

Australian Automobile Association  
(AAA)

THE MOTORISTS' VIEW IN 2000

**Report on October 2000  
ANOP National Survey**

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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 October 2000.

This is the fifth annual national survey of motorists' views undertaken by ANOP for the AAA. This year, the main focus of the research program has been on petrol pricing.

### **1.1 Background and Objectives**

The first ANOP national survey of motorists was undertaken on behalf of the AAA in 1995. Following this comprehensive benchmark assessment of Australian motorists' views, ANOP has undertaken further national studies in 1996, 1997, 1999 and now in 2000. These studies have monitored issues covered in the original 1995 benchmark survey but have also covered topical and emerging issues of importance to the AAA and its membership base.

ANOP's October 2000 study for the AAA monitors the agenda of issues and concerns for Australian motorists, and then specifically gauges their attitudes to petrol pricing issues and to roads. As the main focus of the 2000 research has been on petrol pricing, a number of additional questions have been added to explore the issue further. The areas covered included what should be done to reduce petrol prices, and in particular, what the *federal government* should be doing about petrol pricing and taxes; knowledge of petrol tax indexation; and levels of understanding of the rebate on petrol tax in country areas.

The October 2000 study of motorists' views specifically investigated the following main areas:

1. **Motorists' Agenda** - investigating the spontaneously perceived most important issues or problems personally affecting car drivers.
2. **Petrol Prices: Awareness and Behaviour** - assessing motorists' petrol price consciousness, their use of supermarket dockets to obtain discounted petrol, and their awareness of the rebate to reduce the impact of the GST on country petrol prices. Motorists' frequency of car usage was also monitored.
3. **Concern about Petrol Pricing Issues** - gauging motorists' level of concern about the current petrol price, the petrol tax, variations in petrol prices, and the city-country price differential.
4. **Knowledge of Petrol Tax** - investigating motorists' knowledge of the amount of federal government tax on petrol and the amount of petrol tax spent on roads, as well as the perceived adequacy of the amount of petrol tax being spent on roads.
5. **Perceived Priorities in Ways of Reducing Motorists' Spend on Petrol** - assessing the level of support for four ways of reducing the amount that motorists spend on petrol; and identifying whether motorists believe the petrol tax should be reduced or kept as is to fund other areas.
6. **Perceived Priorities for the Federal Government on Petrol Issues** - measuring the perceived importance of various options for the federal government in relation to petrol taxes and prices.
7. **Attitudes to Roads** - analysing motorists' perceptions of the current condition of major highways, major arterial roads and local roads.

## 1.2 Research Methodology

The October 2000 research program consisted of a quantitative national survey with **832** motorists – a re-interview of approximately half of the 1623 motorists interviewed in September 1999. This is the second time (1996 was the first) when ANOP's unique re-interview method was used to track trends. In this case about half the motorists originally interviewed in the 1999 survey were re-interviewed. They were contacted between 7-10 October 2000. In the original survey from which these latest interviewees were drawn, motorists were defined as regular drivers aged 18 years and over, and included members and non-members of motoring organisations.

The re-interview sample was carefully analysed and found to be very close in demography and measured attitudes to the original sample. Thus, even small changes in attitude are significant as the same people are involved.

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. In some cases however, small base sizes make literal interpretation unwise. Importantly, results were weighted at the analysis stage to obtain a properly representative national picture.

### **1.3 This Report**

This report draws together the main findings and conclusions of the October 2000 ANOP national study. It consists of -

1. This Introduction
2. Executive Summary
3. Analysis of the Main Survey Results
4. Tabular Analysis of Geographic Differences and Trends

The findings of the 2000 ANOP study were presented to the AAA Annual Conference in Brisbane on 20 November 2000 in an address entitled "The Motorists' View in 2000."

## 2. EXECUTIVE SUMMARY

The key findings and trends are as follows:

- Petrol prices as an issue for motorists has doubled in one year - from 25% in 1999 to over 50% in 2000. This "hot button" issue has become red hot - especially in regional Australia where the next federal election could well be won or lost.
- Motorists' key concerns - petrol prices and taxes - have increased significantly in importance... the other petrol issues (daily fluctuations, city-country differentials) are still important but not increasing in intensity.
- While the survey has shown significant attitude shifts, of greater importance perhaps is evidence of actual behaviour change:
  - \* Knowledge of exactly how much petrol costs is up significantly.
  - \* The steadily increasing trend to driving more has halted for the first time in ANOP's measurement for the AAA and is back to 1997 levels.
  - \* There is a significantly greater use of supermarket dockets to buy discounted petrol.
- Motorists now overestimate how much the federal government takes in petrol tax on a litre of petrol (up from an estimated 28¢ in 1999 to 41¢ in 2000).
- While motorists do not believe that much can be done to redress overseas oil prices, they strongly believe that something can be done in Australia... and that is doing something about petrol tax. The main priorities are a reduction or freezing of the fuel excise.

- Motorists do not accept the argument that the petrol tax needs to be kept as it is to fund other areas: only one in five agrees with this argument. Instead almost seven in ten - 68% - want the federal government to reduce the tax to make petrol cheaper.
- In regional Australia, there is low awareness of the GST rebate in country areas, and among those aware, only 6% believe that local service stations are passing the rebate on.
- There have been slight improvements in the perceived condition of major highways, arterials and local roads in urban areas. In regional Australia, perceptions of all categories of roads are at similar levels to 1999.
- Roads are of greater concern to regional motorists, and this is reflected in the lower ratings they give to roads in their local area, compared to urban dwellers. Extra road funding in regional Australia will be welcomed, but the condition of roads is about half the size of petrol prices as an issue in regional Australia.

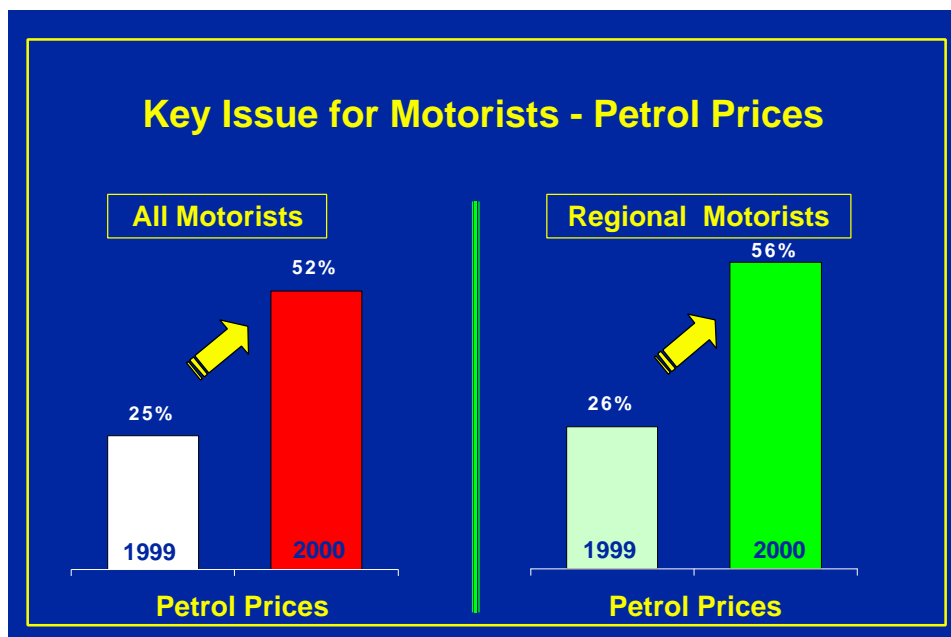
### 3. ANALYSIS OF MAIN SURVEY RESULTS

This section analyses the main results of the October 2000 ANOP national study. Key charts are included as appropriate in the text. A set of seven tables summarising the main survey results and trends concludes the section.

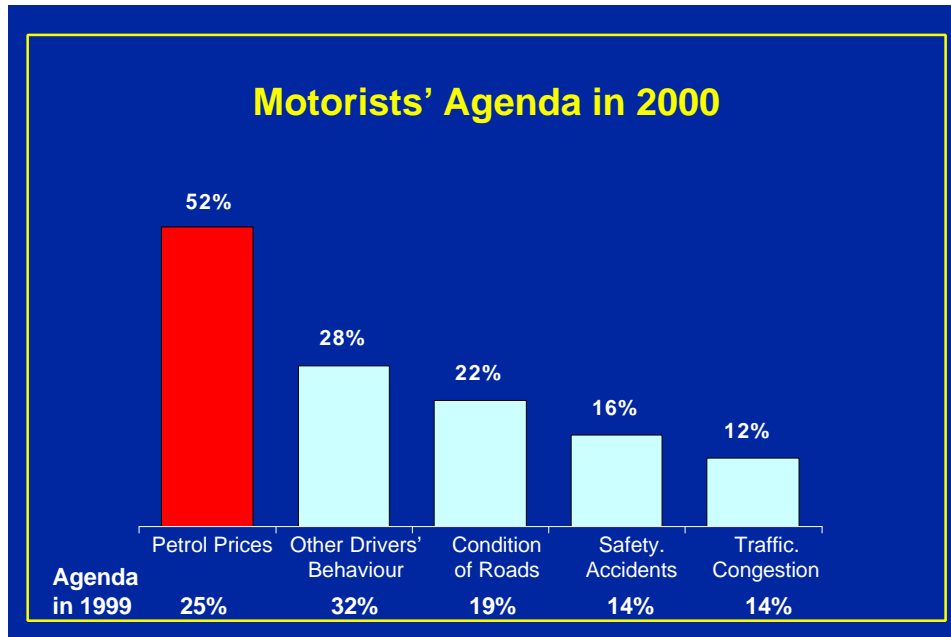
#### 3.1 Motorists' Agenda

*[Refer to Summary Table 1]*

The number one issue at the top of motorists' spontaneous issues or problems for them as car drivers, is **petrol prices**. This has risen from one-quarter (25%) spontaneously mentioning petrol prices in September 1999 to one-half (52%) in the October 2000 survey. This very significant rise in importance as an issue is also reflected in the opinion of regional motorists (56%, up from 26% in 1999). This doubling in significance is an extremely large shift - one found rarely in opinion surveys of this kind.



Importantly, petrol prices has simply grown in strength as an issue and become more widespread rather than pushing other issues off the motorists' agenda.



In summary, the main spontaneous issues or problems concerning motorists in 2000 are:

- **Motoring costs:** The most significant single concern in this basket of issues is clearly **petrol prices** (52%, out of the 54% mentioning a motoring cost) - the increased emphasis on motoring costs (54%, up from 32% in 1999) has been driven entirely by this heightened concern about petrol prices.
- **Other drivers' behaviour:** Three in ten (28%, down slightly from 32%) say they are bothered by the way *other* people drive. As in 1999, reckless, aggressive and impatient drivers particularly concern those who mention this issue.
- **Condition of roads:** Opinion on this issue has remained relatively steady, with one in five (22%, up slightly from 19%) nominating roads as a priority issue. In regional areas, concern about roads has increased, with one-third (34%) mentioning roads – up from one-quarter (24%) in 1999.

Next on motorists' agenda of issues are:

- **Safety. Road accidents:** An ongoing concern raised by one in six motorists (16%, up marginally from 14%).
- **Traffic congestion:** Problems with traffic continue to be spontaneously mentioned by over one in ten (12%, down marginally from 14%).

The main differences between regional and urban motorists' agenda continue to be a greater concern in urban areas about other drivers' behaviour and traffic congestion, whereas regional motorists place a higher priority on the condition of roads.

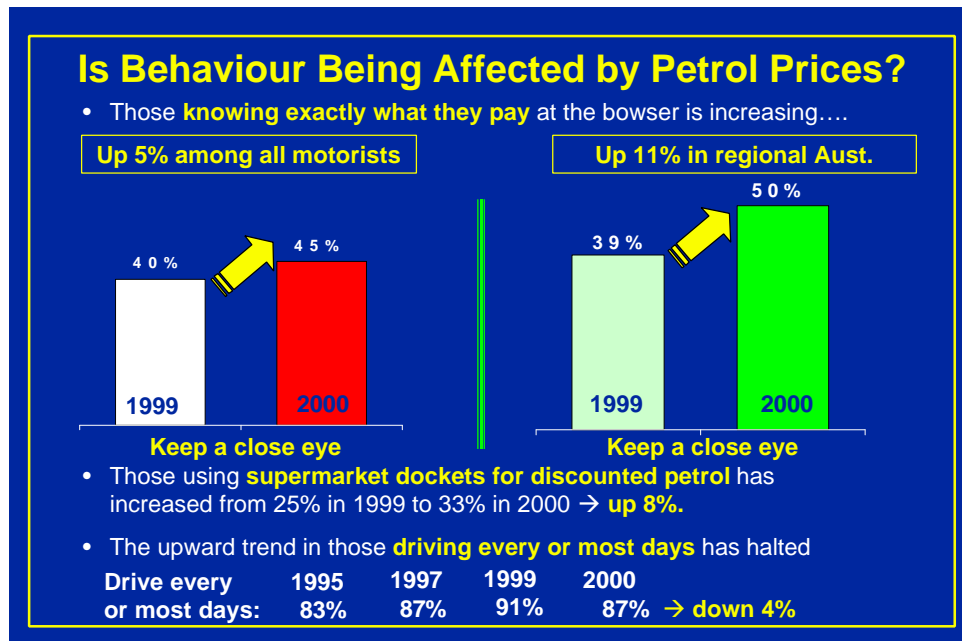
<b>Motorists' Agenda: Regional vs Urban Areas</b>				
	<b>Regional Motorists</b>		<b>Urban Motorists</b>	
<b>THE MAIN ISSUE IN 2000:</b>	<b>1999 %</b>	<b>2000 %</b>	<b>1999 %</b>	<b>2000 %</b>
1. Motoring costs, petrol prices	32	<b>57</b>	33	<b>53</b>
<b>FOLLOWED BY:</b>				
2. Condition of roads	24	<b>34</b>	17	17
3. Other drivers' behaviour	26	20	34	<b>31</b>
4. Safety. Road accidents	15	12	14	18
5. Traffic congestion	2	2	18	<b>15</b>
<i>- Table ordered on regional motorists' 2000 results -</i>				

As in the 1999 survey, motoring costs and other drivers' behaviour continue to be at the top of the agenda for motorists in urban areas, although motoring costs are now of much greater concern because of petrol prices. In regional areas, the condition of roads now emerges as more important than other drivers' behaviour. However, while the condition of roads is of greater concern for this group of motorists than it was in 1999 (up from 24% to 34% in 2000), petrol prices are now placed much higher on the agenda (up from 26%, to 56% in 2000).

