



LEX
SERVICE

The 1999 Lex Report on Motoring

The authoritative
research on the
attitudes and
behaviour of
Britain's motorists

11th EDITION

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January 1999

The 1999 Lex Report on Motoring

1 Understanding car dependency

2 The desire for change in how we travel

3 The real impact of the Transport White Paper

4 A fair deal for today's teenagers, tomorrow's motorists?

5 - 8 Overview on car ownership and retailing

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DEPARTMENT OF THE ENVIRONMENT,
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The last twelve months have marked a turning point in transport policy. In the White Paper, *The New Deal for Transport*, we set out our programme for providing a transport system that is safe, efficient and clean; and that serves us all, fairly.

Our aim is to provide real choice for all transport users. That means that we want people to be able to choose not to depend on their cars. But it also means that for those journeys for which the car remains the most suitable transport, motorists should be able to get to their destinations safely and quickly.

The success of our policy depends on partnership: between local and national government; between public and private sectors; between transport providers. It is founded on the common acceptance that we cannot carry on as we are; that if congestion and pollution are permitted to grow unchecked the benefits of car ownership perceived by previous generations will not be extended to the next and all of us, along with future generations will have to live with the consequences. It is therefore crucial that we both continue to listen to the views of transport users and to enter into dialogue with them so that we can move forward together towards a modern and sustainable transport system. And it's equally vital that we communicate the wider impact of transport on our lives. Transport affects our health and the health of our children. It impacts on the life of our communities and the competitiveness of our businesses.

That is why, after ten years, the Lex Report continues to play such an important role in the transport debate. Cars and car users will remain central to transport strategy and this report provides a valuable insight into the expectations and experiences of today's motorists, and of the road users of tomorrow.

There are many important findings in this report. The Government will carry on listening to motorists and other transport users, to make sure that the integrated transport system to which we are committed develops in the way which best meets the needs of people across the country.

JOHN REID
Minister of Transport

Introduction by the Chairman of Lex Service

When we first published the Lex Report on Motoring in 1989, we were at the height of an economic boom. Consumer and business confidence were at an all time high. The car was a symbol of our success, car sales were soaring and the car was at the heart of our national transport policy.

Ten years on, having gone through an economic cycle, people have learnt their lessons. Consumers, businesses and government are being prudent, protecting themselves against the chance of the down turn which may be around the corner. The car industry, in particular, is in good shape and will, we believe, cope well with any slow down in 1999.

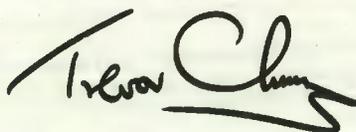
Over the last ten years the environment has moved to the heart of government policy and environmental considerations have clearly influenced the government's White Paper - "A New Deal for Transport". While the motoring public has deep sympathy with the environmental cause and the principles behind the White Paper, they pay high motoring taxes and see few benefits of this money being invested in improving the quality of the road network or providing a viable public transport system. They are also saying to us "keep the environmental debate in perspective, it is important, but not as important as health, education and jobs".

Our concern is that the detailed policies may have unidentified consequences - motorway tolls will drive motorists onto lower quality roads and increase accidents, congestion and pollution. Work place parking tax will lead to increased parking in residential areas. We are concerned that adequate provision is made for poorer and rural communities.

We believe the new government are good listeners. Therefore we urge them to listen to the views of ordinary motorists up and down the country as told to our researchers.

This year's research has been carried out by Sample Surveys who have undertaken our annual survey of Britain's motorists as well as interviewing two hundred teenagers - the motorists of tomorrow - to find out what sort of transport environment they expect. This year, for the first time, we have also employed Research Works to undertake in-depth qualitative research to try and get under the skin of motorists. This has added considerable colour to the quantitative results.

I hope you find the report helpful and useful.

A handwritten signature in black ink, reading "Trevor Chinn". The signature is written in a cursive style with a long, sweeping underline.

Sir Trevor Chinn

Chairman, Lex Service PLC

Lex Call for Action

Using the results from the survey we have put together a transport plan of action. The aim is to develop a safe transport policy which will have popular support as well as being environmentally and economically acceptable.

1. Set demanding standards for transport

An efficient and economic integrated transport system is essential for the well being of the country, both for our commercial and industrial activities as well as the personal lives of the population.

The government should set up a combined office - OFTRANS - measuring the quality delivered by both the private and the public sector in terms of

- quality of roads ● quality of public transport ● quality of environment ● quality of safety

This should set operating standards for all modes of transport and the links between them.

The providers of road services should be under the same pressures as the railways to provide safe and reliable journeys. Roads cannot be ignored in long term transport strategy. We need a strategic road building programme to alleviate predictable congestion black spots to guarantee journey times and to improve the lives of many people in towns and cities. We also need a long term road maintenance programme that is not subject to short term financial pressures and which covers both national and local roads.

2. Raise the public's awareness

The government needs to provide unequivocal information to the public and industry outlining what people can do to minimise their day to day environmental impact, both in motoring and in other uses of fuel.

Can they improve the environment most by insulating their homes, by switching the fuel they use for their car or driving cars with smaller engines?

Tax incentives should be used in a clear and understandable way to encourage the use of environmentally efficient cars. Specifically in the car market we would welcome a star rating for every new car, indicating to the motoring public how environmentally positive their choice of car is.

3. Use technology

The government should create a vision of how the benefits of modern technology such as satellite positioning systems can be used to make our roads work better and to a greater capacity. It should then set clear guidelines and technical standards to ensure rapid implementation and avoid duplication or confusion.

4. Get high polluting vehicles off the road

The majority of pollution is caused by a small minority of vehicles, whether they be cars, trucks or buses. We would recommend introducing even stricter emission controls as part of the MOT test procedure. At the same time, the use of alternatives such as hybrid (petrol/electric) or gas powered vehicles, especially for buses and delivery vehicles in city centres, should be encouraged by fiscal measures.

5. Invest in school buses

Our report has identified the problem of taking children to and from school. Not only does this cause congestion at peak periods, it is self fulfilling. Parents become wary of letting their children walk or cycle to school because of the danger of traffic and concern for their security; they take their children to school by car and the traffic becomes worse.

Our proposal is to invest in more school buses, possibly financed by local business people. Alternatively more use could be made of the 15,000 mini-buses which schools use for outings which are normally not used in the mornings and evenings.

6. Redesign the driving test

We support the plans to make the driving test as relevant as possible to the road conditions that people will face after they have passed their test. Thus it should focus on general driving skills rather than specific manoeuvres and should include motorway driving. We want to see the introduction of compulsory P-plates for a year after people have passed their driving test and for there to be restrictions on engine size and maximum speed during this transition period.

Summary of Motorists' Views

1. Understanding car dependency

The motoring public has a deep reliance on the car, both practical and psychological. The practical reliance is such that without the car, motorists' lifestyles would change dramatically; from work, to leisure, to childcare. The psychological reliance on the car has many facets. For one third of motorists who are car enthusiasts, cars are interesting per se. For the other two thirds the car, or rather the process of driving, is an important time when they are able to relax and be alone. Many people liken driving their car to meditation, whether because it is a passive "time out" or a more pro-active period of enjoyable concentration.

Research on commuting patterns shows that people are very flexible to the impact of future congestion and would put up with much longer daily commuting before they would consider moving house or using alternative transport.

2. The desire for change in how we travel

Motorists express concern for the environment - all other issues being equal. When motorists are probed beyond this superficial concern, the relative unimportance of the environment is clearly demonstrated. Concerns about crime, health, education and jobs far outweigh concerns about the environment. The environmental damage caused by the car is well understood, but is seen as a less significant contributor to environmental problems than many other sources. However, old cars in particular are seen as highly polluting.

Attitudes to public transport are almost universally negative amongst motorists, with the vast majority having no recent experience of either buses or trains. A whole generation has never used public transport and a major education programme will be necessary once the quality has been improved. Few motorists can conceive how public transport can match the advantages of the car, even for a proportion of their travel needs. Motorists recognise their dependence on the car and do not consider it to be a problem.

3. The real impact of the White Paper - "A new deal for transport"

Half the motoring population is aware that the government has published a major review on transport and many motorists support the principles behind the White Paper - "A new deal for transport". However, the level of support for most of the specific ideas put forward by the government is very low. The only ideas with net support are variable vehicle tax and investment in roads and public transport. Public transport is seen as a good idea for other people, but many motorists can not conceive using public transport themselves. Overall, there is widespread opposition to the details of the White Paper and many believe it is a policy suitable for London, but not the rest of the country.

The impact of the proposed policy changes would be negligible for most motorists - they would just put up with the added cost of motoring. With the average car commute taking only 18 minutes, there is considerable tolerance to the effect of congestion on journey times. Motorway tolls are seen as inevitable, with many motorists planning to travel on parallel toll free roads, which could lead to increased accidents, pollution and congestion. Taxing employers who provide parking spaces is widely opposed and is seen as "a disaster in the making" - most people predict that the main impact of this will be to increase parking pressure in surrounding residential areas. The research clearly identified that improving or subsidising public transport will have almost no affect on the travel patterns of motorists.

Motorists predict that in the future they will face more congestion and punitive green policies. They see technology as the main source of future relief from both congestion and pollution.

4. A fair deal for today's teenagers, tomorrow's motorists?

Teenagers are reliant on the car like their parents' generation, although they are more likely to use other modes of transport as well as the car. Many teenagers are interested in cars (especially boys) and almost all teenagers are keen to take their driving test as soon as they are legally able.

They are concerned about the environment and support the main objective of the White Paper to get people to use their cars a little less and public transport a little more. They support more investment in public transport, but oppose restrictions on car use or adding to the cost of motoring. If they were put in charge of transport, the policies most teenagers would introduce are to improve public transport and reduce the environmental impact of cars.

Teenagers support changes to the driving test. They would like the test to be more relevant to everyday driving and less about manoeuvres and would like to see motorway driving as part of the driving test. Many support the idea of wearing P-plates for a year after passing their test and for there to be restrictions on engine size, top speed and motorway driving during this probationary period.

5. Special feature: Women and car buying

Many motorists feel that women still get a worse deal from the motor industry than men - particularly with respect to the car buying process. Those women who are responsible for buying their own cars, however, report levels of satisfaction as high as for male buyers. With respect to servicing, many feel that women get a better deal than men. Men and women report comparable levels of satisfaction with service standards.

Women generally say they feel less confident than men when buying a car, getting their car serviced or arranging finance. The main changes women want from the car industry are to be treated equally and for people to use straight forward, unpatronising language and for their needs to be listened to and addressed.

6. Car ownership and car sales

Car ownership in the UK rose by 0.5 million, with new car sales rising by 4% during 1998. Motorists are predicting that if there is an economic downturn, many of them will respond by delaying the purchase of their next car. If this occurs, it will reverse the shortening of replacement cycles experienced over the past two years. Motorists are more pessimistic generally about their future circumstances and fewer are predicting that they will increase the number of cars in their household in the next two years, but overall an increase is still expected.



The growth in car ownership and the related growth in miles covered by cars over the past fifty years are testimony to the level of dependency on cars that we have as a society.

This year's Lex Report on Motoring aims to get under the skin of that dependency.

What sort of relationships do people have with their cars, is it purely functional or is it deeper than that? How do people feel when they are driving and are these feelings behind their apparent reluctance to change their transport patterns, seemingly at any cost?

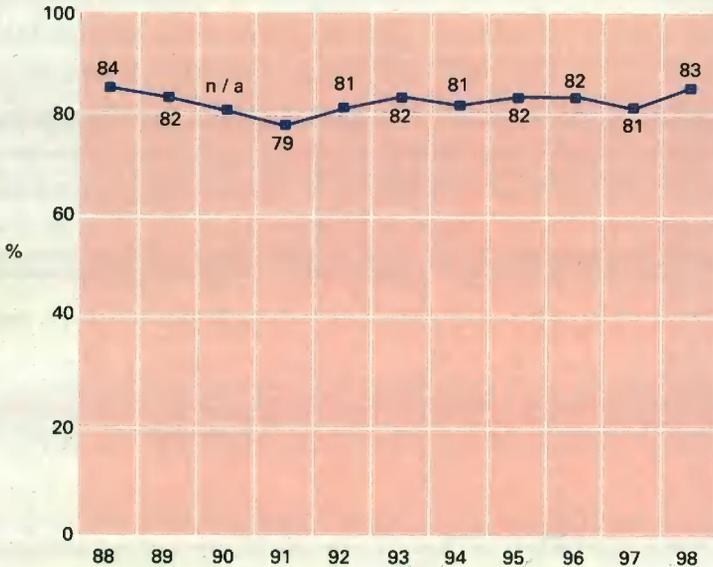
1.1 Different approaches to car ownership

Before trying to identify differences between motorists, it is worth establishing the level of reliance drivers have on their cars. Reliance on the car has been unwaveringly high since the Lex Report first measured it in 1988. In this year's survey 83% of motorists agreed with the statement "I would find it very difficult to adjust my lifestyle to being without a car", compared with 84% in 1988. It is therefore the nature of reliance on the car, rather than reliance itself, that is in question.

Chart 1.1 Reliance of drivers upon the car

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

% agreeing



Base: All motorists.
Source: The 1999 Lex Report on Motoring

Results from both the qualitative and the quantitative research conducted for this year's report, suggest that there are two basic driver types: Functionalists and Enthusiasts.

Functionalists

The 60% of all drivers who agree with the statement "I don't care what I drive as long as it gets me from A to B".

Functionalists drive for practical reasons. They generally claim not to particularly enjoy driving, but are still strongly wedded to the convenience aspects of the car. A number of these drivers could also be characterised as nervous drivers. A typical comment from one of the **Functionalists** was: "I don't love my car, but I wouldn't be without it....."

All demographic groups can be found within this segment; men, women, younger and older drivers. The only really significant difference is between company car drivers and private car drivers; 38% of company car drivers agree with the statement "I don't care what I drive as long as it gets me from A to B", compared with 62% of private car drivers. There are also slightly more women (66%) than men agreeing with the statement (56%).

Enthusiasts

The 31% of drivers who disagree with the statement "I don't care what I drive as long as it gets me from A to B".

Enthusiasts drive for practical reasons, but they also love cars and driving. For them driving not only represents convenience, but is also about peace, relaxation and freedom. Typical comments from **Enthusiasts** included:

"..driving round the country lanes clears my head and helps me relax"

"I love it - the car lets me ride off into the sunset whenever I want"

Enthusiasts are likely to feel a strong emotional attachment to their cars. It is **Enthusiasts** who even go to the extent of giving their car names. It is this group who are also much more likely to associate cars with high status.

Again there is very little demographic bias within this group. The main differences can be noted amongst men and company car drivers, who are both more highly represented in the **Enthusiast** group:

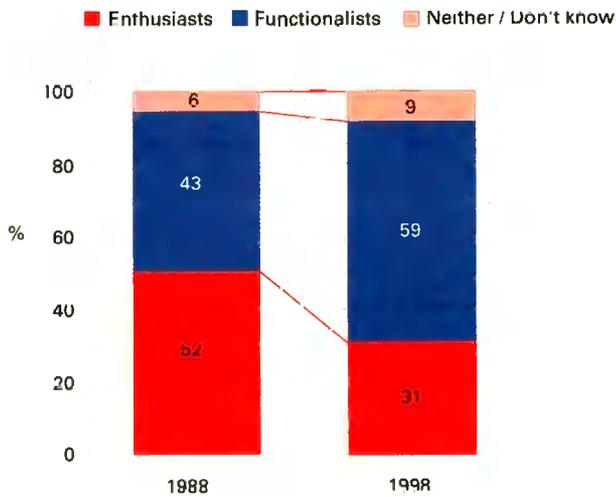
35% of men disagree with the statement "I don't care what I drive as long as it gets me from A to B", compared with 25% of women.

51% of company car drivers disagree with the statement "I don't care what I drive as long as it gets me from A to B", compared with 29% of private car drivers.

There has been a significant switch in driver attitudes over the past ten years, with increasing numbers of people moving from the **Enthusiast** to the **Functionalist** category (or those who are neither one thing or another). In 1988, 52% of people could be categorised as **Enthusiasts**, compared with 31% of people in this year's survey.



Chart 1.2 The decline in car Enthusiasts



Base: All motorists.
Source: The 1999 Lex Report on Motoring

Lex Comment: Driver types

All the research undertaken for this year's report reflects our desire to get beyond the simple headlines. It is simple to show - and we have illustrated this consistently over the past 11 years - that motorists are heavily reliant on the car.

Nothing has worked to date in curbing car use. We believe this is because the nature of reliance on the car has not been well enough understood or has not been taken into account in planning transport policy. There are very strong psychological as well as practical needs served by the car - even in an age where there is decreasing overt enthusiasm for the car. We need a transport policy that appeals to the public as well as being environmentally and economically acceptable. This will not happen until the real needs, weaknesses and desires of ordinary motorists are taken into consideration.

1.2 The psychology of driving

It has been established that there are two basic attitudes to the car; **Enthusiasts** and **Functionalists**. But what do people feel when they are driving and is this related to how they feel about cars in general?

The qualitative research highlighted how there are two main modes of driving:

- The passive mode of motoring
- The active mode of motoring

The passive mode of driving

For many people, both **Enthusiasts** and **Functionalists**, some of the time that they spend in the car is "time which is just for me". Many motorists value this time as rare moments when they are separated from the rest of the world (including other car drivers) and are cocooned in their car. The emotions and feelings that motorists associate with this mode include:

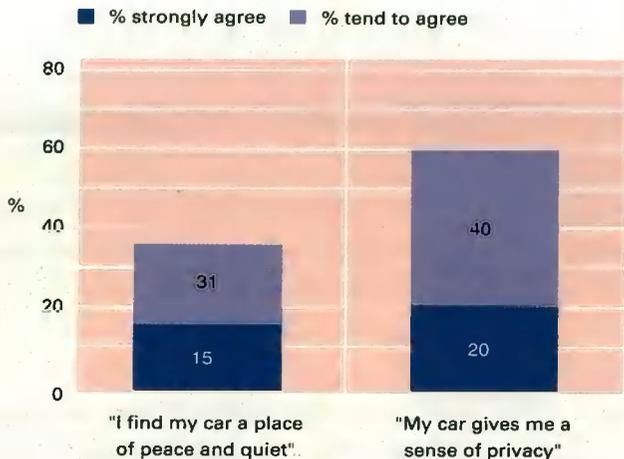
- Peaceful
- Quiet
- Relaxed
- Insulated
- Private
- Meditative
- On automatic

46% agree with the statement "I find my car a place of peace and quiet". Again more men (49%) and company car drivers (59%) - both higher mileage groups - agree with this statement.

Part of this feeling is of privacy and personal space, offering the chance to think through problems, listen to music or simply switch off and relax. It is a chance to be in control for many drivers.

60% of drivers agree with the statement "My car gives me a sense of privacy".

Chart 1.3 The passive mode of driving



Base: All drivers (1297)
Source: The 1999 Lex Report on Motoring

The active mode of driving

The other major mode of driving is the empowered, active mode. This is about involvement in the driving experience. This is the predominant mode for those who are enthusiastic about driving. In this mode people say they get a "buzz" out of the driving experience.

The type of words that people associate with this mode of motoring include:

- Focused
- Alive
- In control
- Active
- Powerful
- Excited

Both of these modes represent different aspects of individuality. The importance of individuality is reflected in the small percentage of motorists (20%) who agree with the statement "Driving is an opportunity to talk and chat with passengers". Stereotypically it would be assumed that women would be more likely to use the car in a social way, but the research shows men and women to be equally negative about this statement.

Chart 1.4 "Driving is an opportunity to talk and chat with passengers"

	All	Men	Women
	%	%	%
Strongly agree	3	3	2
Tend to agree	17	17	15
Neither agree nor disagree	18	19	17
Tend to disagree	34	32	38
Strongly disagree	27	27	26
Don't know	2	2	1

Base: All drivers (1297)
Source: The 1999 Lex Report on Motoring

Individuality is the core theme running through how people feel about driving; engendering a sense of freedom and independence. This opportunity to express their individual preferences and personality in a unique way was reflected in this comment from the qualitative research:

"I hate it when someone changes something in my car - moves the wing mirror, changes the heating or puts my stuff in the glove department...I've got it just the way I like it..."

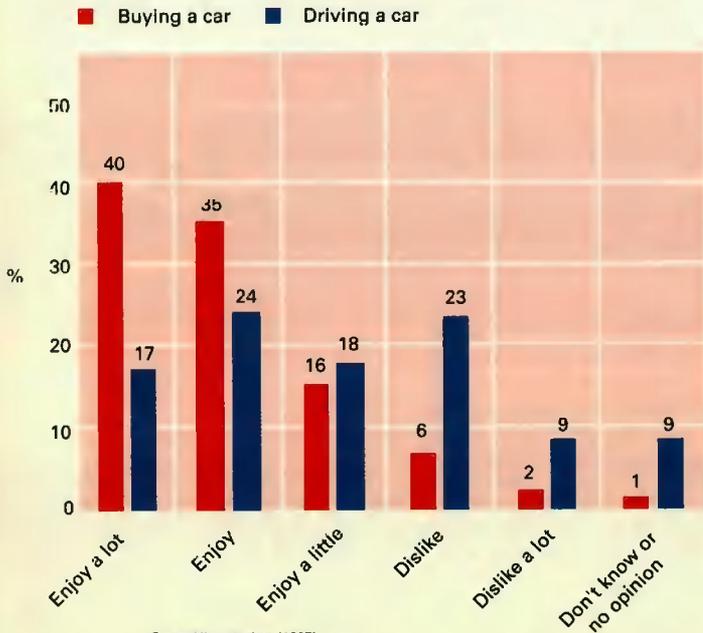
These attitudes are likely to impact upon the success of any car sharing initiatives.

How much do you enjoy owning a car...?

The level of enjoyment of driving a car is generally very high, with 75% saying that they enjoy it a good deal, but there are 40% of motorists who are really passionate about their driving - these figures are very similar for both men and women.

The level of enjoyment is much lower with respect to buying a car, with just four in ten saying they enjoy this process to a significant degree and just one in six saying they enjoy it a lot. Men (46%) are more likely to enjoy buying a car than women (33%).

Chart 1.5 Level of enjoyment of driving and buying a car



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Lex Comment: The psychology of driving

This chapter has illustrated one of the core needs people have in modern life - the need for calm, peace and tranquillity - and it is these needs that many motorists believe public transport can not fulfil. In a life that is stressful for many, despite all the concerns about road rage and congestion, the car provides a cocoon - isolation from the problems waiting at the end of the journey. For others, or even for the same people on a different day, motoring offers a different, more active form of escapism. This feeling of power and control that the car gives many people - whether it is thought to be a good thing or not - is very difficult for public transport to replicate.

Public transport can offer thinking space, but with the expectations of cleanliness, comfort, security and warmth that the majority of car drivers experience in all aspects of their life, there is an almost insurmountable barrier to trial of public transport. Not only does the quality of public transport have to reach new, almost unimaginable heights if it is to succeed, but an enormous communication task needs to be mounted to win over the hearts and minds of motorists.

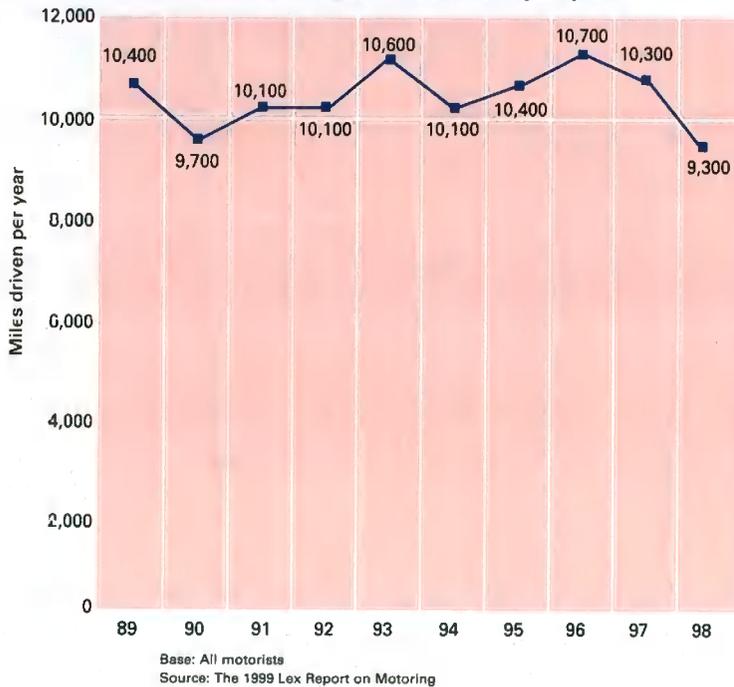


1.3 The nature of reliance on the car

It is indisputable that drivers are heavily reliant on their car and that this reliance is as strong if not stronger than it has always been. 85% of the motorists interviewed in this year's survey drove every day or most days, with most of the rest driving two or three times a week. An increasing number of the general public are regular drivers - in 1991, 56% of *all adults* drove every day or most days, rising to 59% in 1997.

