



Australian Automobile Association (AAA)

MOTORISTS' ATTITUDES 2005 ANOP National Survey

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For the:
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2005 National Survey of Motorists' Attitudes



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1.0 INTRODUCTION

This report provides an executive summary of the findings of the **February 2005 national survey of motorists' attitudes** conducted by ANOP Research Services for the Australian Automobile Association (AAA).

1.1 Background and Objectives

This is the eighth national survey of motorists' views undertaken by ANOP for the AAA over the past decade. Previous studies have been in 1995, 1996, 1997, 1999, 2000, 2003 and 2004.

This most recent study in February 2005 was designed to monitor motorists' agenda and to provide some early measures of the effectiveness of the SaferRoads Campaign. The results were presented to the joint conference held by the AAA, AiP and the FCAI in Canberra on 9 March 2005, entitled "Moving Australia '05".

The main issues investigated in the 2005 survey are as follows:

2005 Areas of Investigation

- 1. Motorists' Agenda.** Unprompted most important issues affecting car drivers. Importance of car. Reported car usage.
- 2. Petrol Issues.** Petrol price awareness. Use of supermarket docketts. Extent of "shopping around" for price. Attitudes to ethanol in petrol.
- 3. Causes & Prevention of Crashes.** Unprompted causes of crashes. Relative importance of key factors in cause & prevention of crashes.
- 4. Roads & Infrastructure Spending.** Are roads as good as they should be: roads in local area, highways, major arterials. Attitudes to toll roads. Attitudes to infrastructure spending.
- 5. New Cars & Advertising.** Concerns about new car ads. Attitudes to emphasis on speed in TV ads. Importance of club's advice when buying car.
- 6. Environmental Concerns.** Degree of concern about effect of cars on environment. Perceived solutions.

1.2 Research Methodology

The 2005 national survey of motorists consisted of 768 telephone interviews between 12-21 February 2005 (slightly exceeding the target of 750 interviews). Those interviewed were regular drivers aged 18 years and over who had participated in the July 2004 SaferRoads survey. This is the third time that ANOP's re-interview method has been used to track trends for the AAA.

In line with the 2004 sample composition, the 2005 survey provides a national perspective but, at the same time, recognises geographical differences. Smaller states and territories are over-represented to enable separate analysis of their results, although their results need to be interpreted with caution because of the smaller samples involved. Results are weighted back at the analysis stage, to obtain a representative national picture.

1.3 This Report

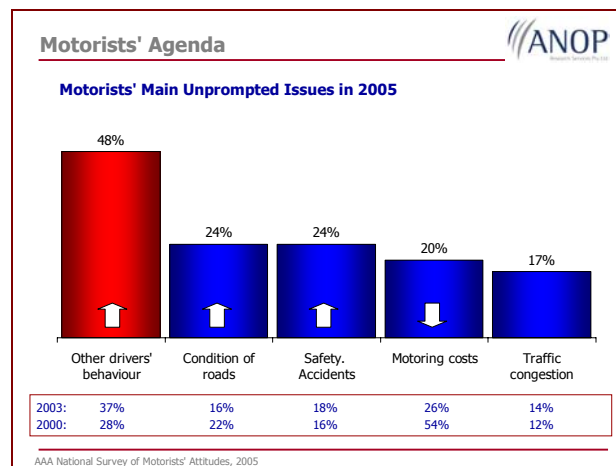
This report provides an overview of the main findings and conclusions of the February 2005 national survey. A more detailed analysis of the survey results is contained in a separate document entitled "Detailed Report on 2005 ANOP National Study".

2.0 OVERVIEW OF MAIN FINDINGS

The main findings of the February 2005 national survey are as follows:

- **Motorists' Agenda**

Motorists' unprompted identification of the main issues impacting on them as car drivers continues to provide a broader insight into trends in Australian society. As found in 2003, motorists' primary concern is the *behaviour and attitudes of other drivers* - especially their perceived aggression and impatience. This concern has risen significantly over the past five years, and is an indication of how social pressures are impacting on standards of courtesy on the road and resulting in a more impatient and selfish mindset among drivers.

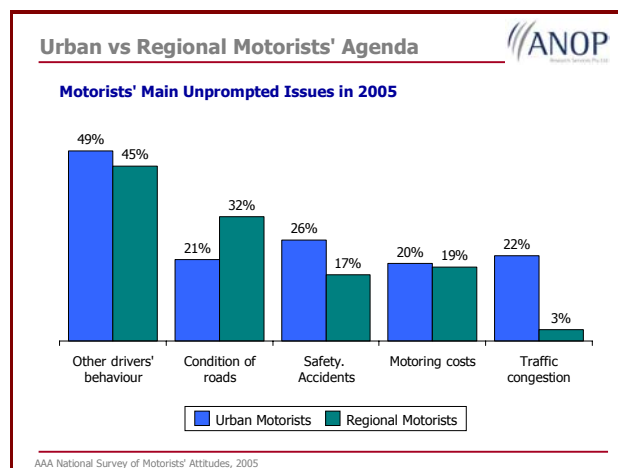


While motorists are increasingly displaying irritation with "other" drivers, they are also starting to focus more on the *condition and safety of roads* and on *safety and road accidents*. The increases in concern about these issues in 2005 are important as they show that the SaferRoads Campaign is beginning to strike a chord among motorists.

