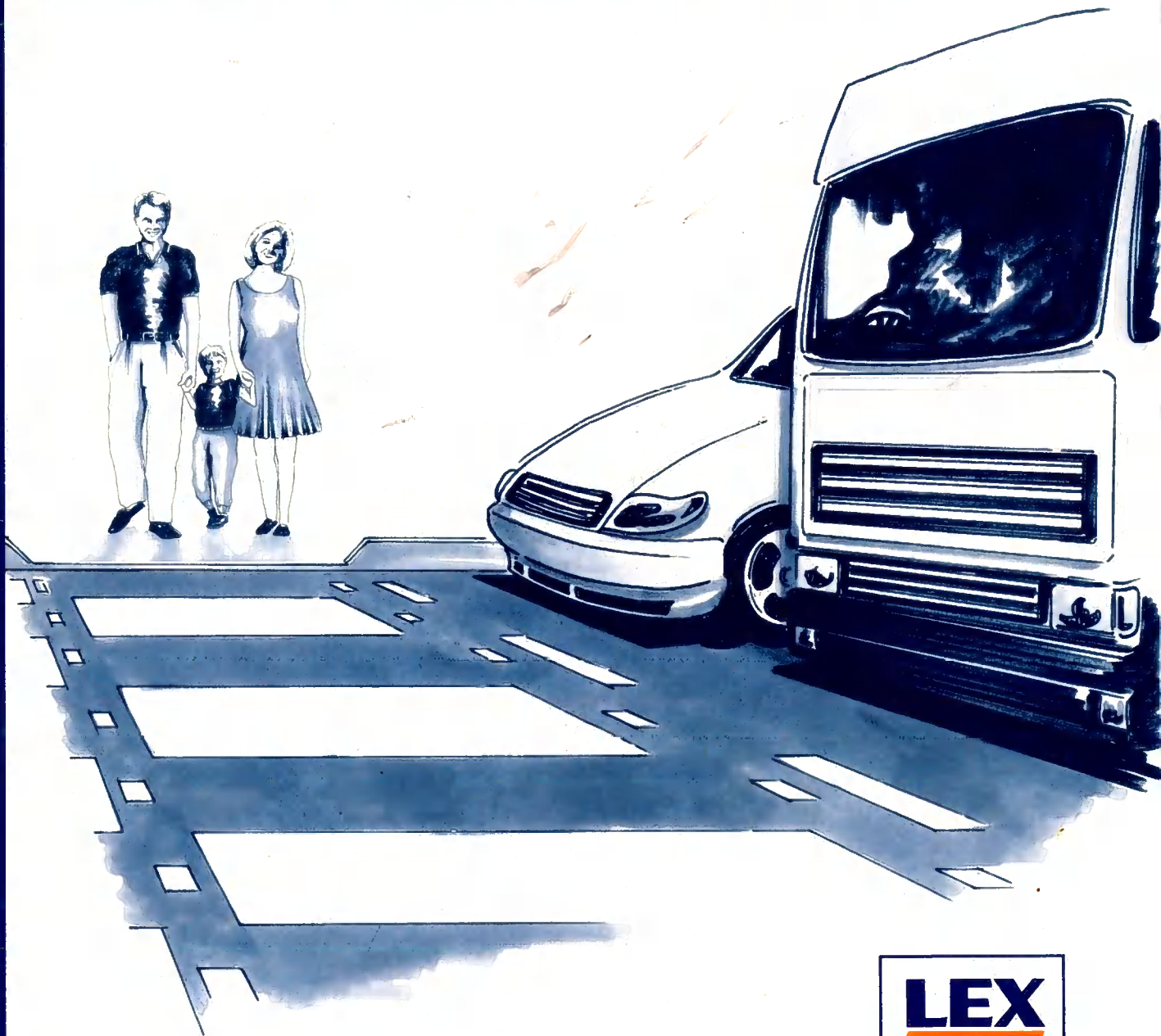


1996

Lex Report on Motoring

Listening to all Road Users



LEX SERVICE PLC

Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange. Annual sales exceed £1.4 billion, placing it in the top 150 UK quoted companies ranked by sales. Lex has 10,000 employees.

Lex is focused on the sales, servicing and contract hire of cars, trucks and lift trucks and on vehicle importing. For private motorists, Lex's aim is to provide trustworthy, value for money motoring services. For commercial and industrial customers Lex's goal is to provide transport and mechanical handling services to help their businesses to run more efficiently and more profitably. In both cases Lex will achieve these aims by understanding the needs of its customers and through the commitment of its employees to delivering an outstanding quality of service.

Lex Retail is the leading retailer of passenger cars in the UK, with outlets representing most franchises. In addition, Lex has a joint venture car retailing operation in France.

Lex Autocentres is a chain of specialist service centres providing servicing and repairs for cars of all makes and age. Lex Autosales is a growing network of specialist all-makes used car centres offering a wide selection of three to five year old cars at fixed prices. Lex Bodycentres provide accident repairs for all makes of car.

Lex Vehicle Leasing provides full service contract hire for passenger cars and light vans. It is the leading specialist contract hire company in the UK with a fleet of over 69,000 vehicles representing most makes of cars and vans. It is jointly owned with Lombard North Central.

Lex has a controlling interest in Hyundai Car (UK) which imports and distributes Hyundai cars in the UK, through a network of 150 dealers.

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Lex provides contract hire and servicing of lift trucks in the UK through Lex Harvey, SNEM and Manufleet in France. Lex also imports and sells Komatsu and Daewoo lift trucks.

Enquiries: David Leibling, Lex Service PLC (0171) 705 1212 January 1996

1996 Lex Report on Motoring

Listening to *all* road users



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FOREWORD BY THE SECRETARY OF STATE FOR TRANSPORT

I am pleased to welcome the eighth Lex Report on Motoring, which continues to provide a valuable insight into the issues which currently concern motorists, and represents a useful contribution to the transport debate.

The information contained within the report seems, to a large extent, to reflect the messages we have received during the transport debate - that we are seeing a shift in public opinion away from road based solutions towards less environmentally damaging alternatives. Motorists as well as non-car users seem to be increasingly aware of the need for restraint measures, such as pedestrianisation.

However, the report clearly illustrates the true depth of the problem and the reasons why the transport debate is needed: people are very attached to their cars and believe that their lifestyles depend on them. This may be true to some extent, but for many journeys, especially shorter, local ones, alternatives already exist. One of the major challenges we face therefore, is to try to find ways of exploiting these alternatives more fully.

I would like to congratulate the Lex Group for producing yet another useful report. I hope that they will continue with the important work they are doing.

SIR GEORGE YOUNG Bt

Introduction—

The 1996 Lex Report on Motoring

In this, the eighth Lex Report on Motoring, we have used our annual survey of motorists, specially conducted for us by MORI, to address the key questions about the future of transport policy in the UK. To help in this debate we recognised that it was not enough just to talk to car drivers. We needed to talk to industry, to transport professionals and importantly, to non-drivers. With each of these groups we have examined their transport needs and priorities and the changes they support and oppose.

The major part of the report focuses on the transport policy debate, starting with a profile of different road users and examining their reliance on the car and other forms of transport. We then look at their views on the choices available in transport policy. We hope that by presenting this research in a statistical and analytical form we can provide a rational view of the alternatives, even though they may not be acceptable to everyone.

Moving closer to our own industry we have also looked at another major area of concern for drivers - their experiences in buying and running a car and their views on the quality of manufacturers, dealers and servicing locations.

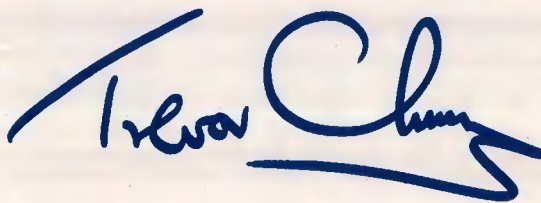
We have continued our practice of measuring a wide range of issues related to motoring which are of concern to all of us involved in the manufacture, distribution and retailing of cars and also to policy makers and legislators. These are included in the statistical tables in the second half of this report which reinforce the value of the Lex Report on Motoring as the prime source of data on motorists in the UK. As usual we will be publishing the second volume of the Lex Report on Motoring covering company cars later in the year in conjunction with our jointly-owned leasing company, Lex Vehicle Leasing.

There is no simple answer to the dilemma of how to provide more capacity for motorists to enjoy the freedom provided by the car while controlling the congestion and pollution that the car can cause. It is impossible to envisage the increase in public transport that would be required to replicate the flexibility and

convenience of the private car. More importantly it is vital that we continue to develop the infrastructure to support the movement of goods around the country by truck as cheaply and flexibly as we do today. As living standards rise, the demand for cars *will* continue to rise and we cannot put our head in the sand and wish that it would stop. We can improve the conditions in our towns and cities through pedestrianisation and the building of bypasses which are safe, economically sound and environmentally friendly. We can ensure that our cars and trucks are modern, well maintained and fuel efficient to minimise pollution.

We in Lex are concerned to ensure that the voice of the responsible road user, whether a private motorist or an industrialist, is heard. We also wish to ensure that when customers buy a car or a truck or have it serviced they are handled with courtesy and efficiency. We find the information from the Lex Report on Motoring vital to this task. We hope by making the report widely available to the entire industry it will help to raise the standards for all of us.

I hope you find the report helpful and useful.

A handwritten signature in blue ink, reading 'Trevor Chinn', with a stylized flourish at the end.

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

Basis of the research

The 1996 Lex Report on Motoring presents the analysis of three pieces of market research specially conducted for Lex Service by MORI:

1. Survey of car drivers: MORI interviewed a representative quota sample of 1,229 drivers in 102 constituency points throughout Great Britain. Drivers were defined as those driving at least once a month. The sample of those with their own company car was boosted to 311 to provide a robust sample for analysis. Data were then weighted to match the known profile of drivers in Britain. All interviews were conducted face-to-face between 1 October and 19 October 1995.

2. Survey of non-drivers: In order to understand the needs of all road users a separate research study was undertaken examining the needs and attitudes of non-drivers (including "occasional drivers", those who drive less than once a month). A representative sample of 717 non-drivers were interviewed face-to-face between 4 October and 9 October 1995.

3. Survey of Captains of Industry: The other main road user, apart from the general public, is industry. In order to understand its views and needs with respect to transport issues, research was conducted amongst Chairmen, Managing Directors, Chief Executives and other main board directors of Britain's 500 largest companies, using MORI's annual Captains of Industry survey. 113 interviews were conducted face-to-face between 17 July and 19 September 1995.

In addition to these three pieces of research, undertaken by MORI, Lex Service asked some of its largest customers to provide their views on transport issues, in order to understand the views of transport professionals. The views of 58 transport professionals (mostly fleet managers and finance directors) were examined via a self-completion questionnaire. These respondents represented fleets of 43,000 cars, 5,000 trucks and 2,000 lift trucks.

Terms

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

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

Where the term "spontaneous" appears on charts or tables, this indicates that respondents' answers were not prompted in any way.

Statistical reliability and definitions

The appendix gives details of the statistical reliability of the research and definitions and should be consulted for more information. "Don't know" responses are not shown in the report unless this was a significant and/or meaningful response. Where comparisons are being made between different samples, answers have been repercentaged excluding "don't knows" in order to give directly comparable results.

Summary of the research findings

Listening to *all* road users

"The car gives me freedom and control over my life"

The huge increase in the mobility of the population over the course of the last 40 years can be attributed to the car. Travel by car has grown tenfold and now accounts for 87% of all passenger miles in Great Britain.

Many motorists feel they have little alternative to the car, particularly older people and people living in more rural areas. Drivers feel that the loss of their car would have a serious impact on their lives, both practically and in curtailing their freedom.

Non-drivers, particularly those for whom there is a car in the household, are also reliant on the car for many of their journeys - three-quarters of the miles they travel are by car. Even in non-driver households *without* a car over 40% of people's travel is still done by car.

Industry is also reliant on road travel for its efficient functioning. Overall, 32% of all car miles are done in the course of work, with nearly half of those who make car journeys for work saying it is their only option. Four in ten of the working population say the loss of the car would affect their ability to carry out their work.

Road haulage also accounts for most goods transported around Great Britain, including over 90% of manufactured goods.

Against this backdrop of widespread reliance on the car and truck, this year's Lex Report on Motoring examines the advantages of road travel and the problems it creates and then identifies the policy options that receive the widest support amongst drivers, non-drivers and industry.

"The traffic on the roads is awful and I'm conscious of environmental issues"

Whilst the car brings freedom to many, drivers and non-drivers alike agree on the problems that cars and lorries create. Air pollution, congestion and the safety of pedestrians and cyclists are at the top of many people's list of concerns.

Congestion is a serious local problem for over half of motorists, particularly for those who live in cities. Despite this, most drivers would put up with congestion getting much worse before they would change their travel patterns.

Motorists are worried about other people's driving behaviour and nearly three-quarters of people have been the victim of road-rage at some time. Last year just under two million people were forced off the road by other drivers.

There is wide support among the general public for the aims of recent protests about building roads in the countryside and traffic congestion in cities, although there is little support for the methods of protesting.

Having established the areas of major concern; drivers, non-drivers, Captains of Industry and transport professionals were asked about their priorities for transport policy change.

“Better and cheaper public transport for all”

Perhaps surprisingly, there was a similar balance of opinion amongst drivers and non-drivers about the changes they would like to see happen in transport policy: an improvement in public transport provision whilst reducing fares, an increase in pedestrianisation, more park and ride schemes, more cycle lanes and a reduction in speed limits in residential areas. Many believe these changes would benefit them personally but also help the environment.

There is significant net positive support amongst drivers for building more town and city bypasses, but net opposition amongst both groups for building new motorways and trunk roads and the introduction of road-pricing.

“It’s cheaper and faster for trucks to use toll lanes on motorways”

Whilst many of Britain’s industrial leaders and transport professionals also want improved public transport and more park and ride schemes, they are also looking for improvements in the road infrastructure and would welcome road charging as a means of increasing the speed of road travel.

“The thrill of buying a new car and the pride of ownership”

The report addresses the key issues for drivers in buying and running a car and the quality of manufacturers, dealers and service locations.

Motorists believe manufacturers have improved in nearly every respect over the past ten years, particularly in car safety, handling, performance and comfort. The area of least perceived improvement has been in providing value-for-money.

Most motorists who buy a car through a dealer find the overall experience satisfactory, although nearly four in ten experience some problems, particularly with after-sales care and the attitudes and techniques of sales-people. Around half of those people who experienced problems complained or decided to use another dealership next time. The level of trust in dealers has, however, risen substantially since 1989.

“I have faith in the garage, their reputation is on the line if they do not do a good job.”

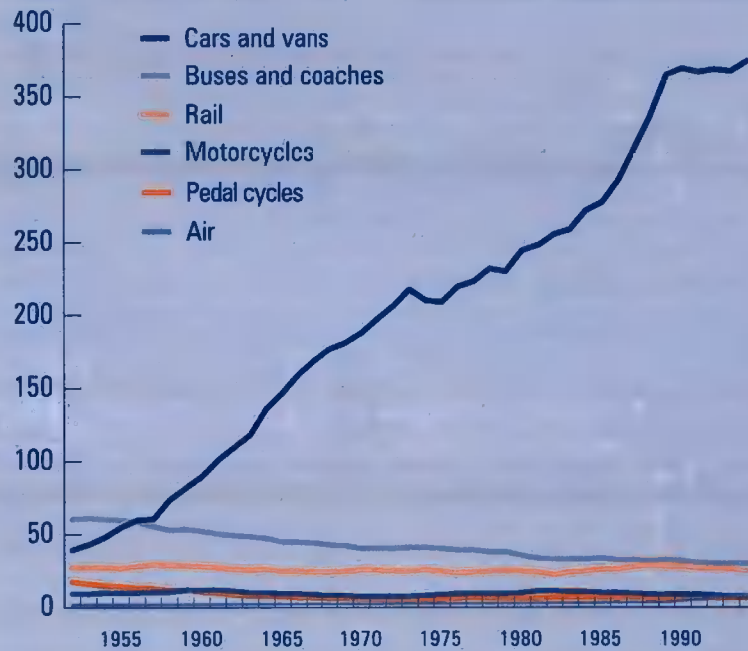
Overall satisfaction with the quality of servicing from garages and workshops has remained consistently high at around 85% over the past six years. Around three in ten, however, have been dissatisfied with some aspect of their servicing, often to do with price, the quality of the work or the punctuality of the work. Four in ten of those who are dissatisfied change their garage the next time they get their car serviced.

Key statistics for 1995

- New car sales in 1995 were 1.95 million, a 2% rise on the 1994 figure. The current levels are still only 85% of the 1989 peak of 2.3 million.
- Based on current drivers' expectations, car ownership will increase by 6% in two years' time, from 25.5 million to 27.1 million.
- Although fewer women buy cars, those that buy are more likely to buy new cars than men.
- Over a third of purchases of those over 55 years old are new cars.
- Diesel sales have fallen by 5% in the past year.
- Of the cars that run on petrol, 62% can now use unleaded fuel, rising from just 14% in 1988.

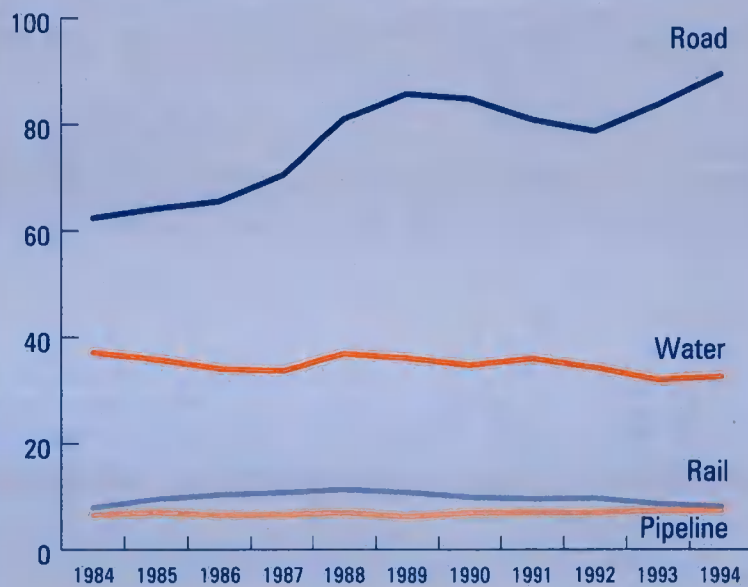
Listening to *all* road users

Figure 1.1 Passenger travel in Great Britain
Billion passenger miles by mode of transport



Source: Transport Statistics Great Britain 1995, The Department of Transport

Figure 1.2 The increasing reliance of industry on road usage
Billion tonne miles of freight traffic



Source: Transport Statistics Great Britain 1995, The Department of Transport

1 Travel patterns and reliance on the car

In the first section of the 1996 Lex Report on Motoring, the level of reliance on the car and road travel amongst different groups is analysed, looking at the overall travel patterns of drivers and non-drivers and the differences between demographic groups.

The level of reliance of industry on road travel is also examined, both in moving goods and in moving people around the country.

1.1 An overview of travel and road use in Britain

There has been a huge increase in the mobility of the population caused by growth in use of the car. Travel by car has grown tenfold over the past 40 years. The car now accounts for 87% of all passenger miles in Great Britain.

Industry has also become more reliant on road haulage, which now accounts for 65% of all goods moved in Britain and 92% of those goods carried over land, compared to 55% and 89% respectively in 1984.

This century has seen a phenomenal rise in the mobility of the population. For example, in 1952, the total passenger miles travelled in Britain was 136 billion. This had risen by 315% to 428 billion miles by 1994.

This increase in mobility has, in the second half of the century, been brought about by the car. In the last 40 years travel by car has risen tenfold, whilst bus travel has fallen by over half and rail travel by 10% (see figure 1.1.).

Many people are now reliant upon their cars and it has become an integral part of their lives.

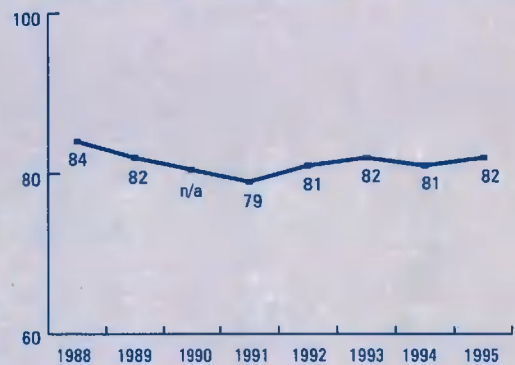
82% of motorists agree with the statement "I would find it very difficult to adjust my lifestyle to being without a car", a figure which has been consistently around this level for the past eight years (see figure 1.3.).

We are now a car-borne society:

- Travel by car now accounts for 87% of all passenger miles travelled in Great Britain, compared to 26% in 1952.
- Two-thirds of adults now have a driving licence, with others awaiting their tests.
- 74% of motorists and 49% of the total population drive every day or most days (see figure 1.4.).

There has also been an increase in the reliance of industry on road travel. For example, figure 1.2. illustrates how haulage patterns have changed over the past decade. There is now 11 times more haulage carried by road than by rail. Road haulage accounts for 92% of all freight moved over land and this figure excludes those goods moved by light vans.

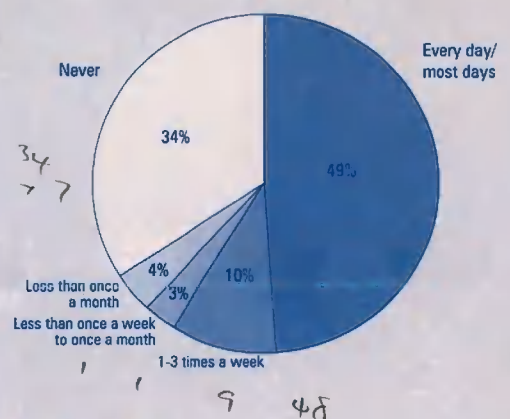
Figure 1.3 Reliance of drivers upon the car
% agreeing "I would find it difficult to adjust my lifestyle to being without a car"



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 1.4 Frequency of driving among the whole population
%



Base: All adults (1876)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

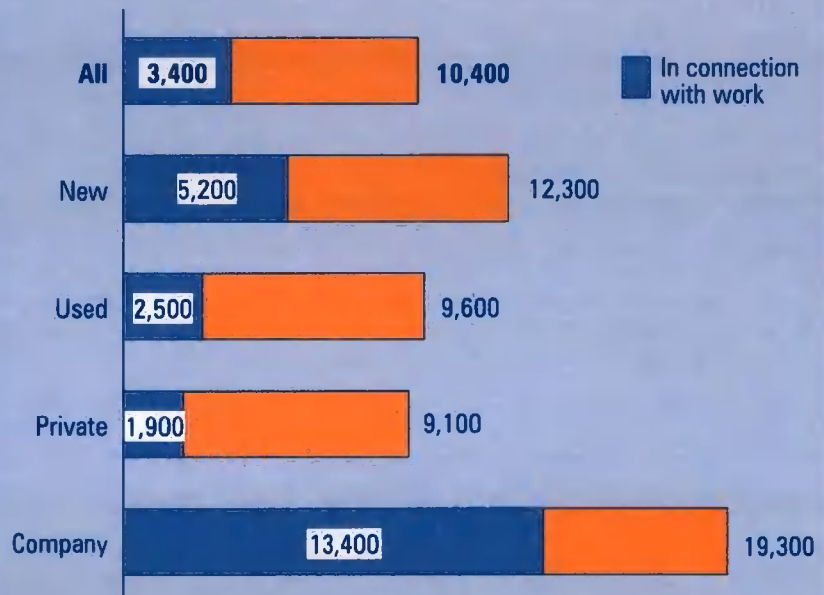
Figure 1.5 Mileage by demographic group
Total miles driven per annum



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 1.6 Business and private mileage
Miles driven per annum



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

1.2 The reliance of drivers on the car

As this and previous Lex Reports have consistently shown, drivers are heavily reliant on their cars. This is reflected in their attitudes, the miles they travel by car and the proportion of their journeys made by car. Many motorists feel they have little alternative to the car, particularly older people and people living in more rural areas. Drivers feel that the loss of their car would have a serious impact on their lives, both practically and in curtailing their freedom.

The reliance of driving households on their cars can be measured in a number of ways: how many miles they are driving, what options they feel they have in terms of other forms of transport and how psychologically dependent they feel on the car.

Mileage

The mileage that people say they drive has remained reasonably constant over the eight years of the Lex Report on Motoring, at around 10,000 miles per annum per car (see figure 1.7.).

Whilst average car mileage has remained static, an increasing number of households have more than one car. This increase in multicar households implies that the total mileage driven by members of an average household rose by 7% between 1988 and 1995.

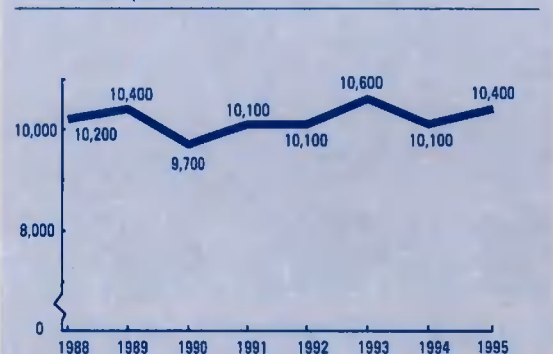
Not all drivers and households travel the same amount however (see figure 1.5.).

Those driving the most are men, people living in more rural areas and professionals.

Those driving the least are older people, women and manual workers.

In figure 1.6. it can be seen that people with new and company cars drive significantly further in their cars, with many of these miles on work-related journeys.

Figure 1.7 Average miles driven
Miles driven per annum



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Reliance on the car for different journeys

The reliance of drivers on their cars is not just for specific journeys, but across all journey types. Figure 1.8. shows which mode of transport drivers normally use for the main part of different journeys. On all journey types over 85% normally used the car, with, for example, 96% normally using the car for grocery shopping.