### 3.2 Petrol Prices: Awareness and Behaviour

[Refer to Summary Table 1 & 2]

A significant finding of ANOP's 2000 research is that motorists' increased concern about petrol prices is now reflected in changes in their behaviour. More motorists are keeping a close eye on petrol prices than before, with exactly half of those in regional areas saying they know precisely what the price per litre is (50%, up from 39%).



There has also been a significant (8%) increase in the number using supermarket shopping docketts to obtain discounted petrol - now a practice of one-third (33%) of all motorists. As found in 1999, the use of supermarket shopping docketts continues to be slightly higher among regional motorists (35%, up from 31%).

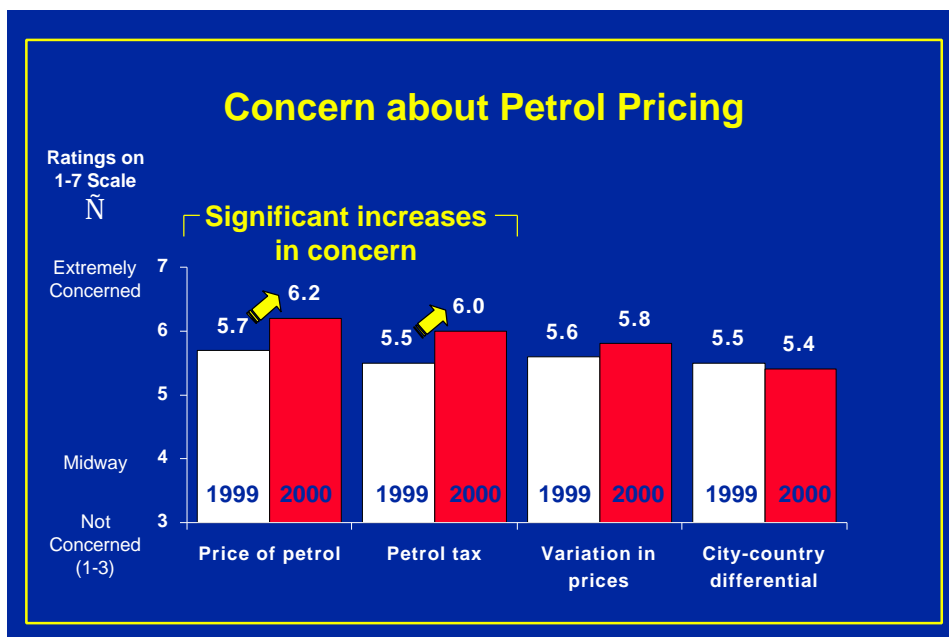
A further indication of changes in motorists' behaviour is the halting of the upward trend in driving frequency for the first time since the survey program began in 1995. The percentage reporting that they drive every or most days had risen steadily from 83% in 1995 to 91% in 1999. Now in 2000, this rate

has dropped to the 1997 level of 87%. (Recently released government figures confirm this trend.) Previous ANOP studies have reported on the vital role the car plays in most Australians' lives, so any decline in car usage is particularly noteworthy.

### 3.3 Concern about Petrol Pricing Issues

*[Refer to Summary Table 3]*

Another key finding of the October 2000 survey is that the significant rise in the level of concern about petrol prices has been accompanied by a similar increase in concern about the fuel excise.



Motorists' level of concern about petrol prices (rated on the 7 point scale) is significantly higher than in 1999 (6.2 on the 7 point scale, up from 5.7). This upward shift has also similarly occurred in the level of concern about the amount of tax collected from petrol (6.0, up from 5.5 in 1999).

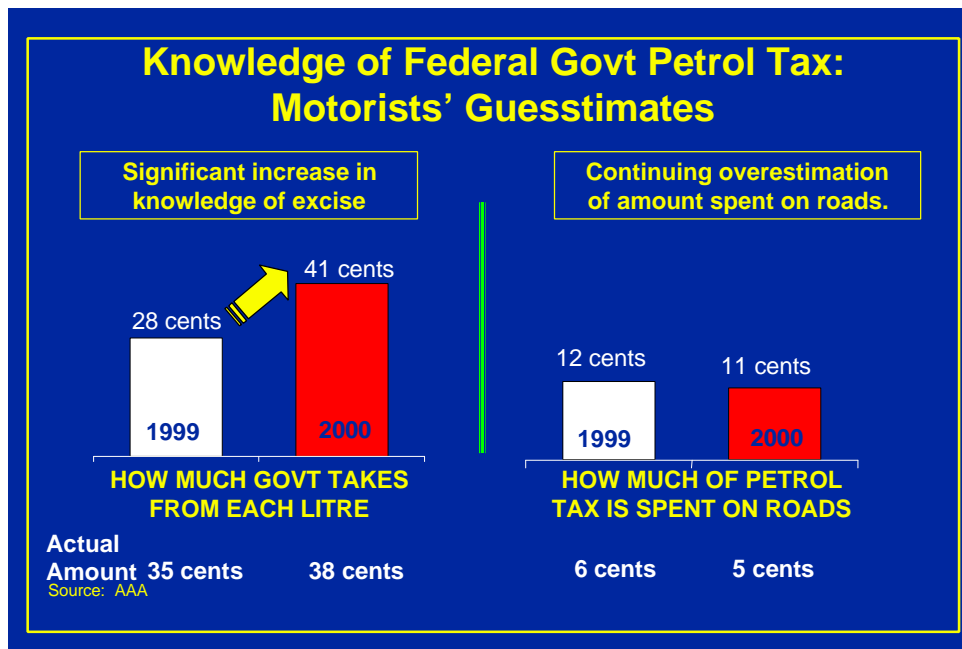
While drivers are now exhibiting increased concern about petrol prices and the fuel excise, the perennial issues of day-to-day fluctuations in price (5.8) and the country-city price differences (5.4) also continue to rate highly. However, these issues have remained relatively steady since ANOP's 1999 survey, indicating that motorists' attention has shifted from the margins to the main game.

### **3.4 Knowledge of Petrol Tax**

*[Refer to Summary Table 4]*

Motorists have a much better idea of the magnitude of the federal government petrol tax than they did a year ago. In September 1999 the level of tax was significantly underestimated - the mean guesstimate of the tax collected from each litre of petrol being 28¢ (at a time when the tax was 35¢ per litre). In the October 2000 survey, motorists' average estimate is that 41¢ per litre goes to the government - now slightly higher than the excise level (of 38¢). Both urban and regional motorists estimate the tax at similar levels.

While knowledge of the size of the excise has increased, the amount going back to roads continues to be overestimated. In 1999, motorists "guessed" 12¢ of the tax collected from each litre of petrol was being spent on roads (when the actual figure was 6¢), and this has slipped marginally down to 11¢ in 2000 (when about 5¢ is being spent).



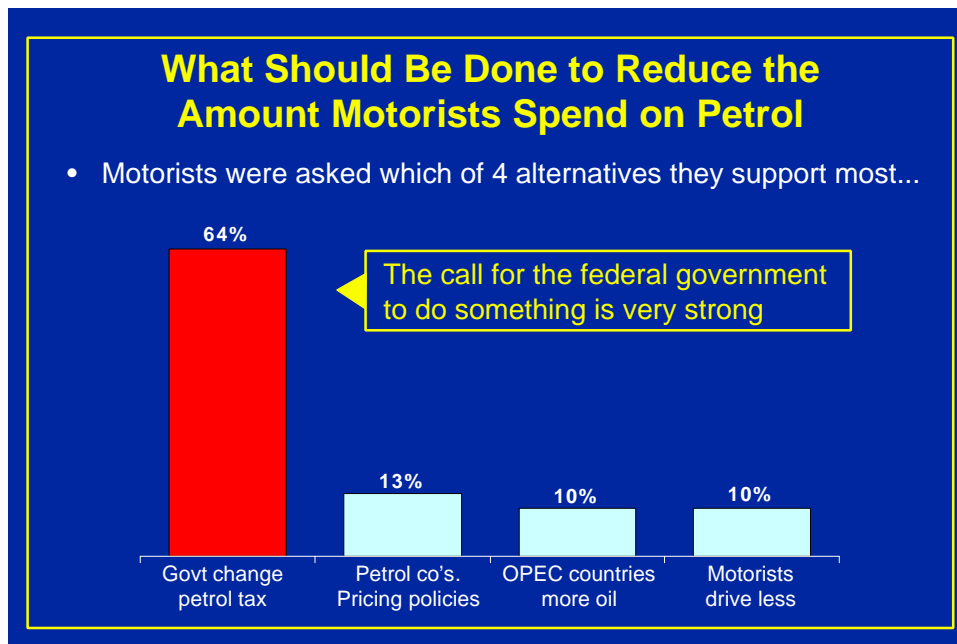
When informed of the actual amount of federal government spending on roads (about 5¢ out of every 38¢ of tax collected), the great majority of motorists express strong concern, as found in the 1999 survey. However, while the level of concern about petrol prices and the fuel excise has risen significantly between 1999 and 2000, the level of concern about the amount of the excise going back to roads has remained relatively stable.

### 3.5 What Should be Done to Reduce Petrol Costs for Motorists

*[Refer to Summary Table 5]*

In a new question in the October 2000 survey, motorists were asked which of four alternatives they support most as ways of reducing the amount motorists spend on petrol. The four alternatives were that **oil producing countries** could produce more oil; **motorists** could drive less; **petrol companies** could change their pricing policies; or the **federal government** could change the tax on petrol.

Motorists' call for government action is clearly evident. Nearly two-thirds (64%) believe that the most important way (out of the four alternatives) to reduce petrol costs for motorists is for the federal government to change the tax on petrol. Only one-in-ten minorities support each of the three other alternatives - that is, petrol companies to change their pricing policies (13%); OPEC countries to produce more oil (10%); or motorists to drive less (10%).



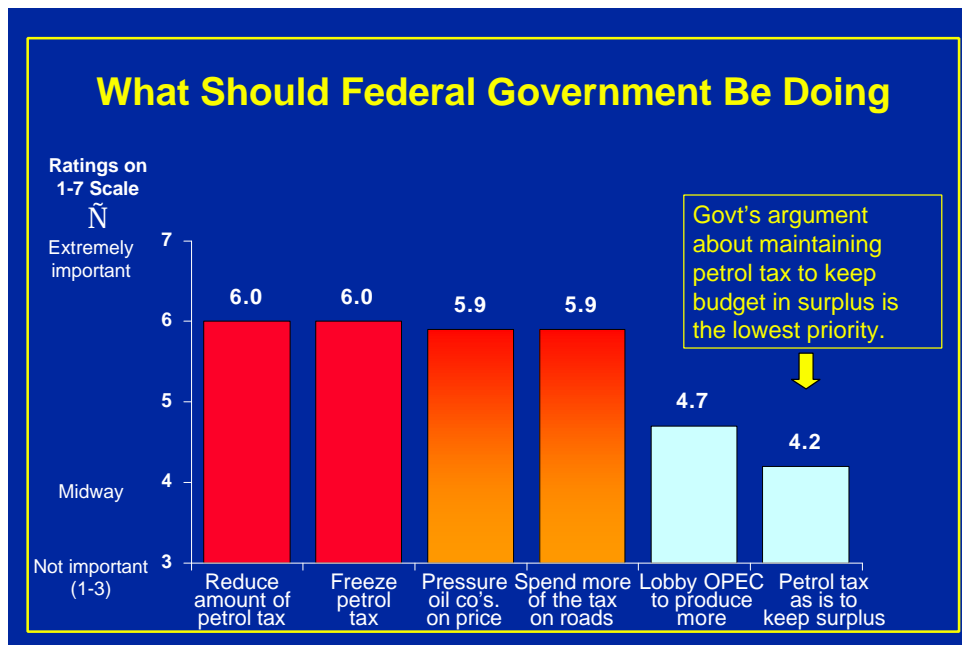
Regional and urban motorists' views are very similar in terms of identifying who should be doing something about petrol prices, with the clear majority (64% of regional and urban motorists) calling for a change in the federal petrol tax.

### 3.6 Perceived Priorities for Federal Government on Petrol Issues

*[Refer to Summary Table 6]*

In another new question in October 2000, motorists were asked to rate the importance of six options for the federal government in relation to petrol taxes and prices. Motorists' top two priorities for the federal government clearly emerge as being to reduce the amount of tax on petrol and to freeze the tax on petrol – both rated 6.0 on a 7 point importance scale.

Also seen as important are putting pressure on oil companies to keep prices down and spending more of the petrol tax on roads (both 5.9). Lobbying oil producing countries is seen as of lower importance (4.7), although this is rated slightly higher among regional motorists (5.1). Maintaining the current petrol tax system to keep the federal budget in surplus emerges as least important - registering as neither important or unimportant on the 7 point scale (4.2, where '4' is midway). These results clearly suggest that motorists are looking towards the domestic front for solutions to ease current high petrol prices.

