



Australian Automobile Association  
(AAA)

**MOTORISTS' PRIORITIES  
AND ATTITUDES**

**Executive Summary Report on  
1999 ANOP National Study**

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## **1. INTRODUCTION**

ANOP Research Services Pty Ltd was commissioned by the Australian Automobile Association (AAA) to conduct a national study of motorists' priorities and attitudes in 1999.

This is the fourth annual national survey of motorists' views undertaken by ANOP for the AAA. A particular focus of the 1999 research program was to identify differences in the priorities and attitudes of motorists in urban and regional Australia.

### **1.1 Background And Objectives**

The first ANOP national survey of motorists was undertaken in 1995. It provided the AAA with a comprehensive benchmark assessment of Australian motorists' views. Since then, subsequent national studies in 1996, 1997 and now in 1999 have monitored issues covered in the original 1995 benchmark survey but have also covered topical and emerging issues of interest to the AAA.

ANOP's 1999 study for the AAA monitors Australian motorists' agenda of issues and concerns, and then specifically gauges their attitudes to their cars, other drivers, petrol pricing issues, safety, roads and the environmental impact of cars. A key feature of the 1999 research is that in each of the issues investigated, the analysis focuses on differences found between the attitudes of urban and regional motorists.

The 1999 study of motorists' views was organised around eight main areas of investigation:

1. **Mobility and the Car** - monitoring the personal importance attached by motorists to their cars, their reported car and public transport usage, and their likelihood of using public transport more and driving less.
2. **Motorists' Agenda** - investigating the spontaneously perceived most important issues or problems personally affecting car drivers. This identifies motorists' agenda of immediate concerns and the issues of day-to-day personal relevance to them.
3. **Petrol Pricing Issues** - assessing motorists' petrol price consciousness and their concerns about petrol pricing; as well as their awareness of Federal and State government petrol taxes and the perceived adequacy of the amount of Federal government petrol tax spent on roads.
4. **Driver Behaviour** - measuring how well or badly motorists believe that they personally drive and contrasting this with their assessment of other drivers (young and older drivers, and truck drivers).
5. **Safety Concerns and Issues** - monitoring motorists' degree of concern about safety issues, and their priority order of safety concerns about drivers, roads and cars; and identifying motorists' views about how to reduce accidents among young drivers.
6. **Roads** - analysing motorists' perceptions of the current condition of major highways, major arterial roads and local roads; and gauging their attitudes to tollways for both new and existing roads.
7. **Environmental Concerns** - monitoring motorists' degree of personal concern about the effect of cars on the environment, and the nature of their concerns; and identifying the perceived importance of various measures to reduce the environmental impact of cars.

8. **Role of Motoring Organisations** - measuring the perceived importance of the involvement of motoring organisations in the issues investigated in the survey.

## 1.2 Research Methodology

As in 1995, 1996 and 1997, the 1999 research program consisted of initial exploratory **qualitative** research, followed by a **quantitative** national survey of motorists.

### Phase 1: Exploratory Qualitative Research

The qualitative research consisted of twelve focus group discussions with motorists between 3-16 August 1999. The group program was designed to provide a good spread of different types of geographic locations and over-represented regional Australia. The focus groups were held in three regional areas (Townsville in Qld, Ballarat in Vic and Mudgee in NSW), two metropolitan areas (Crows Nest in NSW, Nunawading in Vic) and one outer suburban area (Pine Rivers in Qld).

### Phase 2: National Quantitative Survey

The national survey consisted of telephone interviews with **1623** motorists between 25-30 September 1999. The questionnaire was pilot tested on 22 September 1999. Motorists were defined as regular drivers aged 18 years and over, and included members and non-members of motoring organisations. Telephone numbers were randomly selected within telephone zones. The interviews took between 15 to 20 minutes.

As the AAA is a national association representing state and territory motoring clubs, the survey needed to have a national perspective but at the same time recognise geographic differences. Thus, the ANOP survey covered all states and territories as well as distinguishing between urban and regional areas.

Smaller states and territories were over-represented to enable separate analysis of their results. However, results were weighted at the analysis stage to obtain a representative national picture.

### **1.3 This Report**

This report provides a summary of the main findings and conclusions of the ANOP national study. A more detailed analysis of the qualitative and quantitative research findings is contained in a separate document entitled "Detailed Report on 1999 ANOP National Study".

## 2. SUMMARY OF MAIN FINDINGS AND IMPLICATIONS

This executive summary provides a brief overview of the main findings and conclusions of the 1999 ANOP national study. It also includes a set of ten tables which summarise the survey results.

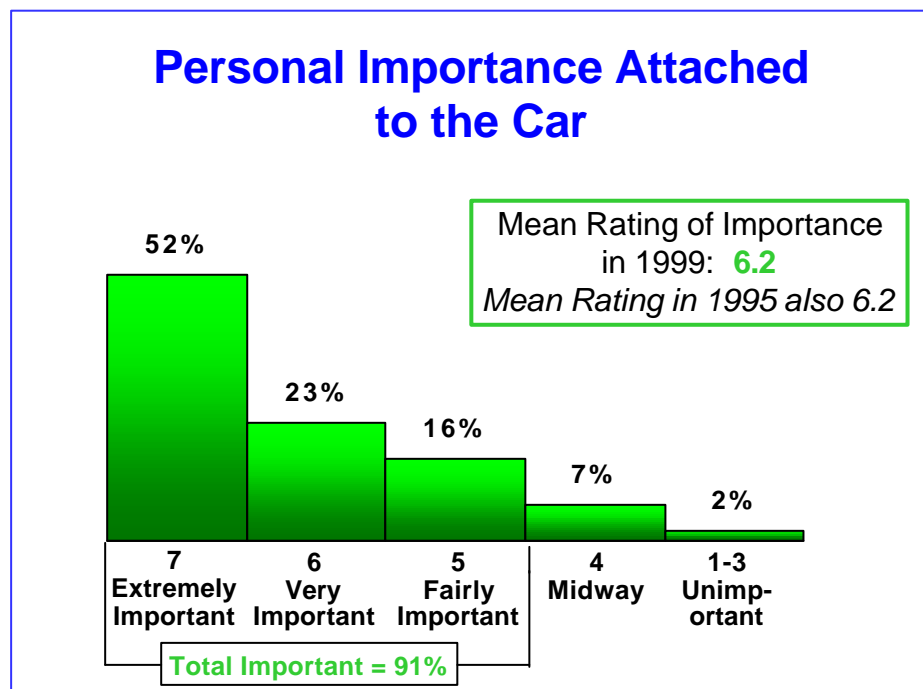
### 2.1 Mobility and the Car

*[Refer to Summary Tables 1 & 2]*

As found in previous ANOP studies, the car plays a vital role in most Australians' lives (91% rate it as important, 75% as "extremely" or "very" important). The emotional attachment many motorists have to their cars is reflected in their language. To be without the car would be like:

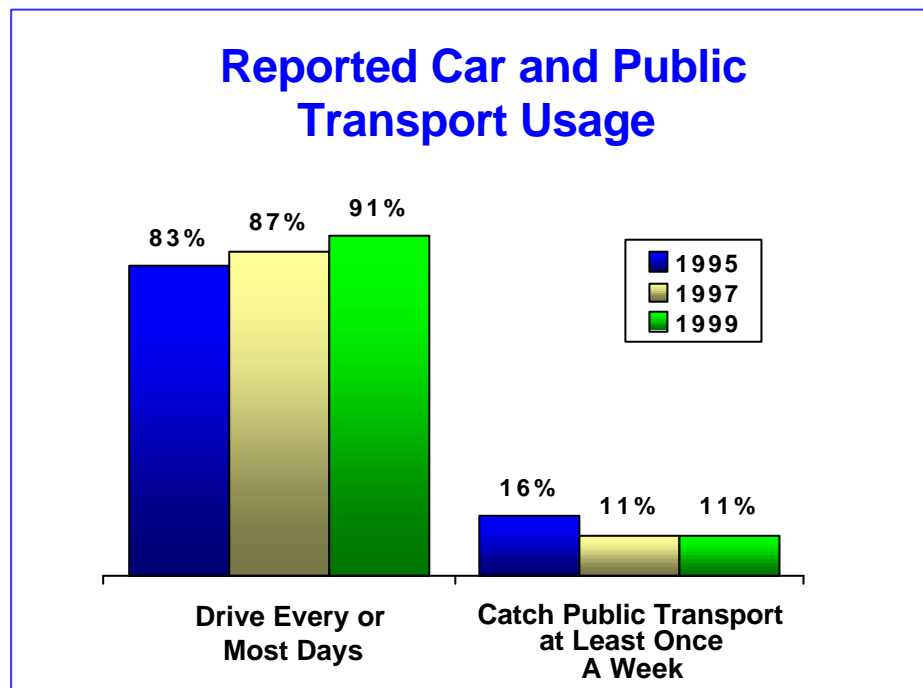
*"Having no legs."*

*"Forced retirement."*



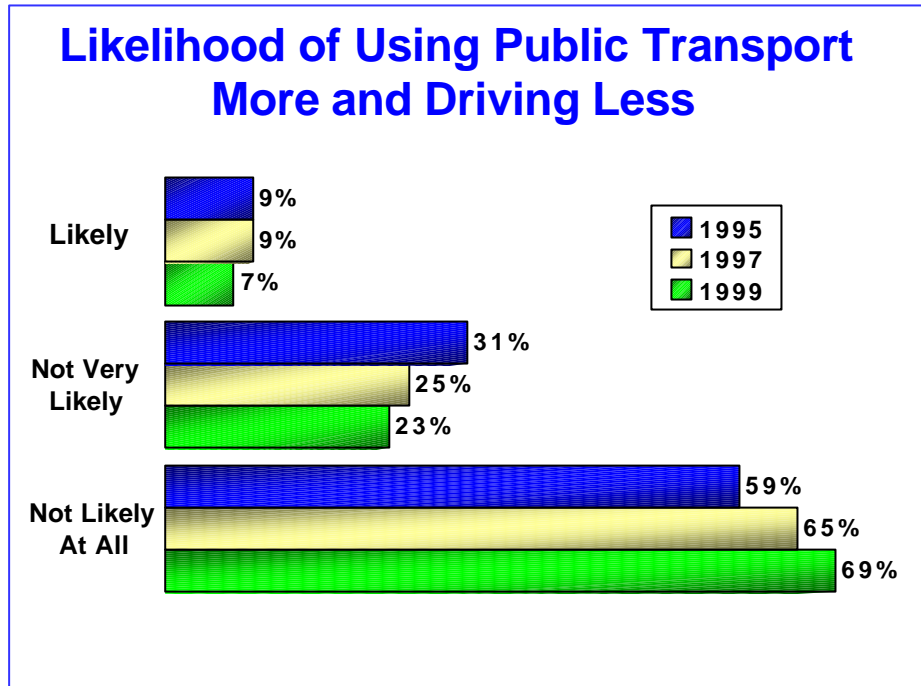
The car is even more important to those living in regional areas (94% important, 81% "extremely" or "very" important). Regional dwellers have less access to public transport and simply could not get around without the car.

A key finding of the 1999 survey is that motorists' reliance on their cars is increasing and their inclination to use public transport more is declining. There has been a significant increase since 1995 in the number of motorists who drive every or most days (from 83% in 1995 to 91% in 1999). In contrast, only a small minority (11%) catch public transport at least once a week. And while some urban dwellers use public transport to fulfil some of their mobility needs (commuting, special trips to city), public transport does not give them *all* that they want - convenience, flexibility, speed and security.



An even smaller minority in 1999 say that they would consider using public transport more and driving less at the moment (7% "likely" in 1999 compared to 9% in 1995 and 1997). Significantly, those most likely to consider increasing their public transport use already travel on public transport on a

regular basis. Thus, it is a consideration only when it does not represent a significant change in behaviour.



## 2.2 Motorists' Agenda

*[Refer to Summary Table 3]*

At the top of motorists' spontaneous list of issues or problems personally concerning them as car drivers are:

- **Motoring costs:** The single most frequently mentioned issue is the **price of petrol** (25%). When this is summarised with other costs of running a car, one-third (32%) of motorists spontaneously nominate motoring costs as a key issue to them.
- **Other drivers' behaviour:** One-third (32%) also mention being bothered by the way *other* people drive. Of particular concern are reckless, aggressive and impatient drivers.

Next on motorists' agenda of issues are:

- **Condition of roads:** a priority issue for one in five (19%) motorists overall, but this rises to one in four (24%) in regional areas.
- **Safety. Road accidents:** a spontaneous concern to one in seven (14%).
- **Traffic congestion:** also mentioned by one in seven (14%) but of greater concern in New South Wales and capital cities.

Motoring costs and other drivers' behaviour are at the top of motorists' agendas in both urban and regional areas.

The main differences between urban and regional motorists' concerns are that the condition of roads is a higher priority to regional motorists, whereas their urban counterparts are more frustrated by other drivers and traffic congestion.

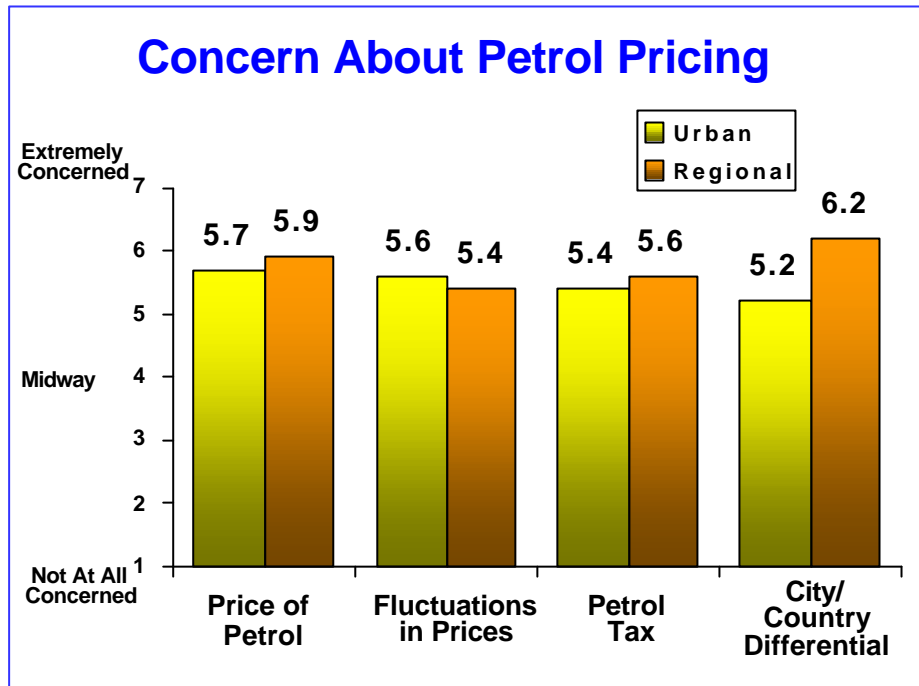
<b>Motorists' Agenda: Urban vs Regional Areas</b>	
<b>Urban Motorists</b>	<b>Regional Motorists</b>
1. Other drivers' behaviour .....34%	1. Motoring costs, petrol.....32%
2. Motoring costs, petrol.....33%	2. Other drivers' behaviour .....26%
Followed by:	3. Condition of roads .....24%
3. Traffic congestion .....18%	Followed by:
4. Condition of roads .....17%	4. Safety. Road accidents.....15%
5. Safety. Road accidents.....14%	5. Traffic congestion .....2%
- Top 5 Spontaneous Issues -	

