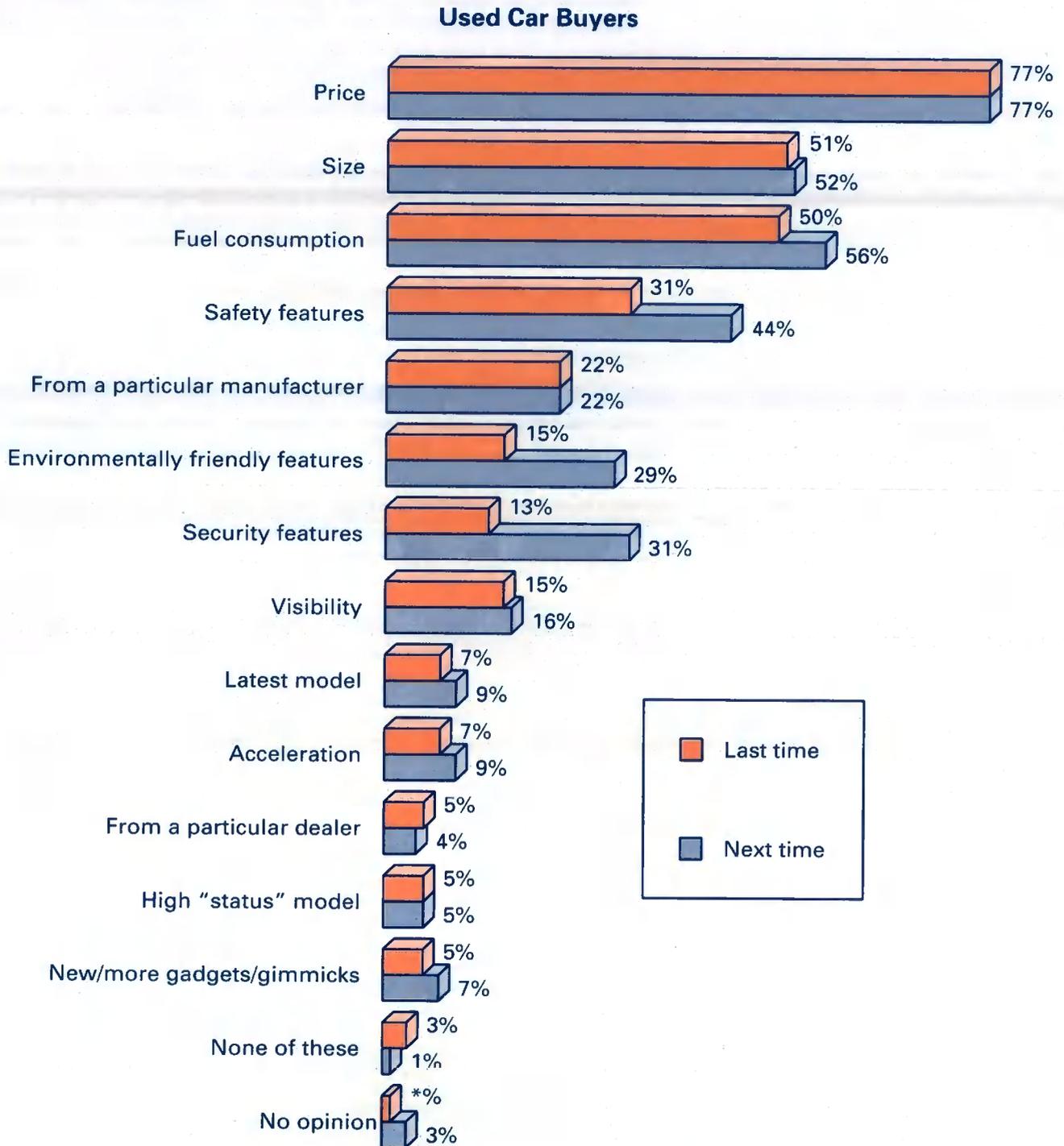


Base: All who bought new car in last two years (277)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

Important Aspects Considered in Car Purchasing

Q Which of the following features were/will be particularly important to you last/next time you bought/buy a car?



Base: All who bought second hand car in last two years (585)

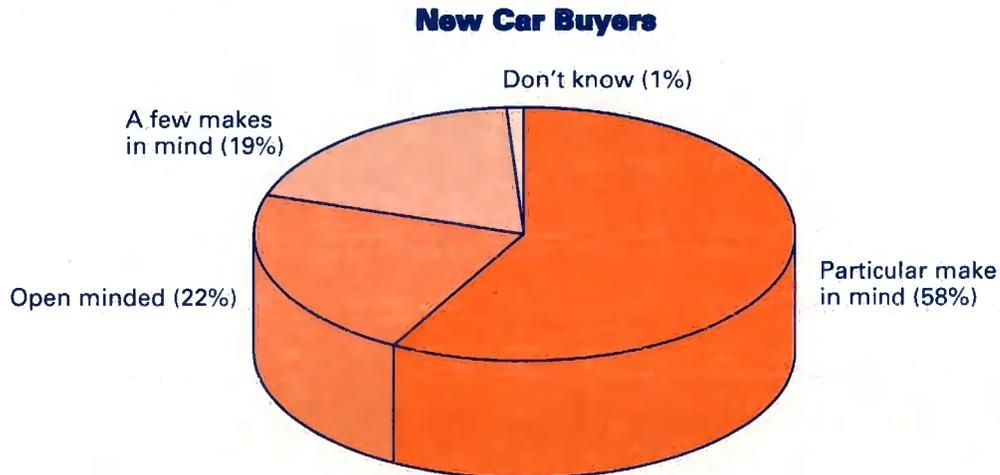
Source: Lex Report on Motoring 1993, The Consumer View/MORI

COMMITMENT TO CAR MANUFACTURER

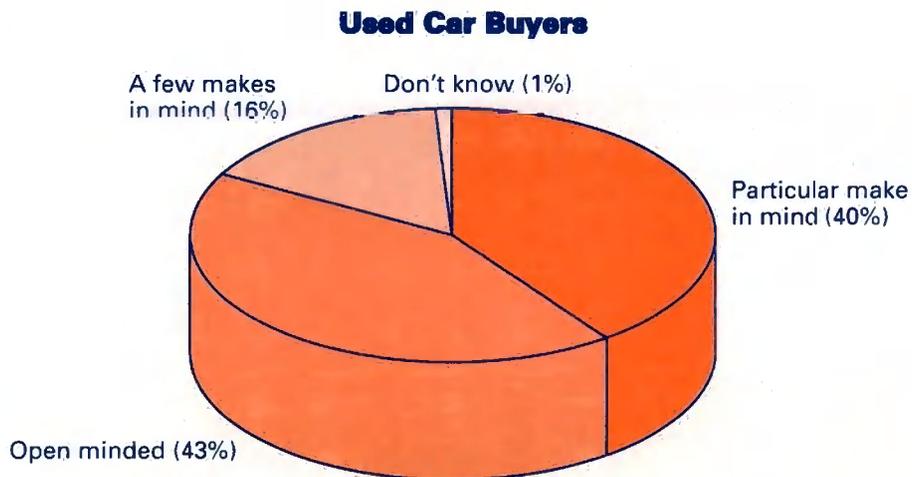
Three in five new car buyers in the last two years say they had a particular make in mind when they are looking for a car. One in five feel they were completely open-minded, whilst 19% had a few makes in mind.

This compares with two in five second hand car buyers who knew the make they wanted. Two in five say they were open minded, whilst 16% had a few makes in mind.

Q When you were buying that car did you have...?



Base: New car buyers in last 2 years (210)



Base: Second hand car buyers in last 2 years (649)



CAR FEATURES - LIKES AND EXPECTATIONS

This year's Lex Report on Motoring shows drivers have high expectations for their next car in terms of the features they contain particularly in the area of security. This confirms the earlier findings that drivers intend to put considerably more emphasis on security features in their next car purchase than in their last car purchase. Only 33% currently have central locking in their cars, 49% expect the next car to have this feature and 60% would like to have this feature if money were no object.

The gap between the current situation and expectations is even wider for car alarms. Currently 26% of drivers have a car alarm while 45% expect their next car will have one and 59% would like to have one if money were no object. Although the expectations are lower, the gap between the current situation and expectations is also wide for high security door locks – deadlocks. Currently 11% have this feature on their cars while 29% expect to have it on their next car and 54% would like to have this feature if money were no object.

There is also clearly a potential demand for engine cut out devices to stop thieves with 8% currently claiming to have these, 21% expecting them and 51% wanting them if money were no object.

Thief-proof radio cassettes and CDs are expected by 34% in their next car, compared with 27% who currently have them and 56% would like them if money were no object. Other major gaps between current and expected features are apparent with respect to catalytic converters - while 8% currently claim to have them 25% would expect them and 45% would like them if money were no object; anti-locking brake systems where 10% have them, 24% expect them and 54% would like them; electric sun roofs where 11% have them, 21% expect them and 52% would like them and air bags where 1% have them, 9% expect them and 47% would like to have them.

On most features expectations and 'likes' are higher for men than for women, drivers of new cars than drivers of second hand cars, company car drivers than private car drivers and younger and/or middle aged drivers than older drivers.

Drivers of cars bought new have particularly high expectations in terms of

- central locking, 59% expect
- etched windows, 51%
- thief proof radio/cassette/CD, 47%
- catalytic converters, 34%

Drivers aged under 54 tend to be more security conscious with particularly high expectations with respect to thief proof radios/cassettes/CD's, high security door locks and car alarms.



Car Features - Like and Expectations

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

- a) does your current car have?
- b) do you expect your next car to have?
- c) would you like if money were no object?

	(a) Current %	(b) Expect %	(c) Like %	Expect minus Current ±%	Like minus Current ±%
-Security					
Thief proof radio/cassette/CD	27	34	56	+ 7	+29
High security door locks/deadlocks	11	29	54	+18	+43
Separate thief proof boot	7	12	37	+ 5	+30
Car alarm	26	45	59	+19	+33
Central locking	33	49	60	+16	+27
Engine cut out device to stop thieves	8	21	51	+13	+43
Mechanical immobiliser (not a steering lock)	7	13	37	+ 6	+30
Windows etched with car number	43	43	48	0	+ 5
-Comfort					
Fully adjustable front seats- lumber support and height	48	42	56	- 6	+8
Adjust steering wheel	21	24	45	+ 3	+24
Air conditioning	15	16	51	+ 1	+36
Electric sunroof	11	21	52	+10	+41
-Safety					
ABS (Anti-lock braking system)	10	24	54	+14	+44
Airbag	1	9	47	+ 8	+46
100 mph speed limit	3	5	20	+ 2	+17
In board computer to detect fog, ice, traffic jams, roadworks etc	1	3	33	+ 2	+32
-Performance/Environment					
Catalytic converter	8	25	45	+17	+37
In board computer to calculate MPG, and average speed	3	4	27	+ 1	+24
In board computer to tell you best rate from A to B	*	2	29	+ 2	+29
Four wheel drive	4	6	36	+ 2	+32
Heated front windscreen	24	26	53	+ 2	+29
-Accessories					
Car phone	3	4	35	+ 1	+32
Fax	*	*	13	0	+13

Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



1993 LEX REPORT ON MOTORING – The Consumer View

Drivers in London have higher expectations than drivers elsewhere with respect to virtually every feature but particularly

- central locking, 60%
- high security locks, 43%
- anti-locking brakes, 36%
- catalytic converter 39%

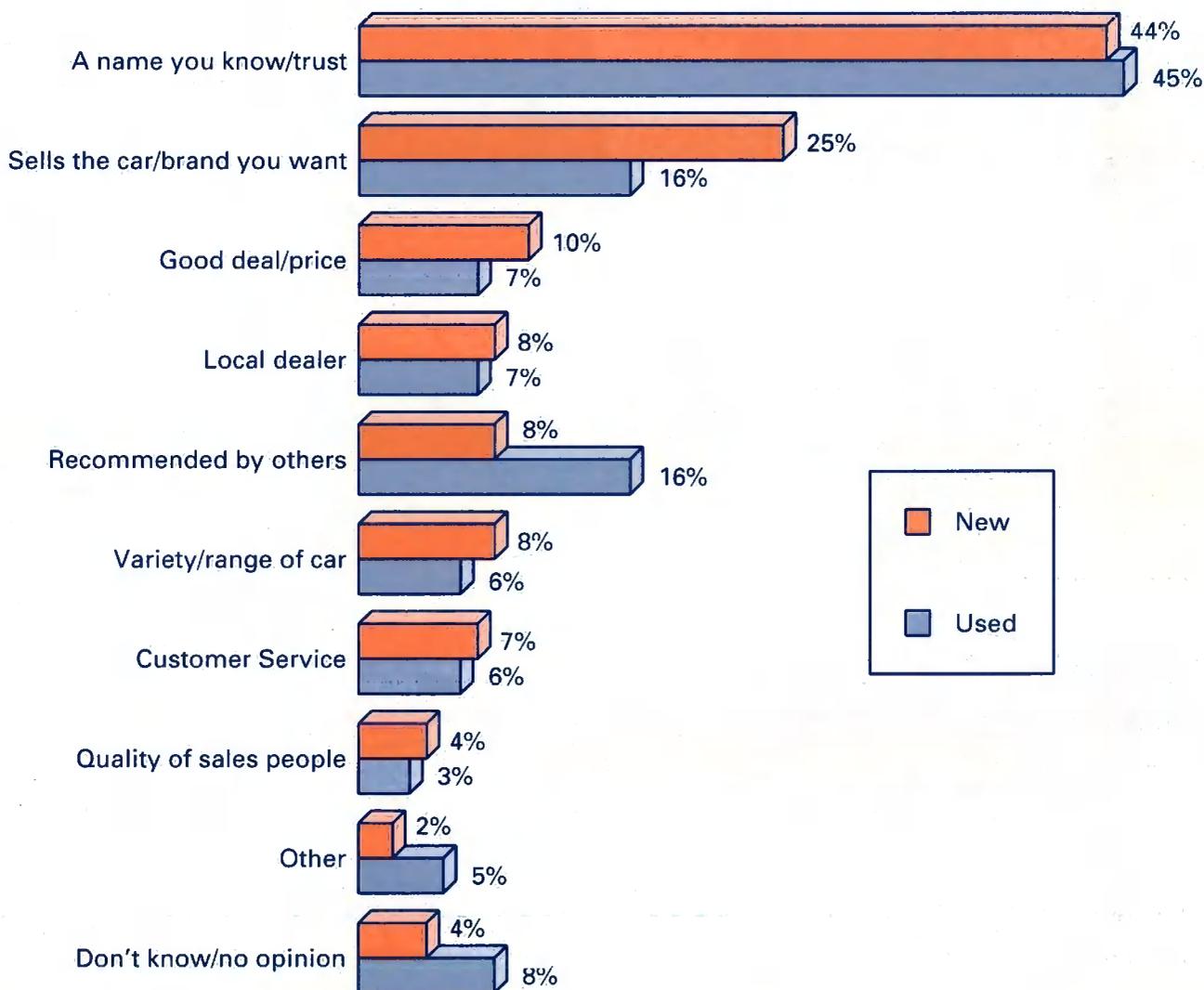
Base:	Car drivers bought:					
	All (2,011) %	Men (1,204) %	Women (807) %	New (762) %	Second hand (1,236) %	London (244) %
Thief proof radio/cassette/CD						
Current	27	30	22	44	19	29
Expect	34	38	30	47	29	40
Expect minus current	+7	+8	+8	+3	+10	+11
High security door locks/deadlocks						
Current	11	14	9	20	8	13
Expect	29	35	23	35	27	43
Expect minus current	+18	+11	+14	+15	+19	+30
ABS (Anti-lock braking system)						
Current	10	11	8	15	7	14
Expect	24	29	18	30	22	36
Expect minus current	+14	+18	+10	+15	+15	+22
Catalytic Converter						
Current	8	8	7	17	4	10
Expect	25	28	21	34	21	39
Expect minus current	+17	+20	+14	+17	+17	+29

Source: Lex Report on Motoring 1993, The Consumer View/MORI

IMPORTANT FACTORS IN CHOOSING A DEALER

A name you know and trust is thought important to buyers of new and second hand cars in their selection of a dealer. Around forty-five percent of both groups had this at the head of their list of most important factors in choosing a dealer. After that new car buyers were looking for a dealer selling the make or model they wanted (25%). This was also the second choice of second hand car buyers but to a lesser degree (16%). For these recommendation by others was almost as important (16%).

