



1997

Lex Report on Motoring

Driving for Safety





Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange. Annual sales exceed £1.5 billion, placing it in the top 150 UK quoted companies, ranked by sales. It employs 10,000 people.

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.

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Enquiries: David Leibling, Lex Service PLC, (0171) 705 1212.
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Driving for Safety

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	Page
Foreword by the Secretary of State for Transport	5
Basis of the research	6
Introduction by the Chairman of Lex Service	7
Summary of the research findings	8
 Driving for safety	
1. Driving standards	
1.1. Views on driving standards	12
1.2. Driving behaviour	14
1.3. Speeding	16
1.4. Road-rage	18
2. Drink, drugs and in-car behaviour	
2.1. Attitudes to drinking, drugs and driving	20
2.2. Levels of drinking, drug taking and driving	22
2.3. In-car behaviour	24
3. The best and worst drivers	
3.1. Accident rates	26
3.2. The cause of accidents	28
3.3. A profile of good and bad drivers	30
4. Education and information	
4.1. The effectiveness of government campaigns	32
4.2. The new written driving test	34
5. Policies for safer roads	
5.1. Views on transport policies	36
5.2. Policy options to reduce speeding	38
5.2. The effectiveness of speed cameras	40
6. The safety of the cars we drive	
6.1. The safety record of cars	42
6.2. Safety features and consumer expectations	44
6.3. Car maintenance and MOT's	46
 An overview of car ownership and retailing	
7. Car ownership and car sales	
7.1. Car ownership in the UK	50
7.2. Car ownership in the US and Europe	51
7.3. New car sales in the UK	52
7.4. New car sales in Europe	53
7.5. Expectations of future levels of ownership	54
7.6. Current and expected length of car ownership	56
7.7. Age of the car parc	57
7.8. Scrappage of cars in the UK	58
7.9. Registration of new cars by manufacturer	59

	Page
8. Car buying and servicing	
8.1. Source of finance in car buying	62
8.2. Source of purchase	64
8.3. Reasons for choosing dealership	66
8.4. The purchase cost of new and used cars	67
8.5. Consumer satisfaction with car buying	68
8.6. The engine size of cars	69
8.7. Diesel powered engines	70
8.8. Service locations	71
8.9. Frequency of service and repair	72
8.10. Satisfaction with service	74
Driver profiles and results summaries	
9. Driver and car profiles	
9.1. Profile of car drivers	78
9.2. Profile of new car buyers	79
9.3. Profile of used car buyers	80
9.4. Profile of company car drivers	81
9.5. A profile of Britain's cars	82
9.6. Profile of truck drivers	84
9.7. Mileage of different demographic groups	85
9.8. Profile of commuting patterns	86
10. Results summaries	
10.1. Driver profile by region	90
10.2. A regional summary of road safety results	91
10.3. Summary of results by demographic group	92
Appendix 1 Statistical reliability	94
Appendix 2 Magnitude of figures being compared	95
Appendix 3 Lex Report on Motoring index	96
Appendix 4 Sources and acknowledgements	100



FOREWORD BY THE SECRETARY OF STATE FOR TRANSPORT

I am pleased to welcome this ninth Lex Report on Motoring, particularly as it concentrates on the extremely important issue of Road Safety.

The motor vehicle offers freedom and convenience, but we must also recognise our responsibility to ensure that we use it safely. The Government has been committed for many years to reducing road accidents through engineering, enforcement and education measures, but more needs to be done to ensure that road users do not risk their own and other people's lives.

This report highlights the ambivalent attitude many motorists have to some road safety issues, particularly speeding. Whilst they are recognised as major causes of road accidents, many people still indulge in these irresponsible practices. We must, therefore, continue our work to improve road safety. Such measures as speed cameras, traffic calming and publicity campaigns have gone a long way to reduce the numbers of people killed or seriously injured on our roads. However, it is ultimately the responsibility of each road user to ensure they act in a safe and considerate manner. The finding that women are safer, and therefore better, drivers than men is confirmed by our own casualty statistics. Perhaps, we need to persuade men to adopt driving styles more like those of women!

We welcome the help and support of the private sector in our work to make Britain's roads safer and congratulate the Lex Group for producing a report which provides such valuable insights into the attitudes of motorists

SIR GEORGE YOUNG Bt

The 1997 Lex Report on Motoring presents the analysis of two surveys conducted by Market and Opinion Research International (MORI) on behalf of Lex Service PLC.

For the main car drivers survey, MORI interviewed a sample of 1,209 car drivers (defined as driving at least once a month) in 102 constituency sampling points in Great Britain. This sample included a boosted quota of company car drivers (300). These quotas were set according to the managerial/professional incidence of each of the 102 constituencies where interviewing took place. The data have been weighted to reflect the actual GB incidence of company and private car drivers.

Approximate quotas were also set by sex, age, class and working status. The data were also weighted to correct any slight differences between the quotas set and those that were achieved.

The report also includes the (unweighted) results of a separate survey of 163 truck drivers, conducted across Great Britain at the same time and in the same 102 constituency sampling points as the main car drivers survey.

All interviews were conducted face-to-face between 10th October and 18th November 1996. This year's surveys were, for the first time, conducted using CAPI (Computer Assisted Personal Interviewing) technology - i.e. instead of reading from and recording answers on a paper questionnaire, MORI's interviewers used hand-held computer terminals. As in previous years, however, respondents were prompted with show-cards where appropriate, so this year's figures are completely comparable with results from earlier reports.

Terms

Where sub-group bases are given in the tables and charts 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 company or bought as a business expense. Those whose car is provided by their company are referred to in the text as "company provided car drivers".

In places, the results from the survey have been grossed up to millions of drivers or millions of vehicles, by multiplying the results from the survey by the appropriate number. There are 26 million drivers in Great Britain and 25 million vehicles.

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 where appropriate been repercentaged excluding "don't knows" in order to give directly comparable results.

Introduction

The 1997 Lex Report on Motoring



In this, the ninth Lex Report on Motoring, we have used our annual survey to examine the different facets of road safety; driving standards, driving under the influence of alcohol and drugs, road management, education and the safety of cars themselves. The UK has an enviable record on road safety, with fatal accidents on our roads having fallen by over half in the last thirty years. There is, however, no room for complacency and every step that individuals, government and the car industry can take to save one more life is worth doing.

This year we have talked to truck drivers as well as private motorists. Professional drivers provide a unique perspective on the problems of driving safely on the roads today and it is critical that their views are taken into account when planning government policy in particular.

What is clear from the research is that there is an element of complacency emerging with respect to road safety issues. Drivers continue to welcome stiffer punishment for serious driving offences, but significant numbers regularly flaunt many safety related traffic laws, from speeding to driving under the influence of drugs and alcohol. It needs to be continually reinforced that safety is an issue for all road users and whilst the car industry can continue to make technological improvements and our road system can be managed more safely, the biggest problem will remain driver error.

We have also continued our regular look at the car industry and how it is performing. Sales have continued to rise through 1996 and the private buyer is returning to the marketplace, as dealers and manufacturers have striven through price and service to make new cars more attractive. Satisfaction with after-sales care continues to rise, which is encouraging to see, but again there is no room for complacency. The research has shown that customer loyalty is harder to achieve and with the high standards of manufacture right across the car industry, service is increasingly important in distinguishing one marque from another.

We at Lex want to ensure that we provide the best service we can to our customers, whether they are buying a car, a truck or a lift truck. We find the results from the Lex Report on Motoring help us significantly in this quest for improved standards. We also hope that by making the report widely available and through examining issues such as road safety, we can help all of those involved in the road transport industry to improve the products and services we offer to the travelling public.

I hope you find the report helpful and useful.

A handwritten signature in black ink, appearing to read 'Trevor Chinn', with a stylized flourish at the end.

Sir Trevor Chinn
Chairman, Lex Service PLC

Summary of the research findings

1. Driving standards

Britain's motorists are confident of their own ability as drivers, although on balance they believe general driving standards in the country are poor. This reflects the widespread disregard for speed limits, especially on motorways.

Women in particular have growing confidence in their own ability, which the Lex Report research findings support. Men are worse drivers than women in almost every respect, from speeding to drink driving to accident rates. Those under 35 years old and company provided car drivers are also more likely to admit to poor driving habits, although the annual mileage of company provided car drivers is twice as high as private motorists.

Road-rage, a phenomenon measured for the first time in last year's report, continues to be a problem on the road. Many drivers admit to feelings of road-rage, although very few admit to committing anything worse than verbal abuse or gesturing, which is widespread across both sexes.

Truck drivers are exemplary road-users, despite their very high annual mileage, but do admit to feelings of road-rage, with a small minority going on to commit serious road-rage offences.

2. Drink, drugs and in-car behaviour

Drink-driving is still an issue of deep concern to the motoring public and there is strong support for more stringent laws on drink-driving and drug-driving. Over half of people would welcome halving the current drink-drive limit. Despite this there is some evidence that attitudes towards tougher punishments are softening, based on the results of this year's survey compared with previous surveys.

Drink-driving is relatively uncommon and very few people personally admit to doing it, although when the figures were grossed up, around two million people admit to being in a car in the last 12 months, either as the driver or as a passenger, when the driver was over the limit.

With the use of "softer" illegal drugs becoming more commonplace, motorists were asked both about their attitudes to drug-driving and any experience they may have had. Surprisingly, more motorists think it is dangerous to drive under the influence of too much alcohol than do driving under the influence of amphetamines or marijuana. When the figures were grossed up, around half a million motorists admitted to being in a car in the last 12 months where the driver was

The worst thing about driving in Britain today..... **"People's manners. There is so little respect and consideration for other road users"** *Female, 37 year old.*

How drink-driving and drug-driving should be dealt with....
"Prescribed drugs should carry a warning and doctors and pharmacists should also warn users. Advertising should warn illegal drug-users and drinkers how dangerous it is to drive under the influence of all these drugs." *Female, 34 years old.*

under the influence of an illegal drug, such as marijuana or speed. Most of these people were male and under 35 years old.

A quarter of drivers admit to falling asleep at the wheel, but there is a hard core of men who regularly drop-off. 2% of drivers account for a third of sleep-drive incidents.

3. The best and worst drivers

The rate at which people have accidents depends on the miles they drive, but also on their attitude to driving and behaviour on the road. Those groups within which more admitted to poor driving behaviour, also had the worse accident rates; truck-drivers, men, younger people and company provided car drivers.

Accidents are generally put down to driver error, with driving too fast the most common cause and poor driving conditions the second most common cause. Despite most accidents being put down to driver error, very few car drivers or truck drivers take personal responsibility for the accidents they have had.

The Lex Report research identified five groups of drivers, based on their feelings of road-rage, their attitude to speed limits and their view of their own driving standards; "The Humble Saints", "The Self-Righteous", "The Angry Moralists", "The Cool and Cavalier" and "The Mad and Bad".

The worst group for accidents were "The Mad and Bad", 15% of whom have had an accident in the last year. This group have no respect for speed limits and are susceptible to feelings of road-rage.

The best group for accidents were "The Humble Saints", over half of whom had never had an accident. This group are law abiding and calm drivers, who have a poor opinion of their own driving skills.

4. Education and information

Most motorists believe the road-safety campaigns run by the government are a great success. Awareness of the campaigns is high and there is a general belief that they are effective. Of the recent campaigns, the most effective is believed to be the "Drinking and driving wrecks lives" advertisements, whilst many of those who remembered the "Clunk-click" campaign from the 1970's believed it was effective. Motorists believe that future campaigns should be focused on drink-driving and trying to get people to drive more slowly in towns.

The worst thing about driving in Britain today..... **"The worst thing is arrogant drivers and there are too many youngsters with too powerful cars"** *Male, 35 years old.*

Summary of the research findings

The new written driving test was introduced after most of the respondents in the Lex Report survey had qualified. There is, however, widespread support for the new written driving test and a growing belief that the driving test does ensure that new drivers are safe road-users.

Respondents were asked three of the questions from the written test and three-quarters of them failed to get more than one right. This would suggest that the third of drivers who believe they would fail their test if they took it again "tomorrow" is an underestimate.

5. Policies for road safety

The main concerns of both drivers and non-drivers with respect to transport are congestion and pollution. The safety of road users is seen by many as a relatively low priority.

Against this background of driver priorities, many believe the most effective road safety policies are those that single out individual drivers, such as speed cameras. Those people who regularly speed agree with this analysis and believe speed cameras and on the spot fines would be the most effective deterrent for them.

Speed cameras are having a permanent effect on the behaviour of a rising number of drivers, although three in ten say they still slow down just for the cameras. When the figures are grossed up, around 2.4 million drivers say they have been flashed at by cameras they passed when driving on average 12 mph over the limit. 84% of these drivers were male.

There is strong support for compulsory retesting of people who have been banned from driving and for motorists who have reached 70 years of age.

6. The safety of the cars we drive

Whilst car travel is still not as safe as air travel, it has become much safer over the past fifty years, with deaths on the road falling by 30% between 1990 and 1995 alone. Road safety is the area where most motorists believe that manufacturers have made the greatest progress.

Perhaps because of this, safety is not the main priority for many motorists when they are choosing their cars. Their top priorities are price, size and economy. Acceleration and security features have risen in importance since 1992, whilst environmental performance has slipped down the list of priorities, despite it being an area where fewer motorists believe manufacturers have improved significantly.

If I was Transport Secretary for the day..... **"12 months after the initial driving test I would make people do another test, because the driving standards of some young people is just not good enough."** *Male, 46 years old.*

If I was Transport Secretary for the day..... **"I would have video cameras at all traffic lights to catch those who cross on red traffic lights and fixed penalties for those who refuse to indicate when turning corners."** *Male, 42 years old.*

If I was in charge of a car manufacturer for the day..... **"I think the manufacturers should think about child safety. I do not think seat belts for children are secure and seats should be adjustable for children. I also think there should be airbags and side impact bars on all cars."** Female, 49 years old.

Newer cars and particularly company cars are more likely to be in accidents, according to the Lex Report research. This reflects the higher mileage of company car drivers in particular, but also their driving behaviour and driving attitude.

There is a growing belief that the MOT is an effective way of ensuring cars on the road are safe.

7. An overview of car ownership and retailing

1996 has seen a continued rise in new car sales, passing the two million mark and rising to a seven year high. There has been growth in both the private and company car markets.

Car ownership is still increasing and grossing up motorists' estimates of their future levels of car ownership, it is predicted that there will be another 900,000 cars on the road in two years time.

Loyalty in the car market, both for manufacturers and for dealers, appears to be low. Smaller manufacturers are continuing to grow their market share at the expense of those marques with historically high market share. There is also a suggestion that a rising proportion of new cars are being bought through dealers selling more than one brand.

There is evidence that motorists are trading up, both in the new car market and the used car market. People are paying more for their new and used cars, despite indices showing that on a like for like basis used car prices have actually fallen in real terms and new car prices risen slightly.

As diesel sales have dropped in 1996, a falling proportion of people say they will consider diesel engines when it comes to their next purchase.

Satisfaction with servicing continues to rise, with less people servicing cars themselves and increasing numbers going through workshops and dealers. Many motorists would like more dialogue with the mechanics and other personnel where they get their car serviced.

1. Driving standards

- Many drivers believe the standards of driving on Britain's roads is poor, although they think their personal standard of driving is high.
- Women have growing confidence in their ability as drivers, a finding supported by their reported driving standards and lower accident rates.
- The drivers most likely to admit to dangerous driving habits and speeding are men, the under 35's and company car drivers. Many of these cover more miles per annum than the average.
- There is widespread acceptance that it is acceptable to break speed limits, particularly on motorways.
- Most drivers admit to feelings of road-rage and to having been victim to it. The majority of drivers, both male and female, admit to gesturing at and verbally abusing other drivers, but no worse.
- Truck drivers are generally exemplary road-users. They are, however, the group most likely to commit road-rage offences, possibly caused by the stress of driving and the mileage they cover.

In this section various aspects of driving standards are examined. The section starts with an examination of views on driving standards and then goes on to look at dangerous driving behaviour and speeding. It ends with a review of road-rage and a quantification of road-rage offences.

1.1. Views on driving standards

There is conflicting evidence regarding driving standards and road-safety in Britain. Last year's Lex Report research showed that nearly two million people were forced to pull-over or off the road as a result of road-rage. However, at the same time as road-rage has become a phenomena, road-deaths have been falling - by 30% in the last five years alone.

On balance, motorists think driving standards in Britain today are poor (see figure 1.1). Truck drivers are polarised in their views, with 38% saying standards are poor and 28% saying they are good.

Although there are mixed feelings on general driving standards, most people think they personally are good or very good drivers (74%). Only 1% think they are poor drivers. Truck drivers in particular rate their own skills highly, with 21% saying they are "very good" and 58% "good", compared



The worst thing about driving in Britain today.... **"People are too eager to get where they are going."** Female, 27 years old.....

"The standard of HGV driving has fallen dramatically with a lack of regard for other road users." Male, 53 years old.

Figure 1.1 **Standards of driving in Britain today**

	All drivers	Men	Women	17-34 year olds	35-54 year olds	55+ year olds	Truck drivers
<i>Rating of general standards</i>	%	%	%	%	%	%	%
Good/Very good	30	35	25	27	32	34	28
Neither good nor bad	36	32	41	33	38	36	34
Bad/Very bad	33	33	34	40	30	29	38
<i>Rating of personal standards</i>							
Very good	14	15	13	12	16	15	21
Good	60	55	66	58	59	63	58
Neither good nor bad/Bad	25	29	20	30	23	20	19

Base: All car drivers (1209), Truck drivers (163)

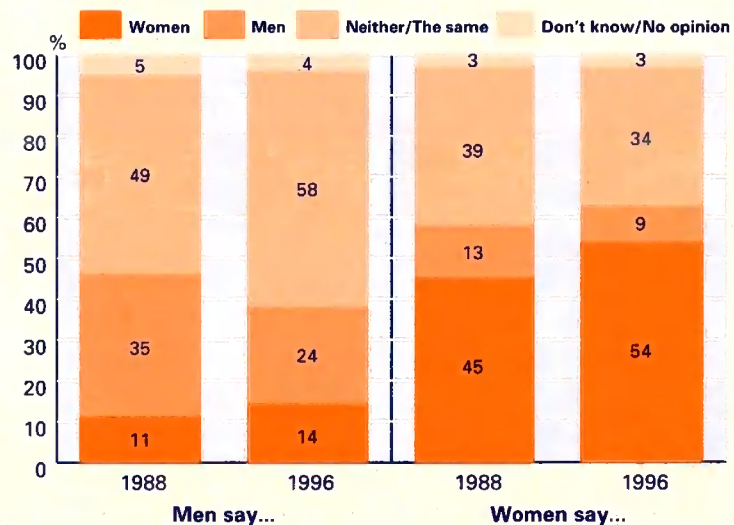
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

to 14% and 60% of car drivers respectively. The research only found two truck drivers who thought they were bad and one who said he was very bad.

In the first Lex Report survey in 1988, drivers were asked "Who make the best drivers, men or women?". Nearly half of drivers (45%) thought they were about the same, with 35% of men thinking that men were better and 45% of women thinking that women were. In the intervening eight years men have become more egalitarian in their views - only 24% now think men are the best drivers, whereas women have become more convinced of their own abilities - 54% now think that women make the best drivers (see figure 1.2).

Figure 1.2 **Women make the best drivers?**

Who make the best drivers?



Base: All car drivers

Source: Lex Report on Motoring/MORI

An increasing proportion of women believe they are better drivers than men.

1. Driving standards

1.2. Driving behaviour

Despite falling road fatalities many people admit to unsafe driving habits. Over seven out of ten drivers in this year's Lex Report survey admit to at least one case of poor driving behaviour in the last 12 months (see figure 1.3).

Nearly one in three have driven when very tired in the past 12 months. One in five admitted to tailgating cars in front and just over one in five admit to changing lanes/directions without signalling. 3% or three-quarters of a million drivers, have driven when their car was knowingly unsafe.

When these figures are probed a number of themes emerge:

- Men admit to more of these dangerous driving activities than women, supporting the view that women are more responsible drivers than men. For example, a quarter of men admit to driving too close to the car in front, around twice the proportion of women.
- Younger drivers appear to be significantly less responsible than older drivers. Over 60% of the drivers who knowingly drove unsafe cars were under 35 years old. 37% of under 35's had driven when very tired, compared to 16% of over 55's.
- Drivers of company-provided cars, who are often the higher mileage drivers, admit to some potentially hazardous behaviour. Nearly half of this group had driven when they were very tired and nearly four in ten admitted to following closely the car in front.

Looking at another aspect of dangerous driving, rubber-necking, or slowing down to look at the site of an accident, the Lex Report research found 43% admitting to it, with a further 2% admitting to actually changing lanes to have a good look - 21 out of the 24 respondents who admitted to this were men and 17 were under 35 years old.

The worst thing about driving in Britain today..... **"There is too much fast driving and a lot of cars don't use their indicators. Also I think a lot of people are ignorant of their highway code."** Female, 25 years old.

"There are too many silly old fools who insist on driving at low speeds when there is heavy business traffic."

Female, 57 years old.

"People sitting in the fast lanes and not pulling across. People who drive too slowly irritate me." Male, 37 years old.



1. Driving standards

Figure 1.3 **The level of dangerous driving behaviour**

In the past 12 months.....	All	Men	Women	17-34 year olds	Company provided car drivers	All
	%	%	%	%	%	Millions
Driven when very tired	31	37	24	37	47	8.1
Parked your car illegally	27	30	23	34	40	7.1
Driven without wearing a seatbelt	24	30	16	29	23	6.3
Not signalled changing lane/direction	22	23	20	23	37	5.8
Followed the vehicle in front too closely (tailgating)	20	25	13	26	40	5.2
Driven a vehicle without an MOT	5	6	4	7	1	1.3
Driven too slowly for road conditions	4	3	5	4	4	1.0
Driven a car that was unsafe	3	4	2	6	1	0.8
Driven while not insured	3	4	2	6	0	0.8
None of these	28	22	37	20	9	7.3

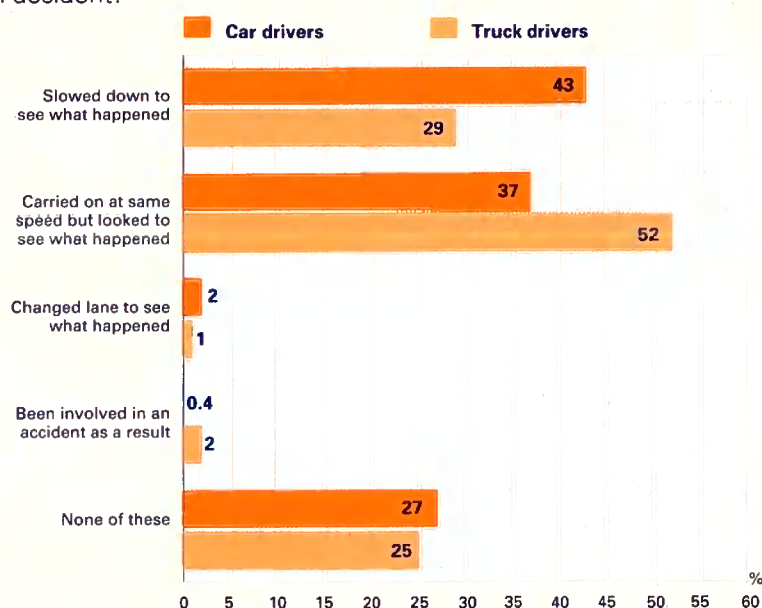
Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Truck drivers claim to be the most responsible in this respect with only three in ten admitting to slowing down to have a look, although 2% of truck drivers had been involved in accidents as a result.

Figure 1.4 **Rubbernecking at accident sites**

Which of these have you ever done when driving past the scene of an accident?



Base: All car drivers (1209), All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

1. Driving standards

1.3. Speeding

There appears to be a widespread disregard for speed limits amongst Britain's drivers, particularly on motorways (see figure 1.5). Over half of the drivers in the Lex Report survey admit to breaking the speed limit on a motorway in the past 12 months. This is supported by government data which show that 55% of cars on Britain's motorways are travelling over 70 mph. 44% of drivers in the Lex Report survey also admitted to breaking the speed limit in a non-residential area in the previous 12 months and four in ten had gone over the limit in a residential area.

As with other aspects of poor driving standards, men admit to being worse than women. Other high offenders are younger people and drivers of company provided cars. For example, 6% or half a million under 35's admitted to racing another driver on a public road.

Figure 1.5 **The incidence of speeding and traffic dodging**

	All	Men	Women	17-34 year olds	Company car drivers	20,000 miles + per year
	%	%	%	%	%	%
Exceeded the limit on a motorway	52	64	34	55	81	80
Exceeded the limit in a non-residential area	44	52	33	49	69	63
Exceeded the limit in a residential area	39	43	35	42	57	47
Overtaken on the inside lane of a motorway	13	18	7	15	28	25
Driven in a bus lane in rush-hour	5	7	3	7	5	7
Driven through a red light intentionally	4	4	2	5	2	10
Raced another driver on a public road	3	5	2	6	2	8
Driven on the hard shoulder of a motorway	1	1	0	1	0	0

Base: All car drivers (1209),

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

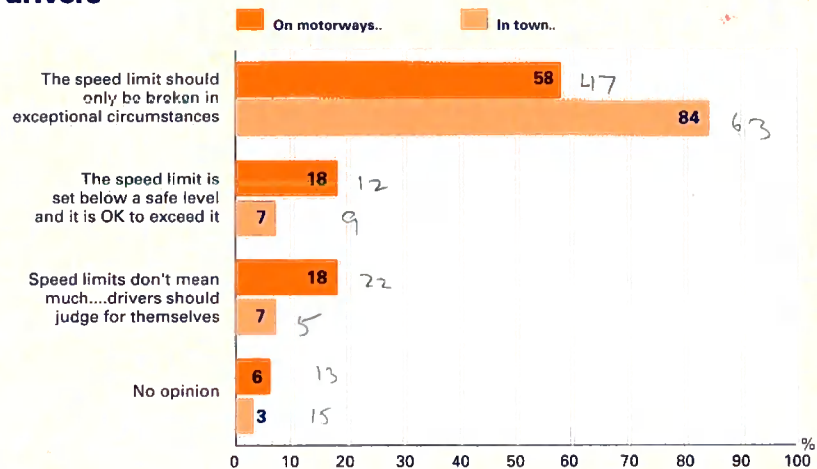


Nearly six in ten drivers of company provided cars admitted to speeding in residential areas.

This widespread disregard for speed limits amongst men, younger drivers and company provided car drivers was matched by their attitudes to the current speed limits on motorways and out-of-town roads (see figure 1.6). Seven in ten women and

1. Driving standards

Figure 1.6 **Attitudes to the speed limit amongst car drivers**



Base: All car drivers (1209)

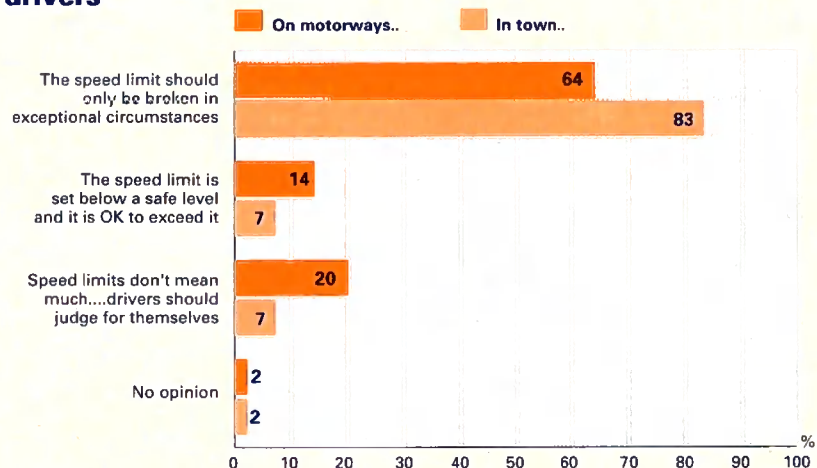
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Most people have respect for in-town speed limits but many view speed limits on motorways as optional.

seven in ten drivers over 55 years old felt the speed limit on motorways should not be broken except in exceptional circumstances, compared to half of men and young people and less than four in ten company provided car drivers. The others, many of whom are likely to be regular motorway users, felt it was alright to exceed the limit or to judge for yourself. Very few people (14%) felt it was right to disregard speed limits in town.

Truck drivers emerged as the most responsible group, with two-thirds saying that even on motorways the speed limit should only be broken in exceptional circumstances (see figure 1.7).

Figure 1.7 **Attitudes to the speed limit amongst truck drivers**



Base: All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Truck drivers have the most responsible attitudes to speed limits.

1. Driving standards

1.4. Road-rage

Road-rage was quantified for the first time in last year's report. Grossing up and averaging the results from the past two years shows it is a continuing problem. Each year there are:

- 1.4 million people forced to pull over or off the road.
- 750,000 people physically threatened by another driver.
- 275,000 people who have their cars deliberately hit by other cars.
- 175,000 people who have their cars deliberately damaged by other drivers.
- 130,000 people attacked by other drivers.

This was in addition to the common place verbal abuse and gesturing and tailgating, which 39% and 33% of drivers respectively had suffered in the past 12 months.

Respondents were asked whether they had ever felt like committing and then whether they had actually committed road-rage (see figure 1.8). Many admitted to verbally abusing or gesturing at another driver (52%), both amongst men and women. Few admitted to committing the most serious expressions of road-rage* (3% or 800,000 drivers). There are, however, widespread feelings of anger whilst driving, particularly amongst men and the under 35's.

Lack of courtesy and potentially dangerous manoeuvres cause road-rage. The main reasons were cutting in sharply after overtaking (36%), people driving too close behind (26%) and failing to signal intentions clearly (25%), behaviour which around one in five drivers admit to (see section 1.2).

Whilst in other areas truck drivers were model citizens, they appear to be more likely to commit road-rage (see figure 1.9). One in five truck drivers had felt like committing one of the most serious road-rage

"I think the main problem on Britain's roads today is road-rage. It's mainly due to frustration caused by the sheer volume of traffic, along with the congestion caused by road-works." *Male, 44 years old.*

"The main problem I find is aggressive driving and tailgating and people trying to cut in. I think I suffer because I am a woman in a potentially fast car and they assume I don't know how to drive it properly." *Female, 43 years old.*



* Excludes gesturing, verbal abuse and driving closely behind another driver.