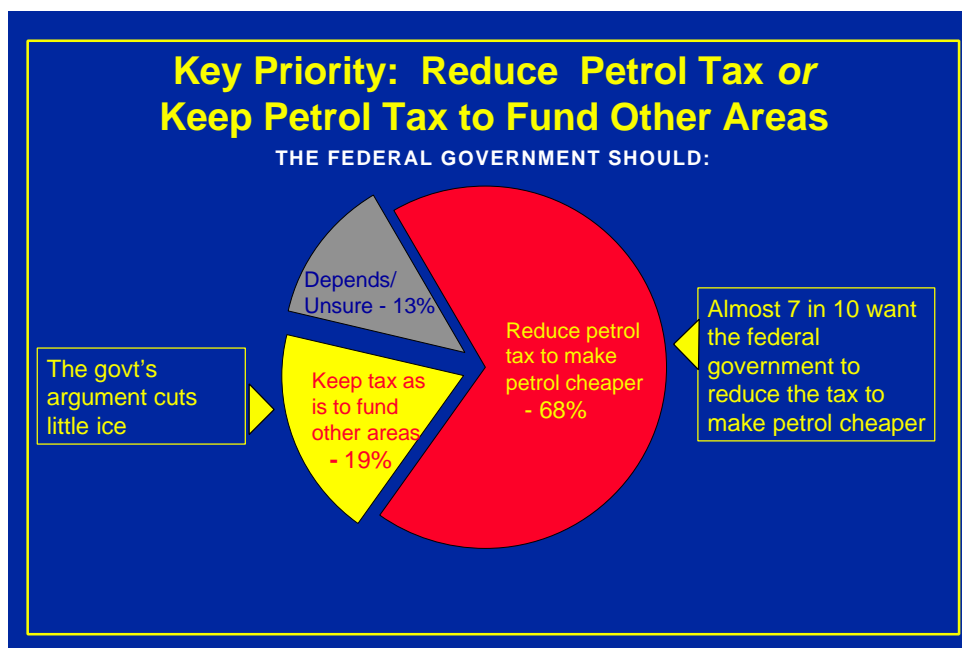


### 3.7 Key Priority: Reduce Petrol Tax or Keep It to Fund Other Areas

*[Refer to Summary Table 5]*

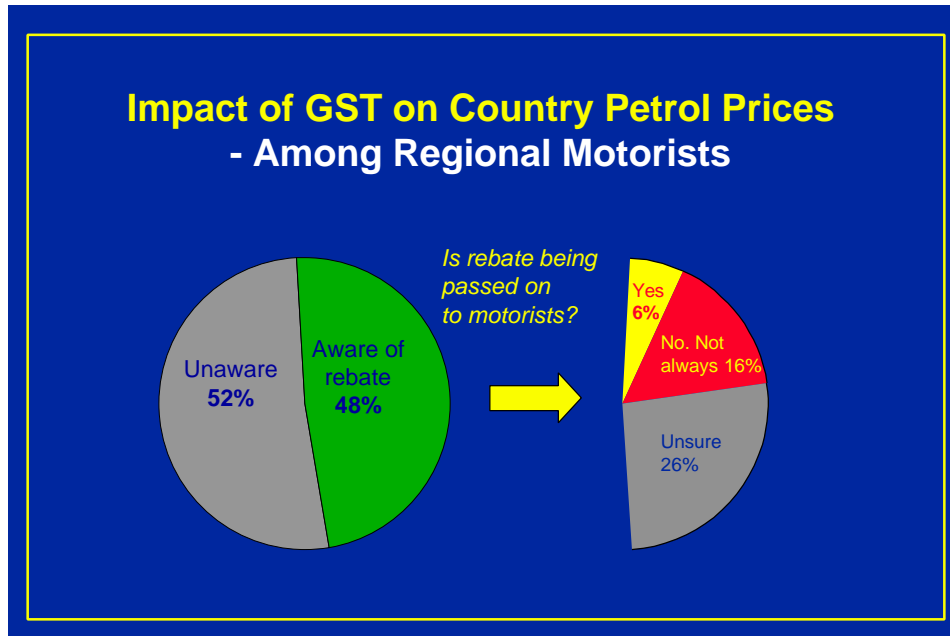
The perceived low importance of maintaining the current petrol tax system to keep the federal budget in surplus is further emphasised when motorists are asked whether they feel the federal government should reduce the petrol tax to make petrol cheaper, or keep the petrol tax as it is to fund other areas.

Only two in ten motorists (19%) support the option of maintaining the petrol tax in order to fund other areas, whereas almost seven in ten (68%) say the government should reduce the tax to make petrol cheaper. These findings again clearly confirm that motorists see the main form of relief from high petrol prices as being some reduction in the fuel excise. Only a small minority is currently convinced of the need to maintain the existing levels of tax on petrol.



### 3.8 Awareness of Rebate to Reduce the Impact of the GST on Country Petrol Prices [Refer to Summary Table 2]

This research also reveals that the majority of motorists in regional areas are not aware of the GST rebate on petrol in the country (52% unaware). More importantly, among those who say they are aware of the rebate, few believe local petrol stations in country areas are passing it on.



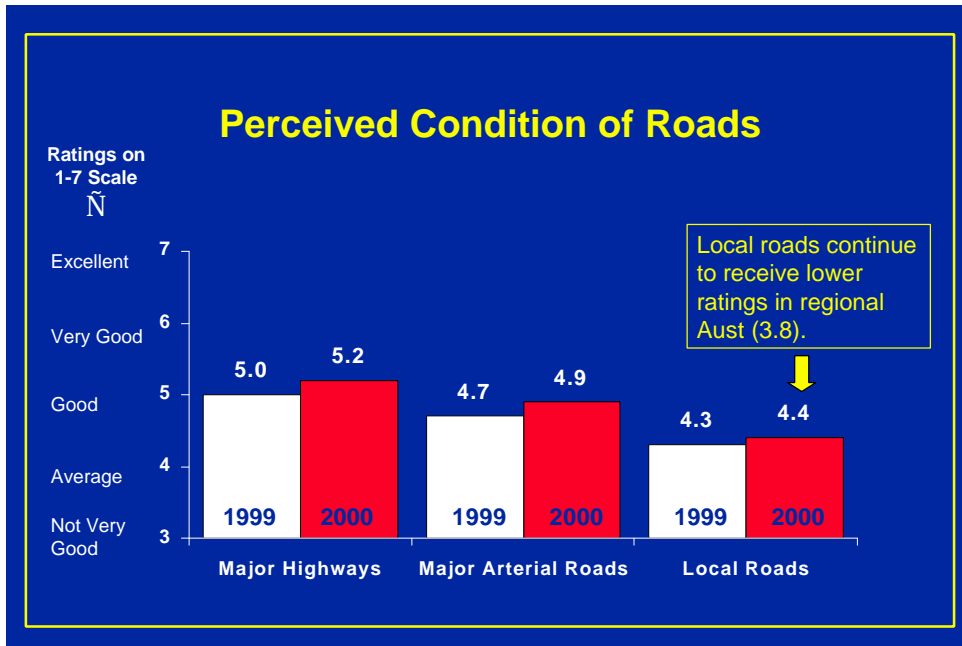
Less than one in ten of regional motorists (6%) believes the local service stations are passing on the rebate to motorists. The remainder thinks it is either not passed on (16%) or just do not know (26%).

### 3.9 Condition of Roads

*[Refer to Summary Table 7]*

Since ANOP's 1999 survey there have been some perceived improvements in the condition of highways and arterials - but this is mainly in the capital cities. Major highways are rated just above the "good" mark of '5' on the 7 point scale, with a 5.2 rating (urban motorists: 5.3, up from 5.0; regional motorists: 5.1, 5.0 in 1999). The condition of major arterials is rated just below the "good" point at 4.9 (urban motorists: 4.9, up from 4.7; those in regional areas: 4.8, 4.7 in 1999).

Local roads continue to receive the lowest ratings (4.4), particularly among regional motorists (3.8). While there has been a slight improvement in perceptions of local roads among urban motorists (4.6, up from 4.4), regional motorists are marginally less happy with the state of roads in their local area (3.8, down from 3.9).



As found in 1999, the condition of roads is a higher priority to regional motorists, and they give lower ratings to roads compared to urban motorists - especially the roads in their local area. However, while roads are an issue in regional Australia, petrol prices are clearly their No. 1 concern and priority in 2000.

### 3.10 Summary Tables

The results of the October 2000 ANOP national survey of motorists are encapsulated in the following seven tables:

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3. Concern about Petrol Pricing Issues .....	21
4. Knowledge of Petrol Tax.....	22-23
5. What Should Be Done to Reduce the Amount Motorists Spend on Petrol .....	24
6. What Should the Federal Government Do about Petrol Taxes and Prices.....	25
7. Condition of Roads .....	26

# 1. MOTORISTS' AGENDA

## A. What are the Key Issues for Motorists?

*In October 2000, motorists were asked to nominate, in an open-ended question, the most important issues or problems personally affecting them as a car driver. The **same** motorists were asked the **same** question in **September 1999**. %'s overadd as some mentioned more than one issue.*

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
<b>TOP SINGLE ISSUE:</b>				
<b>Petrol prices. Fuel costs</b>	25	52	26	56
<b>SUMMARY OF ISSUES:</b>				
1. <b>Motoring costs.</b> Petrol prices. Running costs. Rego. Insurance	32	54	32	57
2. <b>Other drivers' behaviour.</b> Way they drive. Reckless. Aggressive. Impatient. Skills. Stereotypes	32	28	26	20
3. <b>Condition of roads.</b> Poor. Inadequate. Dangerous	19	22	24	34
4. <b>Safety. Road accidents.</b> Road safety. Speeding. Unsafe cars. Drink driving	14	16	15	12
5. <b>Traffic congestion.</b> Jams, delays. Traffic	14	12	2	2



## B. Is this Affecting Car Usage?

*The same motorists, in September 1999 and October 2000 were asked how often they drive. The same question was also asked to different national samples in 1995 and 1997. **Key change:** Upward trend in driving frequency halted. Mainly in capital cities (down 6% in year 2000).*

	ALL MOTORISTS			
	1995 %	1997 %	1999 %	2000 %
Drive every or most days	83	87	91	87

## 2. PETROL PRICES: AWARENESS & BEHAVIOUR

### How Well Do Motorists Know Petrol Prices?

*The same motorists, who in September 1999 were asked which one of four statements described the extent to which they took account of petrol prices, were asked the identical question again in October 2000.*

PETROL PRICES:	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
• Close eye ... know exactly	40	45	39	<b>50</b>
• Fairly good idea	39	42	38	36
• Only a rough idea	13	10	12	10
• Don't pay much attention	8	3	11	4
<b>At least a fairly good idea</b>	<b>79</b>	<b>87</b>	<b>77</b>	<b>86</b>

### Use of Supermarket Dockets for Discounted Petrol

<i>Whether used supermarket docket to obtain discounted petrol:</i>	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
Yes. Used docket	25	33	31	35

### Awareness of Rebate to Reduce the Impact of the GST on Country Petrol Prices

*Motorists were asked if they are aware or not of the 1-2 cent rebate on the price of petrol in country areas to reduce the impact of the GST on country petrol prices. If aware, they were asked if local service stations in country areas are passing on the rebate to motorists or not.*

OCTOBER 2000	ALL MOTORISTS %	REGIONAL MOTORISTS %
Aware of rebate to reduce impact of GST	48	48
<b><i>Is the rebate being passed on to motorists?:</i></b>	▽	▽
Yes. Local service stations passing it on	4	6
No. Local service stations <u>not</u> passing it on	14	15
Some are, some aren't	1	1
Unsure	29	26

### 3. CONCERN ABOUT PETROL PRICING ISSUES

#### A. Level of Concern About Petrol Pricing Issues

The same motorists from the 1999 survey were again in October 2000 asked to rate their level of concern about 4 petrol pricing issues, on a scale of 1 to 7. [7= extremely concerned, 4= midway, 1= not concerned at all].

PRICING ISSUES:		Concerned			Mid-way 4 %	Not Con- cerned 1-3 %	Total Con- cerned 5-7 %	Trend
		7 %	6 %	5 %				
• <b>Current petrol price</b>	Sept 1999	41	24	15	11	8	80	(+9%)
	Oct 2000	<b>62</b>	19	8	6	5	<b>89</b>	
• <b>Tax collected from petrol</b>	Sept 1999	38	18	16	12	12	72	(+12%)
	Oct 2000	<b>56</b>	18	10	7	8	<b>84</b>	
• <b>Variations in petrol prices</b>	Sept 1999	38	23	15	11	12	76	(+6%)
	Oct 2000	45	23	14	9	9	82	
• <b>City-Country price diff.</b>	Sept 1999	37	20	16	11	13	73	(-2%)
	Oct 2000	37	19	15	15	12	71	



#### B. Mean Ratings of Concern About Petrol Pricing Issues

Converting the 7 point scale ratings to "mean" ratings.