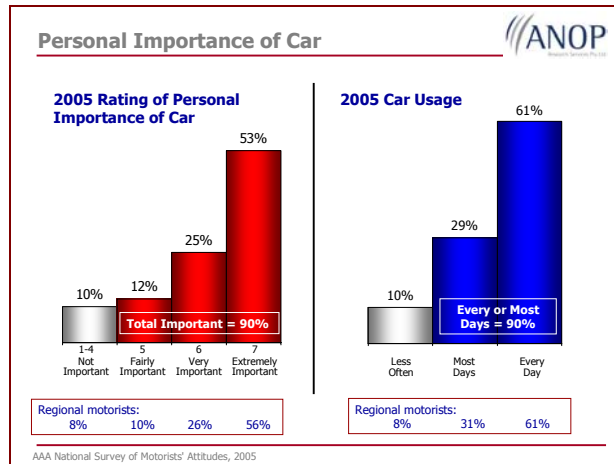
With concerns about "other" drivers' behaviour, roads and safety increasing, *motoring costs* has softened as an issue. Since the peak of petrol price consciousness in 2000, concern about motoring costs has been declining, despite the relatively high petrol prices at the time of the latest survey. The reason for this has been the dramatic increase in the use of the supermarket docket to help defray petrol costs.

While the marketing success of supermarket fuel discounts has readjusted motorists' price sensitivity, this does not mean that petrol prices will remain a benign issue. If household budgets start being squeezed by other increases (such as mortgage rate increases, inflation), higher petrol prices are less likely to be tolerated, especially if the supermarket discounts start being perceived as factored into the pump price.

Traffic congestion emerges as motorists' fifth main issue of concern, and continues to be largely an urban issue. The main differences in urban and regional motorists' agenda is a greater concern about roads in regional areas, and traffic congestion and safety in urban areas.

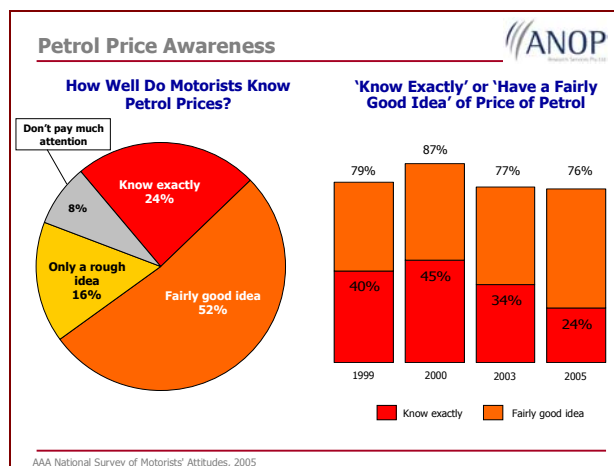


The 2005 survey continues to show the integral part that the car plays in meeting Australians' mobility needs, and the high level of importance that Australians attach to their cars. Nine in ten continue to rate their car as important and to drive every or most days, with slightly higher dependence on the car evident in regional areas.

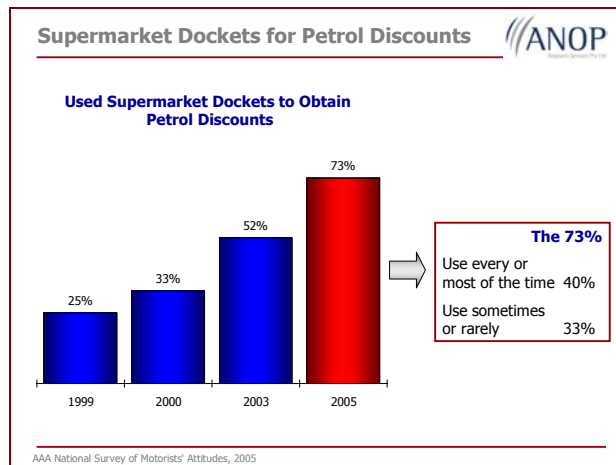


- Petrol Issues**

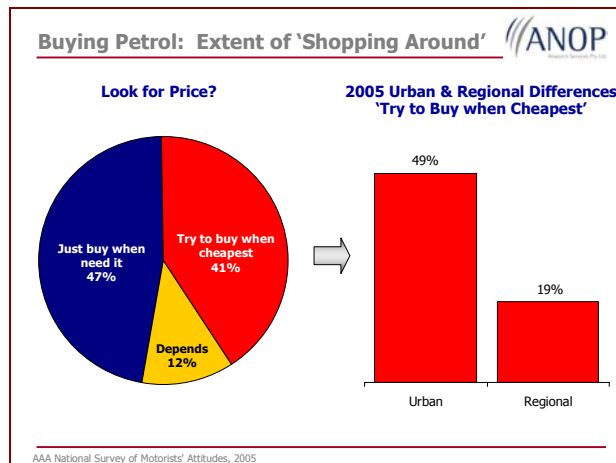
In 2005, three in four motorists continue to report that they have at least a fairly good idea of the current price of petrol. However, since the peak of petrol price consciousness in 2000, there has been a downward trend in the proportion keeping a close watch on petrol prices.



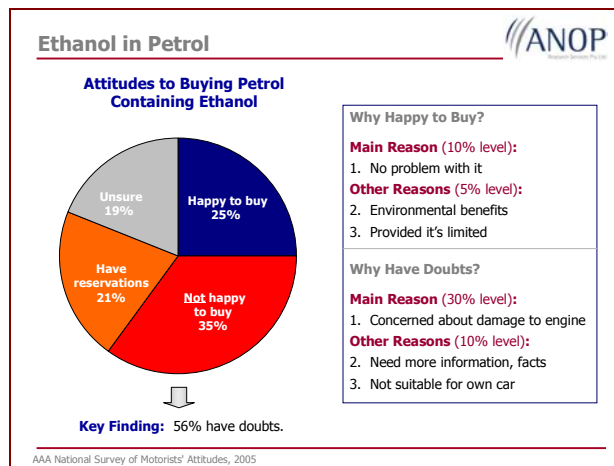
As mentioned, a key reason for the decline in motorists' petrol price sensitivity is the increased usage of supermarket fuel discounts. In the last six years, the use of docketts has rocketed from one in four to nearly three in four motorists. And those using the docketts every or most times they buy petrol has doubled in the last two years. This dramatic surge in docket use is further evidence of the ongoing popularity and marketing success of these discount schemes.