Figure 1.8 **The incidence of road-rage amongst car drivers**

	Committed road-rage		Felt like doing it			
	All	All	Men	Women	17-34 year olds	Company provided car drivers
	%	%	%	%	%	%
Verbally abused or gestured to another driver	52	66	69	63	75	78
Followed another driver closely or aggressively	9	18	22	11	23	32
Got out and physically threatened another driver	2	10	13	5	13	9
Got out and attacked another driver	less than 1	4	5	2	5	1
Got out and damaged another driver's vehicle	less than 1	3	4	1	4	4
Forced another driver to pull over or off the road	less than 1	5	7	2	4	3
Forced another driver to pull over and stop	1	7	10	2	6	6
Deliberately driven into another driver's car	0	4	4	3	5	4
None of these	45	27	23	33	19	15

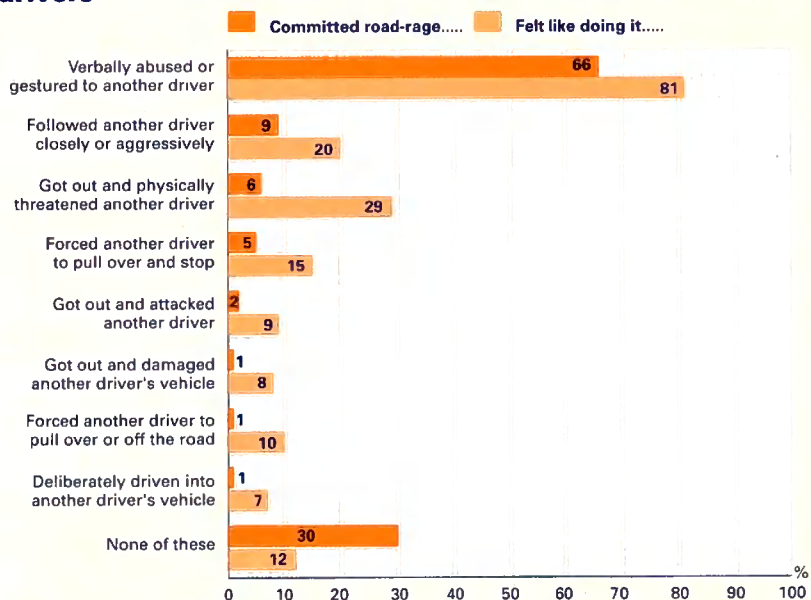
Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

crimes*, such as assaulting another driver or ramming another vehicle.

9% of truck drivers (or around 100,000 people) had actually committed a serious act of road rage*. 6% had got out of their truck and physically threatened another driver and 5% had forced another driver to stop. These figures have to be viewed, however, against the much higher mileage of truck drivers.

Figure 1.9 **The incidence of road-rage amongst truck drivers**



Base: All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Some truck drivers admit to acts of road-rage, whilst many admit to feeling stressed with other drivers.

2. Drink, drugs and in-car behaviour

- Support for more stringent laws on drink-driving and drug-driving is high, but there is evidence that attitudes may be softening.
- Over half of motorists would support reducing the drink-drive limit to half its current level.
- More motorists think it is dangerous driving when over the legal limit of alcohol than when driving under the influence of amphetamines or marijuana.
- Experience of drink-driving and drug-driving is low, although two million people admit to having been in a car where the driver was under the influence of alcohol in the last year.
- Well over half a million motorists admit to being in a car where the driver was under the influence of an illegal recreational drug.
- A quarter of drivers admit to falling asleep at the wheel, but there is a hard core of men aged under 55 years old who regularly drop-off.

This section examines attitudes to drink-driving and drug-driving and then looks at the extent to which they occur. It then goes on to look at what people do in their cars, from using mobile phones, to office work, to shaving whilst driving.

2.1. Attitudes to drinking, drugs and driving

Section 1 indicated that there was widespread breaking of road safety laws. Drink-driving has, however, been an area where people's emotions have run high following intense campaigning and education programmes.

Results from this year's Lex Report survey show feelings are strong (see figure 2.1), but that if anything they are softening. Whilst support for random breath-testing has remained static since 1989 (84% support), only 31% now support imprisonment for drink-drivers, compared with 45% in 1989 (it should be noted that the drink-drive limit was reduced between these two surveys). Just over half of drivers would support reducing the drink-drive limit to half of its current level.



With more widespread use of drugs, respondents were asked in the Lex Report survey how dangerous they thought it was to drive under the influence of different drugs (see figure 2.2). Two-thirds of drivers thought driving after drinking over the legal limit was extremely dangerous. What was surprising was that this was a higher figure than for amphetamines/speed or marijuana (60%).

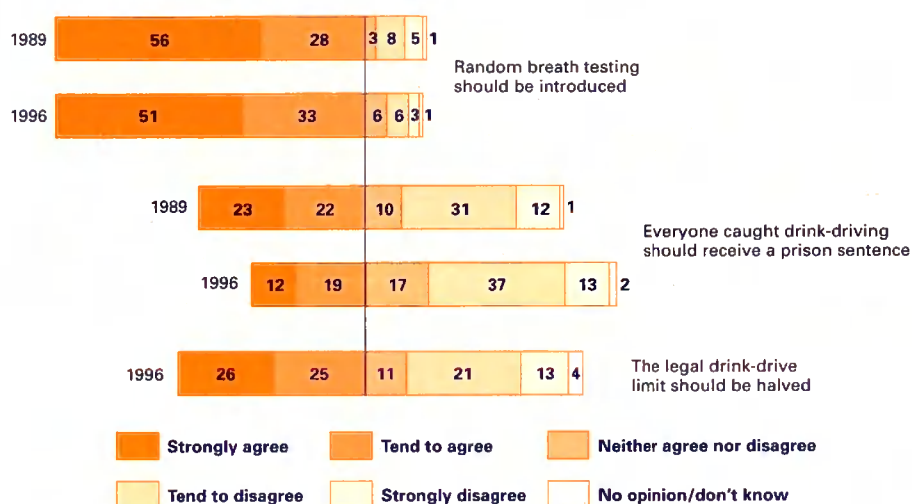
How drink-driving and drug-driving should be dealt with.....

"We should make them feel ashamed. Society must find a way of doing that." Male, 52 years old. **"We should humiliate them in public by making them do tasks such as road cleaning in our city centres."** Female, 53 years old.

2. Drink, drugs and in-car behaviour

Figure 2.1 **The desire for stricter legislation**

Most think punishment for drink driving should be severe, although attitudes may be softening.



Base: All car drivers
Source: Lex Report on Motoring/MORI

Illegal drugs such as ecstasy, cocaine and heroin were seen as the most dangerous, whilst over two-thirds thought legal stimulants, such as the caffeine based Pro-plus, had some danger attached to them if taken before driving. Medicines likely to cause drowsiness were perceived as dangerous by most people, although only a quarter thought it extremely dangerous to drive having taken such medicines. Only the over 55's see them as a serious danger (67% said they were very or extremely dangerous).

78% of motorists think it is dangerous to drive after drinking any alcohol, even when it is less than the legal limit, with one in five believing it is extremely dangerous.

Figure 2.2 **The perceived danger of combining different drugs with driving**
% saying "extremely dangerous"

	All	17-34 year olds	35-54 year olds	55 years and over
	%	%	%	%
Other illegal drugs such as ecstasy, cocaine or heroin	80	81	80	76
Alcohol over the legal limit	65	65	65	64
Amphetamines or speed	60	61	60	57
Cannabis or marijuana	44	41	43	48
Medicines likely to cause drowsiness	23	20	23	26
Alcohol on or below the legal limit	18	15	18	19
Legal stimulant drugs such as Pro-plus or guarana	17	16	16	21

Base: All car drivers (1209)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

2. Drink, drugs and in-car behaviour

2.2. Levels of drinking, drug taking and driving

With such strong feelings on drink-driving and drug-driving, it is unsurprising that the numbers admitting to it are relatively low (see figure 2.3). Seven in ten respondents in this year's Lex Report survey had not been in a car with a driver under the influence of any alcohol or drugs in the past 12 months.

However, in the past 12 months, approximately:

- 2 million people have been in a car where the driver had drunk more than the legal limit.
- Half a million where the driver was under the influence of cannabis.
- A quarter of a million people where the driver was under the influence of speed.
- 100,000 people where the driver was under the influence of ecstasy, cocaine or heroin.

The use of medicines which are likely to cause drowsiness and continuing to drive is small, but significant. 4% of people have been in a car with a driver using such medicines and 2% admitted they personally had. These figures do not include those people who are unaware of problems medicines may cause.

There are clear demographic biases in the drink-drive and drug-drive figures (see figure 2.4). Two-thirds of respondents who had travelled with a driver under the influence of alcohol were male and nearly nine in ten were under 55 (split equally between the under 35's and over 35's). Three-quarters of respondents who had been in a car where the driver was under the influence of illegal drugs were male and nine in ten were under 35 years old.

How drink-drivers and drug-drivers should be dealt with.....

"They need help and re-education to stop them re-offending. They should also be banned from driving until they are given medical clearance that they are fit to drive." *Female, 45 years old.*

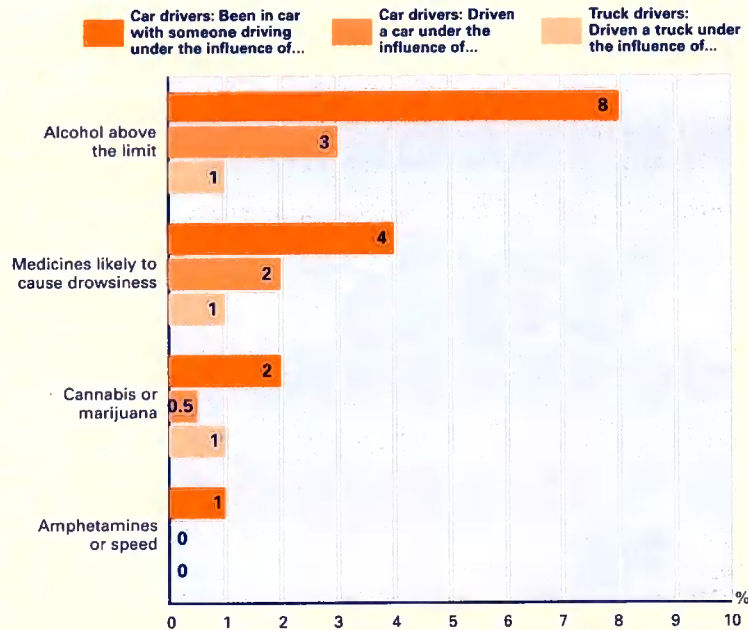
"We really need more of those aggressive advertising campaigns. This should be supported by more police activity, from spot checks to more police in pub car parks at closing time." *Male, 51 years old.*



2. Drink, drugs and in-car behaviour

Experience of drink-driving and drug-driving is significant for car drivers, but uncommon for truck drivers.

Figure 2.3 **Levels of illegal drinking and drug-driving**
In the last 12 months...



Base: All car drivers (1209), All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Truck drivers were also asked whether they had used drugs whilst driving in the previous 12 months (see figure 2.3). Nine out of ten claimed not to have driven under the influence of anything, with 8% saying they had drunk some alcohol but under the limit, whilst just one driver admitted driving when over the limit and one under the influence of marijuana.

Figure 2.4 **Incidence of drink and drug-takers**

% who have been in a car in the last 12 months where the driver was under the influence of...

	Men	Women	17-34 year olds	35-54 year olds	55+ year olds
	%	%	%	%	%
Any alcohol	31	23	33	30	15
Medicines likely to cause drowsiness	3	5	5	5	1
Any illegal drugs	3	2	6	1	0

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

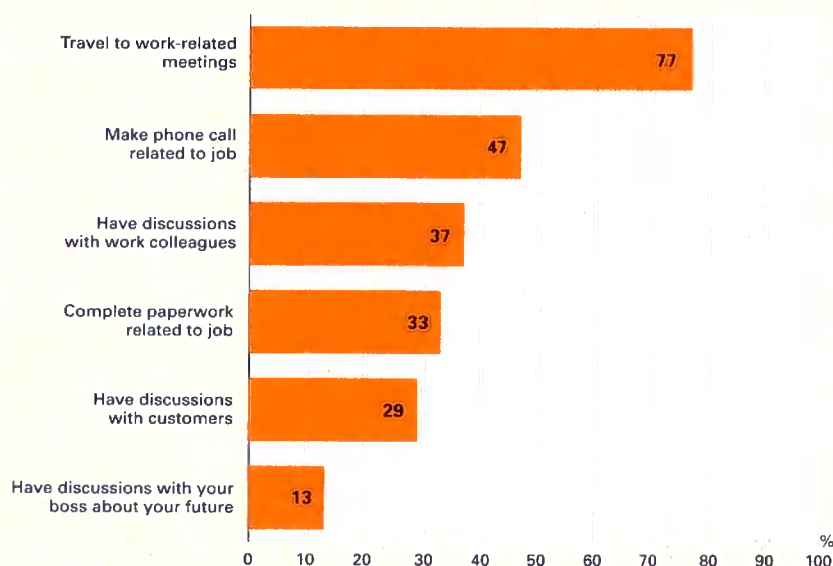
2. Drink, drugs and in-car behaviour

2.3. In-car behaviour

This section examines what people do in their cars in general and what actions are a potential threat to safety.

Company car drivers use the car as an extension to the office (see figure 2.5). Not only is it used to travel to work-related meetings (77%) and to complete paperwork (33%), but nearly half of company car drivers make work-related calls from their car. The car is also a meeting room, with 37% talking to colleagues and one in seven talking to their boss about their future prospects. It is also used as a place to meet customers by three in ten company car drivers.

Figure 2.5 **The use of the car as an office**



Base: All with company car (305)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Many people eat and drink and change radio stations whilst driving and these are unlikely to be a serious safety hazard, but one in five have read a map whilst driving at normal speed over the past 12 months, 12% have had a large pet loose in the car and 13% have

talked on a hand-held mobile phone (see figure 2.6). Over 600,000 people admit to kissing and cuddling and over 600,000 to shaving, putting on their make-up or doing their hair whilst driving.

More serious are those people who fall asleep at the wheel. A quarter of people admit to having fallen asleep at the wheel, but



"Drivers for whom the car is an essential tool of the job and who regularly undertake long motorway journeys need to be encouraged by employers to take regular breaks, to ensure the safety of their employees and other road users." Lex Service.

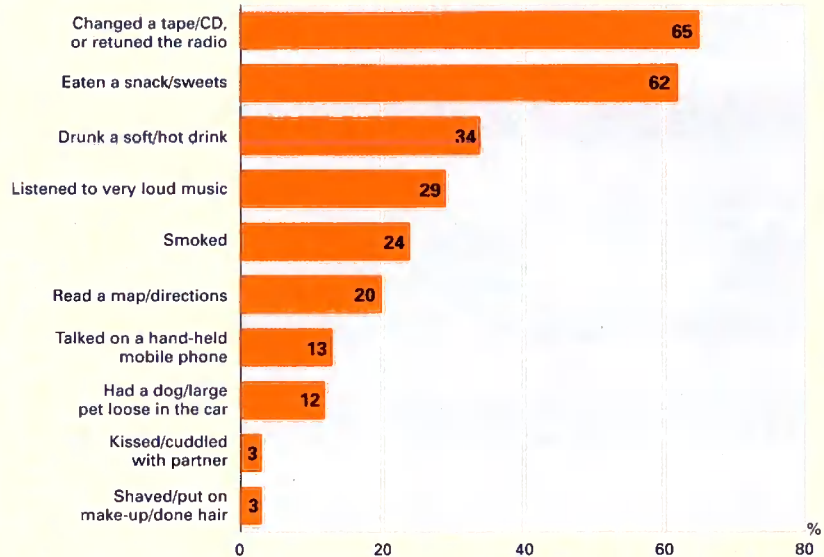


The car is an extension of the office for company car drivers.

2. Drink, drugs and in-car behaviour

Figure 2.6 **The use of the car as a home extension**
In the last 12 months whilst driving at a normal speed for the road...

Many people regard the car as a home from home irrespective of whether they are driving or not.



Base: All car drivers

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

most (74%) have only done it a couple of times. There is a hard core of regular sleep-drivers - 2% of drivers account for over a third of all incidents. These sleep-drivers tend to be male (75%), under 55 and higher mileage drivers (see figure 2.7).

When people find themselves nodding off, the most common response is to open a window (45%) or turn the music up (20%). Under half stop driving, either for a drink (34%) or a sleep (12%).

Figure 2.7 **Profile of sleep drivers**

		% of motorists	% of sleep-drivers	Millions of sleep-drivers
Sex	Male	59	75	5.3
	Female	41	25	1.8
Age	17-34 year olds	38	44	3.1
	35-54 year olds	39	43	3.0
	55 years and over	23	13	0.9
Mileage	Under 10,000 miles a year	52	35	2.5
	10-20,000 miles a year	38	48	3.4
	20,000 miles per year and over	9	17	1.2

Base: Those who admit to nodding off whilst driving in the last 12 months (362)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

3. The best and worst drivers

- Accident rates relate to miles driven, but also to driving behaviour and attitude. Men, the under 35's and company car drivers are the most accident prone, partly as a result of their higher mileage.
- Truck drivers drive many miles per year, but are also prone to feelings of road-rage. They have a higher accident rate than car drivers, but a lower accident rate in terms of accident per mile.
- Both truck drivers and car drivers tend to shift the blame for accidents onto others.
- Driving too fast and poor weather conditions are cited as the most common cause of accidents. Most accidents are put down to driver error.
- The Lex Report research identified five groups of drivers, based on their feelings of road-rage, their attitude to speed limits and their view of their own driving standards; The Self-Righteous, The Humble Saints, The Angry Moralists, The Cool and Cavalier and The Mad and Bad.
- The group least likely to have had an accident were calm, law abiding motorists, with little confidence in their own ability as drivers (The Humble Saints).

In this section driving standards are measured in terms of accident rates and the cause of accidents are examined. It then identifies and profiles five groups of drivers with different approaches to driving safety.

3.1. Accident rates

The higher mileage and poorer driving behaviour of men, young people and company provided car drivers results in them having more accidents. 13% of young people, 11% of men and 14% of company provided car drivers have had an accident within the last year, compared with the average of 9% for all car drivers. 53% of the women interviewed had never had an accident, compared to 35% of men.



Accident rates are partly a reflection of miles driven - 13% of those who drive over 18,000 miles per annum have had an accident in the last year. This evidence is supported by research from the University of Manchester - after allowing for the effects of mileage and experience, their work showed that men and young people are still more prone to serious accidents.

"Most accidents are caused by driver error or poor driving behaviour, particularly amongst younger men. Everyone, from government to manufacturers, needs to put emphasis on driver education and training, courtesy on the road and reducing the stress of modern driving."

Lex Service.



3. The best and worst drivers

Figure 3.1 **The accident prone**

% had an accident in...	All car drivers	Men	Women	17-34 year olds	18,000+ miles per annum	Truck drivers
The last year	9	11	8	13	14	18
1-2 years ago	5	6	5	8	4	8
2-3 years ago	4	4	4	3	5	7
3 years ago or more	39	44	31	28	44	29
Never	43	35	53	47	31	39

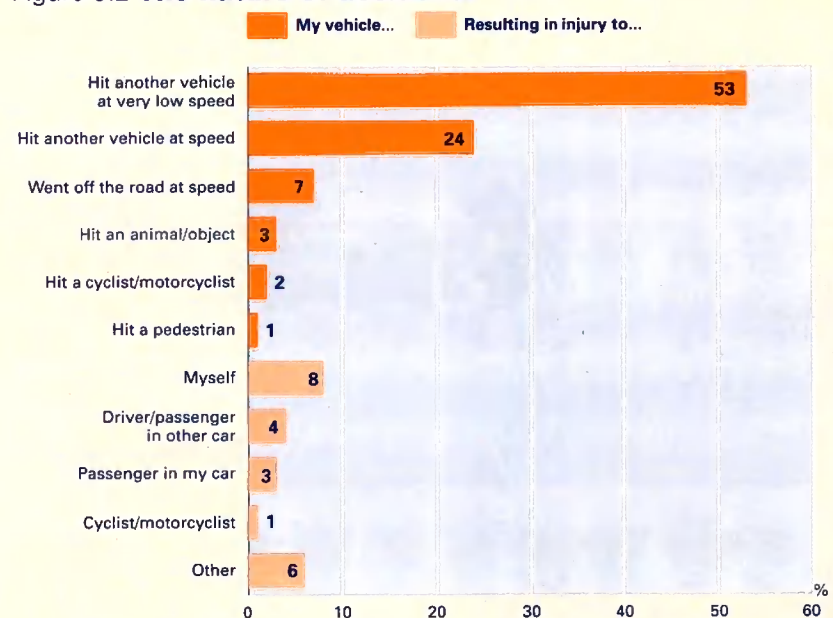
Base: All car drivers (1209), All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

The Lex Report survey shows that truck drivers are the most likely to have had an accident in the last year (18%). This reflects their mileage (250% more than the average car driver), but may also reflect the stress they are under, indicated by their high levels of road-rage. Of the 24 truck drivers interviewed who had committed the more serious road-rage offences, seven had also had an accident in the previous six months.

The most common accident is hitting another vehicle at low speed (53%), followed by hitting another vehicle at speed (24%). 12% of the accidents probed in this survey resulted in injury to either driver, passenger or pedestrian. Most injuries to occupants of cars were the result of high speed collisions or going off the road.

Figure 3.2 **The nature of accidents**



Base: All car drivers who have had accidents (728)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Most accidents are minor and take place at low speed, with no resultant injuries.

3. The best and worst drivers

3.2 The cause of accidents

The Lex Report survey showed that most drivers put the blame for accidents on other people rather than themselves, whether it is a truck driver or a private car driver that is involved (see figure 3.3).

52% of the truck drivers interviewed that had been involved in an accident blamed someone else, with just 29% taking the blame personally. Whilst the car drivers who had had an accident also tended to shift the blame elsewhere (only 30% take the blame for the accident) more men, young people and company provided car drivers said the accident was their fault. This suggests that their poorer driving standards, which have been highlighted throughout the report, do directly result in more accidents.

There are relatively few accidents where those involved feel no one is to blame, representing just 4% of car incidents and 8% of truck incidents.

The exact cause of accidents will clearly vary from incident to incident. The research suggests, however, that there are some common characteristics (see figure 3.4). Driving too fast is the commonest cause of accidents, cited as a reason in 22% of incidents. The second most common cause is bad weather conditions (21%). Most accidents are caused by driver error, rather than the road conditions or a problem with the car.

Accidents that young people in particular are involved in tend to be driver related. Of all the reasons given not signalling (13%), following too closely the vehicle in front (18%) and driving too fast (24%) were all significantly more common for the under 35's and for those who said the accident was their fault.

"To reduce road accidents and fatalities further, manufacturers must continue to improve the safety of cars, government must build more motorways and by-passes, which it has been proven are safer and individuals must take responsibility for being safe and courteous drivers."

Lex Service.



3. The best and worst drivers

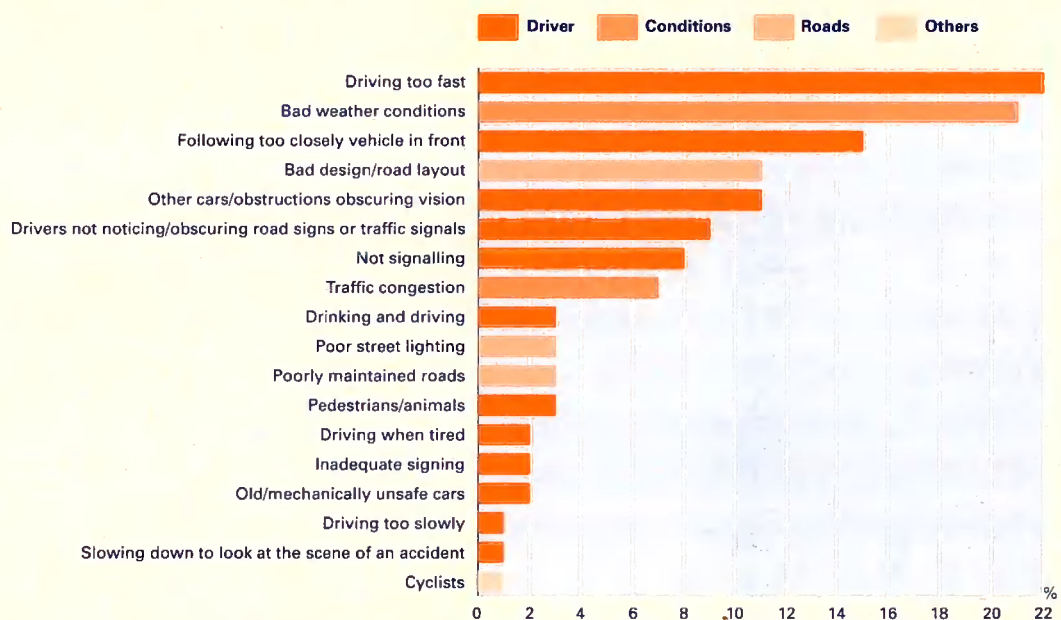
Figure 3.3 Who takes the blame for accidents?

	Car drivers					Truck Drivers
	All	Men	Women	17-34 year olds	Company provided car drivers	All
	%	%	%	%	%	%
Completely my fault	19	19	18	22	28	17
Mostly my fault	11	13	7	11	7	12
Equally my fault and someone else's	9	8	11	9	4	11
Mostly someone else's	8	8	6	9	8	6
Completely someone else's	48	46	53	44	43	46
No ones fault	4	4	3	3	7	8

Base: All car drivers (728), All truck drivers (100) involved in accidents
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Research undertaken by the University of Manchester identified that women and older drivers are more prone to lapses of attention, whilst men, young people and high-mileage drivers were more prone to deliberate deviation from safe driving practices and it is violations such as these that go with crash involvement.

Figure 3.4 The factors contributing to car accidents



Base: All car drivers who ever had a road accident (728)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

3. The best and worst drivers

3.3 A profile of good and bad drivers

From the evidence collated in the Lex Report research, a number of groups have been identified with different driving standards and attitudes.

The first two groups are both immune to feelings of road-rage and are respectful of the road laws. The difference is their view on their own ability as drivers. The Self-Righteous think they are good drivers, whereas The Humble Saints do not. In reality The Humble Saints have had a lot less accidents in the last year (2%), despite driving 25% more miles than The Self-Righteous. Both groups are more likely to be private motorists and have cars with smaller engines. The Self-Righteous are more likely to be women and older middle-age, whereas The Humble Saints are more likely to be male and slightly older.

The Angry Moralists are respectful of the law, even though they are irritated by the driving of others and as a result are more likely than The Self-Righteous to have had an accident. This group are more likely to be male, middle-aged private car drivers.

The Cool and Cavalier do not get annoyed by the behaviour of other drivers, but are cavalier about speed limits. They are also less likely to believe drink-driving is "extremely dangerous" and 5% have driven after consuming more than the legal limit of alcohol in the last year. This group are more likely to be older middle-aged, male and company car drivers. They are more likely to have had a recent accident than The Angry Moralists.

The final group, The Mad and Bad, admit to feelings of road-rage whilst having little respect for speed limits. The result is a much higher accident rate. This group are more likely to be young, male and company car drivers. They are also the highest mileage group and have the highest proportion who admit to driving after consuming more than the legal limit of alcohol in the last year (7%).

Figure 3.5 A profile of the driver groups

	1. The Self-Righteous	2. The Humble Saints	3. The Angry Moralists	4. The Cool and Cavalier	5. The Mad and Bad
	%	%	%	%	%
% believing they are good drivers	100	0	73	76	67
Miles driven per year	8,600	10,800	11,200	12,000	13,200
% with engines under 1400cc	44	50	35	32	31
% believing drink-driving is extremely dangerous	73	74	68	51	58
% driven after having drunk more than the legal limit of alcohol in the last 12 months	0	1	2	5	7

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for Safety"/MORI

3. The best and worst drivers

- | | |
|--------------------------|--|
| 1. The Self-Righteous | Do not feel road-rage (except gesturing/
verbal abuse)
Do not think that the speed limit should be
broken except in exceptional circumstances
Believe they are good drivers |
| % of drivers | 38% |
| % never had accident: | 52% |
| % accident in last year | 9% |
| Likely to be: | Women, Older middle-age, Private motorists |
| 2. The Humble Saints | Do not feel road-rage (except gesturing/
verbal abuse)
Do not think that the speed limit should be
broken except in exceptional circumstances
Believe they are at best indifferent drivers |
| % of drivers | 10% |
| % never had accident: | 51% |
| % accident in last year | 2% |
| Likely to be: | Men, Older motorists, Private motorists |
| 3. The Angry Moralists | Do feel road-rage (worse than gesturing/
verbal abuse)
Do not think that the speed limit should be
broken except in exceptional circumstances |
| % of drivers | 14% |
| % never having accident | 34% |
| % accident in last year | 8% |
| More likely to be: | Male, Middle-aged, Private car drivers |
| 4. The Cool and Cavalier | Do not feel road-rage (except gesturing/
verbal abuse)
Think the speed limit is there to be broken |
| % of drivers | 21% |
| % never having accident | 37% |
| % accident in last year | 11% |
| More likely to be: | Male, Older middle-age, Company car drivers |
| 5. The Mad and Bad | Do feel road-rage (worse than gesturing/
verbal abuse)
Think the speed limit is there to be broken |
| % of drivers | 18% |
| % never having accident | 31% |
| % accident in last year | 15% |
| Likely to be: | Male, Young, Company car drivers |

4. Education and information

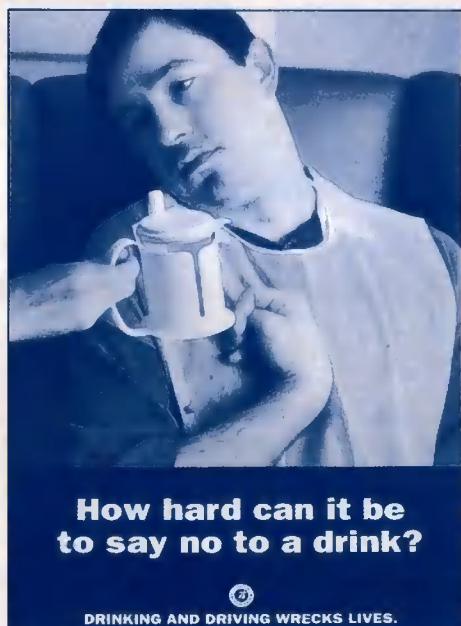
- There is widespread awareness of government safety campaigns and a belief that they are generally effective.
- Motorists believe priority for government spending on safety campaigns should be drink-driving and driving slower in towns.
- The most effective current campaign is "Drinking and driving wrecks lives". Of older campaigns, many people remember the "Clunk-Click" advertisements and believe they were effective.
- There is widespread support for the new written driving test and a growing belief that the driving test does ensure that new drivers are safe road-users.
- A third of drivers believe they would fail their test if they took it tomorrow.
- On a sample of three questions from the new written driving test, three quarters of existing motorists "failed" (i.e. failed to get two or more right) within this year's Lex Report survey.

This section examines the perceived effectiveness of government safety campaigns and looks at where motorists believe future priorities should be. It then goes on to look at attitudes to the new written driving test and tests people on a sample of three questions.

4.1. The effectiveness of government campaigns

The research conducted for the Lex Report shows that there is both high awareness of government road safety campaigns and widespread belief that they are effective.

When asked about government advertisements the main areas of spontaneous recall were of the high profile drink-driving (91%), car security (78%) and speeding (66%) campaigns.