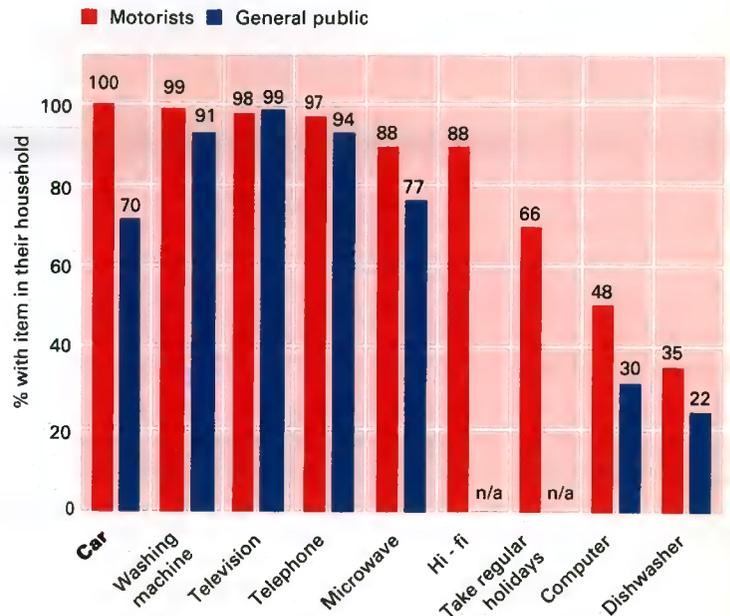
People continue to cover as many miles per year in each of their cars as they have done since the Lex Report started. This mileage figure has remained consistent as the economic cycle has waxed and has been unaffected by rising congestion and the increase in the proportion of multi-car households. On average, the number of miles driven per motorist this year was 9,300 miles, slightly down from last year.

Chart 1.6 Average miles driven per year



A comparison of reliance on the car relative to other household items was made by respondents in this year's survey. They were asked about commonly owned durables such as washing machines, televisions, telephones, hi-fi's and microwaves and also about newer items such as computers and dishwashers. As a final comparison people were also asked about their feelings about regular holidays.

Chart 1.7 Ownership of household durables



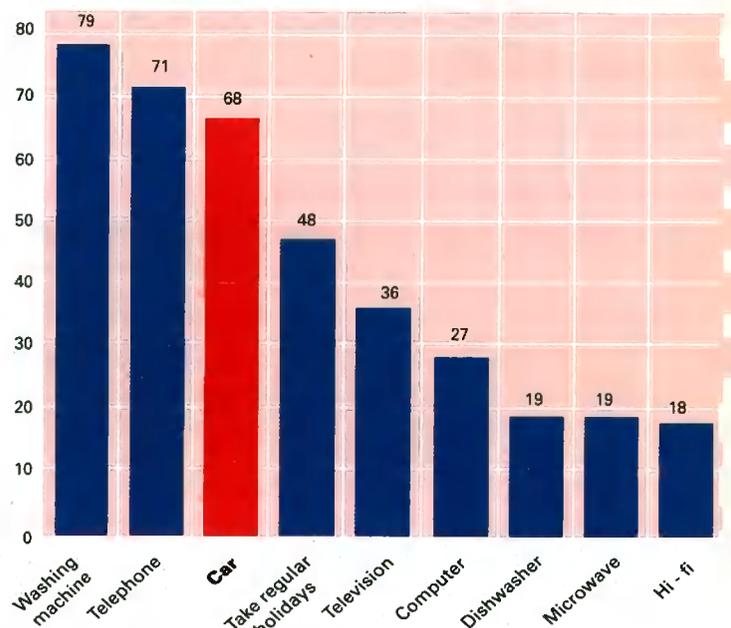
Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring, Family Expenditure Survey (ONS), General Household Survey

It can be seen that there are a number of core durables that almost all motorists have in their life: cars, washing machines, televisions, telephones and increasingly microwaves and hi-fi's. Two thirds of motorists take regular holidays, whilst just under half of motorists own a computer and a third have a dishwasher. Ownership of durables amongst motorists is higher than for the public as a whole, reflecting the higher average income levels of motorists.

Those motorists who owned these durables were then asked how reliant they were on these items or activities.

Chart 1.8 Reliance on household durables

% of all those owning who say it is "absolutely essential in their life"



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Amongst these nine items there was a clear hierarchy of importance:

- Washing machines, telephones and cars are essential in modern life
- Holidays, televisions and computers are important but not critical for most people who own them
- Dishwashers, microwaves and hi-fi's are just nice to have (but inessential) for most who have them

There were some clear demographic differences in how important these items were to people:

- Cars and home computers were essential to more company car drivers
- Washing machines and dishwashers are essential for a slightly greater proportion of women
- Television is important to more men
- Hi-fi's are essential to more young people
- Regular holidays are important to fewer young people

Reactions to losing access to a car....

The clearest illustration of the reliance and dependence of many motorists on their car emerged from the qualitative research, when respondents were asked how they would react to losing their car. Most motorists were unable to frame their views on this issue - most felt they would "move heaven and earth to get another", but almost all respondents thought that losing access to a car would be "disastrous".

- In many cases their first reaction related to work: "How would I get there?...how could I do my job?"
- For parents, concerns focused around getting their children to school and activities: "That would be the end of lots of things...they'd spend a lot more time at home"
- Many made frequent visits to friends and family and most believed that they would make far fewer visits without a car: "My mum wouldn't see me anywhere near as often..."
- They felt that their leisure time would be severely curtailed and that everything they currently do easily would be much harder to achieve: "I could stick it for a little while and then I'd have to do something...life's too short to spend on buses and trains and at home..."
- General quality of life would be significantly reduced - convenience, independence and a sense of freedom were the aspects of life that would be most missed: "I'd rather move and go into a flat than not have a car. I could cope with less bedrooms but not without my car."

How is reliance defined.....?

Whilst the car can be shown quantitatively to be important to the vast majority of drivers, the qualitative research showed that reliance can actually be defined in two different ways:

1. The lifestyle aspects of reliance on the car: freedom, independence, convenience, comfort and status.

These relate to the complexities of people's life and behaviour patterns. These behaviour patterns are complex and are difficult to change or even to get people to want to change them.

2. The psychological aspects of reliance: privacy, space and relaxation.

The lifestyle aspects of reliance on the car are much more about how people see themselves and how they believe other people see them. The psychological aspects of reliance are much more about "time out" - a time for re-charging the batteries.

These psychological aspects of reliance on the car tend to be introspective and personal. Respondents in the qualitative research likened it to the relaxation that is achieved when you are really concentrating on a favourite hobby, whether it is fishing, crafts or music. In sporting terms it is equivalent to being "in the zone".

Chart 1.9 Practical motoring or fantasies come true?

"If you were given one of the following options which one would you choose?"



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

%

In a more light-hearted vein, drivers in motoring households were asked whether they would prefer to be given a series of motoring give-aways or other delights such as a year's supply of Viagra, a week in the Caribbean or a date with a film star of their choice.

As can be seen in chart 1.9 the British motoring public are largely led by their heads and not their hearts. The most popular option by far was free fuel for a year (53%) . One in five would opt for a trip to the Caribbean. Only 8% would opt for congestion free streets and only 1% would opt for a date with a film star, possibly reflecting the fact that less than 0.5% felt in need of any Viagra.

Younger people were less pragmatic than older drivers. They were much more likely to want the use of a Ferrari for a month (9%) or a date with a film star of their choice (3%). Older people are more likely to go for congestion free streets (10%) or a year's supply of free fuel (59%).

Lex comment:

The nature of reliance on the car

The car is at the heart of everyday life, as intricately woven into the fabric of modern day Britain as the telephone and the washing machine - it is impossible to do without for most people who own one. The evidence from the qualitative research, showing the psychological nature of reliance on the car, indicates the enormity of the government's task to get people even to want to leave their cars at home. More worrying from the motor industry's perspective is that a full tank of petrol is more motivating than a free Ferrari and from the environmentalist's perspective that most drivers would rather have a full (but free) tank of petrol than congestion free streets. The government can rest easy with respect to the NHS drugs bill, however, with less than one in two hundred motorists lured by the prospect of free Viagra on tap.



1.4 Understanding commuting patterns

As part of the study of reliance on the car, this year's research has looked in detail at the nature of commuting; how far do people commute, why do they live where they do and how much congestion will they put up with before moving house or moving job?

Length of time in current home...

Most people have lived in the same house for a long time. The average length of time is approximately 10 years. Over half of motorists have lived in the same house for over 10 years or since they were a child. There are relatively few people who are new to the house in which they live (just 13% of people have lived in their house for less than 2 years).

There are very marked differences between younger people and older people. Three quarters of drivers over 55 years old have lived in the same house for over 10 years. This compares to just 17% of drivers under 35 years old. The unresolved issue is whether this is because of lifestage - i.e. younger people will move early in their life and then stay put as earlier generations have done - or whether it is because younger people are more mobile than previous generations.

Chart 1.10 Length of time lived in the same house

	All	Under 35 years old	35-54 years old	55+ years old
	%	%	%	%
Less than 2 years	13	20	11	6
2-5 years	15	23	15	7
5-10 years	15	18	19	7
10+ years	46	17	46	75
Since I was a child	11	21	9	5

Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Reasons for living in the area...

When asked what the motivations were for living in a particular area, the reasons could be split in to:-

1. Positive choices i.e. the attractive nature of the area or the house, or the quality of the local facilities
2. Habit i.e. because they have always lived in a place or because of friends or relatives in the area
3. For work related reasons

The reasons differed little between people who had lived in their house for under 10 years and those who had lived in their house for over ten years. Long term residents were more likely to quote habitual reasons and shorter term residents slightly more likely to express reasons of positive choice, but the differences were small.

Chart 1.11 Reasons for living in the area

	All	Lived in house under 10 years	Lived in house over 10 years / Lived in house since a child
	%	%	%
Positive choice of the area			
Like the area	28	27	28
Convenient locality	9	10	9
Peaceful/quiet	8	10	7
Type of property I wanted	7	11	5
Cheaper houses	5	6	4
Better environment/ quality of life	4	3	4
Good schools	4	5	2
Good amenities	3	2	3
Near good road links	2	2	2
Near to public transport	2	2	1
Habitual reasons for living			
Have always lived here	13	6	18
Family live in area	12	10	14
Family reasons	4	4	4
No choice-rehoused	4	6	3
Friends live here	4	4	3
Live with parents	1	1	2
Work-related reasons			
Near work	11	12	11
Work reasons	10	10	11
Easy commuting	1	2	1

Base: All drivers (1297)
Source: The 1999 Lex Report on Motoring

Most people have made a positive choice about the area they live in. Relatively few state their prime reason for choosing the area to be related to work and work location. Perhaps the oddest reason given was from the person who said "It looked nice on a calendar".

Average journey time to work...

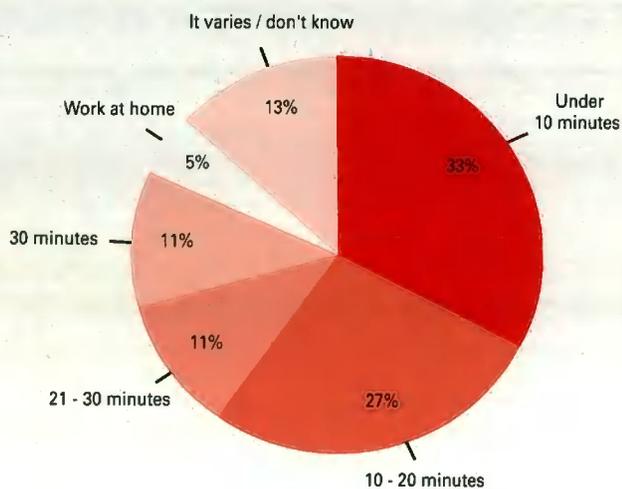
On average it takes those motorists who work 18 minutes to commute each day, although the most common length of journey is between 6 and 10 minutes. There are a significant number of people who travel relatively long distances - 12% travel for more than 30 minutes each way to and from work.

There are distinct differences in the average commuting times of different demographic groups:

- On average men commute 21 minutes each way, compared with 15 minutes for women
- Company car drivers commute 24 minutes each way, compared with 18 minutes for private car drivers
- Motorists in London and the South-East commute 22 minutes each way on average, compared with 15 minutes in Scotland and just 14 minutes in Wales and the South-West

The average length of commute for the general public as a whole is six miles, with 70% per cent of journeys being made by car (Source: National Travel Survey 1994/6).

Chart 1.12 Length of time it takes to get to work



Base: All drivers currently working either full or part-time (865)
Source: The 1999 Lex Report on Motoring

Why not live closer to work...?

All those who worked more than a 10 minute journey from work were asked why they did not live closer to work. The reasons were similar to those given for why they chose the area in the first place; either positive attraction of the area or because they have always lived there. A small minority (7%) liked to keep home and work separate. Nearly three in ten had never thought about it.

There was little difference in these reasons for motorists with long commutes and those with shorter commutes. Longer commuters were slightly more likely not to have moved closer to work because they liked the area or because they wanted to separate home and work. Shorter commuters were more likely never to have thought about it.

Chart 1.13 Reasons for not living closer to work

	All	10-20 minute commute	Greater than 20 minute commute
Positive choice	%	%	%
Like the area	28	25	32
Easy journey	6	7	4
Good housing	7	6	8
Good schools	7	7	8
Good leisure/entertainment	1	*	3
Good shops	1	*	1
Habitual reasons			
Never thought about it	27	30	23
Have always lived here	16	16	16
To be near friends/family	8	6	11
Don't know	6	7	5
Work-related reasons			
Like to separate work & home	7	4	11
I work from home	1	*	1

Base: All those who have more than a 10 minute commute to work (424)
Source: The 1999 Lex Report on Motoring

How much longer are commuters prepared to travel each day...?

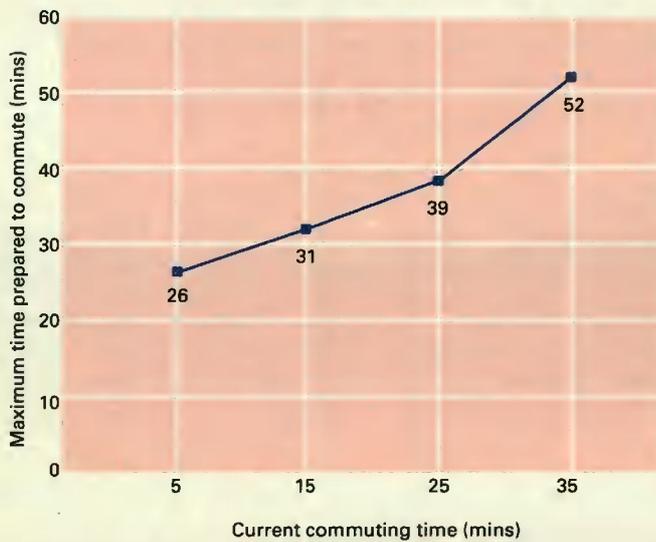
One of the critical issues for transport planners is whether commuters would want to move closer to work if congestion got worse, or whether they are insensitive to changes in commuting times. The research suggests that most people live where they do because they have deep roots in the area or because they have made a positive choice to live there, rather than choosing a location on the basis of their commute.

To test this further, respondents in this year's research were asked what would be the maximum amount of time they would be prepared to travel to work. On average, they would be prepared to travel for nearly twice as long as they do currently - up to 35 minutes on average. This elasticity with respect to commuting time is further highlighted by the strong correlation between current commuting time and

the maximum they would be prepared to put up with. The longer people commute currently, the longer they would be prepared to put up with.

In last year's research, commuters were asked what they would do if congestion caused their journey times to work to double. Most (67%) said it would make no difference to their journey patterns or they would just leave more time. The majority of the rest (23%) said they would find an alternative route. Just 7% said they would switch to public transport under this scenario.

Chart 1.14 Maximum time prepared to commute



Base: All drivers who currently work either part time or full time (865)
Source: The 1999 Lex Report on Motoring

Lex comment:

Understanding commuting patterns

This section has highlighted one of the major transport dilemmas. Motorists are sympathetic to the environmentalists' cause, but to change their behaviour in response to these concerns requires major lifestyle changes. People do not choose their home on the basis of the length of their commute. Most people live quite near to work and live where they do because they like it or because it is where their roots are. With most people having relatively short journeys to work, there is a long way to go before congestion impacts upon where they choose to live or the location of their job. For most people, in most jobs, in most towns in Britain, plans to charge for travel into town centres or for work place parking is an inappropriately big hammer for a relatively small (albeit irritating) nut. For most people car-related problems are not that bad on most of their journeys. This is not an excuse to do nothing, but should indicate that there is time to look for long-term alternatives and for long term ways to minimise the damage caused by car use, not just to seek the easiest short-term response. The easiest response is to increase the cost of motoring, which is taxing people for using the most practical (or only) option for everyday travel.





The desire for change in how we travel

SECTION TWO

Before examining the relative acceptability of solutions to the “problem” of car use in Britain today, the research aimed to identify the extent of the problem from the perspective of the motorist. In particular it looked at their concern for the environment and worries about congestion.

The research also aimed to establish the current acceptability of public transport versus the car.

2.1 Concern and responsibility for the environmental impact of the car

When motorists are probed beyond their superficial statements of concern about the environment, the qualitative research suggested that the real level of environmental concern is actually quite low.

Motorists clearly appreciate the environmental problems that cars create. These general arguments are well rehearsed and have been covered in detail in the media. Although there is this overall understanding of the environmental problems caused by the car, detailed understanding - about CO₂ emissions for example - is less widespread. Many motorists feel that they have "done their bit" by using lead-free petrol and that to an extent the problem had been "solved". There is also a clear sense that it is not the fault of the individual motorists, one respondent commented: "it isn't fair...it's not me that's to blame".

There is more environmental concern amongst older and female drivers, who were worried about the quality of life for those living in the country. Younger drivers were much less concerned about the environment and had a "get real" attitude, in particular supporting more road building.

"Who cares about a few ducks and woods, we need the roads now...."

The rationale for the anti-environmental sentiments that respondents expressed were normally based around the argument for the economic necessity of better roads:

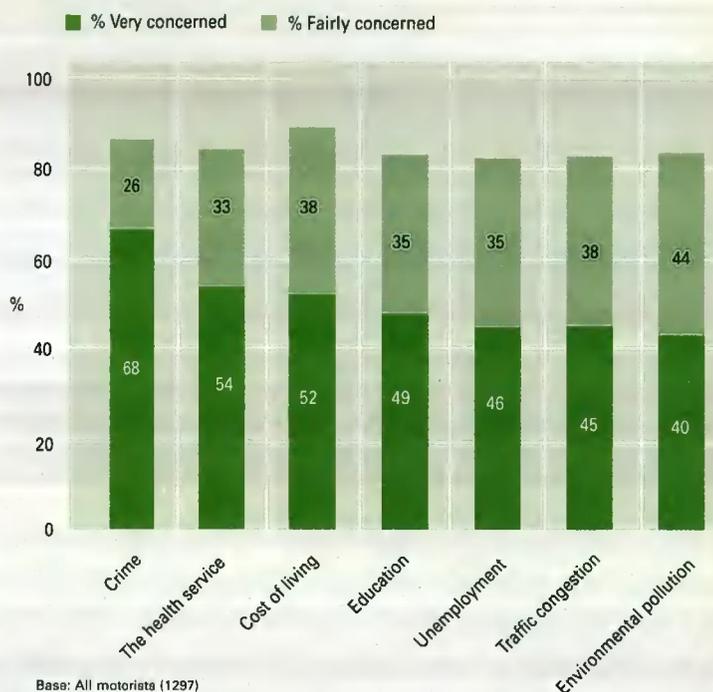
"No one can enjoy the countryside if they're broke, can they? If you can't do your job then you simply sit at home and you don't care about anything..."

The environmental damage the car may or may not cause is unlikely to change the car driving behaviour and attitudes of most individual motorists. Many motorists feel personally helpless about environmental problems and do not want to be "early adopters" in changing their travel patterns.

The relative importance of the environment...

The relative unimportance of environmental issues in the wider context of people's lives was highlighted when respondents were asked how concerned they were about a number of social issues.

Chart 2.1 Level of concern for social issues in Britain



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

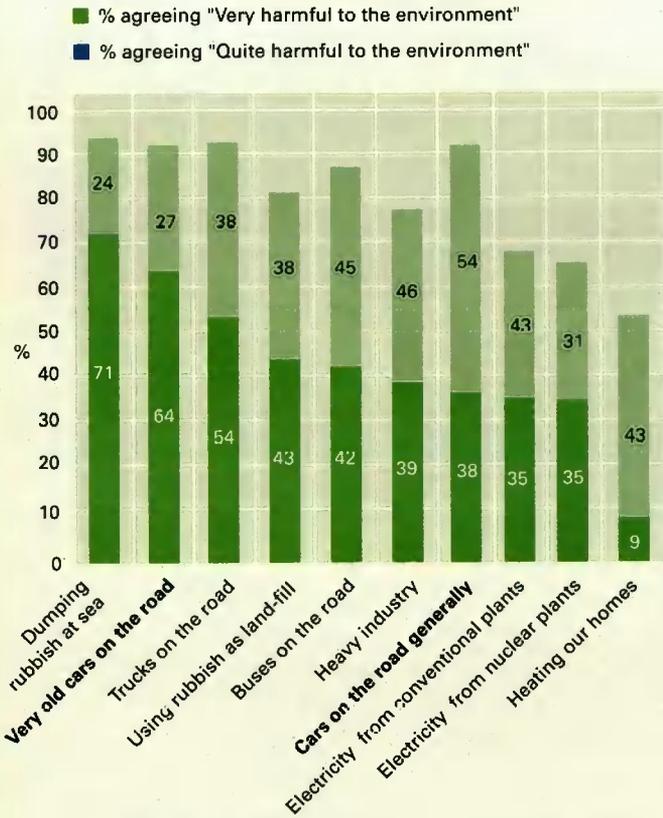
Environmental pollution is something a lot of people are quite concerned about, but something that relatively few people feel passionate about. Crime tops the list of concerns - particularly for older people. Next most important is the health service, especially for women and older people. Education is important for a large number of younger people.

The two car issues on this list were congestion and pollution. They were bottom of this list of concerns, with congestion of slightly more concern than pollution.

The perceived causes of environmental damage...

Respondents were then asked the degree to which a number of potential sources of pollution were harmful to the environment. Cars, in general, are seen as relatively benign from an environment perspective. For example, fewer people think cars are environmentally damaging than think land-fill and heavy industry are harmful to the environment. It is old cars on the road that people believe are the main cause of environmental problems with respect to the car, although a significant number also think trucks and buses are "very harmful to the environment".

Chart 2.2 Contributions to pollution



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

There are stronger, deeper felt attitudes towards congestion, because it effects more people on a regular basis and the causes are well understood:

"There's so many three or four car households now...everyone wants their own car"

In a society where many people are operating under severe time pressures, congestion is widely despised:

"It's no fun driving around here these days, you just sit in traffic all day..."

There was little sense of motorists being personally responsible for congestion and many shifted the blame to an anonymous hand of "planners", who had failed to anticipate and respond to future traffic needs. Many respondents, particularly male drivers, felt that school-related trips were largely to blame for rush hour congestion and that a safe, reliable school bus system would improve the roads significantly.

Many respondents also felt that the government was to blame for many of the congestion problems, in that huge

amounts of vehicle tax were being collected but were not being spent on alleviating congestion. In particular it was felt that tax revenue was not being spent locally.

Lex comment:

Concern and responsibility for the environmental impact of the car

The environmental debate needs to get key issues in to perspective. The environment is important, but it is not as important as jobs, health and personal safety. These are the key issues that people want addressed, the issues that touch their everyday lives. Congestion does touch all motorists lives and it is this that makes it more important than air pollution to most motorists. It is also clear from the research that the motoring public do not have a clear view on the relative environmental damage caused by different energy producers and consumers. Very few people believe heating their homes is a major cause of environmental damage for example, when it is actually an area where major improvements can be made and where individuals can make a real difference without having to change their lifestyles. Motoring and all other modes of transport only account for a third of all the energy used in this country. It is also clear that there is widespread public support for the Lex campaign to get older, higher polluting cars, buses and trucks off the road and for greater investment in school buses.