Q Which for you is the most important factor in choosing a car dealer?



Base: Bought new car from dealer (202)
Bought second hand car from dealer (370)

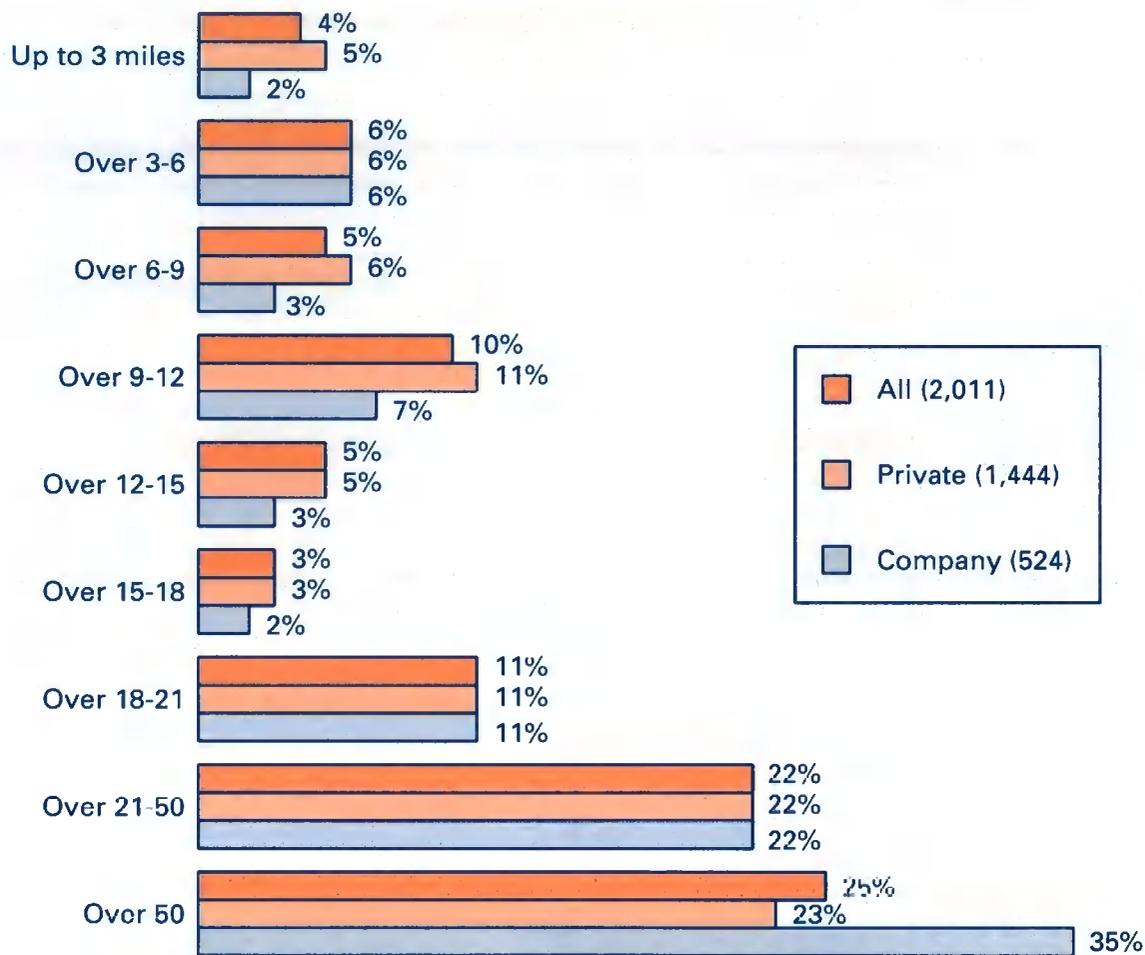


DISTANCE PREPARED TO TRAVEL TO BUY NEW CAR

New cars buyers are prepared to travel a considerable distance to buy a new car. Indeed one in four are prepared to travel over 50 miles and approximately half (44%) would drive over 21 miles.

Private car drivers are more reluctant than company car drivers to go much out of their way. While 45% of the former would drive over 21 miles 55% of the latter would do so.

Q What is the maximum distance you would be prepared to travel to buy a new car?



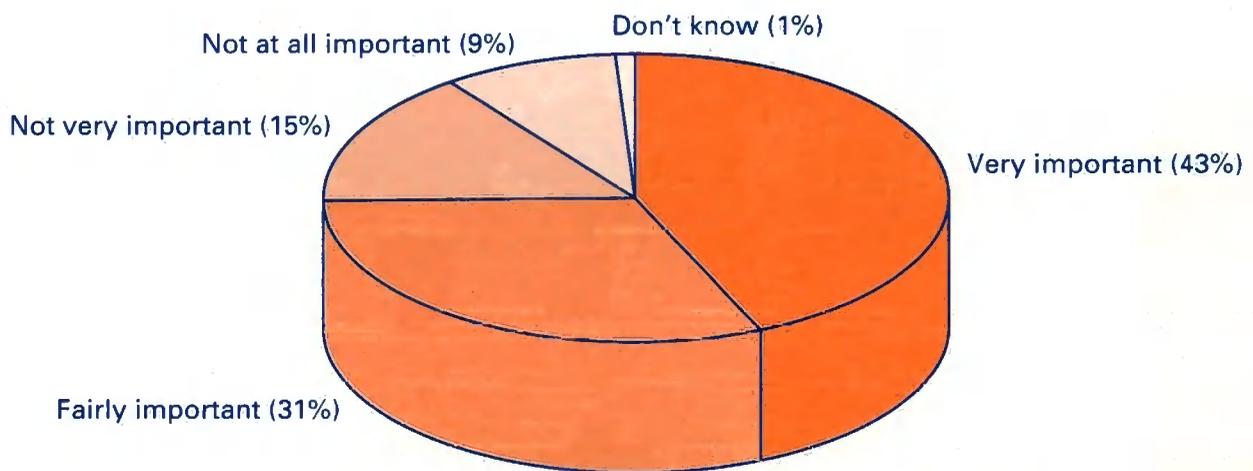
Base: All drivers (2,011)

All (2,011)	Average Private (1,444)	Company (524)
32 miles	31 miles	39 miles

IMPORTANCE OF ON-SITE SERVICE FACILITY

Three out of four (74%) of those who recently bought a new car from a dealer consider it very or fairly important to have the service facility very near to, or on the same site as, the new car showroom.

Q How important do you think it is to have the service facility very near to or on the same site as the new car sales showroom?



Base: All drivers bought new from dealer in last 2 years (202)



CONSUMER PROTECTION

Britain's drivers feel it is particularly important that motorists be given protection by legislation or government inspectors in the areas of mileometer fraud and guarantees/warranties – 75% of drivers felt this was very important for both these items.

Protection with respect to motor insurance was also ranked highly; 72% rated this as very important. Almost as many felt it was very important to have protection in the area of repairs and servicing; 69% said this was very important, rising to 76% of those who drive over 20,000 miles a year. Sixty-five per cent felt it was very important to have protection in the area of the sale of used cars and this was no different according to whether the respondent generally drove a car which had been bought second hand rather than new.

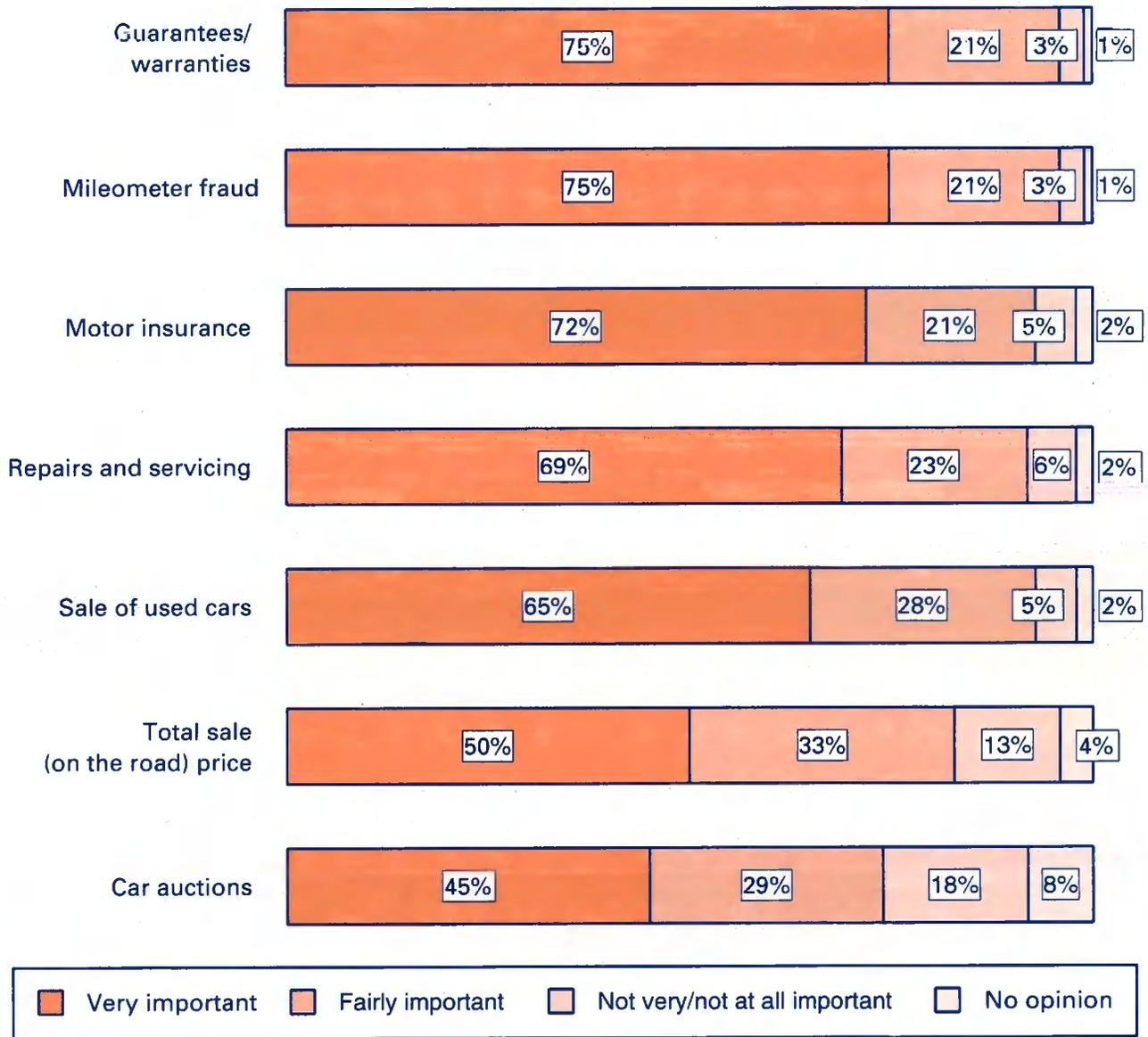
Rather fewer, 50%, felt it was very important to have such protection in respect of the total sale (on the road) price, although among those aged 55+ this rose to 56%. Interestingly those who normally drive a new car were slightly more likely to consider consumer protection in this area to be very important (55%) than those who normally drive a second hand car (48%).

Finally, 45% felt that it was very important to have consumer protection in the area of car auctions although this was somewhat lower in London (34%) and was no higher than for those who normally drive a used car than those who normally drive a new car.



Consumer Protection

Q How important do you think it is that the motorist should be given protection by legislation or government inspectors in the following areas?



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



DIESEL CARS

Despite the fact that 78% of drivers believe that diesel cars are cheaper to run with cheaper fuel and lower cost per mile, only 4% say they are certain to consider buying a diesel car in the future and 33% say they are at least fairly likely to do so. Those who drive a company car or a second hand car were generally more likely to consider buying a diesel car in the future than the drivers of private cars or cars bought new. Men were somewhat more interested in diesel cars than women and those driving 20,000 miles a year or more were the most interested of any group.

The reason for this antipathy towards diesel cars seems to be in the other attributes applied to diesel cars compared to with petrol cars - the next five most frequently ascribed attributes were all negative; 57% of drivers consider diesel cars noisier, 33% regard them as having slower acceleration, 32% believe there are fewer models to choose from, 29% regard them as smellier and 27% believe they have more engine vibration, although 25% believe diesel cars are more environmentally friendly. Only 11% believe they are cheaper than petrol cars to buy. That having been said, relatively few - between 5% and 7% regarded diesel cars as less prestigious, less socially acceptable or less luxurious than petrol cars.