In all the cases, except travel to or from work, over two-thirds of those using the car said they did have other travel options. 40% of those using the car to get to and from work said they had no other option. The reliance of drivers on the car in their work life is examined in section 1.4.

Responses to this question were examined by demographic group. This revealed that those demographic groups that, on average, drive relatively few miles are as dependent on the car as high-mileage groups, i.e. they may be travelling less, but, for those journeys they do make, use of the car is just as high.

A key example of this is older drivers, who do a lot less mileage than other groups (see figure 1.9.). They are one of the most dependent groups on the car; 98% normally use the car for visiting friends and relations and 97% of them use the car for grocery shopping. One third of older drivers said they had no other option for these journeys than to use their car.

People living in the country are another group for whom the car is often the only option: 58% said the car was the only option for getting to and from work, 42% the only option for visiting family and friends and 44% the only option for grocery shopping.

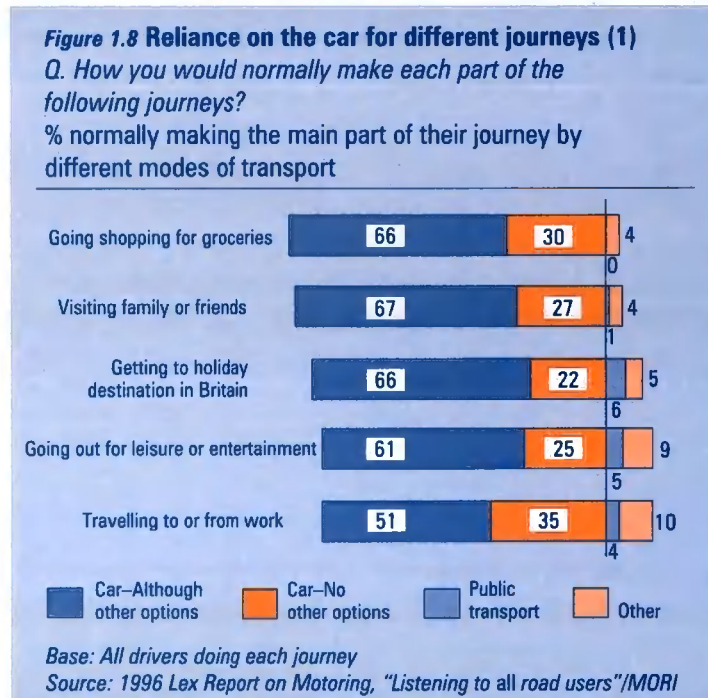


Figure 1.9. Reliance on the car for different journeys(2)

% normally making the main part of their journey by different modes of transport

| TRAVELLING TO OR FROM WORK | | | |
|-----------------------------------|---|----------------------------------|--------------|
| | Car - although other options | Car - no other option | Other |
| All | 51 | 35 | 15 |
| Male | 52 | 33 | 15 |
| Female | 48 | 37 | 15 |
| Country dwellers | 34 | 58 | 8 |
| City dwellers | 63 | 20 | 16 |
| Professionals (AB's) | 49 | 40 | 11 |
| Manual workers (C2's) | 54 | 30 | 17 |
| Households with children | 51 | 34 | 15 |
| Households without children | 50 | 35 | 15 |
| Young people (17-24) | 48 | 24 | 27 |
| Older people (65+)* | — | — | — |

| VISITING FAMILY AND FRIENDS | | | |
|------------------------------------|---|----------------------------------|--------------|
| | Car - although other options | Car - no other option | Other |
| All | 67 | 27 | 5 |
| Male | 67 | 28 | 5 |
| Female | 66 | 27 | 6 |
| Country dwellers | 52 | 42 | 6 |
| City dwellers | 75 | 20 | 5 |
| Professionals (AB's) | 68 | 30 | 3 |
| Manual workers (C2's) | 66 | 27 | 6 |
| Households with children | 68 | 26 | 6 |
| Households without children | 66 | 28 | 5 |
| Young people (17-24) | 64 | 24 | 12 |
| Older people (65+) | 65 | 33 | 2 |

| GOING SHOPPING FOR GROCERIES | | | |
|-------------------------------------|---|----------------------------------|--------------|
| | Car - although other options | Car - no other option | Other |
| All | 66 | 30 | 4 |
| Male | 68 | 28 | 4 |
| Female | 62 | 33 | 5 |
| Country dwellers | 52 | 44 | 5 |
| City dwellers | 73 | 21 | 6 |
| Professionals (AB's) | 63 | 33 | 4 |
| Manual workers (C2's) | 66 | 30 | 4 |
| Households with children | 65 | 31 | 4 |
| Households without children | 66 | 29 | 5 |
| Young people (17-24) | 64 | 27 | 9 |
| Older people (65+) | 64 | 33 | 3 |

* = Base too small

Base: All drivers doing each journey

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Psychological dependence on the car

Not surprisingly, given the figures above, drivers believe that the loss of their car would seriously disrupt their lives (see figure 1.10.). 67% believe that they would lose the general sense of freedom that comes from having a car and this was a widely held belief amongst all the demographic groups. Over half of drivers believed the loss of the car would impact upon shopping patterns and visiting friends and relations.

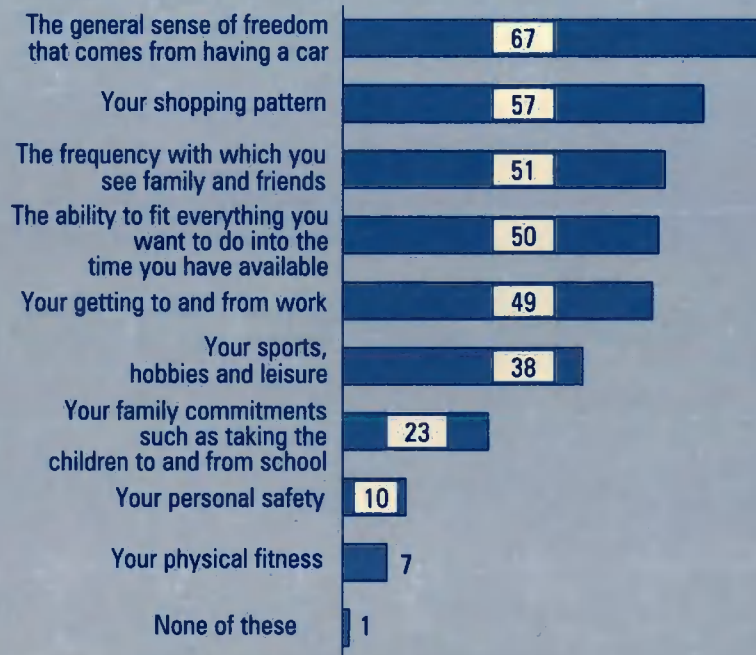
More drivers with children felt that the loss of their car would seriously disrupt their family commitments.

Perhaps surprisingly, only one in five women felt the loss of their car would impact upon their personal safety.

More young people felt the loss of their car would hit their leisure patterns. The young people interviewed, however, did use other forms of transport more often than other groups. This may be because a number of them are still living with their parents and may rely on being given access to their parents' car (72% of the 17-24 year-olds interviewed were still single).

Almost everybody felt the loss of their car would seriously disrupt their life in some way.

Figure 1.10 The impact of no longer having a car
 % believing each area would be seriously disrupted without a car



19
 16
 14
 14
 14
 11
 7
 3
 352

Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Driver profiles

The profile of drivers is skewed in a number of ways (see figures 1.11. and 1.12.). The demographic groups that are most likely to be drivers are men, the middle-aged and those in professional groups. Those less likely to be drivers are women (although this is predominantly older women), the young and the old and those in manual jobs or unemployed.

- Nearly six in ten drivers are male (15.4 million drivers)
- Over two thirds of drivers are aged between 25 and 54 (17.5 million drivers)
- Six in ten drivers are ABC1 social groups (15.7 million drivers)

The relatively low proportion of young people that are drivers reflects the numbers that have yet to take their test, as will be examined in section 1.3. The number of older people who are drivers will rise as the middle age cohort take their driving habits (and driving licences) into older age.

No. of men drivers by age:

| | |
|--------------|---------------------|
| 17-24 | 1.7 million |
| 25-34 | 4.2 million |
| 35-54 | 5.7 million |
| 55-64 | 1.7 million |
| 65+ | 2.2 million |
| Total | 15.4 million |

No. of women drivers by age:

| | |
|--------------|---------------------|
| 17-24 | 0.9 million |
| 25-34 | 3.3 million |
| 35-54 | 4.4 million |
| 55-64 | 1.4 million |
| 65+ | 0.7 million |
| Total | 10.7 million |

Figure 1.11 Profile of Britain's Drivers (1)

%

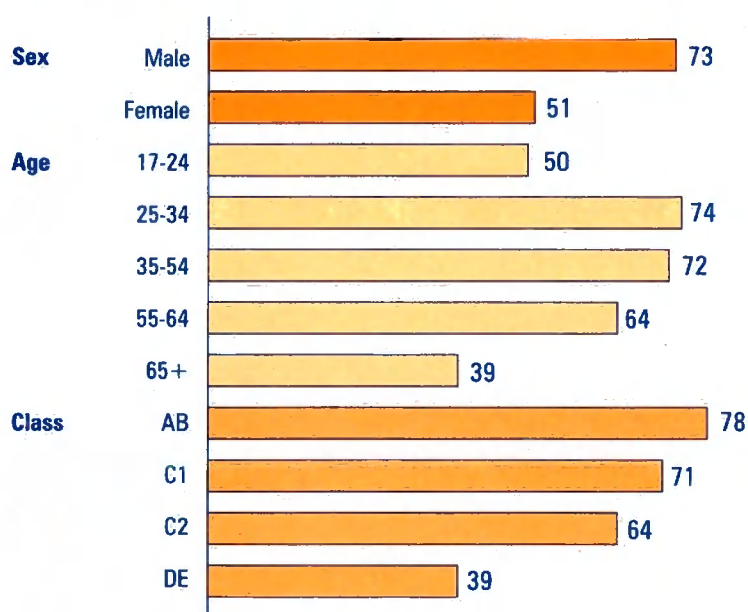
| | | General public | Drivers |
|--------------|--------|----------------|---------|
| | | % | % |
| Sex | Male | 48 | 59 |
| | Female | 52 | 41 |
| Age | 17-24 | 21 | 10 |
| | 25-34 | 33 | 28 |
| | 35-54 | 12 | 39 |
| | 55-64 | 20 | 12 |
| | 65+ | 21 | 11 |
| Class | AB | 21 | 29 |
| | C1 | 27 | 31 |
| | C2 | 23 | 24 |
| | DE | 29 | 16 |

Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 1.12 Profile of Britain's Drivers (2)

% of each group that are drivers



Base: All adults (1876)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 1.13. Reasons do not drive/drive more
 % (Reasons given by more than 5% of non-drivers)

| | All | Occasional drivers | Non-drivers with car in household | Non-drivers with no car in household |
|---|-----|--------------------|-----------------------------------|--------------------------------------|
| Driven by other person | | | | |
| Member of household | 17 | 21 | 38 | 3 |
| Another relative | 9 | 8 | 8 | 10 |
| Friend/colleague | 12 | 16 | 13 | 10 |
| Physically unable | | | | |
| Used to drive, now too old | 7 | 5 | 4 | 9 |
| Illness/disability, prevents me driving | 11 | 17 | 7 | 13 |
| Licence related | | | | |
| Learnt how to drive but never taken/failed test | 12 | 5 | 17 | 10 |
| Never learnt how to drive | 45 | 3 | 53 | 47 |
| Cost | | | | |
| Cost/cannot afford to run a car | 23 | 43 | 13 | 24 |
| Principle | | | | |
| Do not see need to drive | 13 | 22 | 12 | 11 |
| Pleasure | | | | |
| Do not enjoy driving | 10 | 19 | 13 | 6 |
| Prefer other mode of transport | | | | |
| Prefer public transport | 9 | 17 | 7 | 9 |

Base: All non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

1.3 The reliance of non-drivers on the car

Non-drivers, particularly those for whom there is a car in the household, are reliant on the car for many of their journeys. Overall two-thirds of non-drivers travel in a car at least once a week.

In non-driver households where there is a car, around half say they do not drive because there is someone who drives them around. Three-quarters of their travel is done by car.

In non-driver households where there are no cars, nearly a quarter do not drive because of the cost of running a car. For this group over 40% of their travel is still done by car, with a similar proportion accounted for by public transport.

In order to get a balanced view of the needs of the whole population, a sample of non-drivers were asked about their travel patterns and their views on transport policy options. In this section their reliance on the car is examined.

The sample of "non-drivers" included those who drove, but less than once a month - this group was 4% of the whole population and 10% of the sample of non-drivers. The rest of the sample did not drive at all.

Reasons for not driving

Non-drivers and occasional drivers (those who drive less than once a month) were asked why they did not drive, with the responses analysed by whether respondents were occasional drivers (10% or 1.6 million people), non-drivers with a car in the household (33% or 5.4 million people) or non-drivers without a car in the household (57% or 9.3 million people) (see figure 1.13.).

43% of occasional drivers said they did not drive more because of the cost, with other common reasons being: not seeing the need, being driven round by others, not enjoying driving, illness or disability preventing them, or preferring public transport.

The predominant reasons amongst non-drivers with a car in the household were never having learnt and being driven around by others. 38% stated it was because they were driven around by another member of the household.

Non-drivers without access to a car were most likely to say it was because of never having learnt or because of the cost.

| | |
|---|---------------------|
| Regular drivers | 26.1 million |
| Occasional drivers | 1.6 million |
| Non-drivers with a car in the household | 5.4 million |
| Non-drivers without a car in the household | 9.3 million |
| Total number of adults (age 17+) | 42.4 million |

The responses differed significantly within different demographic groups.

- Men are more likely than women to say it is because they are too old now, or have an illness/disability preventing them.
- Women are more likely to say it is because they are driven around by other members of the household, friends or colleagues or because they never learnt to drive, particularly older women.
- AB's are more likely to say it is because they are driven around by someone else or because of a matter of principle.
- Those with children are more likely to say it is because they are driven around by someone else.
- Young people are more likely to say it is because they are driven around by someone else, because they do not have a driving licence or because they cannot afford it.
- Older people are more likely to say it is because they are no longer physically able to drive.

Frequency of travel by car

When asked about how often they were passengers in a car, only 5% of non-drivers said they were never passengers. Two-thirds of the sample said they were passengers in a car at least once a week, with nearly a quarter saying they were a passenger every day or most days (see figure 1.14.).

Obviously these figures differ significantly depending on whether there is a car in the house. Where there is a car in the house, people are likely to be passengers twice as often as those in households without a car (see figure 1.15.).

Data from the National Travel Survey, published in September 1995, support this finding. In households with a car, 76% of miles travelled by non-drivers are by car (for journeys over one mile), compared to 90% of travel for the main driver in the household. In households without a car, 42% of all travel is still done by car, with 9% of travel done on foot and 42% by public transport.

Young non-drivers and non-drivers with children, on average, are passengers in a car more often than other groups, reflecting the likelihood of there being a driver in the house.

Non-drivers in more rural areas also do a high number of journeys by car, reflecting the relatively poor public transport options in many rural locations.

Non-driving men and older people do the least journeys by car, with the likelihood of their spouses being driving licence holders lower for these groups.

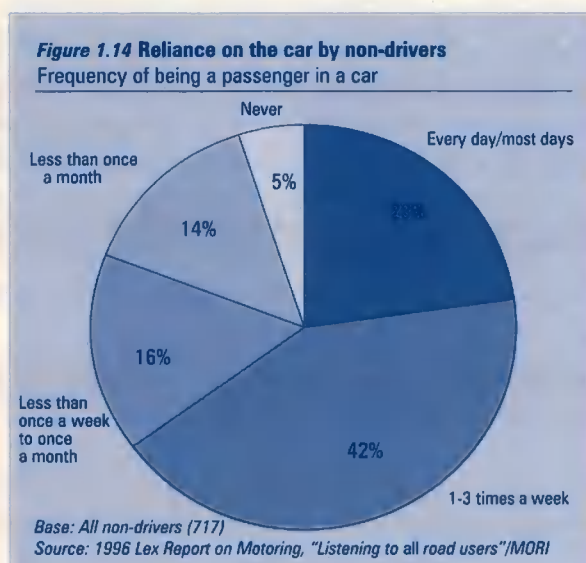
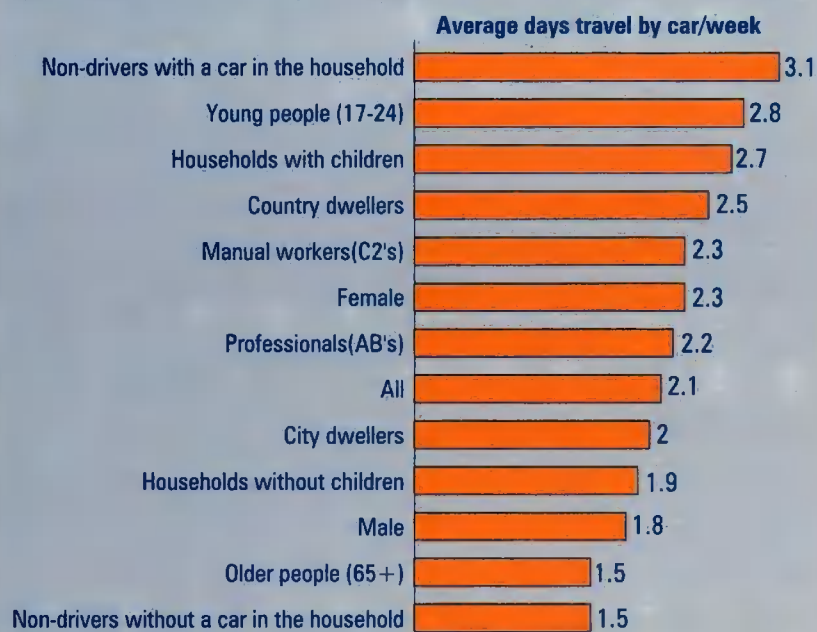


Figure 1.15 Reliance on the car for different groups of non-drivers
Frequency of using a car



Base: All non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Profile of non-drivers

The profile of non-drivers is in contrast to the skew seen amongst drivers (see section 1.2.). More non-drivers are women (10.9 million), a third of non-drivers are over 65 years old (5.4 million) and nearly half are DE social class (7.5 million), who are mostly unemployed or pensioners (see figures 1.16. and 1.17.).

Although, on average, women are more likely to be non-drivers than men, previous Lex research and evidence from the National Travel Surveys shows that women under 50 are almost as likely as men of the same age to be drivers, whereas women over 50 are about half as likely as men of the same age to be drivers.

Figure 1.16 Profile of Britain's non-drivers (1)

%

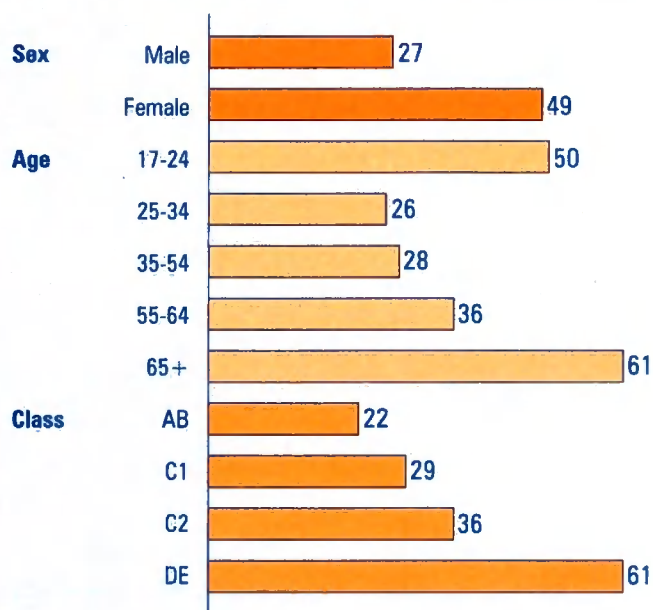
| | | General public % | Non-drivers % |
|--------------|--------|---------------------|------------------|
| Sex | Male | 48 | 33 |
| | Female | 52 | 67 |
| Age | 17-24 | 14 | 19 |
| | 25-34 | 21 | 13 |
| | 35-54 | 33 | 23 |
| | 55-64 | 12 | 12 |
| | 65+ | 20 | 33 |
| Class | AB | 21 | 11 |
| | C1 | 27 | 20 |
| | C2 | 23 | 23 |
| | DE | 29 | 46 |

Base: All non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 1.17 Profile of Britain's non-drivers (2)

% of each group that are non-drivers

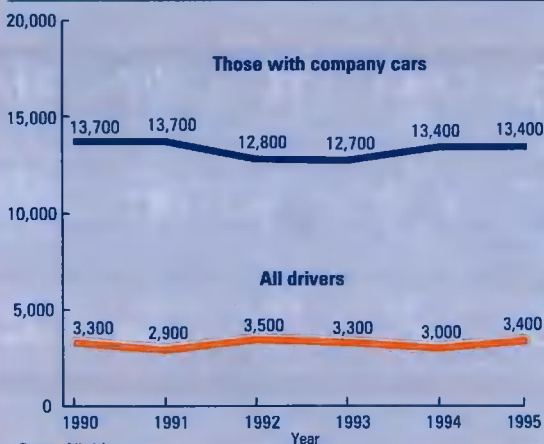


Base: All adults (1876)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

1.4 The reliance of industry on road travel

Figure 1.18 Mileage on work business
Average miles driven



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Industry is heavily reliant on road travel. Overall, 32% of all car miles are done in the course of work and 70% of all company car miles. Nearly half of drivers who make any work-related journeys by car say it is their only option and four in ten of the working population say the loss of the car would affect their ability to carry out their work.

Road haulage accounts for most tonnage transported around Great Britain, including over 90% of manufactured goods.

Industry is one of the main users of the road network in the UK. In this section the reliance of industry on road-travel is looked at from two perspectives; moving employees around the country and moving materials and finished products.

Reliance on the car in the workplace

32% of all miles travelled by drivers in Britain are on work-related travel. This is much higher for company car-drivers, for whom 70% of their mileage is related to work (see figure 1.18. and figure 1.6.).

Those drivers who undertake work-related travel, were asked what mode of transport they normally used for the main part of these journeys:

- 87% usually did the journey by car, with half of these saying there was no other option.
- 97% of company car drivers normally do these journeys by car, with just over half saying there was no other option.

It is not surprising, given these figures, that nearly 80% of company car drivers say their car is essential for their job, with a further 14% saying it is helpful to their job.

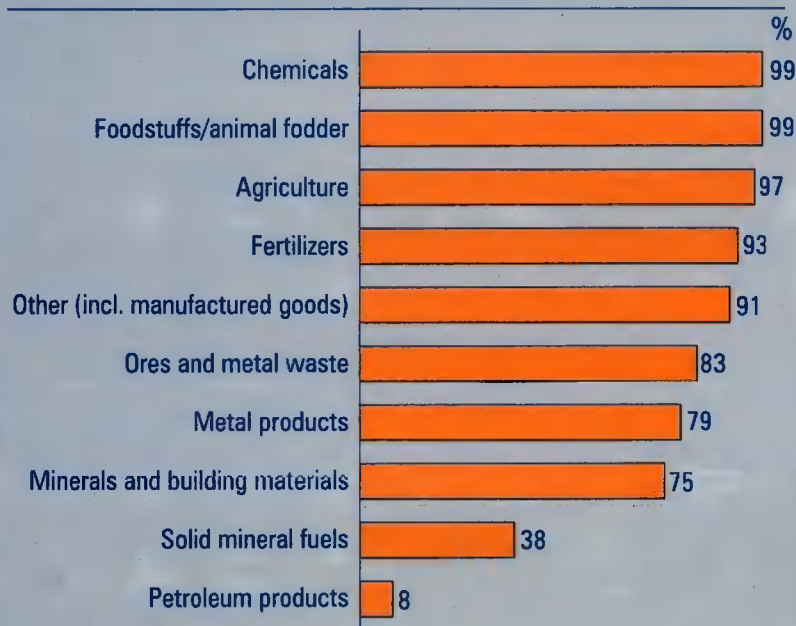
Drivers were asked whether losing their car would seriously disrupt their ability to carry out their work effectively. 43% of those in full-time work said it would, compared with 75% of company car drivers.

Reliance on road-travel for distribution

Industry also relies very heavily on travel by road to distribute goods around the country. In figure 1.19, we show the proportion of goods that travel by road across different sectors of industry.

In nearly all the sectors road travel accounts for the vast majority of the tonnage moved, including over 90% of manufactured goods. The only sectors where there is less reliance on road travel is in the transportation of solid mineral fuels and petroleum products, where in the former instance there is more reliance on rail and in the latter, reliance on water travel and pipeline.

Figure 1.19 The reliance of industry on road travel - by sector
% of all tonne miles moved by road (1994)



Source: Transport Statistics Great Britain 1995, The Department of Transport

2 The driving experience

In this section of the report the nature of driving in Britain is examined; what benefits it brings and what problems it creates. Three areas are looked at in detail; congestion, road-rage and speeding on Britain's roads.

2.1 The problems encountered on the roads of Britain

Whilst the car brings freedom to many, drivers and non-drivers alike agree on the problems that cars and lorries create. Air pollution, congestion and the safety of pedestrians and cyclists are at the top of many people's list of concerns.

Likes and dislikes of car ownership

When drivers were asked what they liked and disliked about owning a car in Britain, the vast majority of likes related to the freedom the car brings.

Some examples of typical responses are:

"The car gives me freedom and control over my life and the ability to get to places that public transport cannot reach" Female, 55-64

"I can instantly respond to what I decide to do - no need to plan or take any wet weather clothes" Male, 45-54

"The independence a car gives you" Female, 17-24

When asked about the dislikes about driving and owning a car, nearly half the comments related to the costs of keeping a car on the road.

For example:

"Insurance and road tax is going up. It wouldn't be so bad if the money went back into the roads, but it is used for anything and is just another form of taxation" Male, 35-44

"I object to paying road tax and excessive insurance due to bad drivers and theft problems" Male, 45-54

But a great number of comments also related to traffic congestion and the behaviour of other drivers.