Many motorists feel enough is enough with respect to congestion. They feel the government are taking their motoring taxes and doing very little to improve their motoring lives. There is a clear sense that the pendulum has swung too far towards the environmental extremists and that ordinary people are suffering as a consequence. In the words of one of the younger respondents in this year's survey, the government need to "get real".

2.2 The benefits of public transport

Respondents in the qualitative research were asked what they felt about public transport.

Overall, respondents struggled to find good things to say about public transport, quite often because they never or hardly ever used public transport. What positives they could state were largely limited to train travel, while there were virtually no positive comments about buses, which were seen by many motorists as a primitive “almost medieval” form of travel.

The positives they were able to generate about public transport were developed in the abstract, with little personal experience or real belief in them.

Benefits of public transport

- Relaxing/no stress
- Less chance of accidents
- No parking worries
- You can eat or drink more pleasantly
- You pay as you use it
- Environmentally friendly
- Gets you to city centres easier than a car
- Can work whilst travelling
- No drink-drive worries
- Healthier/more social

Motorists in the qualitative research found it much easier to talk about the negatives of public transport. There was significant anxiety about travel on public transport in general, but whilst respondents were luke warm about train travel, they were positively hostile towards bus travel. There was a very strong sense that current public transport is not even close to providing a realistic alternative to the car.

Negatives of public transport

- Unreliable/unpredictable
- Dirty/unclean
- Complicated, not direct
- Time consuming, slow
- Not user friendly - tickets/information
- Uncomfortable - no seats
- Inconvenient - not door to door
- Unsafe
- Expensive (although no one knows how much)
- Unfriendly staff and passengers
- Being exposed to the vagaries of the weather
- Constrained by limitations of timetable

Lex comment: The benefits of public transport

Motorists' perceptions of public transport could hardly be lower. This is the reality that needs to be dealt with by public transport operators and their regulating authorities and funding providers. There is a massive barrier to motorists trialling public transport. It is inevitably a long road to get people to change their behaviour, but whilst there is widespread scepticism that public transport will ever be able to deliver, there is at least a strong sense of goodwill towards public transport and a feeling that it is a “good thing” (if it can deliver on the basics). Small changes to regulations and transport management will not create the conditions for the step change in attitudes and behaviour that is required. If the government is serious about getting the motoring public to leave their cars at home, at least some of the time, then long term, high investment in public transport is needed.



2.3 The benefits of car travel

In contrast to the views motorists had of public transport, the respondents found it very easy to be positive about the car and less easy to be negative. The most important positives associated with the car were privacy, independence and convenience, as highlighted in section 1. Many respondents saw the car as a potent symbol of their own freedom and individuality.

The convenience and comfort factors associated with the car have become so ingrained in day to day lifestyles that changing would involve fundamental switches of behaviour, expectation and attitude:

"Access to anywhere is in your pocket in the form of a key..."

Overall, virtually all respondents felt they were totally dependent on their cars and were not worried by that dependence:

"I don't know what I would do without it...I couldn't live my life normally at all..."

"This is a car society...they'll never change that now.. we've all had a taste of it.."

The benefits of car travel

- Door to door convenience
- Independence and freedom
- Comfortable environment
- Enjoyment/pleasure
- Safety (from violence)
- No worries about the weather
- Flexibility of time and route
- Privacy and personal space
- Status and fashion
- Allows carriage of luggage and children

Motorists also recognised that there were down-sides to the independence, freedom and convenience the car brought, particularly congestion and pollution. Other negatives were rational perceptions of the problems associated with the car such as cost, safety and the environment. All of the respondents could think of a few bad times in their cars, but they felt that these were completely offset by the majority of driving time, which was viewed positively.

The negative aspects of car use which respondents found most upsetting were those which could reduce some of the core benefits of car use - comfort, convenience, privacy and security. In particular people were concerned about the impact of vandalism, theft and road rage. People felt that these destroyed their peace, isolation and personal space and reacted in quite an extreme manner, some even likening these offences to rape. These fears are why many motorists no longer keep anything of any significant value in their cars.

The negatives of car travel

- Congestion and traffic jams
- Road safety and accidents
- The cost of motoring
- Pollution and environmental damage
- Can be lonely
- Road rage
- Tiring and stressful journeys
- Parking
- Vandalism and theft

Lex comment: The benefits of car travel

In one sense the motor industry could be forgiven for sitting back on its laurels and congratulating itself on reaching an almost impenetrable position of dominance in the domestic travel market. But....it has achieved this position through a process of continuous improvement forced upon it by high levels of competition. Consumers are conditioned to expect these improvements and without it market share would quickly be lost, as manufacturers are well aware. The real challenges and opportunities in this competitive race are in the retail sector, where we believe service standards can still be improved significantly.

It was noticeable in the research that motorists are not that passionate about their car unless the issue of their personal space in the car is threatened. Under these circumstances very emotive language is used. People want protection from vandalism, theft and road rage, much more than they want faster, safer cars - where, as we will show later, motorists' needs are largely satiated.





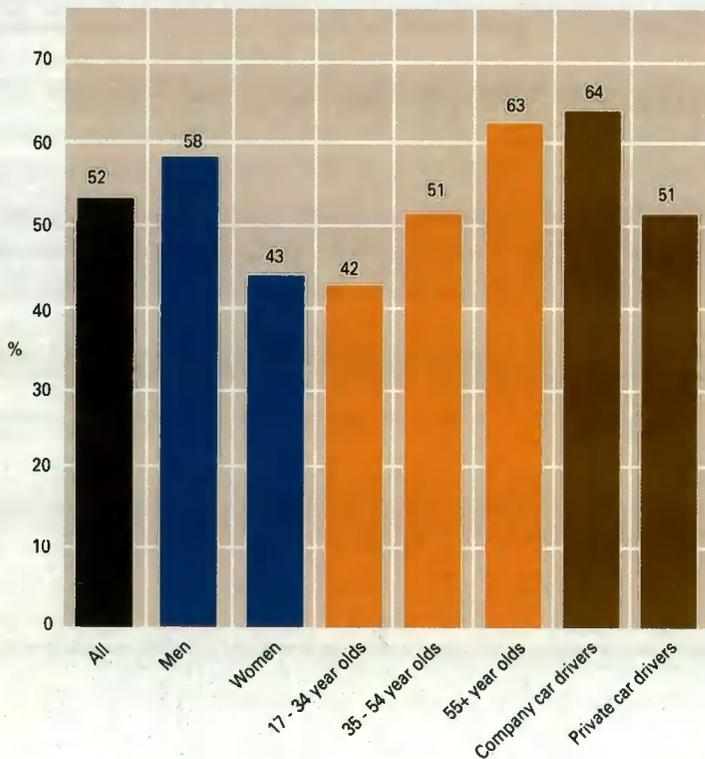
In this section, the 1998 White Paper: "A new deal for transport: better for everyone" is examined from a number of different angles; are motorists aware of the report, do they support the principles behind the report, what do they think of specific policies and, most important of all, what impact do motorists think it will have on their lives?

3.1 Awareness of the White Paper

The White Paper: "A new deal for transport: better for everyone", published in June 1998, was the first strategic review of transport for a generation and, within the industry, its publication was awaited with a mixture of excitement and trepidation.

About half of the motoring public was aware of its publication (52%). Awareness was significantly higher amongst men, older people and company car drivers.

Chart 3.1 Awareness of publication of the White Paper



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

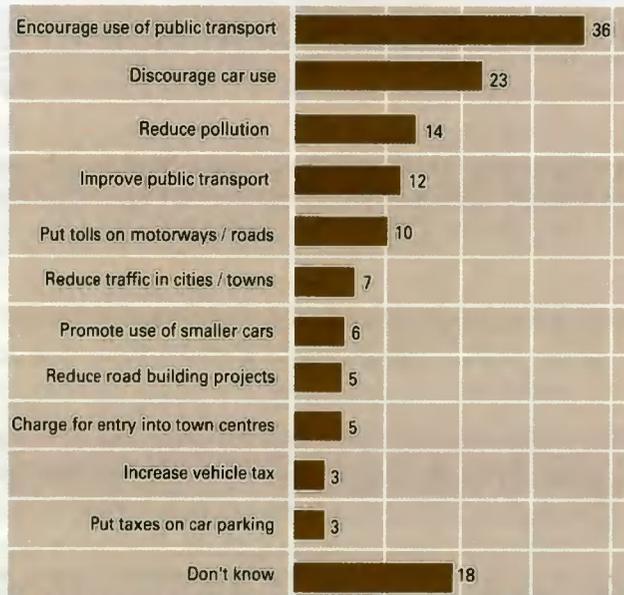
Those who were aware of the publication of the report were asked what they thought the main themes of the government White Paper were. One in five were unsure what was contained within the report, but amongst the others the most common responses were at the general level - to encourage use of public transport and discourage use of cars - rather than at the level of specific policies.

The most widely recalled specific policies were: putting tolls on motorways, promoting the use of smaller cars, reducing road building and charging for entering town

centres. There were misconceptions that plans to increase vehicle tax, improve public transport and take older cars off the road were included in the report.

Many motorists thought that the UK government and the EC were anti-car and resented this.

Chart 3.2 Spontaneous awareness of themes in the White Paper (main responses)



Base: Car drivers aware of major review of transport (680)
Source: The 1999 Lex Report on Motoring

Lex comment: Awareness of the White Paper:

We at Lex welcomed the government's strategic review of transport policy and applaud much of its content. The government, however, appears to have made a relatively small splash with the public with the launch of the White Paper. Those motorists who read or heard about the report did not pick up many of the specific ideas it contained, perhaps because there was not one big theme that emerged. What has been picked up by the motoring public is that the government, and its partners in Europe, are anti-car. There is a clear sense that motorists are being picked on as an easy target for increased taxes. Whilst the environmental argument against cars has held sway for a long time, motorists have had enough and feel that they more than "pay their way" already.

3.2 Support for the principles of the White Paper

Sections 1 and 2 demonstrated how reliant people are on their cars and also that there is an underlying apathy amongst many motorists with respect to the environment and the use of public transport. Chart 3.3 demonstrates, however, that many people support the principles and ideas behind the White Paper, even if they do not want policies introduced that directly impact on their individual lives.

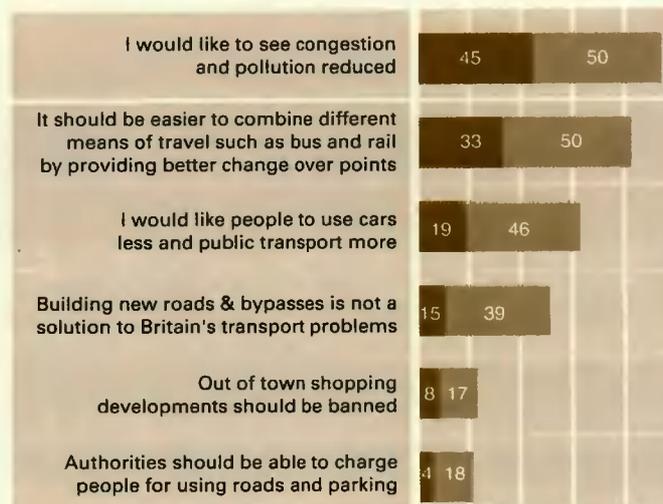
Respondents were asked how much they agreed or disagreed with a series of statements. These statements represented many of the principles on which the White Paper was based. Respondents were not told that these statements were related in any way to the White Paper. Of the six statements presented to them, over half agreed with four of the statements, although there was only strong support for the first statement:

- I would like to see congestion and pollution reduced
- It should be easier to combine different means of travel, by providing better change over points
- I would like people to use their cars a little less and public transport a little more
- Building new roads and by-passes is not a solution to Britain's transport problems

There was very little support for the principles of road charging or for the curtailment of out of town shopping developments

Chart 3.3 Support for the principles of the White Paper

■ Strongly agree ■ Tend to agree



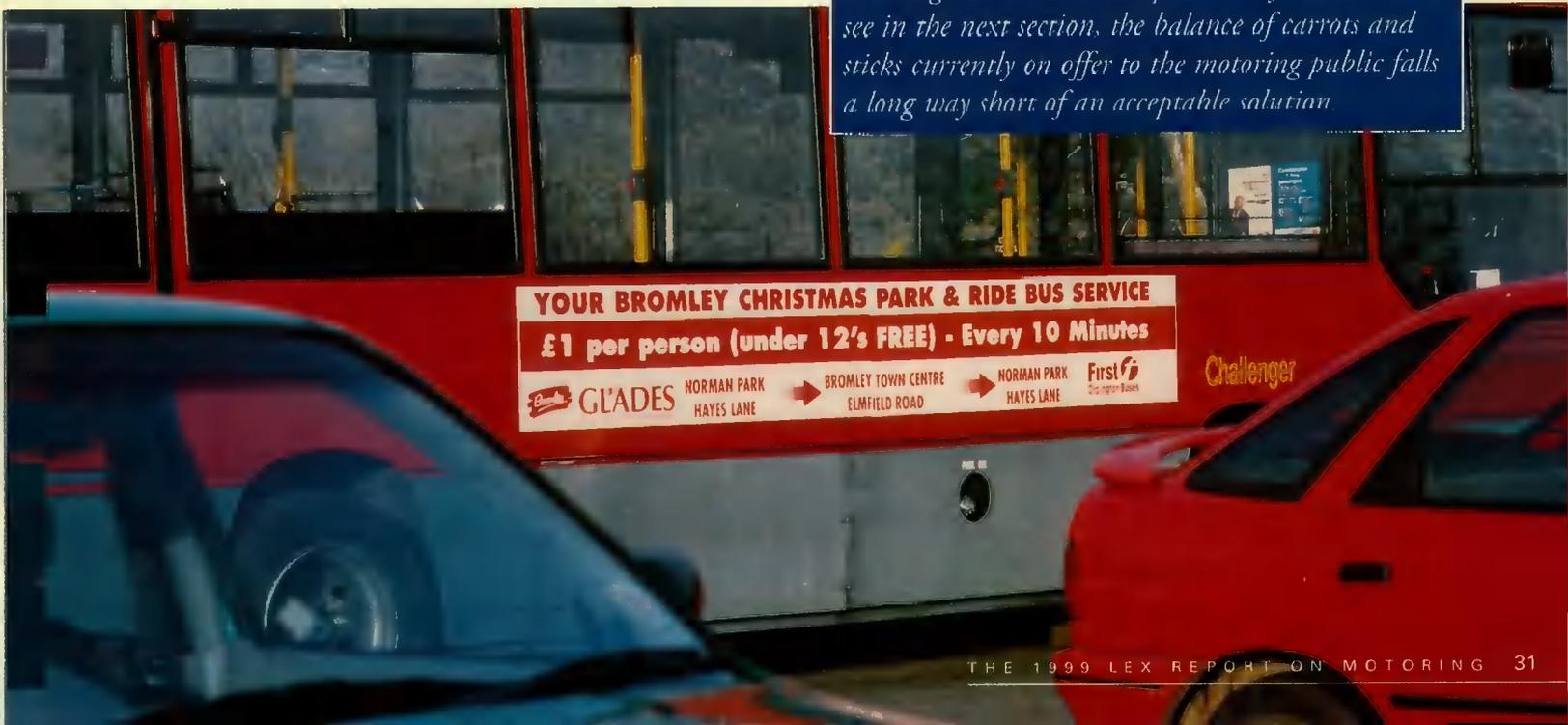
Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

%

Lex comment:

Support for the principles of the White Paper

There is very clear support for most of the principles behind the White Paper. It could be argued that it is easy for people to support principles - this costs them nothing. The acid test is what they think when they are faced with the reality of how those objectives are to be achieved. Whilst we would agree with this to a certain extent - everybody thinks public transport is a good idea for other people! - we believe there is genuine goodwill towards positive change. The challenge is to build on this goodwill in an acceptable way. As we will see in the next section, the balance of carrots and sticks currently on offer to the motoring public falls a long way short of an acceptable solution.



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3.3 Level of support for specific policies

In section 3.2, it was shown that there is reasonable support for the principles behind the White Paper. In this section we look at the level of support for restricting or reducing the amount of car travel in the UK, together with the level of support for specific policies put forward by the government.

Restriction of car use....

Opposition to restricting car use came out very strongly in the qualitative research, where respondents acted in a very hostile way when confronted with possible measures to reduce car use.

Most felt that they had *"paid their way"* and should be allowed to use their car as they pleased. In particular they opposed any direct restriction on the use of their car and would be prepared to pay for the privilege of continuing to use their car. Respondents said they would sacrifice many things to continue to enjoy the freedom they felt the car brings. In one extreme case a respondent would *"leave the country"* rather than be restricted in this way.

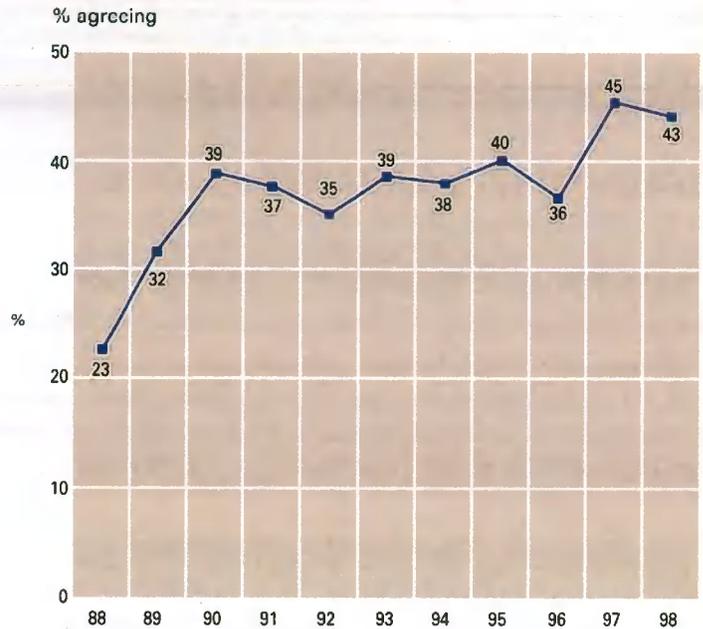
Many respondents were aware of different measures taken across the world to reduce car use and congestion - for example, number plate bans in Athens and car sharing lanes in the US. Many approved of these measures and compared such ideas unfavourably with the draconian approach they felt was typical of the UK. Respondents openly discussed ways of *"beating the system"*, were any direct restrictions ever put on their car use.

Greater use of public transport...

It was shown earlier in the report that people display superficial concern for the environment, but underlying this is a significant degree of apathy. The same picture can be seen with respect to the use of public transport.

When asked if they would use public transport more and their car less if public transport were improved, four in ten motorists say they would, particularly private motorists. There has been a slow but significant rise in the number of motorists expressing this sentiment since 1988.

Chart 3.4 Willingness to use public transport
"I would use my car less if public transport was better"



Base: All motorists
Source: The 1999 Lex Report on Motoring

When attitudes to public transport were probed in more detail, however, it became apparent that for many nothing short of a car ban would initiate a change towards greater use of public transport.

The major perceived problems were:

- Frequency of services
- Reliability and speed of service
- Directness of journeys
- The difficulties in making across town trips (as opposed to in and out of town centres)
- The safety, facilities and information provision at interchange points (bus stations, bus stops and train stations)
- Physical proximity to bus stops and rail stations
- Lack of knowledge and problems with accessing information about public transport

The last point - lack of knowledge of how the system works - is of growing importance because of whole generations that have never used public transport

"It would mean learning a whole new set of rules... I wouldn't know where to start..."

In last year's research, 69% of motorists said they never used a bus and 66% never used a train, both significantly higher than when the same questions were asked in 1988, when the figures were 65% and 58% respectively.

Cost was mentioned by some motorists as a rational factor preventing use of public transport, even though it was clear that most had no idea of the real cost of public transport in their area. This rational argument was undermined by the assertion of many motorists that they would not use public transport even if it was free.

Most motorists see the gap between the quality of the public transport service they would want and the current public transport system as one that it would be nearly impossible to bridge. More importantly there is a strong reluctance to be the first to make the move to public transport:

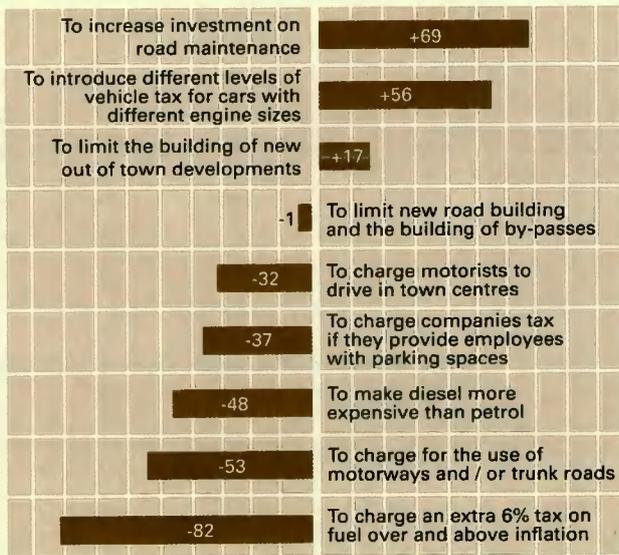
"I would have to see that I was missing out before I would change..."

Overall, switching even a proportion of journeys from car to public transport would necessitate a major campaign of information, allied to massive service improvement and significant disincentives in relation to car use (especially parking).

Support for specific policies....

In the quantitative research respondents were asked whether they would support or oppose a number of specific policies.

Chart 3.5 Net support for policies in the White Paper



Support has been expressed as net support i.e. those supporting minus those opposing.

Base: All motorists (1297)

Source: The 1999 Lex Report on Motoring

Whilst there was support for the principles of the White Paper, when respondents were faced with the reality of what these principles might mean in practical terms, there was an almost complete reversal of opinion.

The only policies with net support are:

- Increase in road maintenance - the only policy to positively impact on people's lives
- Increasing tax on larger cars - which people clearly see as equitable

Everything else is strongly opposed, particularly those policies that will involve people paying more money, such as road charging and increased petrol tax. There was less strong opposition to charging for driving in to town centres than for motorway tolls.

Motorway tolls....

Motorway tolls are seen as virtually inevitable - *"It's all a part of going in to Europe"* - and many thought that these would provide an excellent method for reducing commercial traffic on the "ordinary motorways". There was a feeling, however, that tolls would increase traffic on "A" roads and through smaller towns, which in turn would lead to more congestion in these areas.

Charging to enter town centres....

Charging to drive in town centres was seen as solely relevant for large urban centres. Some felt that it would not work at a practical level and could be extremely costly:

"Who's going to pay for it...the taxpayer, that's who..."

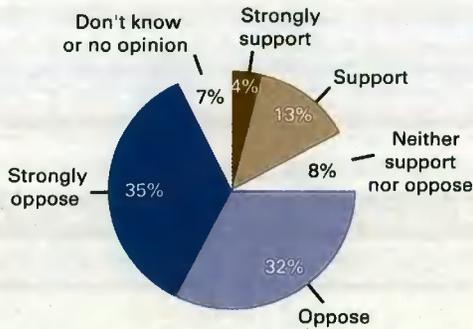
Many also felt that charging to drive into town centres would have little effect, since commercial interests would simply pay for their employees' costs and they would then pass these costs on to their consumers. There was also concern that this type of charging could damage local commerce and business interests and would also penalise poorer drivers, who might be forced off the road by these and other charges.

Parking charges and restrictions.....

Taxing work parking spaces was seen as a recipe for disaster, as employees would seek alternatives in nearby residential areas. *"On your own head be it"* was the general

attitude. Just 17% of motorists would support the introduction of a policy where employers are taxed if they provide parking spaces for employees, compared with 67% who oppose the introduction of such a policy.

Chart 3.6 Support for taxing employers who provide employees with parking spaces



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Equally, reducing car parking spaces in city centres was viewed as commercial suicide for city centre businesses, especially with the recent trend towards out of town shopping facilities. There was again concern that shoppers would simply look for alternative parking in residential areas.

Many motorists, however, felt that parking - or the lack of it - was a key measure in reducing car usage. Respondents admitted that parking difficulties were a major disincentive to using the car:

"Look at London - I would never dream of taking my car in there, you just cannot park."