However, as one might expect, those 4% who actually run a diesel car hold a stronger image of diesel than petrol cars, although it is not always the case. Although 97% saw it as cheaper to run (compared to 78% of all drivers) and 69% thought it was more environmentally friendly (compared with 25%), 54% saw it as having slower acceleration (compared to 33%) and 23% a lower top speed (compared to 16%). Thirty per cent acknowledged they had more engine vibration and 47% thought they were noisier than petrol cars.

While women were more likely than men to perceive diesel cars as noisier, men were generally the most negative, particularly with respect to slower acceleration (39%) more engine vibration (32%) and lower top speed (21%). However men were also more likely to see diesel cars as cheaper to run (83%) and more environmentally friendly (29%).

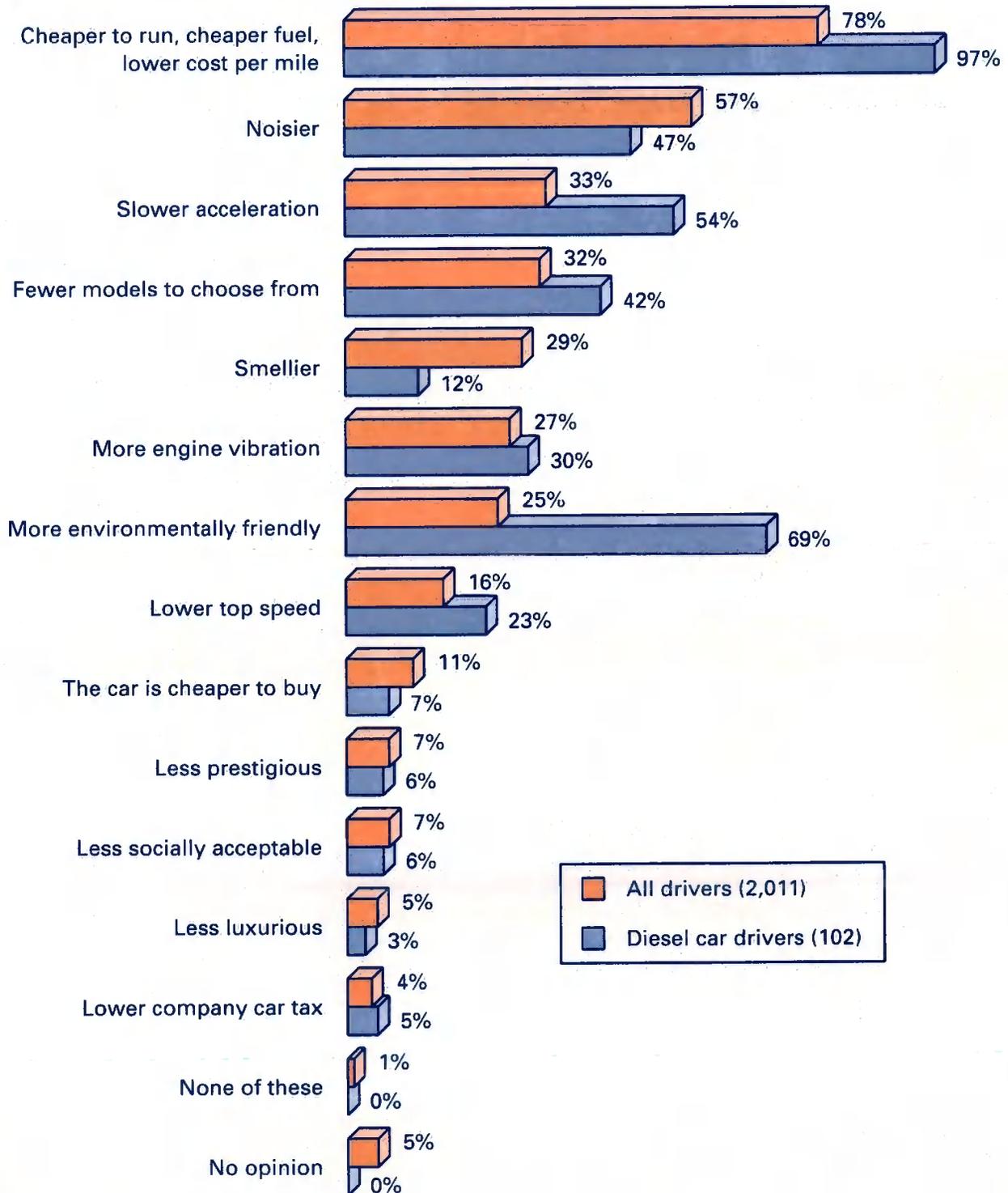
High mileage drivers (over 20,000) generally had a more positive image of diesel cars particularly with respect to them being cheaper to run (83%) and more environmentally friendly (36%). However they were also more likely than average to see them as having slower acceleration (46%) and a lower top speed (24%).



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Diesel Cars

Q Which of these attributes do you see as applying to diesel cars compared with petrol cars?



Base: All who drive a diesel car (102)

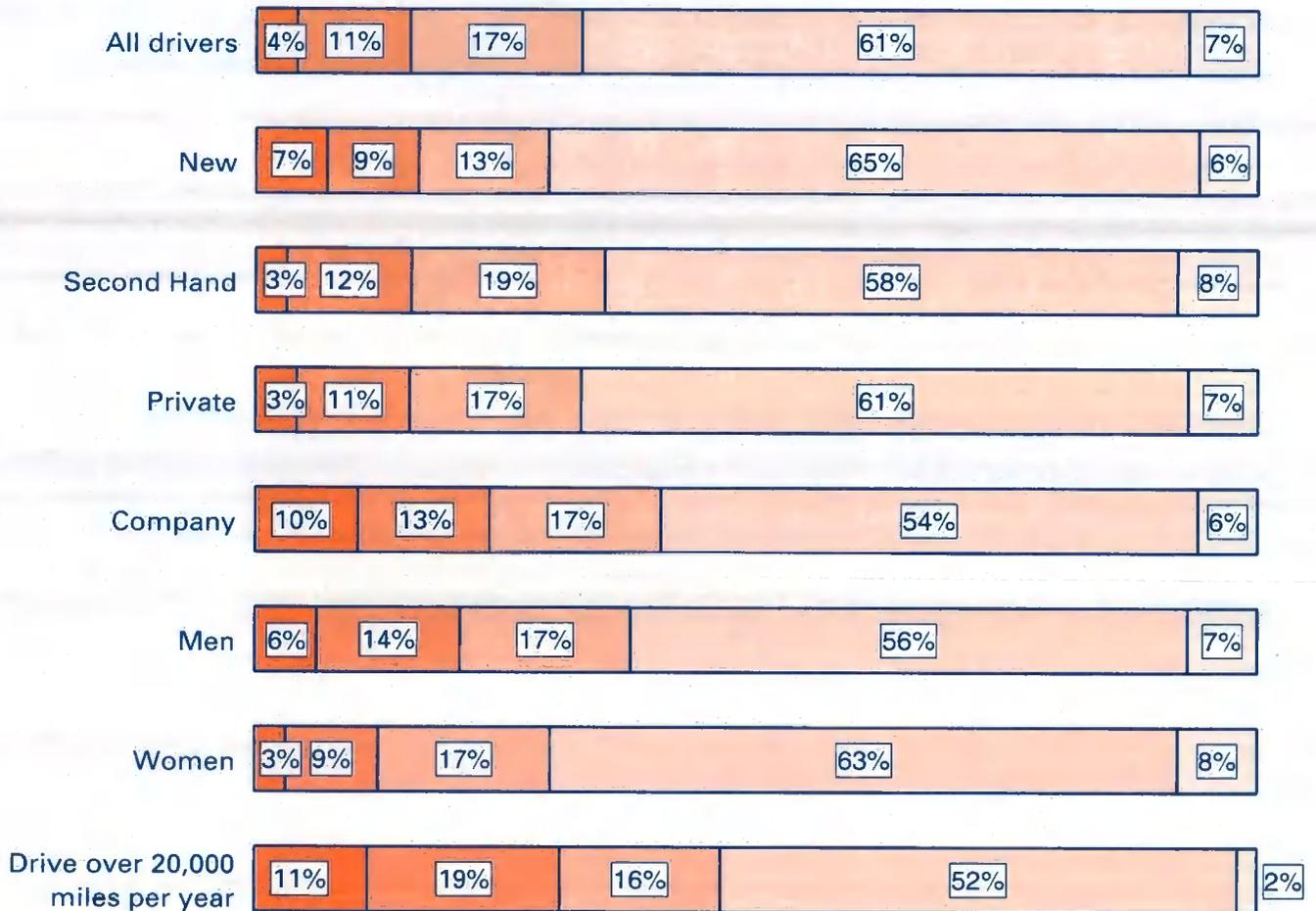
Source: Lex Report on Motoring 1993, The Consumer View/MORI



1993 LEX REPORT ON MOTORING – The Consumer View

Propensity to Buy a Diesel Car

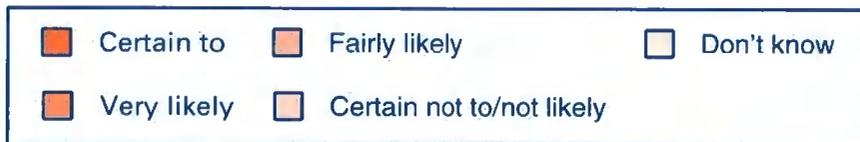
Q How likely are you to consider buying a diesel car in the future?



Base: All drivers (2,011)



Base: All whose car runs on diesel (102)



Source: Lex Report on Motoring 1993, The Consumer View/MORI



SERVICING



SERVICING

WHO DOES THE SERVICING?

Nearly all male drivers (94%) and three out of five (57%) female drivers have primary responsibility for getting their car serviced.

One in three (34%) have their car serviced by garage or workshop, although this tends to be higher for those driving second hand cars (38%) than new cars (26%). Only 24% of workshop customers drive cars bought new.

Around three out of ten (29%) have their car serviced by their main dealer for their make of car although this is far higher for new cars (61%) than for second hand cars (14%). An additional 3% go to a main dealer for another make.

Sixty-five per cent of main dealer service work is on cars bought new, 61% of main dealer work is for cars up to three years old, 24% for cars between three and six years old and only 7% for cars over six years old.

One in four (22%) either physically service the car themselves or have it done by somebody else in their household and this is particularly high for men (28%), young drivers (34% of those aged 17-24) and those with second hand cars (28%). Second hand cars make up 89% of DIY servicing.

One in six (18%) have their car serviced by a friend or acquaintance and this is also particularly high for young drivers (31%) and those with second hand cars (23%). Altogether some 7.9 million drivers either service their car themselves or get someone else in their household or a friend or acquaintance to do it for them.

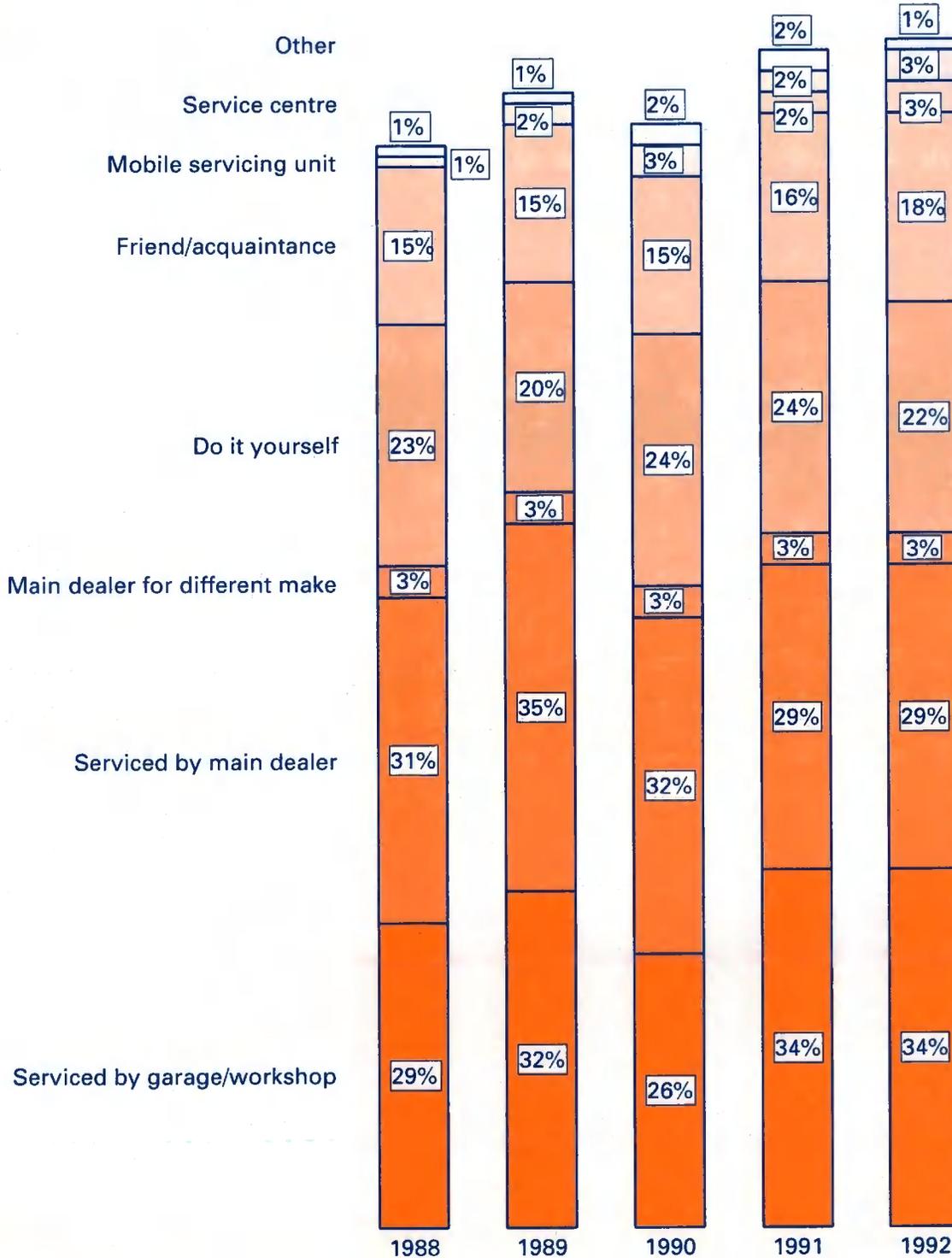
Service centres (3%) and others (4%) have a relatively small share of the market.