		All Motorists	Urban Motorists	Regional Motorists	Trend
• <b>Current petrol price</b> [mean ratings]	Sept 1999	5.7	5.7	5.9	Up substantially all areas
	Oct 2000	<b>6.2</b>	6.2	6.3	
• <b>Tax collected from petrol</b> [mean ratings]	Sept 1999	5.5	5.4	5.6	Up substantially all areas
	Oct 2000	<b>6.0</b>	6.0	6.0	
• <b>Variations in petrol prices</b> [mean ratings]	Sept 1999	5.6	5.6	5.4	Up less so - mainly urban
	Oct 2000	5.8	<b>5.9</b>	5.5	
• <b>City-Country price diff.</b> [mean ratings]	Sept 1999	5.5	5.2	6.2	Little change
	Oct 2000	5.4	5.2	6.0	

## 4. KNOWLEDGE OF PETROL TAX

Perceived Amount of Federal Government Petrol Tax			Perceived Amount of Petrol Tax Spent on Roads		
<i>Motorists were asked how many cents from each litre of petrol goes to the Federal Government in tax</i>			<i>After being informed the Fed Govt receives 38 cents, they were asked how many cents are spent on roads</i>		
<b>OCTOBER 2000</b>	<b>All Motorists %</b>	<b>Regional Motorists %</b>	<b>OCTOBER 2000</b>	<b>All Motorists %</b>	<b>Regional Motorists %</b>
Underestimate (0-34c)	20	18	Underestimate (0-3c)	9	9
Close to correct (35-40c)	22	23	Close to correct (4-6c)	19	18
Overestimate (40c+)	48	46	Overestimate (7c+)	67	68
Unsure	10	13	Unsure	5	5
• % correct (38c)	3	3	• % correct (5c)	12	13
• <b>Mean guesstimate</b>	<b>41c</b>	<b>41c</b>	• <b>Mean guesstimate</b>	<b>11c</b>	<b>11c</b>

Key Comparisons		
PERCEIVED AMOUNT OF FEDERAL GOVERNMENT PETROL TAX:		
	<b>ALL MOTORISTS</b>	<b>REGIONAL MOTORISTS</b>
	----- <i>Mean guesstimates</i> -----	
<b>Sept 1999:</b> Petrol tax (35c) was <b>underestimated</b> .....	28c.....	29c
<b>Oct 2000:</b> Petrol tax (38c) is now <b>slightly overstated</b> .....	41c.....	41c
PERCEIVED AMOUNT OF PETROL TAX SPENT ON ROADS:		
	<b>ALL MOTORISTS</b>	<b>REGIONAL MOTORISTS</b>
	----- <i>Mean guesstimates</i> -----	
<b>Sept 1999:</b> Amount spent on roads (6c) was <b>overestimated</b> .....	12c.....	12c
<b>Oct 2000:</b> Amount spent on roads (5c) again <b>overestimated</b> ....	11c.....	11c

#### 4. KNOWLEDGE OF PETROL TAX (Cont.)

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

*In October 2000, motorists were informed that 5 cents out of the 38 cents is spent on roads - and asked whether this is about the right amount, or should be higher or lower. In September 1999 the equivalent amount was 6 cents out of 35 cents - thus, **the amount going to roads was relatively higher in 1999.***

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
Should be higher	92	90	96	93
About right	5	6	2	5
Should be lower	1	1	-	-
Don't know enough. Unsure	2	3	1	2

##### Degree of Concern Among Those Saying the Amount of Petrol Tax Spent on Roads "Should Be Higher"

*In both September 1999 and October 2000, those 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.*

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
<b>"Should be higher"</b>	<b>92</b>	<b>90</b>	<b>96</b>	<b>93</b>
Rating scale:	▽	▽	▽	▽
7	41	42	47	54
6 } Concerned	23	23	24	21
5 }	18	17	16	11
4 } Midway	6	6	5	5
1-3 } Not concerned	4	2	4	2
<b>Total concerned</b>	<b>82</b>	<b>82</b>	<b>87</b>	<b>86</b>
Mean rating among those saying "should be higher"	6.0	6.1	6.1	6.3

##### Key Trends

**There is a relatively stable level of concern overall** : 86% of regional motorists "concerned" in 2000, compared to 87% in 1999 - and 82% of all motorists "concerned" in both surveys. While the mean rating of concern about this issue is slightly higher among regional motorists in October 2000 (6.3, compared to 6.1 in Sept '99), the number of motorists rating their concern has decreased slightly (93%, compared to 96% in Sept '99).

## 5. WHAT SHOULD BE DONE TO REDUCE THE AMOUNT MOTORISTS SPEND ON PETROL

### Level of Support for 4 Ways of Reducing the Amount Motorists Spend on Petrol

*Motorists were asked which of 4 alternatives they support **most** and **second most** as ways of reducing the amount motorists spend on petrol. This table shows the results for the 'one most supported' and the 'top 2 supported' (one most + second most). The 'top 2' adds to less than 100% because not all motorists nominated 2 ways.*

<b>OCTOBER 2000</b>	<b>ALL MOTORISTS</b>		<b>REGIONAL MOTORISTS</b>	
4 WAYS OF REDUCING PETROL SPEND	Support Most %	Top 2 Supported %	Support Most %	Top 2 Supported %
• Federal Government change tax on petrol	64	85	64	85
• Petrol companies change pricing policies	13	55	14	56
• Oil producing countries produce more oil	10	29	11	30
• Motorists drive less	10	22	8	18
None of these. Other	3	3	3	3

### Key Priority: Reduce Petrol Tax or Keep it to Fund Other Areas?

*Motorists were informed that the Federal Government says that if it reduces the tax on petrol it will have to reduce spending on other areas - and asked what they think should happen.*

<b>OCTOBER 2000</b>	<b>ALL MOTORISTS %</b>	<b>REGIONAL MOTORISTS %</b>
WHAT SHOULD HAPPEN?		
• Federal Government reduce the petrol tax to make petrol cheaper	68	70
• Federal Government keep the petrol tax as it is to fund other areas	19	18
Depends on what petrol tax revenue is spent on	9	9
Unsure	4	3

## 6. WHAT SHOULD THE FEDERAL GOVERNMENT DO ABOUT PETROL TAXES AND PRICES

### Perceived Priorities for Federal Govt on Petrol Taxes & Prices

*Motorists were asked to rate the importance of six things the Federal Government could do about petrol taxes and prices on a 1 to 7 scale, where '7' means extremely important, '6' very important, '5' fairly important, '4' midway, '3' fairly unimportant, '2' very unimportant and '1' extremely unimportant. %s add to 100% minus the small unsure minorities.*

OCTOBER 2000	Important			Mid-way 4 %	Unim- portant 1-3 %	Total Important 5-7 %
	7 %	6 %	5 %			
1. Reduce amount of tax on petrol	51	22	14	6	6	87
2. <i>Aware of indexation*</i> : Freeze the tax on petrol (stop automatic increases in line with inflation)	51	20	14	9	5	85
3. Spend more of petrol tax on roads	48	22	15	9	6	85
4. Put pressure on oil companies to keep petrol prices down	43	25	16	7	8	84
5. Lobby oil producing countries to produce more oil	23	15	19	18	23	57
6. Maintain current petrol tax system to keep federal budget in surplus	12	12	20	23	29	44

\* **68%** indicate they are **aware** that the petrol tax is automatically increased in line with inflation.

### Mean Ratings of Perceived Federal Government Priorities

*Converting the 7 point ratings to "mean" ratings.*

OCTOBER 2000	ALL MOTORISTS Mean	REGIONAL MOTORISTS Mean
PERCEIVED IMPORTANCE FOR FEDERAL GOVERNMENT		
1. Reduce amount of tax on petrol	6.0	6.1
2. <i>Aware of indexation</i> : Freeze the tax on petrol (stop automatic increases in line with inflation)	6.0	6.0
3. Spend more of the petrol tax on roads	5.9	6.2
4. Put pressure on oil companies to keep petrol prices down	5.9	6.1
5. Lobby oil producing countries to produce more oil	4.7	5.1
6. Maintain current petrol tax system to keep federal budget in surplus	4.2	4.2

## 7. CONDITION OF ROADS

### A. Perceived Condition of Highways, Major Arterials and Local Roads

*The same motorists were asked to rate the three categories of roads in the same way in both September 1999 and October 2000 - ie 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 100% minus the small unsure minorities.*

		Excel- lent 7 %	Very Good 6 %	Good 5 %	Aver- age 4 %	Nega- tive 1-3 %	Total Positive 5-7 %	Trend
<ul style="list-style-type: none"> <li><b>Major highways</b> (between cities/towns)</li> </ul>	Sept 1999	7	27	35	18	10	69	
	Oct 2000	9	33	35	15	7	77	(+8%)
<ul style="list-style-type: none"> <li><b>Major arterials</b> (within cities/towns)</li> </ul>	Sept 1999	5	20	34	25	13	59	
	Oct 2000	5	25	38	21	10	68	(+9%)
<ul style="list-style-type: none"> <li><b>Local roads</b> (in your own area)</li> </ul>	Sept 1999	5	18	24	26	27	47	
	Oct 2000	4	15	31	28	22	50	(+3%)



### B. Mean Ratings of the Perceived Condition of Roads - Urban vs Regional

*Converting the 7 point scale ratings to "mean" ratings.*

		All Motorists	Urban Motorists	Regional Motorists	Trend
<ul style="list-style-type: none"> <li><b>Major highways</b> [mean ratings]</li> </ul>	Sept 1999	5.0	5.0	5.0	Up, mainly in urban
	Oct 2000	5.2	5.3	5.1	
<ul style="list-style-type: none"> <li><b>Major arterials</b> [mean ratings]</li> </ul>	Sept 1999	4.7	4.7	4.7	Up, mainly in urban
	Oct 2000	4.9	4.9	4.8	
<ul style="list-style-type: none"> <li><b>Local roads</b> [mean ratings]</li> </ul>	Sept 1999	4.3	4.4	3.9	Up in urban
	Oct 2000	4.4	4.6	3.8	

#### **4. TABULAR ANALYSIS OF GEOGRAPHIC DIFFERENCES AND TRENDS**

In this section, each of the 7 summary tables (also contained in Section 3: Analysis of Main Survey Results) is followed by a detailed tabular analysis of the results by:

- ◇ **Club Member**
- ◇ **Location:** Urban; Regional
- ◇ **State:** NSW/ACT; Victoria; Queensland; South Australia; Western Australia; Tasmania; Northern Territory

The detailed tables contain comparative results for those questions asked in both the current October 2000 survey and the previous September 1999 study.

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## 1. MOTORISTS' AGENDA

### A. What are the Key Issues for Motorists?

*In October 2000, motorists were asked to nominate, in an open-ended question, the most important issues or problems personally affecting them as a car driver. The **same** motorists were asked the **same** question in **September 1999**. %'s overadd as some mentioned more than one issue.*

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
<b>TOP SINGLE ISSUE:</b>				
<b>Petrol prices.</b> Fuel costs	25	52	26	56
<b>SUMMARY OF ISSUES:</b>				
1. <b>Motoring costs.</b> Petrol prices. Running costs. Rego. Insurance	32	54	32	57
2. <b>Other drivers' behaviour.</b> Way they drive. Reckless. Aggressive. Impatient. Skills. Stereotypes	32	28	26	20
3. <b>Condition of roads.</b> Poor. Inadequate. Dangerous	19	22	24	34
4. <b>Safety. Road accidents.</b> Road safety. Speeding. Unsafe cars. Drink driving	14	16	15	12
5. <b>Traffic congestion.</b> Jams, delays. Traffic	14	12	2	2



### B. Is this Affecting Car Usage?

*The same motorists, in September 1999 and October 2000 were asked how often they drive. The same question was also asked to different national samples in 1995 and 1997. **Key change:** Upward trend in driving frequency halted. Mainly in capital cities (down 6% in year 2000).*

	ALL MOTORISTS			
	1995 %	1997 %	1999 %	2000 %
Drive every or most days	83	87	91	87

<b>The Key Issues for Motorists - In More Detail</b>			
<i>Motorists were asked to nominate, in an open-ended question, the most important issues or problems personally affecting them as a car driver. % overadd as some mentioned more than one issue.</i>			
OCTOBER 2000	TOTAL %	Urban %	Regional %
<b>THE TOP ISSUE:</b>			
1. <b>Motoring costs.</b> Price of petrol, fuel (52%). Cost of rego & insurance (5%). Car running costs (3%). Cost of buying a car (1%). Expensive generally (1%)	54	53	57
<b>FOLLOWED BY:</b>			
2. <b>Other drivers' behaviour.</b> Reckless, aggressive, road rage (10%). Way other people drive (6%). Poor attitudes - irresponsible, impatient (6%). Lack of skills training (4%). 'Stereotypes' - young, old, women (4%)	28	31	20
3. <b>Condition of roads.</b> Poor. Inadequate. Dangerous	22	17	34
4. <b>Safety. Road accidents.</b> Road safety. Speeding. Unsafe cars. Drink driving	16	18	12
5. <b>Traffic congestion.</b> Jams, delays. Traffic	12	15	3
- Main responses to open-ended question -			

The single most frequently mentioned issue is the **price of petrol** (52%) - and this is spontaneously raised by over one-half of motorists in both urban (51%) and regional areas (56%).

