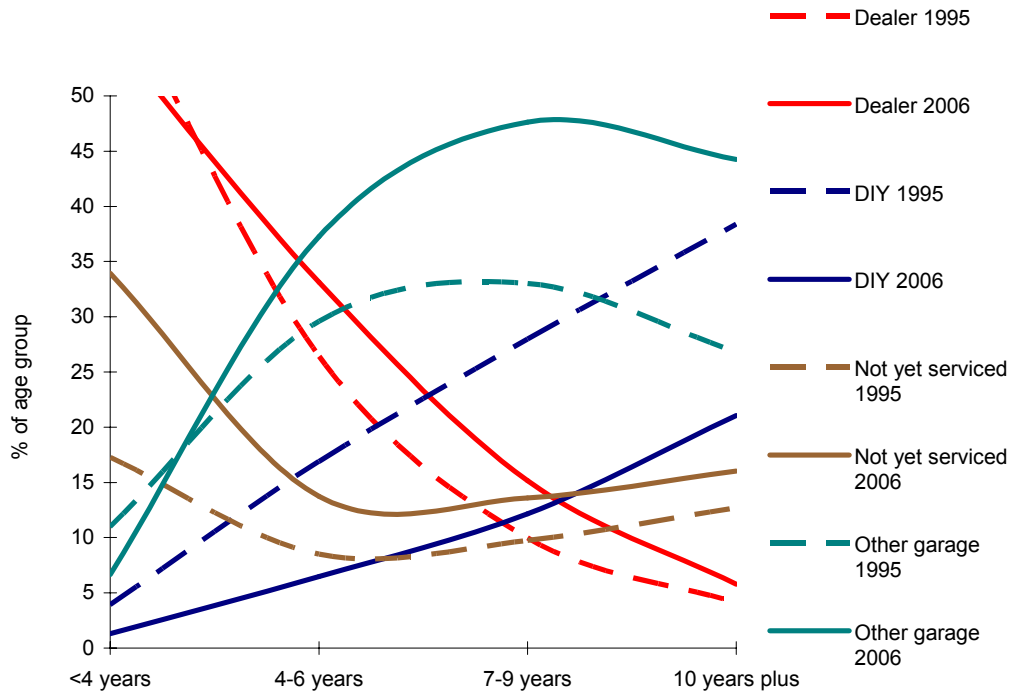


Sample weighted average service retention compared with 1995



The graph shows how since 1995 franchised dealers have gained with older cars, but lost out on <4-year-old cars. A decline in service retention for <4-year-old cars has also occurred among 'other garages', but to a lesser extent. The cause of the decline in service retention for cars aged <4-years is the large increase in 'not yet serviced' responses for this car age group.

Independent garages have certainly gained ground with cars aged 4+ years, as have franchised dealers, but the gains for independent garages have been much greater and reach into the 10 year plus parc. The big loser of service retention has been the DIY sector with a large decline in DIY servicing apparent for older cars.