Many drivers like the idea of park and ride schemes and had used them to good effect in particular parts of the country - Oxford being a prime example: *"That place is impossible to get around in a car...if you're going in to the middle of Oxford you can't do better than use the park and ride..."* The main perceived advantages are that it is "free", frequent and offers the benefits of both the car and public transport.

Improvements in public transport....

Further improvements in public transport were welcomed, although few really believed that they personally would ever willingly transfer to public transport. Many believe that investment in public transport has been insufficient for so long that achieving a workable useful system will take a long time and a lot of money:

"We're well behind the Europeans in terms of public transport...I can't see there being enough money to make a real difference in the near future..."

Other combinations.....

A number of combinations of policies were also tested on respondents to see whether bringing together carrots and sticks would be more acceptable to the general motoring public than policies in isolation.

As can be seen in chart 3.7, some of these combinations are significantly more acceptable, although many motorists are still unconvinced.

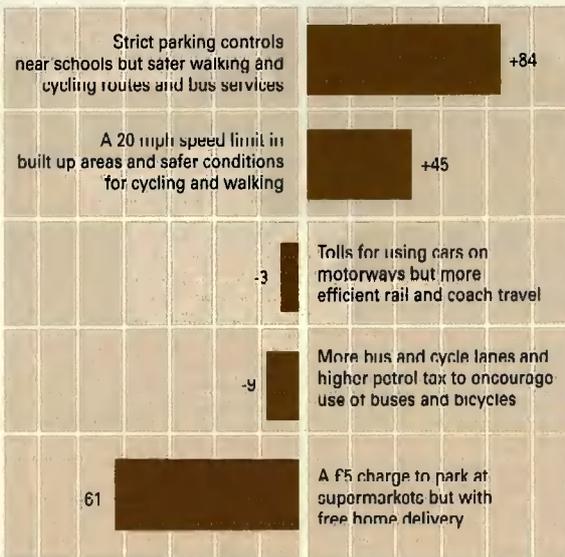
- There is strong net opposition to charging to park at supermarkets even if, as an alternative, shoppers are offered free home delivery
- Tolls on motorways - even if developed in conjunction with more efficient rail and coach travel - still face net opposition, but much less so than the idea of introducing motorway tolls in isolation



- Combining higher petrol tax with better bus and cycle lanes appears to make the idea much more acceptable
- 20 mph speed limits combined with safer pedestrian and cycling facilities are warmly welcomed

Chart 3.7 **Combining policy sticks and carrots**

Net support

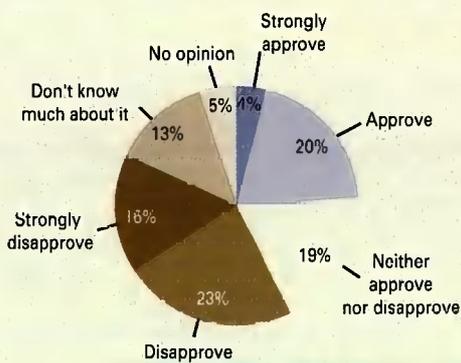


Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Overall level of support....

Overall 24% approved of the government's White Paper, whilst 38% opposed the review and 37% were unsure. Men and older people were more likely to support the proposed changes than women and younger people.

Chart 3.8 **Overall support for the White Paper**



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Lex comment:

Level of support for specific policies

The government has produced a series of potential transport policies designed to meet its widely approved objectives of having a more environmentally friendly, efficient and sustainable transport system. There is, however, very little support for the ideas they have come up with to achieve these objectives. People can not see the benefits to them, they will have to pay more to use their car, with no improvement in road infrastructure and no money invested in public transport to make it a more palatable alternative. Part of the problem is in the packaging of the ideas. When we asked them about combinations of carrot and stick policies, the motoring public become a little more enthusiastic. The current ideas are unpalatable and it is inevitable that, whatever the government's intentions, the public will start to see ideas like this as backdoor taxation, rather than a genuine attempt to provide a better transport system. Motorists want something equitable; they realise there could well be some pain but there must be something positive in it for them too.

We would urge the government to adopt a six pronged investment strategy:

- *Develop a strategic road building programme to alleviate predictable congestion black-spots and to improve the lives of many people in towns and cities*
- *Develop a long term road maintenance programme that is not subject to short term financial pressure*
- *Use the benefits of modern technology to manage roads better*
- *Invest in a school bus programme to provide congestion efficient and safe ways to get our children to school*
- *Raise MOT standards for all vehicles to keep the small number of high polluting vehicles off the road*
- *Use tax incentives in a clear and understandable way to encourage the use of environmentally efficient cars*

3.4 A policy for the UK or a policy designed for London?

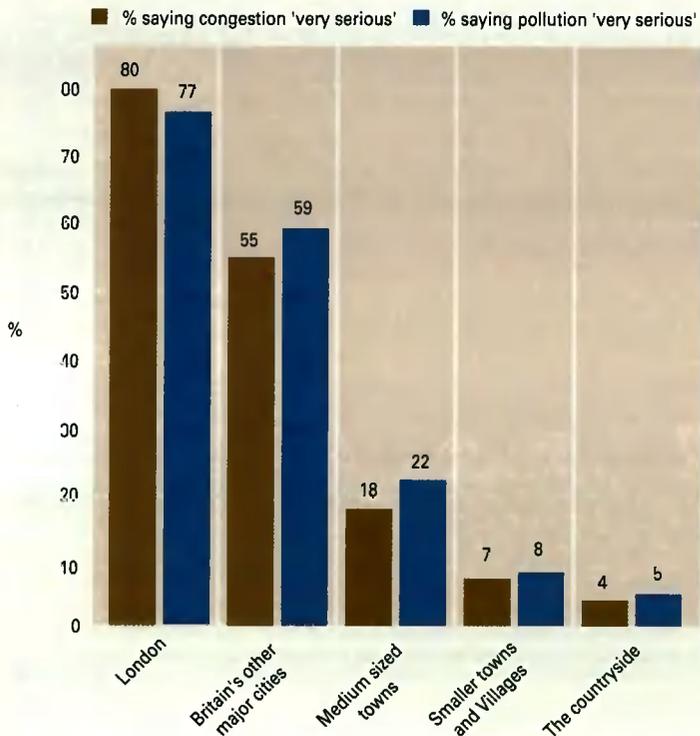
It was clear from the qualitative research that people perceive London as different from the rest of the country in terms of the transport problems it experiences and the quality of the public transport system available as an alternative to the car.

All respondents were asked how bad they thought congestion was in different parts of the country. The answers to this show that London (see chart 3.9) - and more arguably the other major cities in Britain - are where the perceived problems lie. These are not just "outsiders" views of life in the city. People who live in London and the South-East share the same views as the rest of the country.

Perceptions of air pollution are very similar to congestion. Motorists believe the problems lie within Britain's cities and in London in particular, with little or no serious problems in other areas of the country. Just 35% of the population live within London and the other major Metropolitan areas.

Chart 3.9 **London: a special case?**

"How serious do you think congestion/air pollution is in...?"



Base: All motorists commenting on all regions of the country (1297)
Source: The 1999 Lex Report on Motoring

Lex comment: A policy for the UK or a policy designed for London?

Most people do not live in areas affected by congestion or bad air pollution. Even in London, the area most people believe is the worst affected area of the country, most people have their own strategies to get around the daily congestion black spots. Policies need to reflect local conditions and we do not need blanket legislation. We welcome the new initiatives allowing local authorities the right to charge for entry in to city centres and for the right to spend that money on local problems. We would like this to go further and for there to be greater devolution of transport planning and organisational responsibility. Many people feel with the current White Paper that we are all being forced to have the same London sized hammer to crack small local nuts.



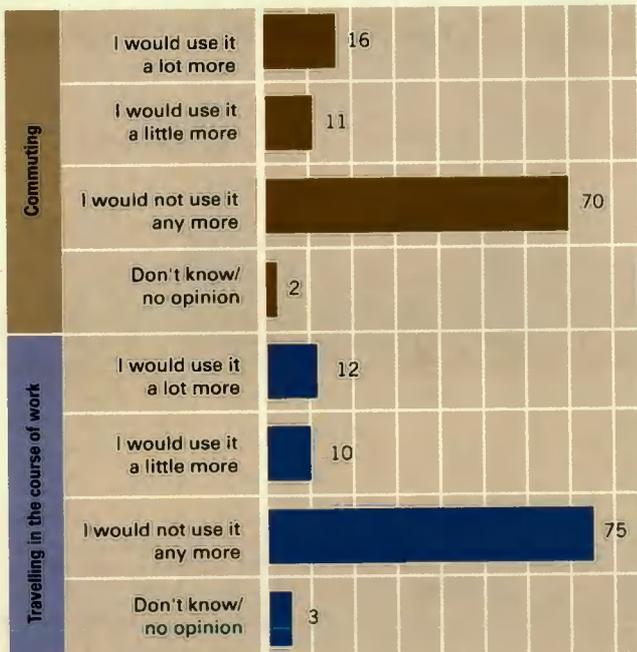
3.5 The expected impact of policies within the White Paper

In each of the areas of potential change suggested in the White Paper, respondents were asked how this would impact on their lives.

Public transport.....

Respondents were asked how they would respond if public transport were improved in two different ways; first if the cost of public transport were halved and second if the frequency of public transport were doubled. These questions were posed for specific journey types. The scenarios were made quite extreme to ascertain what would happen if there was a step change in public transport provision.

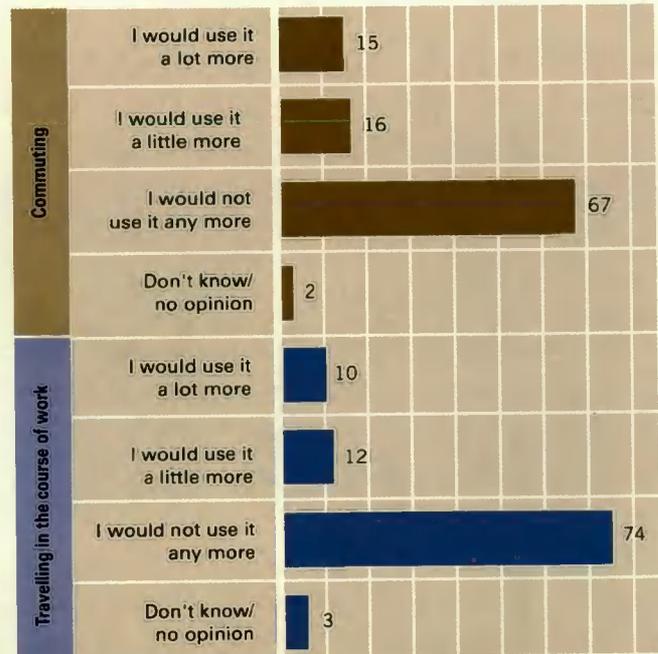
Chart 3.10 The impact of halving the cost of public transport



Base: All motorists who work part-time or full-time (865)
Source: The 1999 Lex Report on Motoring

The research indicates that the cost of public transport is not the major barrier to greater use. Very few people would use it significantly more, either for commuting or for travelling in the course of work, even if it was at half of its current level. Company car drivers would be even less likely than private car drivers to change their behaviour under this scenario

Chart 3.11 The impact of doubling the frequency of public transport



Base: All motorists who work part-time or full-time (865)
Source: The 1999 Lex Report on Motoring

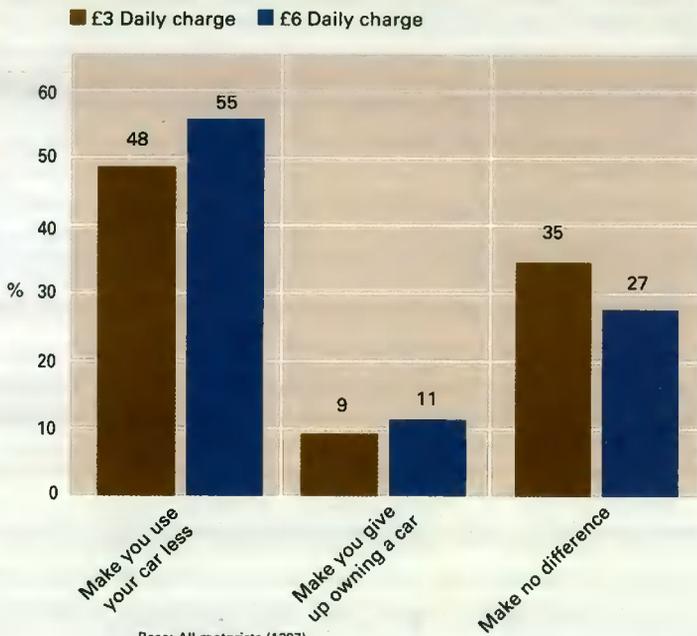
Increased frequency would not have a great impact on the use of public transport either. Three-quarters of working motorists say they would be completely unaffected by a doubling of frequency of public transport. Again there would be even less of an effect on company car drivers.

Charging for driving in to town centres...

Motorists in the quantitative survey were asked what they would do if they were charged to drive in to their local town or city, both in general and for two specific journey types; shopping trips and driving to and from work.

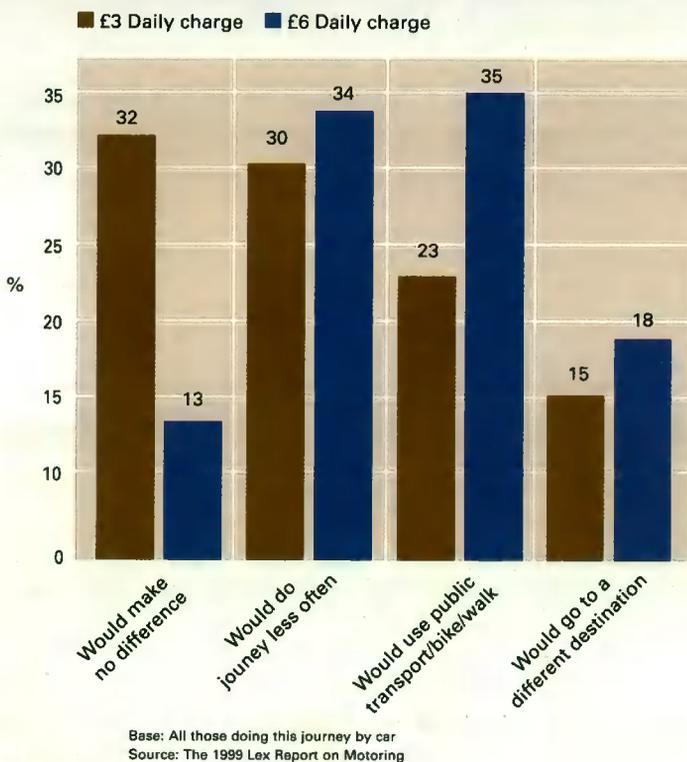
Half of the sample were asked about the impact of a £3 daily charge on their behaviour and half of the sample were asked about the impact of a £6 charge on their behaviour.

Chart 3.12 Impact of charging to go in to town centres on car ownership and car use



Half of motorists say they would use their car less under both the £3 daily charge scenario and the £6 daily charge scenario. Very few motorists say they would give up their car if charges were introduced for town centre driving.

Chart 3.13 Impact of charging on shopping trips into town

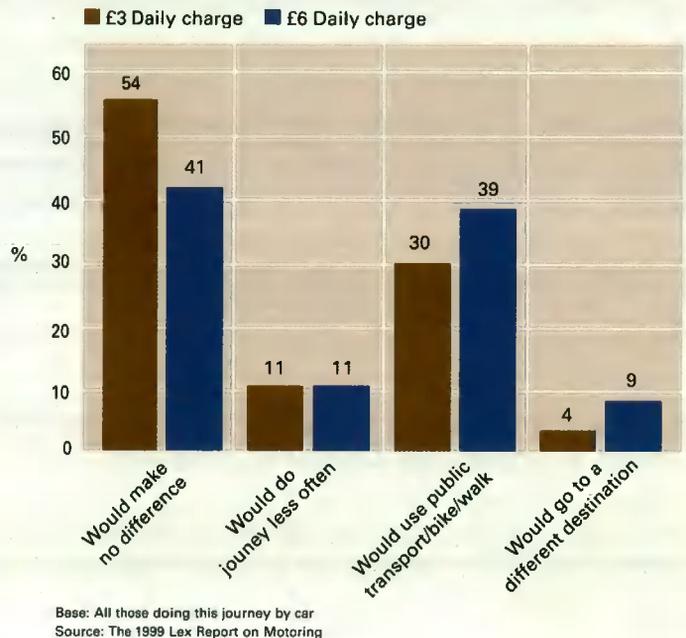


Many motorists believe that charging to go in to town centres will impact on their driving behaviour. Even at a £3 level only a third of people say it would make no difference to their driving behaviour, falling to just 13% of people at the £6 a day level.

Under both cost scenarios a third of people would choose to do the journey less often and around one in six would choose to go to a different destination - one, it must be assumed, which they would not have to pay to drive to.

The biggest difference between the £3 and the £6 charge is that at the higher level of charging more people say they would use public transport, walk or use their bike - 35% compared with 23%.

Chart 3.14 Impact of charging on trips into town to go to work



The impact of charging on commuting into town centres is significantly less than on the more discretionary shopping trip.

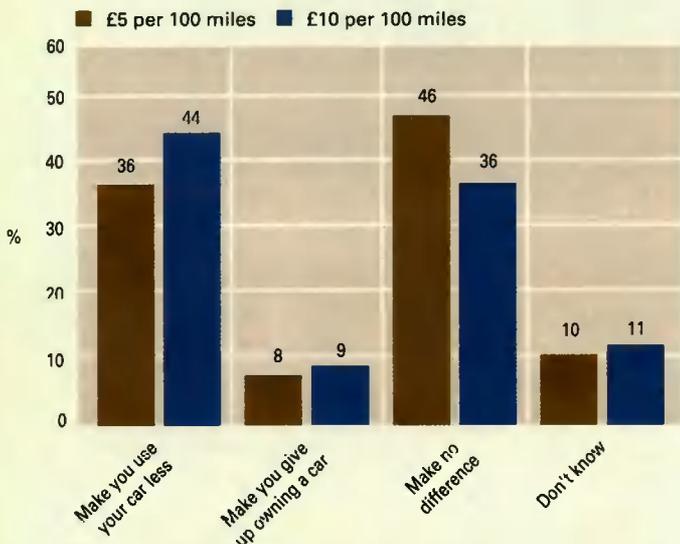
Under the scenario of a £3 charge, over half say it would make no difference to their journey patterns. Most of the rest would use an alternative method of transport - either public transport, walking or buses. A small number would choose to work at a different location.

Under the scenario of a £6 charge, a greater number would switch away from using their car to using other methods of transport.

Charging tolls on motorways and main roads...

Again respondents were asked how they would respond in general to motorway tolls and also how they would react on a number of different journey types. Half of the sample were asked about the impact of a charge of £5 for each 100 miles covered and half were tested on the impact of a £10 charge for each 100 miles covered.

Chart 3.15 Impact of motorway tolls on car ownership and car use



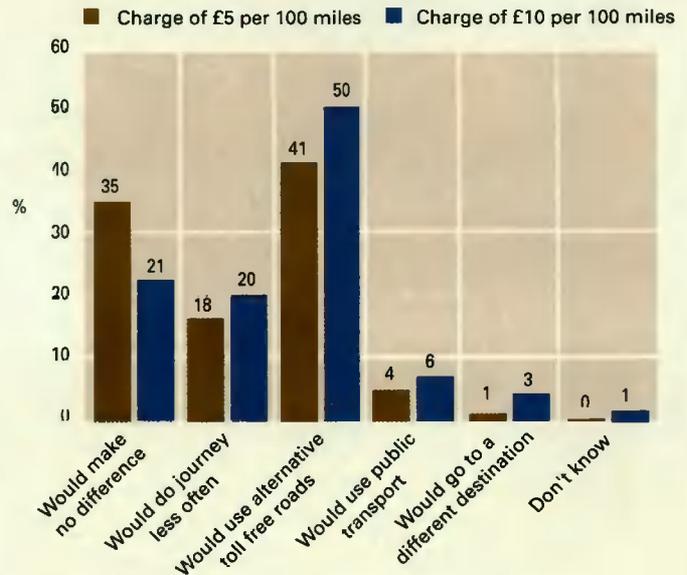
Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

A small number say that motorway tolls would make them give up their car altogether, but more significantly around four in ten say that they would use their car less than they do currently.

It is also noticeable that there appears to be relatively little sensitivity to the level at which the toll charges are set.

Almost as many people say they would switch away from motorway use at the £5 per 100 mile level as at the £10 per 100 mile level. The £5 per 100 mile level is approximately the same level British motorists may have experienced whilst on holiday in France.

Chart 3.16 Impact of motorway tolls on trips to friends and relatives



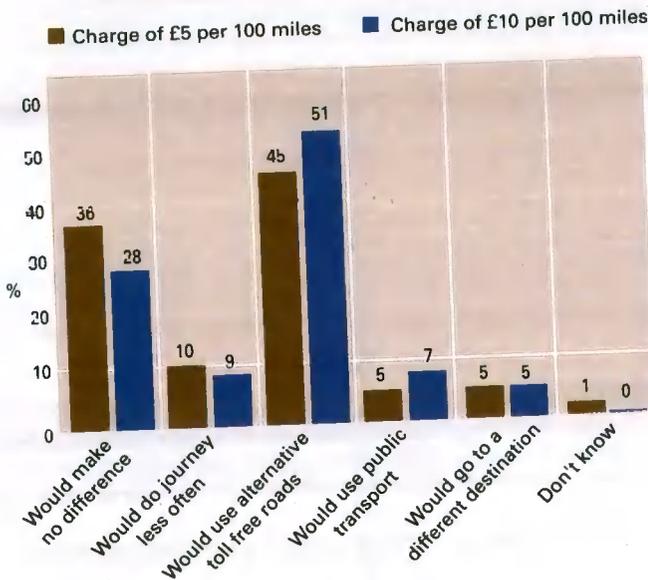
Base: All those doing this journey by car
Source: The 1999 Lex Report on Motoring

Under both tariff scenarios very few people would switch to public transport. The option most people would go for is to switch to toll free roads, switching congestion from one area to another. This appears to be the most significant impact of motorway tolls across all of the specific journeys investigated.

There appears to be less sensitivity to charging for motorway use than for charging to go in to town and city centres.



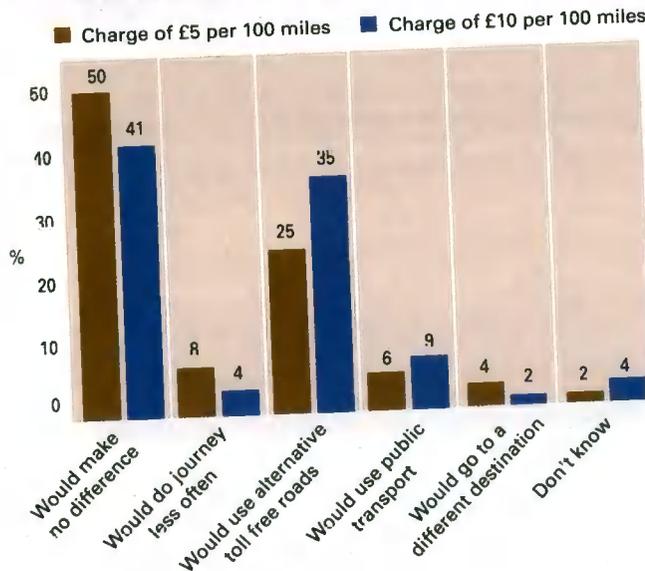
Chart 3.17 Impact of motorway tolls on trips to holiday destinations in other parts of the UK



Base: All those doing this journey by car
Source: The 1999 Lex Report on Motoring

With holiday journeys the expected switch away from toll roads to non-toll roads is even more marked. Half of motorists say they would switch to non-toll roads, with most of the rest saying they would just pay the tolls. There are very few who say they would switch to public transport.