<b>Spontaneously Perceived Most Important Issues Personally Affecting Car Drivers - The Top 5 Issues</b>						
<i>Q: Thinking about issues that affect car drivers. What do you think are the most important issues or problems personally affecting you as a car driver at the moment? What other issues or problems are of concern to you as a car driver?</i>						
<b>SEPTEMBER 1999</b>	<b>Single Issue</b>	<b>Top 5 Summary Issues</b>				
	<b>Petrol Prices %</b>	<b>Motoring Costs# %</b>	<b>Other Drivers' Behaviour %</b>	<b>Conditions of Roads %</b>	<b>Safety. Road Accidents %</b>	<b>Traffic Congestion %</b>
<b>TOTAL</b>	<b>25</b>	<b>32</b>	<b>32</b>	<b>19</b>	<b>14</b>	<b>14</b>
<b>Club Member</b>	26	33	31	20	14	16
<b>Location</b>						
Urban	24	33	34	17	14	18
Regional	26	32	26	24	15	2
<b>State</b>						
NSW/ACT	19	30	32	20	13	20
Victoria	32	38	30	18	13	12
Queensland	21	28	35	21	14	9
South Australia	33	41	23	16	16	9
Western Australia	27	30	35	17	21	10
Tasmania	22	26	35	16	22	3
Northern Territory	30	38	41	7	19	2
<b>OCTOBER 2000</b>	<b>Single Issue</b>	<b>Top 5 Summary Issues</b>				
	<b>Petrol Prices %</b>	<b>Motoring Costs# %</b>	<b>Other Drivers' Behaviour %</b>	<b>Conditions of Roads %</b>	<b>Safety. Road Accidents %</b>	<b>Traffic Congestion %</b>
<b>TOTAL</b>	<b>52</b>	<b>54</b>	<b>28</b>	<b>22</b>	<b>16</b>	<b>12</b>
<b>Club Member</b>	50	52	29	21	18	13
<b>Location</b>						
Urban	51	53	31	17	18	15
Regional	56	57	20	34	12	3
<b>State</b>						
NSW/ACT	43	46	30	24	17	17
Victoria	58	59	28	20	17	13
Queensland	59	60	28	21	14	8
South Australia	57	58	32	13	18	5
Western Australia	61	62	18	25	18	6
Tasmania	44	46	22	24	13	-
Northern Territory	53	57	32	16	15	-

# Note: Petrol prices are summarised under this heading

Table 1.3

<b>Reported Car Usage</b>							
<i>Q: How many days a week do you drive - every day, most days, only some days, or less than once a week?</i>							
	SEPTEMBER 1999			OCTOBER 2000			
	Every Day %	Most Days %	Less Often %	Every Day %	Most Days %	Less Often %	
<b>TOTAL</b>	<b>63</b>	<b>28</b>	<b>9</b>	<b>57</b>	<b>30</b>	<b>13</b>	
<b>Club Member</b>	62	29	9	54	32	14	
<b>Location</b>							
Urban	63	29	8	55	32	13	
Regional	63	25	12	62	25	13	
<b>State</b>							
NSW/ACT	63	28	9	56	33	11	
Victoria	61	30	9	57	30	13	
Queensland	66	25	9	56	24	20	
South Australia	61	29	10	57	31	12	
Western Australia	69	26	5	62	27	11	
Tasmania	60	31	9	55	31	14	
Northern Territory	70	20	10	73	23	4	

## 2. PETROL PRICES: AWARENESS & BEHAVIOUR

### How Well Do Motorists Know Petrol Prices?

*The same motorists, who in September 1999 were asked which one of four statements described the extent to which they took account of petrol prices, were asked the identical question again in October 2000.*

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
<b>PETROL PRICES:</b>				
• Close eye ... know exactly	40	45	39	<b>50</b>
• Fairly good idea	39	42	38	36
• Only a rough idea	13	10	12	10
• Don't pay much attention	8	3	11	4
<b>At least a fairly good idea</b>	<b>79</b>	<b>87</b>	<b>77</b>	<b>86</b>

### Use of Supermarket Dockets for Discounted Petrol

<i>Whether used supermarket docket to obtain discounted petrol:</i>	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
Yes. Used docket	25	33	31	35

### Awareness of Rebate to Reduce the Impact of the GST on Country Petrol Prices

*Motorists were asked if they are aware or not of the 1-2 cent rebate on the price of petrol in country areas to reduce the impact of the GST on country petrol prices. If aware, they were asked if local service stations in country areas are passing on the rebate to motorists or not.*

	ALL MOTORISTS %	REGIONAL MOTORISTS %
<b>OCTOBER 2000</b>		
Aware of rebate to reduce impact of GST	48	48
<b><i>Is the rebate being passed on to motorists?:</i></b>	▽	▽
Yes. Local service stations passing it on	4	6
No. Local service stations <u>not</u> passing it on	14	15
Some are, some aren't	1	1
Unsure	29	26

Table 2.1

<b>How Well Do Motorists Know Petrol Prices?</b>								
Q: I'd now like to ask you some questions about <b>petrol prices</b> . Which one of these statements best describes how much you know about petrol prices? (1) I keep a close watch on petrol prices and know exactly what the price per litre is; (2) I have a fairly good idea of the price per litre; (3) I only have a rough idea of the price per litre; (4) I don't pay much attention to the price of petrol.								
	SEPTEMBER 1999				OCTOBER 2000			
	Keep Close Watch %	Fairly Good Idea %	Only Rough Idea %	Don't Pay Much Attention %	Keep Close Watch %	Fairly Good Idea %	Only Rough Idea %	Don't Pay Much Attention %
<b>TOTAL</b>	<b>40</b>	<b>39</b>	<b>13</b>	<b>8</b>	<b>45</b>	<b>42</b>	<b>10</b>	<b>3</b>
<b>Club Member</b>	41	41	11	7	46	42	9	3
<b>Location</b>								
Urban	40	40	13	7	43	44	10	3
Regional	39	38	12	11	50	36	10	4
<b>State</b>								
NSW/ACT	41	40	12	7	49	37	9	5
Victoria	40	39	11	9	47	41	10	2
Queensland	38	38	15	9	43	41	13	3
South Australia	39	36	14	11	35	51	10	4
Western Australia	37	43	12	8	40	50	9	1
Tasmania	31	39	17	13	43	50	5	2
Northern Territory	27	44	16	13	35	53	7	5

Table 2.2

<b>Use of Supermarket Dockets for Discounted Petrol</b>				
<i>Q: Have you ever used supermarket docket to obtain discounts on petrol or not?</i>				
	<b>SEPTEMBER 1999</b>		<b>OCTOBER 2000</b>	
	<b>Yes, Used Supermarket Docket %</b>	<b>No, Not Used Supermarket Docket %</b>	<b>Yes, Used Supermarket Docket %</b>	<b>No, Not Used Supermarket Docket %</b>
<b>TOTAL</b>	<b>25</b>	<b>75</b>	<b>33</b>	<b>67</b>
<b>Club Member</b>	26	74	32	68
<b>Location</b>				
Urban	23	77	32	68
Regional	31	69	35	65
<b>State</b>				
NSW/ACT	26	74	29	71
Victoria	31	69	39	61
Queensland	23	77	32	68
South Australia	18	82	27	73
Western Australia	15	85	31	69
Tasmania	45	55	47	53
Northern Territory	34	66	48	52

<b>Awareness of Rebate to Reduce the Impact of the GST on Country Petrol Prices</b>						
Q: Are you aware or not aware that there is a one or two cent rebate on the price of petrol in country areas to reduce the impact of the GST on country petrol prices?						
Q: If Aware: Do you know if local service stations in country areas are passing on the one or two cent rebate to motorists or not?						
			<b>OCTOBER 2000</b>			
	Aware of Rebate %	➤	Stations Passing on Rebate %	Stations <u>Not</u> Passing on Rebate %	Some Are, Some Aren't %	Unsure %
<b>TOTAL</b>	<b>48</b>	➤	<b>4</b>	<b>14</b>	<b>1</b>	<b>29</b>
<b>Club Member</b>	49	➤	5	13	1	30
<b>Location</b>						
Urban	48	➤	3	13	1	31
Regional	48	➤	6	15	1	26
<b>State</b>						
NSW/ACT	48	➤	5	13	*	30
Victoria	49	➤	4	18	*	27
Queensland	52	➤	5	14	2	31
South Australia	43	➤	3	7	-	33
Western Australia	40	➤	2	10	2	26
Tasmania	53	➤	3	15	5	30
Northern Territory	49	➤	3	13	-	33

\* Indicates less than ½%

### 3. CONCERN ABOUT PETROL PRICING ISSUES

#### A. Level of Concern About Petrol Pricing Issues

The same motorists from the 1999 survey were again in October 2000 asked to rate their level of concern about 4 petrol pricing issues, on a scale of 1 to 7. [7= extremely concerned, 4= midway, 1= not concerned at all].

PRICING ISSUES:		Concerned			Mid-way 4 %	Not Con- cerned 1-3 %	Total Con- cerned 5-7 %	Trend
		7 %	6 %	5 %				
• <b>Current petrol price</b>	Sept 1999	41	24	15	11	8	80	(+9%)
	Oct 2000	<b>62</b>	19	8	6	5	<b>89</b>	
• <b>Tax collected from petrol</b>	Sept 1999	38	18	16	12	12	72	(+12%)
	Oct 2000	<b>56</b>	18	10	7	8	<b>84</b>	
• <b>Variations in petrol prices</b>	Sept 1999	38	23	15	11	12	76	(+6%)
	Oct 2000	45	23	14	9	9	82	
• <b>City-Country price diff.</b>	Sept 1999	37	20	16	11	13	73	(-2%)
	Oct 2000	37	19	15	15	12	71	



#### B. Mean Ratings of Concern About Petrol Pricing Issues

Converting the 7 point scale ratings to "mean" ratings.

		All Motorists	Urban Motorists	Regional Motorists	Trend
• <b>Current petrol price</b> [mean ratings]	Sept 1999	5.7	5.7	5.9	Up substantially all areas
	Oct 2000	<b>6.2</b>	6.2	6.3	
• <b>Tax collected from petrol</b> [mean ratings]	Sept 1999	5.5	5.4	5.6	Up substantially all areas
	Oct 2000	<b>6.0</b>	6.0	6.0	
• <b>Variations in petrol prices</b> [mean ratings]	Sept 1999	5.6	5.6	5.4	Up less so - mainly urban
	Oct 2000	5.8	<b>5.9</b>	5.5	
• <b>City-Country price diff.</b> [mean ratings]	Sept 1999	5.5	5.2	6.2	Little change
	Oct 2000	5.4	5.2	6.0	

Table 3.1

<b>Level of Concern about <u>Current Price of Petrol</u></b>							
Q: How would you rate your level of concern about <b>the current price of petrol</b> on the scale of '1' to '7'. '7' means extremely concerned, '1' means <u>not</u> concerned at all, and '4' is midway.							
	Concerned			Mid-way	Not Concerned	Total Concerned	Mean
	7 %	6 %	5 %	4 %	1-3 %	5-7 %	
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>41</b>	<b>24</b>	<b>15</b>	<b>11</b>	<b>8</b>	<b>80</b>	<b>5.7</b>
<b>Club Member</b>	41	24	16	12	7	81	5.7
<b>Location</b>							
Urban	38	24	17	12	8	79	5.7
Regional	48	25	11	8	8	84	5.9
<b>State</b>							
NSW/ACT	40	27	14	10	9	81	5.7
Victoria	45	21	17	11	6	83	5.8
Queensland	35	24	15	14	11	74	5.5
South Australia	43	22	14	12	9	79	5.7
Western Australia	44	25	14	12	5	83	5.9
Tasmania	42	25	17	9	7	84	5.8
Northern Territory	46	17	17	8	10	80	5.7
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>62</b>	<b>19</b>	<b>8</b>	<b>6</b>	<b>5</b>	<b>89</b>	<b>6.2</b>
<b>Club Member</b>	58	20	10	7	5	88	6.2
<b>Location</b>							
Urban	59	21	10	5	5	90	6.2
Regional	71	12	5	8	4	88	6.3
<b>State</b>							
NSW/ACT	61	18	8	8	5	87	6.2
Victoria	62	20	10	5	3	92	6.3
Queensland	59	18	8	7	8	85	6.0
South Australia	66	23	6	2	3	95	6.4
Western Australia	72	15	7	3	3	94	6.5
Tasmania	51	21	13	8	7	85	5.9
Northern Territory	65	28	3	-	4	96	6.5

Table 3.2

<b>Level of Concern about <u>Tax Collected from Petrol</u></b>							
Q: How would you rate your level of concern about <b>the amount of tax collected by government from the price of petrol</b> on the scale of '1' to '7'. '7' means extremely concerned, '1' means <u>not</u> concerned at all, and '4' is midway.							
	Concerned			Mid-way	Not Concerned	Total Concerned	
	7	6	5	4	1-3	5-7	Mean
	%	%	%	%	%	%	
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>38</b>	<b>18</b>	<b>16</b>	<b>12</b>	<b>12</b>	<b>72</b>	<b>5.5</b>
<b>Club Member</b>	37	17	17	12	13	71	5.4
<b>Location</b>							
Urban	38	17	16	12	13	71	5.4
Regional	38	22	15	11	9	75	5.6
<b>State</b>							
NSW/ACT	36	21	17	13	10	74	5.5
Victoria	37	15	18	12	13	70	5.4
Queensland	34	16	15	12	17	65	5.2
South Australia	57	14	10	6	9	81	5.9
Western Australia	37	22	16	12	11	75	5.5
Tasmania	32	25	15	9	14	72	5.4
Northern Territory	34	16	15	17	13	65	5.3
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>56</b>	<b>18</b>	<b>10</b>	<b>7</b>	<b>8</b>	<b>84</b>	<b>6.0</b>
<b>Club Member</b>	55	18	11	7	9	84	6.0
<b>Location</b>							
Urban	54	19	11	7	8	84	6.0
Regional	59	16	9	8	8	84	6.0
<b>State</b>							
NSW/ACT	53	21	10	6	9	84	6.0
Victoria	56	16	13	7	7	85	6.0
Queensland	54	14	12	8	11	80	5.8
South Australia	59	20	5	9	7	84	6.1
Western Australia	66	14	11	6	3	91	6.3
Tasmania	45	24	5	12	12	74	5.6
Northern Territory	47	24	12	9	7	83	5.9

Table 3.3

<b>Level of Concern about <u>Variations in Petrol Prices</u></b>							
Q: How would you rate your level of concern about <b>variations in the price of petrol from day to day</b> on the scale of '1' to '7'. '7' means <b>extremely concerned</b> , '1' means <b>not concerned at all</b> , and '4' is <b>midway</b> .							
	Concerned			Mid-way	Not Concerned	Total Concerned	
	7	6	5	4	1-3	5-7	Mean
	%	%	%	%	%	%	
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>38</b>	<b>23</b>	<b>15</b>	<b>11</b>	<b>12</b>	<b>76</b>	<b>5.6</b>
<b>Club Member</b>	38	25	14	11	11	77	5.6
<b>Location</b>							
Urban	40	23	15	11	11	78	5.6
Regional	32	24	15	11	14	71	5.4
<b>State</b>							
NSW/ACT	40	25	15	9	10	80	5.7
Victoria	44	22	16	8	9	82	5.7
Queensland	30	22	13	16	16	65	5.2
South Australia	38	23	15	10	11	76	5.6
Western Australia	33	25	13	11	16	71	5.3
Tasmania	17	28	19	16	18	64	4.9
Northern Territory	19	17	17	20	21	53	4.7
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>45</b>	<b>23</b>	<b>14</b>	<b>9</b>	<b>9</b>	<b>82</b>	<b>5.8</b>
<b>Club Member</b>	44	23	16	8	9	83	5.8
<b>Location</b>							
Urban	47	22	14	8	8	83	5.9
Regional	39	24	15	9	13	78	5.5
<b>State</b>							
NSW/ACT	42	24	15	8	10	81	5.7
Victoria	50	22	14	8	6	86	6.0
Queensland	45	18	14	10	12	77	5.6
South Australia	36	32	12	10	10	80	5.6
Western Australia	54	19	17	5	5	90	6.1
Tasmania	20	21	17	26	15	58	4.9
Northern Territory	38	23	13	12	14	74	5.4