When probed which advertisements they remembered, the highest recall was for recent campaigns such as "Drinking and driving wrecks lives" and "Kill your speed. Not a child" (see figure 4.1). Some of the older campaigns, with catch-phrases that became part of everyday vocabulary are still recalled; 74% remember the Green-Cross code advertisements and 61% the "Clunk-Click Every Trip" campaign with Jimmy Saville.

Perceived effectiveness of these advertisements is high, according to the Lex Report survey, particularly for drink-drive, speeding and using seat belts. An effectiveness measure was derived by

If I was Transport Secretary for the day..... **"I would implement a road education programme about road safety. We need to increase general awareness about road safety issues across the board."** Male, 49 years old.

4. Education and information

Figure 4.1 **Awareness and effectiveness of government safety campaigns**

	Aware of...	Believe effective...	Ratio of effectiveness to recall
	%	%	
Drinking and driving wrecks lives	82	47	57
Kill your speed. Not a child	81	41	51
Car crime. Together we'll crack it	75	14	19
Always follow the Green Cross code	74	20	27
Clunk-click. Every trip.	61	37	61
Speed kills. Kill your speed	59	17	29
Never forget. Clunk-click	37	16	43
Stop, look, listen, live	32	5	16
Wear a helmet. It could save your life	31	8	26
Tough nuts are hard to crack	8	1	13

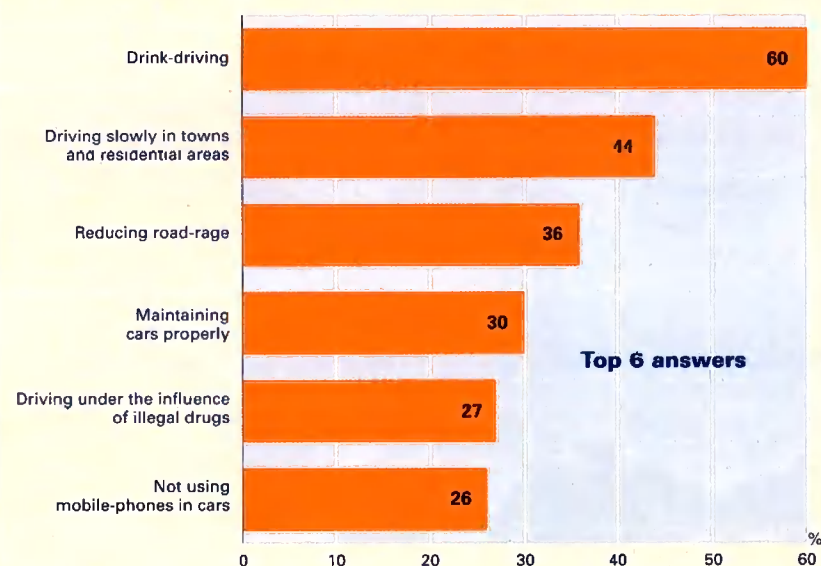
Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

looking at the ratio of the people saying an advertisement was effective to the people recalling it. The Clunk-Click advertisement was most effective on this measure, with the Drink-Drive campaign a close second. The least effective are the "Car Crime", "Tough nuts" and "Stop, look, listen, live" campaigns.

The perceived priorities for future government spending in this area are clear (see figure 4.2) - with drink-driving and driving slower in towns as the main priorities. The high awareness of road-rage means this is an area many now believe should be the target of government campaigns (36%). Other priority areas are the use of drugs whilst driving, the use of mobile phones whilst driving and car maintenance.

Figure 4.2 **Priorities for government campaigns**
Where should the government spend most money...



Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Motorists believe government priorities should be drink-driving and driving more slowly in towns.

4. Education and information

4.2. The new written driving test

The new written driving test has been taken by few of today's motorists. 81% of drivers think it is a good idea, however, and this may be why there has been a rise in the perceived effectiveness of the test in ensuring new drivers are safe road-users (see figure 4.3). 64% now think the test is effective, compared to 55% in 1989.

Perhaps this rise in the perceived effectiveness of the test is why nearly a third of all drivers think they would fail their driving test if they were to take it again tomorrow. To test whether this was true, respondents were asked three questions from the new written test to see how many of them would "pass" (correct answers are given at the bottom of page 35):

1. Where can you find amber studs on a motorway?
 - a. Separating the slip road from the motorway
 - b. On the left hand edge of the road
 - c. On the right hand edge of the road
 - d. Separating the lanes
2. Which three are legally authorised to direct traffic?
 - a. A school crossing warden
 - b. A teacher in charge of children crossing the road
 - c. A farm worker in charge of livestock crossing the road
 - d. A road worker operating a stop-go board
 - e. Anyone assisting the driver of a large vehicle to reverse
 - f. A traffic warden
3. Your vehicle is parked on the road at night. When must you use your sidelights?
 - a. Where there are continuous white lines in the middle of the road
 - b. Where the speed limit exceeds 30 mph
 - c. Where you are facing oncoming traffic
 - d. Where you are near a bus stop

"I would make the driving test longer with more practical tasks like parking between two parked cars. I think that would be more useful than the new written test, as quite a lot of people do not like written tests."

Female, 38 years old.

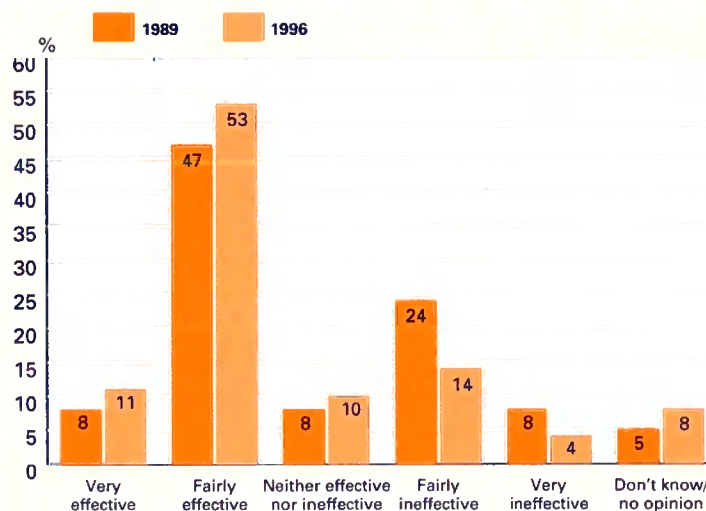
"I think you should make the driving test more diverse and include motorway driving as part of it. At the moment you can take your test and drive home on the motorway without any tuition whatsoever." *Male, 25 years old.*



4. Education and information

The driving test is seen as effective in making safe drivers by a rising number of today's motorists.

Figure 4.3 **Perceived effectiveness of driving test at ensuring new drivers are safe and competent road-users**



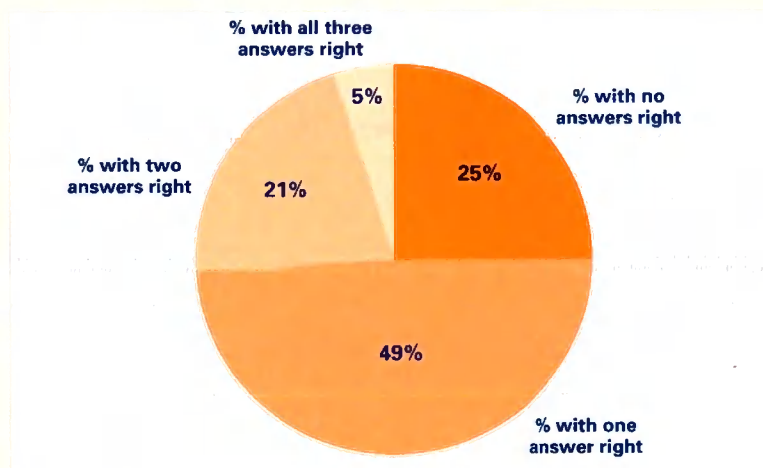
Base: All car drivers
Source: Lex Report on Motoring/MORI

Only 5% got all three correct (see figure 4.4) and three quarters got one or less right, which would represent a fail on the test. If everyone had answered Q1 and Q3 randomly, more people would have got the answer right than did in the Lex Report survey.

(Answers. Q1: c., Q2: a,d,f. Q3:b)

Most respondents "failed" the written driving test questions i.e. they got less than two out of three questions right.

Figure 4.4 **Pass rate on selected questions from the new written driving test**



Base: All car drivers (1209)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

5. Policies for safer roads

- The safety of road users is seen by many as being of lower importance than the problems caused by congestion and pollution.
- It is believed the most effective road safety policies are those that single out poor drivers, such as speed cameras.
- Motorists who regularly speed believe that having more speed cameras and on the spot fines would be the best deterrent for them.
- There is strong support for compulsory retesting of people who have been banned from driving and for motorists who have reached 70 years of age.
- A rising number of motorists say that speed cameras have permanently affected their driving behaviour, although 30% say they just slow down for the cameras.
- Over two and a half million people have been "flashed at" when speeding past a speed camera and 84% of these were men.

In this section the relative importance of road safety to the public is examined and what road users' priorities are for safety policies. It then goes on to look at policy options for reducing speeding and the impact of speed cameras.

5.1. Views on transport policies

In last year's Lex Report, which focused on transport policy, respondents were asked to prioritise their transport concerns (see figure 5.1). The two major issues for both drivers and non-drivers are traffic congestion and air pollution. The safety of pedestrians and cyclists is seen as a major problem by half of respondents, whilst the safety of car users was seen as a major problem by just one in three.

These results support the hypothesis that whilst safety is an issue, it is not a top priority for many people and is certainly secondary to congestion and pollution problems.

Against this background, respondents were asked in this year's Lex Report survey which policy options they felt would be most effective in

improving road safety (see figure 5.2). Education and publicity, which many believe has historically been effective (see section 4), was the third most popular option. Top of the list, however, was the introduction of more speed cameras (see section 5.3).

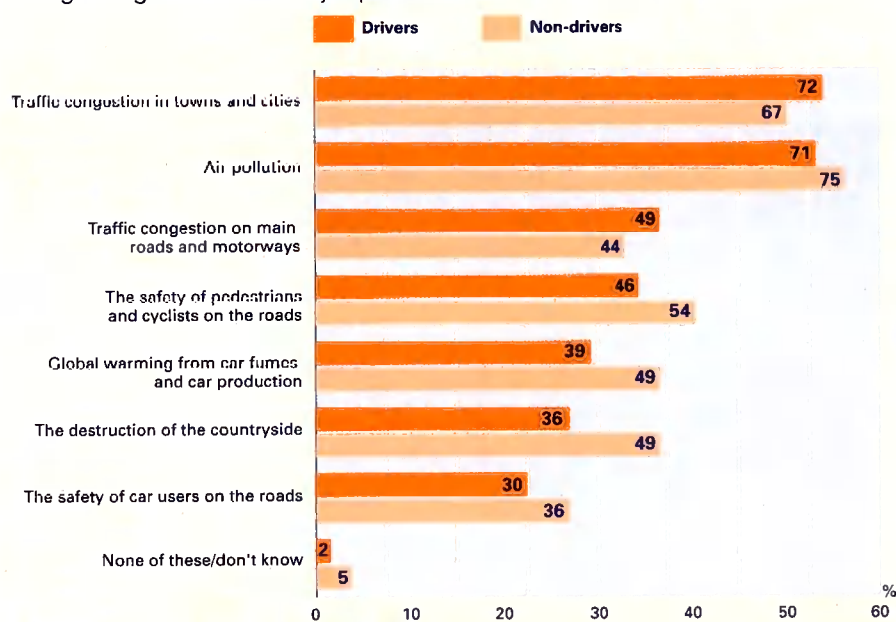
Three of the four most popular options singled out poor drivers; speed cameras, signs that flash "slow down" to speeding

If I was Transport Secretary for a day..... **"I would put in more speed cameras, especially in 40mph areas where there are housing estates near by. I would also put in more speed bumps in residential areas."** Male, 25 years old.



Figure 5.1 **Concerns about road travel**
% agreeing issues are major problems

Safety of car users is a lower priority than congestion and pollution for most drivers and non-drivers.



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

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

motorists and the introduction of more cameras at traffic lights. Most of the popular options related to reducing speeding.

The least effective options were thought to be the reduction of speed limits on motorways and in residential areas, together with the building of more motorways. This latter point may reflect the belief held by some motorists that motorways are dangerous, whereas drivers are nine times more likely to have an accident driving a mile on an A road than on a motorway.

Figure 5.2 **"Which of these, if any, would be effective in improving road safety?"**

	Car drivers	Truck drivers
	%	%
Introducing more speed cameras	53	39
Flashing "slow-down" signs at speeding vehicles	48	42
More education, training and publicity	46	56
Introducing more cameras at traffic lights	39	28
Creating more cycle lanes	36	32
Building more town and city by-passes	36	53
Creating more pedestrian only areas	32	15
More traffic-calming measures	29	20
Reducing speed limits in residential areas to less than 30mph	26	29
Building more motorways	11	31
Reducing speed limits on motorways/dual carriageways	10	7

Base: All car drivers (1209), Truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

5. Policies for safer roads

5.2 Policy options to reduce speeding

Speeding is cited as a major cause of accidents and it has been shown in this year's Lex Report survey that a large minority of drivers speed as a matter of course in everyday driving situations, both in town and on main roads and motorways. These drivers who break the speed limit or consider speed limits discretionary were asked which measures they felt would personally make them less likely to speed. The results were clear; "catch us and fine us on the spot". Two-thirds of these speeders felt that more speed-cameras would be effective, with 46% saying on the spot speeding fines would work. Few of them felt government publicity (19%), publishing their names in the local paper (21%), installing tachographs (15%), or having speed limiters on cars (21%) would be effective deterrents.

The general driving public were also asked which of the options put to the regular speeders they would be willing to support. The results showed that policies the motorist at large would support were broadly in line with what speeders thought would be effective, although apart from speed cameras, support for any of the proposed measures was surprisingly low (for further details on speed cameras see section 5.3). This may reflect the complacency of many people with respect to road safety in Britain today (see section 5.1). There was general support for hard-hitting anti-speeding campaigns, although speeders felt these were ineffective.

If I was Transport Secretary for the day..... **"I would cut speed limits on all roads and have more traffic police. I would also have stiffer penalties for road offences."**

Male, 47 years old. "Bigger penalties for speeding."

Female, 33 years old.

"I would cut the speed limits of coaches and I would also ban them from the third lane of motorways. I would cut speed limits near to schools and if necessary put speed cameras outside schools."

Male, 22 years old.



Figure 5.3 **Perceived effectiveness in reducing speeding**

	Personally affect regular speeders	Support from driving public
	%	%
More speed cameras with fines if over 20 mph over limit	66	55
On the spot speeding fines	46	39
Banning people caught over 30 mph over limit on motorway*	39	33
Heavier penalties for people over speed limit	36	31
Banning people caught over 10 mph over limit in residential areas*	36	23
Installing more speed bumps	34	24
Police enforcing limits more strictly	28	30
Having speed limiters on cars	21	17
Publishing names and addresses of offenders in local paper	21	16
Hard-hitting anti-speeding publicity campaign	19	30
Installing tachographs in cars	15	11

Base: 'Speeders' (901), All car drivers (1209)

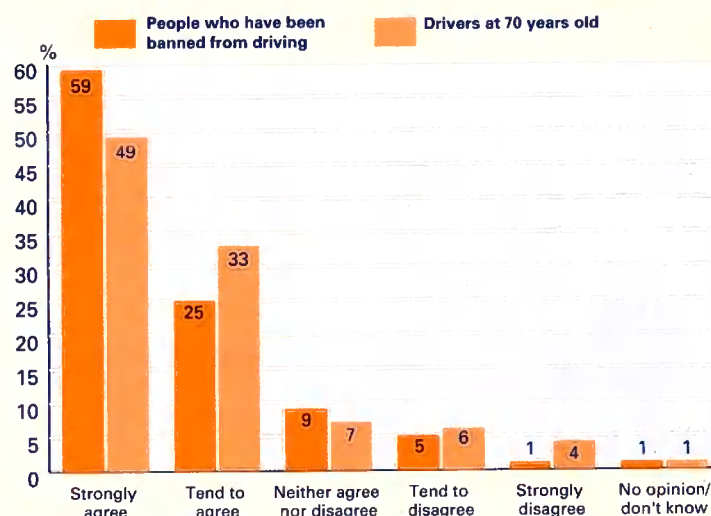
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

* Banning for 3 months

Other areas where there was strong support for legislative change were in ensuring that drivers are compulsorily retested at 70 years old and when they have been banned from driving (see figure 5.4). More than eight in ten would support both legislative changes, although perhaps not surprisingly support amongst the over 55's for compulsory retesting at 70 years of age was considerably lower, although there was still net support of 35%.

Figure 5.4 **Support for compulsory retesting**
% agreeing they should be retested

Most motorists believe those who have been banned should be retested, as should older drivers.



Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

5. Policies for safer roads

5.3. The effectiveness of speed cameras

Speed cameras have become an everyday part of driving in Britain for many. The Lex Report research this year looked at how effective drivers believe they have been and how many people have been caught speeding by them.

Awareness of speed cameras has risen substantially since it was researched for the Lex Report in 1993. Awareness at that time was 66%, it has now risen to 89% of drivers.

The impact of speed cameras on those who are aware of them has risen slightly over this three year period (see figure 5.5). In 1993, four in ten drivers said it made no difference to their speed when they drove past them - this has now fallen to under a third. Over a third of people say they drive generally slower on these roads. Three in ten say they just slow down for the cameras. This was more prevalent amongst men, young people and company provided car drivers.

Respondents were also asked if speed cameras had more generally affected their driving on other main roads. 27 % said it made them drive generally slower, compared to 22% in 1993.

The Lex Report research shows conviction by speed camera is rare. This is likely to change with the current introduction of digital recording, because in the past film in the cameras tended to quickly run out.



- 24% of drivers have to their knowledge exceeded the limit when going past a speed camera, at some time in the past (71% of which were men).
- 39% of these were, to their knowledge, "flashed" at by the camera. In total, therefore, 9% of drivers or 2.4 million people have been flashed at by speed cameras (84% were men).

"I would put more speed cameras in areas where there are schools." Female, 33 years old. "To slow speeds down I would put in more cameras. This would help keep hotheads off the road."

Male, 22 years old.

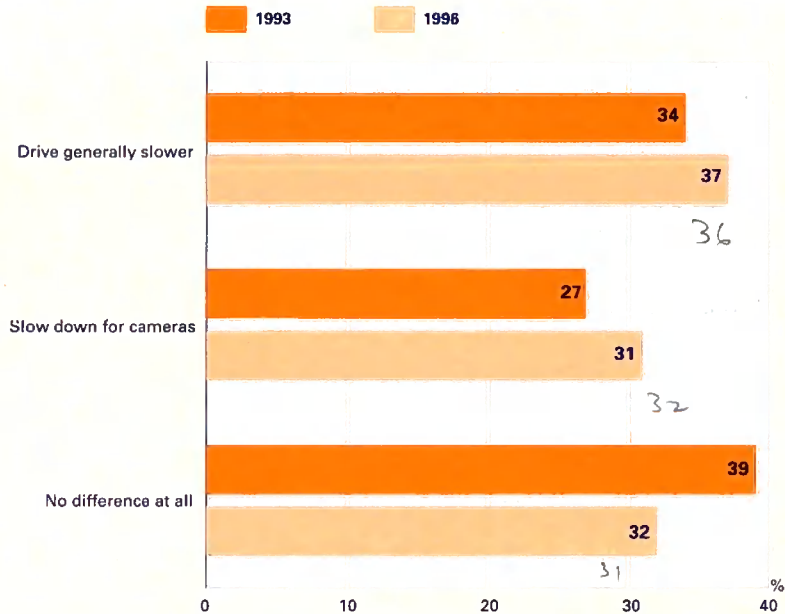
"The introduction of speed cameras has proved effective, not just at catching people speeding, but in changing people's behaviour. This is the real challenge for the 21st century - to make people want to be safer drivers every time they go out on the road." Lex Service.



5. Policies for safer roads

Figure 5.5 **Effectiveness of speed cameras**

Impact on roads with speed cameras

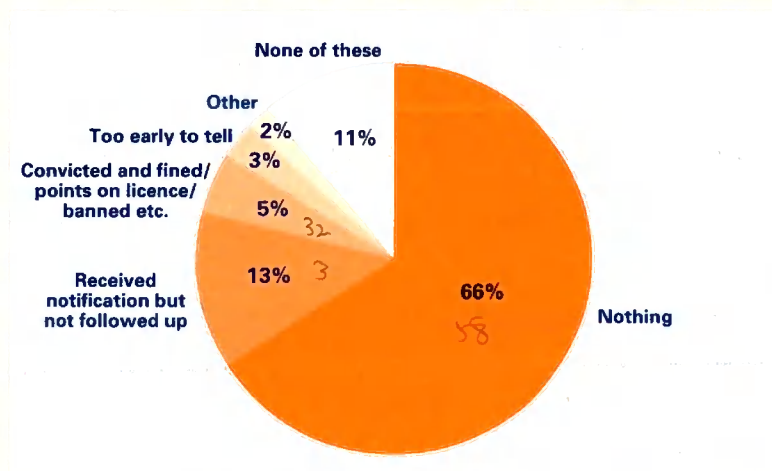


Base: All those aware of having driven along roads with speed cameras

Source: Lex Report on Motoring/MORI

- These drivers estimate on average they were going 12 mph over the speed limit whilst 6% estimated they were going more than 20 mph over the speed limit at the time.
- Of these drivers, only one in eight were prosecuted (see figure 5.6).

Figure 5.6 **What happens after the camera flashes?**



Base: All been photographed while exceeding speed limit (137)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

The effectiveness of speed cameras in reducing speeds appears to be increasing slightly.

Most people who think they have been flashed at by a speed camera have not been subsequently convicted for speeding.

6. The safety of the cars we drive

- Travelling by car has become much safer over the past fifty years, with deaths on the road falling by 30% between 1990 and 1995 alone, as a result of amongst other things: the greater use of motorways, seat belts and less drink-driving.
- Motorists believe that manufacturers have made the greatest progress in the area of safety.
- Safety is not a top priority for many motorists when choosing their cars. Their top priorities are price, size and economy.
- Of rising importance when choosing a car are acceleration and security features, with environmental performance slipping in importance since 1992.
- Newer cars and particularly company cars are more likely to be in accidents, according to the Lex Report research, reflecting the attitudes of the drivers and the higher mileage they cover.
- There is a growing belief that the MOT is an effective way of ensuring cars on the road are safe.

In this section the changing safety record of the car is examined. It then goes on to look at safety as a factor in car buying, relative to other considerations, before examining the role of the age of a car and the MOT in ensuring cars are safe.

6.1. The safety record of cars

Over the past fifty years, the combination of better cars, better roads and better public awareness has made travel by car much safer. Figure 6.1 shows that despite car travel rising by 600% between 1950 and 1995, the number of road deaths fell by 28% in total over the period and by 55% from its peak of 8,000 deaths in 1966. The most dramatic decline during this period has occurred in the past five years, when road deaths fell from 5200 per annum to 3600 per annum. This has been brought about by amongst other things more use of seatbelts, greater use of motorways and less people drink-driving.

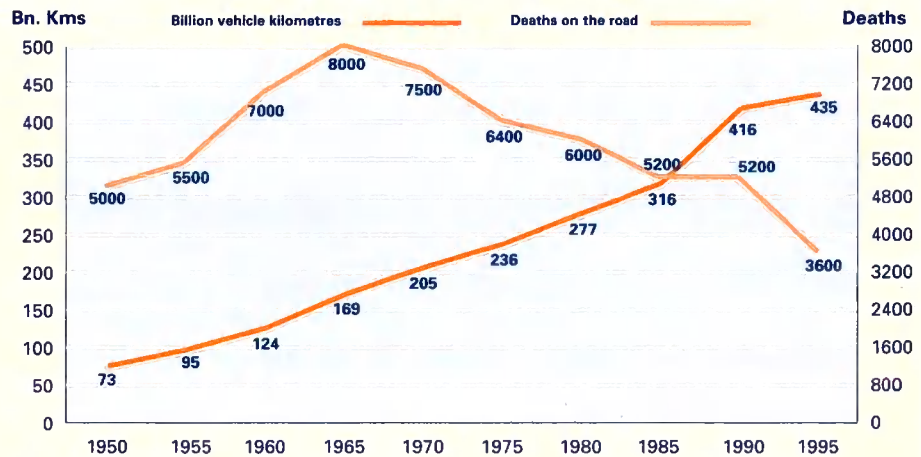


The number of reported accidents has risen as traffic has increased, but in total since 1950 accidents rose by just 38% and injuries caused by road traffic rose by 55%. The number of accidents per vehicle mile driven has fallen by 78% since 1950 (see figure 6.2). If a driver is involved in an

If I was in charge of a car manufacturer for a day..... **"Most cars are already pretty safe, but I would like to see all cars with ABS, airbags and side impact bars. There should also be crumple zones to protect driver and passenger."** Male, 36 years old.

6. The safety of the cars we drive

Figure 6.1 **Car mileage and road deaths**



Source: Department of Transport

Deaths on the road have fallen even though traffic has dramatically increased.

accident today, they are now only half as likely to receive fatal injuries as they were in 1950. Much of this decline in deaths and serious injuries has been the responsibility of manufacturers, with the introduction of safety devices from seat belts to crumple zones to airbags and side impact bars. Even now though there are substantial differences in the safety performance of different makes and models.

Despite this improvement in the safety performance of cars, aeroplanes remain by far the safest way to travel, even though aircraft accidents command headline news.

Figure 6.2 **The safety of Britain's roads**

	Road accidents/000's	Accidents per million kms	Deaths per 1000 accidents
1950	167	2.3	30
1955	217	2.3	25
1960	272	2.2	26
1965	299	1.8	27
1970	267	1.3	28
1975	246	1.0	26
1980	252	0.9	24
1985	246	0.8	21
1990	258	0.6	20
1995	230	0.5	16

Source: Department of Transport

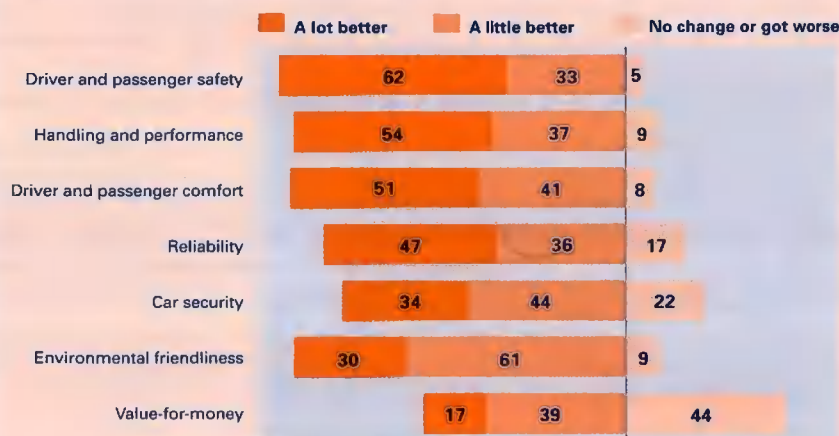
The safety of Britain's roads has improved dramatically with fewer accidents per mile driven and less deaths per accident.

6. The safety of the cars we drive

6.2. Safety features and consumer expectations

Some of the consumer complacency with regards to safety identified in this year's Lex Report may be due to the progress manufacturers have made. Data from last year's survey showed that driver and passenger safety was the area where drivers felt manufacturers had made the most progress over the past ten years (see figure 6.3). 62% believed manufacturers had improved a lot and 33% thought they were a little better.

Figure 6.3 Improvements in manufacturers over the last ten years



Base: All drivers (1229)

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

Motorists seem to take the safety of modern cars for granted, with safety not being the main issue on which they choose their cars (see figure 6.4). It is fourth on the list of important features after price, fuel consumption and size, although safety rates above styling and environmental

performance. It has not risen in importance since the question was asked in 1992. More people say safety will be important in their next purchase (48%), but this was also the case when the question was last asked in 1992 and this increased priority does not appear to have materialised.

The buying priorities that have become more important since 1992 are acceleration and security features. Environmental performance has declined slightly in importance, even though only 30% of drivers felt that

"I think cars are almost as safe as we can make them. It's people's driving that we need to pay attention to."

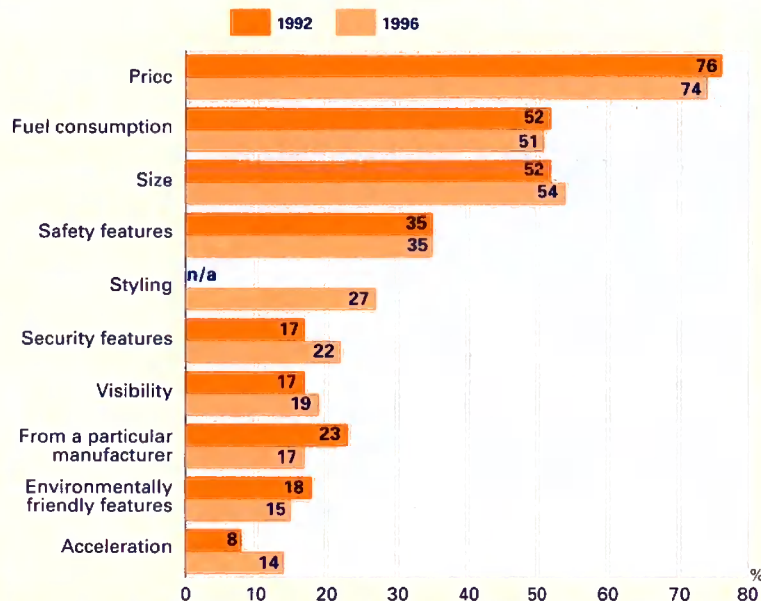
Male, 36 years old. "If I was in charge of a car manufacturer I would do exactly what they have done to improve safety." Male, 76 years old.



6. The safety of the cars we drive

Figure 6.4 **The relative importance of safety when choosing a car**

Which of these features were particularly important to you when you last bought a car?



Base: All bought car in last two years
Source: Lex Report on Motoring/MORI

Safety is not the deciding factor when most people are choosing their car and shows no sign of changing.

manufacturers have improved a lot in this area. This was a lower figure than for every category except value-for-money.

Although safety features are not the key competitive issue on which cars are judged, motorists increasingly expect their cars to have the latest features (see figure 6.5). Although only one in five drivers has ABS or driver airbags in their current cars, six in ten expect to have them on their next car. Over four in five would have all the major safety features if money was no object, whereas only a third would have a mobile phone and four in ten 4-wheel drive.

Figure 6.5 **The important safety features on a car**

	Have on current car	Expect on next car	Would like on next car (money no object)
	%	%	%
Power assisted steering	41	66	83
ABS (anti-lock braking system)	22	57	83
Driver airbag	22	61	84
Side impact protection bars	21	42	76
Car telephone/mobile phone	7	9	34
Passenger airbag	6	42	81
4 wheel drive	2	8	42
Speed limiter	1	4	18
Bull bars	1	2	8
None of these	47	9	1
Don't know/no opinion	1	8	3

Base: All car drivers (1209)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Motorists expect their next car to have all the latest safety features, such as ABS and airbags.