Chart 3.18 Impact of motorway tolls on long distance trips for work purposes

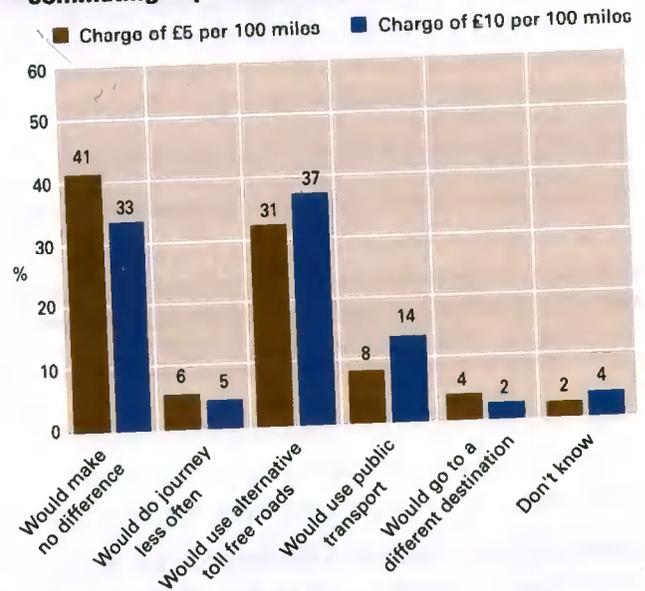


Base: All those doing this journey by car
Source: The 1999 Lex Report on Motoring

Motorists are much less sensitive to charging on journeys undertaken for work purposes. Half of people say they would use the toll roads at the £5/100 mile tariff (four in ten at the higher tariff). Again the vast majority of those

saying they would not use toll roads would switch to non-toll roads, rather than cut down the number of journeys they do or use alternative means of transport.

Chart 3.19 Impact of motorway tolls on commuting trips of over 20 miles



Base: All those doing this journey by car
Source: The 1999 Lex Report on Motoring

The impact of motorway charging on commuting would be felt by a relatively small number of people. Whilst there are relatively few who say they would choose not to do the journey or do it less often, more would use alternative means of transport than in any of the other scenarios. The majority of those who say they would switch away from the toll road would use an alternative toll free road - a result in common with all the other journey scenarios.

Higher vehicle tax....

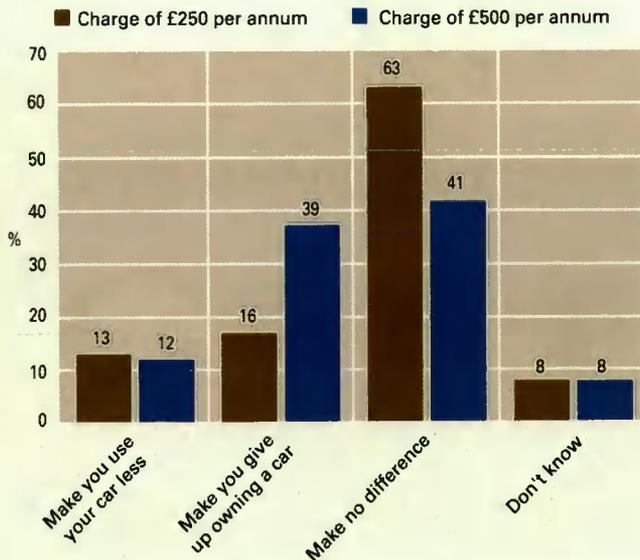
Although this was not one of the policies spelt out in the White Paper, raising vehicle tax ahead of inflation could be one of the mechanisms by which the government hits its environmental and traffic targets in the years ahead.

It can be seen in chart 3.20 that raising vehicle tax from its current level of £150 per year to either £250 or £500 would have a very dramatic impact. At the £250 level, one in seven drivers say they would give up owning a car altogether, with the impact being more significant for private car drivers (18%) than company car drivers (4%).

At the £500 level, four in ten motorists say they would give up owning their car altogether.

The impact would be greatest on poorer motorists. 24% of motorists who are DE social grade say an annual road tax of £250 would mean they would give up owning a car, compared with 8% of AB social grade motorists.

Chart 3.20 The impact of raising vehicle tax



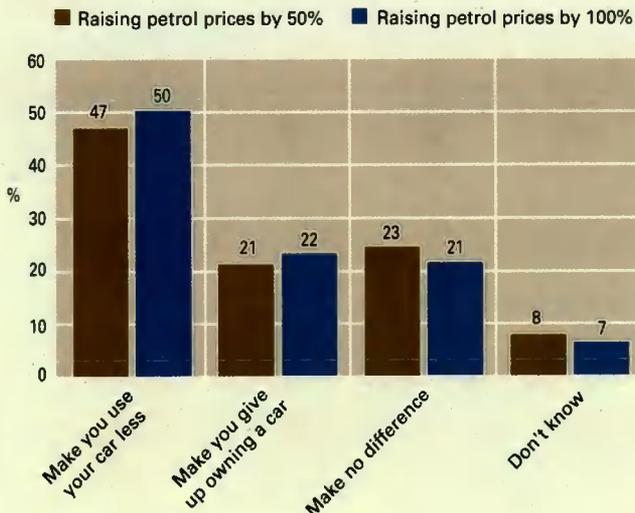
Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Higher petrol prices...

Reactions to relatively dramatic increases in petrol prices were sought. Half the sample were asked what they would do if petrol prices were 50% higher than they are now and the other half of the sample were asked what they would do if petrol prices were twice as high as they are now.

Although these scenarios seem quite extreme, under the government's current plans to raise duty by 6% a year in real terms, these levels would be achieved in around 10 and 15 years respectively (assuming oil prices stayed static in real terms). This is because duty and its associated VAT represent 80% of petrol prices at the pump.

Chart 3.21 The impact of raising petrol prices



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

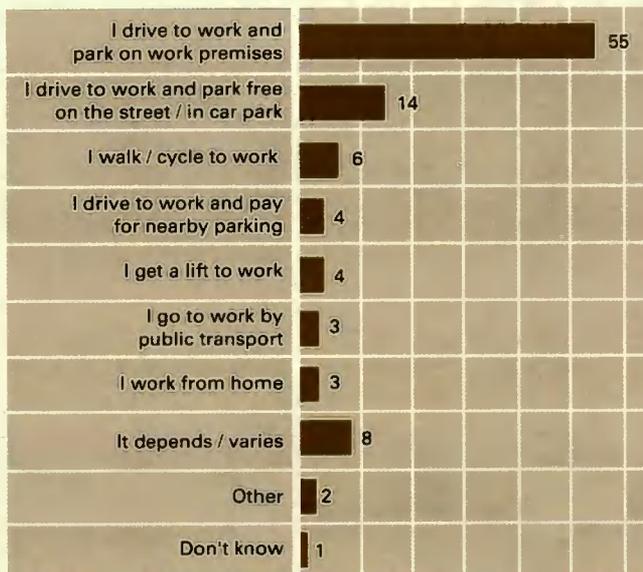
The expected impact of higher petrol prices is almost identical under the scenario of 50% higher prices as under the scenario of 100% higher prices. Two in ten say they would give up their car altogether, whilst half say they would cut down on the amount of travel they do.

The expected impact of higher petrol prices is very similar across all social grades.

This research highlights the difference in what people say they would do under extreme one off price changes and what they actually do when the same price change is slowly introduced over a number of years.

Parking charges...

Chart 3.22 Parking at work



Base: All motorists in full or part-time employment (865)
Source: The 1999 Lex Report on Motoring

Around half of working motorists currently park on their employer's premises, with a further two in five parking on the street or in nearby car parks. Just 3% go to work using public transport.

Respondents were asked how they thought their employer would react if they were taxed on the provision of parking space for employees, which was shown in section 3.2 to be very unpopular with motorists.

Chart 3.23 Expected response of employers if taxed on the provision of parking spaces

	%
Does not apply to my employer	35
Of those for whom it does apply...	
Would continue with current policy	29
Would charge employees for parking	22
Would restrict parking to senior employees only	19
Would no longer provide any parking spaces	16
Self - employed	6
Don't know	8

Base: All motorists in full or part-time employment (865)
Source: The 1999 Lex Report on Motoring

Around one in three motorists whose employer provides parking spaces, believe their employer would continue to provide parking spaces even if they were taxed for doing so. Around a quarter think their employer would pass the charges on to their employees. One in five would restrict parking to senior employees and one in seven think their employer would no longer provide parking for employees.

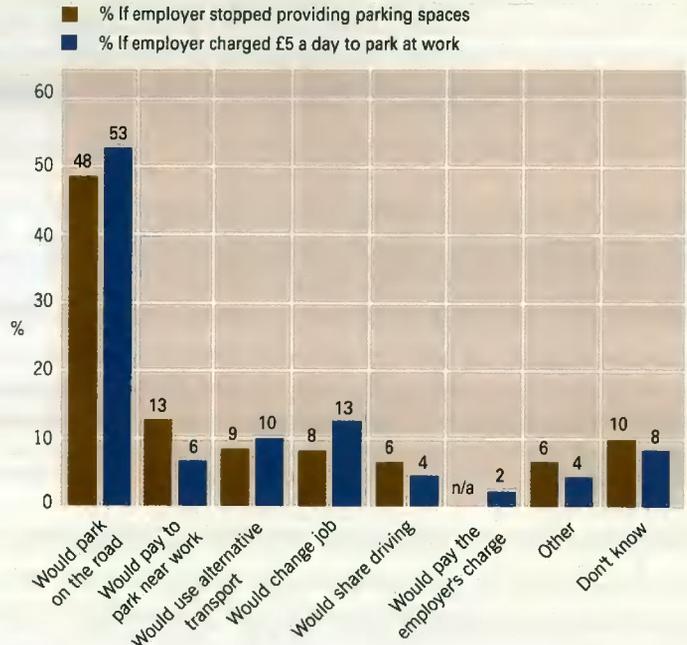
Those who park on their employer's premises were asked two questions: what would they do if their employer would not allow them to park at work and what would they do if their employer charged them £5 a day to park at work?

The main response to both questions is almost identical - half would just park on the road near to work, shifting any parking problems on to the local community.

Others would pay to park near to work (13%) or would use alternative means of transport (9%) if their employer stopped them parking at work. 8% say they would change job.

The other main responses to employers charging for parking would be to use alternative transport (10%) or change job (13%). Just 2% say they would pay the employer's charge.

Chart 3.24 Impact of changes to employer's provision of parking spaces

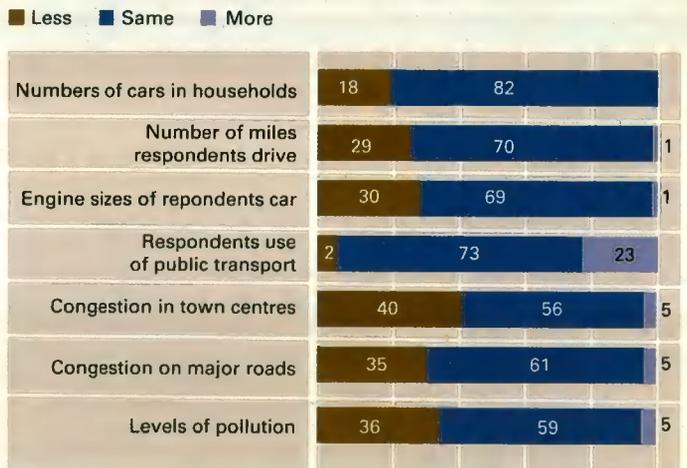


Base: All those who drive and park at work (460)
Source: The 1999 Lex Report on Motoring

Overall impact...

Having asked questions about the specific policy changes that may result from the White Paper, respondents were asked what they felt the overall impact of the changes would be in a number of different areas; car ownership, car usage, engine size, use of public transport, congestion and pollution.

Chart 3.25 The overall impact of the White Paper



Note: Those who answered "don't know" to these questions have been excluded from the analysis. "Don't knows" accounted for between 6% and 13% of responses.

Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Although a clear majority of people are sceptical about the impact of these policies, a significant number think the policies will impact both on their individual lives and on transport in general, despite the unpopularity of most of the measures.

The least significant impact is expected to be on car ownership, although one in five say they would expect to own less cars or no cars if these policies were implemented. However, three in ten expect to drive fewer miles as a result of these policies and the same number expect to be driving cars with smaller engines. This is consistent with research undertaken amongst fleet managers for the 1998 Lex Vehicle Leasing Report on Company Motoring - 34% of fleet managers expect to buy smaller engined cars for their fleets if the White Paper policies come to fruition.

More people are positive about the wider impact of the proposed policies. Over a third of motorists expect there to be less pollution and less congestion, both in towns and on motorways, as a result of these proposed policies.

Lex comment:

The expected impact of policies within the White Paper

The research has highlighted how reluctant people are to use public transport. Even radical improvements in service - twice the frequency and half the cost - appear to make public transport no more palatable to the majority of motorists. Charging for driving in town centres looks certain to have a short term impact on driver behaviour. People would not give up their cars, but it would make them think twice about using them on all journeys. The use of motorway tolls will have a less beneficial impact - it looks certain to switch very significant amounts of traffic on to other non-toll roads. Parking charges at work places will have a similar affect, with most people saying they would just park on nearby streets if they were charged to park at work. Overall, whilst the majority of motorists do not believe the proposed policies in combination will have much effect, small but significant numbers believe they will travel less, even if few believe they will get rid of their cars altogether.

3.6 The future of motoring

As a final adjunct to the questions on transport policies, respondents in the qualitative research were asked to project forward and think what sort of a motoring world they expected to develop in the next 5 to 10 years - not just in terms of policy but also in terms of the experiences they will face on the road.

The most frequently expressed views were:

1. That it would be much more expensive to own and drive a car

- Higher vehicle tax
- Higher fuel charges
- Higher tax on company cars
- Higher insurance costs

2. That there would be more cars on the road, more congestion and driving would probably be more difficult in terms of parking and access

3. That technology would ease some of the problems associated with driving

- More home working
- Satellite information and routing
- More traffic control and speed cameras
- More shopping by the internet
- More meetings by videophone

4. That there would be more "green" policies in place

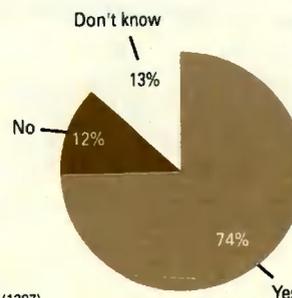
- Improved public transport
- More "green" fuel options or high quality electric cars
- A good school bus network
- Less parking in city centres

5. That both national and European government would incentivise people to curb their car use

The strong desire for an environmental star system...

One green policy suggested to respondents that was almost universally welcomed was to give cars a star rating according to how environmentally friendly they are - 74% of respondents wanted such a system to be introduced.

Chart 3.26 Should cars be given an environmental star rating?



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring



**A fair deal for today's teenagers,
tomorrow's motorists?**

S E C T I O N F O U R



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As an alternative way of looking at the future, 197 teenagers (aged 14-16) in motoring households were asked about how they feel about cars and car travel and what sort of transport future they would like to see.

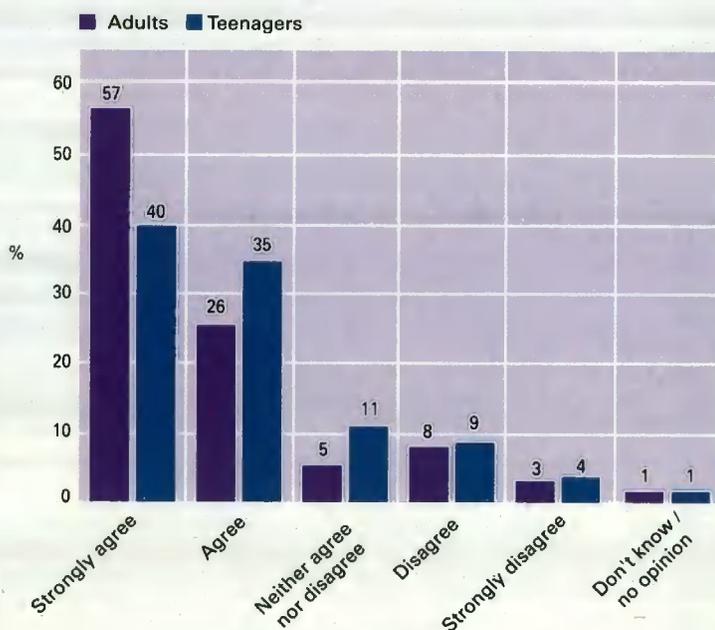
4.1 Teenagers' reliance on the car

In chapter 1 the reliance of motoring adults on their cars was established in some detail. Teenagers (aged 14-16) were asked a number of the same questions to understand how teenagers' reliance compares with their parents' generation.

Chart 4.1 Reliance on the car

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

% agreeing

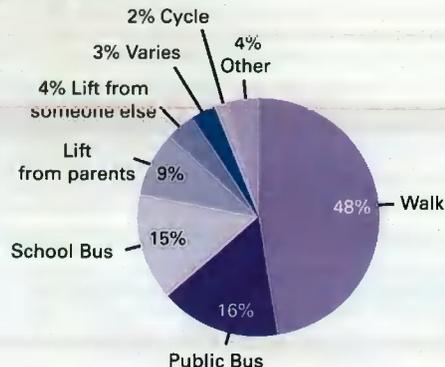


Base: All motorists (1297), All teenagers (197)
Source: The 1999 Lex Report on Motoring

Teenagers have a similar level of reliance on cars as when this question was last asked in 1994. Teenagers say they are slightly less reliant on the car than their parents, reflecting the increased likelihood that they walk, cycle or use public transport for some journeys. When they go to school, for example, half of teenagers walk and a third use either a public or a school bus. Only one in seven get a lift either from their parents or from someone else - this compares with a third of teenagers who went to school by car in 1993. These figures on travel to school are very heavily dependent on age - research by Mayer Hillman in 1990 showed how 54% of 11 year olds went to school unaccompanied, compared with just 11% of 8 year olds.

Teenagers' reliance on the car is based largely upon their parents driving them around - 76% of teenagers have a dad who drives and 60% have a mum who drives regularly.

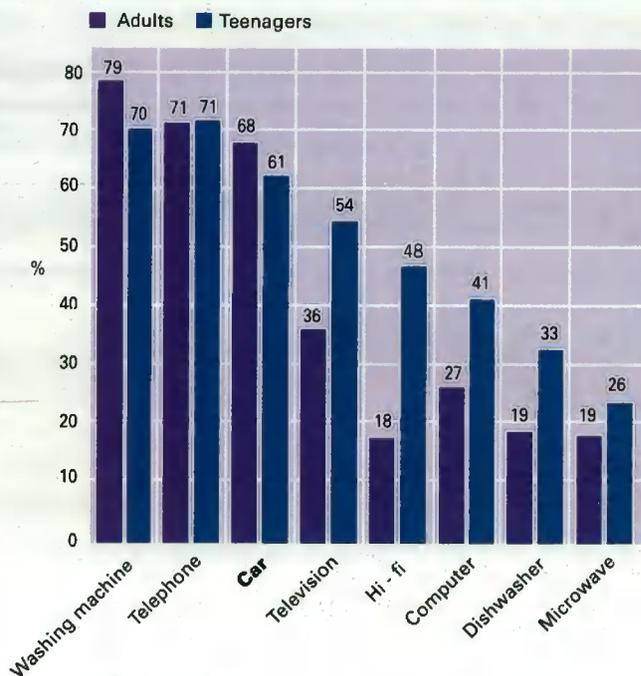
Chart 4.2 Teenagers' method of getting to school



Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

Chart 4.3 Reliance on household durables

% of those owning who say it is "absolutely essential to their life"



Base: All with durables
Source: The 1999 Lex Report on Motoring

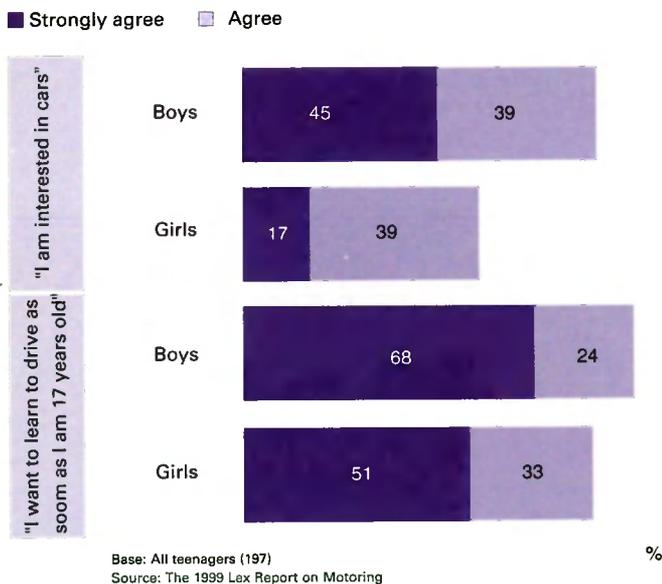
Teenagers also share their parents' perceptions of the importance of the car compared with other durables in the house, but the rest of the hierarchy was slightly different for teenagers. The car and the telephone are still core essentials, but the key leisure activities of television and music are much more critical for a higher percentage of teenagers. The "wired" generation still see these traditional media as more important than computers, even though 75% of teenagers in the survey had a computer in their house.

Although the teenagers in the survey were less physically reliant on the car than adults, 71% of teenagers said they were interested in cars, whereas only 60% of adults agreed with the statement "I don't care what I drive as long as it gets me from A to B".

There is a very marked difference between boys and girls, with the majority of boys (83%) saying they are interested in cars, compared with just over half of the girls in the survey. These figures are significantly higher than when the questions were last asked of teenagers in 1994 - at that time 75% of boys were interested in cars, compared with 33% of girls.

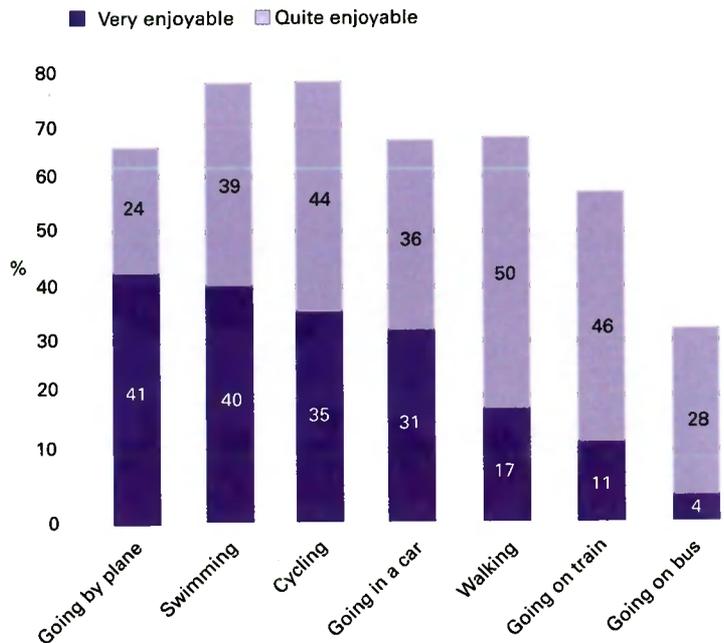
Despite this gender difference in the level of intrinsic interest in cars, the vast majority of both boys (92%) and girls (84%) say they want to learn to drive as soon as they are 17 years old. This compares with 46% of the total population aged 17-20 who have actually passed their driving test.

Chart 4.4 Attitudes to the car



Two thirds of teenagers enjoy travelling in a car, with only 6% saying they find car travel unenjoyable. Car travel is not as enjoyable as cycling, swimming or flying, but does however rate much higher than walking, train travel or, worst of all, bus travel.

Chart 4.5 How enjoyable is travel by car?



As with adult motorists, the teenagers in the survey also had their reliance on the car tested in a more humorous way, by asking them which of a series of free options they would most want; from car related items to a date with a film star or playing with their favourite football team.

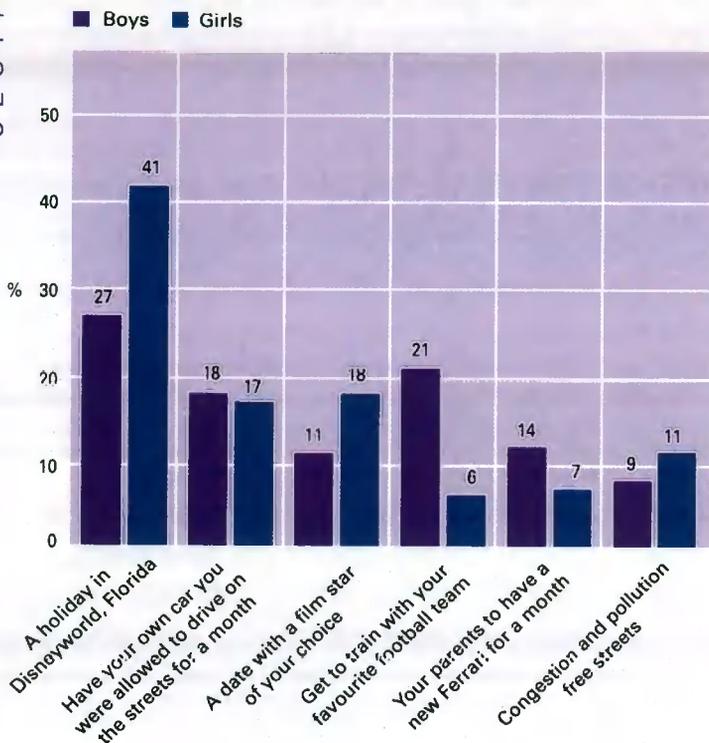
The research showed that children are much more romantic and imaginative than their parents and also that there are stark differences in the fantasies of boys and girls. The most popular option is a holiday in Disneyworld, Florida (33% chose this option), especially amongst girls (41%). Nearly one in five of both boys and girls would opt for their own car for a month (if it was legal) and 14% of boys would choose for their parents to have a new Ferrari for a month.