### 2.3 Petrol Pricing Issues

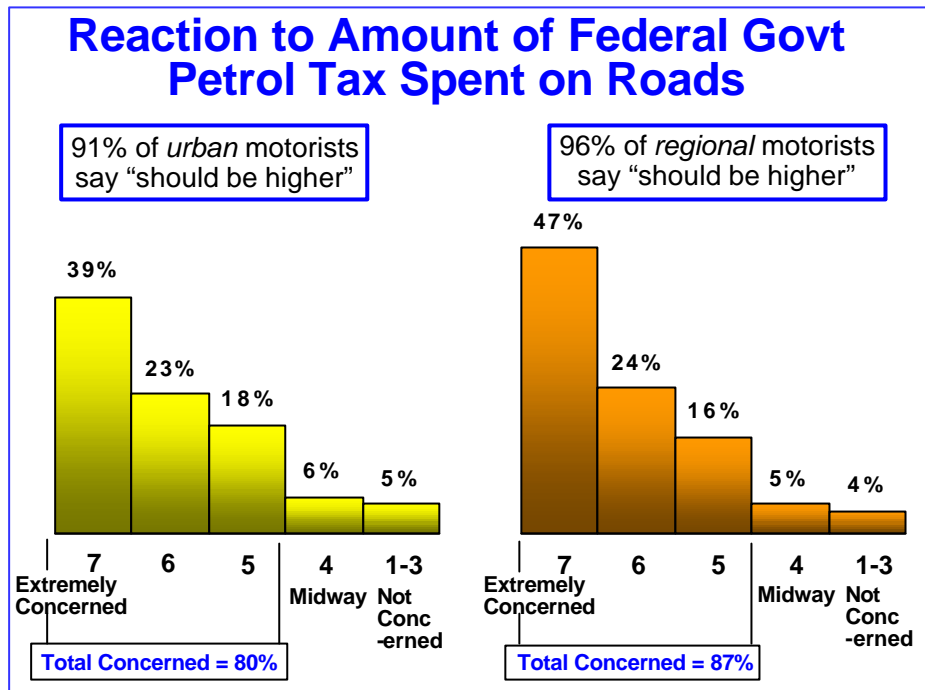
*[Refer to Summary Table 4 & 5]*

The 1999 research found that many motorists are acutely aware of the price of petrol (40% know exactly the price per litre, 39% have a fairly good idea). As

mentioned, petrol prices are a key spontaneous concern for motorists. However, motorists are not just concerned about the current price of petrol, but also about daily fluctuations in prices and, in regional Australia, the city-country petrol price difference.



In addition to petrol pricing, a major potential outcry from motorists is that more of the federal petrol tax should be spent on roads. Motorists currently tend to underestimate how many cents a litre the fuel tax is, and overestimate how much of it is spent on roads. When informed of the actual amount (6 out of every 35 cents of tax collected), motorists are outraged. This anger is more pronounced in regional areas - and has increased since 1995.

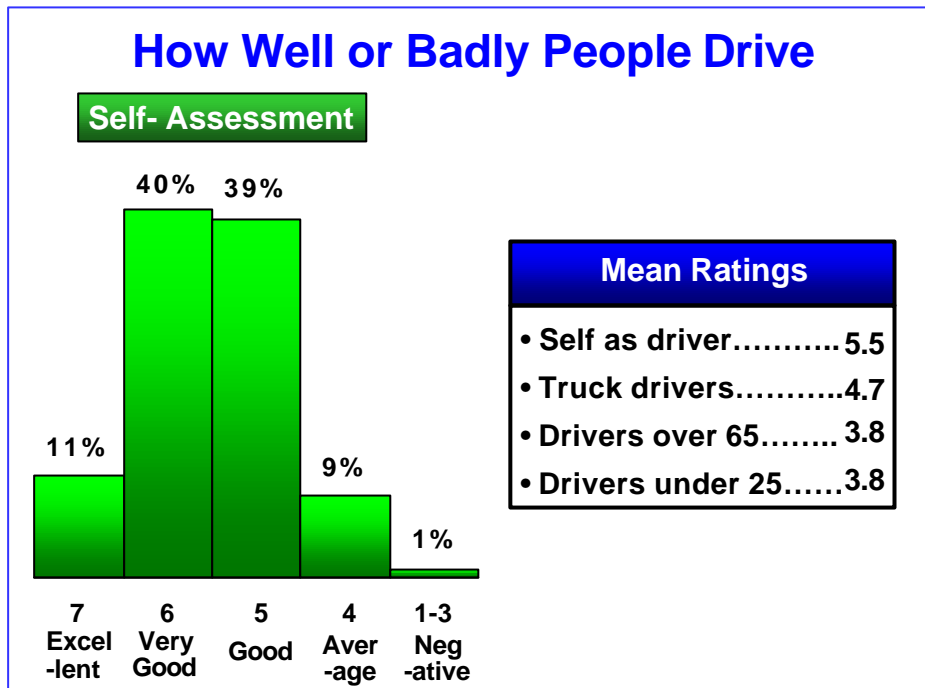


## 2.4 Driver Behaviour

[Refer to Summary Table 6]

While motorists are quick to find fault with other drivers, most have a high opinion of their own driving abilities. Over half rate themselves as very good or excellent drivers (51%), and another four in ten rate themselves as good (39%). This leaves only one in ten who see themselves as average (9%), and virtually no-one feels they are below average.

Urban motorists have a marginally higher opinion of their driving skills than those in regional Australia, however the great majority of both groups rate themselves positively (91% of urban motorists, 88% of regional motorists).



By contrast, young and older drivers are singled out for their poorer driving performance. When asked to rate drivers under 25 and those over 65, less than one-third of motorists overall rates each group positively (26% for under 25's, 29% for over 65's); around one-third judges them as average (39%, 32%); and one-third rates them poorly (32%, 37%). It is a huge contrast to drivers' self assessments.

While young drivers and older drivers are kinder in their assessments of their peers, there is still a big gap between how they rate themselves and how they rate their peer group's driving prowess.

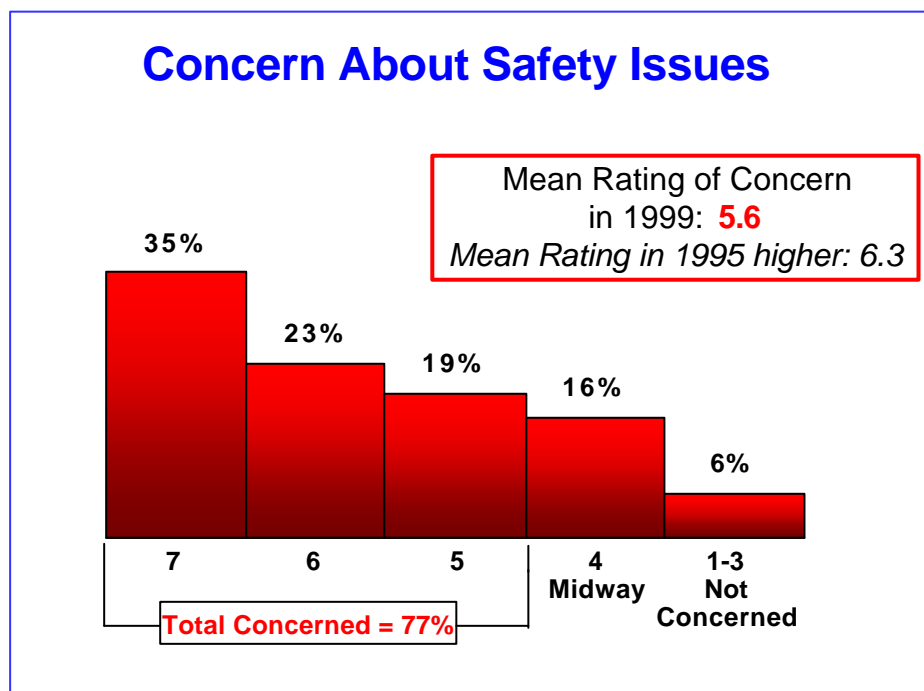
The qualitative research found that truck drivers' behaviour on the road is seen as having improved. This is confirmed by the national survey, with nearly two-thirds of motorists rating truck drivers as good or better (63%).