This pattern is very consistent with last year's survey but does suggest that over the last few years there has been a drift away from main dealer servicing towards other method, particularly 'friends/acquaintances'. This is likely to have particularly been the case for drivers of second hand cars.

It was also apparent that the number of drivers giving multiple answers to these questions has increased over the last two years. It is now an average of 1.14 - suggesting more are using a combination of means.

Who does the servicing?

Q Which of these do you do?



mobile servicing included in 'other' in 1988 and 1989
 Base: All with responsibility for getting car serviced (1,591)

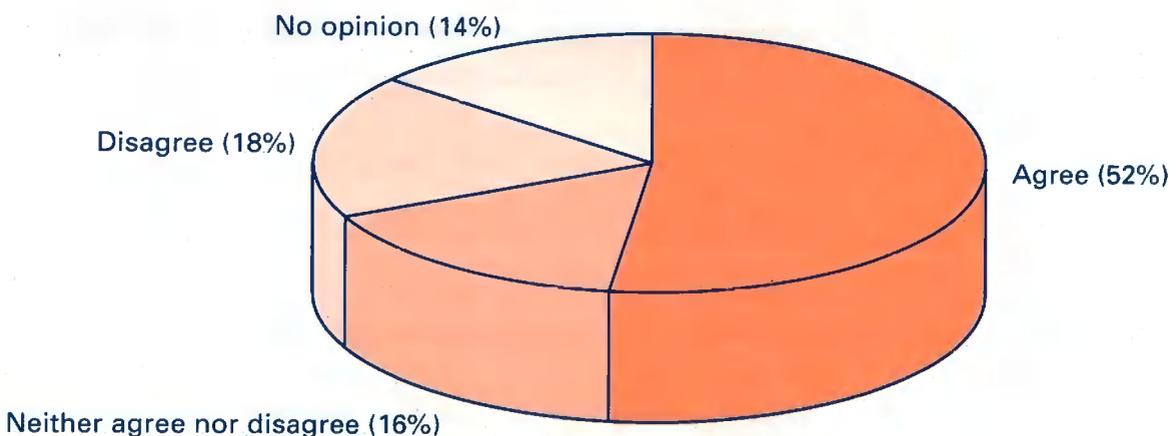
New car buyers are generally loyal to their dealers with respect to servicing. Three out of four (76%) of those who bought their car at a franchise dealer specialising in their make of car get their car serviced at a similar outlet. The rest use a variety of sources.

Second hand car buyers tend to be less loyal to franchise dealers. However, two out of five (43%) of those who bought their car at a franchise dealer also get it serviced at one. Most of the rest (35%) go to a garage which does not sell cars. Those who bought their car in a private deal tend to prefer DIY or a friend/ acquaintance (64%) as do those who bought from a friend or relative (47%) or a second hand car dealer (52%). In each case a garage which does not sell cars was the next preferred option for servicing.

SERVICING OF MODERN CARS

Half the drivers in Britain believe that servicing has become very difficult to do properly with modern electronic engines and high tech cars; 52% agreed with this view while 18% disagreed. Although men (63%) were far more likely to agree than women (38%), the latter being much more likely to hold no opinion or take a neutral view.

Q “Servicing has become very difficult to do properly with modern electronic engines and high tech cars”

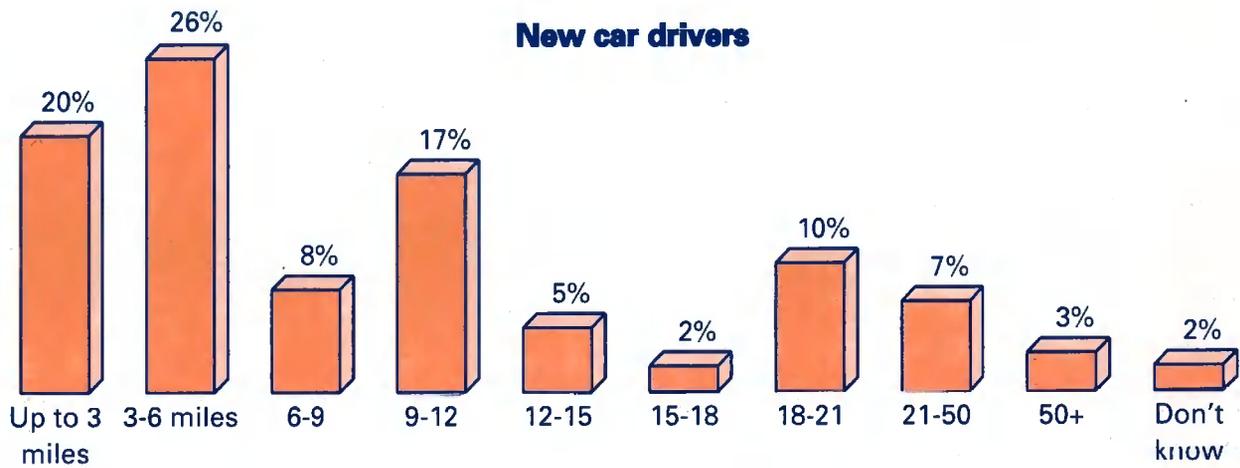


Base: All drivers (2,011)

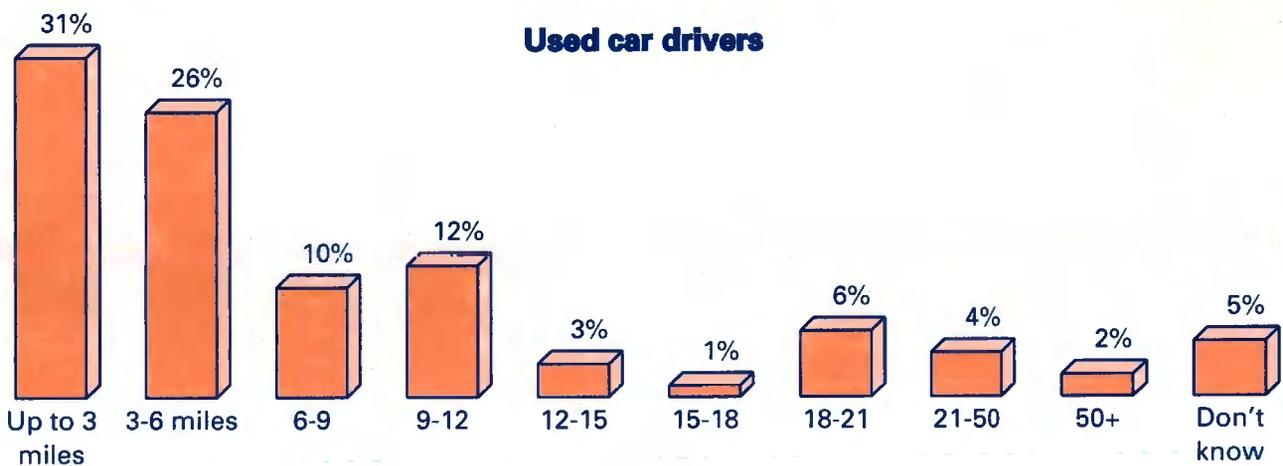
DISTANCE WOULD TRAVEL TO GET CAR SERVICED

Some drivers are prepared to drive a fair way to get their car serviced. One in six (13%) said they would drive over 18 miles, although half (53%) would set a maximum of 6 miles or less. New car drivers are prepared to drive further (11.8 miles) than second hand car driver (8.5 miles).

Q What is the maximum distance you would be prepared to travel to get your car serviced?



New car drivers responsible for getting car serviced (608)



Used car drivers responsible for getting car serviced (973)



SERVICING AND REPAIRS

The average car has been serviced 1.6 times in the last year. Three out of four (72%) have been serviced once or twice but one in eight (12%) - 3 million cars - have not been serviced at all. As one would expect, frequency of services relate to the number of miles driven, with cars driven less than 6,000 miles having had an average 1.4 services, those driven over 6,000-20,000 miles - 1.5 services, and those over 20,000 miles - 2.4 services. Taking the average miles travelled by these cars per year suggest that low mileage cars (0-6,000 miles) get serviced on average every 2,500 miles, (because the car is probably serviced on a time interval), medium mileage cars (6,000 - 20,000) about every 7,300 miles and high mileage cars (20,000+) every 12,300 miles. These will tend to be the newer cars with extended service intervals. Company cars seem to be serviced after rather more miles on average than private cars (9,500 compared with 6,000) and cars bought new after more average miles (7,400) than cars bought second hand (6,100 miles).

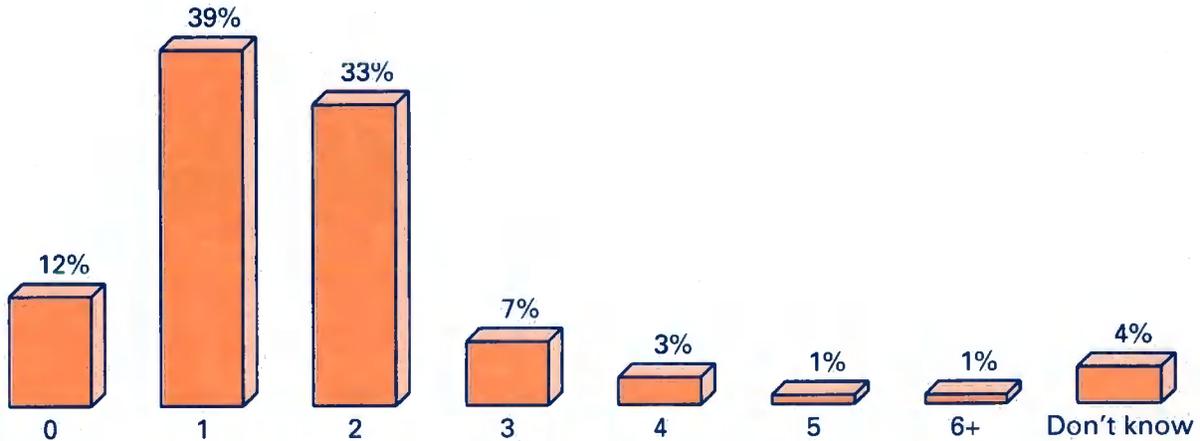
Half the cars in Britain have had some kind of repair in the last year with the average number of repairs around 0.9. Cars bought new have been repaired an average 0.6 times, those bought second hand an average 1.0 times, and repairs are related to the age of the car as one might expect. Those aged up to three years have been repaired an average of 0.4 times, those three to six years old an average of 0.8 times and those over six years an average of 1.3 times.



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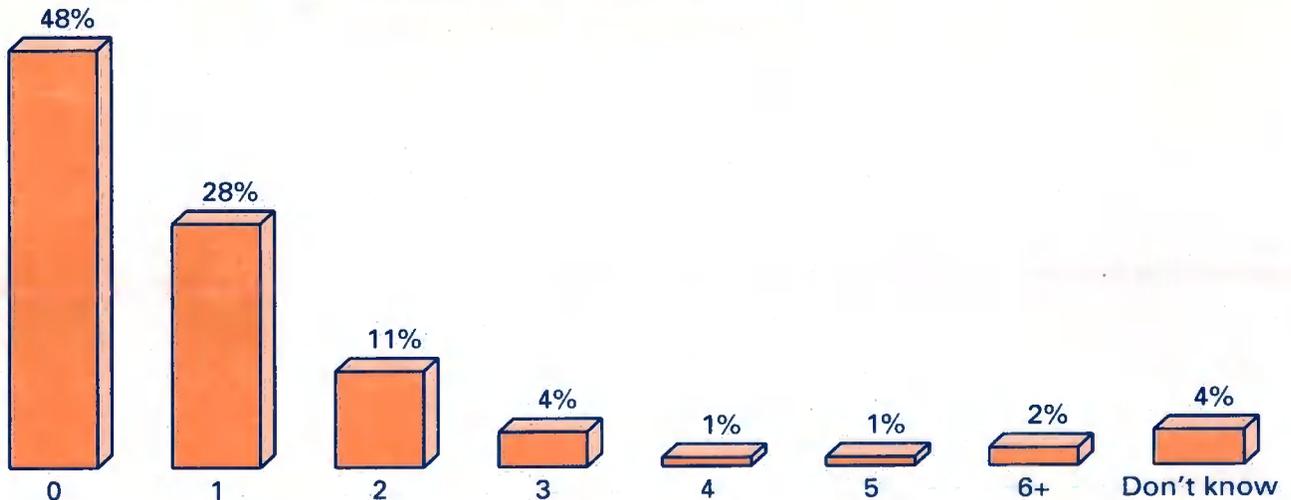
Frequency of Servicing and Repairs

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



	Age of car						Miles driven/year		
	All (2,011)	New (762)	Second Hand (1,236)	Up to 3 years (738)	3-6 years (588)	Over 6 years (666)	0- 6000 (513)	6001- 20000 (1,099)	20,000+ (281)
Average	1.6	1.6	1.5	1.5	1.5	1.6	1.4	1.5	2.4
Est. Miles between services	6,000	7,400	6,100	8,600	6,400	5,200	2,500	7,300	12,300
Est. time between servicing -months	7	7	8	8	8	7	9	7	5

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



	Age of car						Miles driven/year		
	All (2,011)	New (762)	Second Hand (1,236)	Up to 3 years (738)	3-6 years (588)	Over 6 years (666)	0- 6000 (513)	6001- 20000 (1,099)	20,000+ (281)
Average	0.9	0.6	1.0	0.5	0.8	1.3	0.9	0.9	1.0

Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



REASONS FOR SERVICING

Practices vary with respect to what determines when the car gets serviced. Just over one in four (29%) of those responsible for getting their car serviced say this is done after a certain number of miles although this is more common for men (32%) than for women (23%). One in four (23%) have their car serviced according to the recommended service intervals, slightly fewer (17%) tend to get it serviced when something starts going wrong; this is particularly true of women drivers (20%).

Sixteen per cent get their car serviced after a certain time and 9% when the MOT is due.