Nearly one in five teenage girls would opt for a date with a film star of their choice, whilst one in five of the boys would choose to train with their favourite football team.

The altruistic option of congestion and pollution free streets was only favoured by one in ten teenagers, with equal environmental apathy amongst both boys and girls.

Chart 4.6 What is your favourite fantasy?

"If you were given one of the following options which one would you choose?"



Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

Lex comment: Teenagers' reliance on the car

Teenagers are reliant on their cars because their parents are reliant on their cars. Cars have become part of the vital social infrastructure for children and without them much of the extra-curricular activities that are an essential part of a rounded education would be lost. As we commented earlier, however, there is a serious congestion problem caused by parents taking their children to school by car, particularly for children younger than those in our survey (just one in eight of the teenagers in our survey went to school by car). School buses are an accepted part of daily life for older teenagers and we believe the principle should be extended to all secondary school children and where possible to those in the older years of junior schools.

For the car industry it is encouraging that there is still such a high intrinsic interest in the car, but worrying that so many fewer girls than boys are interested

4.2 How should transport be changing in the UK?

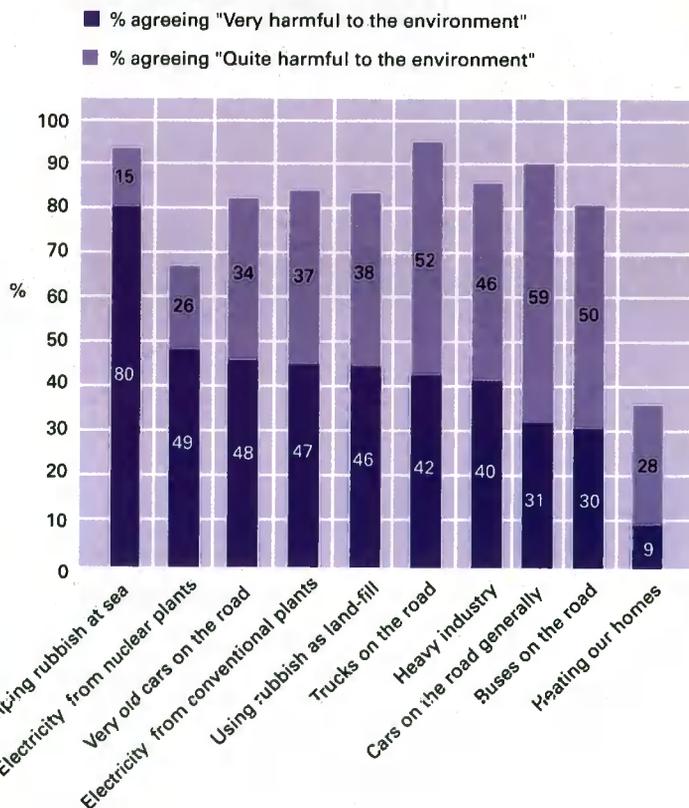
It was seen in chart 4.6 that the environment is not that motivating to many teenagers. Four in ten teenagers believe that the use of cars should be restricted because of the damage they cause to the environment (see chart 4.8.) - significantly less than when the question was asked of teenagers in 1993 (nearly six in ten agreed at that time). When probed on what they see as the main causes of environmental pollution, the main answers were:

- Dumping rubbish at sea and using rubbish as landfill
- Power stations (both conventional and nuclear)
- Very old cars on the road

Few teenagers see cars in general as being "very harmful" to the environment, although most believe that cars are "quite harmful" to the environment. Buses and trucks are seen as very harmful by a far greater numbers of teenagers.

As with adults, very few see heating in the home as any sort of environmental problem.

Chart 4.7 Contributions to pollution



Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

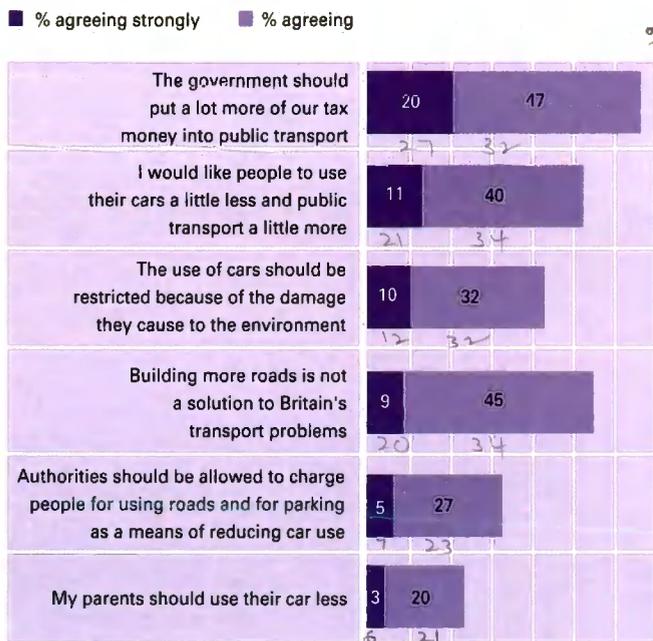
Most teenagers, as with their parents' generation, support the two main principles in the recent White Paper:

- Encourage people to use their cars a little less and public transport a little more
- Building more roads does not solve transport problems

When asked about some of the possible means of achieving these strategic transport goals, like their parents' generation, there was much less widespread support for what is currently being planned. For example:

- Two thirds of teenagers think that the government should be putting a lot more tax money in to public transport
- Only a third of teenagers would support road charging and parking taxes as a means of reducing car use
- Less than a quarter believe their parents should use their car less

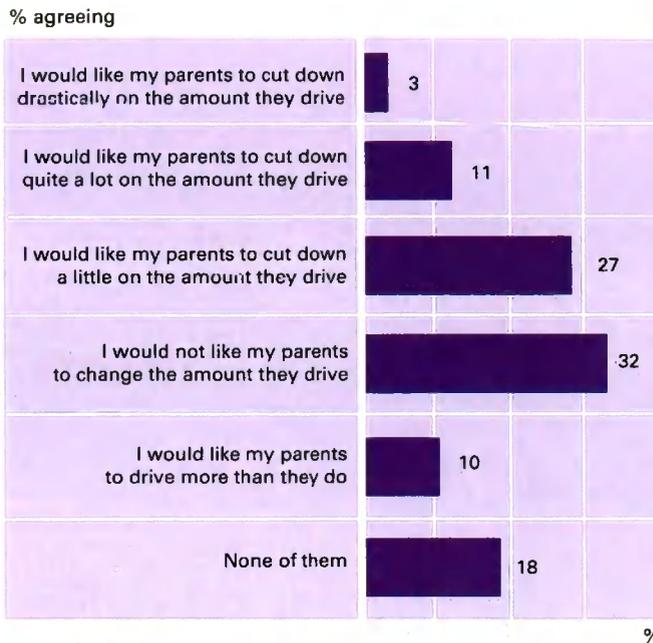
Chart 4.8 Support for changing the way we travel



Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

When probed in more detail about how much their parents drive, four in ten would like to see some reduction in the amount their parents drive, but the majority of these just wanted their parents to cut down a little. A third did not want their parents to change the amount they drive at all, with one in ten actually wishing their parents would drive more than they do currently.

Chart 4.9 Desire for parents to change their driving behaviour



Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

Teenagers' views on transport policy...

The respondents in the teenage survey were asked what they would do to cut down the amount of pollution and congestion on Britain's roads, if they were in charge of transport in Britain. There was a very wide ranging response to this question, encompassing most of the ideas discussed by transport planners and academics on a regular basis. The most common response was to improve the public transport system by increasing frequency of services, reducing prices, building more railways and increasing the number of park and ride schemes. The next most common set of responses was to limit the damage caused by cars by using alternative fuels, taking old cars off the road, increasing the use of catalytic converters and having regular checks on emissions. There was relatively limited support for draconian schemes whereby cars were banned or their ownership restricted.

Chart 4.10 What would you do if you were in charge of transport in Britain?

Action	Description	%
Improve public transport	Improve / more public transport	25
	Cheaper public transport	11
	Use trains / monorails	3
	Put more freight on trains	2
	Have more park and ride schemes	2
Reduce environmental impact of car	Make electric/solar/ alternative fuel cars	10
	Take old vehicles off the road	5
	Catalysts on all cars	3
	Use only unleaded petrol	3
	Have regular checks on emissions	2
	Restrict car ownership/use	Not have so many cars
Limit the amount of cars people can have		5
Stop making so many cars		4
Car sharing		3
Other main issue		Encourage walking/cycling

Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

One area where many teenagers would definitely like to see change is in their parents' driving behaviour. When asked what was the most annoying thing that their mum or dad did whilst driving, one in three said "nothing", but the rest has a litany of complaints ranging from not concentrating on the road, to shouting, singing and sitting with their nose too close to the windscreen. Other parents drove with one or no hands on the wheel, "forgot" to indicate or would not overtake other cars in any circumstances.

When asked to judge who was the best driver out of their mum and dad, over half said their dad was the best driver, with one in four saying they were equally good and one in four saying that their mum was the best driver. Girls were much more likely to be egalitarian in their opinions, with four in ten saying they were equally good, whilst the boys were more likely to get off the fence and plump for either their mum or their dad.

When adults were asked who they thought were the best drivers; the majority of men thought there was no difference (58%) whilst the majority of women thought they were the best (54%).

Chart 4.11 The most annoying things your mum or dad do whilst driving

Complains about other drivers	9
Drives too slowly	8
Sings	7
Beeps / shouts at other drivers	6
Smokes	6
Speeding	5
Drives erratically / doesn't concentrate	5

Base: All teenagers with a mum or dad who drive (184)
Source: The 1999 Lex Report on Motoring.

Chart 4.12 Who's the best driver, mum or dad?

Boys' responses	%
Mum	27
Dad	58
The same	16
Girls' responses	%
Mum	21
Dad	42
The same	37

Base: All teenagers with both a mum and dad who drive (83)
Source: The 1999 Lex Report on Motoring

Lex comment:

How should transport be changing in the UK?

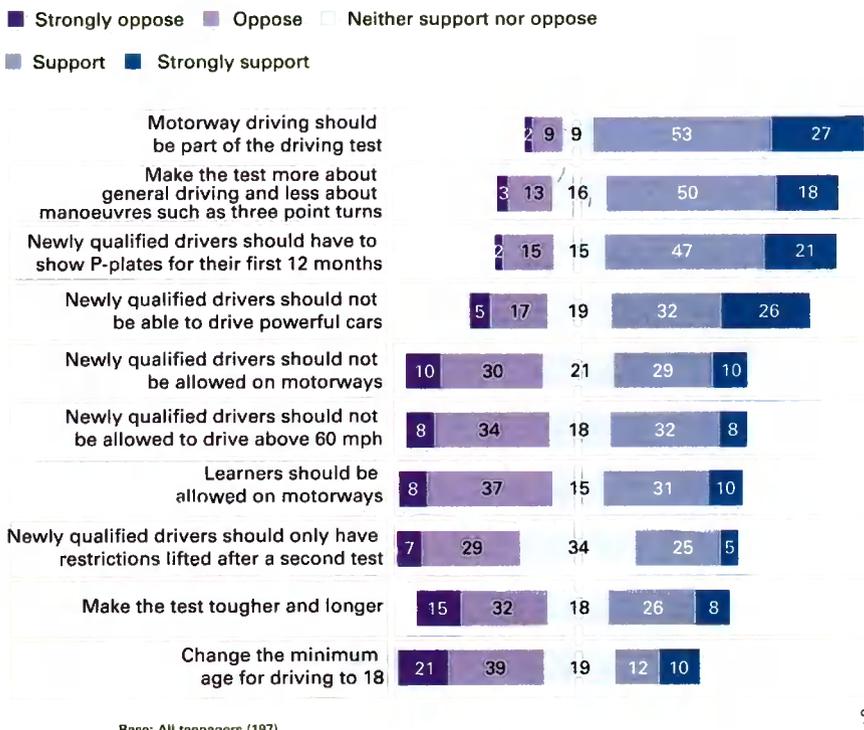
The simplest, clearest and most common sense views in this report came from 14, 15 and 16 year olds:

- *The car does create environmental problems, but keep it in perspective*
- *We all want less journeys to be done by car, but this can only be done through investing in a far better public transport system*
- *Do not curb car use or price motorists off the road, because it is such an important part of our lives and people will deeply resent it*
- *Do all you can to make the emissions from cars as low as possible*

4.3 Attitudes to the driving test

With 88% of teenagers in motoring households wanting to learn to drive as soon as they are 17 years old, they were asked what changes, if any, they would like to see in the current driving test.

Chart 4.13 Support for changes to the driving test



Base: All teenagers (197)
Source: The 1999 Lex Report on Motoring

qualified drivers can do and those who want to maintain the status quo. The main areas of contention are:

- Should newly qualified drivers be allowed on motorways?
- Should learners be allowed on motorways?
- Should newly qualified drivers be allowed to drive above 60 mph?
- Should newly qualified drivers only have restrictions lifted after a second test?

There is strong net support for two changes to legislation which would increase restrictions on new drivers. These views demonstrate the fears and worries of many new potential drivers:

- Over two thirds believe newly qualified drivers should have to show P-plates for their first 12 months
- Nearly six in ten agree that newly qualified drivers should not be able to drive powerful cars

Finally there is overwhelming support for making the driving test more relevant to the real driving experience they will face once they pass their test:

- Make motorway driving part of the driving test
- Make the test more about general driving and less about manoeuvres such as three point turns

It may have been expected that teenagers would vote in their own self-interest with respect to any potential changes in the driving test. This is true to a certain extent, for example:

- There is net opposition to making the test tougher and longer (although 34% are still in favour of making things more difficult for themselves)
- There is strong opposition to changing the age at which you can drive to 18 (but there are still 32% in favour of this idea)

There is, however, a clear split between those who believe there should be restrictions on what learners and newly

Lex comment: Attitudes to the driving test

We share exactly the same views as those expressed by the teenagers in our survey:

- *Make the driving test more relevant and include motorway driving as part of it*
- *Make newly qualified drivers display P - plates for a year after they have taken their driving test and during that time:*
 - *restrict the engine size of the cars they can drive to 1600cc*
 - *restrict their maximum speed to 60 mph*





S E C T I O N F I V E

Women represent an increasingly important part of the car market. In this section we look at how they are treated by the car industry and how they would like things to change.

5. Women in the UK car market

Women are a crucial part of the car market, a fact which has been recognised by the car industry for many years. In this year's survey:

- 40% of all drivers are women
- 20% of company cars are for female employees
- 40% of women drivers have been personally responsible for buying a car in the last 2 years
- Women were personally responsible for buying 40% of all the new cars bought in the last 2 years
- Women were personally responsible for buying 32% of all the used cars bought in the last 2 years

Against this backdrop, the research for this year's report aimed to find out if the historically poor service that women received from the car industry is still the case, or whether this is a myth that is no longer true.

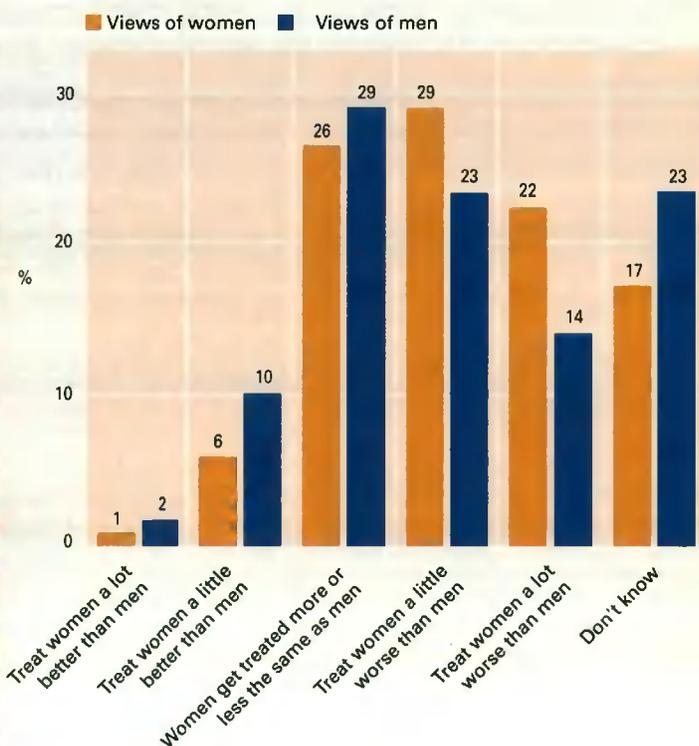


The attitudes of dealers and garages towards women when they are buying a car...

Both men and women in the survey were asked whether they thought men or women got better treatment when they went into a garage to buy a car. Many people were unsure about this issue (20%), but amongst the rest four times as many felt women got worse treatment than men. Most thought women were only treated "a little worse" than men.

Whilst men and women broadly agreed about the current treatment of the two sexes by the motor trade, more women felt that men got a better deal from dealers and garages.

Chart 5.1 Attitudes of dealers to women buying cars



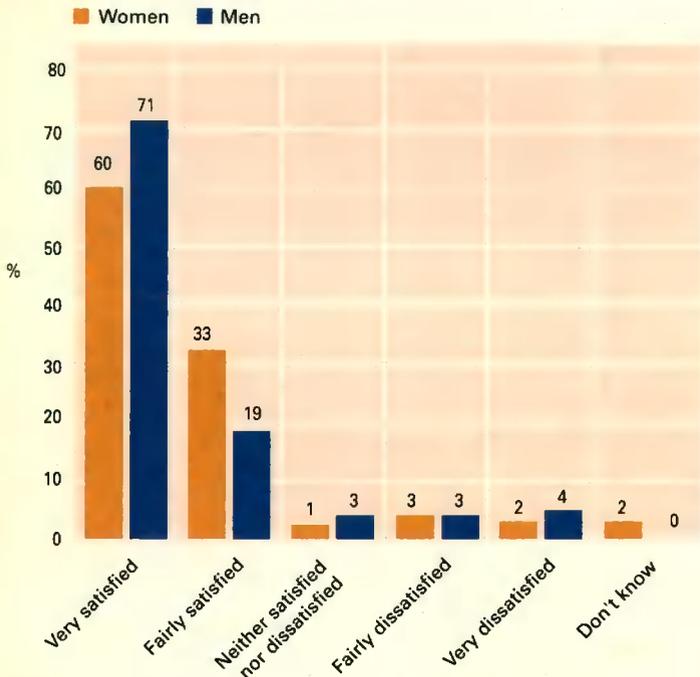
Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

To a degree, however, it appears that the answers shown in chart 5.1 reproduce the myth of women getting much worse service than men. When women who actually bought cars in the last two years were asked how satisfied they were with the garage or dealer, levels of satisfaction were very high and also very similar to the satisfaction levels reported by men.

Amongst new car buyers, 93% of women were satisfied compared with 90% of men. Just 60% of women, however, were "very satisfied" compared with 71% of men.

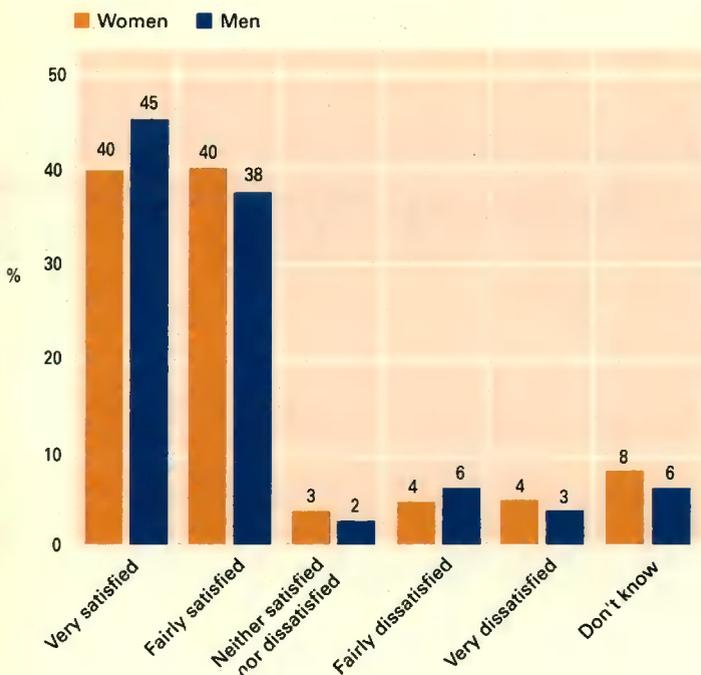
Amongst used car buyers, levels of satisfaction were generally lower than for new car buyers. 80% of women were "satisfied" (40% "very satisfied") and 83% of men (45% "very satisfied").

Chart 5.2 Satisfaction with dealers when buying a new car



Base: All motorists who bought a new car within the last 2 years (196)
Source: The 1999 Lex Report on Motoring

Chart 5.3 Satisfaction with dealers/garage when buying a used car



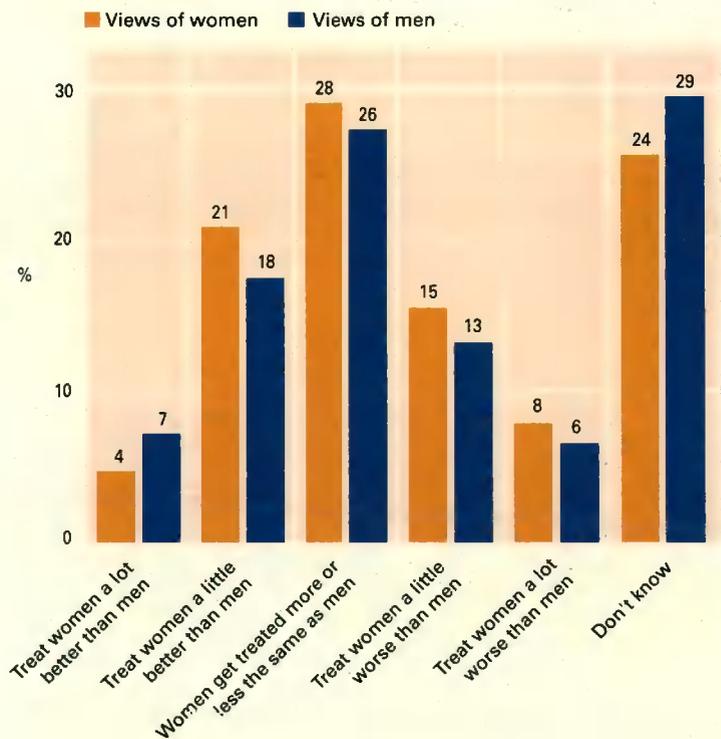
Base: All motorists who bought a used car from a garage/dealer within the last 2 years (170)
Source: The 1999 Lex Report on Motoring

The attitudes of dealers and garages towards women when they are getting their car serviced...

A different picture emerges with respect to getting the car serviced. There are actually more people who think that women get treated better than men when they take their car in to be serviced, than think men get treated better than women. This is a view shared by both men and women. Just under three in ten think that men and women get treated equally well when they take their car in to be serviced.