6. The safety of the cars we drive

6.3. Car maintenance and MOT's

When respondents in this year's Lex Report survey were asked about the last accident they were involved in, around 2% said it was at least partially caused by an old or mechanically unsafe car. Cars themselves therefore, do not seem to be a major road safety problem.

Whilst the rise in new safety features on cars might lead to the assumption that people driving newer cars are less likely to be injured or killed if involved in a road accident, the Lex Report research suggests that this does not reduce the likelihood of having an accident. It can be seen in figure 6.6 that those who have had an accident in the last 3 years are more likely to have a newer car.

This may be because newer cars are increasingly powerful and many new cars are driven by company car drivers, who tend to be high-mileage motorists and many of whom admit to poor driving behaviour. This is supported by government data on accident rates, which shows that company car drivers are 30% more likely than private car drivers to be killed and 38% more likely to be injured when they are involved in an accident. The National Travel Survey, however, has shown that when accident rates are adjusted for mileage, company car drivers have less accidents per mile.

If I was Transport Secretary for the day..... **"I would get all the clapped out old bangers off the road."** *Female, 48 years old.* **"I would tighten up the MOT and make it a lot harder."** *Male, 69 years old.*

"The changes in the MOT test, which have made it much more rigorous, have been instrumental in getting many dangerous and polluting older cars off the road. Initiatives such as this play an important role in improving road safety." *Lex Service.*



6. The safety of the cars we drive

Figure 6.6 **Do new cars mean safe cars?**

It is newer cars, not older cars, that are more likely to be involved in accidents.

	All	Had accident in last year	Never had an accident
<i>Age of car driven most often</i>	%	%	%
Upto 3 years old	29	43	24
4-6 years old	24	15	24
7-9 years old	22	16	25
Over 9 years old	25	26	25

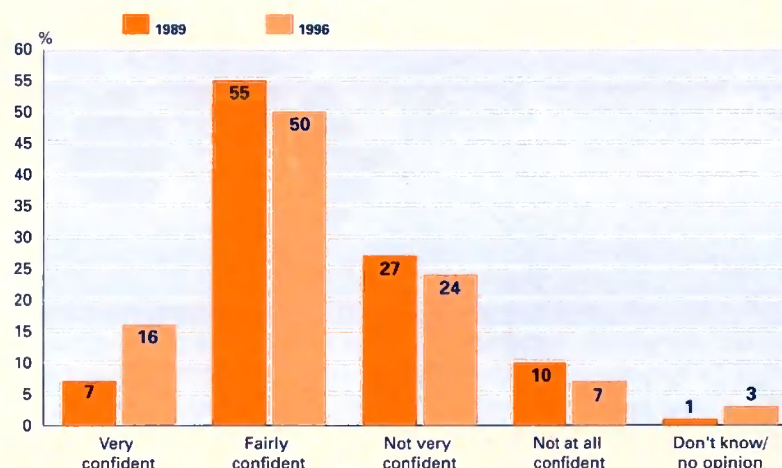
Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

The responsibility for ensuring older cars are reasonably safe and road worthy falls on the owner and is only checked yearly through the MOT testing system. Confidence that cars passing the MOT are safe to drive on public roads has risen slightly since the question was last asked in a Lex Report survey in 1989 (see figure 6.7). Those with some confidence in the test has risen from 62% to 66%, reflecting the more stringent testing procedures now in place and the rise in confidence and satisfaction with car servicing generally. The numbers very confident about the MOT test has risen from 7% in the 1989 Lex Report survey to 16% in the current survey.

Figure 6.7 **Confidence in the MOT test**

Confidence that cars that pass the MOT are safe to drive on public roads



Base: All car drivers

Source: Lex Report on Motoring/MORI

There is rising confidence that the MOT test ensures cars are safe and road-worthy.

1997 Lex Report on Motoring

An overview of car ownership
and retailing

7. Car ownership and car sales

7.1. Car ownership in the UK

The number of cars in use has risen by over 20% in the last ten years, compared to population growth of 4%. There has been more than one car per household on average since 1989 and the growth continues (see figure 7.1).

The car is an integral part of life in Britain, with the car accounting for 86% of all passenger miles.

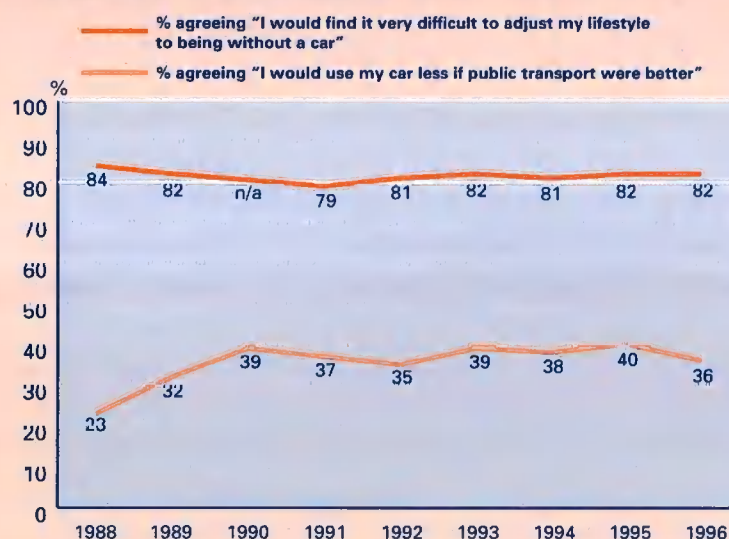
A consistent four-fifths of motorists agree "I would find it very difficult to adjust my lifestyle to being without a car" (see figure 7.2). This year, slightly fewer motorists (36%) say they would use their car less if public transport were better.

Figure 7.1 **Car ownership in the UK**

	1986	1991	1996
Population (millions)	56.8	57.7	58.8
Households (millions)	21.5	22.8	24.1
Cars in use (millions)	20.0	23.4	25.3
People/household	2.64	2.53	2.44
Cars/household	0.93	1.02	1.05
Cars/person	0.35	0.41	0.43

Source: SMMT, Department of Environment, Government Actuary

Figure 7.2 **Reliance of drivers upon the car**



Base: All car drivers

Source: Lex Report on Motoring/MORI

7. Car ownership and car sales

7.2. Car ownership in the US and Europe

Car ownership in the UK is at the EC average in terms of cars per person. Car ownership is continuing to rise slowly in the UK, whilst it has levelled off in countries with higher car ownership such as Germany and the US (see figure 7.3). Italy is now the country with the highest car penetration in the EC at 530 per thousand population, whilst the US has been static at around 590 cars per thousand population for many years.

The rate at which the UK is approaching the car penetration levels of Germany and the US has slowed significantly and may not rise much further (see figure 7.4).

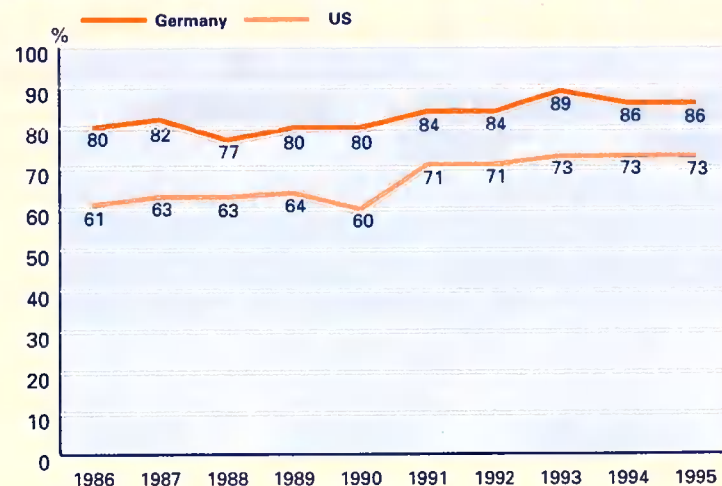
Figure 7.3 **Cars per 1000 population in Europe and the US**

	1986	1991	1995
France	450	420	430
Germany	450	500	500
Italy	380	500	530
Netherlands	340	370	370
Spain	250	320	420
UK	360	420	430
EC	360	400	430
US	590	590	590

Source: SMMT

Figure 7.4 **Comparison of car penetration in the UK with the US and Germany**

Cars per 1000 people in the UK as a % of cars per 1000 people in...



Source: SMMT

7. Car ownership and car sales

7.3. New car sales in the UK

Car sales in Britain rose through 1996, but with the proportion of people buying new remaining static at a quarter of total cars sold. This proportion has been consistent at around this level for the past six years, having fallen from 30% of all cars in 1989 (see figure 7.5).

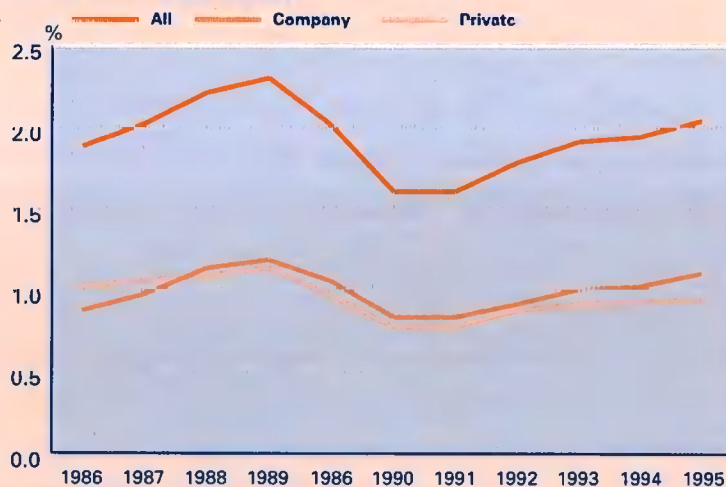
New car sales went above two million during 1996 for the first time since 1990, representing the highest number since the peak of 2.3 million in 1989. Private car buyers came back to the new car market in the spring and late 1996, as a result of good deals and a growing economy (see figure 7.6).

Figure 7.5 **Proportion of people buying new versus used cars**

	Millions of people buying per annum	% buying new	% buying used
1989	5.2	30	70
1990	5.3	28	72
1991	5.3	23	77
1992	5.5	22	78
1993	5.9	25	75
1994	5.8	22	78
1995	6.6	24	76
1996	7.8	25	75

Base: Those who bought a car in the previous 2 years
Source: Lex Report on Motoring/MORI

Figure 7.6 **New Car Sales**



Source: Department of Transport

7.4. New car sales in Europe

New car sales rose across all the major EC economies during 1996, ranging from 4% growth in the Netherlands to 7% growth in Spain. Total sales in the six major economies in Europe rose to 10.7 million, with over 70% of that accounted for by Germany, France and the UK (see figure 7.7).

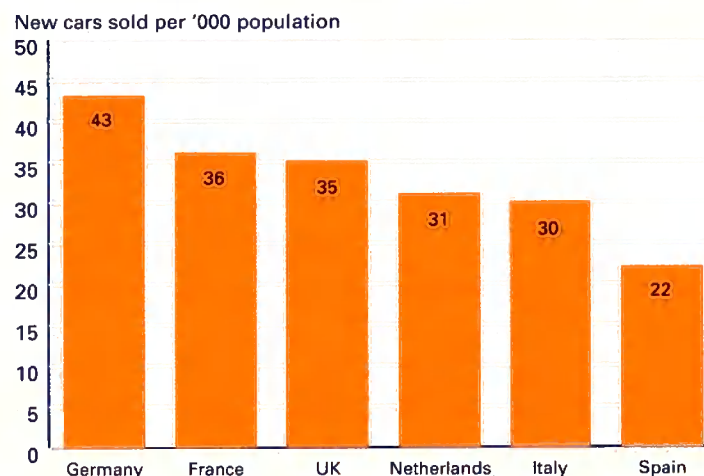
New cars sold per 1000 population shows significant variation across the major EC economies. It is highest in Germany at 43 per 1000 population, compared to the lowest figure of 22 for Spain and the UK in the middle at 35 (see figure 7.8). This reflects levels of economic development.

Figure 7.7 **Registration of new cars in Europe**

Millions	Germany	Italy	France	Spain	UK	Netherlands
1986	2.83	1.83	1.81	0.69	1.88	0.56
1987	2.92	1.98	2.11	0.93	2.01	0.56
1988	2.81	2.18	2.22	1.07	2.22	0.48
1989	2.83	2.36	2.27	1.15	2.3	0.50
1990	3.04	2.35	2.31	1.01	2.01	0.50
1991	3.43	2.34	2.03	0.91	1.59	0.49
1992	3.93	2.37	2.11	1.01	1.59	0.49
1993	3.19	1.89	1.72	0.78	1.78	0.39
1994	3.21	1.61	1.97	0.94	1.91	0.43
1995	3.30	1.63	1.96	0.84	1.95	0.45
1996e	3.51	1.63	2.13	0.88	2.03	0.47

Source: SMMT/from local statistics
e=estimate

Figure 7.8 **New car sales per person throughout Europe (1996)**



Source: SMMT

7. Car ownership and car sales

7.5. Expectations of future levels of ownership

The proportion of motoring households with two cars, as measured by the Lex Report survey, has plateaued at 42% (apart from an apparent aberrant result in 1995). Despite this, 50% of the motoring public expect there to be two or more cars in their household in two years time, a slightly lower figure than last year.

When these future expectations are grossed up into actual cars on the road, Britain's motorists predict that there will be another 900,000 cars on the road in two years time. This measure provided a good predictor during the boom years of the late 1980's, but has been over optimistic since then.

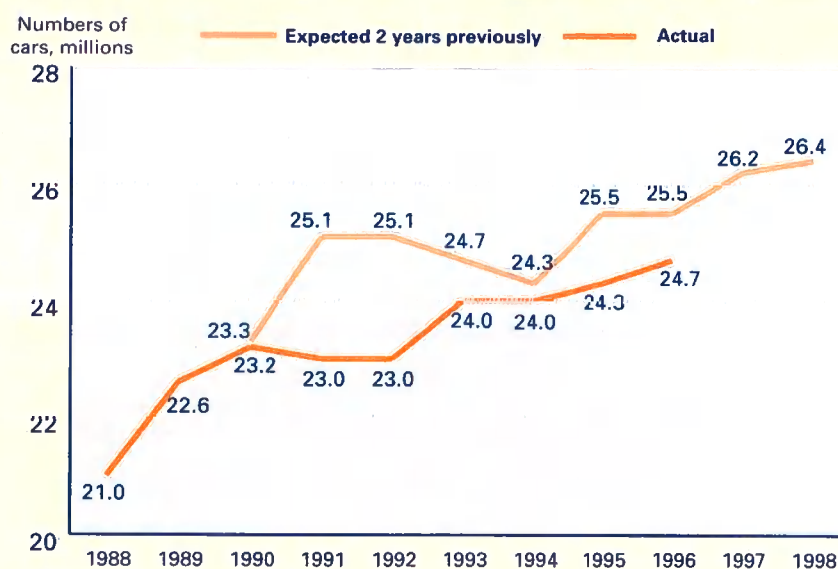
Figure 7.9 **Current and expected levels of car ownership**

		None	One car	Two+ cars
		%	%	%
Actual	1988	—	61	39
Actual	1989	—	55	45
Actual	1990	—	56	44
Actual	1991	—	58	42
Actual	1992	—	59	42
Actual	1993	—	58	42
Actual	1994	—	58	42
Actual	1995	—	53	47
Actual	1996	—	58	42
Expected in 1995	1997	1	47	52
Expected in 1996	1998	1	49	50

Base: All drivers

Source: Lex Report on Motoring/MORI

Figure 7.10 **Grossed up estimates of numbers of cars in Britain at time of surveys and expectations in two years time**



Base: All drivers

Source: Lex Report on Motoring/MORI

N.B. The 1995 figure has been adjusted in the light of this year's results

7. Car ownership and car sales

The proportion of households with cars has now reached 70% (see figure 7.11). It is the combination of increasing numbers of households, an increasing proportion of households with cars and increasing numbers of multi-car households that has created the dramatic historic rise in the car parc.

Another important factor, along with economic growth, that will ensure continued growth in the car parc is the number of women drivers. 55% of women now have licences compared to 81% of men, but the difference is diminishing rapidly. If 81% of women had driving licences, this would mean there would be another six million drivers on the road.

Figure 7.11 **Grossed up estimates of cars in Britain at time of surveys and expectations in two years' time**

	Households in GB (DoE) million	Households with cars (OPCS) %	Ave. cars per household (MORI)	Grossed up no. of cars million	Expectations in two years' time		
					Year of expectation	Cars per household	Grossed up no. of cars million
1988	21.5 <i>22.0</i>	66.0	1.47	21.0 <i>20.9</i>	1990	1.59	23.3
1989	21.7 <i>22.2</i>	66.0	1.53	22.6 <i>21.9</i>	1991	1.67	25.1
1990	21.9 <i>22.4</i>	67.0	1.55	23.2 <i>22.7</i>	1992	1.63	25.1
1991	22.1 <i>22.8</i>	68.0	1.51	23.0 <i>22.7</i>	1993	1.59	24.7
1992	22.5 <i>23.0</i>	67.8	1.52	23.0 <i>23.2</i>	1994	1.55	24.3
1993	22.7 <i>23.3</i>	68.6	1.50	24.0	1995	1.60	25.5
1994	22.9 <i>23.6</i>	69.0	1.50	24.0	1996	1.57	25.5
1995	23.1 <i>23.9</i>	69.7	1.50	24.3	1997	1.59	26.2
1996	23.4e	70.0e	1.51	24.7	1998	1.60	26.4
1997	23.5e	70.0e					
1998	23.6e	70.0e					

e = estimated

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. The 1995 average cars per household figure has been adjusted down in the light of this year's results.

Base: All drivers

Source: Lex Report on Motoring/MORI

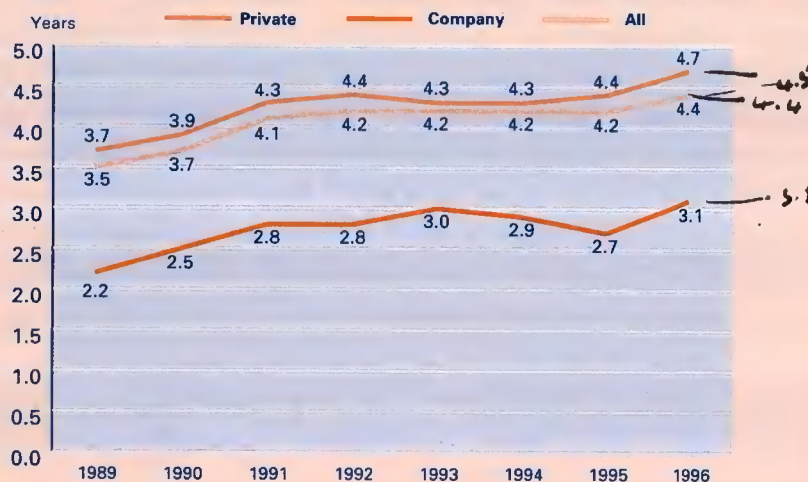
7. Car ownership and car sales

7.6. Current and expected length of car ownership

Replacement cycles are one of the major factors behind car sales. The replacement cycle was 3.5 years in 1989 and then rose during the recession to 4.2 years. It was predicted that there would then start to be a return to pre-recessionary levels. This has not happened and the level has stayed constant before rising in 1996 (see figure 7.12). Expected length of ownership of company cars has risen sharply in the last year, particularly the proportion expecting to keep their cars for four years or more.

Company provided cars are replaced on a shorter cycle than privately owned cars, (see figure 7.13). Private used car buyers are on a similar replacement cycle to private new car buyers.

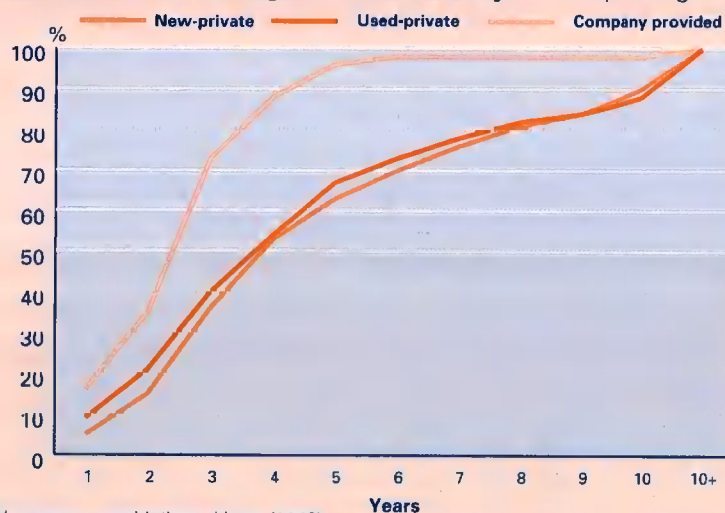
Figure 7.12 **Current and expected length of car ownership**
Average length of ownership (total period owned and expected future ownership)



Base: All drivers

Source: Lex Report on Motoring/MORI

Figure 7.13 **Expectations of length of ownership** – % expecting to sell after...



Base: All private and company provided car drivers (1149)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI
(Reweight excluding "don't knows")

7. Car ownership and car sales

7.7. Age of the car parc

The age of the car parc is rising due to the impact of lower new car sales in the early 1990's. In 1989 cars under three years old represented 36% of all the cars on the road, falling to 27% in 1996 (see figure 7.14).

Nearly half of all the cars on the road are now over six years old compared to just over a third in 1989 (see figure 7.15), with the greatest rise occurring in cars over nine years old, which generate more pollution. It is expected that this proportion will fall as higher new car sales in recent years feed through the system.

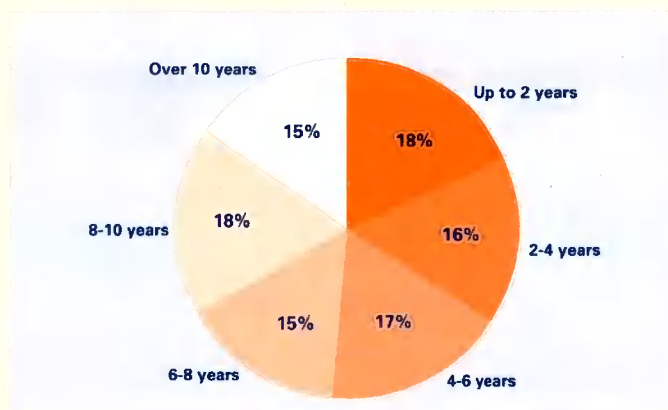
Figure 7.14 **The changing age of the car parc**

	1989	1992	1996
	%	%	%
0-3 years	36	29	27
3-6 years	27	32	24
6-9 years	19	18	22
Over 9 years old	16	20	26

Base: All drivers

Source: The Lex Report on Motoring/MORI

Figure 7.15 **Age of the car parc**



Base: All car drivers (all of their cars) (1853)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

7. Car ownership and car sales

7.8. Scrappage of cars in the UK

Scrappage of cars reflects the level of demand for cars, the stage of the economic cycle and the age structure of the car parc. It has been rising recently, as the economy has recovered and the cars from the boom period reach retirement (see figure 7.16).

New car sales have been rising, but at the same time more older cars have been scrapped, resulting in only a small increase in the total number of cars on the road.

Scrappage as a percentage of all cars on the road has risen from a low of 5.4% in 1992 to 6.9%* in 1996 (see figure 7.17).

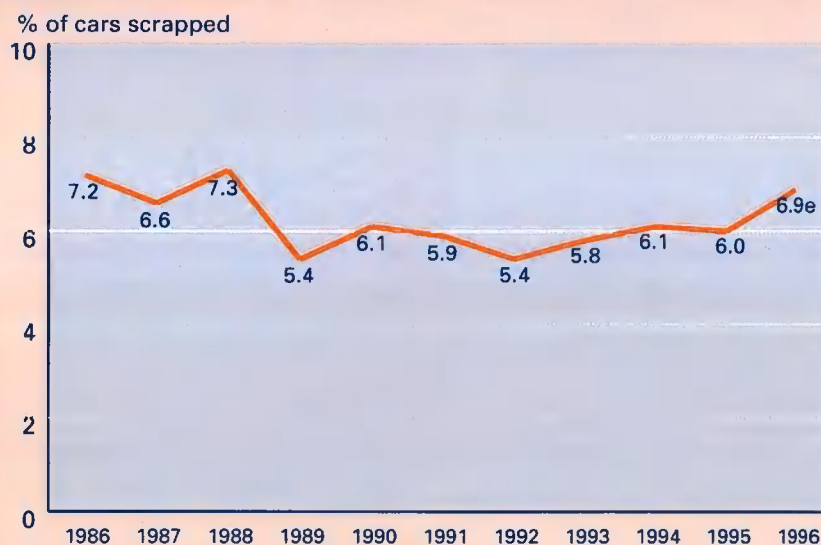
* estimate

Figure 7.16 Contributions to change in the car parc (UK)

Millions	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996e
New car registrations	1.88	2.01	2.22	2.30	2.01	1.59	1.55	1.78	1.91	1.95	2.03
Scrappage	1.40	1.32	1.51	1.15	1.38	1.37	1.26	1.38	1.47	1.48	1.73
Car parc	19.95	20.64	21.35	22.50	23.13	23.35	23.64	24.04	24.48	24.95	25.26
Net change in car parc	0.48	0.69	0.71	1.15	0.63	0.22	0.29	0.40	0.44	0.47	0.31

Source: SMMT
e = estimate

Figure 7.17 Changing scrappage rates (UK)



Source: SMMT
e=estimate

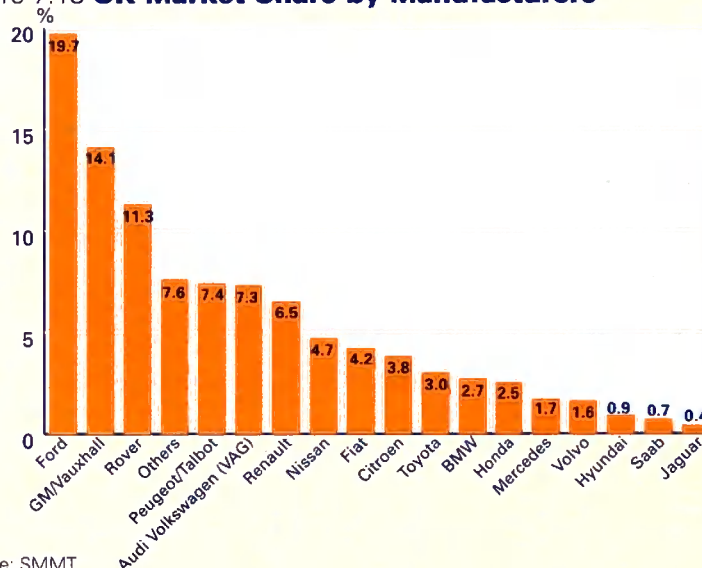
7. Car ownership and car sales

7.9. Registration of new cars by manufacturer

New car sales in the UK continue to be dominated by the big three manufacturers; Ford, Vauxhall and Rover. Together they accounted for 45% of total sales during 1996 or over 900,000 sales (see figure 7.18).

The picture is changing rapidly as the smaller manufacturers have increased their market share, whilst Rover, Ford and Vauxhall have stayed static or fallen behind (see figure 7.19). This reflects an open market, but also the low level of loyalty of today's motoring public - only 40% of new car buyers and 23% of used car buyers in the last two years bought the same make as their previous car.

Figure 7.18 **UK Market Share by Manufacturers**



Source: SMMT

Figure 7.19 **Changes in market share: 1991-1996**

Current market Sheet	Less than 2%	Volvo		Saab Honda Jaguar Mercedes	Hyundai
	2 - 5%			Toyota BMW Citroen Nissan	Fiat
	5 - 10%		Peugeot	VW/Audi	Renault
	10% plus	Rover Ford	Vauxhall		
Growth 1991-1996: % change in market share					
<div>Fall of more than 10%</div> <div>Minus 10% to plus 10%</div> <div>10% - 50% growth</div> <div>50% plus growth</div>					

Source: SMMT

Figure 7.20 Registrations of new cars in the UK by manufacturer

Market share/%	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Audi Volkswagen (VAG)	5.80	5.37	5.45	5.55	5.76	5.56	5.22	4.72	5.10	5.51	7.13
BMW	1.91	1.86	1.93	2.13	2.14	2.43	2.55	2.30	2.38	2.83	2.81
Citroen	1.83	2.29	3.02	2.89	3.03	3.36	4.04	4.54	4.42	4.12	3.78
Fiat	3.28	3.41	3.39	3.05	2.74	2.18	1.95	2.41	3.07	3.64	4.24
Ford	27.38	28.81	26.35	26.45	25.25	24.24	22.17	21.46	21.91	21.11	19.60
GM/Vauxhall	15.11	13.45	13.70	15.21	16.08	15.62	16.70	17.09	16.25	15.12	14.02
Honda	1.09	1.23	1.21	1.17	1.58	1.77	1.68	1.74	2.00	2.35	2.47
Hyundai	0.40	0.45	0.51	0.37	0.35	0.50	0.59	0.52	0.64	0.72	0.94
Jaguar	0.40	0.55	0.65	0.62	0.53	0.36	0.35	0.35	0.35	0.45	0.41
Mercedes	1.06	1.08	1.08	1.23	1.32	1.30	1.41	1.19	1.53	1.68	1.77
Nissan	5.84	5.67	6.08	6.02	5.32	4.03	4.66	5.02	4.81	4.73	4.61
Peugeot/Talbot	4.60	5.03	5.72	6.04	6.16	7.26	7.78	8.02	7.67	7.37	7.57
Renault	3.68	3.91	3.86	3.83	3.36	3.99	4.59	5.24	5.90	6.19	6.54
Rover	15.80	14.99	15.01	13.57	14.01	14.40	13.51	13.38	12.83	12.34	10.94
Saab	0.55	0.52	0.48	0.53	0.59	0.58	0.62	0.51	0.49	0.59	0.73
Toyota	1.90	1.90	1.80	1.84	2.12	2.59	2.65	2.93	2.72	2.80	2.99
Volvo	3.66	3.52	3.63	3.55	3.29	2.94	2.72	2.46	2.18	2.04	1.67
Others	6.11	6.41	6.64	6.32	6.72	7.40	7.41	6.12	5.75	6.41	7.78
Total market (millions)	1.88	2.01	2.22	2.30	2.01	1.59	1.59	1.78	1.91	1.95	2.03

Source: Society of Motor Manufacturers and Traders

1997 Lex Report on Motoring

8. Car buying and servicing

8. Car buying and servicing

8.1. Source of finance in car buying

Although low interest rates do not appear to have encouraged many private purchasers to buy, the number of people using credit to buy cars rose during 1996; through finance company loans (18%), bank loans (13%) and hire purchase (11%), although these figures are based on relatively small samples sizes (see figure 8.1). 43% of all cars are bought with cash, a figure which has fallen slightly since last year.