Motorists are also not "shopping around" as much for price in 2005, with around four in ten indicating they normally buy petrol when it is cheapest, rather than when they need it. In a clear indication of the limited choice of petrol outlets available to motorists in more remote areas, only two in ten regional motorists report "shopping around" for petrol prices.

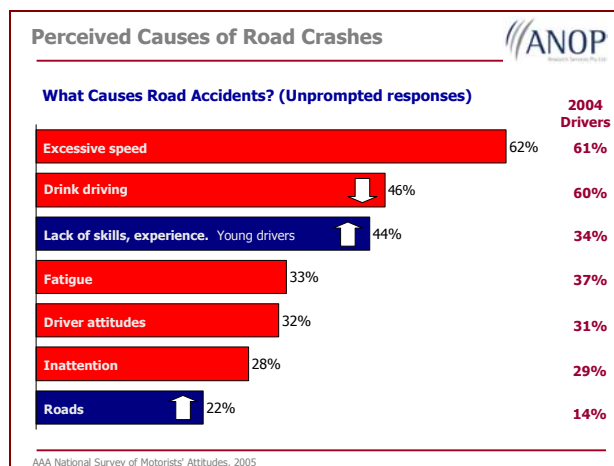


Ethanol in petrol continues to be a nebulous issue to the majority of motorists. Only one in four is currently happy to buy petrol containing ethanol, while nearly six in ten either reject it out of hand or have reservations about buying it - and a further two in ten are just undecided. As found previously, the main doubts motorists have about ethanol relate to concerns about potential damage and there is a distinct needs for more information. Substantial marketing will clearly be required to obtain community acceptance of ethanol in petrol.



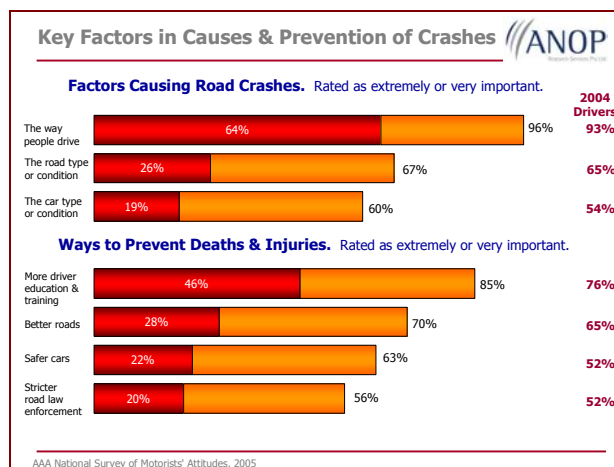
- **Causes & Prevention of Crashes**

Drivers continue to be the main culprit in the community's perceptions of the causes of crashes. Nearly all motorists surveyed spontaneously mention at least one aspect of driver misbehaviour when asked what causes crashes, clearly reflecting the messages conveyed by government road safety campaigns over many years.



Speed remains the primary spontaneously perceived cause of crashes, with *drink driving* and *lack of skills & inexperience* next on the list. References to *drink driving* have fallen, reflecting a cyclic low in drink driving "blitzes" at the time of the survey. In contrast to this decline, there has been a marked increase in the proportion of motorists nominating *lack of skills & inexperience* as a cause of road accidents – reflecting recent mainstream media coverage of young drivers and their apparent over-representation in accident statistics.

Fatigue, *driver attitudes* and *inattention* continue to be mentioned as causes of crashes further down the list, together with *roads*. However, mentions of *roads* have increased this survey in another indication that the voice of the SaferRoads Campaign is starting to be heard within the community.



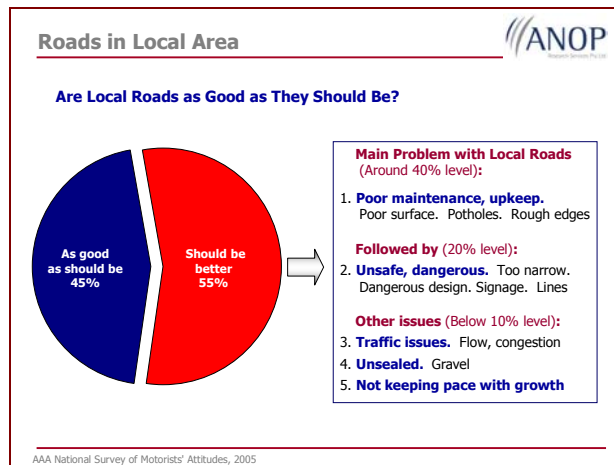
When prompted about causes of crashes and ways to prevent deaths and injuries, *the way people drive* not surprisingly continues to emerge as the most important cause of crashes, and there is a continuing strong call for *more driver education and training*. However, there is a more lukewarm reaction to *stricter road law enforcement* as a way of curbing driver behaviour.

In another encouraging result for the SaferRoads Campaign, the perceived importance of *better roads* and *safer cars* in reducing deaths and injuries has risen,

as has the perceived importance of roads and cars as factors contributing to crashes.