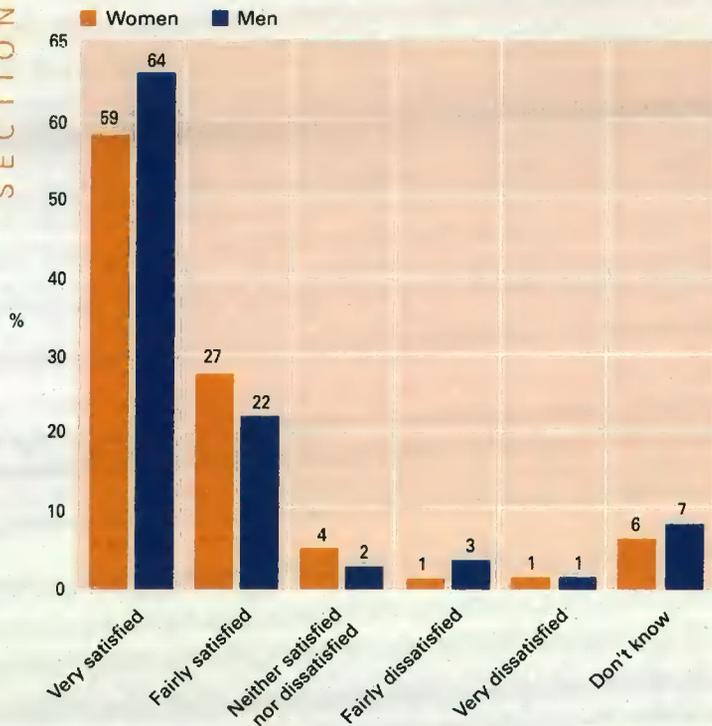
This healthier picture with respect to car servicing is borne out by the customer satisfaction research amongst those who take their car to a garage, dealer or service unit for servicing. Satisfaction is high - 86% of women are "satisfied", with over half "very satisfied". The satisfaction figures amongst men who take their cars in to be serviced are almost identical.

Chart 5.4 Attitudes of the motor trade to women having their car serviced



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Chart 5.5 Satisfaction with servicing of car



Base: All motorists who get car serviced by a dealer/garage/service centre/unit (928)
Source: The 1999 Lex Report on Motoring

How confident do you feel about owning a car...?

All respondents were asked how confident they felt about different aspects of the car owning, buying and driving experience.

Confidence levels are very high with respect to driving amongst both men and women, with 57% of people saying they are "very confident" and nine in ten saying they are confident to some degree. The less confident drivers are much more likely to be women than men, although it may be that women feel more able to admit to feeling unconfident than men do.

Confidence with respect to other aspects of car ownership; buying a car, getting the car serviced and arranging finance are much lower generally. Only a third of people feel "very confident" about getting their car repaired and just one in four feel "very confident" about buying a car or arranging finance. Again, levels of confidence are much lower amongst women than amongst men:

- 32% of men are "very confident" about buying a car compared with 13% of women

- 43% of men are "very confident" about getting their car serviced or repaired compared with 25% of women
- 27% of men are "very confident" about arranging finance for their car compared with 15% of women

Chart 5.6 Level of confidence when driving and buying a car

	Driving a car	Buying a car	Getting your car serviced or repaired	Arranging finance
	%	%	%	%
Men				
Very confident	63	32	43	27
Confident	29	35	33	27
Other responses	8	33	24	46
Women				
Very confident	47	13	25	15
Confident	31	19	30	26
Other responses	22	68	45	59

Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

How should things change for the better...?

When asked how dealers and garages should change with respect to how they treat women, the answers were fairly simple - treat women as equals, treat them with respect, talk to them in simple but unpatronising language and listen to what they want.

Typical comments included:

"Treat us as equals, not like idiots who are only interested in the colour"

"I just want them to be honest and treat us as if we know what we are talking about....don't try to con us"

Many people did not feel anything needed changing, however, and there were many comments from women such as this:

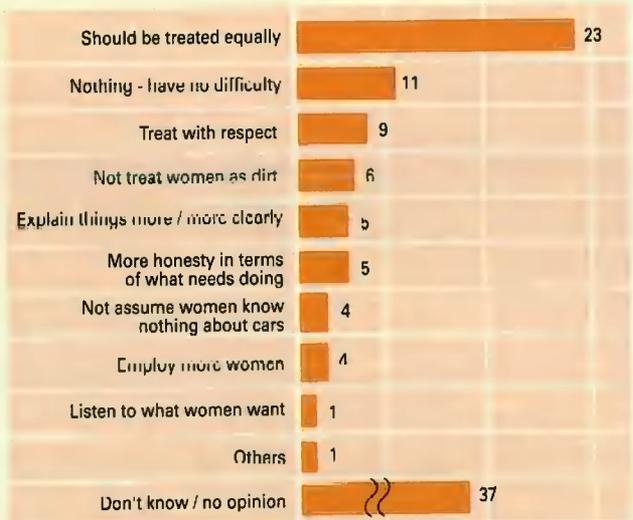
"I have been told that women get a worse deal, but I have never experienced this"

One of the commonly expressed comments regarding how things might change for the better, is if garages and dealers employed more women; from mechanics, to salesmen, to managers:

"They should perhaps employ women to discuss problems with customers and encourage more women to become mechanics"



Chart 5.7 How should the industry change?



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

%

Lex comment:

Women in the UK car market

The motor industry has undoubtedly come a long way in its treatment of women over the past twenty years. The industry probably does not deserve the myth that still surrounds its treatment of women, but that is a legacy it will have to live with. It clearly still has a long way to go, however, and there should be no complacency. Service standards need to improve across the board - not just for women - and this is probably the industry's biggest challenge for the next 10 years. The suggestion that there should be more women in the car industry is one we heartily endorse, not just because it will help improve the service female customers feel they are getting or because it is morally and legally the correct thing to do, but because by not employing women the industry is not getting the highest possible calibre of staff.



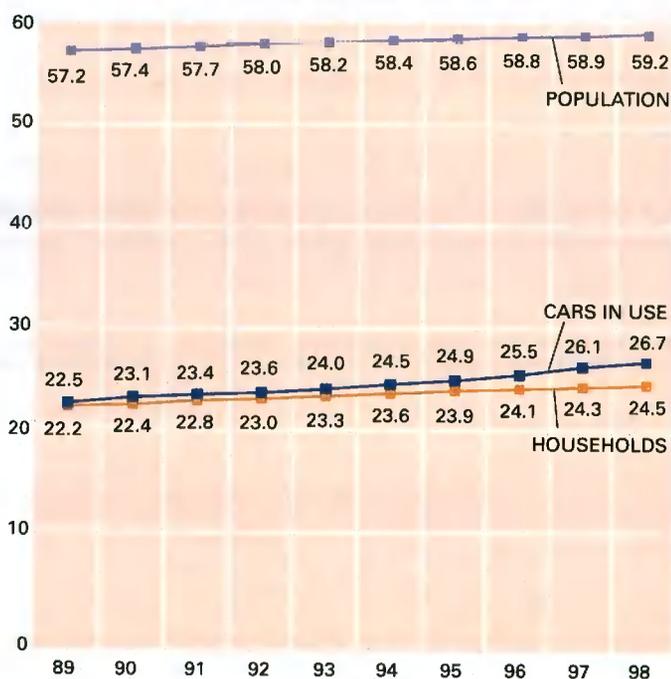
The following charts summarise some of the key statistics on car ownership and car sales in 1998.

6.1 Car ownership in the UK

The number of cars in the UK has grown by around 0.5 million over the past 12 months to a new high of 26.8 million. Since 1989, the number of cars has risen by 19%, whilst the number of households has risen by 10% and the population by just 3%.

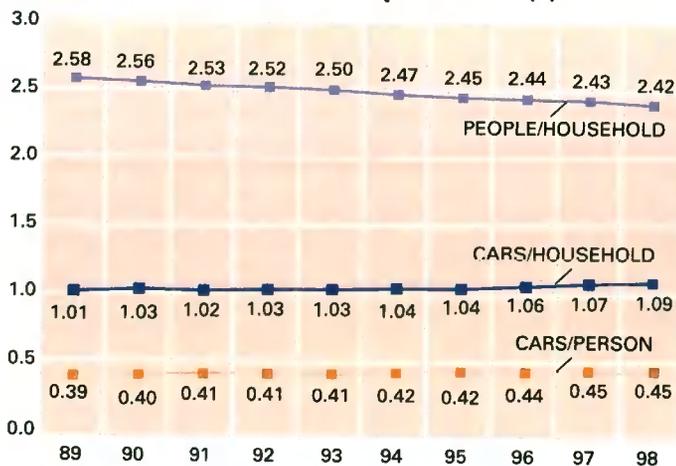
Whilst the average size of household continues to fall (from 2.58 in 1989 to 2.42 in 1998), the number of cars per household continues to rise. In 1989 the number of cars per household was 1.01, rising to 1.09 by 1998. Most of the growth has been in multi-car households.

Chart 6.1 Car ownership in the UK (1)



Sources: SMMT, DETR, Government Actuary

Chart 6.2 Car ownership in the UK (2)



Sources: SMMT, DETR, Government Actuary

6.2 New car sales

New car sales performed strongly in the first quarter of 1998, but flattened off in the middle of the year. The final figure for the year was 2.25 million, a 4% rise on last year.

What growth there has been over the course of the year has been in the corporate sector, which saw growth of 7%, compared with a decline of 1% in the private car market.

Chart 6.3 New car sales



Source: SMMT

The threat of recession continues to hang over the UK economy and even if there is small growth in the economy in 1999, most industry experts are expecting a fall in new car sales.

Motorists were asked how they thought the potential recession could affect their motoring behaviour. This question was asked in a similar way in the middle of the last recession, when motorists were asked how the recession had actually affected their behaviour.

The worrying news from the motor industry's perspective is that four in ten motorists expect to respond to any recession by delaying the purchase of their next car - this is more than double the number that actually delayed a car purchase during the last recession.

Many of the expected reactions to a potential recession were very similar to actual behaviour during the last recession:

- Around one in ten expect to cut down on their mileage
- Around one in seven expect to trade down on the car they buy
- Around one in twenty expect to get their car serviced more often so that they can keep it longer

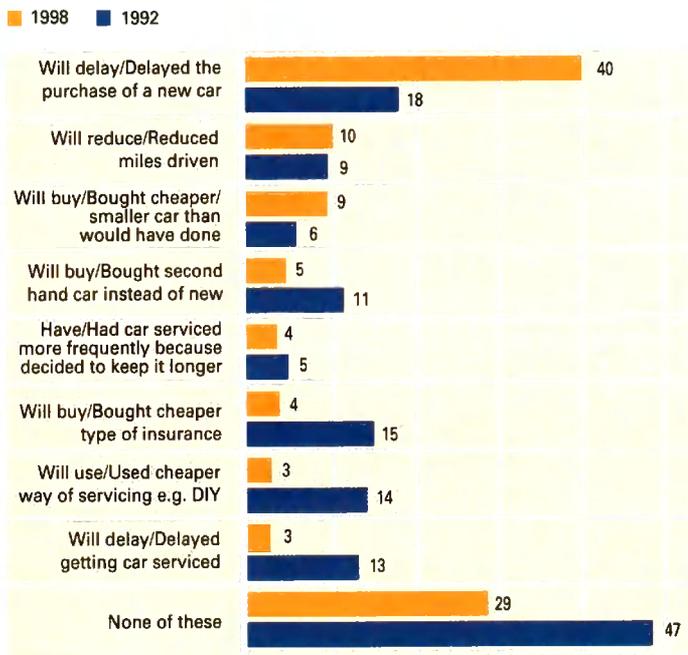
In a number of areas, people seem less sensitive to the current looming recession than they actually were during the last recession:

- Getting their car serviced more cheaply
- Getting cheaper insurance
- Getting their car serviced less frequently

Chart 6.4 Reaction of motorists to the economy slowing down

1998: Which of these would you do if the economy slowed down over the next 12 months?

1992: Which of these have you done over the past year, as a result of the worsening economic climate and high interest rates?



Base: All motorists
Source: The 1999 Lex Report on Motoring

6.3 Future levels of car ownership

Every year in the Lex Report on Motoring survey, respondents are asked both how many cars their household has and how many they expect to own in two year's time. Historically it has been found that people are over-optimistic about their future circumstances, but that during recessionary times people become more realistic.

Figures for 1997 have been adjusted in charts 6.7 and 6.8 to more closely reflect expected levels.

Chart 6.6 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
Actual	1997		51	49
Actual	1998		59	41
Expected in 1997 for 1999	1999	1	47	52
Expected in 1998 for 2000	2000	1	54	45

Base: All drivers
Source: The 1999 Lex Report on Motoring

Chart 6.7 Grossed up estimates of numbers of cars in Britain at time of surveys and expectations in two years time

	Households in GB (DETR)	Households with cars (OPCS)	Ave. cars per household (Lex)	Grossed up no. of cars	Expectations in two years time		
					Year of expectation	Cars per household	Grossed up no. of cars
	m	%		m			m
1988	21.5	66.0	1.47	21.0	1990	1.59	23.3
1989	21.7	66.0	1.53	22.6	1991	1.67	25.1
1990	21.9	67.0	1.55	23.2	1992	1.63	24.9
1991	22.1	68.0	1.51	23.0	1993	1.59	24.8
1992	22.5	67.8	1.52	23.0	1994	1.55	24.5
1993	22.7	68.6	1.50	24.0	1995	1.60	25.8
1994	22.9	69.0	1.50	24.0	1996	1.57	26.4
1995	23.1	69.7	1.50	24.3	1997	1.59	27.0
1996	24.1	69.7*	1.51	25.4	1998	1.60	27.4
1997	24.3	69.8	1.51*	25.6*	1998	1.60	27.7
1998	24.5e	70.0e	1.51	25.9	2000	1.54	26.8
1999	24.7e	70.0e					
2000	24.9e	70.0e					

e = estimate * adjusted

Chart 6.8 Grossed up estimates of numbers of cars in Britain at time of surveys and expectations in two years time



* adjusted
Base: All drivers
Source: The 1999 Lex Report on Motoring

6.4 Car replacement cycles

Expected replacement cycles shortened this year for the second year in succession, having been fairly constant throughout most of the 1990's. In particular the fall occurred in the private car market - in 1996 average replacement cycles were 4.7 years, but they have now fallen to 4.1 years. Average replacement cycles also appeared to shorten in the company car market this year, from 3.1 to 2.9 years.

As the prospect of a recession mounts, replacement cycles are expected to rise as they did during the last recession - from 1989 to 1992 replacement cycles lengthened from 3.5 years to 4.2 years.

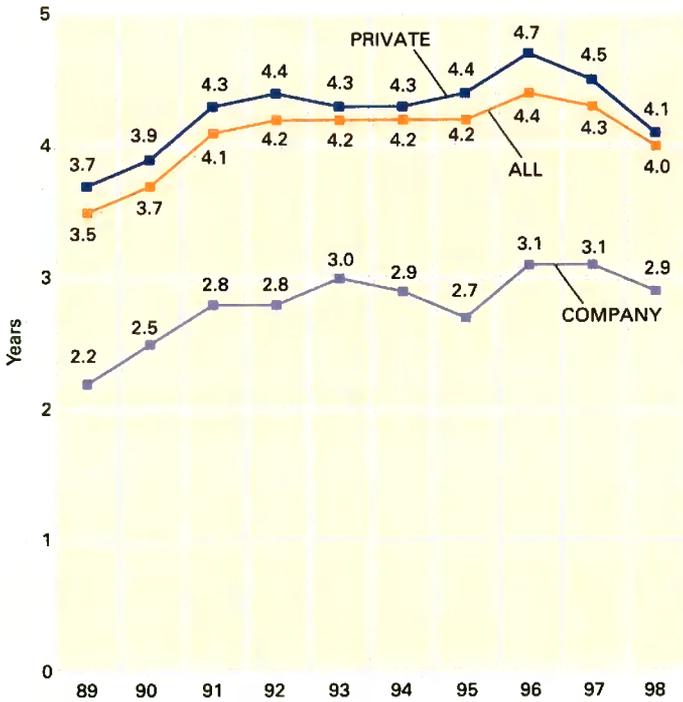
On average, new and used cars continue to have nearly the same replacement cycle.

Chart 6.9 Car replacement cycles:

Private versus company cars

Average length of ownership.

(Total period owned and expected future ownership)



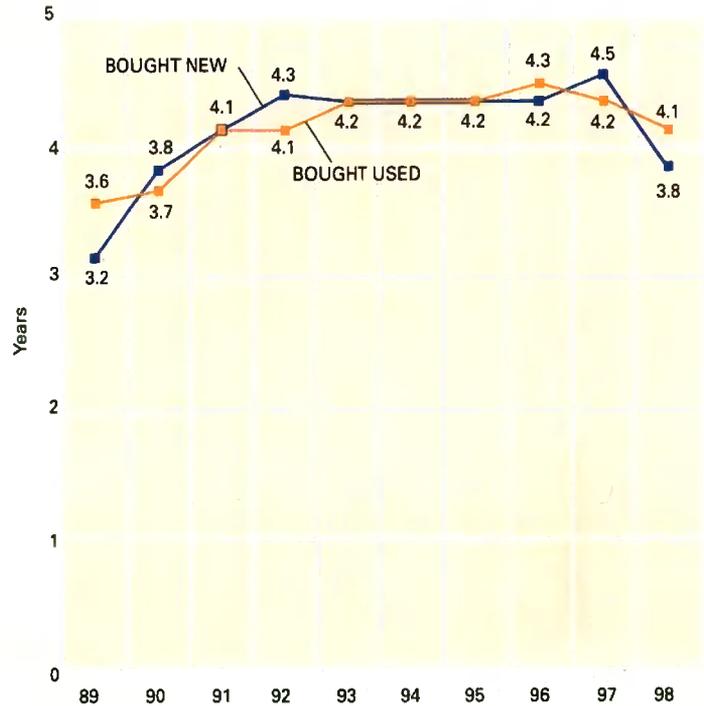
Base: All motorists
Source: The 1999 Lex Report on Motoring

Chart 6.10 Car replacement cycles:

New versus used cars

Average length of ownership.

(Total period owned and expected future ownership)



Base: All motorists
Source: The 1999 Lex Report on Motoring

6.5 Registration of new cars by manufacturer

Market share %	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1998/000s
Audi/Volkswagen	5.55	5.76	5.56	5.22	4.72	5.10	5.51	7.13	7.15	7.53	169
BMW	2.13	2.14	2.43	2.55	2.30	2.38	2.83	2.81	2.94	2.85	64
Citroen	2.89	3.03	3.36	4.04	4.54	4.42	4.12	3.78	3.66	3.41	77
Fiat	3.05	2.74	2.18	1.95	2.41	3.07	3.64	4.24	4.07	4.11	92
Ford	26.45	25.25	24.24	22.17	21.46	21.91	21.11	19.60	18.26	17.96	404
GM/Vauxhall	15.21	16.08	15.62	16.70	17.09	16.25	15.12	14.02	13.57	12.59	283
Honda	1.17	1.58	1.77	1.68	1.74	2.00	2.35	2.47	2.56	2.72	61
Hyundai	0.37	0.35	0.50	0.59	0.52	0.64	0.72	0.94	1.18	1.27	29
Jaguar	0.62	0.53	0.36	0.35	0.35	0.35	0.45	0.41	0.44	0.52	12
Mercedes	1.23	1.32	1.30	1.41	1.19	1.53	1.68	1.77	1.96	2.31	52
Nissan	6.02	5.32	4.03	4.66	5.02	4.81	4.73	4.61	4.43	4.51	101
Peugeot	6.04	6.16	7.26	7.78	8.02	7.67	7.37	7.57	7.72	8.08	182
Renault	3.83	3.36	3.99	4.59	5.24	5.90	6.19	6.54	7.34	8.02	180
Rover	13.57	14.01	14.40	13.51	13.38	12.83	12.34	10.94	10.01	8.63	194
Saab	0.53	0.59	0.58	0.62	0.51	0.49	0.59	0.73	0.77	0.86	19
Toyota/Lexus	1.84	2.12	2.59	2.65	2.93	2.72	2.80	2.99	3.34	3.68	83
Volvo	3.55	3.29	2.94	2.72	2.46	2.18	2.04	1.67	1.87	1.67	36
Others	6.32	6.72	7.40	7.41	6.12	5.75	6.41	7.77	8.74	9.3	209
Total market (millions)	2.30	2.01	1.60	1.60	1.78	1.91	1.94	2.03	2.17	2.25	2,247

Source: The Society of Motor Manufacturers and Traders

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is yours

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new Lantia
and either

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or 3 years
or 3 years plus 3 months

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In this section attitudes to car buying and servicing are examined, together with analysis of historic trends.

7.1 Motorists' attitudes to car buying

What are the major likes and dislikes of buying a car...?

When asked what were the best things about buying a new car, the answers fell in to three main categories:

Anticipation: The idea of having a new, up to date, car

Choosing: Looking around, test driving, choosing colours and specification

Owning: Getting a better, more reliable, safer car

A third of motorists like nothing about buying cars - four in ten women feel this way about buying cars.

When asked what they disliked most about buying a new car, the responses again fell into three main categories:

The cost: The pain of finding and arranging the money to buy the car

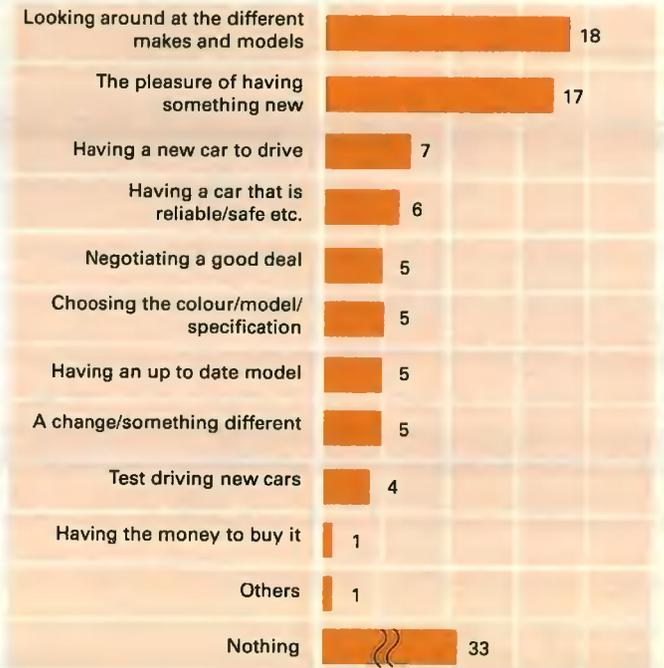
The sales process: The pressure exerted by salesmen, negotiating the price etc.

The uncertainty: Worries about getting an unreliable car or being "ripped off" by the seller

Around one in four of both men and women disliked nothing about the process of buying a car.



Chart 7.1 Factors liked about buying a car



Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

%

Chart 7.2 Factors disliked about buying a car



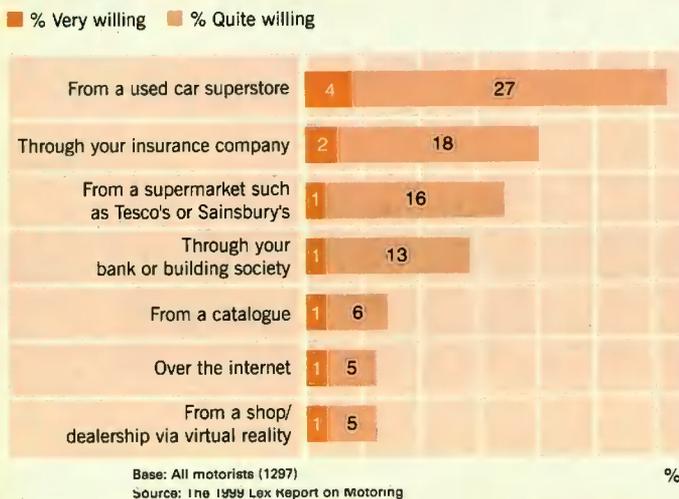
Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

%

7.2 Attitudes to new retail formats

It is possible that after the end of the current block exemption from European competition laws in the early part of the next millennium, there will be a rise in alternative retailers selling cars to the motoring public. Motorists were asked which of a range of these new potential sources of cars they would be willing to buy from.

Chart 7.3 Willingness to buy cars from alternative sources



There appears to be a general reluctance to consider alternative methods of buying cars. A third of people would be willing to buy from a "used car superstore", which is an established if relatively new means of buying cars. In comparison with that, the idea of buying through an insurance company, supermarket or bank is relatively well received.

At the moment very few people can imagine buying a car over the internet, from a catalogue or through a high street shop where you would be able to view cars using virtual reality.

Younger motorists are slightly more willing than older generations to consider buying through a catalogue or from a used car superstore, although they are still very conservative about buying over the internet.

7.3 Source of purchase

Of the two million new cars bought each year, the vast majority are bought through solus dealerships - 74% of those who can recall say they bought through a franchise dealer selling just their make.

Of the 14 million used cars bought over the past two years, three in ten were bought from a used car dealer - this proportion has doubled since it was first measured in 1989. More than four in ten used cars are bought privately or through a friend or relative.