For example:

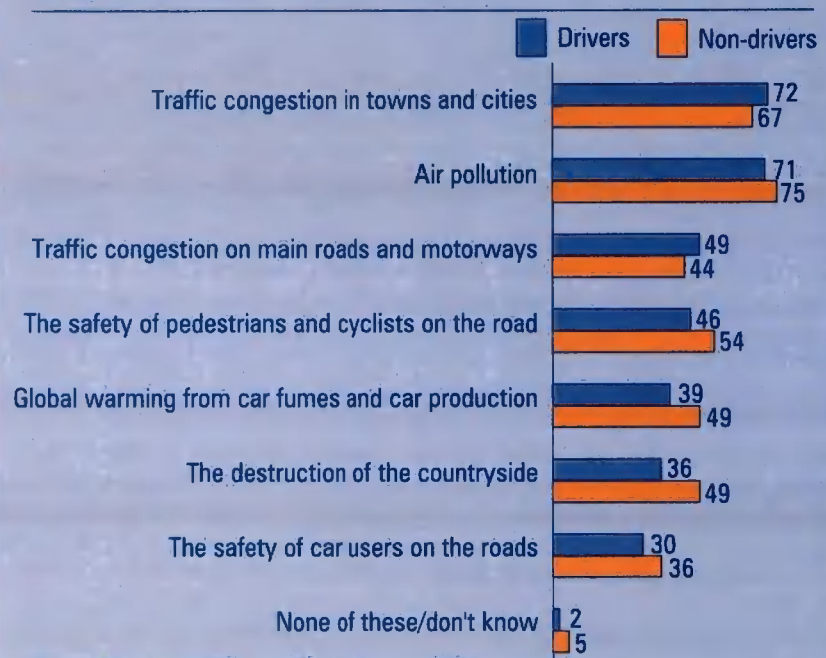
"The amount of traffic on the roads is terrible. People drive too fast and cut you up all the time" Female, 65+

"Traffic jams and road works are terrible" Male, 55-64

"The traffic on the roads is awful and I'm conscious of environmental issues" Female, 45-54

"I am very concerned about pollution and children's safety" Female, 25-34

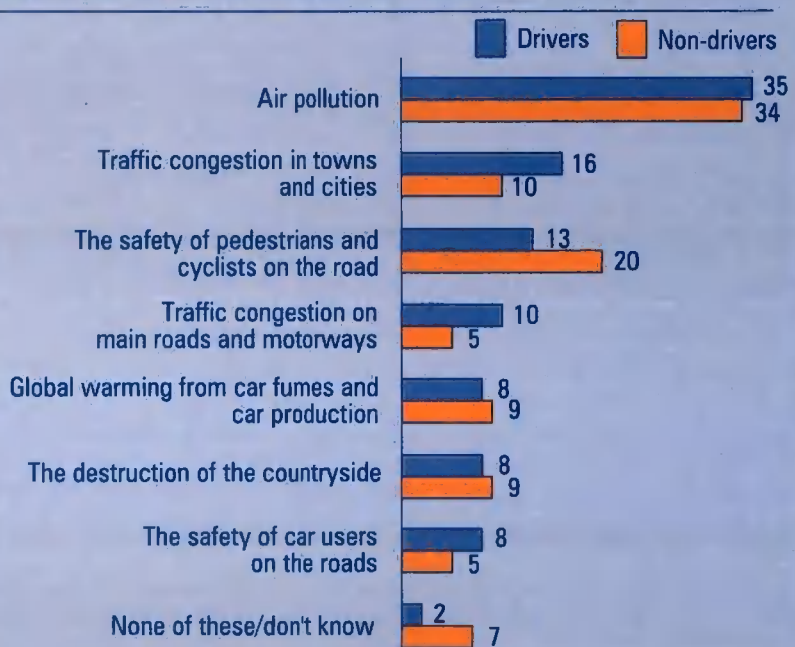
Figure 2.1. Concerns about road travel (1)
% agreeing issues are major problems



Base: Drivers (1229) and Non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 2.2. Concerns about road travel (2)
Issues people are most concerned about (%)



Base: Drivers (1229) and Non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Major problems associated with road-travel

The comments above are backed up by the quantitative data from the survey.

In figure 2.1. the numbers agreeing that different issues are major problems are shown. These questions were asked of both drivers and non-drivers.

On the list of problems for many drivers were traffic congestion in towns and air pollution. Of less widespread concern, but still important, were traffic congestion on motorways, the safety of pedestrians and cyclists and the impact on global warming of car fumes and car production. At the bottom of the list was safety of car-users, perhaps reflecting improvements in car safety (see section 4.1.).

The problems perceived by non-drivers were almost identical to those of drivers. 75% saw air pollution as a problem, whilst 67% saw traffic congestion in towns as a problem. More of them thought the safety of pedestrians and cyclists was a major problem, but overall the differences were small.

There was also very little difference in response between demographic groups, although more women than men thought the impact of the car on global warming was a major problem and more women were concerned about the safety of pedestrians and cyclists.

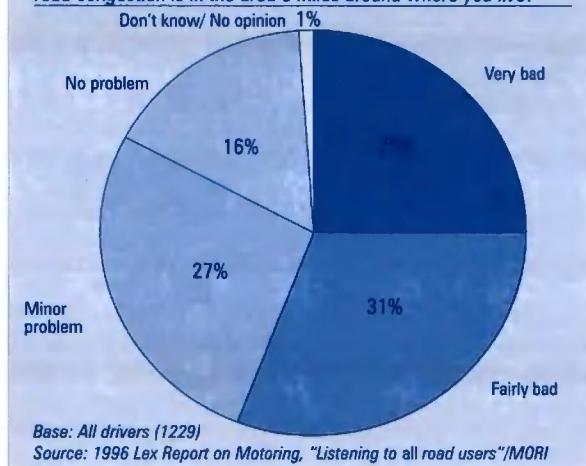
More younger (under 25's) than older people were concerned about the destruction of the countryside and the safety of pedestrians and cyclists.

Having established which areas were of concern, respondents were then asked which of these issues they were **most** concerned about (see figure 2.2.). Air pollution came top amongst both drivers and non-drivers. Traffic congestion in towns came second amongst drivers and safety of pedestrians and cyclists came second amongst non-drivers.

2.2 The problems of congestion

Figure 2.3 The problem of congestion (1)

Q. During peak times, how much of a problem would you say road congestion is in the area 5 miles around where you live?



Congestion is a serious local problem for over half of motorists, although it is worse for those who live in cities. Despite this, most drivers would put up with congestion getting much worse before they would change their travel patterns. They would also put up with the price of car-travel rising substantially and still use their car.

People believe congestion and the air pollution it can produce are major problems. In this section the extent of this problem is looked at, together with how much more drivers are willing to put up with.

Levels of local congestion

Although the problems of congestion and traffic are major concerns for people, only 25% of drivers say it is a very bad problem in the five miles around where they live, with a further 31% saying the problem is fairly bad (see figure 2.3.).

Not surprisingly, there are significant differences in the problems of congestion in different areas of the country (see figure 2.4.):

- 75% of city dwellers say that congestion is a problem in their area, compared to 58% of town dwellers and 33% of people who live in more rural areas.
- more people in the most built-up regions - London, the South-East and the North-West - believe congestion is a serious problem where they live, with fewer people saying it is a problem in the South-West and Wales and Scotland.

Figure 2.4 The problem of congestion (2)

Q. During peak times, how much of a problem would you say road congestion is in the area 5 miles around where you live?



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

The impact of further rises in congestion

Evidence from this survey suggests that despite concerns about congestion, it could get a lot worse before drivers start to seek alternative methods of transport (see figure 2.5).

Drivers were asked what their response would be if congestion doubled their travel time on a number of journey types. In five out of the six journey types over two-thirds said they would continue using their car. In connection with work, 82% said that they would continue using their car. Only in the case of going out for leisure/entertainment did over one-third say they would use other means of transport. On average only 2% of people would not do the journey or do the journey less often.

Those people for whom congestion is already a problem in their local area would be more likely to switch away from using their cars. For example, 63% of those for whom congestion locally is "very bad" would continue to use their car to get to and from work if congestion doubled, compared to 80% of those for whom congestion is currently not a problem.

To put this in context, between 1984 and 1994 the number of miles driven per mile of motorway grew by 62%. If this growth were repeated over the next ten years, few motorists would be put off using their cars, according to the results from this year's survey.

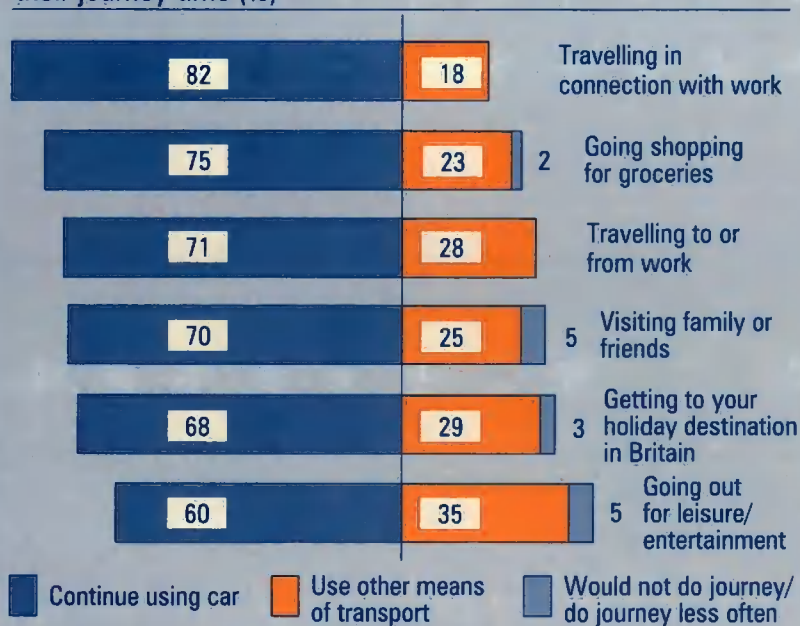
The impact of rises in the cost of driving

This reluctance to leave the car is also shown in the proportion who would leave their car at home if the relative price of going by car was to double (see figure 2.6.). Whilst more would use other means of transport than if congestion doubled, still over half would continue using their car across all the journey types. Seven in ten say they would continue to use a car to get to work and eight in ten say they would continue to use a car in connection with work.

Whilst most motorists say they would continue to use their car if prices rise, evidence from the 1994 Lex Report on Motoring showed that motorists are very resistant to price increases and if there is an alternative (car) option many drivers say they will take it. For example, if tolls were introduced on motorways at a level of 1.25 pence per mile, 37% of car traffic would switch to other toll-free roads, according to the 1993 survey results. If the toll charge was 3.75 pence per mile, 64% of traffic would switch.

Figure 2.5 Impact of further increases in congestion

What people would do if traffic congestion was to double their journey time (%)

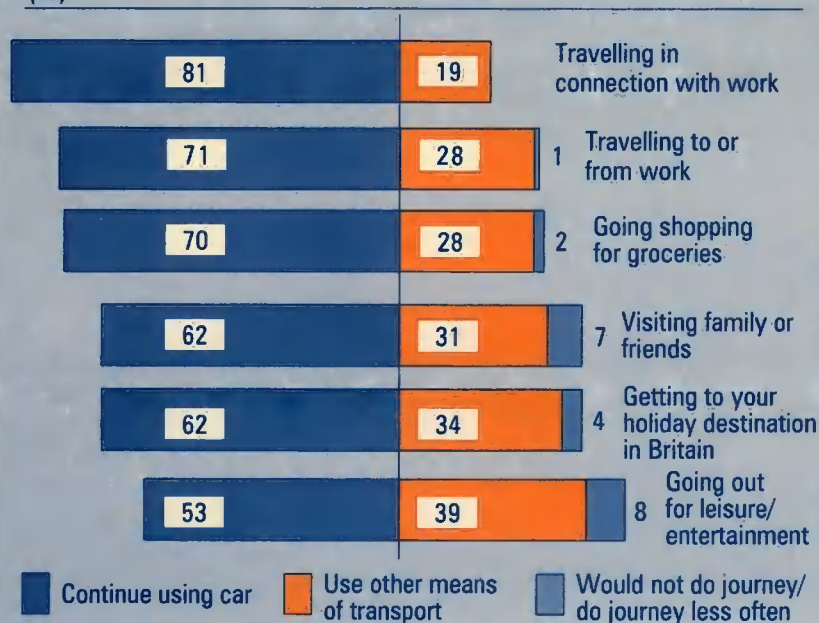


Base: All who currently normally do journey by car

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 2.6 Impact of increasing the cost of road travel

What people would do if the relative price of fuel were to double (%)



Base: All who currently normally do journey by car

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

2.3 Road-rage and speeding

Motorists are worried about other people's driving behaviour and nearly three-quarters of people have been the victim of road-rage at some time. Last year 1.8 million people were forced off the road by other drivers. Those people who admit to speeding are more likely to be victims of road-rage.

One third of drivers say that they never speed, with just one in five saying that they speed most times that they drive. Those who speed are most likely to be young men.

Two problems possibly exacerbated by the problems with congestion and heavy traffic are the pressures to get from A to B quickly and a phenomenon that has received a lot of attention in recent years - road-rage. In this year's Lex Report on Motoring the extent and possible causes of road-rage in Great Britain are examined together with the extent to which different groups exceed the speed limit.

Worries about other drivers

An aspect of car-travel that many motorists are concerned about is the driving behaviour of other people.

"There are some irritable drivers who blow their horn at the slightest provocation and some people show-off pulling away from traffic lights"
Male, 25-34

"The roads are so crowded these days. With delays you can start to lose control of the situation"
Male, 45-54

"There are lunatics on the road"
Female, 25-34

"Other drivers can sometimes be a nuisance, they are not exactly patient with each other"
Male, 25-34

"There are too many aggressive drivers on the road, some of them have never heard of the Highway Code"
Male, 65+

The incidence of road-rage

Perhaps not surprisingly, given the comments on the problems people encounter on the road, road-rage is a widespread phenomenon (see figure 2.7.).

Nearly three-quarters of the population have been the victim of road-rage at some time. Over one in six have been forced off the road by other drivers and nearly one in ten have had people get out of their cars and physically threaten them.

Figure 2.7 The incidence of road-rage
% experienced

| | EVER | LAST 12 MONTHS | | | | | | | | |
|---|-------|----------------|---|-----------------------|---------------|------------------|-----------------|---------------|--------|----------|
| | | | Those who speed "most times they drive" | Those who never speed | | | 17-24 year olds | 65+ year olds | | |
| | All % | All % | % | % | City dwellers | Country dwellers | % | % | Male % | Female % |
| Another driver verbally abused me or gestured at me whilst still in their own car | 65 | 46 | 54 | 36 | 44 | 43 | 61 | 23 | 48 | 42 |
| Another driver forced me to pull over or off the road | 17 | 7 | 7 | 7 | 6 | 9 | 11 | 7 | 8 | 5 |
| Another driver got out of their car and physically threatened me | 9 | 3 | 6 | 1 | 3 | 3 | 5 | 0 | 3 | 2 |
| Another driver deliberately hit the car I was in | 6 | 2 | 2 | 1 | 1 | 2 | 1 | 2 | 1 | 2 |
| Another driver got out of their car and physically attacked me | 2 | 1 | 2 | 0 | 0 | 0 | 3 | 0 | 1 | 1 |
| Another driver got out of their car and deliberately damaged the car I was in | 2 | 1 | 2 | 0 | 0 | 0 | 1 | 0 | 1 | 0 |
| None of these | 27 | 50 | 42 | 60 | 53 | 51 | 35 | 70 | 47 | 54 |

| | LAST 12 MONTHS | | | | | | |
|---|----------------|--------|----------------------------|----------------------|----------|------------------|----------|
| | All | London | South-East and East Anglia | South-West and Wales | Midlands | North of England | Scotland |
| | % | % | % | % | % | % | % |
| Another driver verbally abused me or gestured at me whilst still in their own car | 46 | 47 | 43 | 53 | 44 | 48 | 48 |
| Another driver forced me to pull over or off the road | 7 | 7 | 8 | 11 | 7 | 5 | 4 |
| Another driver got out of their car and physically threatened me | 3 | 4 | 4 | 3 | 2 | 2 | 3 |
| Another driver deliberately hit the car I was in | 2 | 2 | 3 | 2 | 1 | 1 | 2 |
| Another driver got out of their car and physically attacked me | 1 | 1 | 1 | 1 | 0 | 0 | 1 |
| Another driver got out of their car and deliberately damaged the car I was in | 1 | 1 | 1 | 1 | 0 | 1 | 1 |
| None of these | 49 | 51 | 52 | 40 | 53 | 49 | 46 |

Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

In the last twelve months there have been approximately:

- 1.8 million instances of people being forced off the road.
- 800,000 instances of people being physically threatened.
- 500,000 people who had their cars deliberately hit by other cars.
- 250,000 people attacked by other drivers.
- 250,000 people who had their cars deliberately damaged by another driver.

"A lot of drivers on the road are ignorant and arrogant"

Male, 65+

"A lot of other drivers have road-rage"

Female, 17-24

People in the city are more likely to have suffered the road-rage of others than people who live in more rural areas, although in the city this road-rage is mainly confined to gesturing - 44% of people living in cities have been victims of this in the past 12 months. In rural areas there are more physical manifestations - 9% have been forced off the road in the last 12 months.

The young are much more likely than older people to have been victim to the road-rage of others, as have those people who speed.

There is relatively little difference in the road-rage experiences of men and women.

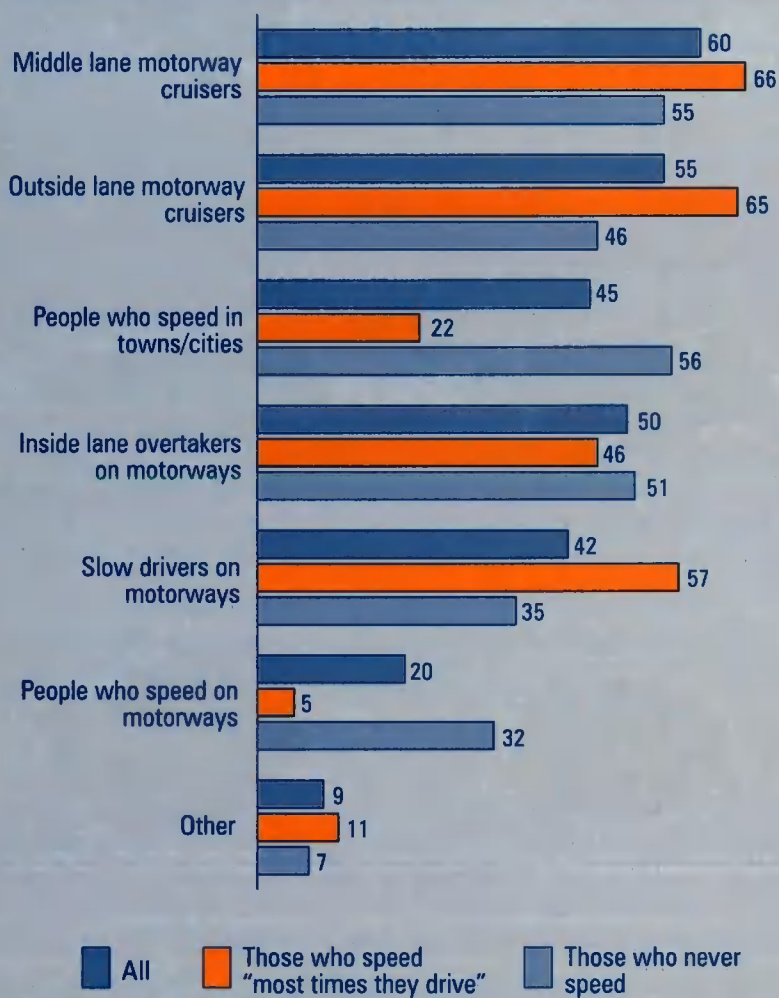
There are some differences in the level of road-rage experienced in different regions of Britain. There appears to be a broad North-South divide, with those in Scotland, the North and the Midlands mainly experiencing just gesturing and verbal abuse, whilst in the South-West and Wales, London and the South-East, there are a higher proportion of people who have been physically threatened or run off the road.

What fuels road-rage?

Those people who nearly always speed find people who cruise in the middle or outside lane of motorways most annoying, as well as those who drive slowly on the motorway.

Those people who never speed also find mid-lane cruisers annoying, but are more likely to be annoyed by people who speed in towns and cities and those who speed on motorways (see figure 2.8).

Figure 2.8 The types of drivers people find annoying
% agreeing



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

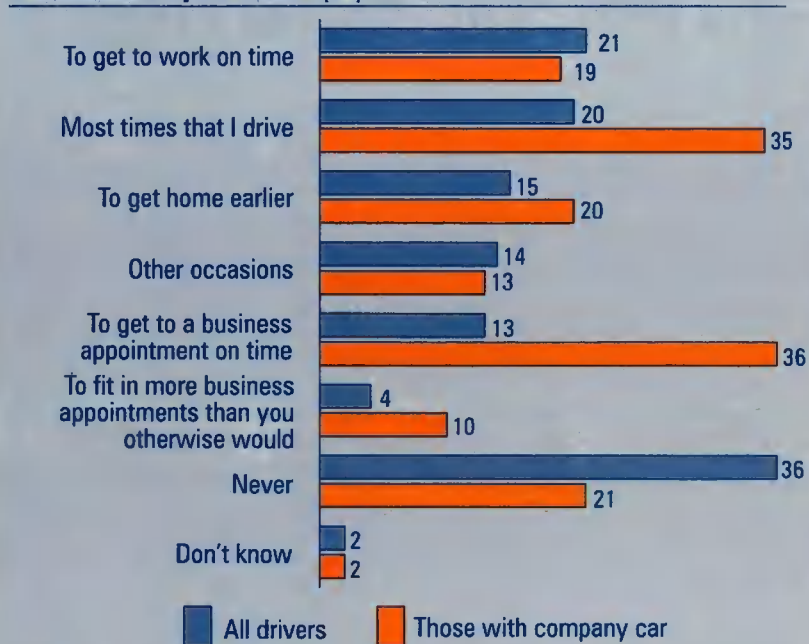
When do people exceed the speed limit

Despite the number of comments on the unruly behaviour of other drivers, there are still 36% of people who say they **never** speed (see figure 2.9.). Just one in five say that they speed most times that they drive. 21% of people say that they have exceeded the speed limit to get to work on time and 15% to get home earlier. These were the most common reasons for having exceeded the speed-limit.

Those with company cars are more likely to speed than private car owners, with one-third saying they speed most times they drive and a similar proportion saying they have exceeded the speed limit to get to a business meeting on time. There are still 21% of company car drivers, however, who say that they never speed.

When the profile of those people who regularly exceed the speed limit was examined, a fairly stereotypical picture emerged. Nearly twice as many men as women were persistent offenders. Under 35's were two and a half times as likely to regularly break the speed limit as over 55's and worst of all were young men, with nearly one-third saying they exceeded the speed limit most times that they drove (see figure 2.10.).

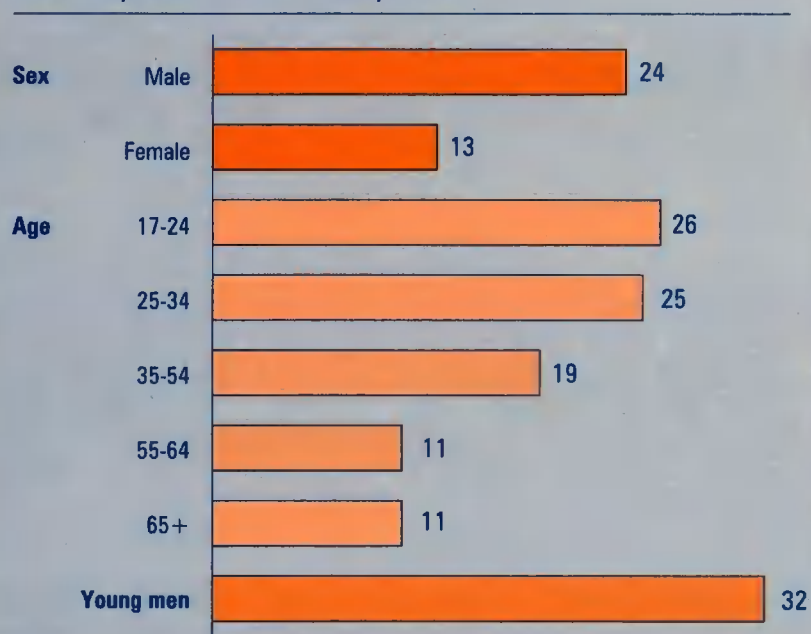
Figure 2.9 Circumstances under which people sometimes exceed the speed limit (%)



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 2.10. A profile of persistent speeders
% who speed most times they drive



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

3 Views on Transport Policy

Earlier evidence showed that there is a great deal of reliance upon the car, from industry, drivers and non-drivers. At the same time it is clear that people perceive that there are problems associated with the car. This section looks at the policies the various groups would like to see introduced against this background of reliance on the car and road travel.

3.1 Priorities for change in transport policy

Perhaps surprisingly, there was a similar balance of opinion amongst drivers and non-drivers about the changes they would like to see happen in transport policy: an improvement in public transport provision whilst reducing fares, an increase in pedestrianisation, more park and ride schemes, more cycle lanes and a reduction in speed limits in residential areas. Many believe this will benefit them personally but also help the environment. There is significant net positive support amongst drivers for building more town and city bypasses, but net opposition amongst both groups for building new motorways and trunk roads and the introduction of road-pricing, even though it is thought this would benefit the economy.

There is wide support among the general public for the aims of recent protests about building roads in the countryside and traffic congestion in cities, although there is little support for the methods of protesting.

Britain's industrial leaders also want improved public transport and more park and ride schemes, although they are also looking for improvements in the road infrastructure and would welcome road charging as a means of increasing the speed of road travel.

