CASTROL PROFESSIONAL
CAR SERVICE & REPAIR
TREND TRACKER 2008

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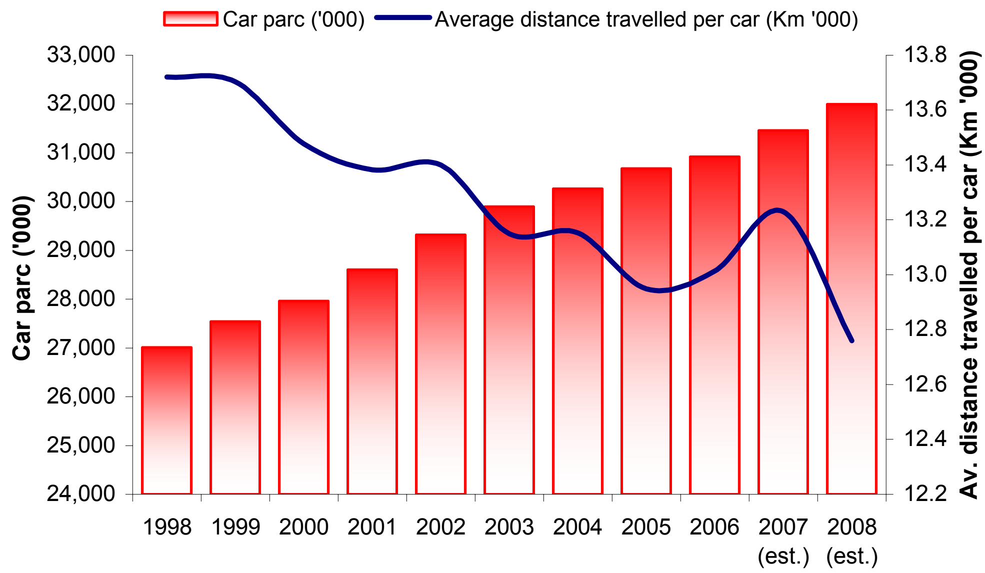
Annual Mileage

The average distance travelled by cars in the car parc has tended to fall despite and possibly because of a rise in affluence. Growth in car ownership tends to coincide with a growth in affluence as car ownership per household increases due to higher incomes and greater wealth. This does not necessarily result in a higher level of usage per car, although gross mileage may continue to rise.

Figure 11 – Average annual distance travelled per car in the car parc, 1998-2008

	Number of cars in the car parc		Billion vehicle kilometres (cars)		Average distance travelled per car	
	'000	Index	Km (bn)	Index	Km ('000)	Index
1998	27,010	100	370.6	100	13.7	100
1999	27,540	102	377.4	102	13.7	100
2000	27,960	104	376.8	102	13.5	98
2001	28,605	106	382.8	103	13.4	98
2002	29,320	109	392.9	106	13.4	98
2003	29,895	111	393.1	106	13.1	96
2004	30,267	112	398.1	107	13.2	96
2005	30,675	114	397.2	107	12.9	94
2006	30,920	114	402.4	109	13.0	95
2007 (est.)	31,460	116	416.2	112	13.2	96
2008 (est.)	31,995	118	408.3	110	12.8	93

Figure 12 – Chart of average annual distance travelled per car in the car parc, 1998-2008



Source: National Travel Survey/Transport Statistics/Trend Tracker estimates

The estimate for 2008 takes account of the huge increases in the price of fuel and the welter of economic pressures and uncertainties. There is clear evidence that drivers are driving less and driving slower as a result of the turmoil in 2008 from Trafficmaster.

New Research on 'Not Yet Serviced'

Clearly the major effect of improving vehicle quality is less frequent routine servicing and reduced service content. The former shows up as a steep rise in 'not yet serviced' responses, especially for cars less than four years old – up from 15.4% of the sample in 1995 to 33.1% in 2008. With this in mind we commissioned Synovate to add two questions to Omnicar, as follows, for a period of four months:

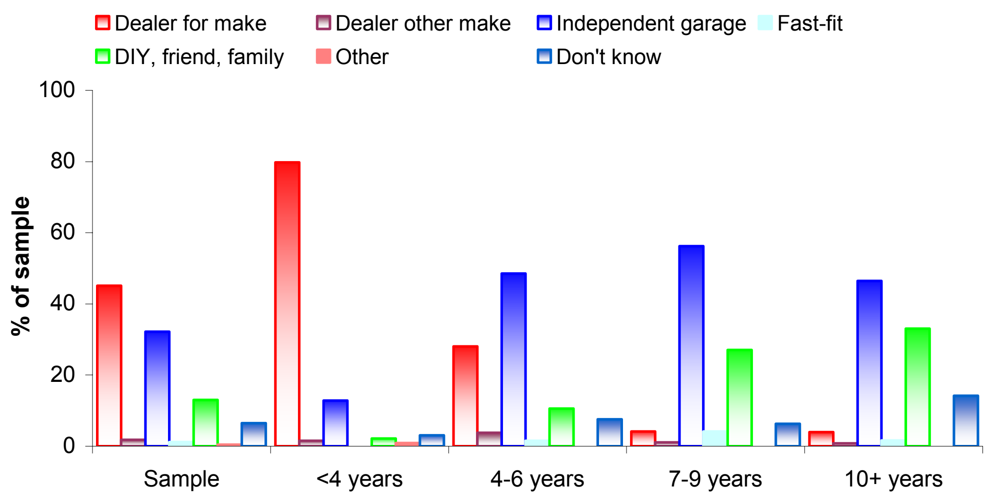
- When your car is next due for a service, where are you likely to take it?
- What is the main reason why you are likely to have your car serviced there?

These questions were only asked of interviewees who had replied 'not yet serviced' and for this reason, and because of the short period (total sample 681), we can only report the top-line results and not break them down by marque. However, we believe the results are a good indicator across all marques.

The results of the first question – where? – are very much as could be anticipated. For motorists with cars less than four years old, 'dealer for make' was the choice for 79.8% of interviewees. The same choice was made by 28.0% of motorists with cars between four and six years old, although an independent garage was the most popular choice at 48.5%. An independent garage was the majority choice for all ages over four years old, with DIY increasing steadily.

The intentions expressed are very much in line with the results for motorists reporting the actual provider of their last routine service.

Figure 56 – Intended provider of routine service by age, 2008



Source: Synovate

Our second question – why? – gave interviewees 12 choices, but the chart (Figure 57, next page) only reports eight choices plus 'other' and 'don't know'. Four choices – changing car, company policy, lead time and recommendation – produced almost no responses and have been included in 'other'.

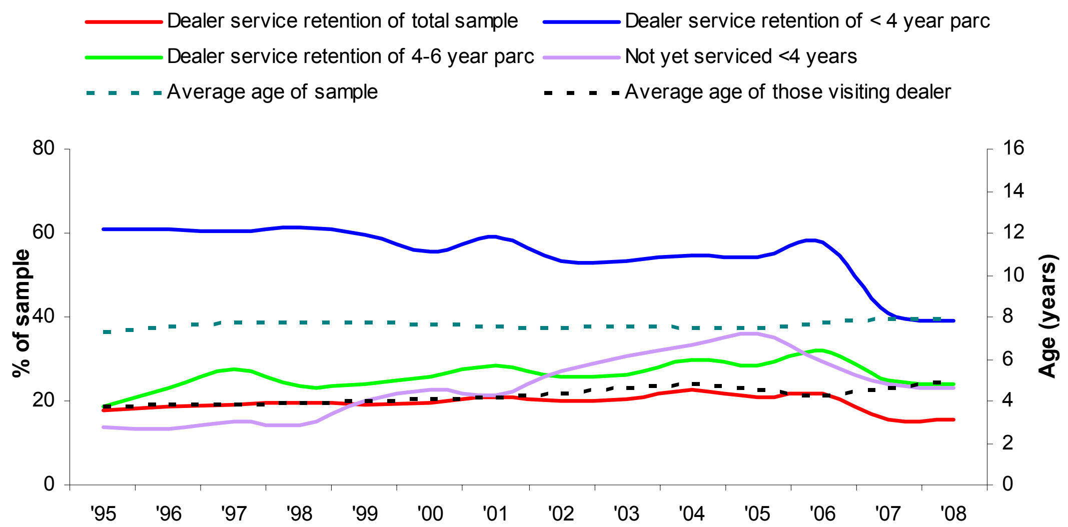
Rover

Figure 86 – 2008 servicing retention by service source and age of vehicle, Rover

Service Source	Sample % using source	Age of vehicle (% using source) < 4 years	4-6 years	7-9 years	10+ years	Average age of sample (years)
Dealer for make	15.7	39.0	24.2	11.3	3.8	5.0
Dealer for other make	3.8	9.7	2.7	4.1	2.1	6.1
Other grge/svc station	48.7	25.2	47.8	55.6	54.2	8.5
Other paid	7.6	0.0	4.7	9.3	11.3	9.8
Self/unpaid	9.5	0.9	7.5	9.5	14.1	9.6
Not yet serviced	14.0	23.0	13.0	8.7	14.4	7.4
Don't know	0.7	2.1	0.0	1.5	0.0	5.1
Response (%)/Age	100%	15%	24%	23%	38%	7.9