Table 3.4

<b>Level of Concern about <u>City and Country Price Difference</u></b>							
Q: How would you rate your level of concern about <b>the difference between the price of petrol in the country and the city</b> on the scale of '1' to '7'. '7' means extremely concerned, '1' means <u>not</u> concerned at all, and '4' is midway.							
	Concerned			Mid-way	Not Concerned	Total Concerned	Mean
	7	6	5	4	1-3	5-7	
SEPTEMBER 1999	%	%	%	%	%	%	
<b>TOTAL</b>	<b>37</b>	<b>20</b>	<b>16</b>	<b>11</b>	<b>13</b>	<b>73</b>	<b>5.5</b>
<b>Club Member</b>	36	20	16	12	13	72	5.4
<b>Location</b>							
Urban	30	20	18	13	16	68	5.2
Regional	58	18	11	6	5	87	6.2
<b>State</b>							
NSW/ACT	41	21	16	8	11	78	5.6
Victoria	43	17	14	13	12	74	5.6
Queensland	30	20	15	14	17	65	5.1
South Australia	38	19	19	12	11	76	5.5
Western Australia	27	20	19	14	15	66	5.2
Tasmania	24	28	16	13	16	68	5.2
Northern Territory	39	21	15	9	10	75	5.7
	Concerned			Mid-way	Not Concerned	Total Concerned	Mean
	7	6	5	4	1-3	5-7	
OCTOBER 2000	%	%	%	%	%	%	
<b>TOTAL</b>	<b>37</b>	<b>19</b>	<b>15</b>	<b>15</b>	<b>12</b>	<b>71</b>	<b>5.4</b>
<b>Club Member</b>	37	19	15	15	12	71	5.5
<b>Location</b>							
Urban	31	20	17	17	14	68	5.2
Regional	55	16	10	9	7	81	6.0
<b>State</b>							
NSW/ACT	40	19	12	15	12	71	5.5
Victoria	37	18	21	13	11	76	5.5
Queensland	37	17	14	16	14	68	5.3
South Australia	34	15	16	17	14	65	5.2
Western Australia	39	21	15	15	8	75	5.6
Tasmania	31	27	6	18	16	64	5.2
Northern Territory	31	24	22	10	11	77	5.4

**4. KNOWLEDGE OF PETROL TAX**

Perceived Amount of Federal Government Petrol Tax			Perceived Amount of Petrol Tax Spent on Roads		
<i>Motorists were asked how many cents from each litre of petrol goes to the Federal Government in tax</i>			<i>After being informed the Fed Govt receives 38 cents, they were asked how many cents are spent on roads</i>		
<b>OCTOBER 2000</b>	<b>All Motorists %</b>	<b>Regional Motorists %</b>	<b>OCTOBER 2000</b>	<b>All Motorists %</b>	<b>Regional Motorists %</b>
Underestimate (0-34c)	20	18	Underestimate (0-3c)	9	9
Close to correct (35-40c)	22	23	Close to correct (4-6c)	19	18
Overestimate (40c+)	48	46	Overestimate (7c+)	67	68
Unsure	10	13	Unsure	5	5
• % correct (38c)	3	3	• % correct (5c)	12	13
• <b>Mean guesstimate</b>	<b>41c</b>	<b>41c</b>	• <b>Mean guesstimate</b>	<b>11c</b>	<b>11c</b>

Key Comparisons			
PERCEIVED AMOUNT OF FEDERAL GOVERNMENT PETROL TAX:			
	ALL MOTORISTS	REGIONAL MOTORISTS	----- <i>Mean guesstimates</i> -----
<b>Sept 1999:</b>	Petrol tax (35c) was <b>underestimated</b> .....	28c.....	29c
<b>Oct 2000:</b>	Petrol tax (38c) is now <b>slightly overstated</b> .....	41c.....	41c
PERCEIVED AMOUNT OF PETROL TAX SPENT ON ROADS:			
	ALL MOTORISTS	REGIONAL MOTORISTS	----- <i>Mean guesstimates</i> -----
<b>Sept 1999:</b>	Amount spent on roads (6c) was <b>overestimated</b> .....	12c.....	12c
<b>Oct 2000:</b>	Amount spent on roads (5c) again <b>overestimated</b> ....	11c.....	11c

#### 4. KNOWLEDGE OF PETROL TAX (Cont.)

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

*In October 2000, motorists were informed that 5 cents out of the 38 cents is spent on roads - and asked whether this is about the right amount, or should be higher or lower. In September 1999 the equivalent amount was 6 cents out of 35 cents - thus, **the amount going to roads was relatively higher in 1999.***

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
Should be higher	92	90	96	93
About right	5	6	2	5
Should be lower	1	1	-	-
Don't know enough. Unsure	2	3	1	2

##### Degree of Concern Among Those Saying the Amount of Petrol Tax Spent on Roads "Should Be Higher"

*In both September 1999 and October 2000, those 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.*

	ALL MOTORISTS		REGIONAL MOTORISTS	
	Sept 1999 %	Oct 2000 %	Sept 1999 %	Oct 2000 %
<b>"Should be higher"</b>	<b>92</b>	<b>90</b>	<b>96</b>	<b>93</b>
Rating scale:	▽	▽	▽	▽
7 ]	41	42	47	54
6 ] Concerned	23	23	24	21
5 ]	18	17	16	11
4 ] Midway	6	6	5	5
1-3 ] Not concerned	4	2	4	2
<b>Total concerned</b>	<b>82</b>	<b>82</b>	<b>87</b>	<b>86</b>
Mean rating among those saying "should be higher"	6.0	6.1	6.1	6.3

##### Key Trends

**There is a relatively stable level of concern overall** : 86% of regional motorists "concerned" in 2000, compared to 87% in 1999 - and 82% of all motorists "concerned" in both surveys. While the mean rating of concern about this issue is slightly higher among regional motorists in October 2000 (6.3, compared to 6.1 in Sept '99), the number of motorists rating their concern has decreased slightly (93%, compared to 96% in Sept '99).

Table 4.1

<b>Perceived Amount of <u>Federal</u> Government Petrol Tax</b>						
<i>Q: I'd now like to ask you about <b>the amount of tax</b> that the Federal and State Governments receive from the price of petrol. First, how many cents from each litre of petrol goes to the <b>Federal Government</b>?</i>						
<b>SEPTEMBER 1999</b>	<b>Under-estimate (Under 30c) %</b>	<b>Close to Correct (30-39c) %</b>	<b>Over-estimate (40c+) %</b>	<b>Unsure %</b>	<b>Correct (35c) %</b>	<b>Mean Guesstimate</b>
<b>TOTAL</b>	<b>38</b>	<b>20</b>	<b>24</b>	<b>18</b>	<b>6</b>	<b>28c</b>
<b>Club Member</b>	39	18	25	18	6	28c
<b>Location</b>						
Urban	39	19	23	19	6	28c
Regional	36	21	25	18	6	29c
<b>State</b>						
NSW/ACT	42	18	22	18	5	27c
Victoria	33	21	25	21	6	30c
Queensland	40	20	18	22	7	26c
South Australia	29	22	40	9	9	33c
Western Australia	40	19	26	15	4	28c
Tasmania	47	18	15	20	4	24c
Northern Territory	38	19	23	20	5	28c
<b>OCTOBER 2000*</b>	<b>Under-estimate (0-34c) %</b>	<b>Close to Correct (35-40c) %</b>	<b>Over-estimate (41c+) %</b>	<b>Unsure %</b>	<b>Correct (38c) %</b>	<b>Mean Guesstimate</b>
<b>TOTAL</b>	<b>20</b>	<b>22</b>	<b>48</b>	<b>10</b>	<b>3</b>	<b>41c</b>
<b>Club Member</b>	20	23	47	10	4	41c
<b>Location</b>						
Urban	21	22	48	9	4	41c
Regional	18	23	46	13	3	41c
<b>State</b>						
NSW/ACT	23	22	45	10	2	40c
Victoria	18	21	51	10	5	43c
Queensland	23	27	38	12	5	38c
South Australia	13	24	54	9	4	43c
Western Australia	14	19	60	7	4	44c
Tasmania	22	16	50	12	2	43c
Northern Territory	30	17	43	10	-	42c

\* Note: The cents range used to define whether motorists are underestimating, close to correct or overestimating the level of tax has been adjusted to compensate for the increase in tax from 35c in 1999 to 38c in 2000.

Table 4.2

<b>Perceived Amount of Federal Government Petrol Tax Spent on Roads</b>						
Q: Just thinking about the <b>Federal Government petrol tax</b> and how much of it is <b>spent on roads</b> . (Actually/As you know) the Federal Government gets 35 cents in tax from each litre of petrol. How many cents, out of the 35 cents, do you think is spent on roads?						
<b>SEPTEMBER 1999</b>	<b>Under-estimate (0-4c) %</b>	<b>Close to Correct (5-9c) %</b>	<b>Over-estimate (10c+) %</b>	<b>Unsure %</b>	<b>Correct (6c) %</b>	<b>Mean Guesstimate</b>
<b>TOTAL</b>	<b>10</b>	<b>23</b>	<b>58</b>	<b>9</b>	<b>1</b>	<b>12c</b>
<b>Club Member</b>	10	23	59	8	1	12c
<b>Location</b>						
Urban	10	24	58	8	*	12c
Regional	10	21	57	12	2	12c
<b>State</b>						
NSW/ACT	12	25	55	8	1	11c
Victoria	7	22	61	10	1	12c
Queensland	10	21	57	12	-	12c
South Australia	12	26	57	5	*	11c
Western Australia	8	24	61	7	1	12c
Tasmania	19	20	55	6	1	11c
Northern Territory	10	17	62	11	-	13c
In October 2000, motorists were asked the same question above after being informed that the Federal Government gets 38 cents in tax from each litre of petrol. The cents range used to define whether motorists are underestimating, close to correct or overestimating the amount of tax going to roads has been adjusted in line with the decrease in tax allocated - from 6c in 1999 to 5c in 2000.						
<b>OCTOBER 2000</b>	<b>Under-estimate (0-3c) %</b>	<b>Close to Correct (4-6c) %</b>	<b>Over-estimate (7c+) %</b>	<b>Unsure %</b>	<b>Correct (5c) %</b>	<b>Mean Guesstimate</b>
<b>TOTAL</b>	<b>9</b>	<b>19</b>	<b>67</b>	<b>5</b>	<b>12</b>	<b>11c</b>
<b>Club Member</b>	8	17	70	5	11	11c
<b>Location</b>						
Urban	9	19	68	4	12	11c
Regional	9	18	68	5	13	11c
<b>State</b>						
NSW/ACT	6	23	68	3	13	11c
Victoria	14	16	65	5	9	11c
Queensland	10	17	68	5	13	11c
South Australia	8	18	71	3	14	11c
Western Australia	7	16	67	10	13	12c
Tasmania	9	20	67	4	13	10c
Northern Territory	6	28	59	7	21	10c

\* Indicates less than ½%

Table 4.3

<b>Perceived Adequacy of Amount of Federal Government Petrol Tax Spent on Roads (When Informed)</b>			
<i>Q: (Actually/As you know) 6 cents out of every 35 cents collected by the Federal Government petrol tax is spent on roads, and the rest is spent on other government expenditure. Do you think this is about the right amount going to roads - or should the amount going to roads be higher or lower?</i>			
<b>SEPTEMBER 1999</b>	<b>Should Be Higher %</b>	<b>About Right %</b>	<b>Should Be Lower %</b>
<b>TOTAL</b>	<b>92</b>	<b>5</b>	<b>1</b>
<b>Club Member</b>	92	6	1
<b>Location</b>			
Urban	91	6	1
Regional	96	2	-
<b>State</b>			
NSW/ACT	94	4	1
Victoria	92	7	*
Queensland	91	6	1
South Australia	96	3	1
Western Australia	91	7	1
Tasmania	93	4	-
Northern Territory	77	16	4
<i>In October 2000, motorists were asked the question above after being informed that 5 cents out of every 38 cents is spent on roads.</i>			
<b>OCTOBER 2000</b>	<b>Should Be Higher %</b>	<b>About Right %</b>	<b>Should Be Lower %</b>
<b>TOTAL</b>	<b>90</b>	<b>6</b>	<b>1</b>
<b>Club Member</b>	90	6	1
<b>Location</b>			
Urban	89	7	2
Regional	93	5	-
<b>State</b>			
NSW/ACT	92	3	1
Victoria	90	8	2
Queensland	88	8	2
South Australia	93	5	-
Western Australia	84	11	2
Tasmania	92	8	-
Northern Territory	84	13	-