The benefits of policy changes

Both drivers and non-drivers were asked whether a number of policies would:

- Benefit them personally
- Benefit the environment and/or
- Benefit the British economy

Whilst there was not a majority of people behind any particular policy, the balance of opinion was in agreement across both drivers and non-drivers (see figure 3.1.).

Figure 3.1 Priorities for change in transport policy amongst the general public
% agreeing

| | Would benefit them personally | | Would benefit the environment | | Would benefit the British economy | |
|--|-------------------------------|-------------|-------------------------------|-------------|-----------------------------------|-------------|
| | Driver | Non-drivers | Drivers | Non-drivers | Drivers | Non-drivers |
| | % | % | % | % | % | % |
| Improve the bus, rail and tram networks | 43 | 50 | 39 | 33 | 24 | 22 |
| Introduce more "park and ride" schemes in major towns and cities | 37 | 24 | 37 | 29 | 9 | 7 |
| Reduce the prices on buses and trains | 35 | 58 | 24 | 25 | 14 | 10 |
| Pedestrianise all town centres | 27 | 34 | 37 | 30 | 5 | 4 |
| Reduce the speed limits in residential areas | 25 | 40 | 20 | 21 | 2 | 4 |
| Build more town and city bypasses, but no more motorways | 25 | 12 | 12 | 10 | 13 | 9 |
| Provide more cycle lanes and cycle parking facilities | 18 | 22 | 30 | 28 | 5 | 4 |
| Build more lanes onto existing main roads and motorways | 14 | 5 | 2 | 2 | 9 | 7 |
| 60 mph motorway speed limit strictly enforced | 13 | 12 | 20 | 13 | 5 | 4 |
| Build more main roads and motorways | 11 | 4 | 2 | 2 | 14 | 8 |
| Charge people who want to drive into town centres | 10 | 9 | 16 | 14 | 18 | 12 |
| Motorway tolls | 3 | 2 | 7 | 4 | 35 | 22 |
| None of these | 7 | 5 | 2 | 2 | 6 | 5 |
| Don't know | 3 | 7 | 7 | 14 | 16 | 32 |

Base: All drivers (1229) and non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

The areas in which the greatest number of people thought changes would benefit them personally, amongst both drivers and non-drivers, were improving the bus, rail and tram networks and reducing the prices of buses and trains. There were also large numbers of people in both groups who thought more pedestrianisation, park and ride schemes, cycle lanes and a reduction in the speed limits in residential areas would benefit them personally.

A quarter of drivers say an increase in the number of bypasses would benefit them personally.

Very few in either group believe that building more main roads and motorways, or road pricing would benefit them personally.

The issues that many drivers and non-drivers think would benefit the environment were similar to those they think would benefit them personally. There is again broad agreement between drivers and non-drivers.

Policies that the largest number of people believe would benefit the environment are:

- Improving the bus, rail and tram network
- Introducing more park and ride schemes
- Pedestrianising all town centres
- Providing more cycle lanes

The policies that were thought to be least favourable to the environment were building more main roads and motorways and building more lanes onto existing main roads and motorways.

The last part of this question, where people were asked which policies they thought would benefit the British economy, revealed some differences between what many people feel would benefit them and what would be good for the economy.

The largest number of both drivers and non-drivers said that introducing motorway tolls would benefit the economy, with improving the bus, rail and tram network second and charging people to go into town centres third.

The measures which fewest people felt would benefit the British economy were reducing speed limits in residential areas, pedestrianisation and providing cycle lanes.

Support for policy changes amongst the general public

Having established where people believed the benefits of policy changes may fall, they were then asked which of these policies they would support and which they would oppose.

The balance of opinion is for those policies that many people believe would benefit both the environment and them personally, rather than those which they believe would solely benefit the economy (see figure 3.2.). This is true for both drivers and non-drivers.

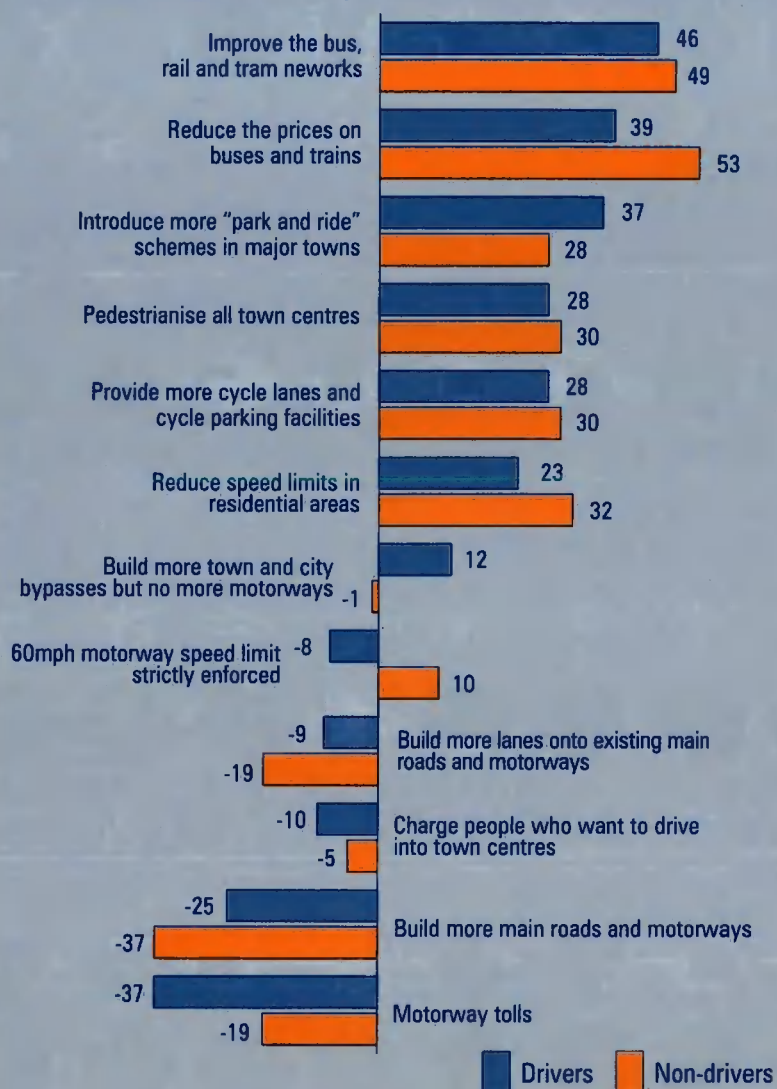
Strongest net support was for improving the public transport system and reducing prices on public transport. There was also net support for measures to reduce in-town congestion and pollution, such as park and ride schemes, pedestrianisation and provision of cycle lanes. Safety was also high on many people's agenda, with strong net support for reducing speed limits in residential areas.

There was net support amongst drivers for building new town and city bypasses.

There was net opposition for building more main roads and motorways and widening existing roads, although this was more significant amongst non-drivers. There was also opposition to road charging.

Although there were some differences between drivers and non-drivers and between different demographic groups, the balance of opinion on the main priorities was similar across all groups.

Figure 3.2. Net support for transport policies amongst the general public % would support minus % would oppose



Base: All drivers (1229) and all non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Support for policy changes within Industry

A similar set of questions were asked of Captains of Industry and also of transport professionals, with the issues tailored to reflect some of the more specific issues pertinent to industry. Figure 3.3. uses as a base those who either supported or opposed each policy, highlighting the net support or opposition within the two samples*.

There was broad agreement between the Captains of Industry and the transport professionals. The main area of difference was in road charging, in its various forms, where the balance of opinion within Captains of Industry was in favour, whereas amongst transport professionals the balance of opinion was against. There was much greater support amongst transport professionals than Captains of Industry for widening the current motorway and trunk road network.

Of those issues that were also probed among drivers and non-drivers, there are a number of areas where the balance of opinion among Britain's industrial leaders and the general public was in accord:

Both want:

- more park and ride schemes
- more investment in buses and trains

Both oppose:

- charging people to drive in cities

But there were also areas where the balance of opinion was in discord.

Britain's industrial leaders want:

- more investment in motorways and trunk roads
- new toll roads
- tolls on certain main trunk routes (although this was opposed by transport professionals)
- widening of existing motorways and main roads (especially transport professionals)

Britain's industrial leaders do not want:

- to ban cars from city centres

Some of the specific industry issues for which there is net support include improving road access to docks for heavy goods vehicles and introducing more bus lanes. Some of the issues opposed are reserving a lane on motorways for heavy goods vehicles and switching freight from rail to road.

* Slightly different methodologies were used for the surveys of Captains of Industry and transport professionals, leading to different levels of "Don't Knows". For comparison purposes "Don't Knows" were therefore excluded from the analysis.

Figure 3.3 Net support for transport policies within industry

Of those who expressed an opinion:

% should introduce minus % should not introduce

| | Captains of industry | Transport professionals |
|--|-------------------------|----------------------------|
| | % | % |
| Introduce more "park and ride" schemes in towns and cities | 87 | 80 |
| Invest a lot more in buses and trains | 84 | 71 |
| Improve road access to docks for heavy goods vehicles | 73 | 65 |
| Introduce toll charges on certain main trunk routes and motorways | 51 | -27 |
| Invest in more motorways and main trunk roads | 49 | 41 |
| Build new toll roads to relieve congestion on trunk roads and motorways | 47 | 9 |
| Introduce more bus lanes on roads in towns and cities | 45 | 53 |
| Widen Britain's existing motorways and main trunk roads | 18 | 56 |
| Increase subsidies for public transport paid for out of taxes | -16 | 8 |
| Charge car drivers £3 a day to drive in cities | -18 | -48 |
| Have lanes reserved for cars with two or more occupants | -28 | -57 |
| Reserve one lane on motorways as a toll lane for heavy commercial vehicles | -33 | -28 |
| Charge higher tax on large cars | -34 | -25 |
| Ban cars from city centres | -46 | -22 |
| Much higher taxes on petrol to discourage consumption | -49 | -64 |
| Encourage switch of freight from rail to roads | -77 | -67 |

Base: Captains of Industry (113) and transport professionals (58)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 3.4 Support for protesters
 % supporting cause and means of protest

| | Drivers | | Non-drivers | |
|--|---------|--------------------|-------------|--------------------|
| | All | 17-24 year olds | All | 17-24 year olds |
| Protests about roads being built through the countryside by physically blocking the way of construction vehicles or by climbing trees | | | | |
| Support for cause | 59 | 70 | 60 | 65 |
| Support for means | 26 | 35 | 24 | 33 |
| Protest about the amount of traffic congestion and pollution in cities by physically blocking roads in the rush hour | | | | |
| Support for cause | 82 | 83 | 75 | 76 |
| Support for means | 21 | 22 | 22 | 24 |

Base: All drivers (1229) and all non-drivers (717)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Support for anti-road and anti-traffic protesters

Both drivers and non-drivers were asked about the protests that have been occurring over recent years about road building programmes and congestion in towns and cities.

They were first asked about support for the cause and then about the means of the protest (see figure 3.4.). (The exact wording used in the questions is given at the bottom of the page.)

Nearly six in ten supported the aims of protests about roads being built through the countryside, both amongst drivers and non-drivers. More young people - nearly seven in ten - supported this cause, although in fact a majority of all demographic groups were behind the cause.

There was, however, relatively little support for the method of protesting. Only one in four supported the means of the protest. More under 25 year olds - a third - supported the method of protesting.

There was even wider support for the aims of protests about the amount of traffic congestion and pollution in cities. It was shown earlier that this is at the top of many people's list of concerns about the impact of the car. Support was marginally higher amongst drivers than non-drivers, but around eight in ten of both groups supported the cause.

There was, however, even less support for the method of protesting, with only one in five agreeing with the way the protests had been carried out. This low level of support was also found amongst young people - both drivers and non-drivers.

Those drivers for whom local congestion is a serious problem are more likely to support both the cause and the means of the protests.

Qn.a. You may have seen or read in the news about people who have been protesting against certain new roads being built through the countryside. Regardless of *how* they were protesting, do you agree or disagree with their cause?

Qn.b. To gain news coverage, some of these demonstrators were protesting by physically blocking the way of the construction vehicles or by climbing trees. Regardless of whether you agree with their cause or not, do you agree or disagree with their method of protesting?

Qn.a. You may also have seen or read in the news about people who have been protesting about the amount of traffic congestion and pollution in cities. Again, regardless of *how* they were protesting, do you agree or disagree with their cause?

Qn.b. To gain news coverage, some of these demonstrators were protesting by physically blocking roads during the rush hour. Again, regardless of whether you agree with their cause or not, do you agree with their method of protesting?

3.2 Attitudes towards public transport

Figure 3.5 Attitudes to public transport
% agreeing "I would use my car less if public transport were better"



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

The use of public transport has fallen at the same time as more motorists say they would use it, if the service were better. The barriers to motorists using public transport more often than they do currently relate to speed, convenience, reliability, price and carrying heavy luggage and shopping. People want any improvements in public transport to be financed from savings in the road building programme, together with money from general taxes.

Improving public transport is at the top of many people's agenda. This section examines the level of use of public transport and the barriers to using public transport more.

The use of public transport

Improving the public transport system is high on the list of policy changes that many drivers want to see brought in. At the same time, the use of public transport has been falling. From 1989 to 1994 the use of buses and coaches fell by 8.5% and the use of rail by 12.5%, whilst the use of cars rose by 2.6%. During this period bus services, in terms of miles covered, increased by 8%, whilst train services remained fairly level.

There is clearly a willingness to use public transport in principle, as can be seen by the rise over the last eight years in the proportion of people who agree with the statement "I would use my car less if public transport were better" (see figure 3.5.). There is, however, a reluctance to use it in practice.

The reasons people do not use public transport more

Motorists were asked why it was they did not use public transport more and these answers were compared to the answers given when the question was asked in 1990. Deregulation of buses started in the mid 1980s and would have impacted on public transport services since the question was last asked.

Despite bus services increasing, the issue that has risen to the top of the list is "desired routes not covered by public transport", which 50% more motorists stated now than in 1990.

Other main reasons are still:

- | | |
|---------------|--|
| Speed | - takes too long to get to destination |
| Inconvenience | - do not like having to wait |
| | - infrequency of service |
| Reliability | - unreliable, unpunctual |
| Price | - fares too high |

A new category, *carrying heavy luggage/shopping* is seen as being a major factor against public transport now.

Figure 3.6 Reasons for not using public transport more

"Which of these would you say are the main two or three reasons why you don't use public transport more?"

| | 1995 | 1990 |
|---|------|------|
| | % | % |
| Desired routes not covered by public transport | 38 | 24 |
| Takes too long to get to destination | 31 | 28 |
| Heavy luggage/shopping* | 31 | 13 |
| Do not like having to wait for bus/train | 27 | 32 |
| Infrequency of service | 26 | 24 |
| Unreliable service/unpunctual | 23 | 22 |
| Fares too high | 23 | 28 |
| Inconvenience of timetable | 17 | 20 |
| Inconvenience of getting to station/bus stop/terminal | 15 | 15 |
| Don't feel safe using public transport | 9 | n/a |
| Too crowded | 8 | 13 |
| Dirty | 8 | 9 |
| Ignorance of routes/timetable | 8 | 10 |
| Lack of parking at station | 4 | 5 |
| Disabled/frail | 3 | 3 |
| None of these | 1 | 4 |
| Don't know/no opinion | 1 | 1 |

*Listed as "heavy luggage" in 1991

Base: All drivers 1995 (1229), 1990 (1277)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

The problems appear to relate to the fundamentals of the service, rather than issues such as being too crowded or dirty.

Different demographic groups have different reasons for not using public transport more often. The key areas in which each groups' responses differed from the average is given in figure 3.7.

There have also been a number of changes in the way in which motorists believe improvements in public transport should be financed (see figure 3.8.). In 1991, the option that received the greatest support was for funding to come from general taxes. Whilst this is still a popular option, the option that received greater support than any other was to divert funds from road building. 29% of drivers believed that this should be done. There was also relatively strong support for using toll charges to fund public transport, contradicting earlier evidence which suggested that drivers were against the principles of road pricing.

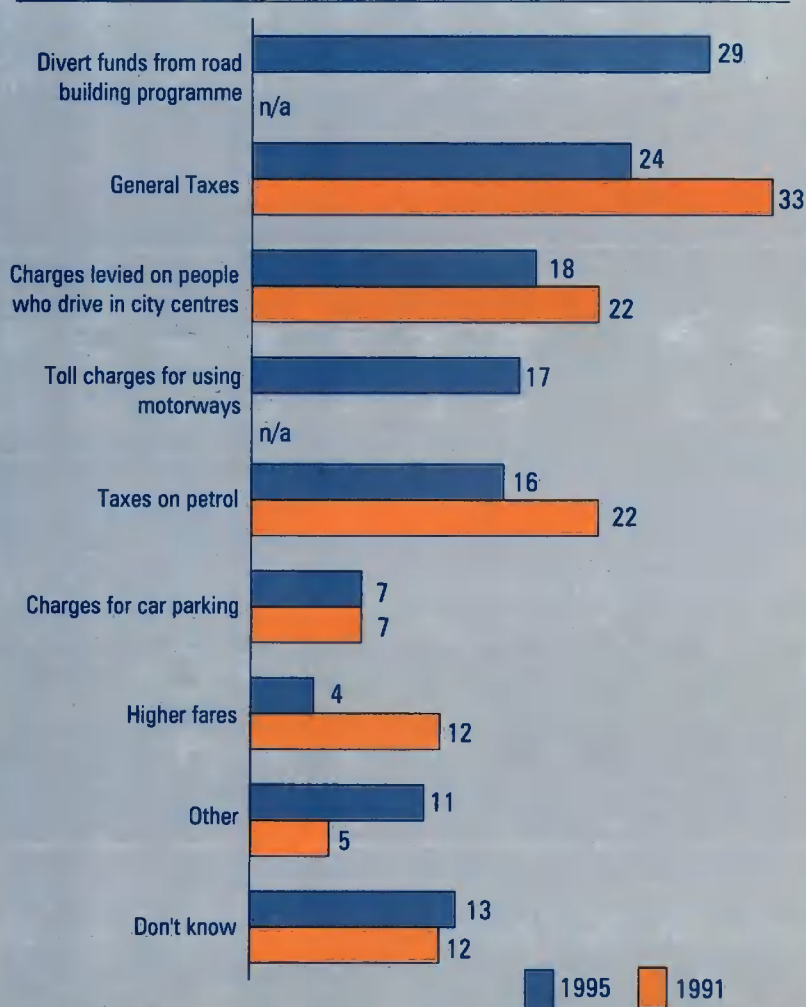
Figure 3.7 What would make people use public transport more

| Group | Current use of public transport* % | Key differences in the responses of each group % mentioning |
|--------------------------|---------------------------------------|--|
| Men | 5 | desired routes not covered (41%) |
| Women | 5 | heavy luggage/shopping (45%) do not feel safe (14%) |
| City dwellers | 13 | unreliable, unpunctual (32%) do not feel safe (16%) |
| Country dwellers | 2 | desired routes not covered (45%) infrequency of service (32%) |
| AB's | 5 | desired routes not covered (47%) |
| C2's | 6 | do not like having to wait (35%) |
| Households with children | 3 | heavy luggage/shopping (39%) |
| Women with children | 6 | heavy luggage/shopping (46%) |
| Young people | 8 | takes too long (41%) |
| Older people | 4 | disabled/frail (15%) |

* The percentage of drivers who normally use public transport for the main part of their journey when travelling on a leisure/entertainment occasion.

Figure 3.8. Q. If investment was made to improve public transport, how should this be financed?

% agreeing with each method



Base: All drivers 1995 (1229), 1991 (1277)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

3.3 Support for environmental improvements

Many motorists would accept restrictions on in-town driving as a way of helping the environment. There is also some support for electric cars and for speed-limiters on cars. There is little support for increasing tax on fuel and thus petrol prices, as a means of helping the environment.

Air pollution is one of people's greatest concerns with regards to the problems caused by the car. The wider environmental issue of the impact of the car on global warming is seen as important but lower down people's order of priorities (see figure 2.1.). In this section the acceptability of different methods of dealing with environmental problems caused by the car are examined.

Support for environmental policies

Drivers were presented with a series of suggestions to reduce the effects of the car on the environment. They were asked to say which of the options they would accept as a way of significantly reducing damage to the environment.

There is strongest acceptance of restrictions on in-town driving, simultaneously helping air pollution and congestion (see figure 3.9.).

Over a third of people would accept the idea of an electric car and a similar number the idea of a 70 mph speed limiting device on cars. Women and older people in particular would welcome the speed limiter.

There was least support for doubling the price of fuel. This is consistent with the responses that were given to a question asked on the likely impact on travel patterns of doubling the price of fuel (see section 2.2.). On journeys related to leisure/entertainment, for example, just 8% of people said they would do the journey less often if fuel prices doubled, whilst 39% said they would use an alternative mode of transport to the car. On journeys to and from work seven in ten say they would continue using their car.

If fuel prices doubled, the average motoring household would have to pay over £700 per annum more to maintain their current driving habits.

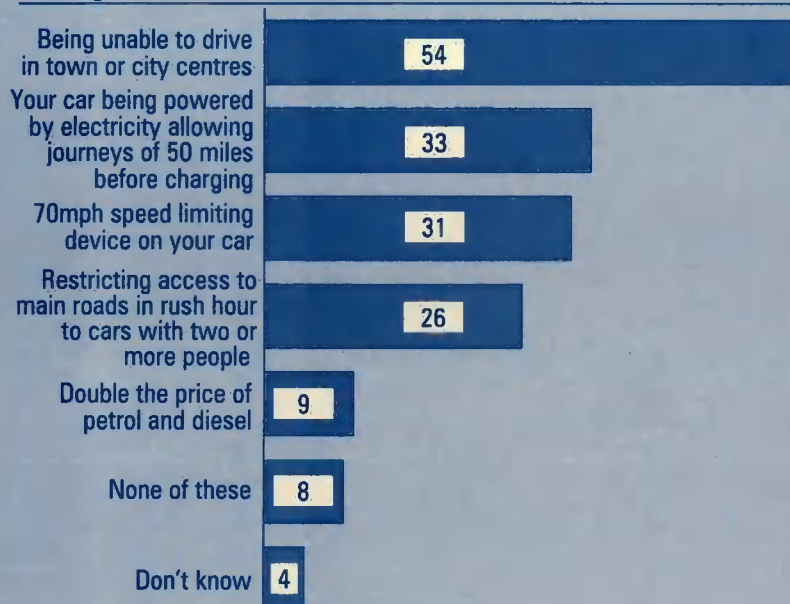
The changing size of trucks

Despite the concern that is often expressed about the impact of trucks and vans on life in Britain, there is confusion about what people feel would be the best policy in terms of the type of trucks we have on our roads. When asked whether they would prefer more, smaller lorries or fewer, larger lorries, significant numbers felt unable to respond, signifying that this debate has some way to run before public opinion finally comes down on one side or the other.

Whilst the overall balance of opinion was for having fewer, bigger lorries, rather than more, smaller lorries, there were significant differences in the opinions of different age-groups (see figure 3.10.). More younger people were in favour of fewer, larger lorries, whereas there were more older people in favour of more, smaller lorries.

Figure 3.9 Support for environmental options

% accepting each option as a way of significantly reducing damage to the environment

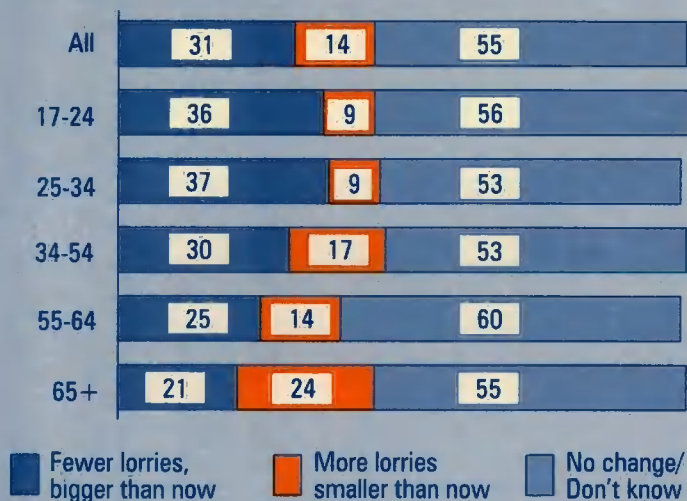


Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 3.10 Size of lorries

Q. To handle the distribution of goods in Britain, do you think that in the future there should be FEWER lorries which are BIGGER than now, MORE lorries which are SMALLER than now or no change from the current situation? (%)



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

4 Views on the car industry

Many of the fundamental likes and dislikes of owning a car expressed by drivers in the survey related to the freedom the car provides and the problems created by so many people wanting that freedom. There were, however, a number of comments that related to the buying, servicing and owning of cars themselves.

In this section people's attitudes to the car industry are examined, as are those areas in the servicing and buying of cars where people would most like to see change.

4.1 Confidence in car manufacturers

Motorists believe manufacturers have improved in nearly every respect over the past ten years, particularly in safety, handling, performance and comfort. The area of least perceived improvement has been in providing value-for-money. A third of potential new car buyers now consider nearly-new cars.

Improvements in the performance of manufacturers

Competition in the world car market is very strong and there has subsequently been constant change in the features of cars for sale.

Car drivers were asked in what areas they thought manufacturers have improved or got worse over the past ten years (see figure 4.1.).