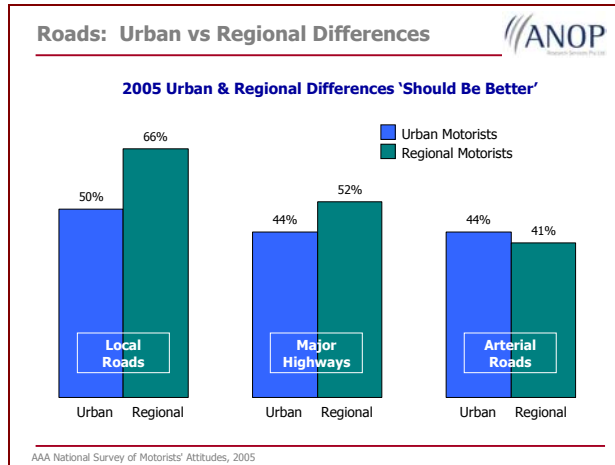
- **Roads & Infrastructure Spending**

When motorists are asked whether roads are as good as they should be, a different pattern of responses emerges for different roads. *Roads in their local area* are the roads that motorists drive on most frequently, and they receive the least favourable assessment. Just under six in ten say that roads in their local area are not good enough - rising to nearly seven in ten in regional areas. Even though local roads will vary in different locations, the main problem cited in most cases is poor upkeep and surfacing, followed by concerns about road design and safety aspects.

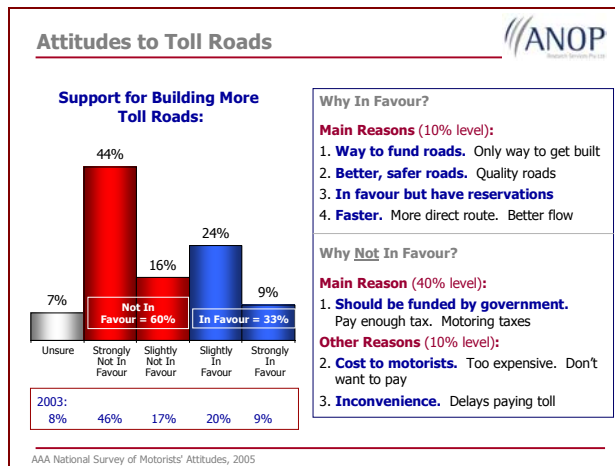


Nearly five in ten motorists say *major highways* "should be better" with the main concerns about highways being the perceived need for more lanes, poor maintenance, followed by a call for more divided highways. *Major arterial roads* are perceived to be falling short by just over four in ten, with similar perceived problems such as poor maintenance and the need for more lanes, as well as traffic congestion.

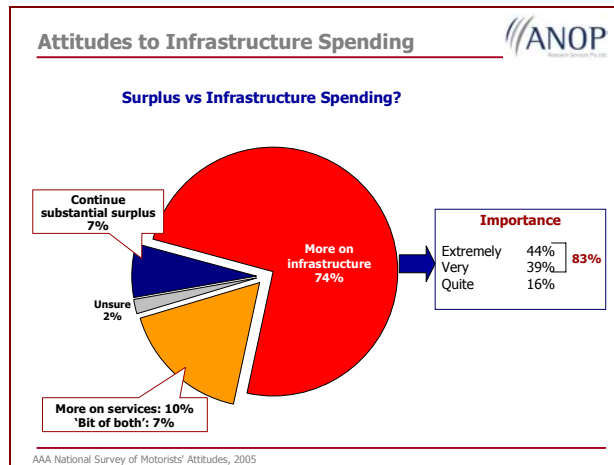
Motorists in regional areas are considerably less happy with their local roads and also with highways, whereas arterial roads are marginally more of an issue in urban areas (as shown overleaf).



As found two years ago, six in ten motorists are opposed to more toll roads being built - with over four in ten strongly against it. The majority of opposition continues to stem from the belief that the community is already paying sufficient taxes to build roads, and because of the out-of-pocket costs to motorists.

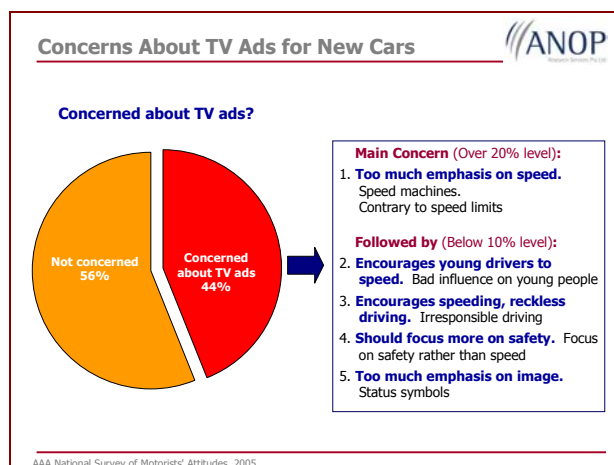


Motorists' attitudes to toll roads clearly show their reluctance to pay for new or better roads and reveal their belief that governments rather than motorists should pay. In line with this - and reflecting their belief that many roads should be better - nearly three in four motorists believe that the Federal government should be spending more on infrastructure (like roads and transport improvements) rather than maintaining the current substantial surplus. These results are a clear indication of the potential to engage the community in the infrastructure debate.