\* Indicates less than ½%

Table 4.4

<b>Degree of Concern about Amount of Federal Government Petrol Tax Spent on Roads</b>							
<i>Those (92%) saying the amount spent on roads "should be higher" were asked ...</i>							
<i>Q: How would you rate your level of concern about this, on the scale of '1' to '7'. '7' means extremely concerned and '1' means <u>not</u> concerned at all?</i>							
	Concerned			Mid-way	Not Concerned	Total Concerned	
	7	6	5	4	(1-3)	(5-7)	Mean
	%	%	%	%	%	%	
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>41</b>	<b>23</b>	<b>18</b>	<b>6</b>	<b>4</b>	<b>82</b>	<b>6.0</b>
<b>Club Member</b>	38	25	18	6	4	81	5.9
<b>Location</b>							
Urban	39	23	18	6	5	80	5.9
Regional	47	24	16	5	4	87	6.1
<b>State</b>							
NSW/ACT	43	24	17	5	4	84	6.0
Victoria	41	23	16	6	5	80	5.9
Queensland	38	26	17	6	5	81	5.9
South Australia	44	21	18	7	5	83	5.9
Western Australia	38	20	23	6	3	81	5.9
Tasmania	31	27	27	4	4	85	5.8
Northern Territory	28	18	21	5	5	67	5.7
<i>In October 2000, those (90%) saying the amount spent on roads "should be higher" were asked the same question above.</i>							
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>42</b>	<b>23</b>	<b>17</b>	<b>6</b>	<b>2</b>	<b>82</b>	<b>6.1</b>
<b>Club Member</b>	39	24	18	6	3	81	6.0
<b>Location</b>							
Urban	38	23	19	7	2	80	6.0
Regional	54	21	11	5	2	86	6.3
<b>State</b>							
NSW/ACT	46	22	16	5	3	84	6.1
Victoria	38	26	16	7	2	80	6.0
Queensland	40	24	16	7	2	80	6.1
South Australia	43	22	24	3	1	89	6.1
Western Australia	42	17	16	8	1	75	6.1
Tasmania	42	22	19	9	-	83	6.1
Northern Territory	27	23	28	6	-	78	5.8

## 5. WHAT SHOULD BE DONE TO REDUCE THE AMOUNT MOTORISTS SPEND ON PETROL

### Level of Support for 4 Ways of Reducing the Amount Motorists Spend on Petrol

*Motorists were asked which of 4 alternatives they support **most** and **second most** as ways of reducing the amount motorists spend on petrol. This table shows the results for the 'one most supported' and the 'top 2 supported' (one most + second most). The 'top 2' adds to less than 100% because not all motorists nominated 2 ways.*

OCTOBER 2000	ALL MOTORISTS		REGIONAL MOTORISTS	
4 WAYS OF REDUCING PETROL SPEND	Support Most %	Top 2 Supported %	Support Most %	Top 2 Supported %
• Federal Government change tax on petrol	64	85	64	85
• Petrol companies change pricing policies	13	55	14	56
• Oil producing countries produce more oil	10	29	11	30
• Motorists drive less	10	22	8	18
None of these. Other	3	3	3	3

### Key Priority: Reduce Petrol Tax or Keep it to Fund Other Areas?

*Motorists were informed that the Federal Government says that if it reduces the tax on petrol it will have to reduce spending on other areas - and asked what they think should happen.*

OCTOBER 2000	ALL MOTORISTS %	REGIONAL MOTORISTS %
WHAT SHOULD HAPPEN?		
• Federal Government reduce the petrol tax to make petrol cheaper	68	70
• Federal Government keep the petrol tax as it is to fund other areas	19	18
Depends on what petrol tax revenue is spent on	9	9
Unsure	4	3

Table 5.1

<b>Level of Support for 4 Ways of Reducing the Amount Motorists Spend on Petrol</b>				
<p>Q: Here are four ways that the amount motorists spend on petrol could be reduced: oil producing countries could produce more oil, motorists could drive less, petrol companies could change their pricing policies or the Federal Government could change the tax on petrol. Which one of these do you support most? %s add to less than 100% because 3% did not nominate one.</p>				
	<b>WAYS SUPPORT MOST</b>			
<b>OCTOBER 2000</b>	<b>Fed. Gov. Change Tax %</b>	<b>Petrol Cos. Change Pricing %</b>	<b>Oil Countries - More Oil %</b>	<b>Drive Less %</b>
<b>TOTAL</b>	<b>64</b>	<b>13</b>	<b>10</b>	<b>10</b>
<b>Club Member</b>	63	13	10	10
<b>Location</b>				
Urban	65	12	9	11
Regional	64	14	11	8
<b>State</b>				
NSW/ACT	65	16	7	8
Victoria	68	9	10	12
Queensland	58	11	14	14
South Australia	64	9	11	7
Western Australia	65	16	9	7
Tasmania	58	16	10	15
Northern Territory	65	8	12	9
<p>Q: Which one of these [four ways] do you support second most? This table shows the 'top 2 supported' (one most &amp; second most). Figures add to less than 100% because not all motorists nominated 2 ways.</p>				
	<b>TOP 2 WAYS</b>			
<b>OCTOBER 2000</b>	<b>Fed. Gov. Change Tax %</b>	<b>Petrol Cos. Change Pricing %</b>	<b>Oil Countries - More Oil %</b>	<b>Drive Less %</b>
<b>TOTAL</b>	<b>85</b>	<b>55</b>	<b>29</b>	<b>22</b>
<b>Club Member</b>	85	55	29	23
<b>Location</b>				
Urban	85	55	28	24
Regional	85	56	30	18
<b>State</b>				
NSW/ACT	87	61	24	20
Victoria	85	53	27	28
Queensland	83	49	36	23
South Australia	80	51	32	14
Western Australia	87	51	35	19
Tasmania	80	68	23	24
Northern Territory	86	48	35	18

Table 5.2

<b>Key Priority: Reduce Petrol Tax <u>or</u> Keep it to Fund Other Areas</b>				
<i>Q: The Federal Government says that if it reduces the tax on petrol it will have to reduce spending on other areas. What do you think should happen? Should the Federal Government reduce the petrol tax to make petrol cheaper or keep the petrol tax as it is to fund other areas?</i>				
<b>OCTOBER 2000</b>	<b>Reduce Petrol Tax %</b>	<b>Fund Other Areas %</b>	<b>Depends What Spent on %</b>	<b>Unsure %</b>
<b>TOTAL</b>	<b>68</b>	<b>19</b>	<b>9</b>	<b>4</b>
<b>Club Member</b>	68	19	9	4
<b>Location</b>				
Urban	67	20	8	5
Regional	70	18	9	3
<b>State</b>				
NSW/ACT	68	18	11	3
Victoria	67	20	9	4
Queensland	64	24	6	6
South Australia	70	12	8	10
Western Australia	76	15	6	3
Tasmania	60	26	7	7
Northern Territory	70	18	10	2

## 6. WHAT SHOULD THE FEDERAL GOVERNMENT DO ABOUT PETROL TAXES AND PRICES

### Perceived Priorities for Federal Govt on Petrol Taxes & Prices

*Motorists were asked to rate the importance of six things the Federal Government could do about petrol taxes and prices on a 1 to 7 scale, where '7' means extremely important, '6' very important, '5' fairly important, '4' midway, '3' fairly unimportant, '2' very unimportant and '1' extremely unimportant. %s add to 100% minus the small unsure minorities.*

OCTOBER 2000	Important			Mid-way 4 %	Unim- portant 1-3 %	Total Important 5-7 %
	7 %	6 %	5 %			
1. Reduce amount of tax on petrol	51	22	14	6	6	87
2. <i>Aware of indexation*</i> : Freeze the tax on petrol (stop automatic increases in line with inflation)	51	20	14	9	5	85
3. Spend more of petrol tax on roads	48	22	15	9	6	85
4. Put pressure on oil companies to keep petrol prices down	43	25	16	7	8	84
5. Lobby oil producing countries to produce more oil	23	15	19	18	23	57
6. Maintain current petrol tax system to keep federal budget in surplus	12	12	20	23	29	44

\* **68%** indicate they are **aware** that the petrol tax is automatically increased in line with inflation.

### Mean Ratings of Perceived Federal Government Priorities

*Converting the 7 point ratings to "mean" ratings.*

OCTOBER 2000	ALL MOTORISTS Mean	REGIONAL MOTORISTS Mean
PERCEIVED IMPORTANCE FOR FEDERAL GOVERNMENT		
1. Reduce amount of tax on petrol	6.0	6.1
2. <i>Aware of indexation</i> : Freeze the tax on petrol (stop automatic increases in line with inflation)	6.0	6.0
3. Spend more of the petrol tax on roads	5.9	6.2
4. Put pressure on oil companies to keep petrol prices down	5.9	6.1
5. Lobby oil producing countries to produce more oil	4.7	5.1
6. Maintain current petrol tax system to keep federal budget in surplus	4.2	4.2

Table 6.1

<b>Perceived Federal Government Priorities - Reduce Amount of Tax on Petrol</b>							
Q: I'd now like you to rate the importance of some things the Federal Government could do about petrol taxes and prices, on a scale of '1' to '7'. '7' means extremely important, '6' means very important, '5' fairly important, '4' is midway, '3' is fairly unimportant, '2' is very unimportant and '1' means extremely unimportant. First, how important on the '1' to '7' scale is it for the Federal Government to <b>reduce the amount of tax on petrol?</b>							
OCTOBER 2000	Important			Mid-way	Unim- portant	Total	Mean
	7 %	6 %	5 %	4 %	1-3 %	5-7 %	
<b>TOTAL</b>	<b>51</b>	<b>22</b>	<b>14</b>	<b>6</b>	<b>6</b>	<b>87</b>	<b>6.0</b>
<b>Club Member</b>	49	22	15	6	7	86	5.9
<b>Location</b>							
Urban	52	21	15	5	7	88	6.0
Regional	51	25	11	7	4	87	6.1
<b>State</b>							
NSW/ACT	48	21	19	5	7	88	5.9
Victoria	54	24	12	4	5	90	6.1
Queensland	51	20	12	8	8	83	5.9
South Australia	58	20	5	12	4	83	6.1
Western Australia	56	21	14	4	4	91	6.1
Tasmania	44	28	9	8	11	81	5.8
Northern Territory	46	24	20	-	10	90	5.9

Table 6.2

<b>Perceived Federal Government Priorities - Freeze Indexation on Petrol Tax (Among Those 68% Aware)</b>								
Q: How important on the '1' to '7' scale is it for the Federal Government to <b>freeze the tax on petrol - by that I mean, stop the automatic increases of the petrol tax in line with inflation?</b> Note: the following results are based on those 68% of motorists who said they were aware that petrol tax is automatically increased in line with inflation.								
OCTOBER 2000	Important			Mid-way	Unim- portant	Total Import- ant 5-7 %	Mean	Those Aware %
	7 %	6 %	5 %	4 %	1-3 %			
<b>TOTAL AWARE</b>	<b>51</b>	<b>20</b>	<b>14</b>	<b>9</b>	<b>5</b>	<b>85</b>	<b>6.0</b>	<b>68</b>
<b>Club Member</b>	51	19	13	10	6	83	5.9	69
<b>Location</b>								
Urban	52	19	13	10	5	84	6.0	69
Regional	49	23	14	7	6	86	6.0	66
<b>State</b>								
NSW/ACT	53	24	12	8	3	89	6.1	66
Victoria	50	15	16	10	7	81	5.9	73
Queensland	48	24	11	11	6	83	5.9	64
South Australia	57	20	9	8	6	86	6.1	70
Western Australia	49	13	21	12	3	83	5.9	68
Tasmania	49	17	11	5	17	77	5.6	59
Northern Territory	54	21	10	10	5	85	6.0	68

Table 6.3

<b>Perceived Federal Government Priorities - Spend More of Petrol Tax on Roads</b>							
Q: How important on the '1' to '7' scale is it for the Federal Government to <i>spend more of the petrol tax on roads?</i>							
OCTOBER 2000	Important			Mid-way	Unim- portant	Total Important	Mean
	7 %	6 %	5 %	4 %	1-3 %		
<b>TOTAL</b>	<b>48</b>	<b>22</b>	<b>15</b>	<b>9</b>	<b>6</b>	<b>85</b>	<b>5.9</b>
<b>Club Member</b>	49	22	13	10	6	84	5.9
<b>Location</b>							
Urban	45	23	16	10	6	84	5.9
Regional	58	18	11	8	5	87	6.2
<b>State</b>							
NSW/ACT	48	26	12	8	5	86	6.0
Victoria	47	22	17	7	6	86	5.9
Queensland	52	14	15	13	5	81	5.9
South Australia	45	29	12	7	6	86	6.0
Western Australia	46	19	18	10	6	83	5.8
Tasmania	50	24	15	5	6	89	6.0
Northern Territory	37	17	23	14	9	77	5.5

Table 6.4

<b>Perceived Federal Government Priorities - Pressure Oil Companies to Keep Petrol Prices Down</b>							
<i>Q: How important on the '1' to '7' scale is it for the Federal Government to <b>put pressure on oil companies to keep petrol prices down?</b></i>							
OCTOBER 2000	Important			Mid-way	Unim- portant	Total Important	Mean
	7 %	6 %	5 %	4 %	1-3 %		
<b>TOTAL</b>	<b>43</b>	<b>26</b>	<b>16</b>	<b>7</b>	<b>8</b>	<b>85</b>	<b>5.9</b>
<b>Club Member</b>	43	23	17	8	8	83	5.8
<b>Location</b>							
Urban	42	24	17	8	9	83	5.8
Regional	48	28	12	6	4	88	6.1
<b>State</b>							
NSW/ACT	42	29	17	4	8	88	5.9
Victoria	41	25	15	8	10	81	5.7
Queensland	45	22	14	12	5	81	5.9
South Australia	41	26	14	13	4	81	5.9
Western Australia	50	23	15	4	6	88	6.1
Tasmania	42	27	19	7	5	88	5.9
Northern Territory	46	24	15	9	6	85	5.9

Table 6.5

<b>Perceived Federal Government Priorities - Lobby Oil Producing Countries to Produce More Oil</b>							
Q: How important on the '1' to '7' scale is it for the Federal Government to <i>lobby the oil producing countries to produce more oil?</i>							
OCTOBER 2000	Important			Mid-way	Unim- portant	Total Important	Mean
	7 %	6 %	5 %	4 %	1-3 %		
<b>TOTAL</b>	<b>23</b>	<b>15</b>	<b>19</b>	<b>18</b>	<b>23</b>	<b>57</b>	<b>4.7</b>
<b>Club Member</b>	23	13	18	18	25	54	4.7
<b>Location</b>							
Urban	20	14	19	20	25	53	4.6
Regional	31	16	20	12	19	67	5.1
<b>State</b>							
NSW/ACT	20	14	17	21	27	51	4.5
Victoria	22	12	22	18	25	56	4.6
Queensland	26	16	19	18	17	61	5.0
South Australia	22	19	22	17	14	63	5.0
Western Australia	28	15	18	14	24	61	4.9
Tasmania	23	21	15	10	29	59	4.7
Northern Territory	28	7	23	15	26	58	4.7