Source: Synovate

Figure 87 – Franchised dealer servicing retention trend, Rover

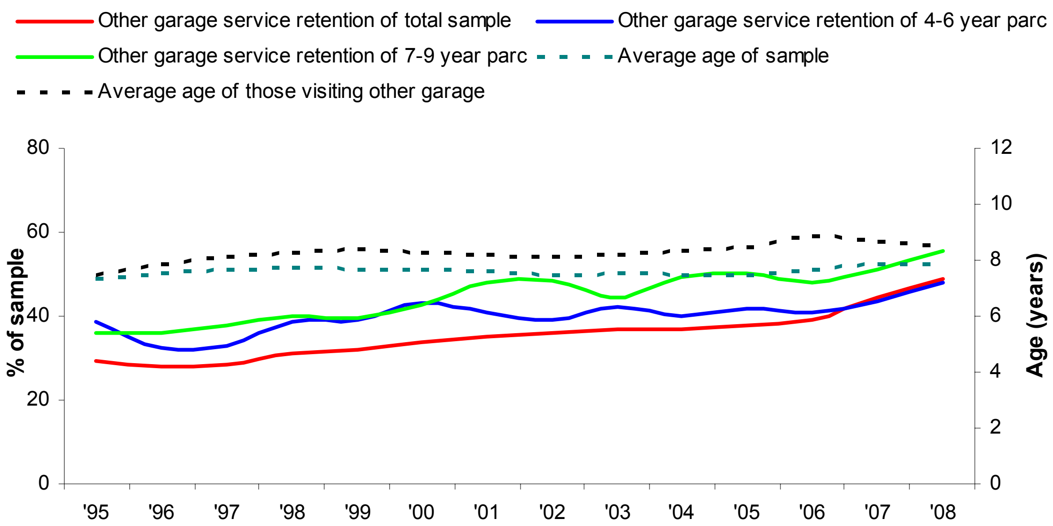


Source: Synovate

'Rover' data include MG cars. The 'dealer for make' data for Rover refer not to a conventional dealer network but to repairers authorised by the XPart service and parts network which assumed responsibility for the brand's aftersales following the demise of MG Rover. This and the lack of new sales for the marques makes comparison with other marques' data invalid.

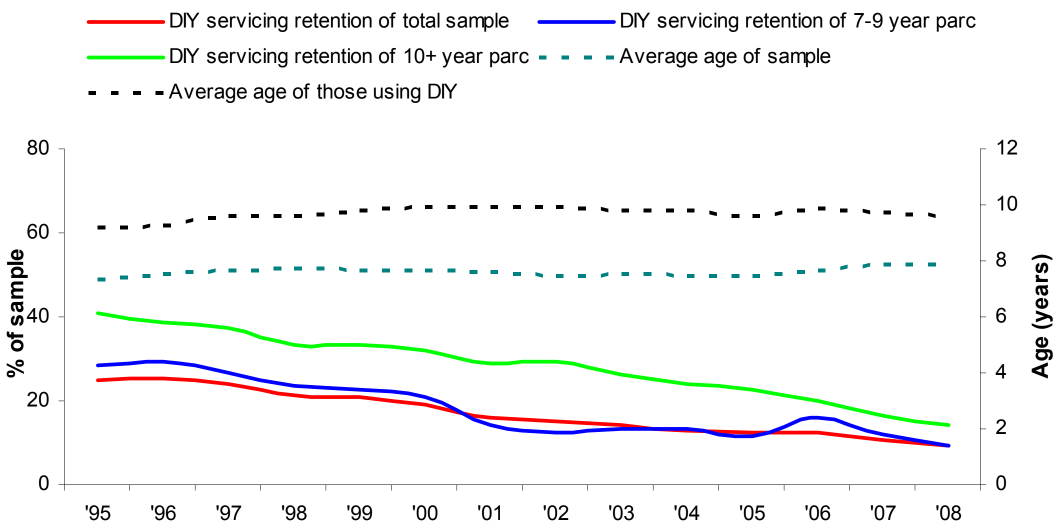
ROVER

Figure 88 – Other garage servicing retention trend, Rover



Source: Synovate

Figure 89 – DIY trend, Rover



Source: Synovate

The average age of Rovers and MGs taken to 'Other garage' (independents) has declined in the past three years, for lack of alternative servicing sources, and in the absence of manufacturer warranty cover on <4 year cars to influence owner's choices.