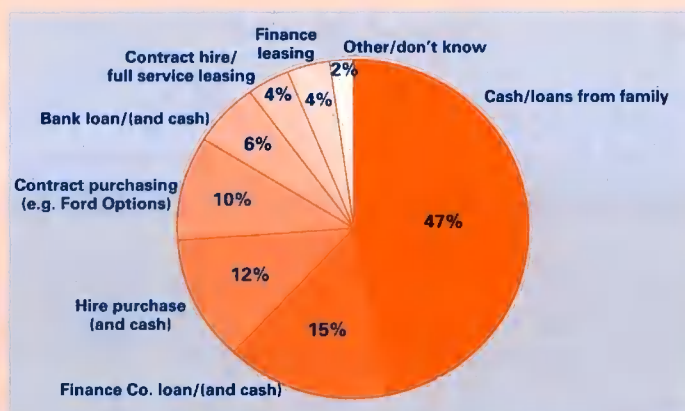
Nearly half of all new cars are also bought with cash, with a further third bought using loans. The various leasing deals (contract hire, full service leasing, finance leasing and contract purchasing) now represent 18% of new car purchases (see figure 8.2).

Figure 8.1 **Source of finance - all cars**

%	1990	1991	1992	1993	1994	1995	1996
Cash/loans from family	44	45	47	45	47	50	43
Finance Co. loan/(and cash)	15	16	19	16	16	13	18
Bank loan/(and cash)	12	15	12	11	9	7	13
Hire purchase/(and cash)	11	11	7	20	9	10	11
Contract purchasing (e.g. Ford Options)	n/a	n/a	n/a	n/a	3	2	4
Finance leasing	3	1	2	2	3	2	2
Contract hire/full service leasing	1	2	2	3	2	1	2
Building society loan/(and cash)	1	3	3	2	2	2	1
Other	3	3	4	4	4	5	3
Don't know/refused	10	4	4	7	5	8	1

Base: All responsible for buying a new car or second hand car at a dealer in the last two years
Source: Lex Report on Motoring/MORI

Figure 8.2 **Source of finance - new cars**



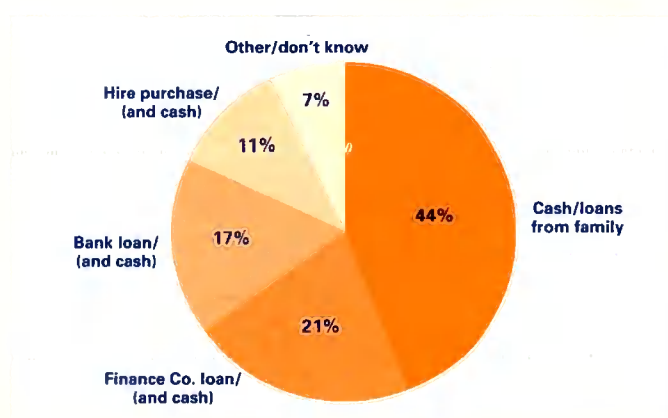
Base: All responsible for buying a new car from a dealership in the last two years (149)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

The use of credit to buy cars is more common in the used car market, with more people using loans (49%) than purely cash (see figure 8.3).

The source of finance for used cars varies by where the car was bought. It is more common for cars bought through a franchised dealer to be bought using finance company loans (24%) or hire purchase (18%). This reflects the finance packages offered at franchised car dealers and that a higher proportion of these cars are of higher value (see figure 8.4). Those bought through non-franchised dealers tend to be bought with cash (47%) or bank loans (20%).

Figure 8.3 **Source of finance – used cars**



Base: All responsible for buying a used car at a dealer in the last two years (1997)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 8.4 **Source of finance for used cars at franchised and non-franchised dealers**

	All	Car bought used Franchise dealer	Car bought used Non-Franchise dealer
	%	%	%
Cash/loans from family	46	43	47
Finance Co. loan/(and cash)	21	24	18
Bank loan/(and cash)	16	12	20
Hire purchase/(and cash)	11	18	5
Other/don't know	6	4	10

Base: All responsible for buying a used car at a dealer in the last two years (1997)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

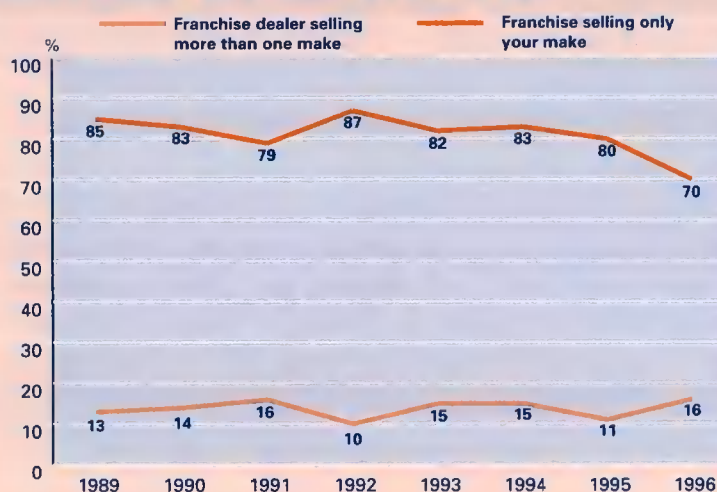
8. Car buying and servicing

8.2. Source of purchase

Of the 1.7 million new cars bought in 1996 (excluding cars bought directly by companies), around 0.3 million were bought through operations selling two or more makes. The proportion of new cars sold through solus franchise dealers has fallen from 87% in 1992 to 70% in 1996 (see figure 8.5).

Of the 6.1 million estimate of the used car market, over half were sold through the retail trade, with new car dealers accounting for over

Figure 8.5 **Source of purchase – new cars**



Base: Bought new in the last two years
Source: Lex Report on Motoring/MORI

Figure 8.6 **Source of purchase - gross numbers sold**

Annual average over last two years/millions	
New cars*	1.7m
Which of these did you buy from?	
Franchise selling only your make	1.4m
Franchise dealer selling more than one make/Other	0.3m
Used cars	6.1m
Which of these did you buy your car from?	
Used car dealer	1.5m
Private deal	1.4m
Friend/relative	1.1m
Franchise dealer for your make	1.0m
Other new car dealer	0.6m
Car auction	0.1m
Gift/other	0.3m

Base: All who bought cars in last two years (525)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI
* This excludes cars bought directly by companies

8. Car buying and servicing

half of that figure. One in five transactions in the used car market were between friends and relatives (see figure 8.6).

Six in ten of the used cars sold by franchised dealers are under three years old (they sell 53% of all used cars under three years old) (see figure 8.7). Used car dealers sell more older cars, whilst nearly three quarters of cars sold privately are over six years old.

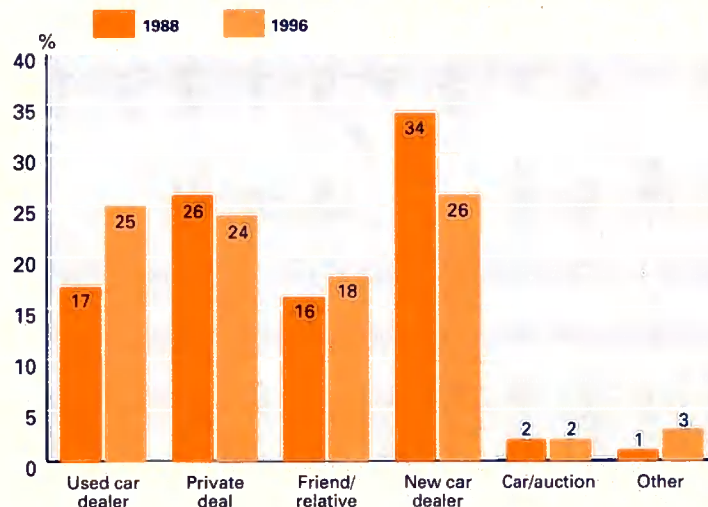
Over the past eight years of Lex Report surveys, the proportion of used cars sold through new car dealers has fallen and the proportion of cars sold through used-car dealers has risen from 17% to 25% (see figure 8.8).

Figure 8.7 **Source of purchase - used cars by age of car when bought**

	Franchise dealer	Used car outlet	Friend/Private
	%	%	%
Up to 3 years	60	19	9
3-6 years	25	33	17
Over 6 years	15	48	73

Base: All responsible for buying a second hand car in last two years (402)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 8.8 **Source of purchase - used cars**



Base: Bought used in the last two years
Source: Lex Report on Motoring/MORI

8. Car buying and servicing

8.3 Reasons for choosing dealership

The most common reason for choosing a dealership is the value they offer (see figure 8.9). Service levels are important, however, particularly for new car buyers. A third of new car buyers said they chose a dealership because of customer service and a third because of after sales care.

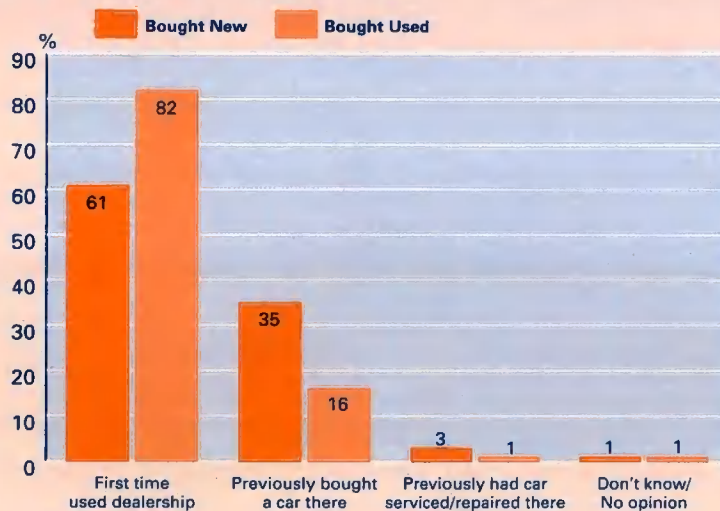
The importance of service in the new car market may explain why new car buyers are more loyal, both to dealers and the marque (see section 7.9 for details on marque loyalty). 35% of new car buyers had bought their previous car from the same dealer, compared to 16% of used car buyers (see figure 8.10).

Figure 8.9 **Considerations in choosing dealership**

	New car buyers	Used car buyers
<i>Top 7 responses</i>	%	%
Offers good/best deal or value	58	49
Good customer service	32	25
Good after sales care/service	36	22
Nearest selling marque I wanted	28	20
Knowledgeable sales people	22	15
Wide range of cars	15	20
Bought last car there	19	8

Base: All who bought a car from a dealership in last two years (350)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 8.10 **Loyalty to dealership**



Base: All bought car from dealer in last two years (350)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

8.4. The purchase cost of new and used cars

Between 1992 and 1996 the average price paid for privately owned new cars rose by 24% and used cars by a third (see figure 8.11). This was almost entirely accounted for by changes in the specification of cars bought. Independent assessments, based on a constant basket of cars, show that in real terms used car prices fell slightly and new car prices rose slightly.

Older people tend to spend more on their cars, which are on average newer (see figure 8.12). Used cars bought through own-make franchised dealers are on average two-thirds more expensive than those bought through a used-car dealer, reflecting the age-profile of the cars bought.

Figure 8.11 The purchase cost of car driven most often

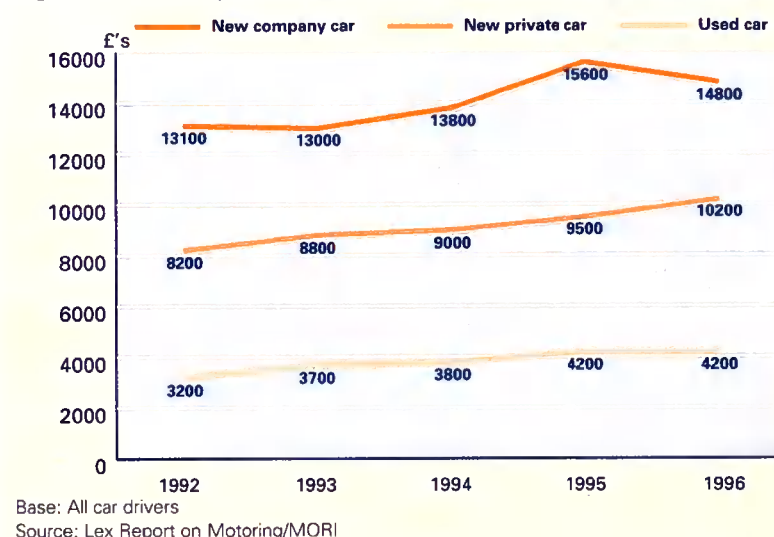


Figure 8.12 The purchase cost by demographics and source of purchase

		1992	1996
		£'s	£'s
Age of driver	17-34	4000	4800
	35-54	5000	6800
	55+	5600	7600
Sex of driver	Male	5700	6800
	Female	5300	5300
Source of purchase (used cars)	Private individual did not know	2700	2800
	Friend/relative	2500	2500
	Dealer, only used cars	4800	4900
	Franchised dealer your make	8600	8200
	Franchised dealer another make	6400	6600
	Auction*	3400	3000

Base: All car drivers

Source: Lex Report on Motoring/MORI

* private buyers only (excludes higher priced trade purchases)

8. Car buying and servicing

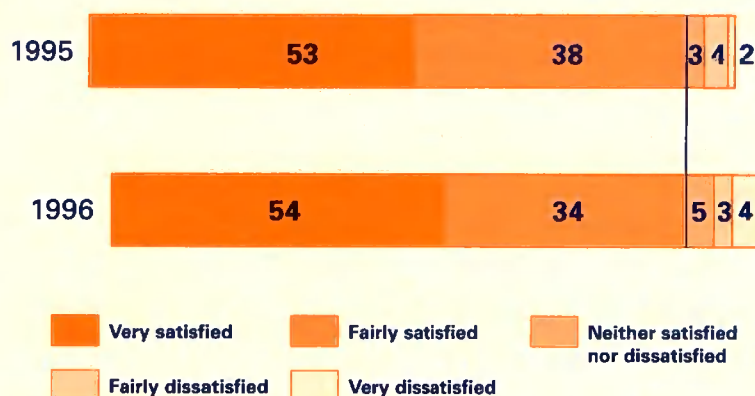
8.5. Consumer satisfaction with car buying

Consumer satisfaction with dealers has remained broadly static since last year, with 55% "very satisfied" and 4% "very dissatisfied" (see figure 8.13).

Satisfaction is much higher for new car buyers and significantly lower at used car dealers (see figure 8.14), confirming the traditional view that some used car dealers provide less professional service.

When asked about preferred times to visit a dealership, it was found that priorities have not changed since the last time the question was asked in 1988, despite changes in the broader shopping environment and greater Sunday opening in particular. The most popular times remain week-day evenings and Saturday and Sunday afternoons.

Figure 8.13 **Level of satisfaction with car dealers**



Base: All who bought last car through dealer (don't knows excluded)
Source: Lex Report on Motoring/MORI

Figure 8.14 **Level of satisfaction with car dealers by demographic group and source of purchase**

% Horizontal		% very satisfied	% dissatisfied
Age of driver	17-34	43	8
	35-54	55	6
	55+	66	8
Sex of driver	Male	51	8
	Female	60	6
New cars		65	1
Source of purchase (used cars)	Dealer, only used cars	34	10
	Franchised dealer selling just your make	59	5
	Franchised dealer selling other make	48	0

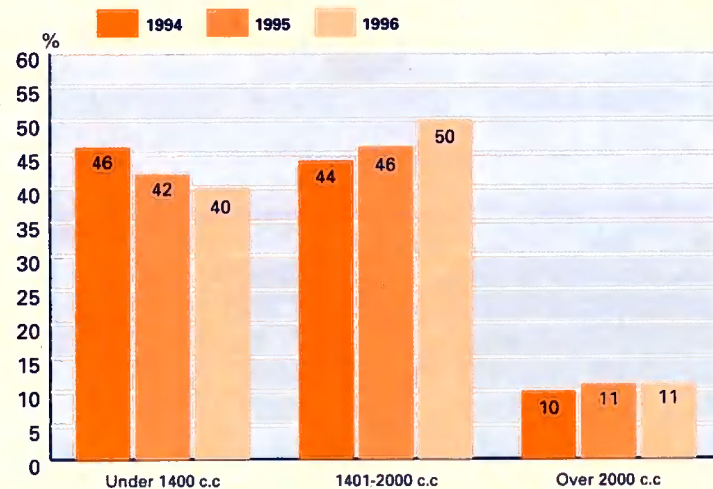
Base: All who bought last car through dealer (350)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8.6. The engine size of cars

There has been a slow rise in the engine size of cars over the past two years according to the Lex Report survey. In 1994, 46% of cars were under 1400cc. This had fallen to 40% in 1996. The rise has been in the number of mid-engine cars, rather than engines over two litres (see figure 8.15).

Older people, who tend to spend more on cars and have newer cars, buy smaller engined cars - 44% have cars under 1400cc. More company car drivers have larger engined cars (over two litres), which correlates with their higher mileage and social class (see figure 8.16).

Figure 8.15 Engine size of cars



Base: All cars (don't knows excluded)
Source: Lex Report on Motoring/MORI

Figure 8.16 Engine size by demographic group

%	Age of driver			Men	Women	Company	Private New	Private Used
	17-34	35-54	55+					
Under 1400 c.c.	39	38	44	38	42	25	45	42
1401-2000 c.c.	49	50	49	52	46	50	48	50
Over 2000 c.c.	12	12	7	10	12	25	8	8

Base: All cars (don't knows excluded) (1609)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

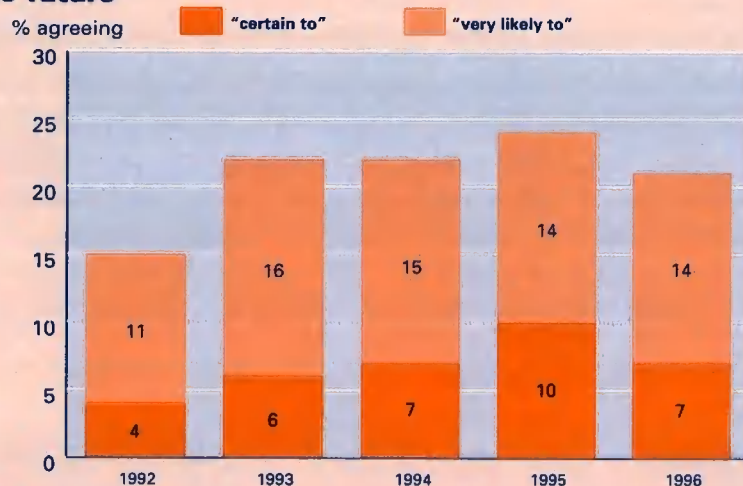
8. Car buying and servicing

8.7. Diesel powered engines

The diesel has had a poor environmental press recently, having had an ambivalent environmental assessment before this. There has been a fall in the number of people saying they are "certain" to consider a diesel car for their next purchase, to 7% from 10% last year (see figure 8.17). This reflects new car sales, where the proportion that are diesels fell from 21% in 1995 to approximately 18% in 1996.

Company car drivers are more likely to consider a diesel next time. The group most likely to consider diesels are those doing high mileage and the 7% of drivers who already have one (see figure 8.18).

Figure 8.17 **Trend in consideration of buying a diesel car in the future**



Base: All car drivers

Source: Lex Report on Motoring/MORI

Figure 8.18 **Likelihood of buying a diesel car in the future by demographic group and whether new or used**

% Horizontal		Certain to	Very likely to
All drivers		7	14
Age of driver	17-34	7	17
	35-54	7	14
	55+	7	8
Sex of driver	Male	7	15
	Female	7	12
New versus used	Company	11	12
	New private	7	9
	Used private	6	16
Other	Drive over 20,000 miles per year	12	19
	Diesel car drivers	35	28

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

8.8. Service locations

There has been little change in where people get their cars serviced since the first Lex Report survey in 1988 (see figure 8.19). There has been a slight rise in the use of dealers/workshops (up 5%) and a fall in the number of people doing the work themselves (down 6%). There has also been a rise in the use of mobile service units and service centres, but they still only represent 5% of the market.

Franchised dealers service 68% of all cars owned from new – representing 59% of their service business (see figure 8.20). Non-franchised garages and DIY mechanics mostly service cars over six years old.

Figure 8.19 **Service location: where cars are serviced**

	1988	1992	1996
	%	%	%
Main dealer	31	29	34
Main dealer for different make	3	3	3
Garage/workshop	29	34	31
Do it yourself	23	22	17
Friend/acquaintance	15	18	17
Mobile service unit	n/a	3	3
Service centre	1	3	2
Other	1	1	2

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

Base: All with responsibility for getting car serviced

Source: Lex Report on Motoring/MORI

Figure 8.20 **Service location: proportion of all cars serviced by each location**

		Franchise dealer	Non-franchised garage	Friend/DIY
Age of car	Under 3 years	60	8	9
	3-6 years	29	30	17
	Over 6 years	11	62	73
New versus used	Owned from new	59	11	8
	Bought used	41	89	92

Base: All with responsibility for getting car serviced (954)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

8.9. Frequency of service and repair

Service frequency fell by 13% between 1992 and 1996, whilst the average number of repairs stayed constant at 0.9 occasions per year (see figure 8.21). This fall in service frequency occurred despite improving economic conditions. The fall is largest for new cars, reflecting quality improvements and changes in recommended service intervals. In addition cars now require less time to service when they have to go in for scheduled maintenance.

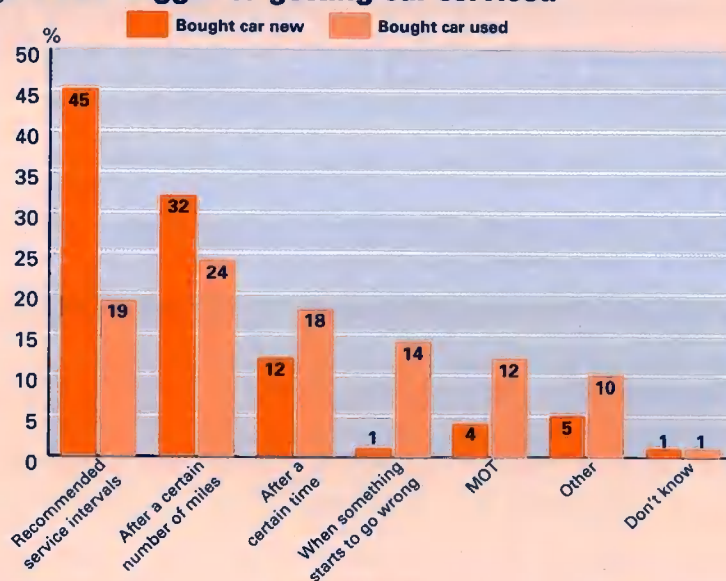
The trigger to getting the car serviced is recommended service intervals or a fixed number of miles for most new car owners, but it is more likely to be a reaction to something going wrong or because of the MOT for used car owners (see figure 8.22).

Figure 8.21 Frequency of servicing and repair

		Average no. of services		Average no. of repairs	
		1992	1996	1992	1996
All		1.6	1.4	0.9	0.9
New		1.6	1.4	0.6	0.5
Used		1.5	1.4	1.0	1.0
Age of car	0-3 years	1.5	1.4	0.5	0.5
	3-6 years	1.5	1.4	0.8	0.6
	Over 6 years	1.6	1.4	1.3	1.2
Miles driven/year	0-6000	1.4	1.2	0.9	0.8
	6001-20,000	1.5	1.4	0.9	0.8
	20,000+	2.4	2.4	1.0	1.0

Base: All those with responsibility for getting car serviced
Source: Lex Report on Motoring/MORI

Figure 8.22 Trigger to getting car serviced



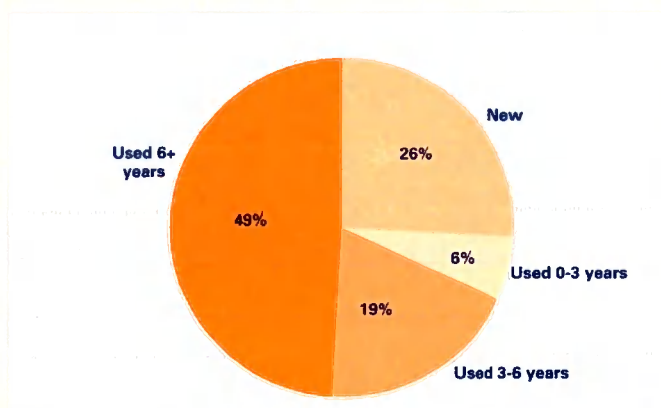
Base: All those with responsibility for getting car serviced (954)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

In total there are around 58 million repair and service occasions for Britain's cars each year. Of this 26% are for new cars and half for used cars over 6 years old (see figure 8.23).

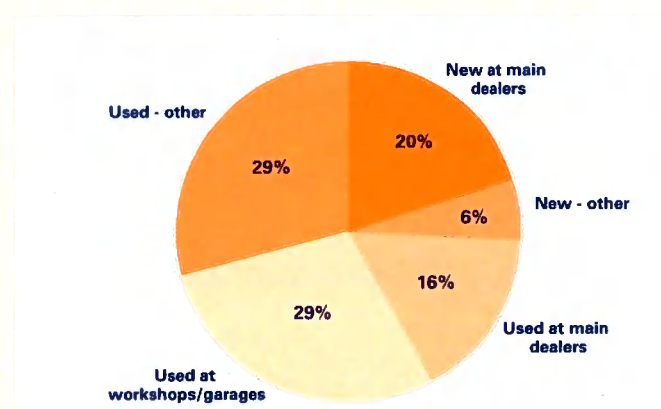
New cars are more likely to get their car serviced at main dealers. In total main dealers account for just over a third of the service and repair market, split roughly half and half between new and used cars (see figure 8.24). Garages and workshops account for just over a third of the 58 million repair and service occasions and most of these are for used cars.

Figure 8.23 **Breakdown of the service and repair market (1)**



Base: All those with responsibility for getting car serviced (954)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 8.24 **Breakdown of the service and repair market (2)**



Base: All those with responsibility for getting car serviced (954)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

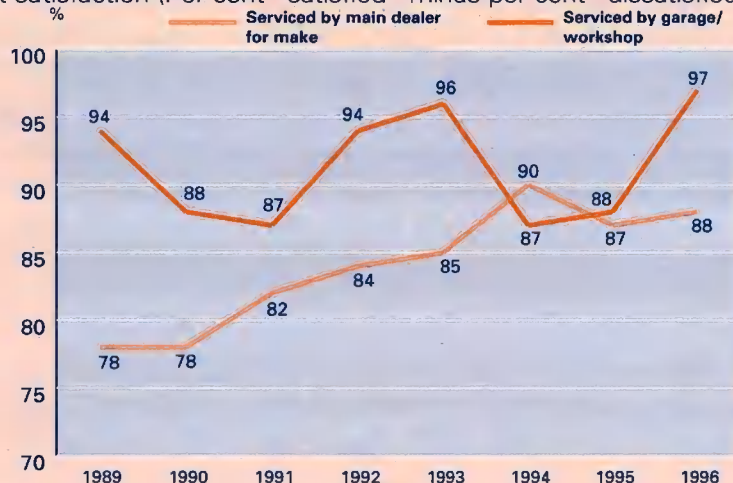
8.10. Satisfaction with service

Net satisfaction with car servicing rose this year, with 88% satisfaction for those who went to their main dealer and 97% for those who went to a garage/workshop (see figure 8.25).

With such high levels of overall satisfaction the important factors are those "very satisfied", who are likely to remain loyal and those "unsatisfied", who will be disloyal and tell others about their experience. 60% are very satisfied and just 2% dissatisfied on average (see figure 8.26). Older people tend to be more satisfied, as do women and private car owners. The most critical are company car drivers, despite the company paying in many cases.

Figure 8.25 **Satisfaction with servicing**

Net satisfaction (Per cent "satisfied" minus per cent "dissatisfied")



Base: All who get car serviced by a dealer/garage/service centre
Source: Lex Report on Motoring/MORI
(Repercentaged excluding those who answered 'don't know')

Figure 8.26 **Satisfaction with servicing by demographic group and whether new or used**

% Horizontal		% very satisfied	% dissatisfied
All drivers		60	2
Age of driver	17-34	45	3
	35-54	58	1
	55+	76	3
Sex of driver	Male	57	2
	Female	65	3
New versus used	Company	45	6
	New private	67	3
	Used private	60	1

Base: All who get car serviced by a dealer/garage/service centre (710)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

8. Car buying and servicing

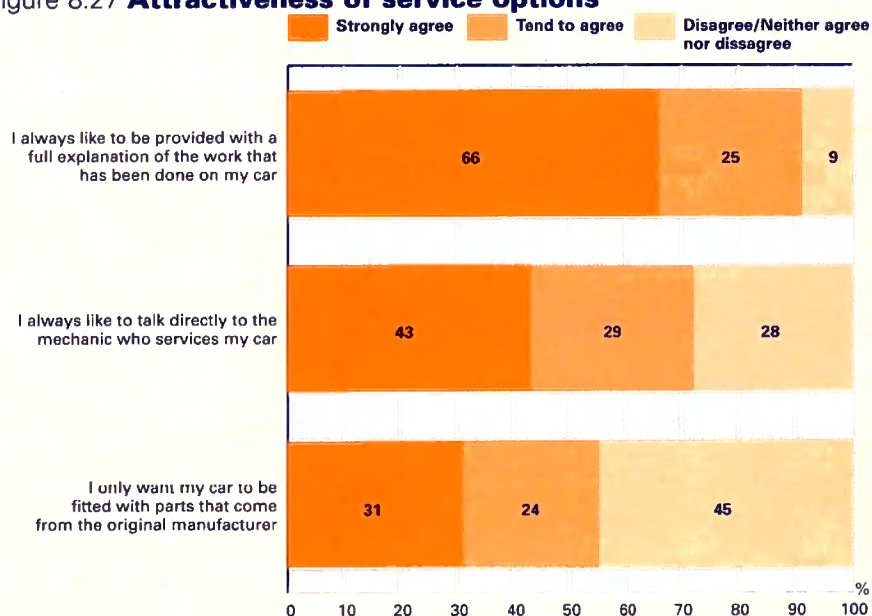
Respondents responsible for getting their car serviced were asked how attractive they would find various alternative service options.

The most attractive options are those where there is direct dialogue between the service provider and the customer. Two thirds of people want a full explanation of the work done and four in ten would like to talk directly to the mechanic (see figure 8.27).

Less than a third strongly agreed they only wanted original parts fitted to their car.

Whilst only one in five found a while-you-wait service for minor tasks "very attractive", nearly six in ten attached some merit to the idea (see figure 8.28).