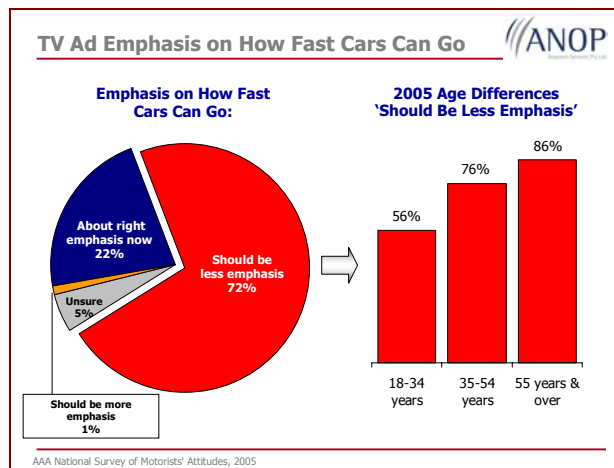


- **New Cars & Advertising**

ANOP's 2004 SaferRoads survey found that motorists' awareness and understanding of advances in car safety had increased significantly, and the 2005 survey shows that the perceived importance of safer cars in preventing deaths and injuries has also increased. It comes as no surprise then, to find that many motorists do not want "unsafe" cars or driving practices portrayed in new car advertising. The 2005 survey reveals that nearly one in two motorists have concerns about new car advertising, with the great majority of the concerns relating to the perceived emphasis on speed and encouragement of speeding, particularly among young people. Thus, these concerns also tap into motorists' strong belief that speed is a primary cause of crashes.

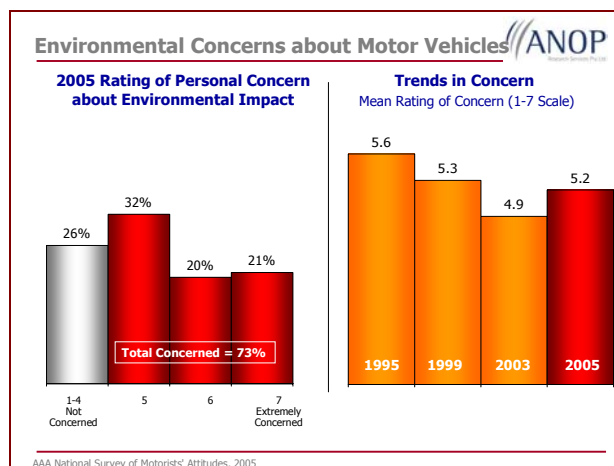


Motorists were also specifically asked whether the emphasis in TV ads on how fast cars can go is appropriate. The results clearly show where the majority of the community stands on this issue: seven in ten motorists feel that there "should be less emphasis", with only two in ten saying the emphasis is "about right now". Attitudes are clearly related to age, with older motorists considerably more concerned about this issue than younger motorists.



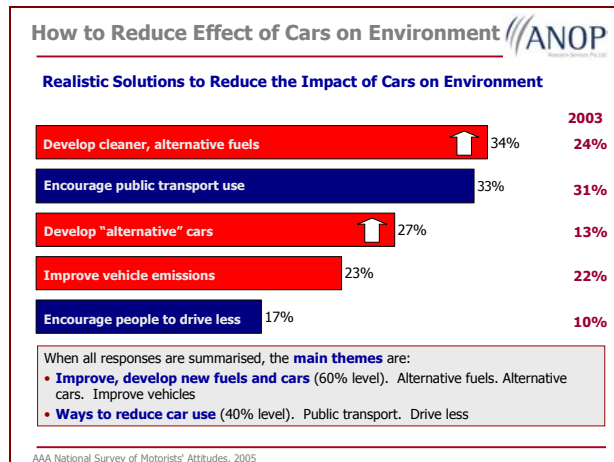
- **Environmental Concerns**

For the first time in ANOP's surveys for the AAA, motorists' concern about the car's environmental impact has increased rather than fallen.



The present mean rating of concern stands at 5.2 on a seven-point scale, after falling from 5.6 in 1995 to 5.3 in 1999 and just 4.9 in 2003. Although this result shows the environmental impact of cars is still an issue of only moderate concern to motorists, it suggests that the community mood is changing and environmental consciousness is on the rise again.

When motorists are asked to nominate, unprompted, their "realistic" solutions for reducing the impact that cars have on the environment, it is clear that the community's faith remains in new fuels and new types of cars - rather than in solutions that reduce car usage such as better public transport or encouraging people to drive less.



There has been a significant increase in the number of motorists nominating the development of *cleaner, alternative fuels* and *alternative cars* as possible solutions to reducing cars' environmental impact. Thus, the Australian community's desire for different sorts of cars driven by different sorts of fuels and technologies, is increasing as its environmental consciousness is rekindled.

- **Summary Tables**

The results of the February 2005 national survey of motorists are encapsulated in the following fifteen summary tables.

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1. 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.

THE TOP ISSUE:	2005 TOTAL %	2005 Urban %	2005 Regional %
1. Other drivers' behaviour. Aggressive, impatient (26%). Way other people drive (13%). Lack of skills, training (11%). 'Stereotypes' - young, old drivers (5%).	48	49	45
FOLLOWED BY:			
2. Condition of roads. Poor conditions (15%). Narrow, dangerous (10%).	24	21	32
3. Safety. Road accidents. Road safety (10%). Speeding (9%). Drink driving (3%). Unsafe cars (3%).	24	26	17
4. Motoring costs. Petrol prices (16%). Cost of rego, insurance (3%). Car running costs (3%). Expensive generally (2%). Cost of buying car (1%).	20	20	19
5. Traffic congestion. Traffic jams, delays. Amount of traffic	17	22	3
- Main responses to open-ended question -			

Comparison over Time

5 Main Themes:	1999 %	2000 %	2003 %	2005 %
Other drivers' behaviour	32	28	37	48
Condition of roads	19	22	16	24
Safety. Road accidents	14	16	18	24
Motoring costs	32	54	26	20
Traffic congestion	14	12	14	17