## 2.5 Safety Concerns and Issues

[Refer to Summary Table 7]

While the large majority of motorists indicate concern about safety issues (77%), there has been a significant decline in their degree of concern since 1995 (mean rating down from 6.3 to 5.6 out of 7). Between 1995 and 1999 there have been tangible improvements in safety: extensive road safety campaigns, enforcement measures, a reduction in the age of cars on the road, and importantly, a reduction in the road toll. Thus, safety perceptions in 1999 appear to match the reality.

Regional motorists are less concerned about safety issues than their urban counterparts (73% concerned in regional areas, 79% in urban areas).



The way **other** people drive is clearly the key safety concern of motorists - well ahead of how safe the roads are to drive on, or how safe cars are. However, the concerns raised about other drivers' behaviour are broader than

safety issues alone: they also reflect motorists' annoyance and irritation with other drivers in the day-to-day battle with traffic in urban areas.

The 1999 survey specifically investigated motorists' views about how to reduce road accidents among young drivers (as mentioned, a group rated overall as below average by other drivers). Their main suggestions are:

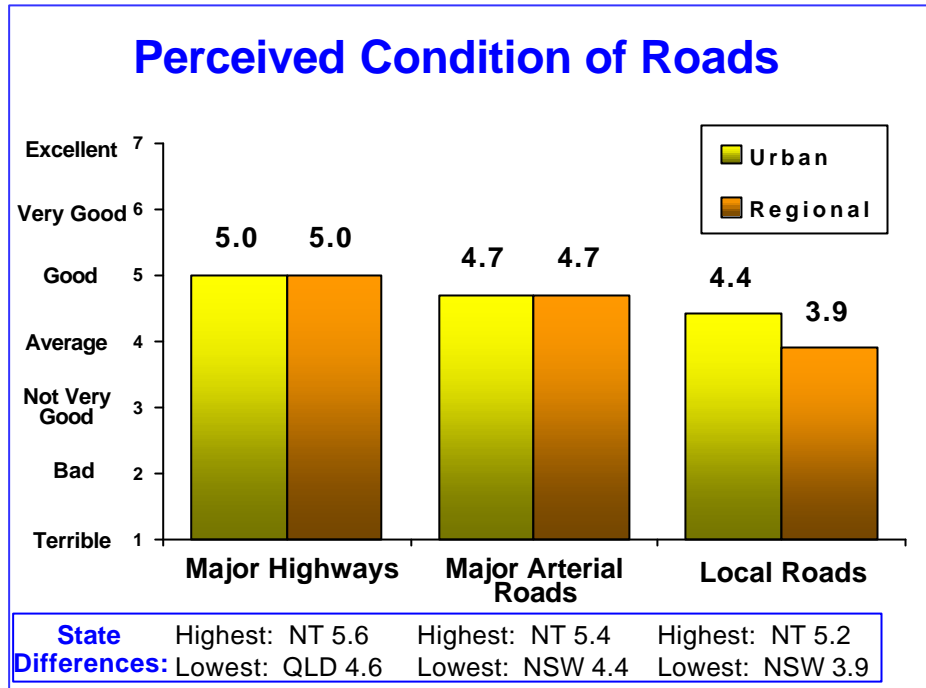
- ◇ tougher restrictions and penalties (suggested by 41%)
- ◇ more driver education and training (30%)
- ◇ review of licensing procedures (21%).

## **2.6 Roads**

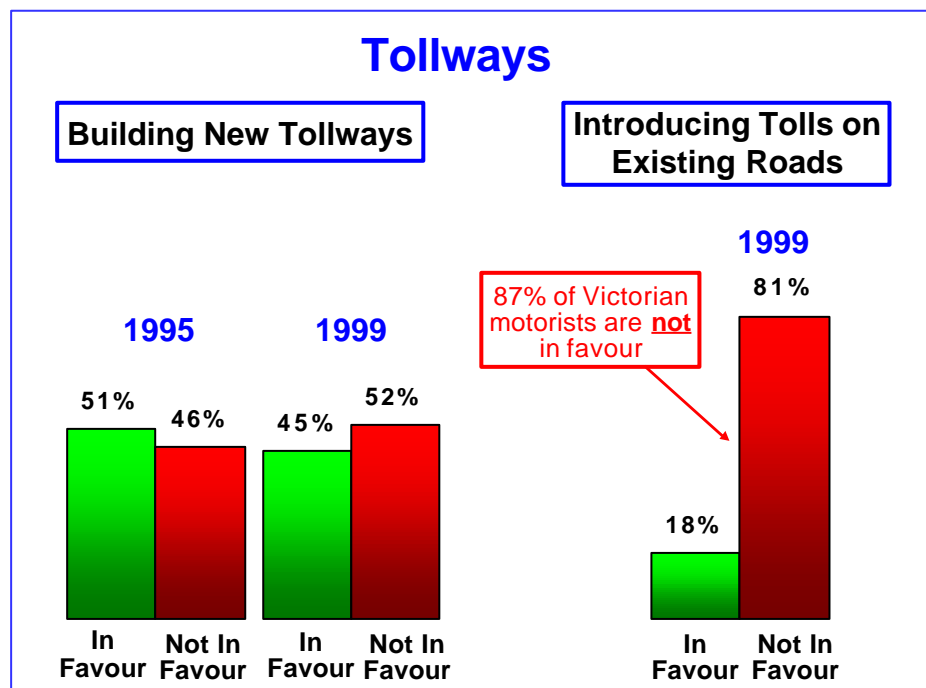
*[Refer to Summary Table 8]*

Motorists overall rate the national highways as being in good condition (mean rating 5.0 out of 7) and major arterial roads as above average (mean rating 4.7). However, local roads are seen as being just average (mean rating 4.3).

Roads are of greater concern to regional motorists, and this is reflected in the lower ratings they give to roads in their local area (3.9, compared to 4.4 from urban motorists). As mentioned earlier, the strongest call for a greater allocation of the fuel excise to roads comes from regional Australia.



Motorists are showing more reluctance to paying tolls to obtain better roads. Whereas in 1995, there was a slim majority (51%) in favour of building new tollways, the pendulum has swung to slim majority opposition (52%) in 1999. The idea of putting a toll on an existing road to help pay for its upgrading and maintenance is met with strong majority opposition (81%), especially in Victoria where the Tullamarine Freeway has become part of the City Link Tollway.