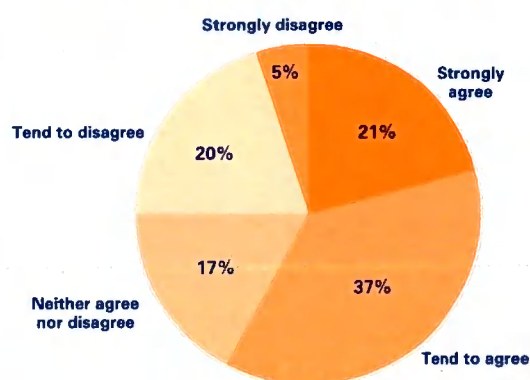
Figure 8.27 **Attractiveness of service options**



Base: All those with responsibility for getting car serviced (954)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 8.28 **Attractiveness of while-you-wait servicing**

"I would prefer to use a garage or service centre that conducted minor maintenance tasks and repairs while I wait"



Base: All those with responsibility for getting car serviced (954)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

1997 Lex Report on Motoring

9. Driver and car profiles

9. Driver and car profiles

9.1. Profile of car drivers

The age and sex profile of Britain's car drivers has remained steady since the 1988 Lex Report survey. The main demographic change has been the proportion of drivers of higher social class (see figure 9.1). ABC1's represented 52% of car drivers in 1988, rising to 60% in 1995, reflecting rising income polarisation.

Younger women are now nearly as likely as younger men to have a driving licence (see figure 9.2). For example, 90% of men aged 30-39 have licences, compared to 74% of women. In 1975/76 the figures were 85% and 49% respectively. Women drivers will grow in number as these proportions increase further.

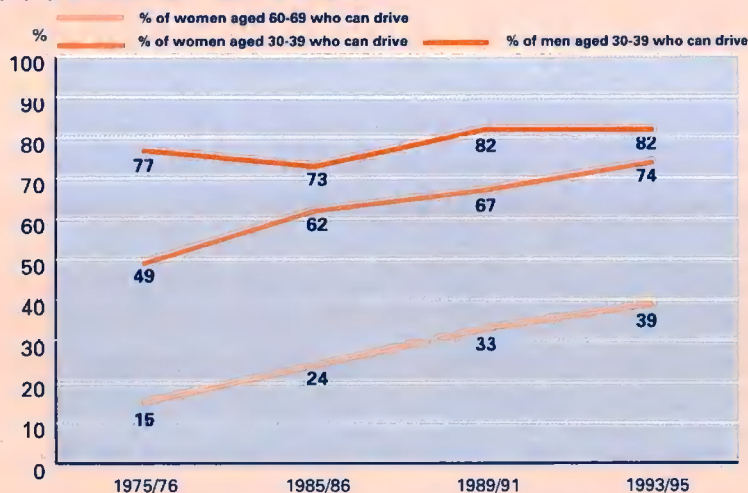
Figure 9.1 **Profile of Britain's car drivers**

%		Car drivers 1988	Car drivers 1995/96	General Public (GB) 1996
Sex	Male	58	59	48
	Female	42	41	52
Age	17-34	37	38	35
	35-54	38	39	33
	55+	25	23	32
Class	AB	24	29	21
	C1	28	31	27
	C2	31	24	23
	DE	17	16	29

Base: All car drivers

Source: Lex Report on Motoring/MORI

Figure 9.2 **Women car drivers**



Source: National Travel Surveys

9.2. Profile of new car drivers

The age profile of new car buyers has become marginally younger since the first Lex Report survey in 1988. At that time 19% of buyers were under 35 years old compared to 22% in 1996 (see figure 9.3). Buyers over 55 years old have fallen from 41% of the total in the 1988 survey to 36% in the latest survey.

Women represent a third of new car buyers, a figure which has changed little since the first survey in 1988. The proportion of women driving cars bought from new has risen from a low of 25% in 1994 to 30% in 1996 (see figure 9.4).

Figure 9.3 **Profile of new car buyers***

		1988	1996	1996
		%	%	millions
Age	17-24	3	3	0.05
	25-34	16	19	0.35
	35-54	40	41	0.70
	55-64	22	18	0.35
	65+	19	18	0.25
Sex	Male	69	66	1.10
	Female	31	34	0.60
Total		100	100	1.70

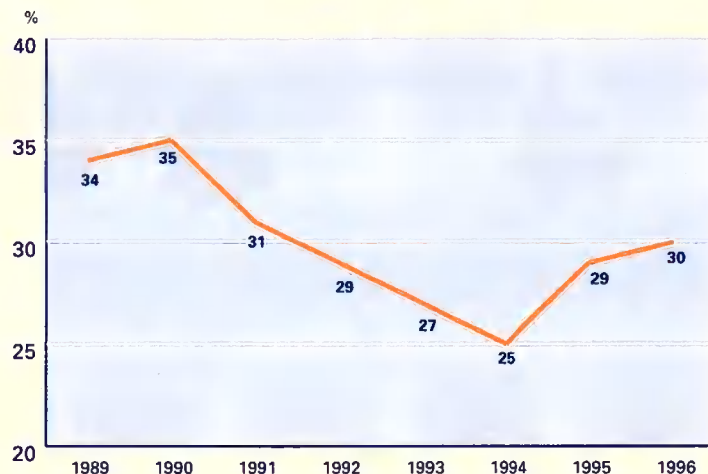
* excludes cars bought directly by companies

Base: All recently bought new cars

Source: Lex Report on Motoring/MORI

Figure 9.4 **Women and the new car market**

% of women whose car driven most often was bought from new



Base: Women drivers

Source: Lex Report on Motoring/MORI

9. Driver and car profiles

9.3. Profile of used car buyers

The age profile of used car buyers has remained broadly static between the first Lex Report survey in 1988 and the latest survey (see figure 9.5). 48% of used cars are bought by the under 35's, compared to 22% of new cars.

Women represent a third of used car buyers, a proportion that has changed little over the past eight years, despite women now representing nearly half of Britain's workforce and women's pay having risen to 77% of the equivalent pay for men. 70% of women motorists drive cars that were second-hand when they were bought (see figure 9.6).

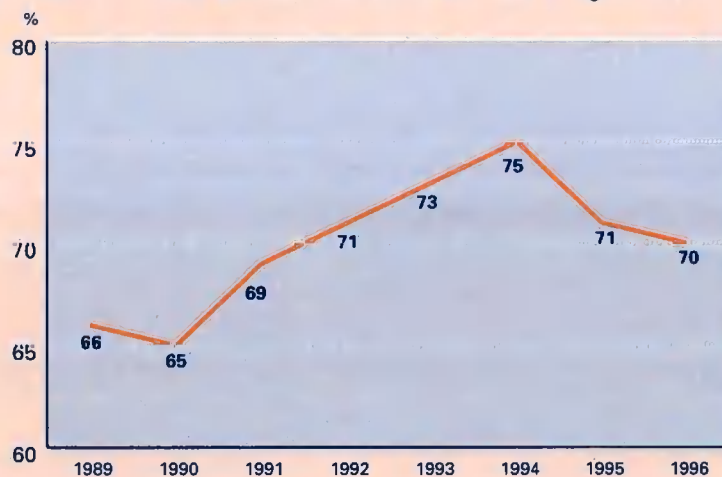
Figure 9.5 **Profile of used car buyers**

		1988	1996	1996
		%	%	millions
Age	17-24	14	15	1.0
	25-34	32	33	2.2
	35-54	36	38	2.2
	55-64	12	9	0.5
	65+	7	5	0.2
Sex	Male	67	69	4.4
	Female	33	31	1.7
Total		100	100	6.1

Base: All recently bought used cars
Source: Lex Report on Motoring/MORI

Figure 9.6 **Women and the used car market**

% of women whose car driven most often was bought used



Base: Women Drivers
Source: Lex Report on Motoring/MORI

9.4. Profile of company car drivers

Nine in ten company car drivers are aged between 25 and 55 years old and 72% of them are men (see figure 9.7). The majority of these are aged between 35 and 54.

The company car is becoming a more essential tool of work, according to the results from the last four Lex Report surveys (see figure 9.8). In 1993, 69% of company car drivers said their car was essential for their job. This had risen to 77% of company car drivers in the latest survey. Just one in ten company car drivers say their company car is purely part of their remuneration package.

More details on the company car market will be provided in a second Lex report later in the year.

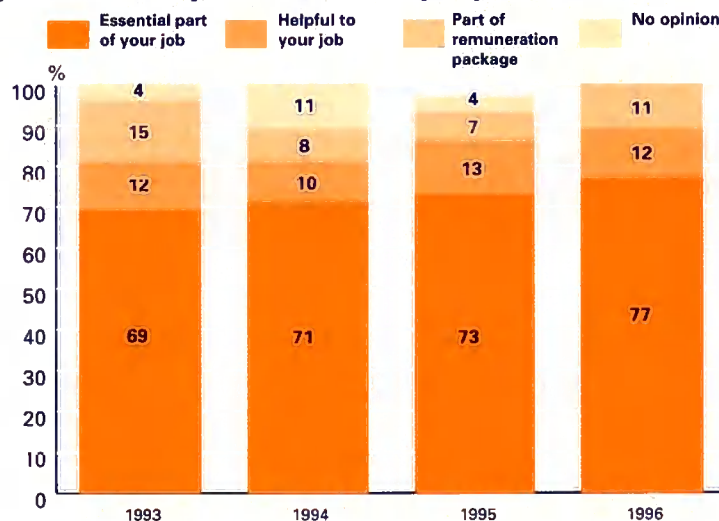
Figure 9.7 **Profile of company car drivers**

		1996
		%
Age	17-24	3
	25-34	38
	35-54	52
	55-64	5
	65+	1
Sex	Male	72
	Female	28

Base: All who drive company cars (310)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.8 **The importance of company cars in the workplace**



Base: All with company car

Source: Lex Report on Motoring/MORI

9. Driver and car profiles

9.5. Profile of Britain's cars

85% of the cars on Britain's roads are privately owned and 69% of cars bought from new are privately owned (see figure 9.9). 6% of the used car market are company owned cars and 10% of used cars are under three years old.

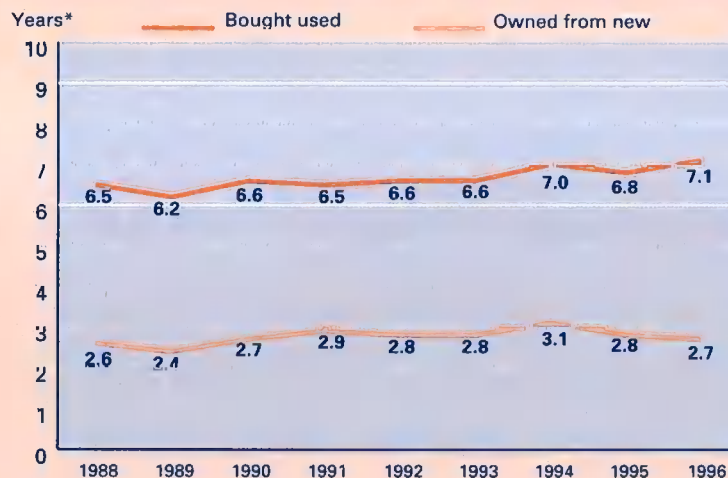
The average age of cars bought new by their current owners has fallen in the last two years, according to the results from the Lex Report survey, whilst the average age of cars bought used has risen slightly (see figure 9.10).

Figure 9.9 **Profile of Britain's cars - new versus used**

		All cars	Bought new (Car drive most often)	Bought used (Car drive most often)
		%	%	%
Car driven most	Bought new	30	100	0
	Bought used	70	0	100
Engine size	Up to 1400cc	39	36	40
	1401-2000cc	48	51	51
	Over 2000cc	11	12	8
Type of ownership	Bought privately	85	69	95
	Provided by an employer	9	22	2
	Business expense	4	8	4
Age of car	0-3 years	27	70	10
	3-6 years	24	18	28
	Over 6 years	47	12	62

This table gives overall information about all cars in the household (up to maximum of 3 per household) (1853) and details of the respondent's main car (1209)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.10 **The changing age of the car parc - new versus used**



*Mean age of car driven most often
Base: All car drivers
Source: Lex Report on Motoring/MORI

9. Driver and car profiles

70% of company cars were bought from new, but this varies between company provided cars, where 84% are bought new and cars bought as a business expense where less than half are bought new (see figure 9.11).

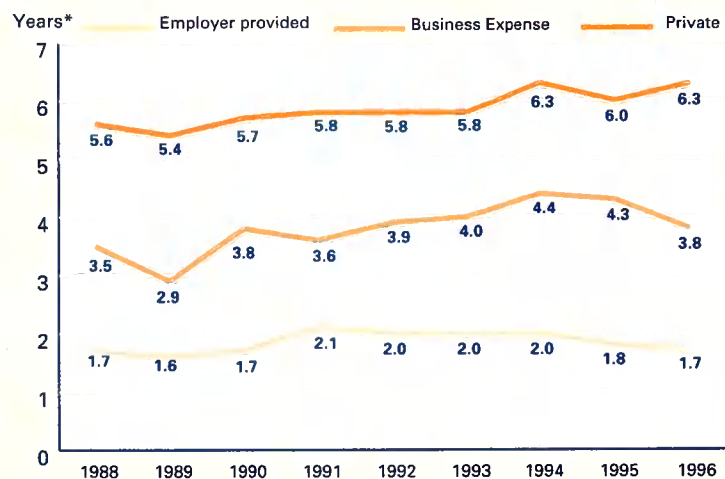
The age of privately owned cars has risen from 5.4 years in 1989 to 6.3 years in this year's survey (see figure 9.12). Employer provided company cars are on average 1.7 years old. This has fallen in recent years following a rise during the recession. The average age of business expense cars is also falling, but they are still over twice as old as employer provided cars.

Figure 9.11 **Profile of Britain's cars - private versus company**

		Private	All company cars	Company cars – Provided by an employer	Company cars – Business expense
		%	%	%	%
Car driven most	Bought new	24	70	84	47
	Bought used	76	29	14	53
Engine size	Up to 1400cc	43	11	7	16
	1401-2000cc	50	63	72	48
	Over 2000cc	6	25	19	36
Age of car	0-3 years	22	70	85	48
	3-6 years	26	18	13	26
	Over 6 years	52	11	2	27

This table gives details of the respondent's main car (1209)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.12 **The changing age of the car parc**
– private versus company



* Mean age of car driven most often
Base: All car drivers
Source: Lex Report on Motoring/MORI

9. Driver and car profiles

9.6. Profile of truck drivers

Truck drivers are almost exclusively men. 99% of our truck driver sample were men and over half were aged between 35 and 54 years old (see figure 9.13).

A third of the sample of truck drivers worked just on long-distance work, a quarter just did local work, whilst four in ten did a mix of local and long-distance work (see figure 9.14). Department of Transport data shows that in 1995 the average length of haul for trucks over 3.5 tonnes was 45 miles for rigid vehicles and 137 miles for articulated trucks.

98% of the sample worked full-time. 12% were self-employed.

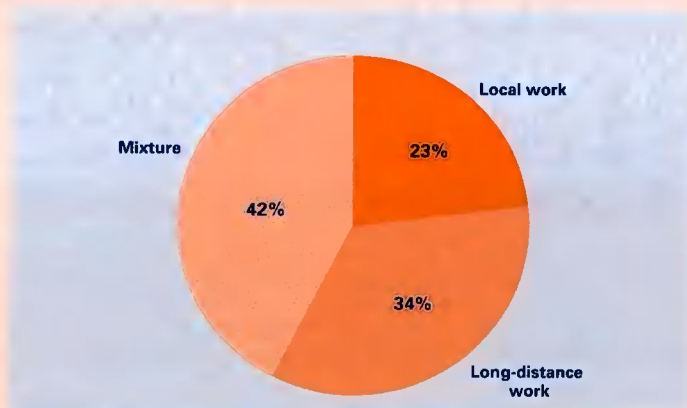
Figure 9.13 **Profile of truck drivers (%)**

Age	17-24	3
	25-34	28
	35-54	55
	55-64	13
	65+	0

Base: All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.14 **Type of work undertaken**



Base: All truck drivers (163)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

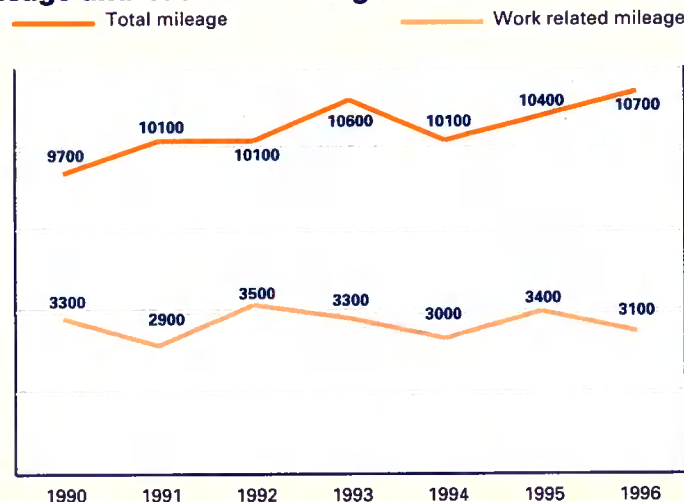
9.7 Mileage of different driver groups

Overall mileage per driver per annum has risen by 1,000 miles since the Lex Report survey in 1990, to 10,700 miles per annum in this year's survey. This figure is very close to official government estimates. Average mileage in the course of work appears to have fallen slightly over the past year to 3,100 miles (see figure 9.15).

Men drive 40% more miles than women and nearly twice as many work related miles (see figure 9.16). Older people drive a lot less than other groups.

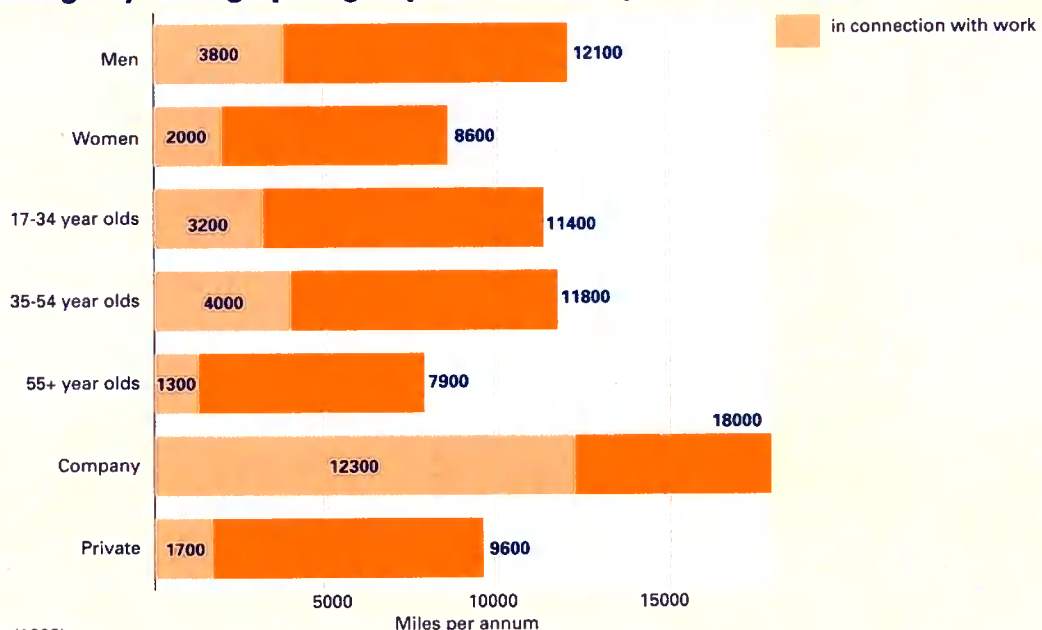
Company car drivers cover nearly twice as many miles as private drivers, most of which are related to work.

Figure 9.15 Overall mileage and business mileage



Base: All car drivers
Source: Lex Report on Motoring/MORI

Figure 9.16 Mileage by demographic group and whether private or company owned



Base: All car drivers (1209)
Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

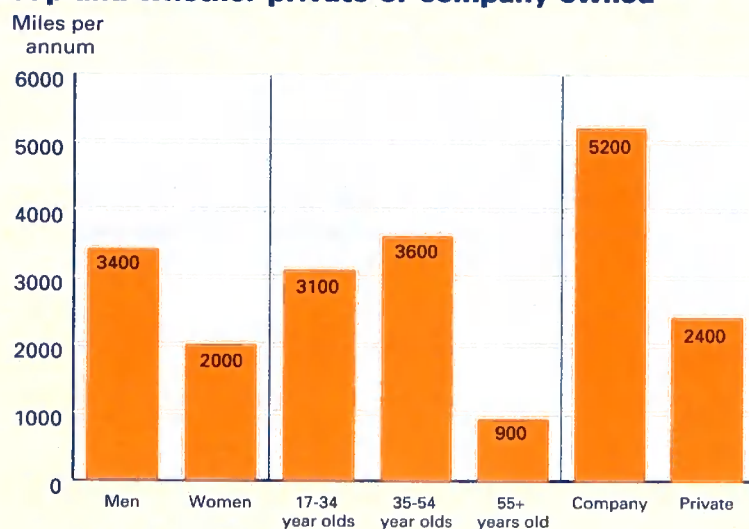
9. Driver and car profiles

9.8 Profile of commuting patterns

On average 79% of those who work commute by car (the same proportions as in the 1992 Lex Report survey), driving 4,800 miles per year or 20 miles per working day. On average men say they commute 70% more than women and company car drivers over twice as much as private car drivers, reflecting their economic status. Unsurprisingly the over 55's on average commute very little (see figure 9.17).

The reasons people give for commuting are because it is quicker (55%), because they need the car at work (36%) or because it is more

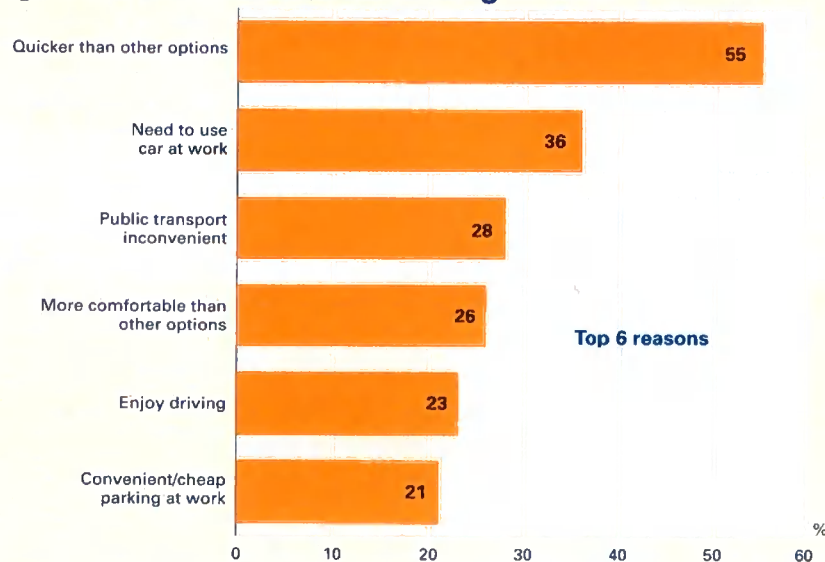
Figure 9.17 **Average commuting mileage by demographic group and whether private or company owned**



Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.18 **Main reasons for driving to work**



Base: All who drive to and from work (730)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

9. Driver and car profiles

convenient or comfortable than public transport (see figure 9.18). Only 12% said it was because it was cheaper than other options.

Most people work in large towns/city centres or on the edge of town (79%) (see figure 9.19). Even 61% of those who live in more rural areas work in large towns.

Nearly six in ten drivers who commute are provided with free parking by their employers. Most of the rest either park free on the street or pay their own parking costs (see figure 9.20).

These figures do not vary greatly with the location of the workplace, or whether cars are company provided or privately owned.

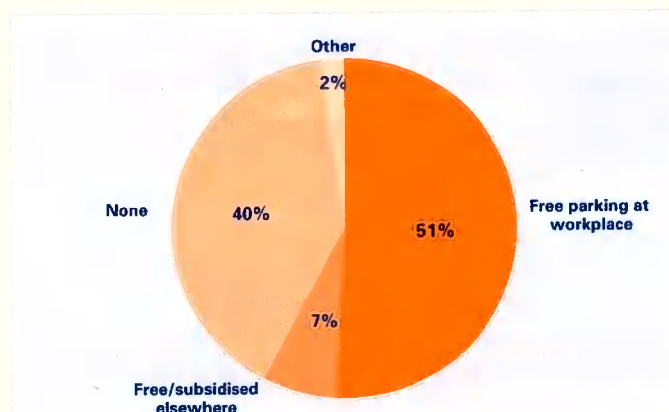
Figure 9.19 **Location of work place**

Where work....	Where live....			
	All	City/town centre	City/town suburb	Village/rural
	%	%	%	%
City/town centre	33	45	33	30
City/town suburb/industrial estate	46	40	52	31
Village/rural	16	9	12	31
Other	5	5	4	7

Base: All who drive to and from work (730)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.20 **Company provision of parking assistance**



Base: All who drive to and from work (730)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

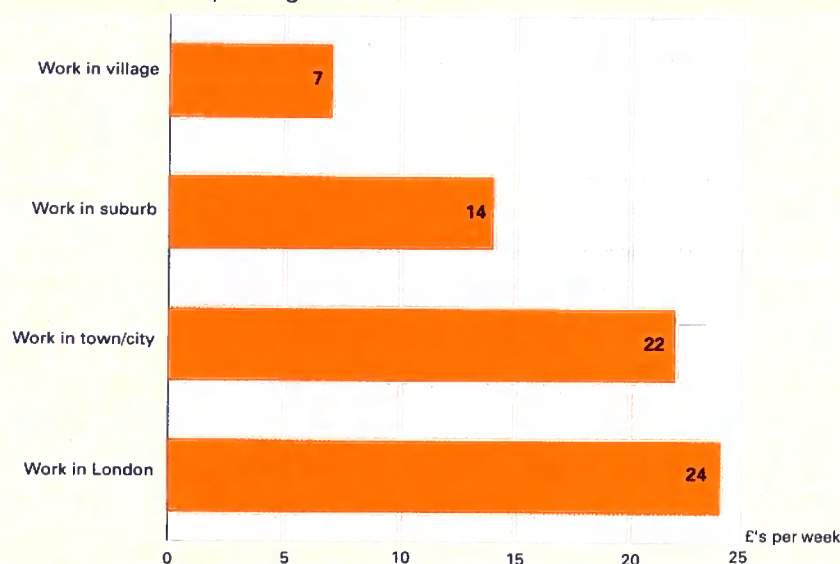
9. Driver and car profiles

Those who are currently provided with free parking at work were asked how much it would cost them if they had to pay for parking. A majority (61%) did not know, but those who did on average said it would cost them around £18 per week. Those who work in London thought it would cost them 50% more than those who work outside London. City and town centres were generally thought to be more expensive than more rural areas (see figure 9.21).

If these people with free parking had to pay in the future, two-thirds say they would still drive, with the majority of the other third saying they would use the bus or would cycle (see figure 9.22).

Figure 9.21 **The cost of parking**

Estimates of how much would have to pay if no longer had assistance with parking at work

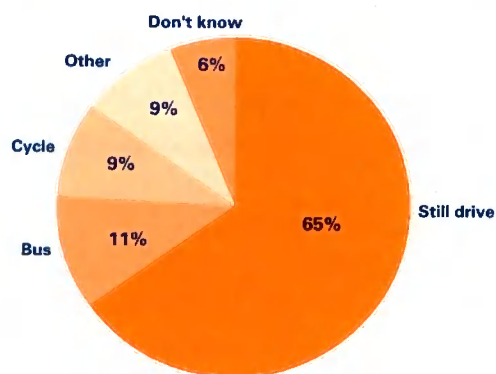


(Re-analysed excluding 'don't know's')

Base: All whose company give assistance with parking at work (444)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 9.22 **How would travel to work if had to pay for parking**



Base: All who would have to pay for parking if their company did not give assistance (181)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

1997 Lex Report on Motoring

10. Results summaries

10. Results summaries

10.1 Driver profile by region

Differences in driver profiles between the regions are in general not that significant (see figure 10.1). There are a slightly higher proportion of new cars in Midlands/East Anglia and Scotland. There are more multi-car households in London and the South-East and the Midlands/East Anglia. The Midlands/East Anglia has the highest proportion of diesels. These figures should be treated with caution because of the relatively small sample sizes, but are broadly in line with the results from last year's Lex Report survey.

The South-East of England and London account for over a third of all drivers in Britain (see figure 10.2). Scotland has 9% of all the drivers in Britain.

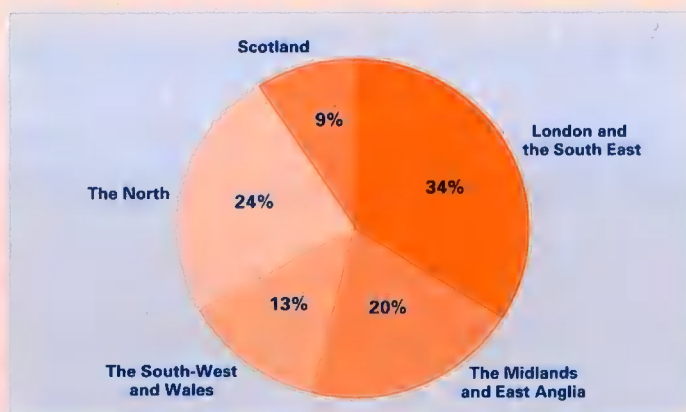
Figure 10.1 Driver profile by region

	All	London/ South-East	South-West/ Wales	Midlands/ East Anglia	North of England	Scotland
Millions of drivers	26.2	8.4	3.6	5.1	6.7	2.4
Annual mileage	10,700	10,500	11,000	11,700	10,100	10,400
Business mileage	3,300	3,100	3,700	3,500	2,700	2,400
Commuting mileage	2,800	3,000	2,600	3,400	2,400	2,100
% of drivers where car driven most often bought from new	29	29	24	31	28	37
% of regular car drivers in households with more than one car	43	49	40	48	34	39
% of drivers who are female	41	42	39	41	40	41
% of drivers that are under 25 years old	9	9	4	11	9	7
% of drivers that are over 65 years old	11	10	10	11	14	6

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 10.2 Cars on the road by region



Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

10.2 A regional summary of road-safety results

Sample sizes for each of the regions are relatively small and therefore the differences highlighted below may not be significant and representative of all drivers in the regions.

The Scotland sample stands out from the other regions as a model of good driving behaviour (see figure 10.3). They had committed less acts of road-rage, less of them had driven under the influence of drink or drugs and more of them believed that motorway speed limits should be strictly adhered to. This is perhaps the reason why less of the sample in Scotland had had an accident in the previous twelve months. The only flaw in their driving behaviour is that more of them had kissed or cuddled with their partner whilst driving than drivers in any other region.

The worst region in the sample, in terms of driving behaviour is between London and the South-East and the South-West and Wales. They both had the lowest "pass" rate on the written driving test questions and they both had equal disregard for motorway speed limits. More people in the South-West and Wales sample had committed road-rage than those in London and the South-East and a higher proportion had nodded off at the wheel. The London and South-East sample, however, had the highest proportion of drivers who admitted driving under the influence of drugs or alcohol and a higher proportion of drivers who have had accidents in the last 12 months.

The South-East and the South-West and Wales samples also had a higher proportion of people who had been victims of road-rage.