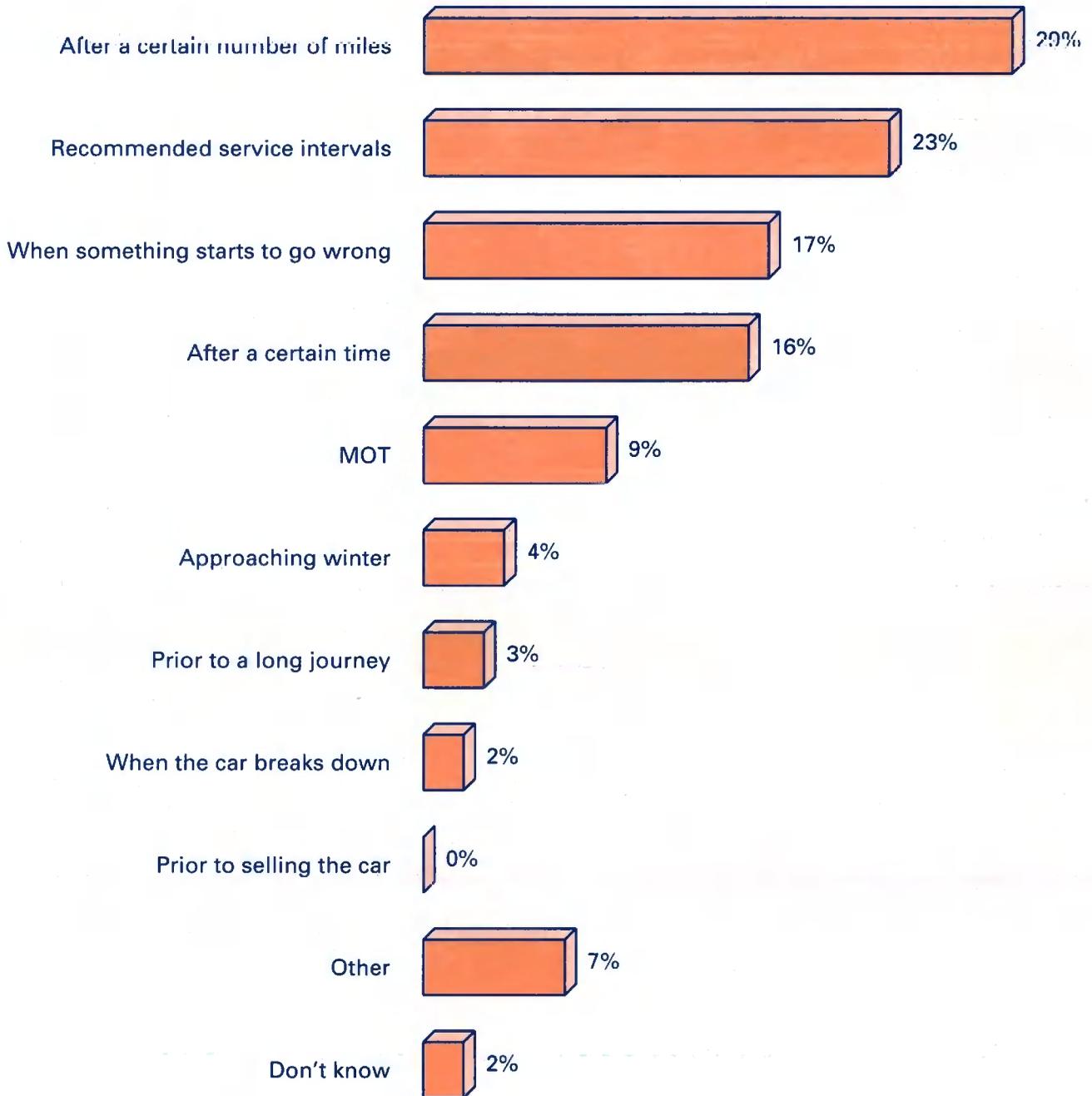
Patterns vary by miles driven per year; 50% of those driving over 20,000 miles get their cars serviced after a certain number of miles while only 18% of those driving up to 6,000 miles take this approach. The latter are more likely to opt for a certain period of time (21%) or when the MOT is due (16%) or when something goes wrong (17%).

Young drivers - those aged 17-24 - are much more likely to wait until something starts going wrong with a staggering 38% taking this approach. New car drivers are much more inclined than second hand car drivers to have their car serviced after a set number of miles (37% and 25% respectively) or at the recommended service interval (39% and 16%) and much less likely to leave it until something goes wrong (5% and 23%). Similarly drivers of company cars are more likely than private car drivers to have their car serviced after a certain number of miles (48% and 27%) as at the recommended service interval (36% and 21%). One in five (19%) of private car drivers will wait for something to go wrong compared to just 5% of company car drivers.

The average car gets serviced about once every seven months, although this is slightly higher for low mileage cars - once every nine months and lower for high mileage, over 20,000 cars - once every five months.

Reasons for Servicing

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



Base: All responsible for servicing (1,591)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



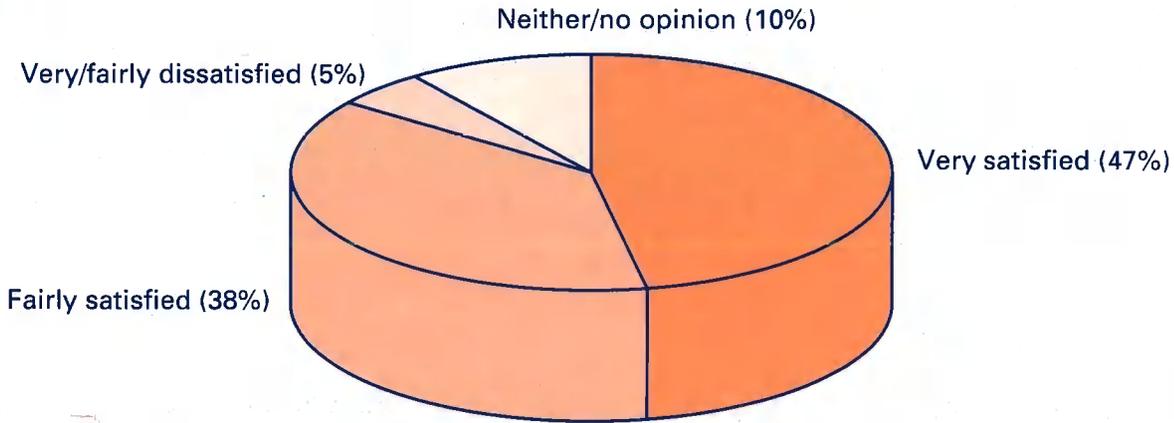
SATISFACTION WITH SERVICING

Overall 87% of respondents responsible for getting their cars serviced expressed satisfaction with the way this was done and only 3% dissatisfaction, although satisfaction was slightly higher among those who use a garage or workshop than a main dealer. Eight-four per cent of those who had their cars serviced by a main dealer for their make of car expressed satisfaction and only 5 per cent dissatisfaction; this represents some 5 million satisfied customers compared with 0.3m dissatisfied customers. Ninety-two per cent of those who had their cars serviced by a garage or workshop expressed satisfaction and only 2% dissatisfaction - an improvement on last year.

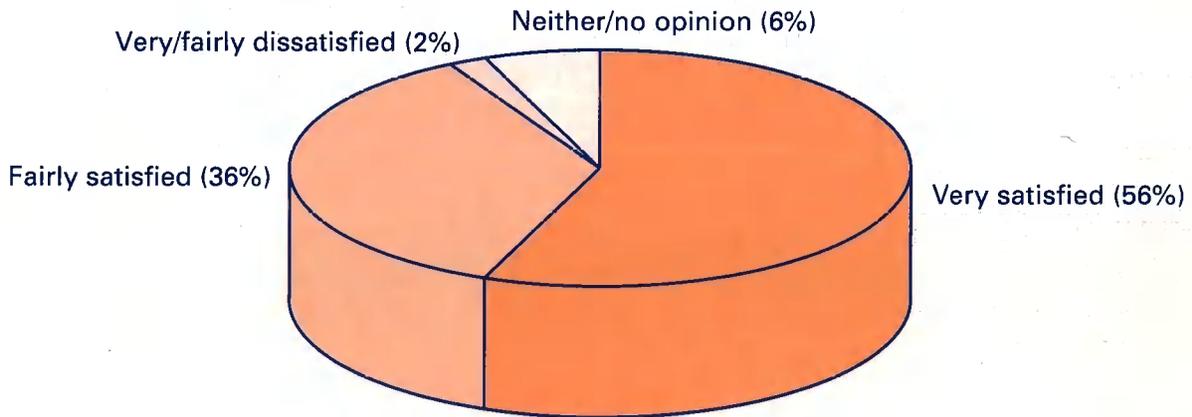
A major reason for the very high levels of satisfaction, which was confirmed in last year's survey, is that those who are dissatisfied decide to get their car serviced elsewhere so those we interview are most likely to have found a garage they are happy with.

Satisfaction with Servicing

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



Base: Car serviced by main dealer for make (559)



Base: Car serviced by garage/workshop (512)

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

CONTROLS, SAFETY AND SIGNS

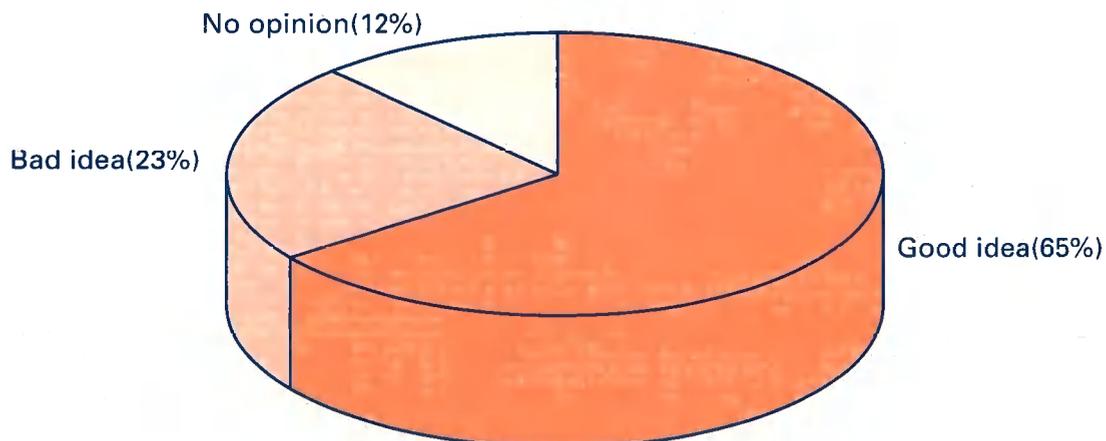
WRITTEN DRIVING TEST

A clear majority of the public believe it will be a good idea to have a written driving test in Britain, 65% hold this view compared to 23% who believe it will be a bad idea. Support is high irrespective of the age group of the driver but tends to increase with number of miles driven with 71% of those whose cars were driven 20,000 miles or more a year believing it would be a good idea compared to 64% of those whose cars were driven less than 6,000 miles a year.

If there was a written driving test, drivers have a very clear idea on two items which they feel ought to be included; 77% thought both the Highway Code and what to do in case of an accident should be subjects included in the test and only 4% of drivers thought these items should not be included.

Legal aspects of driving found support from 55% of drivers, first aid from 52%, simple car maintenance from 44% and simple mechanical aspects of the car from 42%. The only item on the list considered by drivers which was opposed by more than supported it was rules about driving abroad, 27% thought it should be included and 42% thought it should not.

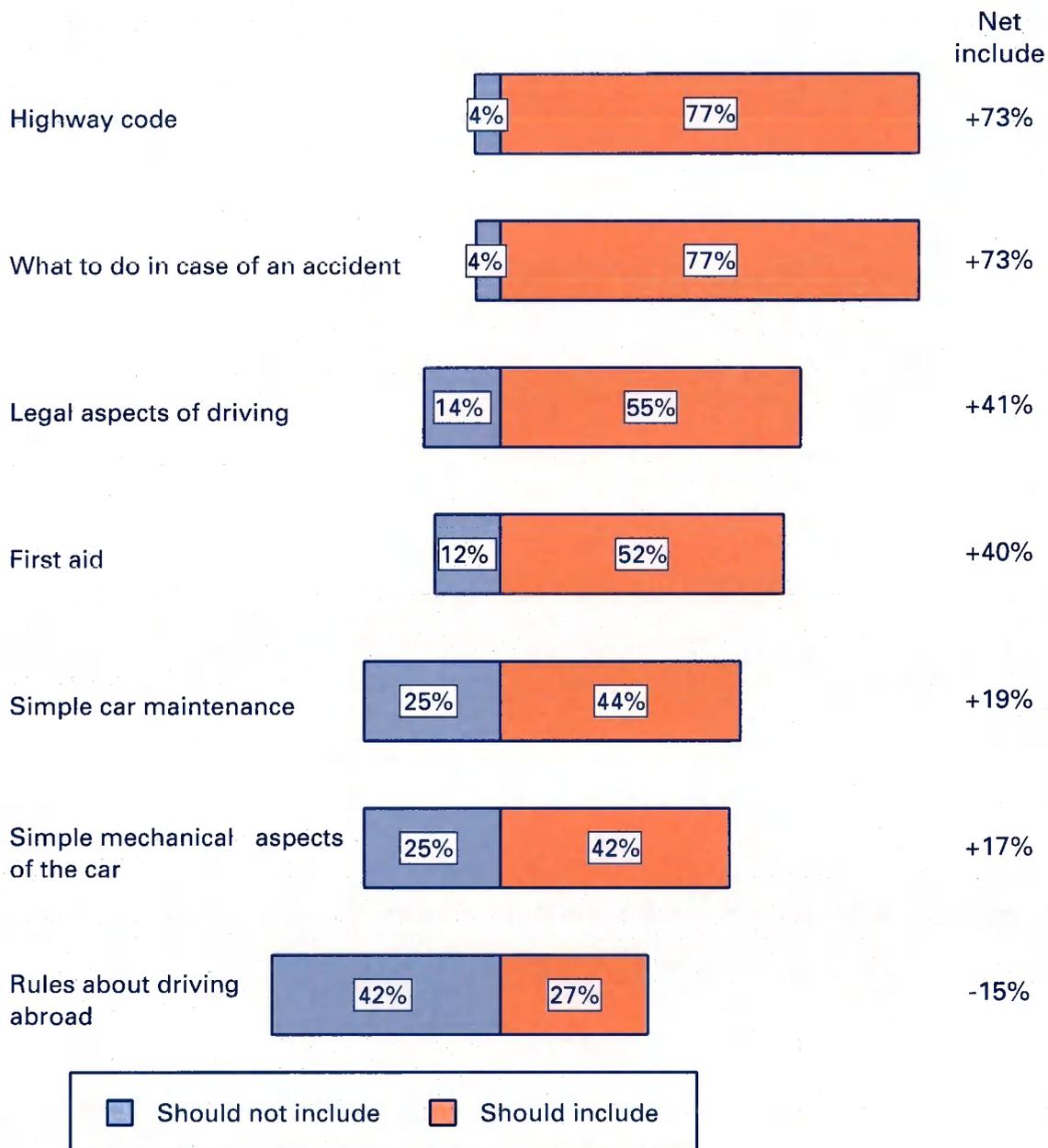
Q It has been proposed that there should be a written part to the driving test in Britain. On balance, do you think this would be a ...?