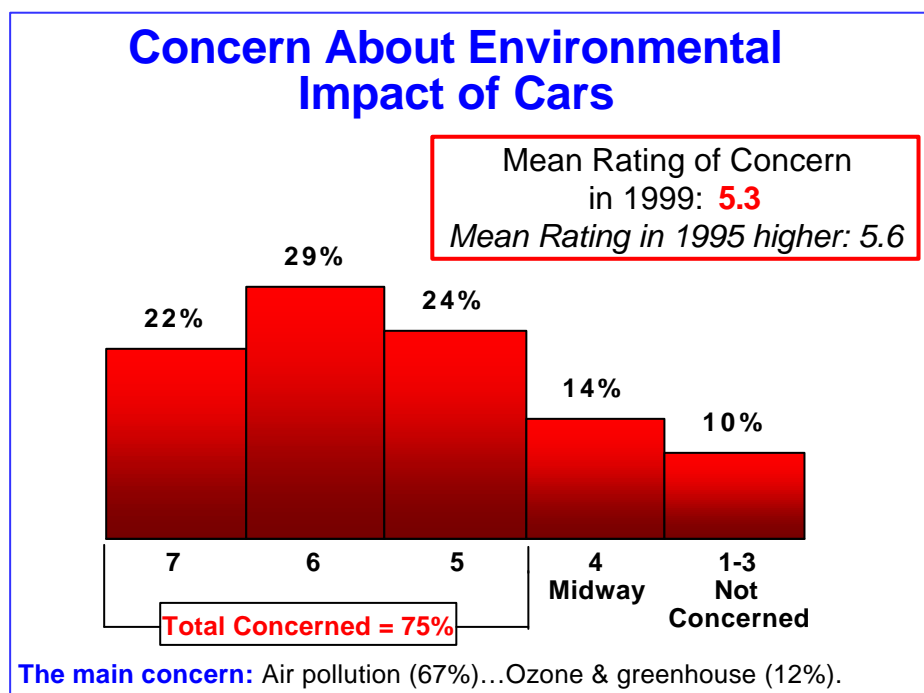
## 2.7 Environmental Concerns

[Refer to Summary Table 9]

While a majority of motorists are concerned about the effect of the car on the environment (75%), it is not a top-of-mind issue and does not rate as strongly as other issues (only 22% are "extremely concerned", compared to 41% for petrol prices). Of particular note is the finding that concern about this issue has slipped since 1995 (mean rating in 1999 is 5.3, compared to 5.6 in 1995).

Not surprisingly, as found in 1995, urban motorists are more concerned about the environmental impact of their cars than those in regional areas (mean rating of 5.4 in urban areas, 5.0 in regional areas).

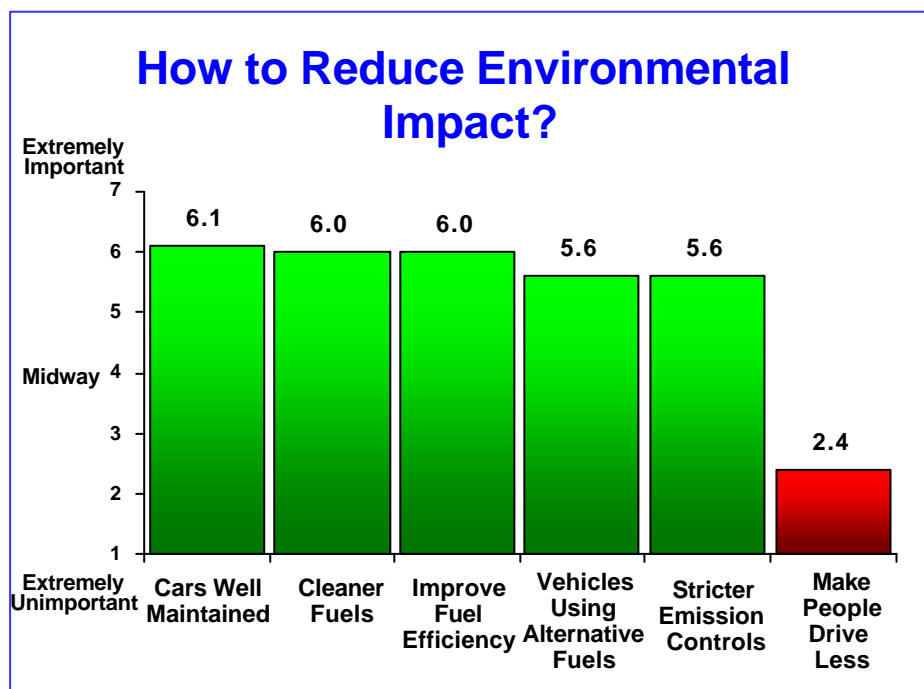
The main environmental concern about cars continues to be air pollution (67%), while ozone layer problems or greenhouse gases are mentioned by a minority only (12%).



As found in previous studies, motorists believe that the best ways to reduce the environmental impact of cars is to have cleaner fuel and emissions: that is, make cars more environmentally friendly rather than ask motorists to modify their car usage. When asked about six possible measures, top of the list in terms of perceived importance are: drivers keeping cars well maintained and in good condition (mean rating of 6.1 out of 7); petrol companies introducing cleaner and less polluting fuels (mean rating 6.0); and car manufacturers improving the fuel efficiency of cars (mean rating 6.0).

While still seen as important, there is marginally less enthusiasm about governments encouraging the introduction of vehicles using alternative fuels (mean rating 5.6); and introducing stricter exhaust and emission controls (mean rating 5.6).

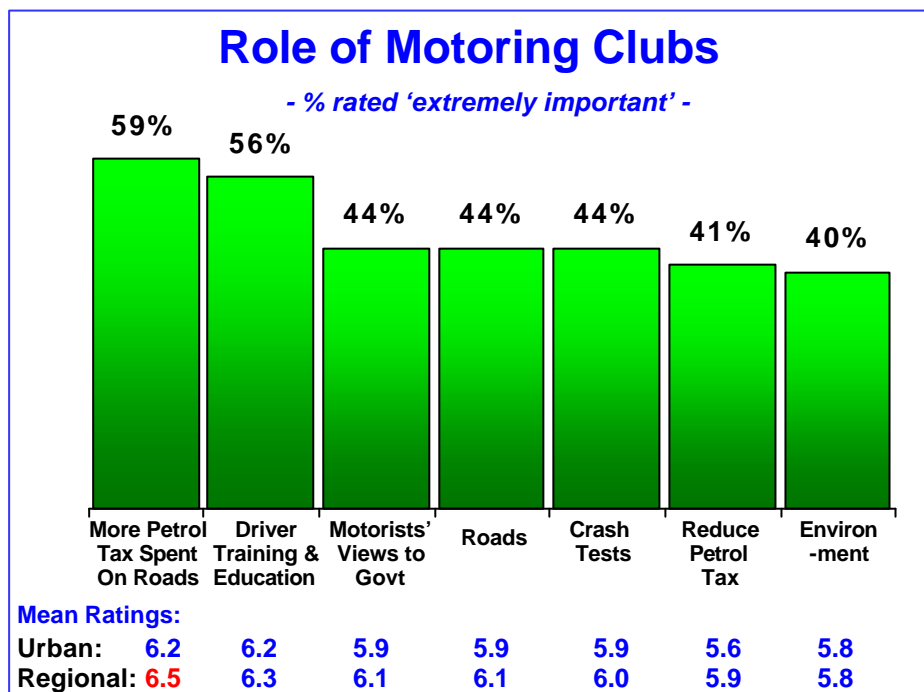
However, the clear majority **reject** the idea of governments increasing the price of petrol to make people drive less (mean rating of importance only 2.4). This again reflects motorists' sensitivity to petrol prices and the strong disinclination to reduce their car usage.



## 2.8 Role of Motoring Organisations

[Refer to Summary Table 10]

As in previous studies, the 1999 survey assessed the perceived importance of motoring organisations being involved in issues beyond the traditional roadside service. The results clearly show that motorists place high levels of importance on the role of motoring clubs on a wide range of issues.



However the two priority issues identified by this study for motoring clubs are:

- petrol pricing and tax issues, especially getting government to spend more of petrol tax revenue on roads (mean rating of 6.3 out of 7); and
- driver behaviour - and a popular call is for more driver education and training (mean rating 6.3).

The petrol pricing and fuel tax issues are strong potential "hot buttons", particularly among regional motorists. They are irked by the country-city petrol price difference and are concerned about the condition of roads in their local area. And, in a climate of rising petrol prices, these issues will become more potent.