People in the Midlands and East Anglia sample had the lowest view in the country of their personal driving standards - a view not supported by the rest of the data which put them firmly in the middle of the country. They claimed to have driven more miles than any other region of the country.

Figure 10.3 **Summary of key results by regions**

	All	London/ South-East	South-West/ Wales	Midlands/ East Anglia	North of England	Scotland
<i>Driving standards</i>						
% saying general standards good/very good	30	35	21	28	30	37
% saying personal standards good/very good	74	75	73	68	76	80
% "passed" written driving test (more than one out of three right)	26	24	23	27	28	25
% had accident in the last 12 months	9	12	5	9	9	2
<i>Road-Rage</i>						
% felt like committing serious road-rage*	31	30	34	30	33	28
% committed serious road-rage*	12	10	13	14	12	7
% victims of serious road-rage*	38	42	42	35	38	23
<i>Speed limits</i>						
% thinking motorway speed limits should not be broken	58	55	55	55	59	77
<i>In car behaviour</i>						
% kissed/cuddled in last 12 months whilst driving	3	2	3	1	3	4
% nodded off at the wheel	27	24	31	29	27	20
<i>Drink and drug driving</i>						
% been in a car where driver under the influence of any alcohol/drugs	29	32	29	26	31	18
% driven a car under the influence of any alcohol/drugs	18	23	15	13	20	9

* Worse than just gesturing or verbal abuse

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

10. Results summaries

10.3. Summary of key results by demographic group

Older people are much more likely than younger people to buy their cars from new. 43% of those over 55 years old buy from new compared to 20% of under 35's (see figure 10.4). Middle-aged people, who are more likely to have children and be in households where two partners are working, are also more likely to have more than one car.

Women, on average, are better drivers than men, according to the Lex survey. They commit less road-rage, more of them believe speed limits are to be strictly adhered to, they are less likely to drive under the influence of drink or drugs and are less than half as likely to nod off at the wheel (see figure 10.5). This is perhaps why less of them have had an accident in the last 12 months, but does not explain why only 18% of women got one or less questions right on the sample of written driving test questions, compared to a third of men. In actual driving tests women also have a lower pass rate than men.

Four times as many men say they have kissed or cuddled whilst driving as women. This must lead to the conclusion that either one or both groups are lying, some women kiss a lot of men drivers or the men are kissing each other.

Young people are also significantly poorer drivers than older people according to the results from the Lex Report survey. The under 35's are more likely to commit road-rage and more likely to have had an accident recently. The middle-aged, however, along with younger drivers, have a poor record at nodding off at the wheel and driving whilst under the influence of drugs or alcohol. Many of the middle-aged also have a cavalier attitude to motorway speed limits.

Men claim to drive 40% more miles per year than women and over 55 year olds say they drive a third less than other drivers.

Figure 10.4 **Summary of key results by demographic group**

	All	Men	Women	17-34	35-54	55+
Total mileage	10,700	12,100	8,600	11,400	11,800	7,900
Business mileage	3,300	3,800	2,000	3,200	4,000	1,300
Commuting mileage	2,800	3,400	2,000	3,100	3,600	900
% of drivers where car driven most was often bought from new	30	29	30	20	31	43
% of regular car drivers in households with more than one car	42	39	46	43	51	27
% of cars that run on diesel	7	9	4	7	8	5

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Figure 10.5 **Summary of key results by demographic group**

	All	Men	Women	17-34	35-54	55+
<i>Driving standards</i>						
% saying general standards good/very good	30	35	25	27	32	34
% saying personal standards good/very good	74	70	79	70	75	78
% passed written driving test (more than one out of three right)	26	31	18	25	28	22
% had accident in the last 12 months	9	11	8	13	8	5
<i>Road-Rage</i>						
% felt like committing serious road-rage*	31	39	20	37	34	18
% committed serious road-rage*	12	15	6	17	10	5
% victims of serious road-rage *	38	39	37	42	40	30
<i>Speed limits</i>						
% thinking motorway speed limits should not be broken	58	49	70	51	57	69
<i>In car behaviour</i>						
% kissed/cuddled in last 12 months whilst driving	3	4	1	6	1	0
% nodded off at the wheel	27	34	16	31	30	15
<i>Drink and drug driving</i>						
% been in a car where driver under the influence of any alcohol/drugs	29	33	24	36	31	15
% driven a car under the influence of any alcohol/drugs	18	23	11	21	20	10

* Worse than just gesturing or verbal abuse

Base: All car drivers (1209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Appendix 1 Statistical reliability

Because only a representative sample of British drivers were interviewed by MORI, it cannot be said with certainty that the figures are precisely those that would have been obtained if every individual driver aged 17 or over had been interviewed.

However, the results can be said to be correct within certain statistical 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, including the total sample size for this survey and examples of various sub-group sample sizes, along with the percentage margins within which there is 95% certainty that the true figures will lie. 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.

	Sample size	Research findings				
		10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total drivers	1,209	+/-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

e.g.1 31% of all car drivers (sample of 1209) say they have driven when very tired in the past 12 months. There is a 95% certainty that the true figure lies between 28% and 34%.

e.g.2 37% of 17-34 year olds (sample of 460) say they have driven when very tired in the past 12 months. There is a 95% certainty that the true figure lies between 33% and 41%.

Appendix 2

Magnitude of figures being compared

For reasons similar to those given in Appendix 1, when comparing results between two areas of the country, or between two sub-groups (e.g. male versus female car drivers), one cannot be confident that differences are genuine unless they are of a certain minimum size. If the differences are larger than those given in the table below, then there can be 95% confidence that the difference is genuine.

	Size of samples being compared	Research findings				
		10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1996 compared with 1995 base	1,209-1,229	+/-2	+/-3	+/-4	+/-4	+/-4
Male versus female car drivers	758-451	+/-4	+/-5	+/-6	+/-6	+/-6
Company versus private car drivers	310-899	+/-4	+/-5	+/-6	+/-7	+/-7
Car drivers versus truck drivers	1,209-163	+/-5	+/-6	+/-7	+/-7	+/-8
Other sub groups	1,000-1,000	+/-3	+/-4	+/-4	+/-4	+/-4
	500-500	+/-4	+/-5	+/-6	+/-6	+/-6
	500-250	+/-5	+/-6	+/-7	+/-7	+/-8
	250-250	+/-5	+/-7	+/-8	+/-9	+/-9
	250-100	+/-7	+/-9	+/-11	+/-11	+/-12
	100-100	+/-8	+/-11	+/-13	+/-14	+/-14

Strictly, these margins relate to random samples where each member of the population has the same chance of selection. In practice, the accuracy of good quota samples has been found to be at least as good as random samples of this size.

It should be noted that where percentages do not add up to precisely 100%, that this could be due to the exclusion of "don't know" responses or because the question allowed for multiple answers. In some cases, it is due to rounding of figures to the nearest whole number.

Appendix 3 Lex Report on Motoring index

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Buying a car									
Best time to view	59								
Buying by virtual reality							102		
Cost of car					73	72	98	98	67
Changes in car ownership					44				
Commitment to manufacturer					89		62		59
Extra car expectations				42			37		
Features in current/next car			106		90	104	133		44
How car is chosen	46	90			86				
Improvements by manufacturer								66	
Nearly-new cars								68	
Next car purchase new/used		84	104		70	57	56		
Numbers buying a car	42	81		81	69	63	92	110	64
Part exchange				101	74				
Profile of new and used car buyers					65			111	79
Reasons for buying car now	44	82			72				
Trust of information sources		89						72	
Type of car bought							97		
Used car money back/exchange			102	90					
Used car retailing	46						87		
Who helps choose car	48								
Car ownership									
Accuracy of milometers		86							
Car bought new/used	42	81	90	80	68	63	94	110	64
Car replacement or additional	42			82					
Choice of car							51		
Diesel cars					98	110	29	106	70
Drivers in household					40				
Effect of economic climate			40	46	50		79		
Increase/decrease in car ownership						54	80		
Length of car ownership			35	36	42	58	47	85	56
Lifestyle and car ownership							49		
Likes and dislikes of car ownership								35	
Ownership by households	80	9	12	12	14	120	116	78	50
Scrappage	89	10	14	14	16	122	118	87	58
Congestion									
Delays due to congestion	70		52	54					
Congestion, problem/easing		70	84	56			26	38	
Radio traffic reports		72							
Channel Tunnel									
Channel Tunnel use	40	108	124	124	61	117			
Dealers									
Attractions of an outlet	52								
Car finance	57	92	94	98	80	70	131	91	62
Dealers visited	57	86		96	84	74			
Deciding where to buy a car	52		96	86	93	77			66

Appendix 3 Lex Report on Motoring index

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Discounts							100		
Fixed versus negotiated prices/bargaining			92			101			
Personal service when buying a car	55						85		
Sales people						86			
Satisfaction with sales experience		88						71	68
Service and parts with car sales				88	95				
Shopping for a car						78		70	
Single franchise outlets				84					
Source of purchase of car	50	83	92	84	76	66	59	94	65
Test drives	57	86		96	84				
Treatment of women		94							
Driver and the motoring environment									
Britain's drivers							15	24	78
Costs of owning car/driving		36						40	
Commuting									87
Difficult to adjust lifestyle	16	34		48	62	34	20	17	71
Don't care what I drive	16			48	65		127		
Driving to work				48					86
Free parking				48					87
Items in car				58					
Learner drivers					112				
Ownership of household garage				50					
Privatisation of railways				66		21			
Reliance for different journeys							20		
School run						65			
Use of car	12			65		22			
Women drivers					42				
Would use public transport more	16	34	68	72	66	34	20	58	71
Driving									
Accidents and causes									26
Annoying behaviour								44	
Best drivers - men or women	18								30
Behaviour to other drivers							39		
Driving fast							19	46	16
Motorways		74				102			
In-car behaviour									24
Pleasure and problems of driving			50				17	37	
Road-rage/anger/stress			54					42	18
Provision for cyclists and pedestrians	77								
Road signs	76	60		120					
Standard of driving	20								12
Environment									
Catalytic converters		52							
Electric cars							31		
Threats to environment	24							62	
Use of unleaded petrol	26	51	88	66	56	108	32	108	

Appendix 3 Lex Report on Motoring index

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Who is responsible for environment							83		
Europe									
Buying cars in Europe				100					
Continental trips					60	116			
Car ownership	81	11	17	17	18	124	120	89	51
General									
Britain's cars	7	40	28	29	30	130	126	118	82
Car ownership expectations	38	42	36	38	32	52	33	82	54
Miles driven	9	32	30	32	44	60	23	19	85
Miles drive (work)		32		32	44	62	24	32	86
Law									
Attitude to MOT		59			114				46
Attitude towards breaking speed limits		64						46	16
Consumer protection					96				
Drinking and driving		62				28	41		20
Drugs and driving									20
Driving misdemeanours		56					39		
Driving offences					124				14
Jumping red lights	64						41		
Law breaking and traffic control		62		126					
Misuse of disabled stickers		58					40		
Protests against new roads								57	
Seat-belt laws				62					
Speed cameras		62			115	135	42		40
Speed limiters		64			116				
Traffic wardens/clamping	32				117				
New car sales									
Registrations UK and Europe	76	11	15	15	17	123	119	88	52
Trends and forecasts						15	76	81	52
UK market shares by manufacturer		12	16	16	19	125	121	90	59
Non-drivers									
Profile of non-drivers								30	
Reasons for not driving								27	
Reliance on car								29	
Use of car by non-drivers								28	
Policy									
Car sharing			86						
Driving test, written section					112				34
Driving test effectiveness		64							
Environment/traffic congestion			74			21	26	38	
Importance of car industry	69				128				
Non-use of public transport			72				20	58	
Motorway tolls						23			
Park and ride				74	52				
Paying for public transport				72				49	
Petrol tax versus road fund licence		37		71					
Road pricing				82					

Appendix 3 Lex Report on Motoring index

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Pollution versus congestion			76				128		
Support for transport policies			78	68			28	52	
Road tourist signs			67		120				
Use of public transport				70			20	58	
Safety									
Children and seat belts		66		60			70		
Dogs in cars		67							
Effectiveness of safety campaigns									32
Factors contributing to road safety		60					43		38
Safety features on car	22					27	55	66	42
Security									
Car theft - car or radio	28				122	32			
Concerns about crime						32			
Experience of crime						140			
Night time parking	30		46						
Security features			44	64		33	54		
Servicing									
Checking service work			120						
Control of servicing		101							
Coping with minor problems	14								
Deciding where to have car serviced		98	118				89	76	75
Distance to travel for service	61				105				
Frequency of service and repair					106	96	108	104	72
Importance of servicing	61			114					
Loyalty to location						93			
Satisfaction with servicing	65	101	116	118	110	98	111	73	74
Service intervals						100			
Service records							110		
Servicing modern cars					104				
Specialist versus franchise dealers	67	102							
Who services car	63	96	112	116	102	90	104	102	71
Teenagers									
Activities						114			
Concern about alcohol						47			
Concern about environment						47			
Features sought on car						46	66		
Getting their first car							68		
Interest and reliance on the car						45	63		
Use of the car						17			
Views on parents' driving						115			
Views on parents' cars						71			
Trucks/Truck drivers									
Changing size of trucks								62	
Driving standards									12
Profile of truck drivers									84
Reliance of industry on trucks								17	
Transport operator's views on use of trucks							55		

Appendix 4

Sources and acknowledgements

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Lex Vehicle Leasing, Marlow, May 1993

Lex Report on Motoring - The Consumer View
Lex Service PLC, London, January 1994

Lex Report on Motoring - The Company View
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Lex Report on Motoring - Listening to all road users
Lex Service PLC, London, January 1996

Lex Report on Motoring - Listening to the needs of company motorists
Lex Vehicle Leasing, Marlow, June 1996

Many thanks to the Department of Transport and the Central Office
of Information for help with the research on road safety campaigns
and providing copies of posters used to illustrate this section.



Lex Service PLC is a public company, incorporated in 1928, and quoted on the London Stock Exchange. Annual sales exceed £1.5 billion, placing it in the top 150 UK quoted companies, ranked by sales. It employs 10,000 people.

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 one of the leading retailers 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 provide 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** offer high quality body 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 80,000 vehicles representing most makes of cars and vans and is jointly owned with Lombard.

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

Lex Commercials is the largest truck and van distribution group in the UK. **Lex Transfleet** in the UK and **Seltra** in France provide contract hire and rental of trucks. Lex is also a major distributor of truck and van parts through **Multipart** and has the UK distributorship for **Isuzu** trucks.

Lex provides contract hire, rental and servicing of lift trucks in the UK through **Lex Harvey**, and **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 1997



1997 Lex Report on Motoring

"Driving for Safety"

CARTOONS

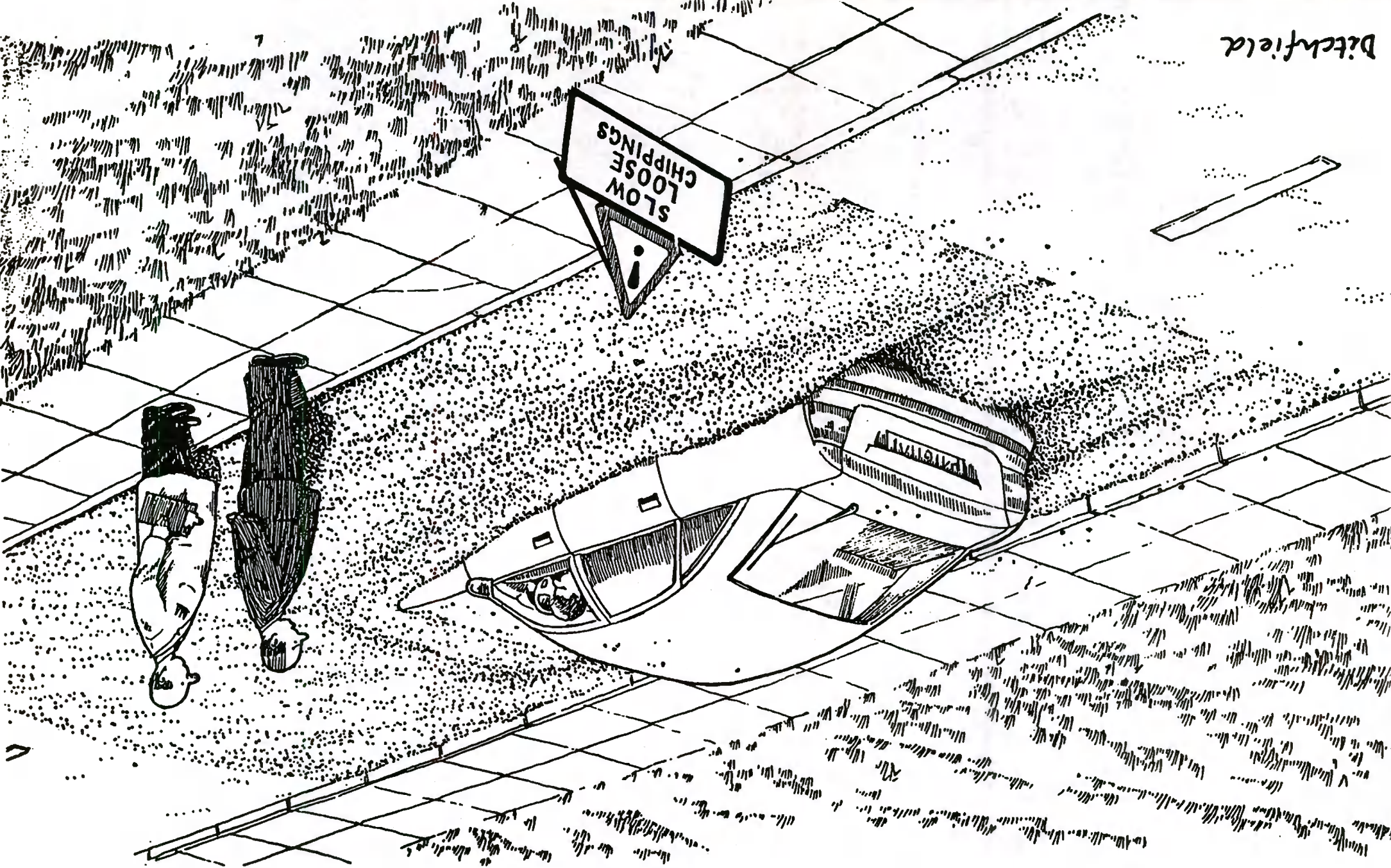
1. Road Safety Policies - *"I think it may be a little too effective, Johnson"*

The 1997 Lex Report on Motoring published today by Lex Service PLC, the UK's leading vehicle retailing and leasing group, reveals that drivers believe that the most effective policy options to improve road safety are those related to reducing speeding.

2. Car Design - *"Perhaps a little less emphasis on safety and more on styling."*

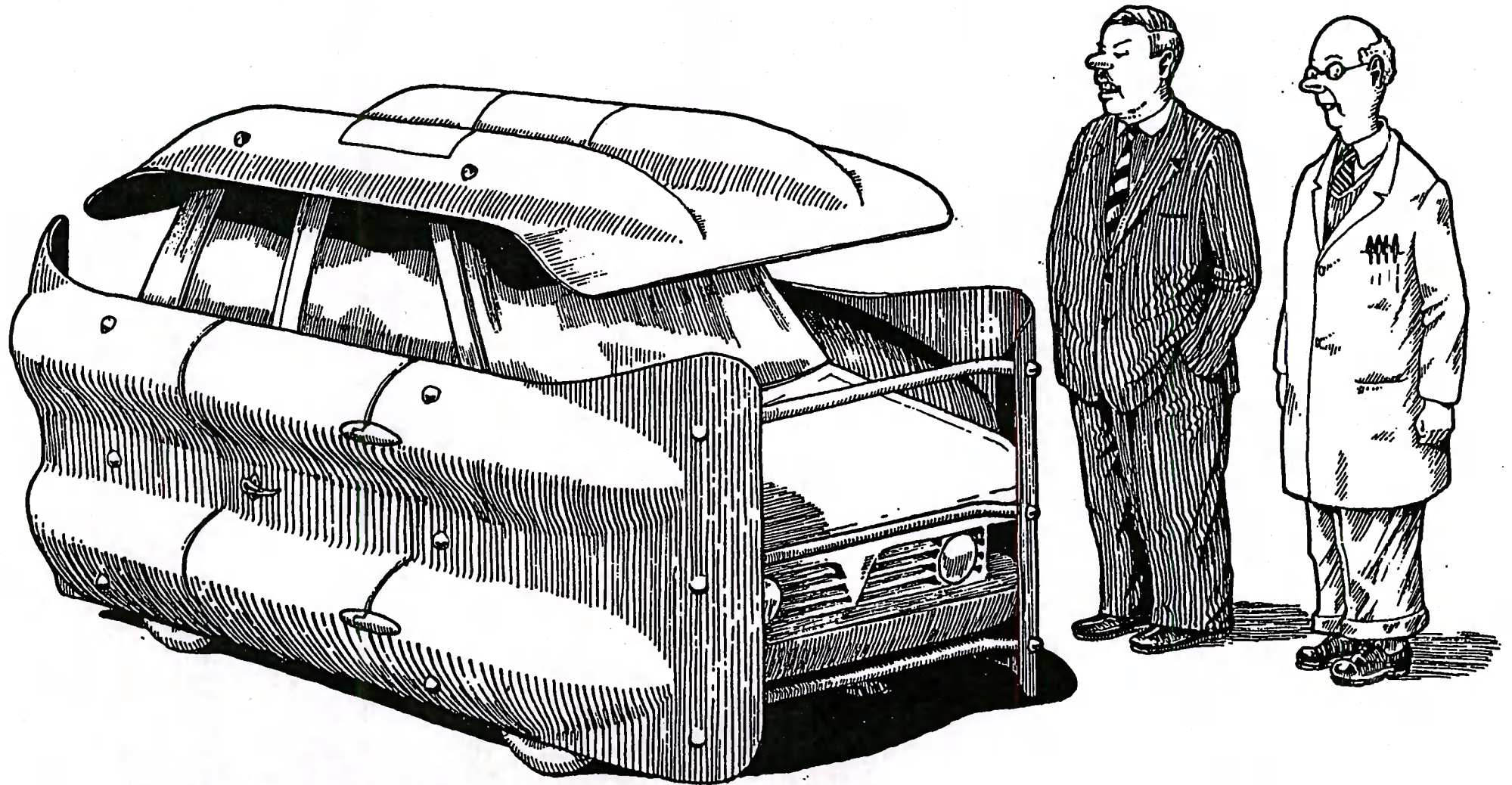
The 1997 Lex Report on Motoring identified the relative buying priorities of drivers when choosing a car. Safety is fourth on the list after price, size and fuel consumption, though it rates above styling and environmental performance.

This is probably due to the progress that manufacturers have made. This view is supported by the findings of Lex's which reveals that driver and passenger safety was the area where drivers felt manufacturers had made the most progress over the past ten years.



I think it may be a little too effective, Johnson

Hmm. Perhaps a little less emphasis on safety, and more on styling



Ditchfield

Embargo: 00.01 hrs, Wednesday 22 January, 1997

WHAT SORT OF DRIVER ARE YOU !

The following is a humorous interpretation of the shared characteristics of five different groups of motorists identified in the 1997 Lex Report on Motoring, "Driving for Safety", published today by Lex Service PLC, the UK's leading vehicle retailing and leasing group:

Mrs Jen Uwin-Le-Good



Jen is an older middle-aged woman who owns her own car. She is convinced of her own abilities as a driver and in many ways is right to do so. She is not judgmental and therefore tends to be calm when others drive badly. Out of all of our drivers, Jen is the least likely to have ever had an accident - *38% of drivers are like Jen and belong to this the 'Self Righteous' Group*

Mr Hugh Mility

Hugh is an older man and unfortunately not very confident of his own abilities as a driver. Hugh sticks to the speed limit rigidly, after all rules are there to be followed. He accepts that some people are careless drivers and knows that getting annoyed won't solve it. He is the least likely type of driver to have had an accident in the last year (only 2% chance) - *10% of drivers are like Hugh and belong to this the 'Humble Saints' Group*



Mr Arthur Mind-To-Sooya



Arthur is middle aged, owns his own car and is a law abiding citizen who keeps to the speed limit. However when Arthur sees others driving "badly", his temper flares and he becomes a road rager. Yet Arthur does suffer from slight hypocrisy as his own driving record is not exemplary. His annoyance with other drivers makes him an above average candidate for an accident - *14% of drivers are like Arthur and belong to this the 'Angry Moralists' Group*

Mr Ivor Got-It-Right

Ivor is a cool calm customer, older middle aged with a company car and it is very difficult to ruffle his feathers. For Ivor, the speed limit is a guide, not a rule and with his self confidence he often breaks the barrier. He is more likely than average to have an accident - *21% of drivers are like Ivor and belong to this the 'Cool and Cavalier' Group*



1997 Lex Report on Motoring - What sort of Driver are you ! (cont'd page 2.)



Mr Ewen Hughs-army Ewen is young, male and drives his company car mile after mile. He's a speed freak who likes to behave badly, but hates it when any one else disturbs his drive. Not adverse to a tippie Ewen is the most likely driver to drive over the legal alcohol limit and to have an accident - *18% of drivers are like Ewen and belong to this the 'Mad and the Bad' Group.*

For more information:

David Leibling	Lex Service	(0171) 705 1212
Lesley Springall, Martin Lewis	Brunswick	(0171) 404 5959

Notes to Editors:

The above personification of drivers is based upon the driving qualities and description of most likely characteristics according to the results of the 1997 Lex Report on Motoring.

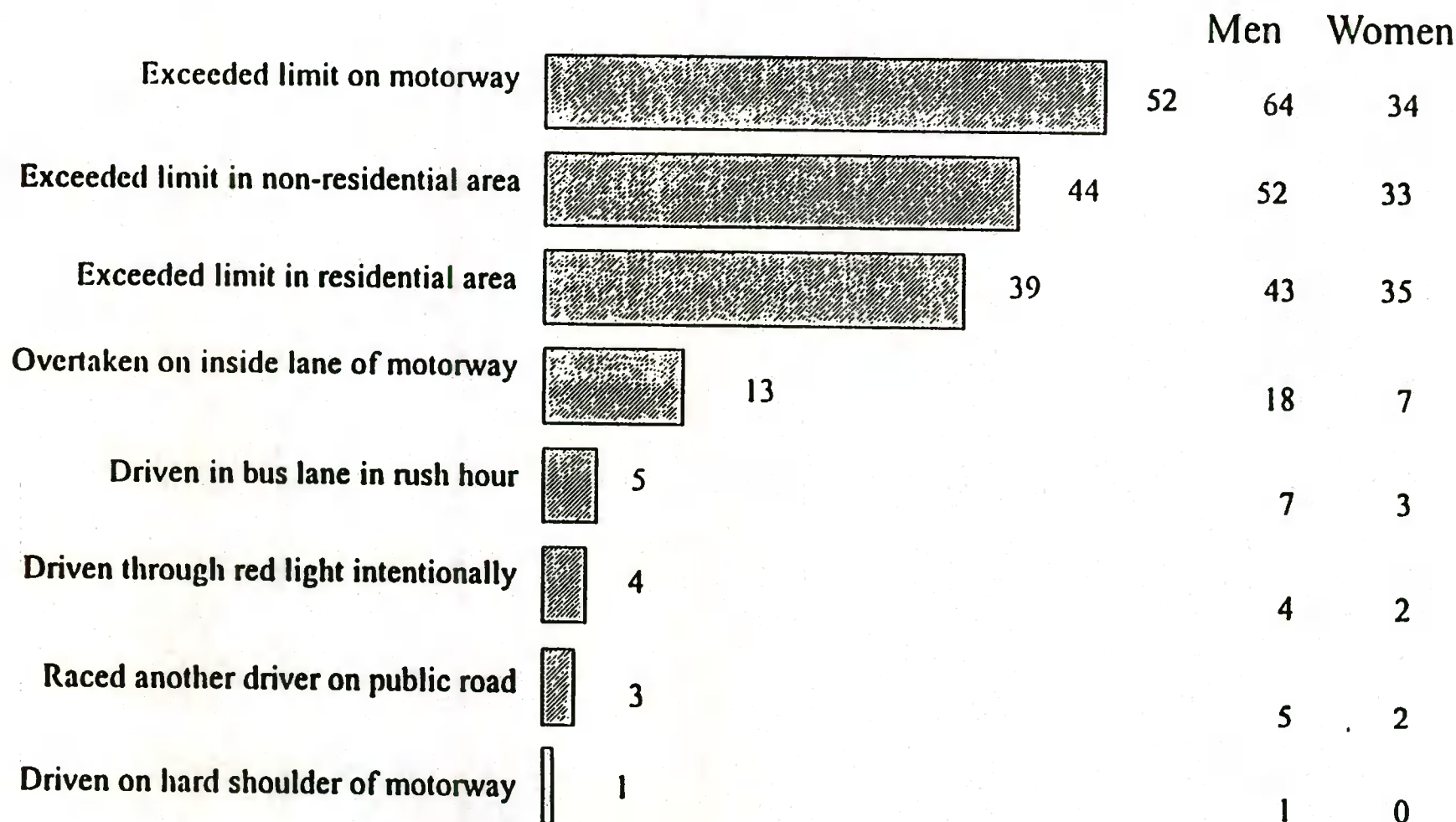
The Lex Report on Motoring is regarded as the authoritative annual survey on motoring in Britain. It contains research conducted by MORI for Lex Service PLC, the UK's leading vehicle retailing and leasing group. This year a nationally representative sample of 1,209 drivers were interviewed in Britain on a face-to-face basis between 10/10/96 and 18/11/96. The sample included a boosted quota of 300 company car drivers. Additional interviews were also conducted with 163 truck drivers across Britain during the same period. Copies of the full report (£295) are available from Lex Service PLC.

Other areas covered in the report (and highlighted by separate news releases) include:

- (Bad) driving habits
- Education and Information
- Policies for Safer Roads
- Commuting attitudes
- Safety records of cars and the MOT test
- An overview of car ownership and retailing
- Truck drivers' attitudes to driving.