Drivers believe that manufacturers have improved in nearly every area, but the areas of greatest perceived improvement are:

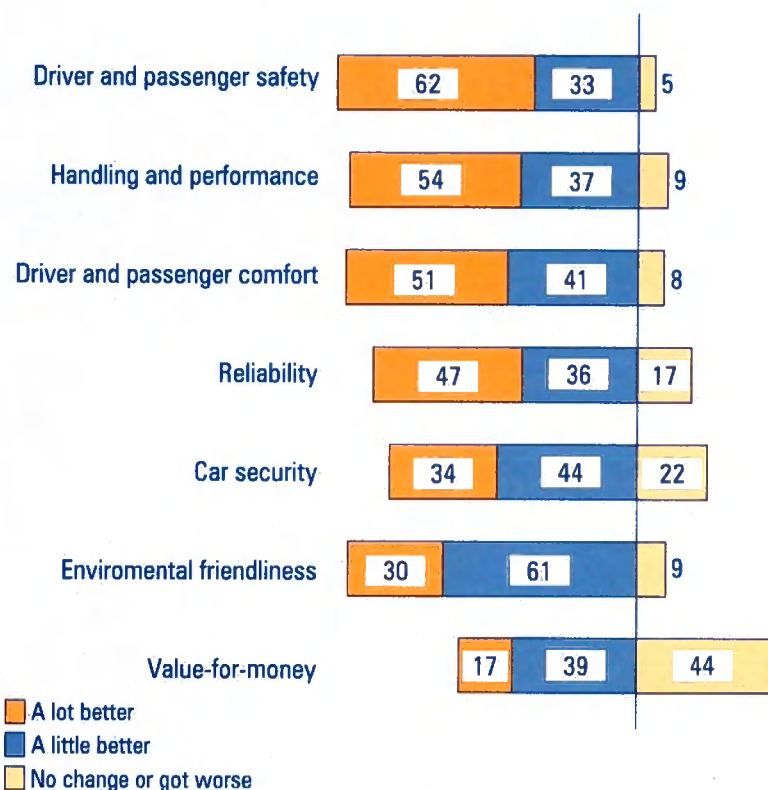
- Driver and passenger safety
- Handling and performance
- Driver and passenger comfort

The areas that people think have improved, but to a lesser degree, are: reliability, security and environmental friendliness.

The area that people feel has improved least is value-for-money, where over four in ten feel it has got worse or no better.

Figure 4.1 Improvements by manufacturers over the last ten years

%



Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Nearly-new cars

This concern about the value represented by new cars may be one of the reasons that nearly-new cars have become popular.

Nearly four in ten of those who bought a new or used car under three years old recently, considered buying a nearly-new car. 11% went on to buy a nearly-new car - that is a car less than six months old or with less than 5000 miles on the clock (see figure 4.2.). This is equivalent to 350,000 cars or 22% of all cars not bought directly by companies for their employees. A third of those who eventually bought a new car considered a nearly-new car.

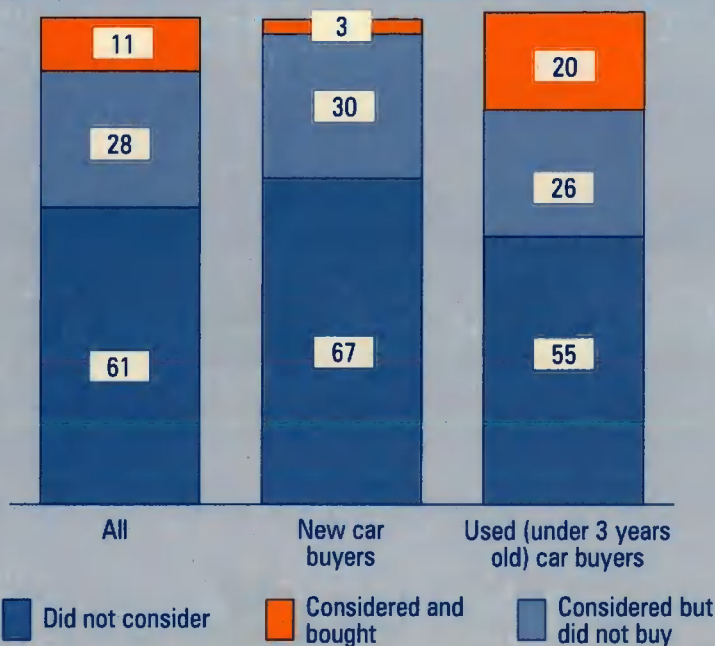
When those who considered a nearly-new car were asked why, the most common comments by far related to better value-for-money, less depreciation and getting a good deal. A significant number also felt that there was an advantage in nearly-new cars over new cars in that they had already been "run in" (see figure 4.3.).

Those new car buyers who did not consider a nearly-new car were asked why they bought a new car instead of a second hand car. The most common reasons given were; reliability, guarantees, because they could afford it, and wanting an up-to-date model.

Figure 4.2 Consideration of nearly-new cars

Nearly-new car defined as one that is less than six months old or with less than 5000 miles on the clock

%



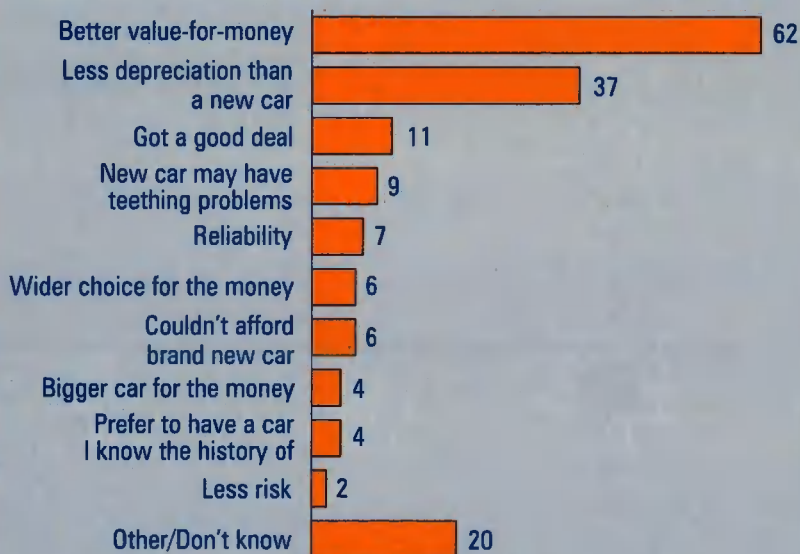
Base: All who bought new or second hand less than three years old in last two years (308)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 4.3 Reasons for considering a nearly-new car

(Spontaneous)

%

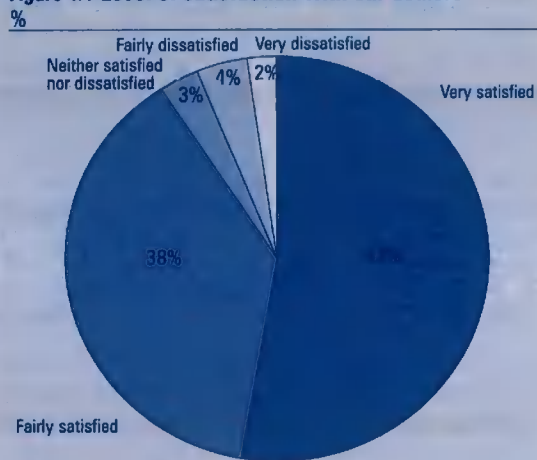


Base: All who bought or considered buying a nearly-new car (117)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

4.2 Views on the car buying experience

Figure 4.4 Level of satisfaction with car dealers



Base: All who bought last car from dealer (391)
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Most motorists who buy a car through a dealer find the experience satisfactory. 91% say they are satisfied overall, although nearly four in ten experience some problems, particularly with after-sales care and the attitudes and techniques of sales-people. Half of those who experienced problems complained or decided to use another dealership next time.

In seeking advice on buying new cars people trust their friends most, with manufacturers second. The level of trust in dealers has risen substantially since 1989, but is still relatively low.

In this section the experience people have when buying a car through a dealer is looked at.

Overall satisfaction with car dealers

Many people find the process of buying a car enjoyable and are broadly satisfied. 91% of those who bought their last car from a dealer were satisfied with the experience, with over half very satisfied (see figure 4.4.). 6% of car buyers were dissatisfied with the experience.

When asked what specifically they liked about buying a car, typical comments included:

"The thrill of buying a new car and the pride of ownership"

Female, 25-34

"The sales staff made you feel valued as a prospective customer and took the time to meet your requirements"

Male, 25-34

"The smell of a new car. I didn't want anyone to have driven it before me"

Female, 35-44

"Having the salesman hang on to your every word"

Male, 65+

The level of overall satisfaction was higher amongst new car buyers than amongst used car buyers. 59% of new car buyers were "very satisfied" compared to 48% of used car buyers.

More used-car buyers who bought through a franchised dealer were "very satisfied" with the experience (52%), than those who bought from a dealer who just sold used cars (46%).

People over 55 years old were, on average, more satisfied with the car buying experience than those under 55 years old. 63% of over 55's were "very satisfied" compared to 50% of those under 55.

When probed, the source of the lower overall satisfaction was often to do with after-sales care.

Areas of dissatisfaction with car dealers

When specifically asked whether there were particular areas of disappointment, people were more forthcoming. 39% of those who bought their last car from a dealer had one or more area of dissatisfaction (see figure 4.5.).

The most common complaint was about after-sales service, but there were also a wide variety of comments about the service and sales techniques provided by the salespeople.

When recent buyers were specifically asked what they most disliked about the experience of buying a car the comments included:

"Car salesmen are too patronising to women, they tend to think that women know nothing about cars"

Female, 25-34

"Trying to arrange the finance - you have to prostitute yourself to get the finance"

Male, 45-54

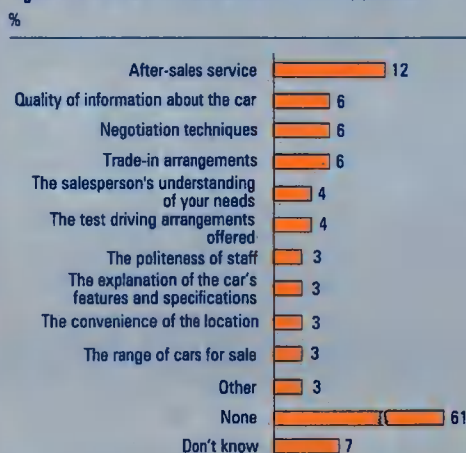
"The car I bought was the one I wanted but the salesmen were far too pushy. I won't be going to that showroom again"

Male, 25-34

People who were dissatisfied in some way, tend to take action on that dissatisfaction (see figure 4.6.):

- 30% complained to the dealership
- 20% decided to use another dealership next time
- 9% warned other people not to use the dealership
- Only 44% did nothing about it

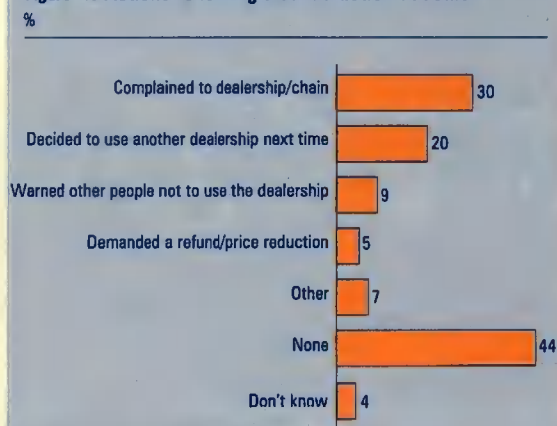
Figure 4.5 Areas of dissatisfaction with dealers



Base: All who bought last car from dealer (391)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 4.6 Actions following dissatisfaction at dealers



Base: All dissatisfied with any aspect of car dealership (125)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Sources of advice

When buying a new car many people look for advice, on what is one of the largest purchases they ever make. In figure 4.7, the proportion saying they trust different groups for that advice is shown. Friends and acquaintances are trusted a lot or a fair amount by two-thirds of new car buyers, but over half also trust manufacturers.

More people trust manufacturers than advice from magazines and television, although very few people trust car advertisements.

The level of trust in dealers has risen substantially since 1989, whilst the level of trust in all the other groups has remained fairly static over the six year period. Just over a third now say that they trust dealers, compared to a quarter in 1989.

There was a significant difference in the level of trust shown by company car drivers and private new car buyers. Company car drivers were more trusting generally, but particularly with respect to dealers (46% say they trust them a lot or a fair amount), newspaper journalists (64%) and the TV programme Top Gear (63%).

Figure 4.7 Level of trust in different sources on information when buying a new car

% saying trust a lot or a fair amount



Base: All who bought a new car in last two years (165)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

4.3 Views on car servicing

Overall satisfaction with the quality of servicing from garages and workshops has remained consistently high at around 85% over the past six years. Around three in ten, however, are dissatisfied with some aspect of their servicing, often to do with price, the quality or the punctuality of the work. 40% of those who are dissatisfied change their garage the next time they get their car serviced. The main feature that people are looking for from a garage or workshop is quality of work.

As well as the car buying process, people were asked about having their car serviced, the problems they encountered and the improvements they would most like to see.

Satisfaction with car servicing

The level of satisfaction with both main dealers and garage/workshops has remained high since service satisfaction was first measured in this survey in 1989. Nearly nine in ten people now say they are satisfied (see figure 4.8.).

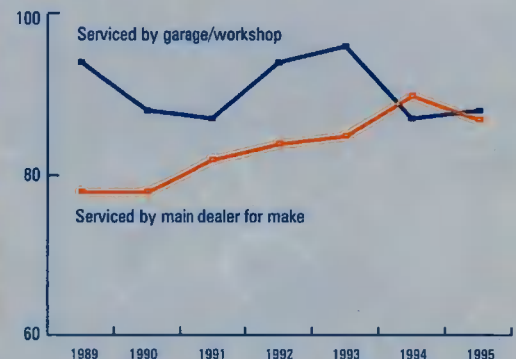
When those who said they were satisfied were asked why, typical responses included:

"They always do a good job and do it in the time they say they will"
Male, 17-24

"It's nice and clean when it is finished, I never notice any damage and they do it when they say they will their whole attitude is good."
Female, 45-54

"I have faith in the garage, their reputation is on the line if they do not do a good job. If I am dissatisfied I will tell them so - and everyone else."
Male, 55-64

Figure 4.8 Satisfaction with servicing
Net satisfaction (% "satisfied" minus % "dissatisfied")



Base: All who get their car serviced by a dealer/garage/
service centre/unit (684)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Areas of dissatisfaction with servicing

When probed if there had been any particular areas of dissatisfaction in the last two years, just under a third of those who have their car serviced at a garage said they had experienced problems, most of which were to do with the price, the quality of the work or the punctuality of the work being done (see figure 4.9.).

This level of dissatisfaction and the issues with which people were dissatisfied were very similar both for those who had their car serviced at a franchise dealer for their own make and for those who had the work done in a non-franchised garage/workshop.

Typical comments when specifically probed, included:

"I was disappointed not to get a better job done. I found it a little expensive"

Male, 25-34

"I have experienced no problems so far, but they are a little expensive. If you go to a non-dealer, they seem to be cheaper, but I don't trust a non-dealer"

Male, 25-34

"The mechanic doesn't do what the client wants them to do"

Male, 17-24

Not surprisingly it was those who were more dissatisfied overall who had more specific complaints to make. Only 17% of those who were very satisfied overall had any specific areas of dissatisfaction, whereas 73% of those who were not satisfied had specific areas of dissatisfaction, particularly about price and speed/punctuality/timing.

With respect to the car at least, many Britons do not put up with poor service. 40% of those who had been dissatisfied changed the garage they went to for their servicing (see figure 4.10.). Of those who were not satisfied with the overall service experience and had a specific area of dissatisfaction, 58% changed as a result.

Those who stayed despite being dissatisfied tended to do so because historically the service had been good or because there were no satisfactory alternatives.

"He explained what he'd done. I found him to be a good mechanic"

Male, 17-24

"It's the nearest place"

Male, 65+

"I'm quite happy with the service, but I can't do anything about the price of the spare parts"

Male, 55-64

Figure 4.9. Areas of dissatisfaction with car servicing in the past two years

%

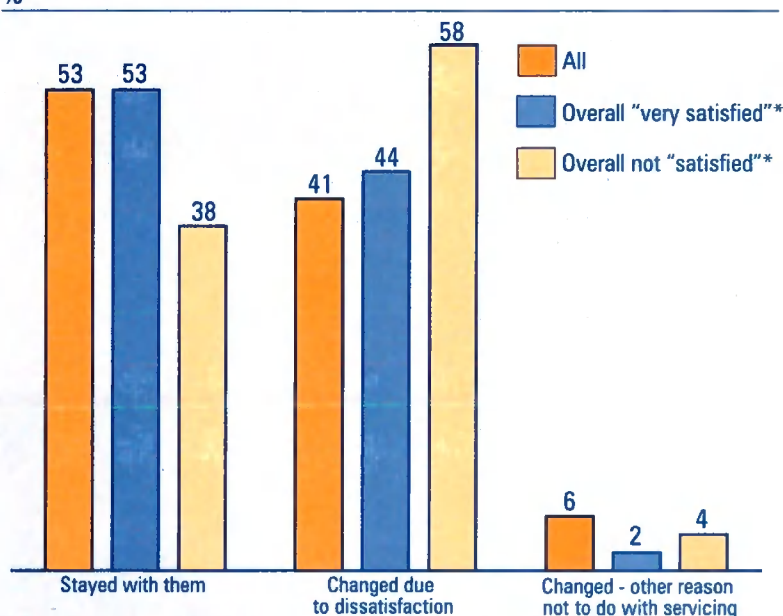
| | All | Those overall "very satisfied" | Those overall not "satisfied" |
|---|-----|-----------------------------------|----------------------------------|
| Base: | 684 | 363 | 46 |
| | % | % | % |
| The quality of work | 7 | 3 | 29 |
| The price of labour | 5 | 2 | 20 |
| Completing the work on time | 5 | 2 | 22 |
| The price of parts | 3 | 2 | 9 |
| The availability of parts | 3 | 1 | 11 |
| Sticking to the quotes given | 2 | 0 | 13 |
| Guarantees on the work undertaken | 2 | 0 | 11 |
| The politeness of staff | 2 | 1 | 11 |
| The speed of servicing/repair | 1 | 0 | 9 |
| The extra services provided | 1 | 0 | 0 |
| Parking and access | 1 | 1 | 2 |
| The convenience of the location | 1 | 1 | 4 |
| The reception facilities | 1 | 1 | 2 |
| The convenience of the timing of the service | 1 | 0 | 9 |
| Other | 3 | 3 | 9 |
| None | 71 | 83 | 27 |
| Don't know | 6 | 3 | 2 |

Base: All who get car serviced by a dealer/garage/service centre/unit (684)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure 4.10 Actions following dissatisfaction with car servicing

%

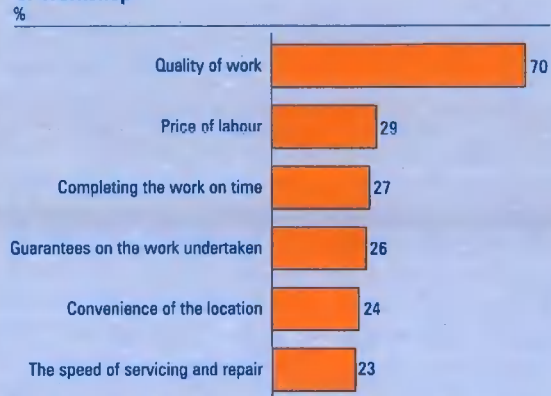


Base: All dissatisfied with any aspect of servicing at a garage or workshop in last two years and had a further service (177)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

* Note small base

Figure 4.11 The most important aspects of a service centre or workshop



Base: All who get car serviced by a dealer/garage/service centre/unit (684)
Respondents chose up to three things that were most important to them from the list provided. The top responses are listed here.
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Critical aspects of a garage or workshop

Drivers were provided with a list of attributes of a service centre or workshop and asked to choose the three that were most important to them (see figure 4.11.).

Quality of work was by far and away the most critical issue, with 70% of people saying this was most important. This was the most important issue both for those who got their car serviced at a main dealer and those who got their car serviced by a garage/workshop and to both new and used car buyers.

In more or less equal second place were price, punctuality, guarantees, convenience of location and speed. Speed and convenience were of particular importance to those who got their car serviced by a main dealer and price particularly important to those who got their car serviced at a garage/workshop.

The improvements people were looking for included:

"For them to be a little more honest. They can be scare-mongers, talking people into replacing parts that are not totally necessary"
Male, 45-54

"More reliability in carrying out the work"
Male, 35-44

"Valeting at the same time as a service"
Female, 25-34

"Keeping the prices down"
Male, 35-44

"Providing a replacement car"
Female, 35-44

"A price in advance so you know what they are talking about"
Male, 25-34

These desired improvements reflect how people choose where they go for servicing, with many comments about trust and reliability. Typical comments included:

"They are experts in the particular make so you can have more confidence in them."
Female, 55-64

"Reliability and recommendation"
Male, 35-44

"It's too complicated for most people to play around with. It also invalidates my warranty to go elsewhere. I wouldn't risk it with anyone else"
Male, 25-34

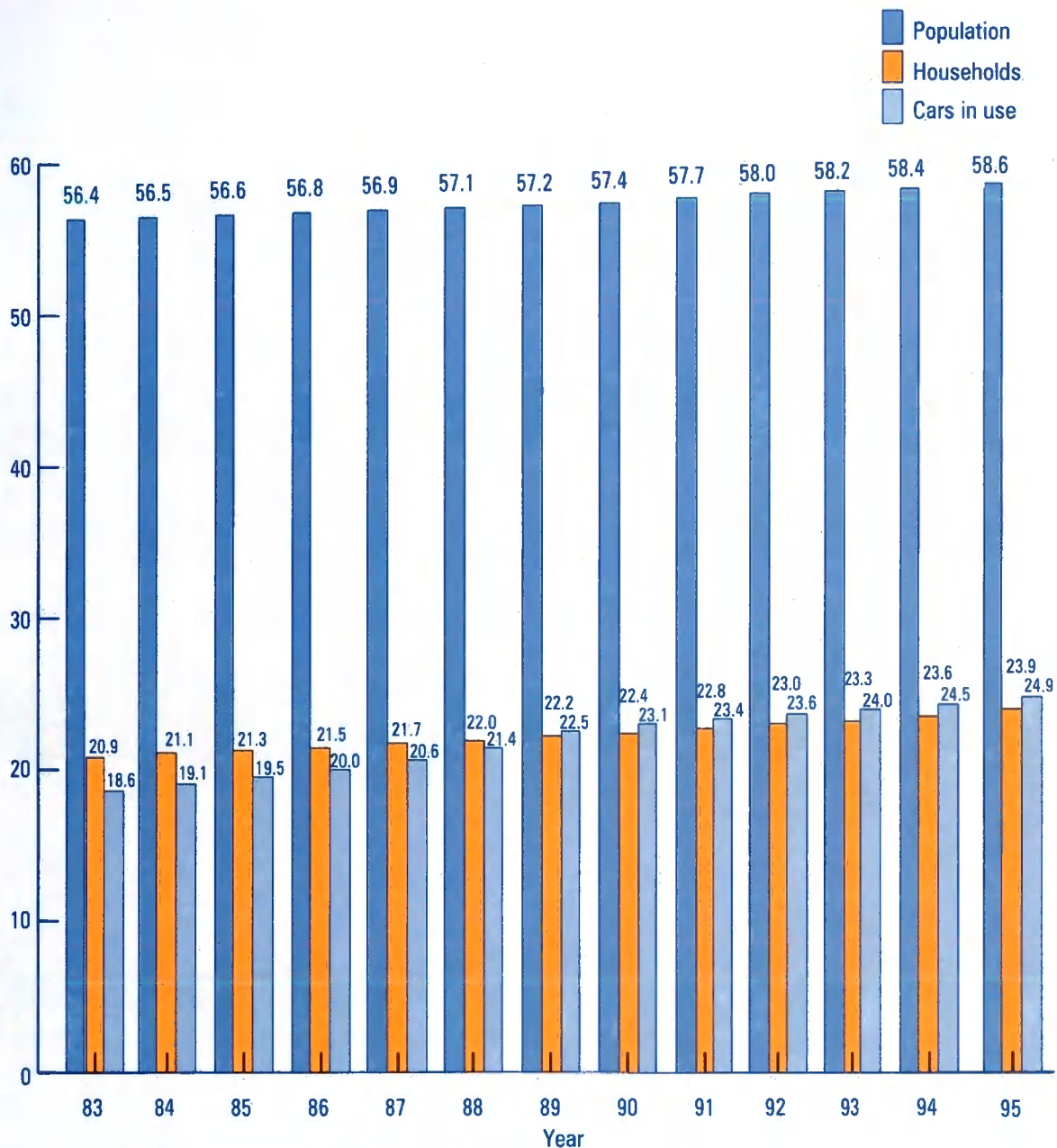
A statistical overview of motoring in Britain

S1 Motoring statistics

S1.1 Car ownership in the UK

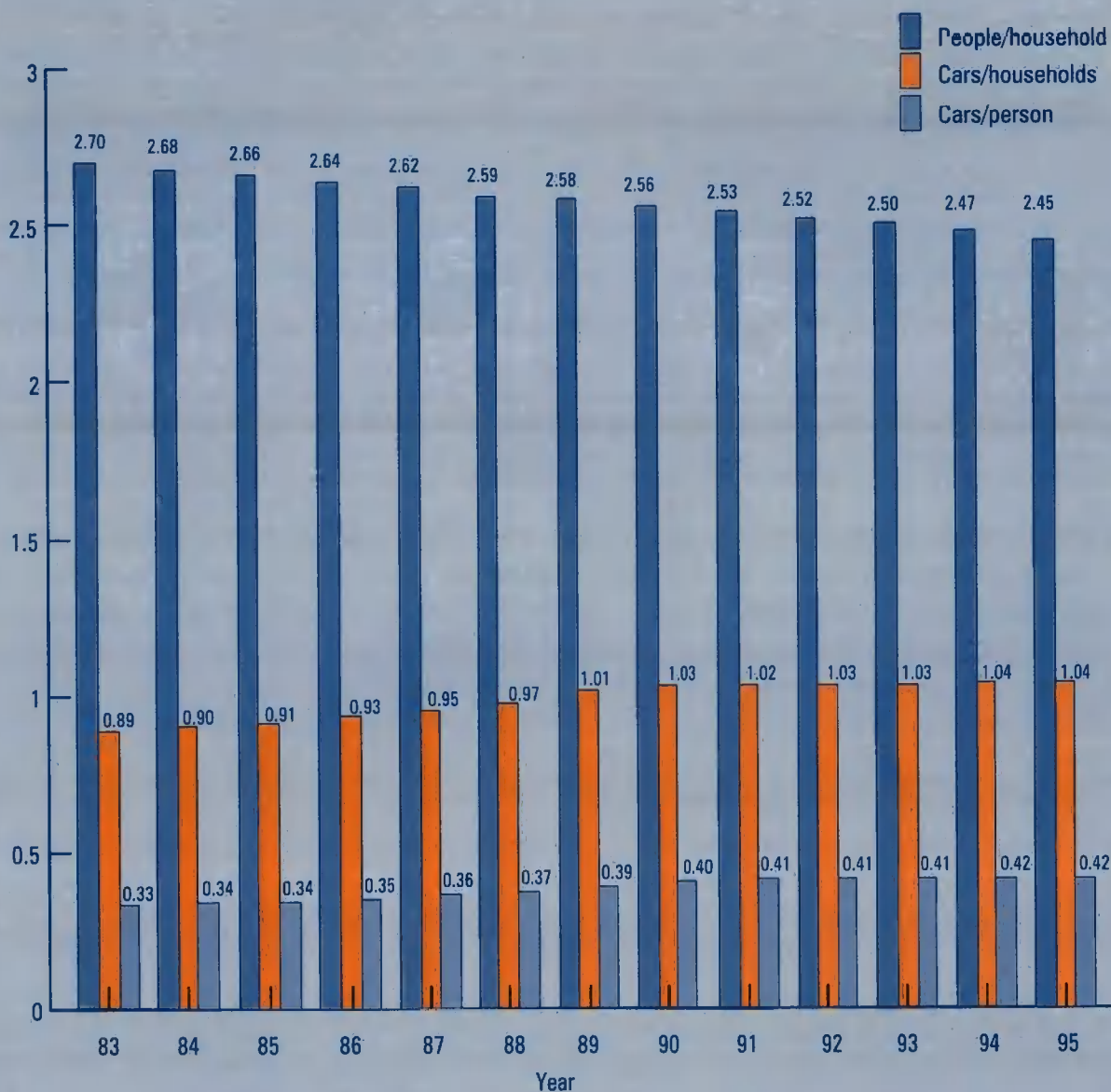
- Car ownership in the UK continues to rise ahead of the pace of population growth.
- The total number of cars in use in the UK is 24.9 million.
- As average household size falls, the UK is seeing a rise in the number of households, together with a steady rise in the number of cars per household. In 1985 the number of cars per household was 0.91, by 1995 this had risen to 1.04.
- Over the past ten years, the number of cars has risen by 5.4 million; of these, 2.3 million came from the increasing number of households and 3.1 million from the growth in the number of cars per household.