Table 6.6

<b>Perceived Federal Government Priorities - Maintain Petrol Tax to Keep Federal Budget in Surplus</b>							
<i>Q: How important on the '1' to '7' scale is it for the Federal Government to <b>maintain the current petrol tax system to keep the Federal budget in surplus?</b></i>							
<b>OCTOBER 2000</b>	Important			Mid-way	Unim- portant	Total Important	Mean
	7 %	6 %	5 %	4 %	1-3 %		
<b>TOTAL</b>	<b>12</b>	<b>12</b>	<b>20</b>	<b>23</b>	<b>29</b>	<b>44</b>	<b>4.2</b>
<b>Club Member</b>	12	13	20	23	29	45	4.2
<b>Location</b>							
Urban	13	12	18	25	29	43	4.2
Regional	11	12	25	18	30	48	4.2
<b>State</b>							
NSW/ACT	12	13	20	23	30	45	4.2
Victoria	12	10	23	23	29	45	4.2
Queensland	12	16	19	25	22	47	4.5
South Australia	11	12	10	29	30	33	4.1
Western Australia	16	7	19	18	37	42	4.1
Tasmania	13	12	27	18	22	52	4.5
Northern Territory	15	11	15	22	30	41	4.3

## 7. CONDITION OF ROADS

### A. Perceived Condition of Highways, Major Arterials and Local Roads

*The same motorists were asked to rate the three categories of roads in the same way in both September 1999 and October 2000 - ie 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 100% minus the small unsure minorities.*

		Excel- lent 7 %	Very Good 6 %	Good 5 %	Aver- age 4 %	Nega- tive 1-3 %	Total Positive 5-7 %	Trend
<ul style="list-style-type: none"> <li><b>Major highways</b> (between cities/towns)</li> </ul>	Sept 1999	7	27	35	18	10	69	
	Oct 2000	9	33	35	15	7	77	(+8%)
<ul style="list-style-type: none"> <li><b>Major arterials</b> (within cities/towns)</li> </ul>	Sept 1999	5	20	34	25	13	59	
	Oct 2000	5	25	38	21	10	68	(+9%)
<ul style="list-style-type: none"> <li><b>Local roads</b> (in your own area)</li> </ul>	Sept 1999	5	18	24	26	27	47	
	Oct 2000	4	15	31	28	22	50	(+3%)



### B. Mean Ratings of the Perceived Condition of Roads - Urban vs Regional

*Converting the 7 point scale ratings to "mean" ratings.*

		All Motorists	Urban Motorists	Regional Motorists	Trend
<ul style="list-style-type: none"> <li><b>Major highways</b> [mean ratings]</li> </ul>	Sept 1999	5.0	5.0	5.0	Up, mainly in urban
	Oct 2000	5.2	5.3	5.1	
<ul style="list-style-type: none"> <li><b>Major arterials</b> [mean ratings]</li> </ul>	Sept 1999	4.7	4.7	4.7	Up, mainly in urban
	Oct 2000	4.9	4.9	4.8	
<ul style="list-style-type: none"> <li><b>Local roads</b> [mean ratings]</li> </ul>	Sept 1999	4.3	4.4	3.9	Up in urban
	Oct 2000	4.4	4.6	3.8	

Table 7.1

<b>Perceived Condition of <u>Major Highways</u></b>							
Q: I'd now like to ask you to rate the <b>current condition</b> of various <b>roads</b> on the scale of '1' to '7'. '7' means excellent, '6' means very good, '5' good, '4' is average, '3' means not very good, '2' means bad and '1' means terrible. First, how would you rate <b>the current condition of major highways</b> (major highways between cities and towns and <u>not</u> within cities)?							
	Excell- ent 7 %	Very Good 6 %	Good 5 %	Aver- age 4 %	Neg- ative 1-3 %	Total Positive 5-7 %	Mean
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>7</b>	<b>27</b>	<b>35</b>	<b>18</b>	<b>10</b>	<b>69</b>	<b>5.0</b>
<b>Club Member</b>	7	26	36	18	10	69	5.0
<b>Location</b>							
Urban	7	27	35	18	10	69	5.0
Regional	8	25	36	20	8	69	5.0
<b>State</b>							
NSW/ACT	6	26	37	18	9	69	5.0
Victoria	11	32	33	15	8	76	5.2
Queensland	6	16	37	20	17	59	4.6
South Australia	7	30	34	16	9	71	5.0
Western Australia	6	29	30	26	6	65	5.0
Tasmania	12	29	35	15	9	76	5.2
Northern Territory	24	32	27	13	3	83	5.6
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>9</b>	<b>33</b>	<b>35</b>	<b>15</b>	<b>7</b>	<b>77</b>	<b>5.2</b>
<b>Club Member</b>	10	33	36	14	6	79	5.3
<b>Location</b>							
Urban	9	35	35	14	5	79	5.3
Regional	8	31	33	17	10	72	5.1
<b>State</b>							
NSW/ACT	10	36	34	14	6	80	5.3
Victoria	9	37	35	11	5	81	5.3
Queensland	11	25	33	19	10	69	5.0
South Australia	6	30	37	18	6	73	5.1
Western Australia	2	34	39	16	7	75	5.0
Tasmania	11	36	39	10	4	86	5.4
Northern Territory	15	36	26	15	6	77	5.4

Table 7.2

<b>Perceived Condition of <u>Major Arterial Roads</u></b>							
Q: On the scale of '1' to '7' where '7' means excellent and '1' means terrible, how would you rate <b>the current condition of major arterial roads</b> (major roads within cities and towns)?							
	Excell- ent 7 %	Very Good 6 %	Good 5 %	Aver- age 4 %	Neg- ative 1-3 %	Total Positive 5-7 %	Mean
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>5</b>	<b>20</b>	<b>34</b>	<b>25</b>	<b>13</b>	<b>59</b>	<b>4.7</b>
<b>Club Member</b>	6	19	34	26	13	59	4.7
<b>Location</b>							
Urban	5	21	35	25	13	61	4.7
Regional	6	19	32	25	14	57	4.7
<b>State</b>							
NSW/ACT	4	13	31	31	20	48	4.4
Victoria	8	30	31	19	9	69	5.1
Queensland	6	17	38	26	12	61	4.7
South Australia	2	22	42	23	9	66	4.8
Western Australia	3	29	38	19	9	70	4.9
Tasmania	8	18	39	25	10	65	4.8
Northern Territory	16	34	32	11	5	82	5.4
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>5</b>	<b>25</b>	<b>38</b>	<b>21</b>	<b>10</b>	<b>68</b>	<b>4.9</b>
<b>Club Member</b>	6	25	38	21	9	69	4.9
<b>Location</b>							
Urban	5	26	39	21	9	70	4.9
Regional	6	23	36	22	12	65	4.8
<b>State</b>							
NSW/ACT	4	21	37	24	14	62	4.7
Victoria	6	34	35	18	7	75	5.1
Queensland	6	21	43	21	9	70	4.9
South Australia	6	20	38	28	6	64	4.9
Western Australia	4	33	39	15	6	76	5.1
Tasmania	5	18	49	21	6	72	4.9
Northern Territory	11	28	39	16	5	78	5.2

Table 7.3

<b>Perceived Condition of <u>Local Roads</u></b>							
Q: On the scale of '1' to '7' where '7' means excellent and '1' means terrible, how would you rate <b>the current condition of roads in your local area?</b>							
	Excell-ent 7 %	Very Good 6 %	Good 5 %	Aver- age 4 %	Neg- ative 1-3 %	Total Positive 5-7 %	Mean
<b>SEPTEMBER 1999</b>							
<b>TOTAL</b>	<b>5</b>	<b>18</b>	<b>24</b>	<b>26</b>	<b>27</b>	<b>47</b>	<b>4.3</b>
<b>Club Member</b>	4	18	25	27	26	47	4.3
<b>Location</b>							
Urban	5	21	26	25	23	52	4.4
Regional	4	10	21	25	40	35	3.9
<b>State</b>							
NSW/ACT	4	14	21	26	35	39	3.9
Victoria	5	22	25	25	23	52	4.5
Queensland	4	16	26	26	28	46	4.3
South Australia	4	21	26	29	21	51	4.5
Western Australia	7	25	29	23	16	61	4.8
Tasmania	3	14	29	25	29	46	4.1
Northern Territory	15	26	37	14	8	78	5.2
<b>OCTOBER 2000</b>							
<b>TOTAL</b>	<b>4</b>	<b>15</b>	<b>31</b>	<b>28</b>	<b>22</b>	<b>50</b>	<b>4.4</b>
<b>Club Member</b>	4	16	33	26	21	53	4.5
<b>Location</b>							
Urban	5	17	34	26	18	56	4.6
Regional	2	8	22	32	36	32	3.8
<b>State</b>							
NSW/ACT	3	13	30	27	27	46	4.2
Victoria	4	18	31	28	19	53	4.5
Queensland	5	12	23	33	27	40	4.1
South Australia	3	16	38	23	19	57	4.5
Western Australia	7	18	41	24	11	66	4.8
Tasmania	4	12	30	28	25	46	4.3
Northern Territory	13	22	38	10	17	73	5.0

<b>APPENDIX</b>
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Appendix 1

<b>Age of Car Driven</b>				
<i>Q: How old is the car you normally drive?</i>				
<b>SEPTEMBER 1999</b>	<b>AGE OF CAR DRIVEN</b>			
	<b>0-5 Years %</b>	<b>6-10 Years %</b>	<b>Over 10 Years %</b>	<b>Mean</b>
<b>TOTAL</b>	<b>40</b>	<b>29</b>	<b>30</b>	<b>8.7</b>
<b>Club Member</b>	43	30	27	8.1
<b>Location</b>				
Urban	40	29	30	8.6
Regional	41	27	32	9.0
<b>State</b>				
NSW/ACT	45	29	26	7.9
Victoria	37	23	39	9.6
Queensland	38	35	26	8.7
South Australia	35	28	36	9.5
Western Australia	42	31	27	8.3
Tasmania	34	28	38	10.1
Northern Territory	40	29	31	9.0
<b>OCTOBER 2000</b>	<b>AGE OF CAR DRIVEN</b>			
	<b>0-5 Years %</b>	<b>6-10 Years %</b>	<b>Over 10 Years %</b>	<b>Mean</b>
<b>TOTAL</b>	<b>41</b>	<b>30</b>	<b>28</b>	<b>8.4</b>
<b>Club Member</b>	43	31	26	8.0
<b>Location</b>				
Urban	40	31	29	8.6
Regional	47	29	24	7.9
<b>State</b>				
NSW/ACT	46	31	22	7.4
Victoria	41	24	35	9.5
Queensland	39	32	29	8.8
South Australia	33	43	24	8.4
Western Australia	39	29	32	8.8
Tasmania	36	26	37	9.3
Northern Territory	50	35	15	7.5

<b>Who Pays for Petrol</b>				
<i>Q: Do you normally pay for petrol, or does your company pay for it?</i>				
	<b>SEPTEMBER 1999</b>		<b>OCTOBER 2000</b>	
	<b>Pay for Own Petrol %</b>	<b>Company Pays %</b>	<b>Pay for Own Petrol %</b>	<b>Company Pays %</b>
<b>TOTAL</b>	<b>93</b>	<b>7</b>	<b>93</b>	<b>7</b>
<b>Club Member</b>	94	6	94	6
<b>Location</b>				
Urban	93	7	94	6
Regional	93	7	90	10
<b>State</b>				
NSW/ACT	93	7	91	9
Victoria	92	8	91	9
Queensland	95	5	95	5
South Australia	93	7	96	4
Western Australia	96	4	97	3
Tasmania	93	7	94	6
Northern Territory	87	13	88	12

<b>Type of Fuel Used</b>					
<i>Q: What type of fuel do you use (in the car you drive)?</i>					
<b>OCTOBER 2000</b>	<b>Unleaded: Standard %</b>	<b>Unleaded: Premium %</b>	<b>Leaded: Super %</b>	<b>Diesel %</b>	<b>LPG %</b>
<b>TOTAL</b>	<b>65</b>	<b>9</b>	<b>17</b>	<b>5</b>	<b>4</b>
<b>Club Member</b>	67	9	16	5	3
<b>Location</b>					
Urban	65	10	17	4	4
Regional	65	5	17	9	4
<b>State</b>					
NSW/ACT	68	10	16	4	2
Victoria	56	11	22	2	9
Queensland	69	7	16	7	1
South Australia	73	4	13	5	5
Western Australia	70	4	12	11	3
Tasmania	59	11	23	6	1
Northern Territory	65	4	7	22	2

### Sample Composition

The 2000 survey consisted of **832** telephone re-interviews with motorists age 18 years and over. These motorists were first interviewed in September 1999 and make up half of the original 1623 motorists interviewed. Motorists were defined as regular drivers (that is, at least once a month). As mentioned in Section 1.2, the sample intentionally over-represented smaller states and territories, and was weighted at the analysis stage to obtain a representative national picture.

The **unweighted sample sizes** (ns) for each sub-group analysed in the detailed tables, as well as the **weighted sample sizes** for the 2000 survey, are shown below:

	SEPTEMBER 1999	OCTOBER 2000	
	Unweighted <i>n</i> =	Unweighted <i>n</i> =	Weighted <i>n</i> =
<b>Club Member</b>	1089	569	605
<b>Location</b>			
Urban	1135	584	613
Regional	488	248	219
<b>State</b>			
NSW/ACT	354	177	295
Victoria	350	181	209
Queensland	302	158	152
South Australia	160	86	67
Western Australia	200	99	81
Tasmania	151	79	21
Northern Territory	106	52	8
<b>Total sample</b>	<b>1623</b>	<b>832</b>	<b>832</b>