The level of speeding and traffic dodging

% of drivers who done the following in the past 12 months



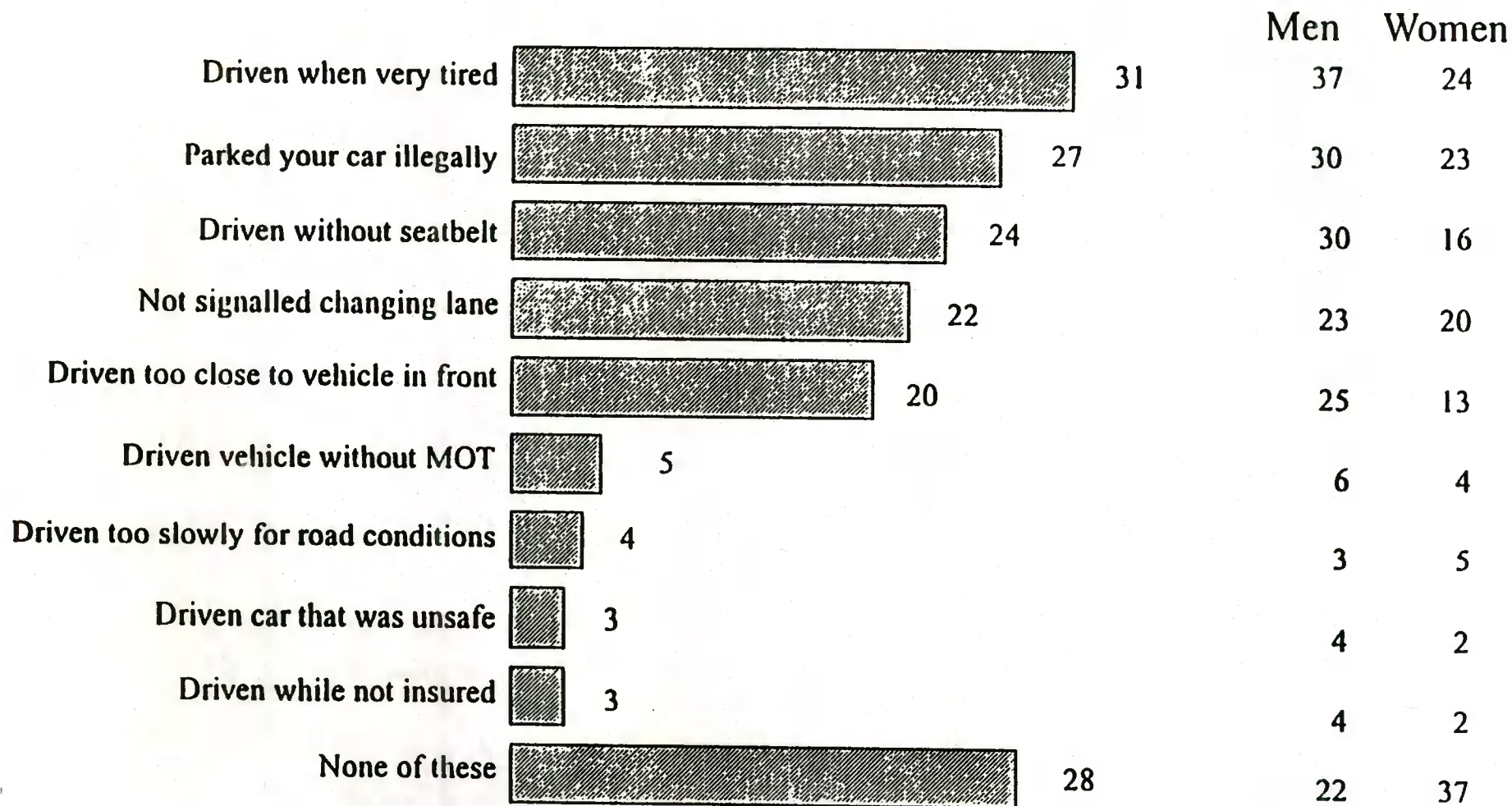
Base: All car drivers (1,209)

Source: 1997 Lex Report on Motoring, "Driving for Safety"/MORI



The level of dangerous driving behaviour

% of drivers who done the following in the past 12 months



Base: All car drivers (1,209)

Source: 1997 Lex Report on Motoring, "Driving for Safety"/MORI



PRESS RELEASE

Embargo: 00.01 hrs Wednesday 22 January, 1997

SAFETY OF CARS TAKEN FOR GRANTED **and Length of Ownership Still Not Returning to Pre-Recession Levels**

The 1997 Lex Report on Motoring, "Driving for Safety", published today by Lex Service PLC, the UK's leading vehicle retailing and leasing group, shows that motorists take the safety of modern cars for granted as it is not one of their main concerns when choosing a car. This is supported by national statistics which show that despite car travel rising by 600% between 1950 and 1995, the number of deaths has fallen by 55%, with the most dramatic decline in the last five years. Much of this decline can be attributed to manufacturers with the introduction of substantial safety devices from seat belts to airbags and crumple zones. In fact, driver and passenger safety was the area where drivers felt manufacturers made the most progress over the past ten years, in last year's Lex Report.

Commenting on this, Sir Trevor Chinn, Chairman of Lex Service PLC, said:

"Although manufacturers have done a considerable amount to improve the safety of cars, there is little they can do to combat bad driving habits. As the number of cars on our roads increases, the whole industry needs to work together to continue to encourage more responsible driving practices to improve drivers' safety as well as that of other, often more vulnerable, road users."

Buying Priorities and the Relative Importance of Safety

Safety (35%) is fourth on the list of buying priorities for cars after price (74%), size (54%) and fuel consumption (51%). It still rates above environmental performance (15%) and acceleration (14%) but has not risen in importance since the question was last asked in 1992. Almost half (48%) said safety will be important when deciding on their next purchase. Acceleration and security features have increased in importance since 1992 with environmental performance declining slightly.

However, although only 1 in 5 drivers have ABS and 1 in 5 have driver airbags in their current cars, 3 in 5 expect them on their next car and over 4 in 5 would have all the major safety features if money were no object.

T1

Page 1 of 4

The Relative Safety of Cars and Confidence in the MOT

While safety features can improve the chances of surviving accidents with less severe injury, newer cars are more likely to be involved in accidents than older models. 43% of all accidents in the last year involved drivers of cars under three years old. This may be because newer cars are increasingly powerful and many new cars are driven by company car drivers who tend to be high mileage drivers and admit to bad driving habits. Only 2% of drivers said that their last accident was caused at least in-part by an old or mechanically unsafe car.

Confidence in the MOT test has risen since the Lex Report first investigated this in 1988, with 16% saying they are "very confident" that cars passing the MOT are safe to drive compared with 7% in 1988. In total 66% of today's motorists are very or fairly confident in the MOT (62% in 1988).

Expectations of future ownership

The Lex Report demonstrates the reliance of UK car owners on their vehicles, with a consistent 4 out of 5 (82%) of motorists saying they would find it difficult to adjust their lifestyle to being without a car. The number of cars in use has risen by over 20% in the last ten years, compared with population growth of 4%. The number of households with two or more cars has levelled out at 42% with 50% of the motoring public expecting there to be two or more cars in their household by the end of 1998 (a slightly lower projection than last year) which would lead to another 900,000 cars on the road.

Interestingly, 55% of women now have driving licences compared with 81% of men, and the difference is diminishing rapidly as the first generation of women for whom it was commonplace to get a driving licence grow older and hence the proportion of women with licences grows. If the same proportion of women as women had driving licences this would mean another six million drivers on the road.

Replacement Cycles

Replacement cycles are key to car sales. In 1989 motorists expected to keep their cars for 3.5 years which then rose during the recession to 4.2 years. Because drivers realised that cars were higher quality and more reliable they did not revert to their pre-recessional behaviour and the replacement cycle remained at 4.2 years from 1992 to 1995. In 1996 it rose to 4.6 years. Private buyers have extended the average length of time they keep their cars from 4.4 to 4.7 years (whether they buy a new or used car).

1997 Lex Report shows safety of cars not top priority (cont'd.../page 3.)

Company buyers have extended from 2.7 to 3.1 years, mainly because of an increase in the proportion keeping their cars for four or more years. This extension explains why the new car market only rose by 4% in 1996.

The Buying Experience

Smaller manufacturers are increasing their market share which reflects a more open market, but also demonstrates the low level of loyalty of today's motorists. Only 40% of new car buyers and 23% of used car buyers in the last two years bought the same make as their previous car, with 35% of new car buyers and 18% of used car buyers buying their cars from the same dealer as before.

The most common reason for choosing a dealership is the value they offer, though customer and after sales service are the next most important, especially for new car buyers with 1 in 3 rating each service area as important compared with around 1 in 4 for used car buyers.

The greatest number (43%) of all cars are still bought with cash (compared with 50% in 1995), although the number of people using credit to buy cars rose during 1996 through finance company loans (18%), bank loans (13%) and hire purchase (11%). The various leasing deals (contract hire, full service leasing, finance leasing and contract purchasing) now represent 18% of new car purchases. The use of credit to buy cars is more common in the used car market. Older people and men tend to spend more on their cars, which are on average newer and the most popular times to visit a dealership remain week-day evenings and Saturday and Sunday afternoons.

Source of Purchase

Of the 1.7 million new cars bought in 1996, excluding those supplied to companies directly, the vast majority (1.4 million) are still bought through operations selling only one make. Of the 6.1 million used cars sold, approximately 1.5 million each are sold by franchised dealers, used car dealers and privately. A further 1.1 million are sold/transferred between friends and relatives. Franchised dealers sell half the used cars aged under three years old. Over the past nine years of Lex Report surveys, the proportion of used cars sold through new car dealers has fallen from 34% to 26% and the proportion of cars sold through used-car dealers has risen from 17% to 25%.

1997 Lex Report shows safety of cars not top priority (cont'd.../page 4.)

Servicing

Since the first Lex Report in 1988, there has been a fall in the proportion of people servicing their own car (from 23% to 17%) and a slight rise in the use of dealers/workshops (from 63% to 68%) and the use of mobile service units and service centres (but these still only represent 5% of the market).

Service frequency fell by 13% between 1992 and 1996, especially for new cars (from 1.6 to 1.4 services per year) while the average number of repairs stayed constant at 0.9 occasions per year. The main trigger to getting the car serviced is recommended service intervals (45%) or a fixed number of miles (32%) for most new car owners. For used car owners it is a combination of recommended service intervals (19%), after a certain number of miles (24%), after a certain time (18%), when something goes wrong (14%) and the MOT (12%, compared with only 4% for those who bought their car from new).

Net satisfaction with car servicing rose again this year, with 88% of those who went to their main dealer and 97% who went to a garage workshop saying they were satisfied with the work. Older people, women and private car owners tend to be more satisfied with company car drivers often the most critical. The most attractive service options were the opportunity to get a full explanation of the work done (with 66% strongly supporting this option and 91% in total attaching some merit to the idea), the chance to talk directly to the mechanic (43% strong support and 72% overall support), to have original parts fitted to their car (31% strong support and 55% overall support) and a while-you-wait service for minor tasks (21% strong support and 58% overall support).

- Ends -

For more information:

David Leibling	Lex Service	(0171) 705 1212
Lesley Springall, Martin Lewis	Brunswick	(0171) 404 5959

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Other areas covered in the report (and highlighted by separate news releases) include: Speeding and road rage * Attitudes to drinking, drugs and bad driving * The causes of accidents * Education and Information * Policies for Safer Roads * Commuting attitudes * Truck drivers' attitudes to driving

1997 Lex Report on Motoring

Driving for Safety



PRESS RELEASE

Embargo: 00.01 hrs, Wednesday 22 January, 1997

MORE SPEED CAMERAS AND COMPULSORY RETESTING WOULD MAKE ROADS SAFER, REVEALS LEX REPORT

The ninth annual Lex Report on Motoring, "Driving for Safety", published today by Lex Service PLC, the UK's leading vehicle retailing and leasing group, explores the different facets of road safety and discovers that even the worst offenders believe in tougher penalties.

Road Safety Policies

Although road safety is seen by many drivers as less important than pollution or congestion it is still of concern to most. The safety of pedestrians and cyclists is seen as a major problem by half of all drivers, while the safety of car users is seen as a major problem by 1 in 3 (possibly reflecting the increased safety features on cars). Drivers felt that the following policy options would be the most effective in improving road safety:

- * Introducing more speed cameras on roads (53%)
- * Flashing slow down signs triggered by speeding vehicles (48%)
- * More education, training and publicity (46%)
- * Introducing more cameras at traffic lights (39%)
- * Building more town and city centre by-passes (36%)

Creating more cycle lanes (36%) and pedestrian only areas (32%) also received support. The least effective options were considered to be the reduction of speed limits (10%) and building more motorways (11%).

For Speeders...

Most drivers, though particularly women and older age groups, believe that the speed limit should not be broken on motorways (58%) or in towns (84%) with speeding still cited by many as a major cause of accidents. The 1997 Lex Report also shows that a large minority of drivers speed consistently. When asked what would stop them speeding the response could be summarised as "catch us and fine us on the spot".

1997 Lex Report reveals more speed cameras would make roads safer (cont'd.../page 2.)

66% of "speeders" agreed with the general view that more speed cameras would be effective (with fines for those driving over 20 mph over the limit) and 46% said that on the spot speeding fines would work.

Over a third (36%) thought they would be deterred by heavier penalties for exceeding the speed limit and by the introduction of "banning for 3 months" if caught driving over 10 mph over the speed limit in residential areas. Another third (34%) felt that installing more speed bumps would be effective in reducing their speeds and just under a third (28%) by the police enforcing limits more strictly. However few speeders felt that a hard-hitting advertising campaign (19%), publishing their names in the local paper (21%) or installing tachographs in their cars (15%) would make them less likely to exceed the speed limit.

Compulsory Retesting of older people and past offenders...

There was also strong support among motorists for legislative change to retest drivers who reach 70 years old (82%) and when they have been banned from driving (84%). Although, perhaps unsurprisingly, there was less support among the over 55's for compulsory retesting at 70 (62%).

Speed Cameras

Driver awareness of speed cameras has risen substantially from 66% in 1993 to 89% today. Likewise more drivers now say they make a difference to their speed (from 61% in 1993 to 68% today). However, although over a third say they generally drive more slowly on roads with speed cameras, almost another third admit to only slowing down for the cameras. This was particularly the case among men, younger people and company car drivers.

Nearly a quarter of drivers have, to their knowledge, exceeded the speed limit when passing a speed camera. 2 in 5, or an estimated two and a half million, drivers recall having been flashed at by the cameras (84% of whom were men). However, only 1 in 8 of these has been prosecuted so far, though this is likely to change with the advent of digital recording instead of film (which runs out).

The New Driving Test

There is strong support for the newly introduced written part of the driving test with 81% of drivers saying they believe it is a good idea.

1997 Lex Report reveals more speed cameras would make roads safer (cont'd.../page 3.)

This is mirrored by the increasing number of motorists (64%) who believe that the practical driving test is effective in ensuring that new drivers are safe road users (55% in 1989). However, 59% of drivers admitted that they thought they would fail the driving test if they had to take it again. This was tested in the 1997 Lex Report Survey by asking respondents three questions from the new written test.

A quarter (25%) got all the questions wrong, and another half (49%) only got one question right - so given that you need two out of three questions correct, three quarters would have failed their test. Only 5% got all three questions correct. Men did better than women with a quarter of men who would have passed the written test, compared with less than 1 in 5 women.

Driver Education Policies - The Power of Advertising

When questioned about the Government's information programmes the main areas of spontaneous recall were the high profile drink driving (91%), car security (78%) and speeding (66%) campaigns. The slogans of specific advertisements continue to have strong recall, some even after a substantial number of years, and their perceived effectiveness in changing behaviour is sometimes high:

- * Drinking and driving wrecks lives - 82% recall, 47% effective
- * Kill your speed not a child - 81% recall, 41% effective
- * Car crime together we'll crack it - 75% recall, 14% effective
- * Always follow the green cross code - 74% recall, 20% effective
- * Clunk Click, Every Trip - 61% recall, 37% effective
- * Stop, Look, Listen, Live - 32% recall, 5% effective
- * Tough nuts are hard to crack - 8% recall, 1% effective

An effectiveness measure was derived from the ratio of those who say an advertisement was effective to the proportion of drivers recalling it: the Clunk-Click campaign was the most effective, on this measure with the drink driving campaign a close second. The least effective are car crime, "tough nuts" and "stop and live" campaigns.

Drivers' priorities for future Government spending on campaigns were also clear, with combating drink driving (60%) and driving more slowly in towns (44%) being highest on the list. Increased awareness of the problems of road rage also meant that 36% of motorists think that this should be the target of a Government campaign. Other (slightly lower) priority areas include car maintenance, using illegal drugs while driving and the use of mobile phones in cars.

1997 Lex Report reveals more speed cameras would make roads safer (cont'd.../page 4.)

Commuters' Attitudes

4 in 5 employed motorists (79%) choose to drive to work. 55% said that they drive because it is the quickest way to work and 36% because they will need their car when they get to work. 28% said that although they could use public transport they take their car because it is more convenient, 26% because they say there is no public transport service available and around a quarter because driving was enjoyable (23%) or comfortable (26%).

The Effect of Free Parking

Over 1 in 5 (21%) of those who drive to work said they do so because parking was cheap or convenient. Just over half (51%) of those who drive to work are provided with free parking at their place of work, with a further 6% provided with free parking near work, leaving 2 in 5 (43%) without any parking provision by their firms. Only 29% of those who would have to pay for parking if their firms did not provide free or subsidised places say that they would use another form of transport if this happened. The most popular forms of alternative transport they would choose are the bus (37%) and the train (22%).

Commenting on the results, Sir Trevor Chinn, Chairman of Lex Service PLC, said: *"Although serious injuries on our roads have decreased significantly over the last decade, motorists, and even persistent offenders, believe that there is a need for tougher penalties to help make our roads safer. The 1997 Lex Report puts forward some solid suggestions from drivers themselves and we hope these will help in the battle to continue to improve road safety in Britain today."*

- Ends -

For more information:

David Leibling	Lex Service	(0171) 705 1212
Lesley Springall, Martin Lewis	Brunswick	(0171) 404 5959

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Other areas covered in the report (and highlighted by separate news releases) include: Driving standards * Speeding and road rage * Attitudes to drinking, drugs and bad driving * The causes of accidents * Safety records of cars and the MOT test * An overview of car ownership and retailing * Truck drivers' attitudes to driving. Q4

1997 Lex Report on Motoring "Driving for safety"
Key results by demographic group

	All	Men	Women	17-34 year olds	35-54 year olds	55+ year olds
Number of regular drivers (million)	26.2m	15.5m	10.7m	10.0m	10.2m	6.0m
Driving standards	30	35	25	27	32	34
% saying general standards good/very good	74	70	79	70	75	78
% saying personal standards good/very good	26	31	18	25	28	22
% "passed" written driving test (more than one out of three right)	9	11	8	13	8	5
% had accident in the last 12 months						
Rage *worse than just gesturing or verbal abuse	31	39	20	37	34	18
% felt like committing serious road-rage*	12	15	6	17	10	5
% committed serious road-rage*	38	39	37	42	40	30
% victims of serious road-rage*						
Speed limits	58	49	70	51	57	69
% thinking motorway speed limits not be broken						
In car behaviour	3	4	1	6	1	
% kissed/cuddled in last 12 months whilst driving	27	34	16	31	30	15
% nodded off at the wheel						
Drink and drug driving						
% been in a car where driver under the influence of any alcohol/drugs	29	33	24	36	31	15
% driven a car under the influence of any alcohol/drugs	18	23	11	21	20	10

Base: All car drivers (1,209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Lex Service PLC (0171) 705 1212

January 1997

1997 Lex Report on Motoring "Driving for safety"
Key results by region

	All	London and South-East	South-West/Wales	Midlands and East Anglia	North of England	Scotland
Number of regular drivers (million)	26.2m	8.4m	3.6m	5.1m	6.7m	2.4m
Driving standards						
% saying general standards good/very good	30	35	21	28	30	37
% saying personal standards good/very good	74	75	73	68	76	80
% "passed" written driving test (more than one out of three right)	26	24	23	27	28	25
% had accident in the last 12 months	9	12	5	9	9	2
Rage *worse than just gesturing or verbal abuse						
% felt like committing serious road-rage*	31	30	34	30	33	28
% committed serious road-rage*	12	10	13	14	12	7
% victims of serious road-rage*	38	42	42	35	38	23
Speed limits						
% thinking motorway speed limits not be broken	58	55	55	55	59	77
In car behaviour						
% kissed/cuddled in last 12 months whilst driving	3	2	3	1	3	4
% nodded off at the wheel	27	24	31	29	27	20
Drink and drug driving						
% been in a car where driver under the influence of any alcohol/drugs	29	32	29	26	31	18
% driven a car under the influence of any alcohol/drugs	18	23	15	13	20	9

Base: All car drivers (1,209)

Source: 1997 Lex Report on Motoring, "Driving for safety"/MORI

Lex Service PLC (0171) 705 1212

January 1997

PRESS RELEASE

Embargo: 00.01 hrs, Wednesday 22 January, 1997

DRUGS, DRINK, SPEEDING AND BAD MANNERS CONTINUE TO PLAGUE OUR ROADS

- Women Stand Out as More Responsible Drivers Than Men

Following the findings of last year's Lex Report which uncovered the extent of the problem of road rage, the 1997 Lex Report on Motoring, "Driving for Safety", published today by Lex Service PLC, the UK's leading vehicle retailing and leasing group, looked at the causes of road rage and the habits and driving standards of today's motorists. Key findings include:

- * Women's confidence in their driving ability is high compared to men's, supported by evidence of their more responsible driving attitudes and lower rate of accidents
- * Men, the under 35s and company car drivers (who cover extensive miles) are the most likely to admit to bad driving habits and have the highest number of accidents
- * The majority of drivers admit to feelings of road rage
- * An estimated half a million people admit to being in a car when the driver was under the influence of an illegal drug and there is support for more stringent laws on drink driving

Commenting on the results, Sir Trevor Chinn, Chairman of Lex Service PLC, said:

"Following the findings of last year's Lex Report on road rage, this year's concentrates on making our roads a safer place. Manufacturers continue to make cars safer, but the commonest cause of accidents is still driver error with bad driving habits cited as the main cause of road rage. Perhaps more male drivers should learn from their female counterparts, who have fewer accidents and a more responsible driving attitude on our roads."

Driving Standards

Motorists generally think that driving standards in Britain today are bad or very bad (33%) or average (36%). However most people think they personally are good or very good drivers (74%)- only 1% said they were bad drivers. Views on the driving abilities of men compared with women have changed substantially since the first Lex Report in 1988 with men becoming less sure of their own superiority with only 24% saying that they are the better drivers, compared with 35% in 1988.

1997 Lex Report shows Women are the most Responsible Drivers (cont'd.../page 2.)

However women's confidence in their driving ability is growing, with 54% now believing they are better than men compared with 45% in 1988. Overall, 31% of motorists believe women are better drivers (8% in 1988) compared with 18% who believe men are (19% in 1988).

Road Rage

On average each year, over the past two years, over two million people have been the victims of road rage, ranging from 1.4 million drivers who have been forced to pull over or off the road to 130,000 who have been attacked by other drivers. This is in addition to the commonplace verbal abuse and gesturing committed almost equally by men (54%) and women (49%) and suffered by 39% of all motorists, and tailgating which 33% of all drivers have suffered in the last 12 months. Most people admit to feelings of road rage (73%). Over the last 12 months, 52% admitted to verbally abusing or gesturing at another driver and, an estimated, 800,000 people admitted to committing one of the more serious expressions of road rage from threatening another driver, damaging their car to forcing another driver to pull over or off the road. Bad driving habits cause road rage, with the main reasons given as other drivers cutting in sharply and overtaking (36%), driving too close behind (26%) and failing to signal correctly (25%).

Bad Driving Habits

Over 7 in 10 admit to at least one case of poor driving behaviour in the last 12 months:

- * 22% to not signalling when changing lane or direction (evenly split between men - 23% and women - 20%).
- * 20% to tailgating (a quarter of all men - 25% which is twice as many as women - 13%).
- * 3% or, an estimated three-quarters of a million drivers, have driven knowing their cars were unsafe (over 60% of whom were under 35).
- * 1 in 3 (31%) has driven when very tired (37% of under 35's, compared with 16% of over 55's).
- * Over a quarter (27%) of people admit to falling asleep behind the wheel, with 2% (mainly male, the under 55's and higher mileage drivers) accounting for over a third of all incidents.
- * Half a million drivers (and 6% of all under 35's) admit to racing another driver on a public road in the last 12 months alone.

1997 Lex Report shows Women are the most Responsible Drivers (cont'd.../page 3.)

i) Speeding - 52% of drivers broke the speed limit on a motorway in the last 12 months with another 44% admitting they broke the limit in a non residential and 39% in a residential area. Men, younger people and drivers of company cars were the most likely to admit to breaking the limit. This disregard for speed limits by certain groups is reflected in their attitudes, with most women and over 55s (around 70% of both) believing that the speed limit on motorways should not be broken except in exceptional circumstances, compared with only half of men (49%) and young people (17 to 34 years olds, 51%) and less than 2 in 5 company car drivers (38%). Few people (14%) felt it was acceptable to disregard speed limits in towns.

ii) Rubber-Necking - 43% of car drivers admit to slowing down to look at the site of an accident and 37% to looking but carrying on at the same speed. 2% or, an estimated 500,000, drivers admit to changing lanes to gain a better look at an accident (most of which were men or under 35). Truck drivers were the least interested with only 29% who admitted to slowing down to have a look - although 2% have been in accidents as a result, compared with 0.4% (or 100,000*) car drivers.

iii) Drugs and Drink Driving - Over 2½ million people* were in a car when the driver was under the influence of illegal drugs or over the legal alcohol limit in the last year. Including:

- * Two million people have been in a car when the driver was over the legal alcohol limit
- * Half a million when the driver was under the influence of cannabis
- * A quarter of a million when the driver was under the influence of speed
- * 100,000 people when the driver was under the influence of ecstasy, cocaine or heroin

Of those who admit travelling in a car while the driver was over the legal limit of alcohol, two thirds (70%) were male and 95% were under 55. Three quarters (75%) of those who admit being driven by drug users were male and 87% were under 35. Nearly two thirds (65%) of drivers think that drinking and driving over the legal limit is extremely dangerous which, interestingly, was slightly higher than the 60% who thought the same about driving after taking speed/amphetamines or marijuana (44%). Two thirds (68%) of people also think that legal stimulants, such as Pro plus, have some danger attached to them when combined with driving. Medicines likely to cause drowsiness were perceived as dangerous by most people though only 23% thought it extremely dangerous to drive after taking them (which was a more common view among the over 55's).

(* - Figures are grossed up estimates from a sample of 1209 motorists surveyed for the 1997 Lex Report)

1997 Lex Report shows Women are the most Responsible Drivers (cont'd.../page 4.)

78% of motorists think it is dangerous to drive after drinking any alcohol even below the legal limit (18% believe it is extremely dangerous). Support for random breath testing has remained high since 1989 (84% support) but only 31% now believe drink drivers should be automatically imprisoned (45% in 1989). 51% support reducing the drink-drive limit to half its current level.

Accidents

The higher mileage and poorer driving behaviour of men, young people and company car drivers result in them having more accidents. 13% of young people (17 to 34 year olds), 11% of men and 14% of company car drivers admit to having an accident in the last year compared with 9% of all car drivers. 57% of drivers admit to having had an accident at some time. Women are less likely than men to have accidents with 53% compared with 35% saying they have never had an accident.

The most common accident is hitting another vehicle at low speed (53%) followed by crashing at speed (24%) with 12% resulting in injuries. The vast majority of people say that their most recent accident was someone else's fault, though more men, young people and company car drivers admit to it being their fault. Driving too fast is given as the most common cause of accidents followed by bad weather conditions, but most accidents are caused by driver error. Interestingly, not signalling, driving too closely to the vehicle in front and driving too fast (all causes of road rage and some of the more common causes of accidents) were significantly more prevalent among the under 35s and those who said the accident was their fault.

- Ends -

What type of driver are you?... See the news release on the best and worst types of driver identified in this year's Lex Report on Motoring

For more information:

David Leibling	Lex Service	(0171) 705 1212
Lesley Springall, Martin Lewis	Brunswick	(0171) 404 5959

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Other areas covered in the report (and highlighted by separate news releases) include:

Education and Information * Policies for Safer Roads * Commuting attitudes * Safety records of cars and the MOT test * An overview of car ownership and retailing * Truck drivers' attitudes to driving.



Embargo: 00.01 hrs, Wednesday 22 January, 1997

TRUCK DRIVERS ARE EXEMPLARY ROAD USERS THOUGH MORE PRONE TO SERIOUS FEELINGS OF ROAD RAGE

The 1997 Lex Report on Motoring, "Driving for Safety", published today by Lex Service PLC, the UK's leading car and truck retailing and leasing group, looks at the attitudes and behaviour among Britain's truck drivers for the first time.

Commenting on this decision, Sir Trevor Chinn, Chairman of Lex Service PLC, said:

"Due to the high mileage they cover and their professional driving skills, truck drivers provide a unique perspective on the problems of driving safely on the roads today and it is critical that their views are taken into account when planning road safety policies."

The report's findings show that truck drivers are generally exemplary road users. However, they also are more likely to commit road rage than ordinary car drivers.

Driving Standards

Truck drivers are divided in their views on driving standards in Britain: 38% say standards are poor and 28% say they are good, (car drivers say 33% are bad and 30% are good). Truck drivers also rate their own driving skills more highly, with 21% saying they are "very good" and 58% "good", compared with 14% and 60% of car drivers, respectively.

"Rubber-Necking" and Speeding

When it comes to rubber-necking, or slowing down to look at the scene of an accident, truck drivers (29% of whom admit to having ever done this) appear to be more responsible than people in cars (43%). However, 2% of truck drivers admitted to being involved in an accident as a result of this behaviour compared with 0.4% of car drivers. Truck drivers are also more responsible than car drivers when it comes to speeding with 64% believing that the motorway speed limit should only be broken in exceptional circumstances, compared with 58% of car drivers (particularly women and older drivers). However, car and truck drivers have a similar attitude to speeding in built-up areas with 84% and 83%, respectively, believing that it should not be broken except in exceptional circumstances.

1997 Lex Report looks at Truck Drivers (cont'd.../page 2.)

Road Rage

Road rage, surveyed for the first time in last year's Lex Report, poses a continuing risk to Britain's road users. While truck drivers are model citizens in most areas, the Lex Report shows they are more likely to feel like committing acts of road rage. Over four fifths (81%) of all truck drivers felt like verbally abusing or gesturing to another driver (and 66% admitted they had), compared with two thirds (66%) of car drivers (where 52% admitted they had). Although only 1 in 5 truck drivers said they sometimes felt like committing one of the more serious road-rage acts, such as assaulting another driver or ramming a vehicle only 9% of the sample questioned actually admitted to doing this (compared with 3% of car drivers). This includes 6% of truck drivers who admitted getting out of their truck and physically threatening another driver and 5% who had forced another driver to stop.

Accidents and drink/drug driving

More truck drivers (18%) than car drivers (9%) had an accident last year, but a lower number of accidents when compared on a per mile basis. Similar numbers of car (43%) and truck drivers (39%) had never had an accident. 9 out of 10 truck drivers claimed not to have driven under the influence of drugs or alcohol in the last year, 8% said they had drunk some alcohol though under the limit, while only a very small number (less than 1%) admitted driving over the limit or under the influence of marijuana (compared with 3% and 0.5% of car drivers, respectively).

Improving Road Safety

Truck drivers believe more education, training and publicity would be the most effective way to improve road safety (56%, compared with 46% of car drivers), followed by building more town and city bypasses (53%, 36% of car drivers) and introducing more speed cameras (39%, compared with 53% of car drivers). Despite their comparatively good record in terms of speeding, only 7% thought reducing speed limits on motorways or dual carriageways would address safety issues successfully.

- Ends -

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