2. Mobility and the Car

Degree of Personal Importance Attached to the Car				
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.				
Rating of importance:	2005 TOTAL %	2005 Urban %	2005 Regional %	
7 Extremely important	53	53	56	
6 Very important	25	24	26	
5 Fairly important	12	12	10	
4 Midway	4	5	2	
1-3 Unimportant	6	6	6	
Total important	90	89	92	
Mean rating	6.1	6.1	6.2	

Reported Car Usage				
Motorists were asked how many days a week they drive.				
How often drive:	2005 TOTAL %	2005 Urban %	2005 Regional %	
Every day	61	61	61	
Most days	29	29	31	
Less often	10	10	8	
Every or most days	90	90	92	

Comparison over Time					
	1995	1999	2000	2003	2005
• Mean importance rating of car	6.2	6.2	n/a	6.3	6.1
• Drive every or most days	83%	91%	87%	92%	90%

3. Petrol Prices: Awareness & Behaviour

How Well Do Motorists Know Petrol Prices?

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

Knowledge of petrol prices:	2005	2005	
	TOTAL %	Urban %	Regional %
Close eye ... know exactly	24	24	25
Fairly good idea	52	54	48
Only a rough idea	16	14	19
Don't pay much attention	8	8	8

Comparison over Time

	1999 %	2000 %	2003 %	2005 %
Close eye... know exactly	40	45	34	24
Fairly good idea	39	42	43	52
At least a fairly good idea	79	87	77	76

Use of Supermarket Dockets for Discounted Petrol

Motorists were asked if they have ever used supermarket docketts to obtain discounts on petrol - and if so, how often they use these docketts.

Use of supermarket docketts:	2005	2005	
	TOTAL %	Urban %	Regional %
Never used to obtain discounts	27	26	32
Have used to obtain discounts	73	74	68
How often?	∇	∇	∇
Almost every (23%)/most of time (17%)	40	40	39
Sometimes (20%)/rarely (13%)	33	34	29

Comparison over Time

	1999 %	2000 %	2003 %	2005 %
Used docketts to obtain discounts	25	33	52	73
			∇	∇
Almost every/ most of time	Not asked		19	40
Sometimes/ rarely			33	33

4. Other Petrol Issues

Extent of "Shopping Around" for Price

Motorists were asked whether they normally buy petrol when it's cheapest or just when they need it.

Look for price?	2005	2005		COMPARE 2003 TOTAL %
	TOTAL %	Urban %	Regional %	
Try to buy when cheapest	41	49	19	47
Just buy when need it	47	39	68	44
Varies. Depends	12	12	13	9

Attitudes to Buying Petrol Containing Ethanol

Motorists were asked whether they are happy to buy petrol with ethanol in it or not. They were then asked their reasons in an open-ended question.

Petrol with ethanol:	2005	2005		COMPARE 2003 TOTAL %
	TOTAL %	Urban %	Regional %	
Happy to buy	25	22	31	22
Not happy to buy	35	37	30	44
Have reservations	21	21	22	19
Unsure	19	20	17	15
Total not happy/have reservations	56	58	52	63

Main Reasons for Attitudes to Ethanol in Petrol

Why happy to buy:	2005	COMPARE 2003 TOTAL
	The 25%	
	∇	∇
1. No problem with it. Makes no difference	13	13
2. Environmental benefits. Renewable source	5	3
3. Provided it's limited. If it doesn't affect car	4	5
Why have doubts:	The 56%	The 63%
	∇	∇
1. Concerned about damage to engine. Unsafe	28	35
2. Don't know enough. Need more information, facts	13	14
3. Concerned about performance. Not suitable for my car	5	4

- Main responses to open-ended question -

5. Road Accidents and Crashes

Perceived Causes of Road Accidents and Crashes

Respondents were asked to nominate, in an open-ended question, the single biggest cause, and two other important causes, of road accidents and crashes. Table ordered on top 3 perceived causes.

	2005 TOP CAUSE %	2005 TOP 3 CAUSES %	2005 TOP 3 CAUSES		COMPARE 2004 DRIVERS %
			Urban %	Regional %	
THE MAIN MENTION:					
1. Excessive speed. Speeding. Driving too fast	35	62	64	56	61
FOLLOWED BY:					
2. Drink driving. Alcohol. Drunk	6	46	47	42	60
3. Lack of skills. Inexperience. Don't know road rules. Not driving to road conditions	14	35	36	34	29
4. Fatigue. Driving too long. Tired. Fall asleep	10	33	29	46	37
5. Poor driver attitudes. Impatient. Reckless. Inconsiderate. Aggressive	13	32	36	23	31
6. Lack of concentration. Not paying attention. Distractions.	14	28	28	30	29
7. Poor roads. Poor condition, surface. Unsafe roads	2	22	22	23	14
THEN:					
8. Drug use. Drug abuse. Prescribed & illicit drugs.	*	11	12	10	18
9. Young drivers. Lack of skill. Inexperience. Drive with less caution.	2	10	10	9	7
10. Driving conditions. Wet roads. Bad weather	*	6	6	4	7
11. Vehicle design	*	6	5	8	5
- Main responses to open-ended question -					

SUMMARY:					
• Lack of skills, inexperience. Driver skills. Young drivers	16	44	44	42	34
• All mentions of driver behaviour	96	99	100	98	100

* Indicates less than ½%

6. Key Factors in Causes & Prevention of Crashes

Perceived Importance of Factors Causing Road Crashes

Respondents were asked to rate three broad areas in terms of their importance as factors in causing road accidents and crashes.