**Other** drivers' behaviour is of greater concern to urban motorists, related to their frustration with traffic congestion. The survey results suggest that a priority for motoring clubs is to promote what they already do in the area of driver training, and develop what they do even further.

Importantly, there is a clear desire by motorists for motoring clubs to act on their behalf on these issues, especially regional motorists who often feel neglected and without a voice.

## 2.9 Summary Tables

The results of the 1999 ANOP national survey of motorists are encapsulated in the following ten tables:

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## 1. THE IMPORTANCE OF THE CAR

<b>Degree of Personal Importance Attached to the Car</b>				
<i>Motorists were asked to rate the importance of the car to them in their day-to-day lives, on a scale of 1-7 where '7' means extremely important, '1' means extremely unimportant, and '4' is midway.</i>				
		<b>TOTAL</b>	<b>Urban</b>	<b>Regional</b>
		%	%	%
<b>Rating scale:</b>				
7	Extremely important	52	50	59
6	Very important	23	24	22
5	Fairly important	16	17	13
4	Midway	7	7	4
1-3	Unimportant	2	2	2
Total important		91	91	94
Mean rating		6.2	6.1	6.3

### Comparison Over Time

In 1995, the mean rating of personal importance attached by motorists to their cars was also 6.2

### Why The Car is Important - The 91%

*Those (91%) who rate the car as important to them were asked, in an open-ended question, for their reasons.*

	<b>TOTAL</b>	<b>Urban</b>	<b>Regional</b>
	%	%	%
<b>Those rating the car as important to them</b>	<b>91</b>	<b>91</b>	<b>94</b>
	▽	▽	▽
The 4 main reasons:			
1. <b>For work, commuting.</b> To travel to & from work	45	46	40
2. <b>Essential.</b> Can't get around without it. Isolated	23	18	37
3. <b>Problems with public transport.</b> Inadequate	23	23	24
4. <b>Family, domestic transport.</b> Kids. Shopping	23	22	23

Others: . Convenient, handy (12%) . Leisure, recreation (7%) . Freedom, independence (6%)

- Main responses to open-ended question -

## 2. MOBILITY

<b>Reported Car and Public Transport Usage</b>			
<i>Motorists were asked how often they drive and catch public transport.</i>			
<b>How often drive:</b>	<b>TOTAL</b>	<b>Urban</b>	<b>Regional</b>
	%	%	%
Every day	63	63	63
Most days	28	29	25
Less often	9	8	12
<b>How often catch public transport:</b>	%	%	%
At least once a week	11	14	3
Less often	18	22	7
Total use public transport	29	36	10

<b>Likelihood of Using Public Transport More and Driving Less</b>			
<i>Motorists were asked how likely or unlikely they are to start using public transport more and driving less. * Indicates less than ½%</i>			
<b>Use public transport more:</b>	<b>TOTAL</b>	<b>Urban</b>	<b>Regional</b>
	%	%	%
Very likely	2	2	1
Quite likely	5	7	*
Not very likely	23	28	9
Not likely at all	69	61	89
Unsure	1	2	1
Very & quite likely	7	9	1

<b>Comparisons Over Time</b>				
	<b>1995</b>	<b>1997</b>	<b>1999</b>	<b>Key Changes</b>
	%	%	%	
• Drive every or most days	83	87	91	<i>Up 4%</i>
• Catch public transport at least once a week	16	11	11	<i>Stable</i>
• Very or quite likely to use public transport more & drive less	9	9	7	<i>Down 2%</i>

### 3. MOTORISTS' AGENDA

#### Spontaneously Perceived Most Important Issues Personally Affecting Car Drivers

*Motorists were asked to nominate, in an open-ended question, the most important issues or problems personally affecting them as a car driver. %s overadd as some mentioned more than one issue.*

	TOTAL %	Urban %	Regional %
<b>THE TOP 2 ISSUES:</b>			
1. <b>Motoring costs.</b> Price of petrol, fuel (25%). Car running costs (8%). Cost of rego & insurance (7%). Cost of buying a car (1%). Expensive generally (1%)	32	33	32
2. <b>Other drivers' behaviour.</b> Way other people drive (11%). Reckless, aggressive, road rage (8%). Poor attitudes - irresponsible, impatient (6%). Lack of skills, training (5%). 'Stereotypes' - young, old, women (4%)	32	34	26
<b>FOLLOWED BY:</b>			
3. <b>Condition of roads.</b> Poor condition. Inadequate. Roadworks. Narrow, dangerous	19	17	24
4. <b>Safety. Road accidents.</b> Road safety. Speeding. Unsafe cars. Drink driving	14	14	15
5. <b>Traffic congestion.</b> Traffic jams, delays. Amount of traffic	14	18	2
<i>- Main responses to open-ended question -</i>			

The single most frequently mentioned issue is the **price of petrol** (25%) - and this is spontaneously raised by motorists in both urban (24%) and regional areas (26%)

## 4. PETROL PRICES

### Perceived Level of Personal Knowledge of the Price of Petrol

*Motorists were asked which of 4 statements best describes how much they know about petrol prices.*

Statement best describing knowledge:	TOTAL %	Urban %	Regional %
• I keep a close eye on petrol prices and know exactly what the price of petrol is	40	40	39
• I have a fairly good idea of the price of petrol	39	40	38
• I have only a rough idea of the price of petrol	13	13	12
• I don't pay much attention to the price of petrol	8	7	11

### Who Pays for Petrol?

	TOTAL %	Urban %	Regional %
Pay for own petrol	93	93	93
Company or someone else pays	7	7	7

### Whether Used Supermarket Dockets to Obtain Discounted Petrol

	TOTAL %	Urban %	Regional %
Yes	25	23	31
No	75	77	69

#### 4. PETROL PRICES (Cont.)

##### Level of Concern about Petrol Pricing Issues

*Motorists were asked to rate their level of concern about various petrol pricing issues on a scale of 1 to 7 where '7' means extremely concerned, '1' means not concerned at all and '4' is midway.*

	┌ Concerned ┐				Midway	Not Concerned	Total Concerned
	7	6	5	4			
<b>Rating scale:</b>	%	%	%	%	1-3	5-7	
• Current price of petrol	41	24	15	11	8	80	
• Variations in petrol prices	38	23	15	11	12	76	
• Tax collected from petrol	38	18	16	12	12	72	
• City & country price difference	37	20	16	11	13	73	

##### Mean Ratings of Concern about Petrol Pricing Issues

<b>Mean ratings:</b>	TOTAL	Urban	Regional
• Current price of petrol	5.7	5.7	5.9
• Variations in petrol prices	5.6	5.6	5.4
• Tax collected from petrol	5.5	5.4	5.6
• City & country price difference	5.5*	5.2	6.2

\* **Comparison over time:** In 1995, the mean rating of concern about high petrol prices in the country was 5.2.

##### Who Are Particularly Concerned About Petrol Pricing Issues

- Those who keep a close eye on petrol prices - more likely to be older, lower income groups and those outside the workforce.
- Those residing in regional areas.
- Petrol price variations, however, are of particular concern to those residing in other urban areas.