Figure S1.1 Car ownership in the UK (1)
Millions



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

Figure S1.2 Car ownership in the UK (2)



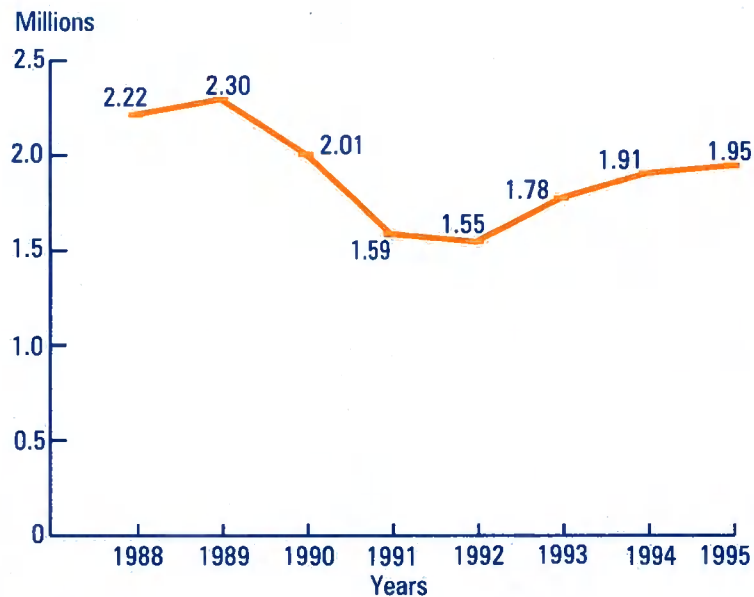
Source: SMMT for cars in use including lapsed vehicles, Department of Environment for households, Government Actuary for population.

S1.2 New car sales

- Following the large recession in the new car market between 1989 and 1992, new car sales have recovered, but at a slow rate. The current levels are still only 85% of the 1989 peak of 2.3 million.
- New car sales in 1995 were 1.95 million, an increase of just 2% over 1994.

Figure S1.3 New car sales

Millions

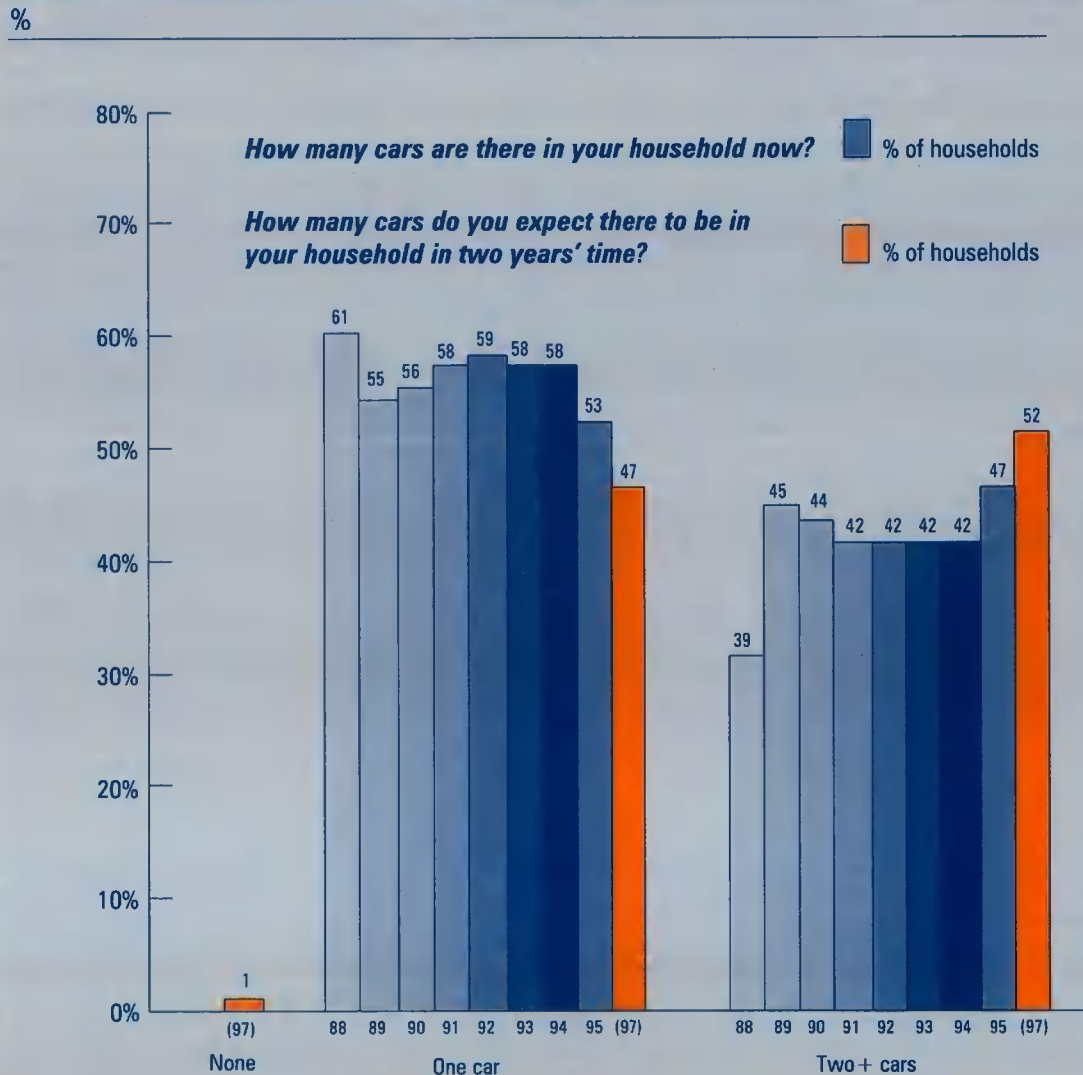


Source: SMMT

S1.3 Expectations of future levels of ownership

- There had been an increase in multi-car households, from 39% of car owning households in 1988, to 47% of car owning households today.
- People are optimistic that they will own more cars in the future. 52% of drivers expect to have two or more cars in their household in two years' time, compared to 47% of drivers with two or more cars in their household now.
- Based on current drivers' expectations, car ownership will increase by 6% in two years' time, from 25.5 million to 27.1 million.

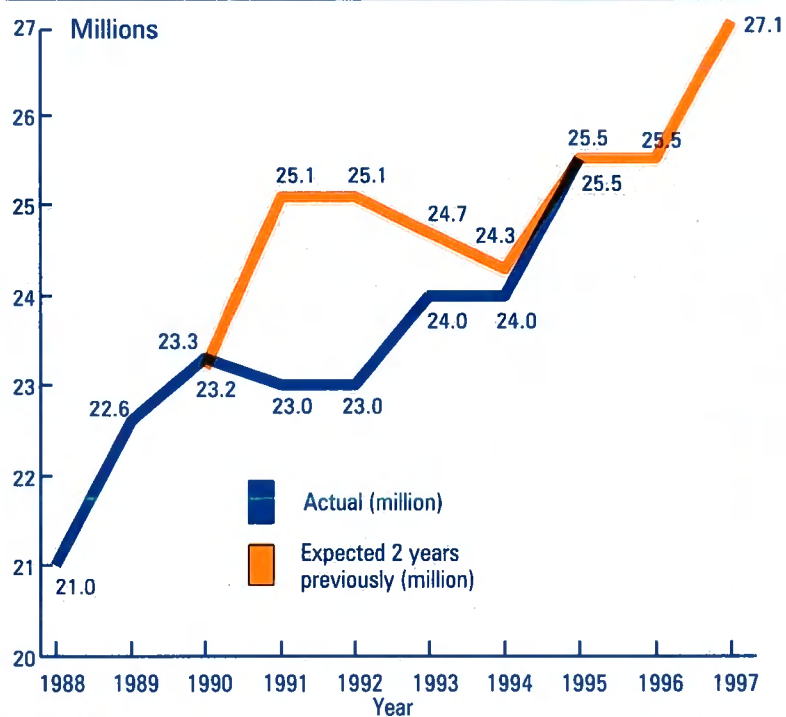
Figure S1.4 Current and expected levels of ownership



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S1.5 Grossed up estimates of numbers of cars at time of surveys and expectations in two years' time (1)



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S1.6 Grossed up estimates of numbers of cars in Britain at time of surveys and expectations in two years' time (2)

| | Households in GB (DoE) | Households with cars (OPCS) | Ave. cars per household (MORI) | Grossed up no. of cars | Expectations in Two Years' Time | | |
|------|------------------------------|-----------------------------------|--------------------------------------|------------------------------|---------------------------------|-----------------------|-----------------------------------|
| | m | % | | m | Year of Expectation | Cars per household | Grossed up no. of cars m |
| 1988 | 21.5 | 66 | 1.48 | 21.0 | 1990 | 1.59 | 23.3 |
| 1989 | 21.7 | 66 | 1.58 | 22.6 | 1991 | 1.67 | 25.1 |
| 1990 | 21.9 | 67 | 1.58 | 23.2 | 1992 | 1.63 | 25.1 |
| 1991 | 22.1 | 68 | 1.53 | 23.0 | 1993 | 1.59 | 24.7 |
| 1992 | 22.5 | 67.8 | 1.51 | 23.0 | 1994 | 1.55 | 24.3 |
| 1993 | 22.7 | 68.6 | 1.54 | 24.0 | 1995 | 1.60 | 25.5 |
| 1994 | 22.9 | 69.0 | 1.52 | 24.0 | 1996 | 1.57 | 25.5 |
| 1995 | 23.1e | 69.0e | 1.59 | 25.5 | 1997 | 1.66 | 27.1 |
| 1996 | 23.4e | 69.3e | | | | | |
| 1997 | 23.5e | 69.5e | | | | | |

e= estimated

Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

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

S1.4 Current and expected length of car ownership

- The expected average length of ownership of all cars is unchanged from last year.
- The expected average length of ownership of company cars has fallen from 2.9 years to 2.7 years.

Figure S1.7 Expected length of car ownership

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

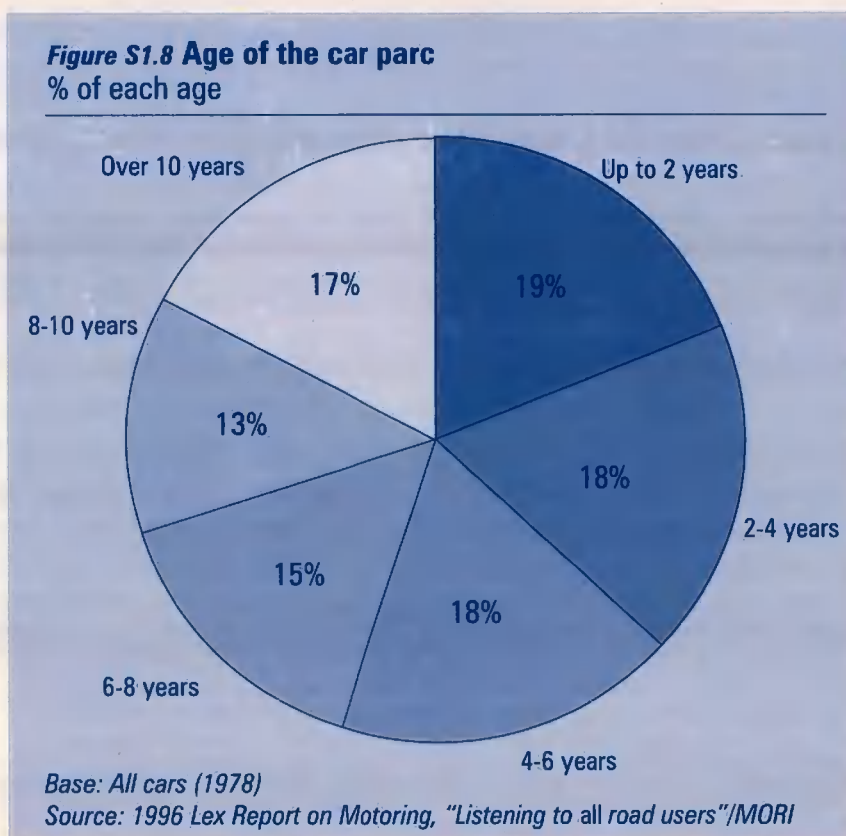
| (Years) | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 |
|-------------|------|------|------|------|------|------|------|
| All | 3.5 | 3.7 | 4.1 | 4.2 | 4.2 | 4.2 | 4.2 |
| Company | 2.2 | 2.5 | 2.8 | 2.8 | 3.0 | 2.9 | 2.7 |
| Private | 3.7 | 3.9 | 4.3 | 4.4 | 4.3 | 4.3 | 4.4 |
| Bought new | 3.2 | 3.8 | 4.1 | 4.3 | 4.2 | 4.2 | 4.2 |
| Bought used | 3.6 | 3.7 | 4.1 | 4.1 | 4.2 | 4.2 | 4.2 |

Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S1.5 Age of the car parc

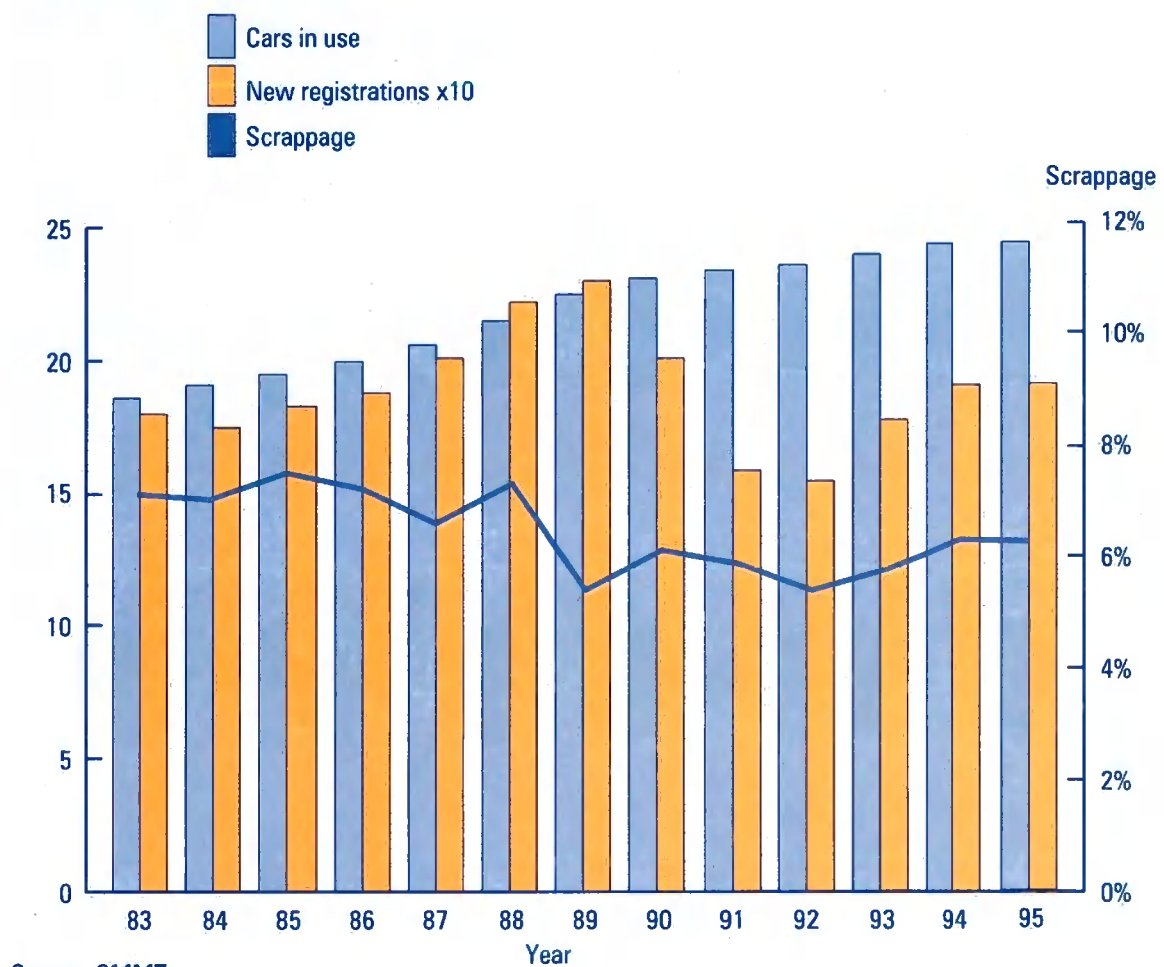
- The average age of the car parc has fallen slightly, with 37% of cars under four years old and 55% under 6 years old. This compares to figures of 34% and 53% last year.



S1.6 Scrappage of cars in the UK

- The number of cars in use in this country has risen by 6% in the last year and 21% since 1988.
- The scrappage rate of cars has remained steady at 6.2%.

Figure S1.9 Scrappage of cars in the UK
Millions



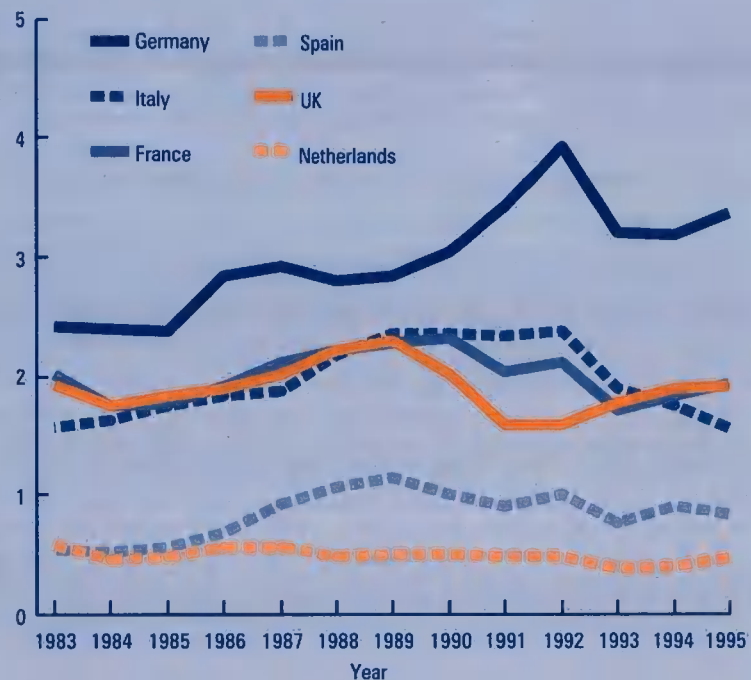
Source: SMMT

S1.7 Registration of new cars in Europe

- Car registrations in the last year have risen in Germany, Italy, Netherlands and the UK. They have fallen in France and Spain.
- The level of registrations in the UK is the third highest in Europe, just behind France, but at only 59% of the level in Germany.

Figure S1.10 Registration of new cars in Europe

Millions

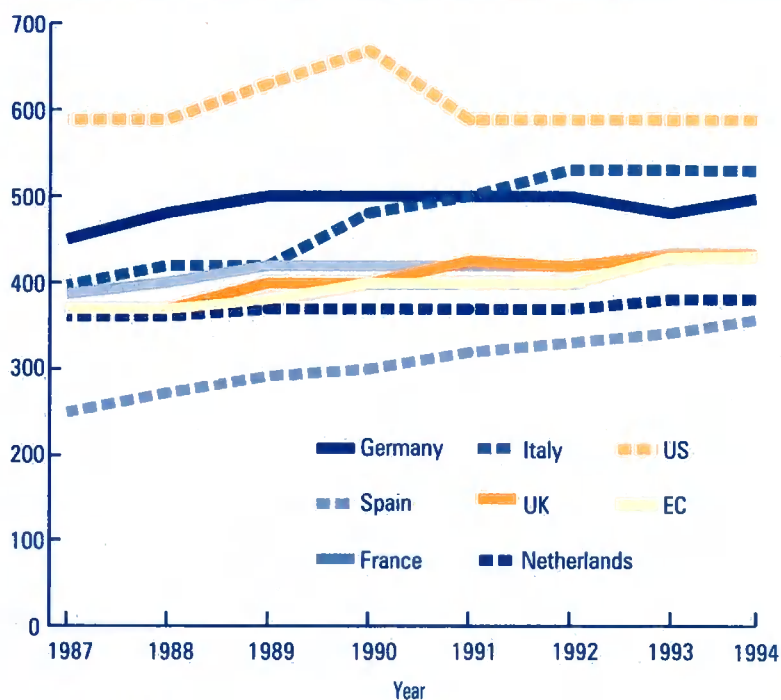


Source: SMMT/from local statistics

S1.8 Cars per 1000 population in Europe and the US

- Convergence in the number of cars per head of population continues across the Western world.
- The levels in the US are still 11% higher than those in the top European country, Italy.
- The UK has higher levels of car ownership per head of population than Spain and the Netherlands, the same level as France, but lower levels than Germany and Italy.

Figure S1.11 Cars per 1000 population in Europe and the US



Source: SMMT

Figure S1.12 Registrations of new cars in the UK by manufacturer

Market shares / %

| | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 |
|------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Audi Volkswagen (VAG) | 5.67 | 5.80 | 5.37 | 5.45 | 5.55 | 5.76 | 5.56 | 5.22 | 4.72 | 5.10 | 5.51 |
| BMW | 1.83 | 1.91 | 1.86 | 1.93 | 2.13 | 2.14 | 2.43 | 2.55 | 2.30 | 2.38 | 2.83 |
| Citroen | 1.50 | 1.83 | 2.29 | 3.02 | 2.89 | 3.03 | 3.36 | 4.04 | 4.54 | 4.42 | 4.12 |
| Fiat | 2.97 | 3.28 | 3.41 | 3.39 | 3.05 | 2.74 | 2.18 | 1.95 | 2.41 | 3.07 | 3.64 |
| Ford | 26.50 | 27.38 | 28.81 | 26.35 | 26.45 | 25.25 | 24.24 | 22.17 | 21.46 | 21.91 | 21.11 |
| GM/Vauxhall | 16.56 | 15.11 | 13.45 | 13.70 | 15.21 | 16.08 | 15.62 | 16.70 | 17.09 | 16.25 | 15.12 |
| Honda | 1.04 | 1.09 | 1.23 | 1.21 | 1.17 | 1.58 | 1.77 | 1.68 | 1.74 | 2.00 | 2.35 |
| Hyundai | 0.28 | 0.40 | 0.45 | 0.51 | 0.37 | 0.35 | 0.50 | 0.59 | 0.52 | 0.64 | 0.72 |
| Jaguar | 0.44 | 0.40 | 0.55 | 0.65 | 0.62 | 0.53 | 0.36 | 0.35 | 0.35 | 0.35 | 0.45 |
| Mercedes | 0.99 | 1.06 | 1.08 | 1.08 | 1.23 | 1.32 | 1.30 | 1.41 | 1.19 | 1.53 | 1.68 |
| Nissan | 5.76 | 5.84 | 5.67 | 6.08 | 6.02 | 5.32 | 4.03 | 4.66 | 5.02 | 4.81 | 4.73 |
| Peugeot/Talbot | 4.02 | 4.60 | 5.03 | 5.72 | 6.04 | 6.16 | 7.26 | 7.78 | 8.02 | 7.67 | 7.37 |
| Renault | 3.85 | 3.68 | 3.91 | 3.86 | 3.83 | 3.36 | 3.99 | 4.59 | 5.24 | 5.90 | 6.19 |
| Rover | 17.90 | 15.80 | 14.99 | 15.01 | 13.57 | 14.01 | 14.40 | 13.51 | 13.38 | 12.83 | 12.34 |
| Saab | 0.46 | 0.55 | 0.52 | 0.48 | 0.53 | 0.59 | 0.58 | 0.62 | 0.51 | 0.49 | 0.59 |
| Toyota | 1.89 | 1.90 | 1.90 | 1.80 | 1.84 | 2.12 | 2.59 | 2.65 | 2.93 | 2.72 | 2.80 |
| Volvo | 3.25 | 3.66 | 3.52 | 3.63 | 3.55 | 3.29 | 2.94 | 2.71 | 2.46 | 2.18 | 2.04 |
| Others | 5.37 | 6.11 | 6.41 | 6.64 | 6.32 | 6.72 | 7.40 | 7.41 | 6.12 | 5.75 | 6.41 |
| Total Market (Million) | 1.83 | 1.88 | 2.01 | 2.22 | 2.30 | 2.01 | 1.59 | 1.59 | 1.78 | 1.91 | 1.95 |

Source: Society of Motor Manufacturers and Traders

S2 Car buying

S2.1 Source of finance

- There has been a rise in financing car purchases through cash and/or loans from within the family, reflecting both an improvement in the economy and a cautious outlook from the public.
- There has been a fall in the proportion of new cars “bought” through contract purchasing, contract hire and finance leasing in the last year, from 16% to 13% of the total.
- There has been a fall in the proportion of used cars bought from franchised dealers through hire purchase or finance company loans, from 30% of the total in 1994 to 23% of the total now.