Base: All drivers (2,011)

Written Driving Test

Q If there were a written part to the driving test, which of these subjects do you think it should/should not include?



Base: All drivers (2,011)

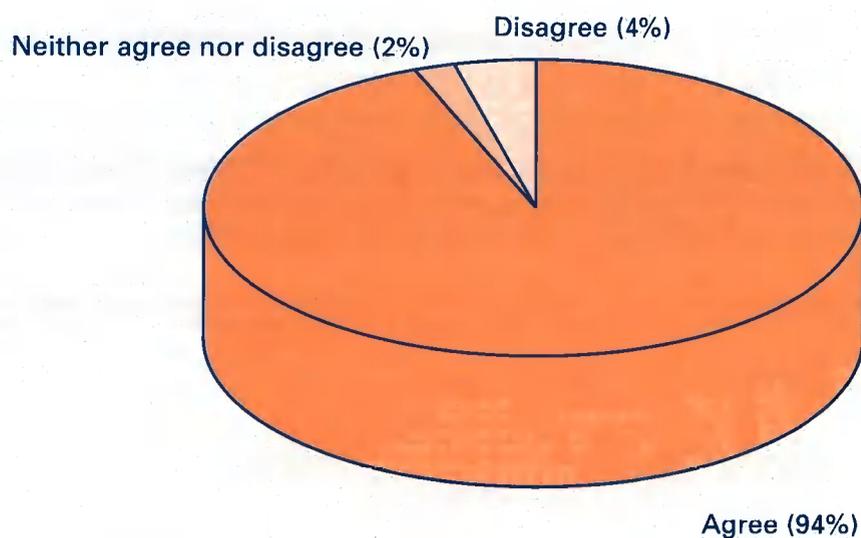
Source: Lex Report on Motoring 1993, The Consumer View/MORI

SAFETY AND SECURITY

MOT Tests

The vast majority of drivers (94%) agreed MOT tests are a good thing to ensure cars are road worthy - 68% agreed strongly with this statement and this rose to 76% of those who drive over 20,000 miles a year.

Q “MOT tests are a good thing to ensure cars are roadworthy”



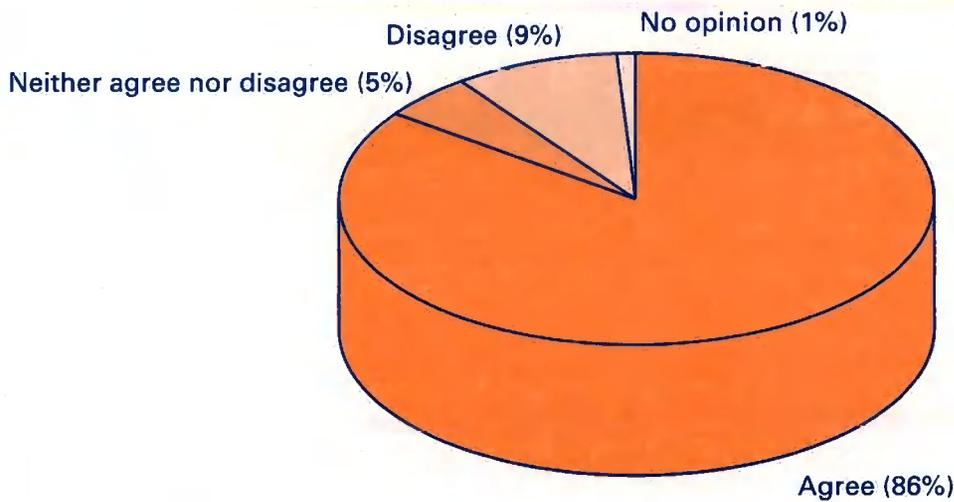
Base: All drivers (2,011)

SPEEDING PREVENTION CAMERAS

Female drivers tended to take a more serious view on all transport related crimes but particularly speeding and jumping red traffic lights. With respect to the latter, 74% of women thought that jumping a red traffic light at a busy time of day was extremely serious compared with 66% of men (see pp124-5).

Not surprisingly women were also more inclined to agree that cameras to catch speeding or drivers going through red traffic lights are an important contribution to road safety; 90% of women agreed with this view although so too did 82% of men. Overall, 86% of drivers support the use of such cameras and 9% disagreed. Support was particularly strong in Scotland where 93% agreed, but was less widely supported by those who drive a large number of miles. While 89% of those who drive up to 6,000 miles in a year agreed, this declined to 77% of those who drove 20,000 miles or more.

Q “Cameras to catch people speeding or going through red lights are an important contribution to road safety”

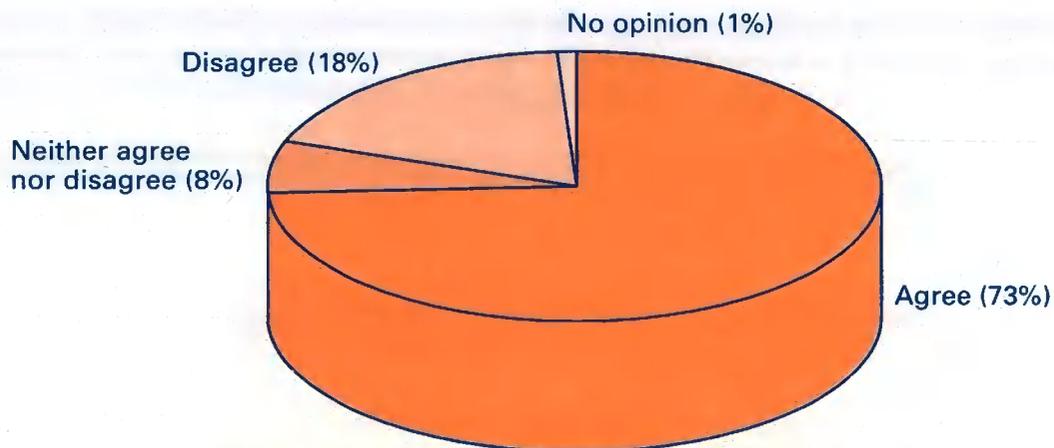


Base: All drivers (2,011)

SPEED LIMITERS

A surprisingly high proportion (73%) of drivers agreed with the view that all new cars should be fitted with devices to limit their top speed to 100 miles per hour; 18% disagreed. Although agreement declined with size of engine even the majority of those with engine sizes over 2000cc agreed with the proposal - 54%; as did 67% of those who drove over 20,000 miles a year. Women were significantly more likely than men to support the proposal with 79% agreeing, although 67% of men also agreed to a mechanical device to limit cars to a top speed of 100 miles per hour.

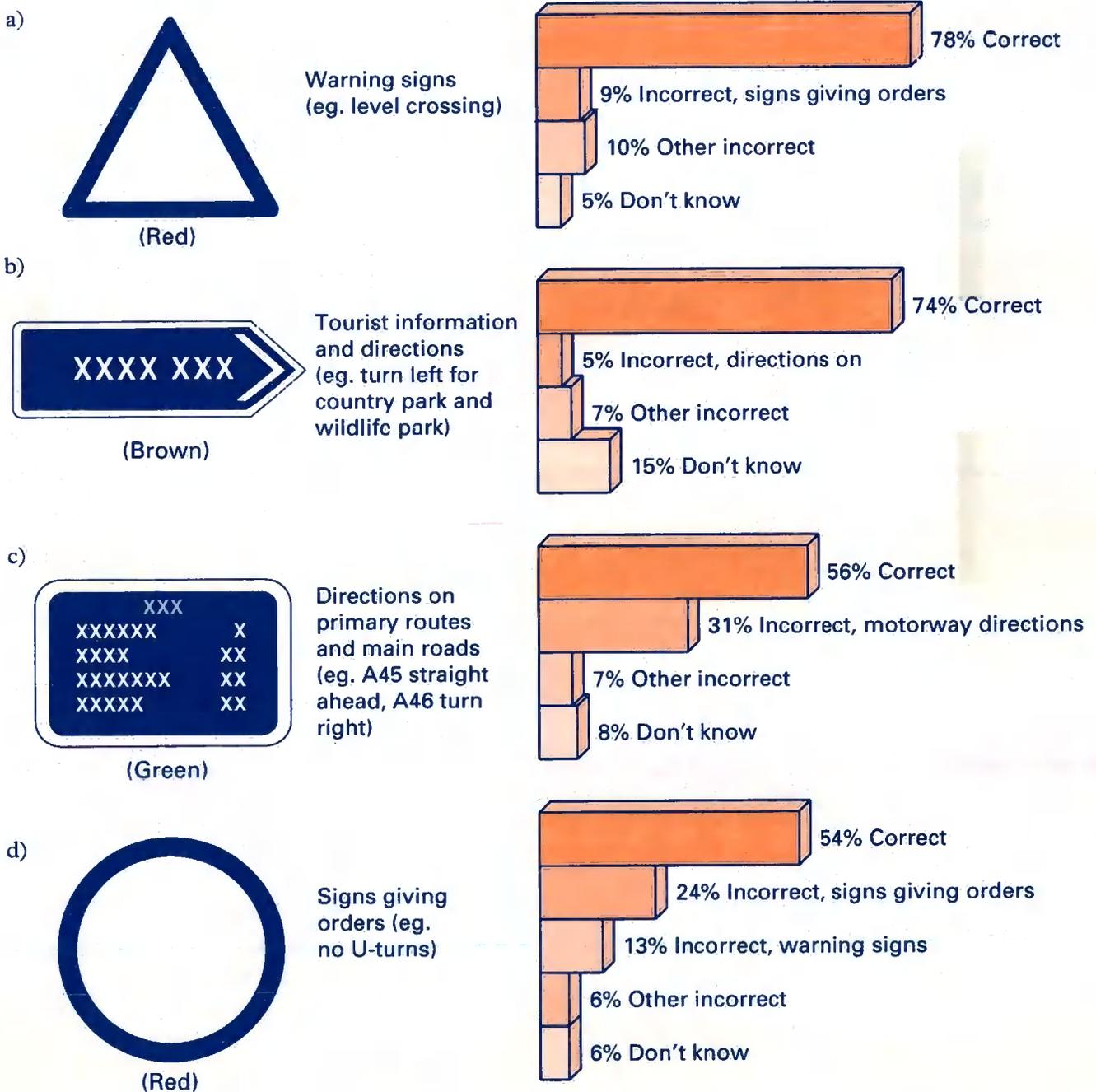
Q “All new cars should be fitted with devices to limit their top speed to 100 mph”



Base: All drivers (2,011)

Recognition of Road Sign Types

- Q Which of these sorts of information do you think is normally contained within a roadsign that is a ...?
- a) red triangle
 - b) brown sign with white directions and lettering
 - c) green sign with road numbers in yellow and directions in white
 - d) red circle



Base: All respondents (2,011) Source: Lex Report on Motoring 1993, The Consumer View/MORI

USE OF TOURIST SIGNS

Two drivers in three can remember on at least one occasion when they followed the brown signs to reach a particular tourist attraction or place. This is particularly true of those aged 25-54; 69% of whom said they had used this sort of sign before compared with 63% of drivers as a whole. Drivers in Scotland were least likely to have used them with only 42% recalling any occasions when they have followed that sort of sign.

Usefulness of tourist signs

There is no doubt that drivers generally consider such signs useful with 69% rating them 'very useful' and a further 24% feeling it 'fairly useful' to have special signs in different colours like this to direct strangers to visitor or tourist attractions. Even in Scotland, where use of such signs is relatively low, 91% of drivers regarded them as very or fairly useful.

The handful of drivers (7%) who did not consider them useful gave a variety of reasons, many of which were practical observations on their own experience. Some found them confusing or complicated, a few noted they were unsuitable if you were colour blind and a few felt there were not enough of them or they just seemed to stop when you were following them. For a third of those who said they were not useful we have no real explanation as to why.

Usefulness of Tourist Signs

Q Can you think of any occasion at all when you have followed this sort of brown sign to reach a particular tourist attraction or place?

A lot of times	16%
A few times	38%
Once	9%
No, can't recall any	37%

Base: All drivers (2,011)



CRIME

CRIME

CAR CRIME

Just over a quarter of all drivers in Britain (28%) claimed to either have had one of the cars in their household broken into and items stolen (17%) or one of the cars vandalised (16%) or one of them stolen (5%) within the last two years. These figures suggest a far higher incidence of car crime than is officially recorded, although people's recall of events over a two year period may not be totally accurate.

The 5% who have had a car stolen in the last two years is consistent with the Home Office figure of 0.5 million cars stolen in 1991. However the 17% who said a car in their household had been 'broken into and had items stolen' in the last two years suggests a considerably greater level of crime than the 913,000 reported thefts from motor vehicles in 1991 recorded by the Home Office.

Respondents in London and in the North seemed to be most prone to car crime with a third of drivers claiming to have experienced one of the three forms of crime, while those in the South-East, East Anglia, Wales and South-West seemed to be less vulnerable.

Some of the comments given when asked what they considered the worst things about their experience were as follows:

"The thought that we didn't feel the insurance would cover us to replace it. It was an old car, and the inconvenience, it was a nightmare." Female, 25 years, Stoke-on-Trent.

"Someone going through your car ... it doesn't feel nice." Male, 22 years, West Derby.

"It was arriving at the car and finding it 'done' made me feel sick. Second time in a few weeks." Female, 40 years, Blaby.

"The hassle with the insurance company and inconvenience. I was without it for 11 weeks which made it extremely difficult. It took them that long to pay." Female, 42 years, Gravesham.