## 5. PETROL TAX

<b>Perceived Amount of Federal Government Petrol Tax</b>			
<i>Motorists were asked to nominate how many cents from each litre of petrol goes to the Federal Government.</i>			
	TOTAL %	Urban %	Regional %
Underestimate (less than 30c)	38	39	36
Close to correct (30-39c)	20	19	21
Overestimate (40c or more)	24	23	25
Unsure	18	19	18
• % correct (35c)	6	6	6
• <b>Mean guesstimate</b>	<b>28c</b>	<b>28c</b>	<b>29c</b>

<b>Perceived Amount of State Government Petrol Tax</b>			
<i>Motorists were asked to nominate how many cents from each litre of petrol goes to the State Government.</i>			
	TOTAL %	Urban %	Regional %
Close to correct (0-9c)	22	23	21
Overestimate (10c or more)	51	52	50
Unsure	27	25	29
• % correct (8% said 0c in Qld: 5% said 6-8c in other States)	5	5	5
• <b>Mean guesstimate</b>	<b>14c</b>	<b>13c</b>	<b>14c</b>

<b>Perceived Amount of Federal Government Petrol Tax Spent on Roads</b>			
<i>Motorists were informed that the Federal Government receives 35 cents in tax from each litre of petrol - and were asked how many cents, out of the 35 cents, is spent on roads. * Indicates less than ½%</i>			
	TOTAL %	Urban %	Regional %
Underestimate (0-4c)	10	10	10
Close to correct (5-9c)	23	24	21
Overestimate (10c or more)	58	58	57
Unsure	9	8	12
• % correct (6c)	1	*	2
• <b>Mean guesstimate</b>	<b>12c</b>	<b>12c</b>	<b>12c</b>

## 5. PETROL TAX (Cont.)

### Perceived Adequacy of Amount of Federal Govt Petrol Tax Spent on Roads (When Informed)

*Motorists were informed that 6 cents out of the 35 cents is spent on roads - and asked whether this is about the right amount, or should be higher or lower.*

	TOTAL %	Urban %	Regional %
Should be higher	92	91	96
About right	5	6	2
Should be lower	1	1	-
Don't know enough. Unsure	2	1	1

### Comparison Over Time

In 1995, 85% believed the amount of the Federal Government petrol tax spent on roads should be higher.

### Degree of Concern About Amount of Federal Govt Petrol Tax Spent on Roads - Among the 92%

*Those (92%) saying the amount spent on roads "should be higher" were asked to rate their level of concern about this on the '1' to '7' scale where '7' means extremely concerned and '1' means not concerned at all.*

	TOTAL %	Urban %	Regional %
<b>"Should be higher"</b>	<b>92</b>	<b>91</b>	<b>96</b>
Rating scale:	▽	▽	▽
7 ]	41	39	47
6 ] Concerned	23	23	24
5 ]	18	18	16
4 Midway	6	6	5
1-3 Not concerned	4	5	4
Total concerned	82	80	87
Mean rating	6.0	5.9	6.1

## 6. DRIVER BEHAVIOUR

### Perceptions of How Well or Badly Various People Drive

*Motorists were asked to rate how well or badly various people drive on a 1 to 7 scale where '7' means excellent, '6' is very good, '5' good, '4' is average, '3' not very good, '2' bad and '1' is terrible. %s do not add to 100% where some are unsure and could not rate. \* Indicates less than ½%.*

	Excellent 7 %	Very Good 6 %	Good 5 %	Average 4 %	Negative 1-3 %	Total Positive 5-7 %
<b>Rating scale:</b>						
• Self as a driver	11	40	39	9	1	90
• Truck drivers	6	23	34	19	17	63
• Drivers over 65 years	*	7	22	32	37	29
• Drivers under 25 years	*	3	23	39	32	26

### Mean Ratings of How Well or Badly Various People Drive

Mean ratings:	TOTAL	Urban	Regional
• Self as a driver	5.5	5.5	5.4
• Truck drivers	4.7	4.6	5.0
• Drivers over 65 years	3.8	3.7	4.0
• Drivers under 25 years	3.8	3.8	4.0

### Perceptions of Driver Behaviour by Age

	TOTAL	18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55-64 yrs	65+ yrs
<b>Mean ratings:</b>							
• Self as a driver	5.5	5.3	5.5	5.5	5.6	5.6	5.6
• Drivers over 65 years	3.8	3.4	3.4	3.5	4.0	4.3	<b>4.8</b>
• Drivers under 25 years	3.8	<b>4.2</b>	3.8	3.6	3.9	3.8	4.0

## 7. SAFETY CONCERNS & ISSUES

<b>Degree of Concern About Safety Issues</b>			
<i>Motorists were asked to rate how personally concerned they are about safety issues relating to roads and cars on a scale of 1 to 7, where '7' means extremely concerned, '1' means not concerned at all and '4' is midway.</i>			
Rating scale:	TOTAL %	Urban %	Regional %
7	35	36	35
6	23	25	18
5	19	18	20
4	16	15	19
1-3	6	5	7
Total concerned		79	73
Mean rating		5.7	5.5

### Comparison Over Time

In 1995, the mean rating of personal concern about road and car safety was higher at 6.3.

### Priority Order of Concern About Three Key Safety Aspects - The 77%

*Those (77%) concerned about road and car safety were asked to nominate, from a list of 3, the safety issue they are most concerned about. They were then asked to nominate the one they are next most concerned about. This table shows the issue of most concern and then the combined top 2 issues (most & next most concern).*

	TOTAL %	Urban %	Regional %
<b>Concerned about road &amp; car safety</b>	<b>77</b>	<b>79</b>	<b>73</b>
	▽	▽	▽
<b>Issue of most concern:</b>			
1. How safely people drive	60	63	52
2. How safe the roads are to drive on	9	8	12
3. How safe the cars are	7	7	7
<b>Combined top 2 issues:</b>	%	%	%
1. How safely people drive	73	75	67
2. How safe the roads are to drive on	42	40	45
3. How safe the cars are	37	40	30

## 7. SAFETY CONCERNS & ISSUES (Cont.)

### What Should be Done to Reduce Road Accidents Among Young Drivers

*Motorists were asked, in an open-ended question, to nominate one thing that should be done to reduce road accidents among drivers under the age of 25.*

MAIN SUGGESTIONS:	TOTAL %	Urban %	Regional %
<b>1. Tougher restrictions, penalties &amp; enforcement.</b> Reduce speed limits for under 25s (16%). Restrict cars they can drive (11%). Drink driving restrictions and enforcement (9%). Tougher penalties generally (6%). More enforcement generally (3%). Restrict when can drive (1%)	41	40	43
<b>2. More driver education &amp; training.</b> More driver training - defensive driving, compulsory courses (28%). Teach driving in schools (2%)	30	31	28
<b>3. Review of licensing procedures.</b> Longer on L plates (7%). Review license testing (6%). Longer on P plates (4%). Increase minimum age for license (4%). Periodic re-testing of drivers (2%)	21	21	23

Others: . Campaigns to raise driver safety awareness (7%) . Young drivers should improve their attitudes (5%) . General safety measures, not just for the young (2%).

*- Main responses to an open-ended question -*

### How to Reduce Road Accidents - By Age

MAIN SUGGESTIONS:	TOTAL %	18- 24 yrs %	25- 34 yrs %	35- 44 yrs %	45- 54 yrs %	55+ yrs %
<b>1. Tougher restrictions, penalties &amp; enforcement</b>	41	35	38	42	43	44
<b>2. More driver education &amp; training</b>	30	23	31	32	36	27
<b>3. Review of licensing procedures</b>	21	19	24	22	18	23

## 8. ROADS

### Perceived Condition of Highways, Major Arterial Roads & Local Roads

*Motorists were asked to rate the current condition of various roads on a 1 to 7 scale where '7' means excellent, '6' very good, '5' good, '4' average, '3' not very good, '2' bad and '1' means terrible. %s add to less than 100% where a tiny minority were unsure.*

	Excellent 7 %	Very Good 6 %	Good 5 %	Average 4 %	Negative 1-3 %	Total Positive 5-7 %
<ul style="list-style-type: none"> <li>• <b>Major highways.</b> Major highways <i>between</i> cities &amp; towns, and <u>not</u> within cities</li> </ul>	7	27	35	18	10	69
<ul style="list-style-type: none"> <li>• <b>Major arterial roads.</b> Major roads <i>within</i> cities &amp; towns</li> </ul>	5	20	34	25	13	59
<ul style="list-style-type: none"> <li>• <b>Roads in your local area</b></li> </ul>	5	18	24	26	27	47