Causes of road crashes:	Extremely Important %	Very Important %	Quite Important %	Not Too Important %
• The way people drive	64	32	4	*
• The type or condition of road	26	41	24	9
• The type or condition of the car	19	41	29	11

* Indicates less than ½%

Extremely & Very Important Ratings of Causes of Crashes

Causes of road crashes:		2005 TOTAL %	2005		COMPARE 2004 DRIVERS %
			Urban %	Regional %	
• The way people drive	- Extremely/Very	96	95	96	93
• The road type or condition	- Extremely/Very	67	67	67	65
• The car type or condition	- Extremely/Very	60	60	59	54

Perceived Importance of Ways to Prevent Deaths and Injuries

Respondents were asked to rate the importance of four broad ways of preventing road deaths and injuries.

Prevention of deaths & injuries:	Extremely Important %	Very Important %	Quite Important %	Not Too Important %
• More driver education & training	46	39	12	3
• Better roads	28	42	23	7
• Safer cars	22	41	28	9
• Stricter road law enforcement	20	36	31	13

Extremely & Very Important Ratings of Preventing Deaths & Injuries

Prevention of deaths & injuries:		2005 TOTAL %	2005		COMPARE 2004 DRIVERS %
			Urban %	Regional %	
• Driver education	- Extremely/Very	85	84	88	76
• Better roads	- Extremely/Very	70	69	72	65
• Safer cars	- Extremely/Very	63	63	62	52
• Stricter enforcement	- Extremely/Very	56	56	56	52

7. Attitudes to Local Roads

Are Roads in Local Area As Good As They Should Be?				
Motorists were asked whether the roads in their local area are as good as they should be or whether they should be better. If 'should be better', they were asked to nominate the main problems, in an open-ended question. %s overadd because some gave more than one answer.				
Roads in local area:	2005 TOTAL %	2005 Urban %	2005 Regional %	COMPARE 2003 TOTAL %
Are as good as they should be	45	50	33	41
Should be better	55	50	66	59
	▽	▽	▽	▽
<ul style="list-style-type: none"> • Poor maintenance, upkeep. Poor surface (27%). Potholes (24%). Rough edges (7%) 	41	37	52	45
<ul style="list-style-type: none"> • Unsafe, dangerous. Too narrow (11%). Dangerous design (7%). Signage (4%). Poor lines (2%) 	20	18	27	18
<ul style="list-style-type: none"> • Traffic issues. Traffic flow (4%). Congestion (3%) 	6	7	3	9
<ul style="list-style-type: none"> • Unsealed. Gravel 	5	5	7	7
<ul style="list-style-type: none"> • Not keeping pace with growth 	5	5	5	4
- Main responses to open-ended question -				

Perceptions of Roads in Local Area - By State								
	2005 TOTAL %	NSW/ ACT %	VIC %	QLD %	SA %	WA %	TAS ⁺ %	NT ⁺ %
Good as should be	45	40	48	42	47	62	36	57
Should be better	55	60	52	56	53	38	62	43

⁺Caution: small samples

8. Attitudes to Major Highways

Are Major Highways As Good As They Should Be?			
<p>Motorists were asked whether major highways <i>between</i> cities and towns are as good as they should be or whether they should be better. If 'should be better', they were asked to nominate the main problems, in an open-ended question. %s overadd because some gave more than one answer.</p>			
	2005 TOTAL %	2005 Urban %	2005 Regional %
Major highways:			
Are as good as they should be	49	51	45
Should be better	46	44	52
	▽	▽	▽
THE TOP ISSUE:			
1. Need more lanes. Too narrow. Not enough overtaking lanes	20	18	24
2. Poor maintenance. Potholes. Poor surface, edges	17	17	17
FOLLOWED BY:			
3. Need more divided highways. Dual carriageways	8	9	4
4. Poor road design. Bends, camber, drainage, obstacles	4	3	8
5. Traffic, congestion. Bottlenecks, traffic jams	3	3	4
6. Inadequate signage. Need more signs	3	3	2
<p>Others at 2% & below: . General need of upgrading . Inappropriate speed limits . Trucks and heavy vehicles . Traffic flow problems . Drivers on the road . Inadequate lighting . Poor planning . Not keeping pace with growth . Need to improve entry & exits to highways . Inadequate road markings . Insufficient police</p>			
- Main responses to open-ended question -			

Perceptions of Major Highways - By State								
	2005 TOTAL L %	NSW/ ACT	VIC	QLD	SA	WA	TAS⁺	NT⁺
	%	%	%	%	%	%	%	%
Good as should be	49	47	54	43	46	56	58	51
Should be better	46	48	41	54	44	41	41	44

⁺Caution: small samples

9. Attitudes to Major Arterial Roads

Are Major Arterial Roads As Good As They Should Be?

Motorists were asked whether major arterial roads (major roads *within* cities and towns) are as good as they should be or whether they should be better. If 'should be better', they were asked to nominate the main problems, in an open-ended question. %s overadd because some gave more than one answer.