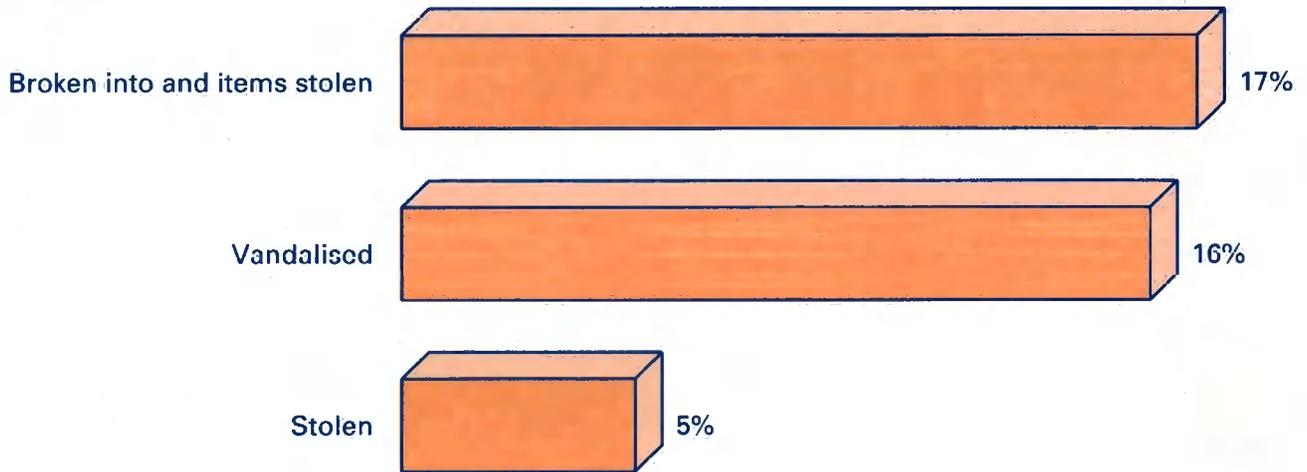
"Vulnerability ... it happened three times. You wonder when it is going to happen again – we had a spate of it here. The insurance company takes too long to sort it out." Female, 41 years, Gravesham.

"I was shocked when my number-plate was stolen. I was slightly perplexed as to who'd done it. I had to ring my brother wondering where I would get a new number-plate." Male, 75 years, Stoke-on-Trent.

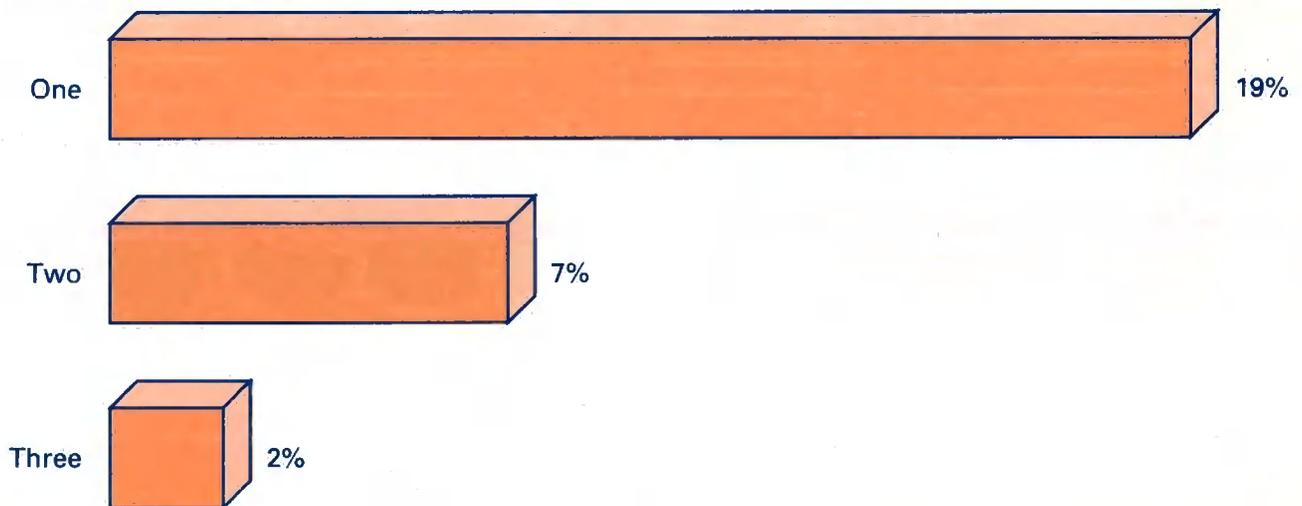
"I thought that someone had stolen something that belonged to me." Female, 30 years, Portsmouth.

Car Crime

Q In the last two years, have any of your household's cars been ...?



Summary of frequency (proportions experiencing any of the above)



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

MOTORING OFFENCES

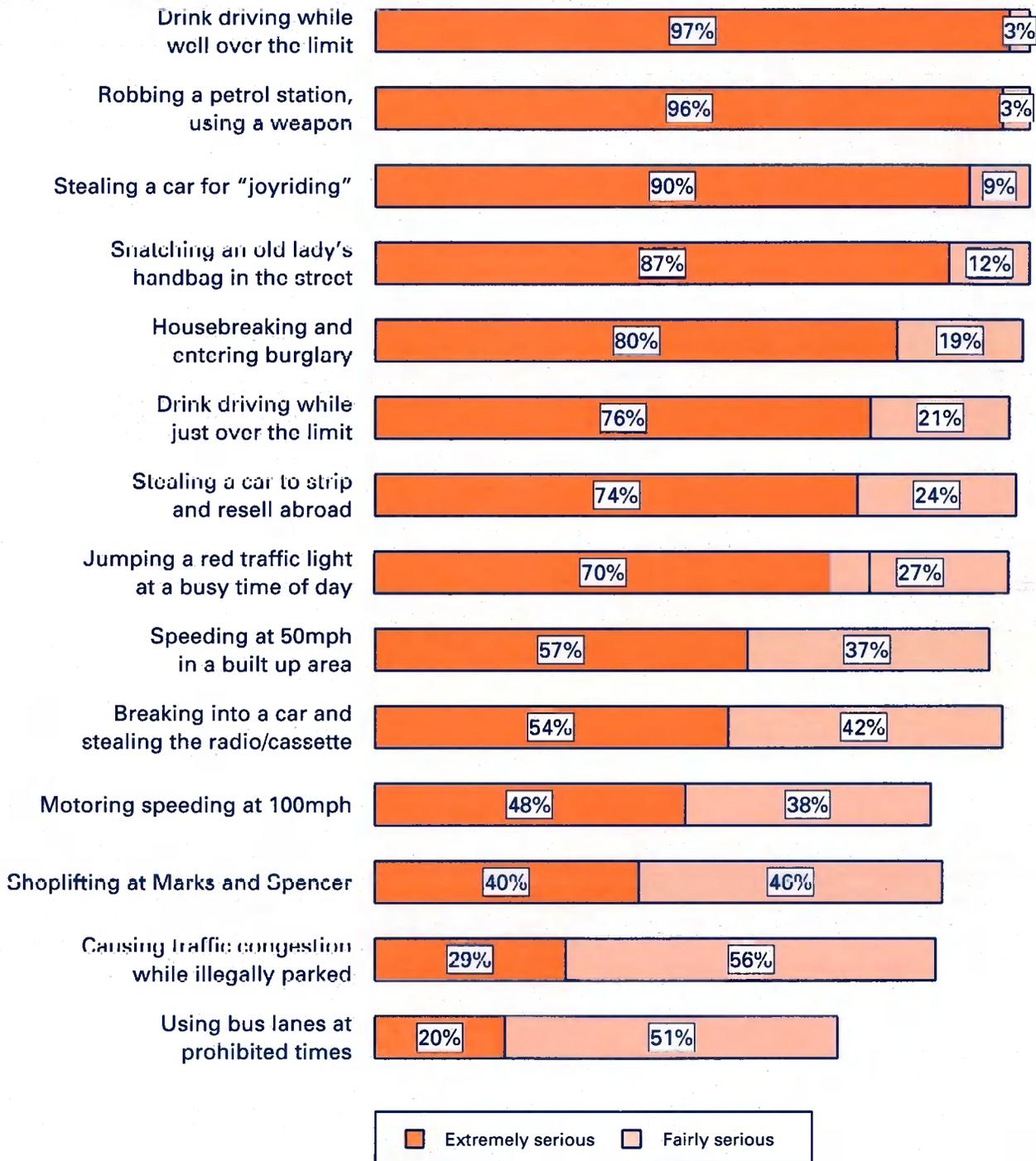
Drivers take a particularly harsh view of drink driving. Drivers were asked to rate fourteen separate crimes, some related to driving some not, in terms of their seriousness. Drink driving while well over the limit was rated as extremely serious more than any other crime; 97% consider it an extremely serious offence, just ahead of robbing a petrol station using a weapon which was considered extremely serious by 96%. Drink driving while just over the limit was considered extremely serious by 76%, almost the same proportion (74%) who considered stealing a car to strip and re-sell abroad extremely serious, but those were considered less serious than stealing a car for joy riding (90%), snatching an old ladies handbag in the street (87%) or housebreaking and entering - burglary (80%).

Jumping a red traffic light at a busy time of day (70%) and speeding at 50 mph in a built up area (57%) were both considered more serious than breaking into a car and stealing the radio (54%). Motorway speeding at 100 mph was considered less serious although still - 48% considered it extremely serious and more so than shoplifting in Marks & Spencer, considered extremely serious by 40%.

The least serious crimes of those considered were causing traffic congestion while illegally parked (29%) and using a bus lane at prohibited times (20%). Generally all crimes tended to be considered more serious by older drivers than by younger drivers.

Motoring Offences

Q How serious you consider the following offences to be?



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI

MISDEMEANOURS PROPOSED AS OFFENCES

Drivers were asked about a number of types of behaviour which they believe should be offences. These are headed by lying about the condition of the car while selling privately - 89% believe this should be an offence although this dropped to just 73% of young single males. At least 80% believe the following should be offences: using a disabled space (84%), using a car telephone while driving along (82%), wearing headphones in the car while driving (82%) and driving too close behind another vehicle (81%).

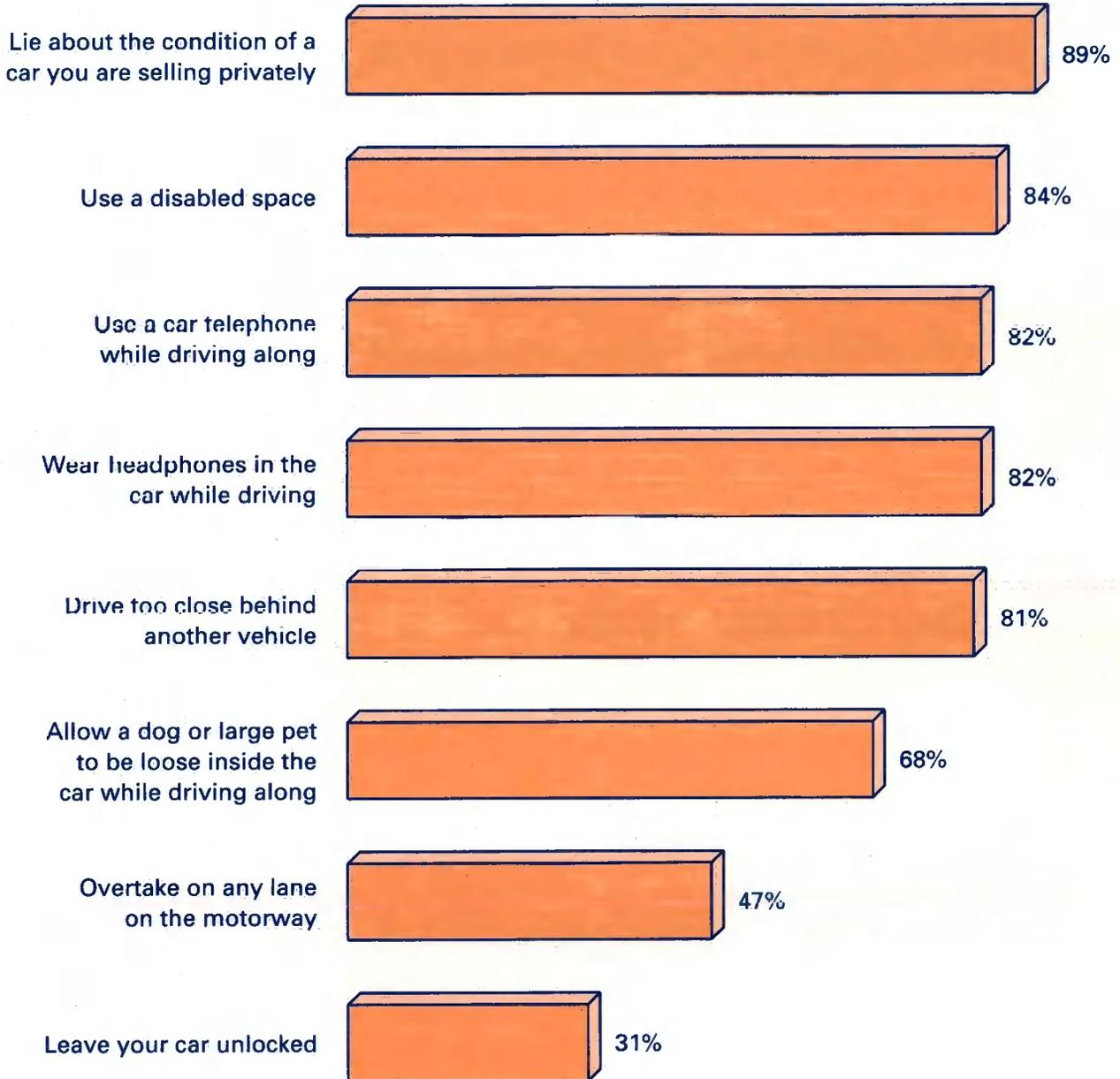
Two in three drivers believe it should be an offence to allow a dog or large pet to be loose inside the car while driving along, although this falls to just half of those drivers aged 17-24.

Drivers have mixed views on whether or not it should be an offence to overtake on any lane on the motorway; 47% think it should be an offence while 48% believe it should not. Views tend to be correlated with age with the majority of those aged 17-24 believing it should not be an offence while the majority of those aged 65+ believe it should be an offence. Those who drive the most miles tend to be slightly less inclined to believe it should be an offence than those who drive fewer miles.

One in three drivers (31%) believe it should be an offence to leave your car unlocked.

Misdemeanours Proposed as Offences

Q Do you think it should be an offence to . . . ?