### Mean Ratings of the Perceived Condition of Roads

	TOTAL %	Urban %	Regional %
• Major highways	5.0	5.0	5.0
• Major arterial roads	4.7	4.7	4.7
• Roads in local area	4.3	4.4	3.9

### Mean Ratings of Condition of Roads - By State

	TOTAL Mean	NSW/ ACT Mean	VIC Mean	QLD Mean	SA Mean	WA Mean	TAS Mean	NT Mean
• Major highways	5.0	5.0	5.2	<b>4.6</b>	5.0	5.0	5.2	<b>5.6</b>
• Major arterial roads	4.7	<b>4.4</b>	<b>5.1</b>	4.7	4.8	4.9	4.8	<b>5.4</b>
• Local roads	4.3	<b>3.9</b>	4.5	4.3	4.5	<b>4.8</b>	4.1	<b>5.2</b>

## 8. ROADS (Cont.)

<b>Support for Tollways</b>		
<i>Motorists were asked whether or not they are in favour of paying a <b>toll on a new major road or highway</b> to help pay for it. They were then asked about the idea of introducing a <b>toll on an existing major road</b> to help pay for maintaining and upgrading it.</i>		
	<b>Building New Tollways %</b>	<b>Introducing Tolls on Existing Roads %</b>
In Favour - Strongly	18	5
In Favour - Slightly	27	13
Not in Favour - Slightly	12	15
Not in Favour - Strongly	40	66
Unsure	3	1
Total in Favour	45	18
Total Not in Favour	52	81

### Comparison Over Time

Support for building new tollways has declined since 1995 when 51% were in favour and 46% were not in favour.

### Support for Tollways - By State

	TOTAL %	NSW/ ACT %	VIC %	QLD %	SA %	WA %	TAS %	NT %
<b>Building New Tollways</b>								
Total in Favour	45	<b>55</b>	39	<b>49</b>	31	28	38	36
Total Not in Favour	52	41	<b>59</b>	48	<b>67</b>	<b>70</b>	<b>60</b>	<b>60</b>
<b>Introducing Tolls on Existing Roads</b>								
Total in Favour	18	21	12	19	17	18	21	18
Total Not in Favour	81	77	<b>87</b>	80	82	81	75	81

There are no marked differences between urban and regional areas

## 9. ENVIRONMENTAL CONCERNS

<b>Degree of Personal Concern About Effect of Motor Vehicles on the Environment</b>			
<i>Motorists were asked to rate their level of concern about the effect of motor vehicles on the environment on a 1 to 7 scale, where '7' means extremely concerned and '1' means <u>not</u> concerned at all.</i>			
<b>Rating scale:</b>	<b>TOTAL</b>	<b>Urban</b>	<b>Regional</b>
	%	%	%
7	22	23	18
6	29	26	21
5	24	29	29
4	14	14	17
1-3	10	8	14
Total concerned		78	68
Mean rating		5.4	5.0

### Comparison Over Time

In 1995, the mean rating of personal concern about the effect of motor vehicles on the environment was higher at 5.6.

### Main Concerns About Effect of Motor Vehicles on the Environment

*Those (75%) who are concerned about the effect of motor vehicles on the environment were asked what their main concerns are, in an open-ended question.*

<b>Those concerned about effect of motor vehicles on the environment</b>	<b>TOTAL</b>	<b>Urban</b>	<b>Regional</b>
	%	%	%
	<b>75</b>	<b>78</b>	<b>68</b>
The main concern:	▽	▽	▽
1. <b>Air pollution.</b> Air quality (30%). Vehicle emissions (28%). Pollution generally (20%). Health concerns due to air pollution (8%). Noxious gases (6%). Pollution caused by older, badly maintained cars (5%). Leaded petrol (4%). Smog (4%). Pollution worse in cities (3%)	67	70	61
Then:			
2. <b>Ozone. Greenhouse.</b> Effect on ozone layer (8%). Greenhouse gases (5%)	12	12	11

- Main responses to open-ended question -

## 9. ENVIRONMENTAL CONCERNS (Cont.)

### Perceived Importance of Measures to Reduce the Effect of Cars on the Environment

*Motorists were asked to rate the importance of six ways of helping to reduce the effect of the cars on the environment on a 1 to 7 scale, where '7' means extremely important, '6' is very important, '5' fairly important, '4' is midway, '3' is fairly unimportant, '2' very unimportant and '1' is extremely unimportant.*

Measures to reduce effect of cars on environment:	Important			Mid-way 4 %	Unimp- ortant 1-3 %	Total Important 5-7 %
	7 %	6 %	5 %			
1. Drivers to keep cars well maintained	48	30	14	5	3	92
2. Petrol companies to introduce cleaner fuels	45	28	17	5	4	90
3. Car manufacturers to improve fuel efficiency of cars	46	26	17	6	4	89
4. Govts to encourage vehicles using alternative fuels	36	22	22	10	8	80
5. Govts to introduce stricter emission controls	31	27	22	10	9	80
6. Govts to increase petrol prices to make people drive less	3	1	8	12	75	12

### Mean Ratings of Measures to Reduce the Effect of Cars on the Environment

Mean ratings:	TOTAL Mean	Urban Mean	Regional Mean
1. Drivers to keep cars well maintained	6.1	6.1	6.1
2. Petrol companies to introduce cleaner fuels	6.0	6.1	6.0
3. Car manufacturers to improve fuel efficiency of cars	6.0	6.0	6.0
4. Govts to encourage vehicles using alternative fuels	5.6	5.7	5.5
5. Govts to introduce stricter emission controls	5.6	5.6	5.4
6. Govts to increase petrol prices to make people drive less	2.4	2.4	2.1

## 10. MOTORING CLUBS

### Role for Motoring Clubs

*Motorists were asked to rate the importance of motoring organisations being involved in seven issues, on the 1 to 7 scale where '7' means extremely important, '1' extremely unimportant, and '4' midway. The issues are shown in order of importance.*

	Important			Mid-way 4 %	Unimp- ortant 1-3 %	Total Important 5-7 %
	7 %	6 %	5 %			
1. Getting government to spend more of petrol tax on roads	59*	24	10	4	3	93
2. Improving driver training and education	56	24	12	5	2	92
3. Obtaining motorists' views and putting them to government	44	27	18	7	3	89
4. Working out better ways to plan and pay for roads	44	27	17	7	4	88
5. Running special car safety and crash tests	44	24	18	8	5	86
6. Finding ways to reduce effect of cars on environment	40	25	19	9	6	84
7. Getting government to reduce tax on petrol	41	23	17	10	9	81

\* [67% in regional areas]

### Mean Ratings for Motoring Clubs' Roles

Mean ratings:	TOTAL Mean	Urban Mean	Regional Mean
1. Getting govt to spend more of petrol tax on roads	6.3	6.2	6.5
2. Improving driver training and education	6.3	6.2	6.3
3. Obtaining motorists' views & putting them to govt	6.0	5.9	6.1
4. Working out better ways to plan & pay for roads	6.0	5.9	6.1
5. Running special car safety and crash tests	5.9	5.9	6.0
6. Finding ways to reduce effect of cars on environ.	5.8	5.8	5.8
7. Getting government to reduce tax on petrol	5.7	5.6	5.9

### Comparisons Over Time

	1995 Mean	1996 Mean	1997 Mean	1999 Mean
• Obtaining motorists' views & putting them to govt	5.8	Not Asked	6.0	6.0
• Running special car safety & crash tests	5.7	6.0	6.2	5.9