Figure S2.1 Source of finance

%

| | All | | | | | | Bought New | | | | | | Bought Used | | | | | |
|--|-----|-----|-----|-----|-----|-----|------------|-----|-----|-----|-----|-----|-------------|-----|-----|-----|-----|-----|
| | '90 | '91 | '92 | '93 | '94 | '95 | '90 | '91 | '92 | '93 | '94 | '95 | '90 | '91 | '92 | '93 | '94 | '95 |
| Cash/loans from family | 44 | 45 | 47 | 45 | 47 | 50 | 47 | 42 | 42 | 39 | 44 | 46 | 46 | 46 | 51 | 49 | 49 | 52 |
| Finance Co loan/(+cash) | 15 | 16 | 19 | 16 | 16 | 13 | 20 | 16 | 24 | 19 | 16 | 13 | 11 | 15 | 17 | 14 | 16 | 13 |
| Bank loan (+cash) | 12 | 15 | 12 | 11 | 9 | 7 | 8 | 12 | 9 | 11 | 8 | 6 | 15 | 18 | 14 | 11 | 10 | 9 |
| Hire purchase/(+cash) | 11 | 11 | 7 | 10 | 9 | 10 | 15 | 15 | 10 | 11 | 8 | 12 | 7 | 8 | 5 | 10 | 10 | 8 |
| Contract purchasing (eg Ford Options) | n/a | n/a | n/a | n/a | 3 | 2 | n/a | n/a | n/a | n/a | 9 | 5 | n/a | n/a | n/a | n/a | * | 1 |
| Contract hire/full service leasing | 1 | 2 | 2 | 3 | 2 | 1 | 2 | 3 | 3 | 6 | 4 | 4 | 0 | * | 1 | 1 | * | 0 |
| Building Society loan/(+cash) | 1 | 3 | 3 | 2 | 2 | 2 | 2 | 0 | 1 | 1 | 0 | 0 | 1 | 5 | 3 | 2 | 3 | 2 |
| Finance leasing | 3 | 1 | 2 | 2 | 3 | 2 | 5 | 2 | 3 | 5 | 3 | 4 | 1 | 1 | 1 | * | 2 | 1 |
| Other | 3 | 3 | 4 | 4 | 4 | 5 | 3 | 4 | 7 | 5 | 7 | 8 | 2 | 3 | 3 | 3 | 3 | 4 |
| Don't know/refused | 10 | 4 | 4 | 7 | 5 | 8 | 2 | 6 | 1 | 3 | 3 | 4 | 17 | 4 | 5 | 10 | 7 | 11 |

Base: All responsible for buying a new car or second hand car at a dealer in the last two years

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S2.2 Source of finance - used cars

%

| | All (234) | Franchise dealer (112) | Non- Franchise dealer (122) |
|---------------------------------------|----------------------|---------------------------------------|--|
| Cash/loans from family | 51 | 49 | 53 |
| Finance Co. loan/(and cash) | 13 | 14 | 11 |
| Bank loan/(and cash) | 9 | 9 | 8 |
| Hire purchase/(and cash) | 8 | 9 | 7 |
| Contract purchasing (eg Ford Options) | 1 | 3 | 0 |
| Contract hire/full service leasing | 0 | 0 | 0 |
| Building society loan/(and cash) | 3 | 3 | 2 |
| Finance leasing | 0 | 0 | 1 |
| Other | 3 | 5 | 2 |
| Don't know/refused | 12 | 9 | 14 |

Base: All responsible for buying a used car at a dealer in the last two years (234)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S2.2 Source of purchase

- There has been a rise since 1994 in the proportion of used cars bought privately from 21% to 24% of the total.
- There has also been a rise in the proportion of used cars sold through used car dealers, from 15% in 1989 to 27% in 1995.
- Franchise dealers have seen their share of the used car market fall from 28% last year to 24% in 1995.
- Franchise dealers dominate the 0-3 year old used car market with a 48% share.
- Private deals and purchases from friends and relatives account for nearly half of cars bought that are over 6 years old.

Figure S2.3 Source of purchase - used cars by age of car

%

| | All (455) | Up to 3 years (146) | 3-6 years (117) | Over 6 years (182) |
|-----------------------------------|--------------|---------------------------|-----------------------|--------------------------|
| Private deal | 24 | 9 | 16 | 24 |
| Used car dealer | 27 | 22 | 33 | 25 |
| Friend/relative | 17 | 11 | 9 | 25 |
| Franchise dealer for your make | 17 | 33 | 24 | 6 |
| Franchise dealer for another make | 8 | 15 | 12 | 3 |
| Car auction | 4 | 6 | 5 | 3 |
| Gift | 0 | 0 | 0 | 1 |
| Other | 5 | 2 | 1 | 2 |

Base: All responsible for buying a second hand car in last two years (455)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S2.4 Source of purchase - gross numbers sold

Total figures/millions

| | Annual average over last two years/millions |
|-------------------|--|
| Total cars bought | 6.6 |

New cars

Bought from:

| | |
|---|------------|
| Franchise selling only own make | 1.3 |
| Franchise dealer selling more than one make | 0.3 |
| | <u>1.6</u> |

N.B. This excludes cars bought directly by companies for their employees

Used cars

Bought from:

| | |
|-----------------------------------|------------|
| Used car dealer | 1.35 |
| Franchise dealer for own make | 0.8 |
| Private deal | 1.25 |
| Friend/relative | 0.85 |
| Franchise dealer for another make | 0.4 |
| Car auction | 0.2 |
| Gift/other | 0.1 |
| | <u>5.0</u> |
| (Any franchise) | 1.2 |

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S2.5 Which of these did you buy your car from? (1)

%

| New cars | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 |
|---|------|------|------|------|------|------|------|
| Franchise dealer selling only your make | 85% | 83% | 79% | 87% | 82% | 83% | 80% |
| Franchise dealer selling more than one make | 13% | 14% | 16% | 10% | 15% | 15% | 11% |

Base: Bought new in the last two years

Figure S2.6 Which of these did you buy your car from? (2)

%

| Used cars | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 |
|--|------|------|------|------|------|------|------|
| Private deal | 28% | 28% | 27% | 22% | 25% | 20% | 24% |
| Used car dealer | 15% | 18% | 18% | 20% | 21% | 26% | 27% |
| Franchise dealer for your make | 16% | 13% | 15% | 16% | 17% | 20% | 16% |
| Friend/relative | 22% | 19% | 15% | 16% | 16% | 20% | 17% |
| Non-franchise dealer selling new and used cars | 8% | 13% | 11% | 14% | 10% | n/a | n/a |
| Franchise dealer for another make | 7% | 6% | 7% | 5% | 6% | 8% | 8% |
| Car auction | 2% | 3% | 3% | 3% | 4% | 2% | 4% |
| Gift | 1% | * | * | 1% | * | 1% | * |

Base: Bought used in the last two years

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S2.4 The purchase cost of cars

- The average price paid for cars has risen by 10% in the last year. The changes in average price paid will be both a function of real price changes and changes in the mix of cars sold (reflected in average engine size).
- The average engine size of the cars in this year's survey is slightly higher than last year's. This is supported by Department of Transport data, which shows that the number of cars with engines over two litres has risen by 17% in the last year, with the average engine size also rising slightly.

Figure S2.7 The purchase cost of car driven most often
£'s

| | Average Cost | | | |
|-----------------|--------------|-----------|-----------|-----------|
| | 1992 £ | 1993 £ | 1994 £ | 1995 £ |
| All cars | 4,700 | 5,500 | 5,700 | 6,250 |
| New | 9,100 | 9,800 | 10,200 | 11,200 |
| Used | 3,200 | 3,700 | 3,800 | 4,200 |

Car bought privately

| | | | | |
|------|-------|-------|-------|-------|
| New | 8,200 | 8,800 | 9,000 | 9,500 |
| Used | 3,100 | 3,500 | 3,700 | 3,900 |

Company car households

| | | | | |
|------|--------|--------|--------|--------|
| New | 13,100 | 13,000 | 13,800 | 15,600 |
| Used | 5,900 | 7,800 | 8,500 | 7,500 |

Age of driver

| | | | | |
|-------|-------|-------|-------|-------|
| 17-24 | 3,000 | 3,000 | 3,100 | 3,000 |
| 25-34 | 4,200 | 4,800 | 5,100 | 5,600 |
| 35-54 | 5,000 | 6,400 | 6,100 | 7,200 |
| 55-64 | 5,700 | 6,400 | 6,900 | 7,000 |
| 65+ | 5,300 | 5,500 | 6,000 | 6,600 |

Source of Purchase

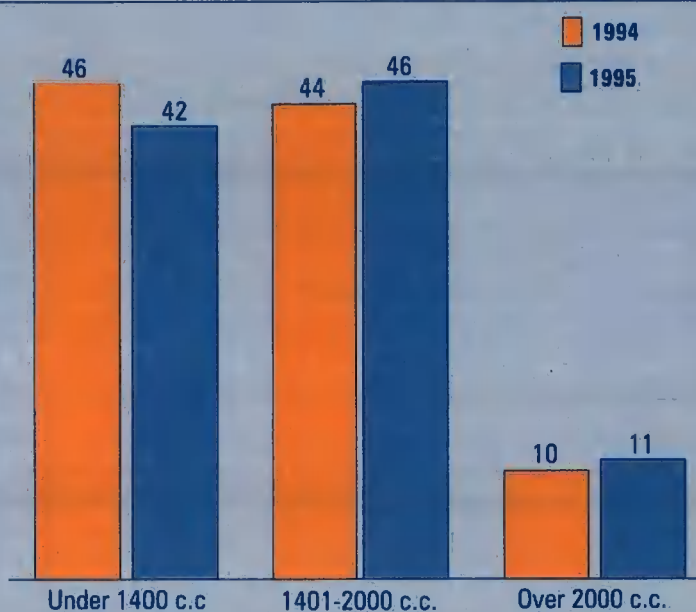
| | | | |
|------------------------------------|-------|-------|-------|
| Used car | | | |
| – private individual, did not know | 1,800 | 2,500 | 2,700 |
| – friend/relative | 1,900 | 2,400 | 2,500 |
| – dealer, only used cars | 3,600 | 3,800 | 4,400 |
| – new car dealer, your make | 7,300 | 7,300 | 8,300 |
| – new car dealer, another make | 4,600 | 5,200 | 6,500 |
| – auction | 3,000 | 2,500 | 3,900 |

Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S2.8 Engine size of cars (1)

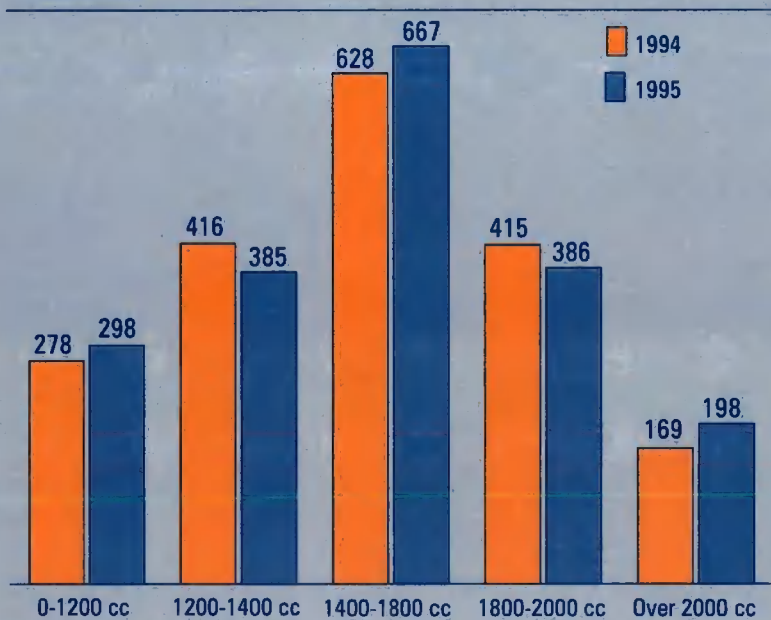
%



Base: Cars bought in previous two years (593)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

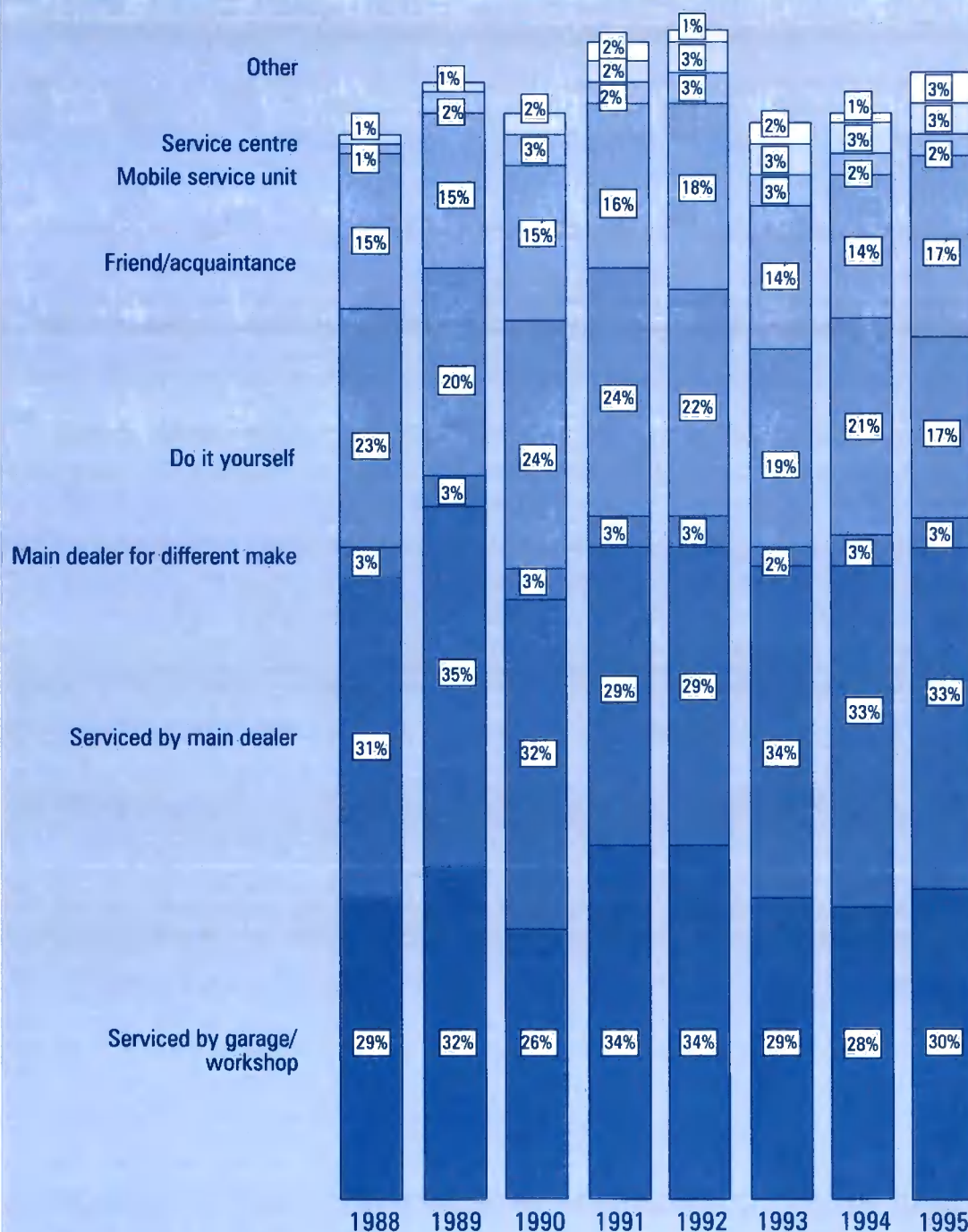
Figure S2.9 Engine size of cars (2)
Thousands



N.B. 1995 figures are for the 12 month period up to November 1995.

Source: Department of Transport

Figure S3.1 Service location
% using each location



Total adds to more than 100% because of use of more than one type of servicing.
N.B. Mobile service included in "other" in 1988 and 1989

Base: All with responsibility for getting car serviced

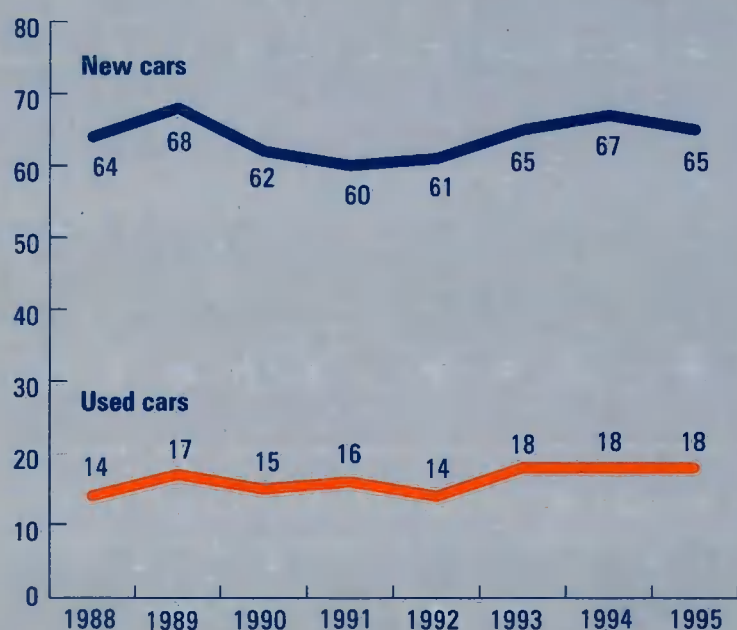
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S3 Servicing and repair

S3.1 Responsibility for servicing

- The proportion of people servicing their car themselves has fallen from 21% last year to 17% in 1995.

Figure S3.2 Service location by new and used
% using franchise dealers for servicing



Base: All with responsibility for getting car serviced

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S5.3 Frequency of service and repair

- Service and repair intervals have got marginally shorter over the past year.
- Since 1992, service intervals have remained broadly static, whilst repair intervals have fallen. There is no evidence on changes in the quantity of work done at each service over this period, although spending on servicing has risen by around 2% per annum over the past ten years (with maintenance inflation taken out), according to government figures.

Figure S3.3 Frequency of servicing and repairs

| | Base | Average no. of services | | | | Average no. of repairs | | | |
|------|------|-------------------------|------|------|------|------------------------|------|------|------|
| | | 1992 | 1993 | 1994 | 1995 | 1992 | 1993 | 1994 | 1995 |
| All | 926 | 1.6 | 1.5 | 1.5 | 1.5 | 0.9 | 0.8 | 0.7 | 0.7 |
| New | 272 | 1.6 | 1.6 | 1.6 | 1.7 | 0.6 | 0.6 | 0.5 | 0.5 |
| Used | 597 | 1.5 | 1.4 | 1.4 | 1.5 | 1.0 | 0.9 | 0.8 | 0.8 |

Age of car

| | | | | | | | | | |
|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 0-3 years | 250 | 1.5 | 1.6 | 1.6 | 1.6 | 0.5 | 0.5 | 0.4 | 0.5 |
| 3-6 years | 231 | 1.5 | 1.6 | 1.6 | 1.5 | 0.8 | 0.7 | 0.7 | 0.6 |
| Over 6 years | 373 | 1.6 | 1.4 | 1.3 | 1.5 | 1.3 | 1.1 | 0.9 | 1.0 |

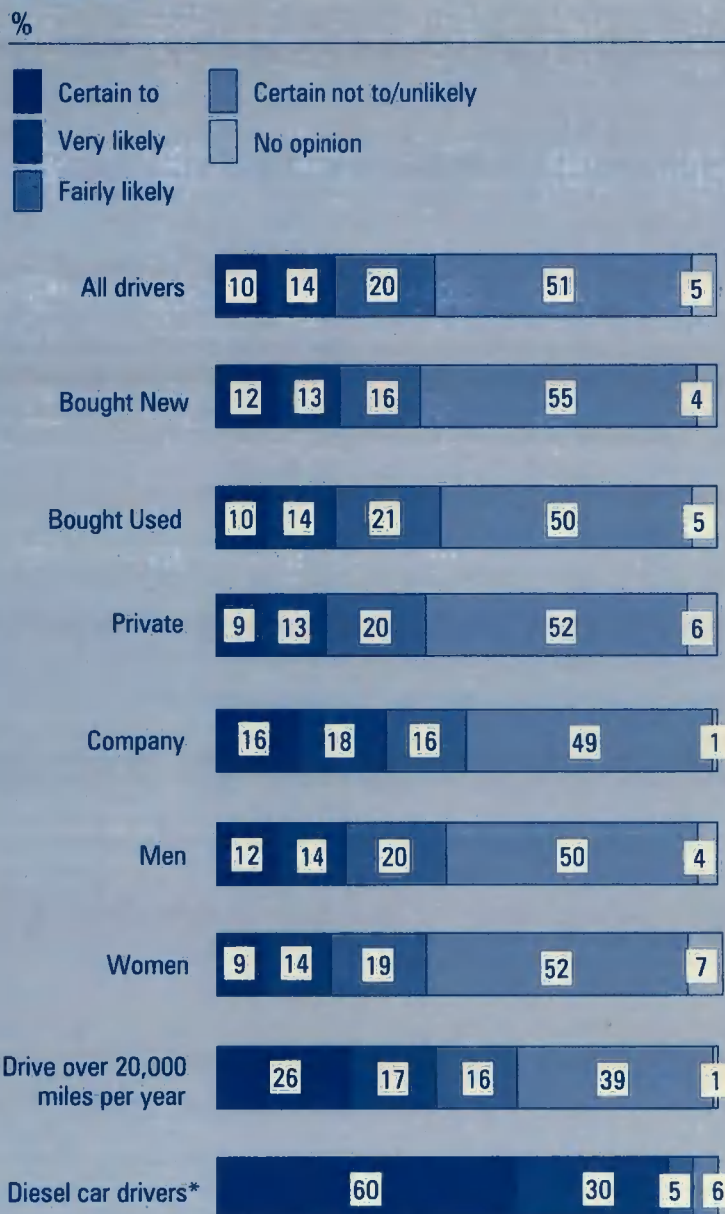
Miles driven/year

| | | | | | | | | | |
|-------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 0-6000 | 238 | 1.4 | 1.1 | 1.2 | 1.2 | 0.9 | 0.7 | 0.6 | 0.6 |
| 6001-20,000 | 546 | 1.5 | 1.5 | 1.4 | 1.5 | 0.9 | 0.7 | 0.7 | 0.7 |
| 20,000+ | 57 | 2.4 | 2.6 | 2.5 | 2.7 | 1.0 | 1.0 | 0.7 | 1.0 |

Base: All serviced by garage/dealer

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S4.1 Likelihood of considering buying a diesel car in the future



Base: All drivers (1229) *Base: All whose car runs on diesel (114)

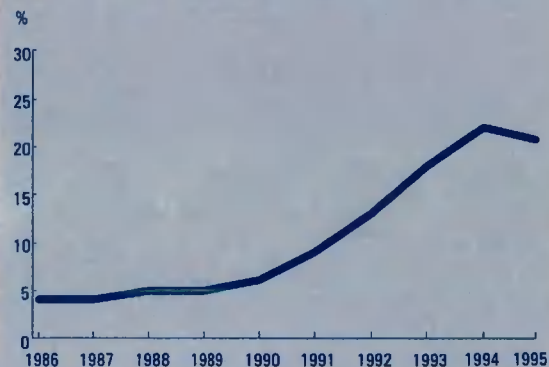
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S4 Fuel

S4.1 Diesel sales and prospects

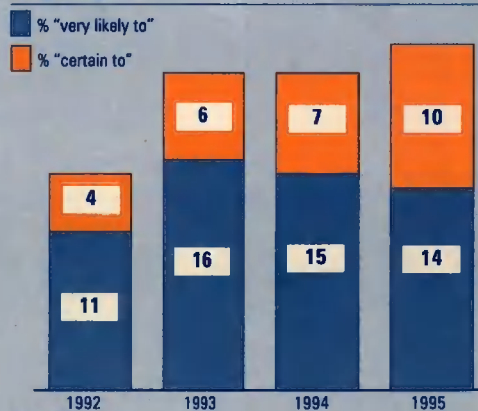
- Diesel sales grew by over 300% between 1991 and 1994.
- Diesel sales in 1995 accounted for 21% of all new car sales, but have fallen by 1.7 percentage points over the past year.
- There has been a sharp rise since 1992 in those "certain to" consider buying a diesel next time, from 4% to 10%.
- 44% say they are likely to consider buying a diesel car next time, with 10% saying they are certain to consider buying a diesel. (N.B. The interviews took place before recent reports on the particulates in diesel exhausts.)
- Those most likely to say they will consider a diesel next time are company car drivers, high-mileage drivers and current diesel drivers.