Base: All drivers(2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



BRITAIN'S CAR INDUSTRY AND THE FUTURE

IMPORTANCE OF BRITAIN'S CAR INDUSTRY

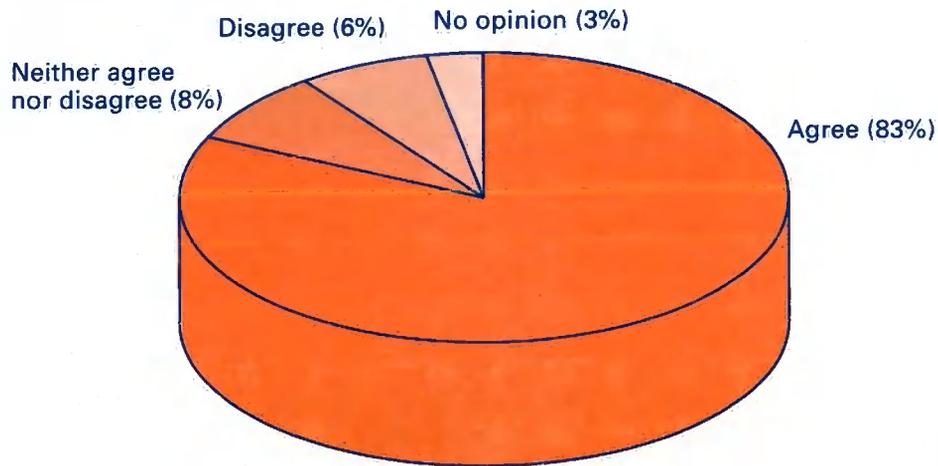
There is little doubt in drivers' minds of the importance of Britain's car industry. Eighty-two per cent agreed with the view that 'Britain's car industry' is vital to the British economy and only 7% disagreed. As one would expect, strength of agreement was particularly high in the Midlands although it was also correlated with age - the proportion agreeing strongly averaged 40% but ranged from 32% of those aged 17-34 up to 52% of those aged 65+.

TAXES ON MOTORISTS

Perhaps understandably, the majority of drivers (58%) felt that taxes for motorists are too high in relative to other kinds of taxes, although one in four (23%) disagreed. Agreement did not seem to vary according to the number of miles driven and, interestingly, those with more cars in the household were less likely to agree than those with just one in the household. However, agreement was strongly correlated with social class. Whereas around half (47%) of AB (Upper Managerial and Professional people) agreed with the proposition this rose steadily through the social classes up to 70% of the DEs (Semi- and Unskilled Manual). Seemingly those with low household incomes were much more likely to agree than those with high household incomes suggesting responses are reacting at least as much to personal circumstances as to the principal of taxing motorists.

Importance of Britain's Car Industry

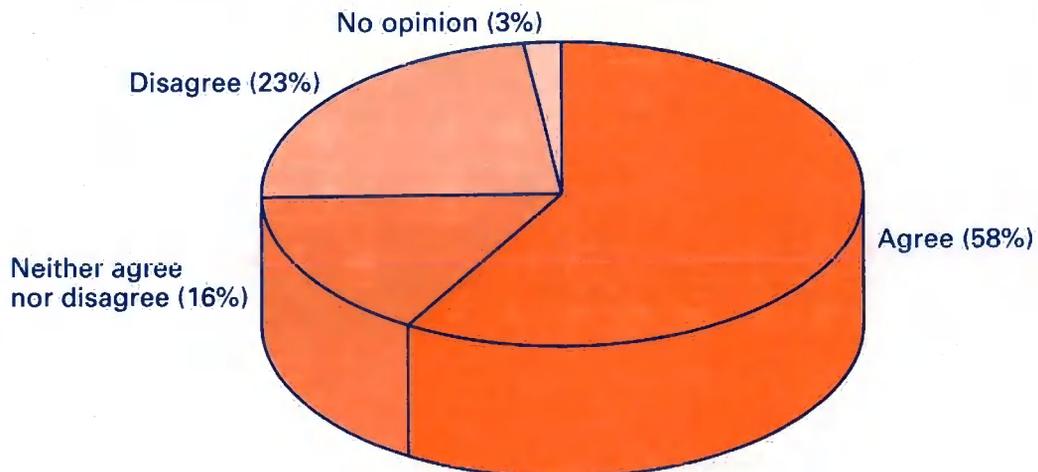
Q "Britain's car industry is vital to the British economy"



Base: All drivers (2,011)

Taxes on Motorists

Q "Taxes on the motorist are too high relative to other kinds of taxes"



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



EXPECTATIONS FOR THE YEAR 2001

Many drivers expect some radical changes by the end of the millennium. Sixty-two per cent that all new drivers will have to go through a probationary period before being granted a full-licence and 57% expect to see air-bags which inflate on impact as standard on all new cars. As many (57%) expect that we will have to pay tolls to use Britain's major motorways, a slight increase on the proportion who had that expectation a year ago.

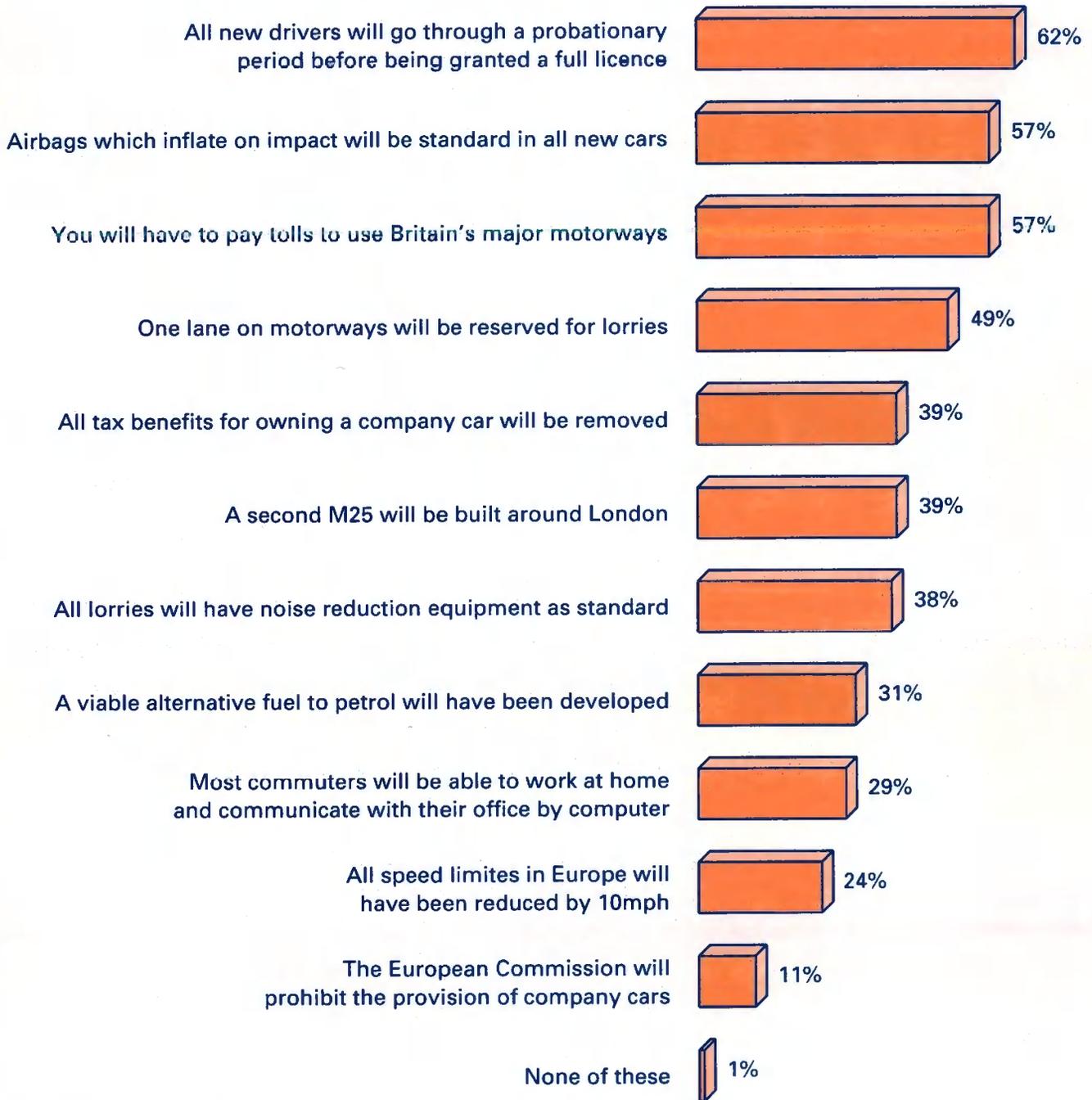
Half of Britain's drivers (49%) expect one lane on motorways will be reserved for lorries.

Two out of five drivers (39%) expect all tax benefits for a company car to have been removed and this includes 44% of company car drivers.

Two out of five (39%) expect a second M25 will have been built around London and this includes 41% of drivers in London and 44% of those in the South-East and 46% of those in Wales and the South West and East Anglia. A similar proportion believe that all lorries will have noise reduction equipment as standard. One in three expect to see a viable alternative fuel to petrol to have been developed. Three in ten expect most commuters to be able to work at home and communicate with their offices by computer. Twenty-nine per cent held this view including 30% of those who work full or part-time and those most likely to be affected - those in the AB social class (Upper Managerial and Professional workers) - were only marginally more likely to believe this will be the case than the rest of the population (32%).

Only 11% expect the EEC to have prohibited the provision of company cars.

Expectations for the Year 2001



Base: All drivers (2,011)

Source: Lex Report on Motoring 1993, The Consumer View/MORI



1993 LEX REPORT ON MOTORING – The Consumer View



APPENDICES



APPENDIX

STATISTICAL RELIABILITY

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

Research Findings

	Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total Drivers	2011	±1.3	±1.8	±2	±2	±2
	1250	±2	±2	±3	±3	±3
	1000	±2	±2	±3	±3	±3
	500	±3	±4	±4	±4	±4
	200	±4	±6	±6	±7	±7
	50	±8	±11	±13	±14	±14

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

For similar reasons, when comparing findings between two areas of the country, or between two sub-groups (eg 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 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%
1992 compared with 1991 base	2011-1277	+2.1	+2.8	+3.2	+3.4	+3.5
New vs used car drivers	762-1236	+2.7	+3.6	+4.1	+4.4	+4.5
Company vs private car drivers	524-1444	+3.0	+4.0	+4.6	+4.9	+5.0
Other sub-groups	1500-1250	+2	+3	+3	+4	+6
	1000-1000	+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.



SOCIAL CLASS DEFINITIONS

This appendix contains a brief list of social class definitions as used by the Institute of Practitioners in Advertising. These groups are standard on all surveys carried out by Market & Opinion Research International Limited.

	SOCIAL CLASS	OCCUPATIONS HEAD OF HOUSEHOLD
A	Upper Middle Class	Higher managerial, administrative or professional
B	Middle Class	Intermediate managerial, administrative or professional
C1	Lower Middle Class	Supervisor or clerical and junior managerial, administrative or professional
C2	Skilled Working Class	Skilled manual workers
D	Working Class	Semi-and unskilled manual workers#
E	Those at the lowest levels of subsistence	State pensioners, etc, with no other earnings



LEX REPORT ON MOTORING

FIVE YEAR INDEX (numbers refer to page in Report)

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

LEX REPORT ON MOTORING

FIVE YEAR INDEX (numbers refer to page in Report)

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



LEX REPORT ON MOTORING

FIVE YEAR INDEX (numbers refer to page in Report)

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



LEX REPORT ON MOTORING

FIVE YEAR INDEX (numbers refer to page in Report)

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



LEX REPORT ON MOTORING

Topics covered:

FIVE YEAR INDEX

	1989	1990	1991	1992	1993
EXPECTATIONS FOR 2001					
All cars unleaded	x				
Petrol sold in litres	x				
Cars banned from city centres	x			x	
Road signs in kilometres	x				
London traffic at walking pace	x				
Most households will have 2 cars	x				
Speed limit raised to 100 mph	x				
Cars will run on electricity	x				
Cars will be computer controlled	x				
M25 will have 4 lanes		x			
Tolls on motorways		x		x	x
Cannot drive into city centres		x			
No car with engine over 2000cc		x	x		
Fax standard in cars		x		x	
Channel Tunnel not completed		x	x		
Cars limited to 70 mph		x			
Tax on petrol rises above inflation			x		
Road fund rises above inflation			x		
No tax advantage for co. car			x	x	x
Speed limited to 80 mph			x		
Electric cars for town driving			x		
On board direction computers			x	x	
Public transport improved locally			x		
Public transport improved nationally			x		
Drive on right			x		
Motorway limit reduced to 60 mph			x		
BR will be privatised				x	
Pay extra to drive into cities				x	
Single highway code in Europe				x	
Tax doubled to encourage economy				x	
Over 65's banned from driving				x	
Multistorey parking on streets				x	
Maximum 1 car per household				x	
Probation for new drivers					x
Airbags will be standard					x
One lane for lorries					x
Second M25					x
Lorries fitted with noise reduction					x
Viable alternative fuel to petrol					x
Work at home via computer					x
Supermarkets will sell new cars					x
All speed limits in Europe reduced by 10 mph					x
EC bans company cars					x



SOURCES AND ACKNOWLEDGEMENTS

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Lex Report on Motoring 1993 - The Company View.

Lex Service PLC, London, February 1993



LEX SERVICE PLC

Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange with annual sales exceeding £1 billion.

Lex Service is the leading retailer of passenger cars, vans and trucks in the UK, with nearly 90 outlets representing over 20 franchises. In addition, Lex has a joint venture car retailing operation in the US.

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

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

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

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

Lex Vehicle Leasing provides full service contract hire for passenger cars and light vans. It is the largest specialist contract hire company in the UK with a fleet of 53,000 vehicles representing most makes of cars and vans. This company is jointly owned by Lex Service and Lombard North Central, the finance subsidiary of National Westminster Bank.

Lex and Lombard also jointly own **Transfleet** and **Harvey Plant** which provide contract hire of commercial vehicles and fork trucks. **Seltra** offers contract hire of trucks in France. Other Lex businesses include **Lex Systems Leasing** which leases personal computers and **Lex Industrial Systems** which provides warehouse management systems.

Enquiries: David Leibling, Lex Service PLC, 071-723 1212 January 1993