The proportion of used cars bought through new car dealers has fallen for the second year running. In 1996 it was the most common source of purchase of used cars, but only represented around a quarter of all used car purchases this year.

There are clear differences in the source of purchase for used cars of different ages. Younger used cars (under 3 years old) are more likely to be bought through new car dealers (50%). Middle aged cars (3 - 6 years old) are more likely to be bought through used car dealers (38%). Older cars (over 6 years old) are more likely to be bought privately (60%).

Chart 7.4 Source of purchase

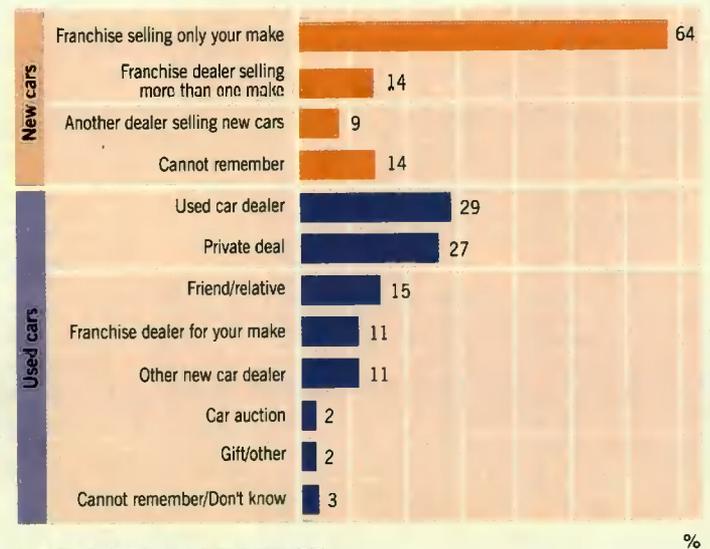


Chart 7.5 Source of purchase - used cars by age of car

	All	Up to 3 years	3-6 years	Over 6 years
	%	%	%	%
Used car dealer	29	27	38	29
Private deal	27	9	12	41
Friend/relative	15	15	12	17
Franchise dealer for your make	11	29	15	2
Other new car dealer	11	21	18	6
Car auction	2	0	2	4
Gift/Other	5	0	2	2

Base: Bought used car in the last two years (343)
Source: The 1999 Lex Report on Motoring

Chart 7.6 Source of purchase - used cars



Base: Bought used car in the last two years
Source: The 1999 Lex Report on Motoring

7.4 The prices paid for new and used cars

The prices people paid for new company cars appears to have remained broadly static over the past 12 months, at around £15,900.

The prices people have been paying both for new private and used private cars have also remained static since last year's report at around £10,600 and £4,200 respectively. This flattening of the market follows a period of five years when people were upgrading the type of cars they were buying and therefore the prices they were paying.

Chart 7.7 The purchase cost of car driven most often

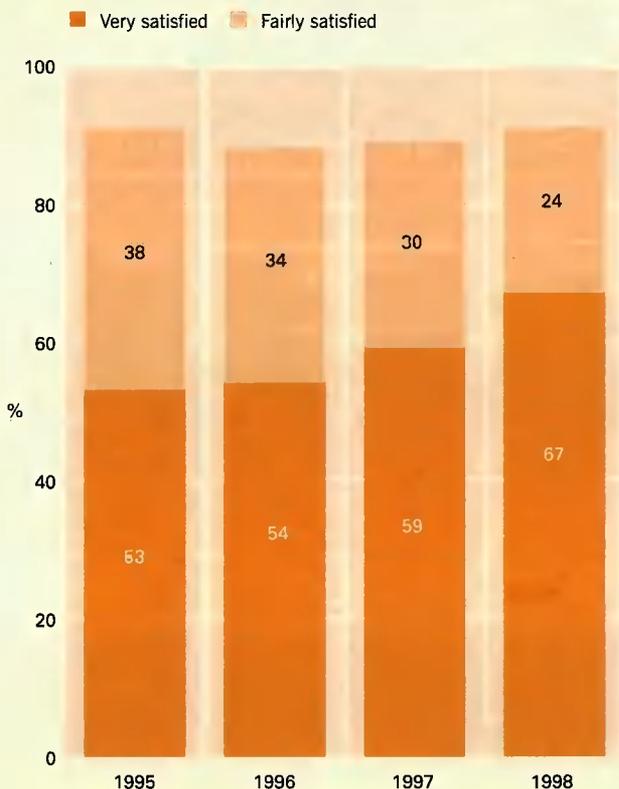


Base: All drivers
Source: The 1999 Lex Report on Motoring

7.5 Consumer satisfaction with car buying

The level of satisfaction expressed with respect to car dealers has risen steadily over the past four years. 67% of car purchasers are now "very satisfied" with the dealer from whom they bought their last car, having risen from 53% in 1995.

Chart 7.8 Level of satisfaction with car dealers



Base: All who bought last car through dealer (don't knows excluded)
Source: The 1999 Lex Report on Motoring

7.6 Service locations

Choice of service location has remained broadly static since 1988. Servicing by a main dealer for the make is still the most popular source of servicing (32%), with servicing by other garages accounting for 29% of motorists' needs. The major fall has been in DIY servicing - down seven percentage points over the past ten years.

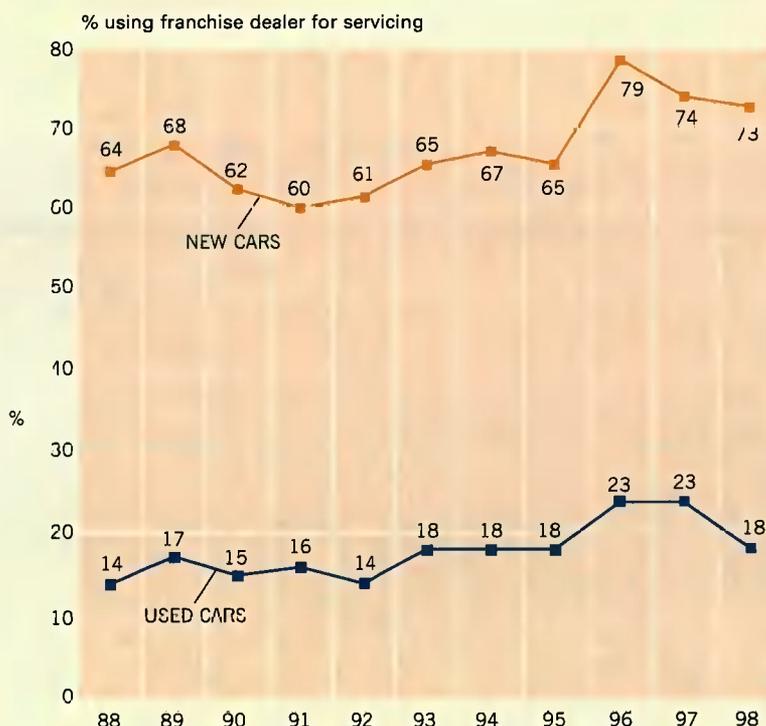
Three quarters of cars owned from new are serviced through franchised dealers (up from two thirds in 1998). One in five used car owners also use franchised dealers for servicing.

Chart 7.9 Service location

	1988	1998	net change
	%	%	%
Serviced by main dealer	31	32	+1
Serviced by garage/workshop	29	29	0
Friend/acquaintance	15	15	0
Do it yourself	23	14	-7
Service centre	1	2	+1
Mobile service unit	1	3	+2
Main dealer for different make	3	3	0
Other	0	1	+1

Base: All with responsibility for getting car serviced
Source: The 1999 Lex Report on Motoring

Chart 7.10 Service location for new and used cars



Base: All with responsibility for getting car serviced
Source: The 1999 Lex Report on Motoring.

7.7 Frequency of service and repair

After the first year, cars of all ages are serviced approximately every eight months. The frequency of repair increases over the lifetime of the car from 0.3 repairs per year for new cars to 1.2 repairs per year for cars over 10 years old.

Chart 7.11 Frequency of servicing and repair by age of car

Age of car Up to...	Average number of services	Average number of repairs
1 Year	1.0	0.3
2 Years	1.5	0.4
3 Years	1.6	0.5
4 Years	1.4	0.8
5 Years	1.3	0.6
6 Years	1.6	0.8
7 Years	1.7	0.8
8 Years	1.4	0.8
9 Years	1.6	0.9
10 Years	1.4	1.1
10 Years+	1.2	1.2

Base: All motorists (1297)
Don't knows are excluded from the analysis
Source: The 1999 Lex Report on Motoring

7.8 Satisfaction with service

Chart 7.12 Satisfaction with servicing



(Re-percentage excluding those who answered "don't know")
* Net satisfaction is the percentage "satisfied" minus the percentage "dissatisfied"
Base: All who get car serviced by a dealer/garage/service centre/unit
Source: The 1999 Lex Report on Motoring



7.9 Desired improvements to cars

What would motorists like to see improved on their cars and what are they happy with...?

Respondents were asked in this year's survey which aspects of their car's performance they were happy with and which aspects they would like to see improved.

Chart 7.13 Desire for improvement in features of current car

	% happy with on current car	% want significant improvements on next car	Ranking of desired changes
Driver comfort	67	12	8 =
Reliability	60	15	7
Ease of driving	57	10	14 =
Fuel efficiency	51	27	2
Passenger comfort	49	10	14 =
Storage space	42	11	10 =
Acceleration	36	12	8 =
Styling of the car	35	11	10 =
Safety in an accident	30	28	1
Entertainment system	28	8	16
Top speed	28	6	17 =
Fun of driving	27	6	17 =
Security/theft protection	27	25	3
Service intervals	27	11	10 =
Rust and corrosion protection	26	20	4
Environmental friendliness	25	17	5 =
Fault indicators	21	11	10 =
Length of warranty	20	17	5 =
Information on the car's performance	18	6	17 =
Communications (telephones)	3	4	20
None of the above	1	11	n/a
Don't know	20	25	n/a

Base: All drivers (1297)
Source: The 1999 Lex Report on Motoring

Answers to these two questions can be put into four categories:

1. "Can't get enough"

Motorists are generally happy with these areas, but still want more improvements:

- Driver comfort
- Reliability
- Fuel efficiency
- Acceleration
- Storage space

2. "Fine as it is"

Motorists are generally happy with these areas and are not that bothered about further improvements:

- Ease of driving
- Passenger comfort

3. "Must do better"

Areas where motorists are not happy with the current features and desire improvements:

- Styling
- Safety in an accident
- Security - theft protection
- Service intervals
- Corrosion protection
- Environmental friendliness
- Fault indicators
- Length of warranty

4. "Not brilliant but not essential"

Areas where current provision is not brilliant, but motorists are less bothered about getting immediate improvements:

- Entertainment system
- Top speed
- Fun of driving
- Information on car's performance
- Communication (telephones)





Section eight profiles the cars on Britain's roads and the nation's motorists. It also highlights some key differences between the regions.

8.1 Profile of Britain's car drivers

	Car drivers	General public
	%	%
Sex		
Male	60	48
Female	40	52
Age		
17 - 34	30	35
35 - 54	43	33
55+	28	32
Class		
AB	20	21
C1	30	27
C2	26	23
DE	23	29

Base: All car drivers (1297)
Source: The 1999 Lex Report on Motoring

8.2 Profile of new car buyers

	1988	1998
	%	%
Sex		
Male	69	60
Female	31	40
Age		
17 - 34	19	26
35 - 54	40	42
55+	41	32

Base: All who recently bought new cars
Source: The 1999 Lex Report on Motoring

8.3 Profile of used car buyers

	1988	1998	1998
	%	%	Millions
Sex			
Male	67	68	4.8
Female	33	32	2.2
Age			
17 - 34	46	38	2.7
35 - 54	36	44	3.0
55+	19	18	1.3

Base: All who recently bought used cars
Source: The 1999 Lex Report on Motoring

8.4 Profile of company car drivers

Company car drivers are much more likely to be men than women - 80% of company car drivers are men. Company car drivers are also much more likely to be middle-aged than the motoring population as a whole.

The company car is increasingly a tool of work rather than just part of a remuneration package. In 1993, 15% of company cars were "perk" cars, this has fallen to a new low of 3% in this year's survey. 82% of company car drivers now describe their car as an "essential part of my job".

Chart 8.4 Profile of company car drivers

	1988
	%
Sex	
Male	80
Female	20
Age	
17 - 34	27
35 - 54	58
55+	14

Base: All who drive company cars (328)
Source: The 1999 Lex Report on Motoring

Chart 8.5 The importance of company cars in the workplace

%	1993	1994	1995	1996	1997	1998
Essential part of your job	69	71	73	77	77	82
Helpful part of your job	12	10	13	12	13	10
Part of remuneration package	15	8	7	11	9	3
No opinion	4	11	4	0	0	5

Base: All who drive company cars
Source: The 1999 Lex Report on Motoring

8.5 Profile of Britain's cars - new versus used

	All cars	Bought new car drive most often	Bought used car drive most often
New versus used	%	%	%
Bought new	24	100	0
Bought used	76	0	100
Type of ownership			
Bought privately	90	76	96
Provided by an employer	7	19	2
Business expense	3	5	2
Age of car			
0 - 3 years	26	71	12
3 - 6 years	21	16	22
Over 6 years	52	14	66

Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

Chart 8.7 Profile of Britain's cars - private versus company

	Private	All company cars	Company cars	
			Provided by employer	Business expense
	%	%	%	%
New versus used				
Bought new	20	67	77	46
Bought used	80	33	23	54
Type of ownership				
Bought privately	100	0	0	0
Provided by an employer	0	67	100	0
Business expense	0	33	0	100
Age of car				
0 - 3 years	24	57	62	47
3 - 6 years	20	20	19	22
Over 6 years	56	23	19	31

Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring

8.6 Driver profile by region

It should be noted that the 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 region. The sample of company car drivers in Scotland, however, was boosted to make comparison with the rest of Britain more reliable.

London and the South-East account for more than a third of all the 26.8 million motorists in the UK. The next biggest motoring region is the north of England with 6.2 million motorists. Scotland accounts for 2.1 million motorists.

Comparisons between the regions show that they are all fairly homogeneous in structure. There are a few interesting differences, however, which may be statistically significant:

- Motorists in London and the South-East cover less miles per year than the other regions whilst drivers in Scotland cover more miles than average
- A higher proportion of cars are owned from new in Scotland
- There are fewer multi-car households in the north of England
- There is a higher proportion of female drivers in London and the South-East

Chart 8.8 Driver profile by region

	All	London & South-East	South-West/ Wales	Midlands & East Anglia	North of England	Scotland
Millions of drivers	26.8	9.5	3.8	5.2	6.2	2.1
Total Mileage	9,300	8,500	9,800	9,800	9,300	10,800
Business mileage	3,000	2,300	3,200	3,900	2,900	4,100
% of drivers where car driven most often bought from new	25%	23%	25%	27%	23%	30%
% of regular drivers in households with more than one car	41%	42%	43%	46%	33%	42%
% of drivers who are female	40%	44%	39%	38%	39%	36%
% of drivers that are under 25 years old	7%	5%	6%	6%	9%	9%
% of drivers that are over 65 years old	15%	17%	18%	14%	11%	11%

Base: All motorists (1297)
Source: The 1999 Lex Report on Motoring



APPENDIX 1 - BASIS OF THE RESEARCH

The 1999 Lex Report on Motoring presents the analysis of two quantitative surveys conducted by Sample Surveys Limited on behalf of Lex Service PLC.

For the main drivers survey, Sample Surveys interviewed 1,297 drivers (defined as driving at least once a month) between Saturday 10 October 1998 and Saturday 7 November 1998 in 100 constituency points in Great Britain. This sample included a boosted sample of 293 company car drivers, including an additional boosted quota of 85 Scottish company car drivers.

The data have been weighted to reflect the actual GB incidence of company car drivers (responsible for their own company car), of those who drive someone else's company car and drivers who bought their car privately. Interlocking weighting factors have also been applied to reflect GB car drivers' gender and residential region.

Sample Surveys also administered a separate survey of 197 teenagers, conducted across Great Britain at the same time and in the same 100 constituency sampling points as in the main car drivers survey.

In addition to the quantitative analysis, Research Works conducted 6 group discussions on behalf of Lex Service PLC aiming at a better understanding of the nature of reliance on the car, to gauge attitudes towards issues such as congestion and pollution and to understand attitudes towards current and future transportation policy. Groups were conducted with different demographic groups in three locations around Britain.

APPENDIX 2 - STATISTICAL RELIABILITY

Any figure taken from a sample can never be taken as a precise indication of the actual figures for the total population being sampled. The figures shown give an estimate, within a small margin of error, of the actual figures.

The error margin varies with the sample size; the larger the sample is, the lower the error will be. It also varies with the actual proportion answering, so that the error is lower for a 90/10 result than it is for a 50/50 result. In order to illustrate the use of varying sample sizes and their effect on the statistical significance of results, the table below outlines the degree of statistical error broadly associated with different sample sizes from the car drivers survey.

Sample size	Percentage error	
	90/10 result	50/50 result
1,300	+/- 2	+/- 3
700	+/- 2	+/- 4
600	+/- 2	+/- 4
500	+/- 3	+/- 4
400	+/- 3	+/- 5
300	+/- 3	+/- 6
200	+/- 4	+/- 7
100	+/- 6	+/- 10

For example, from a sample of 1,300, if 50% answered in a particular way, the true range is between 47% and 53%.

APPENDIX 3 - LEX REPORT ON MOTORING INDEX 1989 - 1999

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Buying a car											
Best time to view	59										
Financing the car	57	92	91	98	80	70	131	91	62	79	
Car ownership, changes in				44							
Choosing a car	46	90			89					83	66
Commitment to manufacturer				89		72		59			
Cost of car					73	72	98	98	67	84	68
Dealers visited	57	86		96	84	74					
Deciding where to buy a car/new formats	52		96	86	93	74			66		67
Discounts							100				
Distance travelled to buy					94						
Extra car expectations			42			37					
Features in current/next car		106			90	104	54	44			71
Fixed versus negotiated prices/bargaining				92			101				
Improvements by manufacturer							66				
Information sources, trust of	89						72				
Mileometers, accuracy		86									
Nearly-new cars		85						68			
New & used car buyers, profiles			90	80		65	96	111			
Next car purchase new/used	84	104		82	57	56					
Numbers buying a car	42	81		81	69	63	92	110	64	81	
Part exchange				100	74						
Personal service when buying a car	55						85				
Reasons for buying car now	44	82			72		72				
Registration letter										/1	
Satisfaction with sales experience		88				86		70	68	85	69
Service and parts with car sales				88	95						
Shopping for a car					86	78		70			15
Single franchise outlets				84							
Source of purchase of car	50	83	92	84	76	66	59	94	64	81	67
Test drives	57	80		96	85						
Timescale for purchase process					83						
Treatment of women	18	94									54
Type of car bought							97				
Used car money back/exchange		102	90								
Used car retailing	46										
Virtual reality, buying by							102		56		
Who helps chose car	48										
Car ownership											
Britain's cars	7	40	28	29	30	130	126	118	82	98	75
Car bought new/used	42	81	90	80	68	63	94	110	64	95	
Car ownership expectations	38	42	36	38	32	52	33	82	54	73	61
Car replacement or additional	42			82							
Choice of car								51			
Drivers in household					40						
Effect of economic climate			40	46	50		79				61
Increase/decrease in car ownership				42	36	54	80			19	
Length of car ownership			34	36	42	58	47	85	56	75	62
Lifestyle and car ownership							49				
Likes and dislikes of car ownership								35			
Miles driven	9	32	30	30	44	60	23	19	85	100	16
Miles driven (work)		32		32	44	62	24	32	86	101	
Ownership by households	80	9	12	12	14	120	116	78	58	73	
Scrappago	80	10	14	14	16	122	118	07	50	70	
Drivers and the motoring environment											
Britain's drivers	3	18	22	22	22	126	15	24	78	94	74
Catalytic converters		52		66							
Commuting				34	48				86	14	19
Congestion, delays due to	70		52	54						34	
Congestion, problem/easing		70	84	56			26	38		44	
Cost of owning car/driving		36						40			
Diesel cars					98	110	29	106	70	87	
"Difficult to adjust lifestyle"	16	34		48	62	34	20	17	50	12	12
"Don't care what I drive"	16			48	65		127			15	

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Drivers and the motoring environment continued											
Electric cars						83	31				
Environment, who responsible for				48					87		
Free parking				78	58						
Items in car/car telephones						112					
Learner drivers					21						
Privatisation of railways			66								
Radio traffic reports		72									
Reliance for different journeys								20		34	
Satisfaction with roads	34									30	
School run							65			36	46
Shopping										35	38
Threats to environment	20							62			
Use of car	12		48	65			22				
Use of unleaded petrol	26	51	88	66	56	108	32	108			
Women drivers					42						
Would use car less if public transport better	16	34	68	72	66	34	20	58	50	13	32
Driving											
Accidents and causes										26	
Annoying behaviour								44			
Behaviour to other drivers							39				
Best drivers - men or women	18									26	
Cyclists, provision for		77									
Driving fast							19	46		16	
In-car behaviour										24	
Motorways		74				102					
Pleasure and problems of driving			50				17	37		15	12
Road signs		76	60		120						
Road-rage/anger/stress			56					42	18		
Standard of driving	20							47	12		
Europe											
Buying cars in Europe			100								
Car ownership	81	11	17	17	18	124	120	89	51		
Channel Tunnel use	40	108	124	124	61	117					
Continental trips					60	116					
Law											
Attitude to MOT		59			114					46	
Attitude towards breaking speed limits										16	
Consumer protection					96						
Disabled stickers		58									
Drinking and driving		62				28	41		20		
Driving misdemeanours		56					39				
Driving offences			62		124					14	
Drugs and driving										20	
Jumping red lights	64						41				
Law breaking and traffic control		62		126							
Misuse of disabled stickers		58					40				
Protests against new roads								57			
Speed cameras					115	135	42			40	
Speed limiters			64		116						
Traffic wardens/clamping	32										
New car sales											
Registrations UK and Europe	76	11	15	15	17	123	119	88	52	72	
Trends and forecasts						15	76	81	52	22	
UK market shares by manufacturer	12	16	16	19	125	121	90	59	77	78	63
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 - age passed				52							
Driving test effectiveness		64			112				34		51

Policy continued	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Policy continued											
Driving test, written section					112				34		
Environment/traffic congestion			74			21	26	38		28	24
Importance of car industry		69			128						
Motorway tolls						23					39
Non-use of public transport			72				20	58			26
Parking taxes											33
Park and ride				74	52						
Paying for public transport				72				60		49	
Petrol tax versus road fund licence		37		71						47	41
Pollution versus congestion			76			128					24
Road pricing			82							49	
Road tourist signs			67		118						
Support for transport policies			78	68			28	52		44	
Traffic growth										18	
Transport telematics/technology				76						51	
White Paper-A New Deal for Transport											30
Use of public transport			70				20	58			37
Safety											
Children and seat belts		66		60			70				
Dogs in cars		67									
Effectiveness of safety campaigns				62					32		
Factors contributing to road safety		60					43		37		
Safety features on car		22				27	55	66	44		
Security											
Car theft - car or radio	28				122	32					
Concerns about crime						32					
Experience of crime						140					
Night time parking/garages	30		46	50							
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	92	
Distance to travel for service	61				105						
Frequency of service and repair					106	96	108	104	72	90	70
Importance of servicing	61		114								
Loyalty to location						93					
Satisfaction with servicing	65	100	116	118	110	98	112	73	74	91	70
Service intervals						108	92				
Service records							110				
Servicing modern cars					104						
Specialist versus franchise dealers	67	102									
Treatment of women											54
Who services car	63	96	112	116	102	90	104	102	71	89	69
Teenagers											
Activities						114					
Concern about alcohol						47					
Concern about environment						47					
Driving test, changes to											51
Features sought on car						46	66				
Getting their first car							68				
Interest and reliance on the car						45	63				46
Use of the car						17					
Views on parents' cars						71					
Views on parents' driving						115					49
Views on transport policy											48
Trucks											
Changing size of trucks								62			
Congestion and pollution										50	
Driving standards									12		
Profile of truck drivers									84		
Reliance of industry on trucks								33		65	
Route planning										62	
Transport operators' views on use of trucks						55					
Transport telematics										61	

APPENDIX 4 - SOURCES AND ACKNOWLEDGMENTS**Motor Industry of Great Britain 1998 World Automotive Statistics**

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Department of the Environment, Transport and the Regions

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