Figure S4.2 Sales of diesel cars
% share of new registrations



Source: SMMT

Figure S4.3 Trend in consideration of buying a diesel car in the future
% agreeing



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

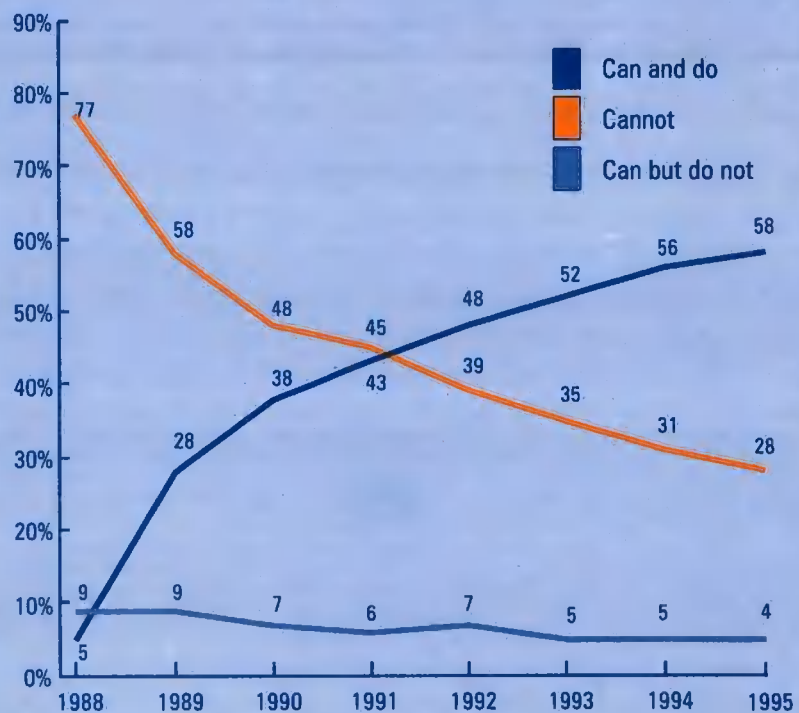
S4.2 Unleaded fuel sales and prospects

- Of the cars that run on petrol, 62% can now run on unleaded petrol, rising from just 14% in 1988.
- Of those cars that can run on unleaded petrol, 94% now use unleaded fuel, rising from 36% in 1988.

Figure S4.4 Use of unleaded petrol

Q. Can your car run on unleaded petrol?

Q. Do you usually buy unleaded petrol?



Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S5 Driver profiles

S5.1 Profile of car buyers

- Although fewer women buy cars, those that buy are more likely to buy new cars than men are.
- Older people of working age are much more likely to buy new cars than younger people.
- Over a third of purchases by people over 55 years old are new cars.
- The proportion of car buyers buying new cars has remained roughly static at 24% of car buyers, down from its high of 30% in 1989.

Figure S5.1 Profile of Britain's car drivers

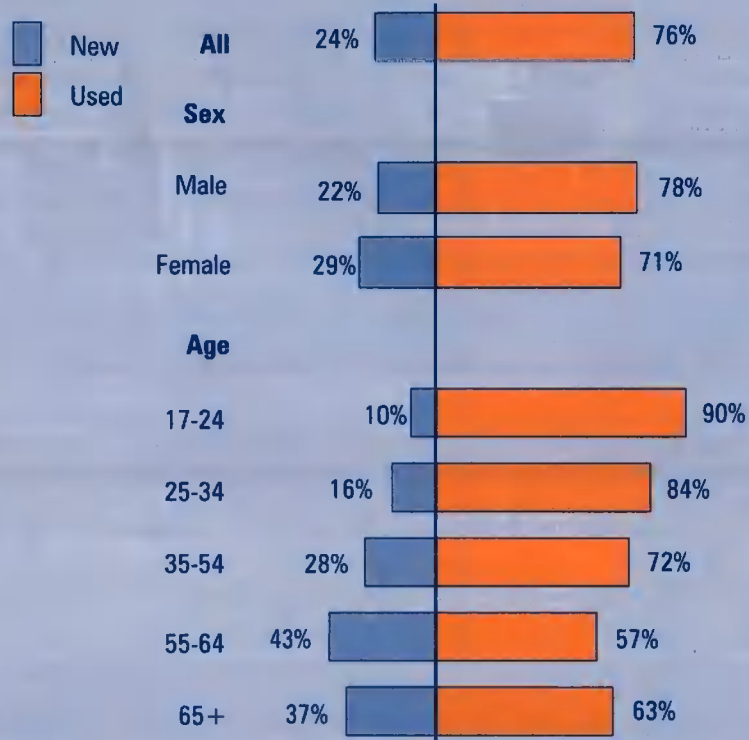
%

| | General Public | | Drivers | | | | |
|--------------|----------------|------|---------|------|------|------|------|
| | 1995 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 |
| | % | % | % | % | % | % | % |
| Sex | | | | | | | |
| Male | 48 | 59 | 59 | 57 | 58 | 58 | 59 |
| Female | 52 | 41 | 41 | 43 | 42 | 41 | 41 |
| Age | | | | | | | |
| 17-24 | 14 | 11 | 11 | 9 | 10 | 9 | 10 |
| 25-34 | 21 | 26 | 24 | 28 | 28 | 26 | 28 |
| 35-54 | 33 | 40 | 39 | 36 | 39 | 40 | 39 |
| 55-64 | 12 | 11 | 13 | 14 | 12 | 12 | 12 |
| 65+ | 20 | 12 | 13 | 13 | 11 | 12 | 11 |
| Class | | | | | | | |
| AB | 21 | 26 | 25 | 23 | 28 | 24 | 29 |
| C1 | 27 | 27 | 28 | 28 | 28 | 32 | 31 |
| C2 | 23 | 31 | 29 | 29 | 24 | 25 | 24 |
| DE | 29 | 17 | 18 | 20 | 20 | 19 | 16 |

Base: All drivers

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S5.2 Profile of car buyers in the last 2 years
% buying



Base: All buying car in last 2 years (605)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Figure S5.3 Proportion buying new and used
%

| | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 |
|---|------|------|------|------|------|------|------|
| Proportion of drivers who bought cars in the last two years | 44 | 45 | 45 | 44 | 47 | 44 | 50 |

Base: All drivers

| | | | | | | | |
|--------------------|----|----|----|----|----|----|----|
| Proportion buying: | | | | | | | |
| New | 30 | 28 | 24 | 22 | 25 | 23 | 24 |
| Used | 70 | 72 | 76 | 78 | 75 | 77 | 76 |

Base: All buying car in last two years

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S5.2 Profile of new car buyers

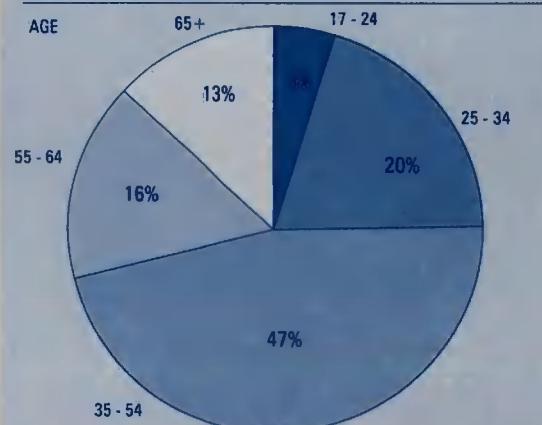
- Nearly half of new car buyers are between 35 and 54 years old, accounting for 900,000 sales.
- Nearly 1 in 7 new car buyers are over 65 years old, accounting for 250,000 new cars.
- Women account for over a third of all new cars purchased or 700,000 cars.

New car buyers

| | | |
|-----|-------|--------------|
| Age | 17-24 | 0.1 million |
| | 25-34 | 0.3 million |
| | 35-54 | 0.75 million |
| | 55-64 | 0.25 million |
| | 65+ | 0.2 million |

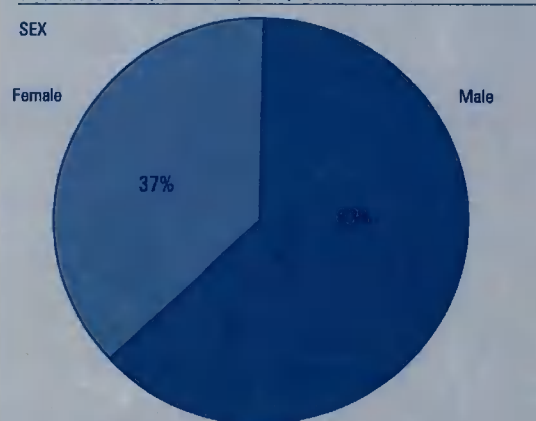
| | | |
|-----|--------|-------------|
| Sex | Male | 1.0 million |
| | Female | 0.6 million |

Figure S5.4 Profile of new car buyers*(1) %
*excludes cars provided by companies



Base: All bought new cars in the last two years (165)
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

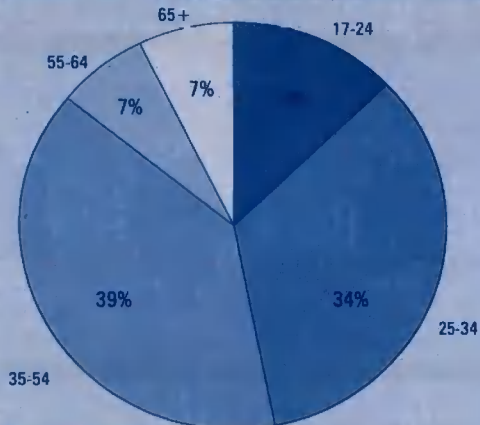
Figure S5.5 Profile of new car buyers*(2) %
*excludes cars provided by companies



Base: All bought new cars in the last two years (165)
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S3.2 Profile of used car buyers

Figure S5.6 Profile of used car buyers (1)



Base: All bought used cars in last two years (424)
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

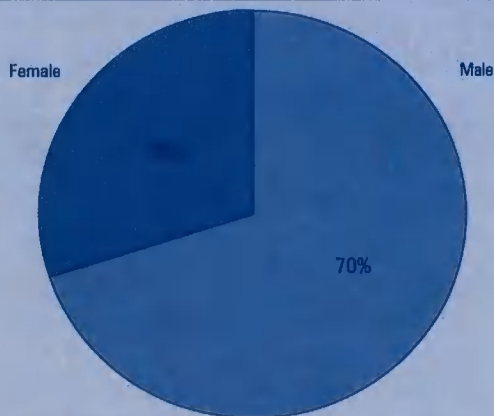
- Nearly 1 in 7 used car buyers is under 24 years old.
- Only 1 in 7 used car buyers is over 55 years old.

Used car buyers

| | | |
|-----|-------|--------------|
| Age | 17-24 | 0.65 million |
| | 25-34 | 1.7 million |
| | 35-54 | 1.9 million |
| | 55-64 | 0.35 million |
| | 65+ | 0.35 million |

| | | |
|-----|--------|-------------|
| Sex | Male | 3.5 million |
| | Female | 1.5 million |

Figure S5.7 Profile of used car buyers (2)



Base: All bought used cars in last two years (424)
Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S5.4 Driver profile by region

Across all the regions the concern with greatest net support is air pollution.

Across all the regions, except London, the policy change most people support is for improved public transport. In London it is for reducing fares on public transport.

Road-rage is common across all the regions.

Drivers in London

- Drivers in London are the greatest users of public transport and, with those in the Midlands, drive the least miles per annum.
- London drivers are keenest to use public transport even more if it was to improve.
- More drivers in London and the South-East than elsewhere believe congestion is a problem in their local area.
- There are relatively low levels of satisfaction with car dealerships and car servicing in London.

Drivers in the rest of the South-East and East Anglia

- Drivers in the South-East drive more miles than those from any other region.
- Nearly seven in ten of the adult population are regular drivers in the South-East.
- 11% of drivers in the South-East are under 25 years old.

Drivers in the South-West and Wales

- Fewer people in the South-West and Wales think congestion is a problem in their local area than elsewhere in Britain.
- Nearly seven in ten adults are regular drivers in the South-West and Wales - the joint highest level with the South-East and East Anglia.
- More drivers do their own servicing in the South-West and Wales than elsewhere in the country.

Drivers in the Midlands

- Drivers in the Midlands are more dependent on their car than those sampled in other regions.
- 54% of car owning households have two or more cars in the Midlands.
- 11% of cars in the Midlands are diesels.

Drivers in the North of England

- Just 37% of drivers are female in the North of England.
- 12% of cars in the North are diesels.

Drivers in Scotland

- Less than one in six people in Scotland think congestion is bad at peak times in their local area.
- Scotland has the lowest proportion of persistent speeders in Britain.
- Scotland has the lowest level of support for the aims of protesters against new roads being built in the countryside.
- Fewer drivers in Scotland than elsewhere say they would use public transport more if it was improved.

Figure S5.8 Driver profile by region

| | Base | All (1229) | London (214) | Rest of South-East/ East Anglia (297) | South- West/ Wales (169) | Midlands (208) | North of England (260) | Scotland (81) |
|---|--------------------------------|--------------------------------|--------------------------------|--|-----------------------------------|--------------------------------|--------------------------------|--------------------------------|
| 1. Reliance on the car | | | | | | | | |
| Mileage per annum | | 10,400 | 10,100 | 11,300 | 10,400 | 9,300 | 10,300 | 10,800 |
| % normally using car for leisure/ entertainment journeys | | 86 | 73 | 92 | 81 | 96 | 85 | 87 |
| 2. Their driving experience | | | | | | | | |
| Issues of most concern with greatest net support | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution |
| % saying congestion "very bad" 5 miles around their home at peak times | | 24 | 28 | 32 | 15 | 19 | 27 | 17 |
| % been victims of road-rage in last 12 months | | 51 | 49 | 48 | 60 | 47 | 51 | 54 |
| % persistent speeders | | 20 | 19 | 19 | 17 | 21 | 23 | 14 |
| 3. Views on Transport policy | | | | | | | | |
| Policy with greatest support for introduction | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport |
| % supporting aims of anti-road protesters | | 59 | 62 | 62 | 59 | 62 | 59 | 45 |
| % supporting aims of anti-traffic protesters | | 82 | 85 | 86 | 85 | 80 | 78 | 79 |
| % agreeing "I would use my car less if public transport were better" | | 41 | 53 | 48 | 43 | 37 | 35 | 31 |
| 4. Views on the car industry | | | | | | | | |
| % very satisfied with dealer where bought car | | 53 | 45 | 53 | 54 | 51 | 51 | 59 |
| % very satisfied with service centre or workshop | | 63 | 55 | 63 | 68 | 66 | 64 | 60 |
| A statistical profile | | | | | | | | |
| % of population who are regular drivers | | 62 | 55 | 69 | 69 | 57 | 58 | 55 |
| % of drivers where car drive most often bought from new | | 29 | 31 | 29 | 32 | 31 | 25 | 33 |
| % of regular car drivers in households with more than one car | | 47 | 45 | 49 | 47 | 54 | 44 | 41 |
| % of drivers who are female | | 41 | 41 | 44 | 41 | 42 | 37 | 41 |
| % of drivers that are under 25 years old | | 9 | 10 | 11 | 10 | 9 | 10 | 4 |
| % of drivers that are over 65 years old | | 11 | 13 | 11 | 12 | 10 | 11 | 10 |
| % of drivers doing DIY servicing | | 13 | 12 | 13 | 18 | 13 | 12 | 10 |
| % of cars that run on diesel | | 9 | 2 | 8 | 7 | 11 | 12 | 9 |

Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S5.5 Profile of driver types

Women compared to men

Men are more likely than women to:

- be drivers
- drive more miles
- persistently exceed the speed limit
- not support the aims of anti-road building protesters
- do their own car servicing

Young people compared to older people

Young people are more likely than old people to:

- be drivers
- drive more miles
- have been the victims of road-rage
- persistently exceed the speed-limit
- support the aims of anti-road building protesters
- be in multi-car households
- do their own servicing

Drivers with children versus drivers with no children

Drivers with children in the house are more likely than those without children at home to:

- be drivers
- drive more miles

City dwellers compared to country dwellers

People who live in more rural areas are more likely than those who live in cities to:

- be drivers
- drive more miles
- live in an uncongested area
- not support the aims of anti-road building protesters
- not to use public transport more if it was improved
- live in a multi-car household
- drive a diesel

AB's versus C2's

AB's are more likely than C2's to:

- be drivers
- drive more miles
- be more dependent on the car
- have a new car
- live in a multi-car household
- not do their own servicing

Figure S5.9 Profile of driver groups

| | All | Male | Female | 17-24 | 65+ | Households with children | Households without children | City dwellers | Country dwellers | Professionals (AB's) | Manual workers (C2's) |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base | (1229) | (775) | (454) | (100) | (122) | (511) | (718) | (262) | (263) | (425) | (212) |
| 1. Reliance on the car | | | | | | | | | | | |
| Mileage per annum | 10400 | 11800 | 8300 | 11100 | 5700 | 11100 | 10000 | 10200 | 11000 | 11200 | 9500 |
| % normally using car for leisure/entertainment journeys | 86 | 87 | 86 | 84 | 90 | 88 | 85 | 78 | 89 | 90 | 82 |
| 2. Their driving experience | | | | | | | | | | | |
| Issues of most concern with greatest net support | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution | Air pollution |
| % saying congestion "very bad" 5 miles around their home at peak times | 25 | 23 | 27 | 23 | 26 | 25 | 25 | 35 | 9 | 25 | 20 |
| % been victims of road-rage in last 12 months | 50 | 53 | 46 | 65 | 30 | 52 | 49 | 47 | 49 | 53 | 50 |
| % persistent speeders | 20 | 24 | 13 | 26 | 10 | 17 | 21 | 19 | 17 | 23 | 17 |
| 3. Views on Transport policy | | | | | | | | | | | |
| Policy with greatest support for introduction | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport | Improve public transport |
| % supporting aims of anti-road protesters | 59 | 55 | 65 | 70 | 53 | 60 | 58 | 67 | 55 | 60 | 54 |
| % supporting aims of anti-traffic protesters | 82 | 81 | 85 | 83 | 80 | 84 | 81 | 83 | 82 | 87 | 81 |
| % agreeing "I would use my car less if public transport were better" | 41 | 41 | 40 | 51 | 44 | 38 | 42 | 48 | 35 | 42 | 40 |
| 4. Views on the car industry | | | | | | | | | | | |
| % very satisfied with dealer where bought car | 53 | 47 | 53 | 47 | 62 | 44 | 52 | 61 | 47 | 52 | 54 |
| % very satisfied with service centre or workshop | 63 | 58 | 59 | 47 | 68 | 53 | 61 | 56 | 59 | 64 | 70 |
| A statistical profile | | | | | | | | | | | |
| % of population who are regular drivers | 62 | 73 | 51 | 50 | 39 | 70 | 57 | 58 | 70 | 78 | 64 |
| % of drivers where car drive most often bought from new | 29 | 29 | 29 | 14 | 37 | 26 | 31 | 34 | 29 | 47 | 15 |
| % of regular car drivers in households with more than one car | 47 | 46 | 50 | 61 | 16 | 49 | 46 | 38 | 61 | 62 | 41 |
| % of drivers doing DIY servicing | 13 | 20 | 3 | 15 | 9 | 13 | 12 | 11 | 13 | 4 | 21 |
| % of cars that run on diesel | 9 | 10 | 8 | 3 | 5 | 10 | 9 | 7 | 13 | 10 | 8 |

Base: All drivers (1229)

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

S5.6 Profile of Britain's cars

- The mean age of cars on the road has risen from 5.2 years in 1988 to 5.7 years in 1995, although it has fallen in the last year.
- The proportion of cars on the road that were bought new has fallen from 33% in 1988 to 29% in 1995.
- The proportion of cars on the road that are company cars is the same now as in 1988 at 13%.

Figure S5.10 Profile of Britain's cars

%

Figures repercentaged to exclude 'don't know' responses

This table gives overall information about all cars in the household (up to maximum of 3 per household) and details of the respondent's main car

| | All Cars | Bought new | Bought used | Private | All company cars | Company cars Provided by an employer | Business expense |
|------------------------------|----------|------------|-------------|---------|------------------|---|------------------|
| Base: | (1978) | (359) | (867) | (918) | (311) | (245) | (66) |
| | % | % | % | % | % | % | % |
| Car driven most often | | | | | | | |
| Bought new | 29 | 100 | 0 | 24 | 66 | 86 | 35 |
| Bought used | 71 | 0 | 100 | 76 | 34 | 14 | 65 |
| Engine size | | | | | | | |
| Up to 1400cc | 43 | 35 | 42 | 44 | 10 | 8 | 14 |
| 1401-2000cc | 46 | 54 | 49 | 48 | 63 | 73 | 46 |
| Over 2000cc | 11 | 11 | 9 | 8 | 27 | 19 | 40 |
| Type of ownership | | | | | | | |
| Bought privately | 87 | 71 | 94 | 100 | 0 | 0 | 0 |
| Provided by an employer | 8 | 23 | 1 | 0 | 62 | 100 | 0 |
| Business expense | 5 | 6 | 5 | 0 | 38 | 0 | 100 |
| Age of car | | | | | | | |
| 0-3 years | 29 | 70 | 12 | 22 | 68 | 88 | 38 |
| 3-6 years | 27 | 16 | 31 | 28 | 19 | 8 | 37 |
| Over 6 years | 44 | 14 | 57 | 49 | 12 | 4 | 26 |
| Mean age (years) | | | | | | | |
| 1995 | 5.7 | 2.8 | 6.8 | 6.0 | 2.8 | 1.8 | 4.3 |
| 1994 | 5.9 | 3.1 | 7.0 | 6.3 | 2.6 | 2.0 | 4.4 |
| 1993 | 5.5 | 2.8 | 6.6 | 5.8 | 2.5 | 2.0 | 4.0 |
| 1992 | 5.4 | 2.8 | 6.6 | 5.8 | 2.7 | 2.0 | 3.9 |
| 1991 | 5.4 | 2.9 | 6.5 | 5.8 | 2.6 | 2.1 | 3.6 |
| 1990 | 5.2 | 2.7 | 6.6 | 5.7 | 2.4 | 1.7 | 3.8 |
| 1989 | 5.0 | 2.4 | 6.2 | 5.4 | 2.0 | 1.6 | 2.9 |
| 1988 | 5.2 | 2.6 | 6.5 | 5.6 | 2.3 | 1.7 | 3.5 |
| Eight year trends | | | | | | | |
| 1995 | 100 | 29 | 71 | 87 | 13 | 8 | 5 |
| 1994 | 100 | 29 | 71 | 89 | 11 | 8 | 3 |
| 1993 | 100 | 30 | 70 | 89 | 11 | 8 | 3 |
| 1992 | 100 | 30 | 70 | 88 | 12 | 8 | 4 |
| 1991 | 100 | 30 | 70 | 86 | 14 | 9 | 5 |
| 1990 | 100 | 34 | 66 | 86 | 14 | 9 | 5 |
| 1989 | 100 | 33 | 67 | 86 | 14 | 10 | 4 |
| 1988 | 100 | 33 | 67 | 87 | 13 | 9 | 4 |

Source: 1996 Lex Report on Motoring, "Listening to all road users"/MORI

Appendices



A1 Statistical reliability

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

| | Sample size | Research findings | | | | |
|---------------|-------------|-------------------|------------|------------|------------|-----|
| | | 10% or 90% | 20% or 80% | 30% or 70% | 40% or 60% | 50% |
| Total drivers | 1,229 | ±2 | ±2 | ±3 | ±3 | ±3 |
| | 1,000 | ±2 | ±3 | ±3 | ±3 | ±3 |
| | 500 | ±3 | ±4 | ±4 | ±4 | ±4 |
| | 200 | ±4 | ±6 | ±6 | ±7 | ±7 |
| | 50 | ±8 | ±11 | ±13 | ±14 | ±14 |

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

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.

A2 Magnitude of figures being compared

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

| | Size of sample being compared | 10% or 90% | 20% or 80% | 30% or 70% | 40% or 60% | 50% |
|------------------------------------|-------------------------------|------------|------------|------------|------------|-----|
| 1995 compared with 1994 base | 1229-1519 | ±2 | ±3 | ±3 | ±4 | ±4 |
| New versus used car drivers | 359-867 | ±4 | ±5 | ±6 | ±6 | ±6 |
| Company versus private car drivers | 311-918 | ±4 | ±5 | ±6 | ±6 | ±6 |
| Other sub-groups | 1229-1000 | ±3 | ±3 | ±4 | ±4 | ±4 |
| | 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.

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(numbers refer to page in Report)

| | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 |
|-------------------------------------|------|------|------|------|------|------|------|------|
| BUYING A CAR | | | | | | | | |
| Best time to view a car | 59 | | | | | | | |
| Buying by virtual reality | | | | | | | 102 | |
| Cost of car | | | | | 73 | 72 | 98 | 98 |
| Changes in car ownership | | | | 44 | | | | |
| Commitment to manufacturer | | | | | 89 | | 62 | |
| Considerations in buying next car | | | 106 | | | | | |
| Extra car expectations | | | | 42 | | | 37 | |
| Features in current/next car | | | | | 90 | 104 | 133 | |
| How car is chosen | 46 | | | | 86 | | | |
| Improvements by manufacturers | | | | | | | | 66 |
| Influences on choosing model | | 90 | | | | | | |
| Nearly-new cars | | | | | | | | 68 |
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| Numbers buying a car | 42 | 81 | | 81 | 69 | 63 | 92 | 110 |
| Part exchange | | | | 101 | 74 | | | |
| Profile of new and used car buyers | | | | | 65 | | | 111 |
| Reasons for buying car now | 44 | 82 | | | 72 | | | |
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| | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 |
|---|------|------|------|------|------|------|------|------|
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| 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 |

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