Major arterial roads:	2005 TOTAL %	2005 Urban %	2005 Regional %
Are as good as they should be	52	51	55
Should be better	43	44	41
	▽	▽	▽
THE TOP ISSUES:			
1. Poor maintenance. Potholes. Uneven surfaces. Poor upkeep	15	14	18
2. Need more lanes. Too narrow to cope with traffic	10	10	12
3. Traffic, congestion. Traffic jams. Too much traffic	9	11	5
FOLLOWED BY:			
4. Inadequate signage. Not enough. Unclear	4	5	2
5. Poor planning	4	4	3
6. Traffic flow restrictions. Bad lights, intersections, roundabouts	4	3	4
7. Poor road design. Bends, camber, drainage	3	3	5
Others at 2% & below: . Not keeping pace with growth . Need more freeways . Inappropriate speed limits . Inadequate road markings . Need to improve entry & exits to arterials . General need of upgrading . Poor lighting . Trucks and heavy vehicles . Drivers on the road			
- Main responses to open-ended question -			

Perceptions of Major Arterial Roads - By State

	2005 TOTAL L %	NSW/ ACT	VIC	QLD	SA	WA	TAS ⁺	NT ⁺
	%	%	%	%	%	%	%	%
Good as should be	52	50	52	49	44	68	62	67
Should be better	43	44	42	46	55	32	31	28

⁺Caution: small samples

10. Attitudes to Toll Roads

Support for More Toll Roads					
Motorists were asked whether or not they are in favour of building more roads where motorists pay a toll. They were asked their reasons, in an open-ended question.					
	2005 TOTAL	Sydney, Melbourne, Brisbane	Rest of NSW, ACT, VIC, QLD	Other States	COMPARE 2003 TOTAL
	%	%	%	%	%
Building more toll roads:					
In favour - strongly	9	11	10	5	9
In favour - slightly	24	26	28	13	20
Not in favour - slightly	16	18	18	11	17
Not in favour - strongly	44	40	37	64	46
Unsure	7	5	7	7	8
Total in favour	33	37	38	18	29
Total not in favour	60	58	55	75	63

Reasons for Attitudes to Toll Roads		
	2005	COMPARE 2003 TOTAL
Why in favour:	The 33%	The 29%
	▽	▽
1. Way to fund roads. Only way to get it built	13	11
2. Better, safer roads. Quality roads	10	9
3. In favour but have reservations	7	9
4. Faster. More direct route. Better flow	7	2
Why <u>not</u> in favour:	The 60%	The 63%
	▽	▽
1. Should be funded by government: Pay enough tax (28%). Motoring taxes (17%)	40	34
2. Cost to motorists. Too expensive. Don't want to pay	11	22
3. Inconvenience. Delays paying toll	4	4
- Main responses to open-ended question -		

11. Attitudes to Infrastructure Spending

Government Surplus vs Spending More on Infrastructure			
Motorists were asked whether they think the Federal Government should continue to have a substantial surplus, or whether it should be spending more on infrastructure like roads and transport improvements. They were asked their reasons, in an open-ended question.			
Surplus vs Infrastructure Spending:	2005 TOTAL %	2005 Urban %	2005 Regional %
Continue to have substantial surplus	7	7	7
Spend more on infrastructure	74	74	74
Others responses: More on services (10%), Bit of both (5%), Other (2%)	17	17	16
Unsure	2	2	3

Support for Spending More on Infrastructure			
The 74% who want more spent on infrastructure like roads and transport improvements were asked to rate the importance of the Federal Government doing this.			
Importance of Infrastructure:	2005 TOTAL %	2005 Urban %	2005 Regional %
Extremely important	44	43	46
Very important	39	38	41
Quite important	16	18	13
Not too important	1	1	*
Extremely/very important	83	81	87
Based on those wanting more spending on infrastructure.			

12. Cars and TV Advertising

Concerns about Way New Cars Are Advertised on TV

Motorists were asked whether or not they have concerns about the way new cars are advertised on TV, and if so, what their concerns are.

	2005	2005	
	TOTAL	Urban	Regional
Way new cars are advertised:	%	%	%
No, not concerned about new car ads	56	57	52
Concerned about ads for new cars	44	43	48
	▽	▽	▽
THE TOP ISSUE:			
1. Too much emphasis on speed. Speed machines. Contrary to speed limits	26	26	24
FOLLOWED BY:			
2. Encourages young drivers to speed. Bad influence on young people	9	8	13
3. Encourages speeding, reckless driving. Irresponsible driving	6	5	9
4. Should focus more on safety. Focus on safety rather than speed	5	5	5
5. Too much emphasis on image. Status symbols	3	4	1
Others at 2% & below: . Unrealistic scenarios in 4WD advertising . Overuse of sex in car ads . Misleading . Should have different focus . Should focus on vehicle economy			
- Main responses to open-ended question -			

SUMMARY:	%	%	%
Total references to speed, reckless driving	38	37	42

TV Ad Emphasis on How Fast Cars Can Go

Motorists were asked whether they think there should be more or less emphasis in TV ads on how fast cars can go.

	2005	2005	
	TOTAL	Urban	Regional
Emphasis on how fast cars can go:	%	%	%
Should be less emphasis	72	71	76
About right emphasis now	22	24	17
Should be more emphasis	1	1	2
Unsure	5	4	5

13. Motoring Club Information about Car Purchases

Membership of Motoring Clubs

- 7 in 10 motorists indicated that they are a member of their state's motoring club.

Perceived Importance of Club's Advice When Buying a Car

Members were asked to rate the importance of motoring clubs' information or advice when buying a car.

Importance of Club's Advice:	2005	2005		CLUB
	TOTAL	Urban	Regional	MEMBERS
	%	%	%	%
Extremely important	17	18	14	17
Very important	30	31	28	33
Quite important	23	22	24	24
Not too important	29	28	33	25
Unsure	1	*	1	1
Extremely/very important	47	49	42	50

* Indicates less than 1/2%

14. Environmental Concerns

Degree of Personal Concern about Effect of Motor Vehicles on the Environment

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 not concerned at all.

Rating of personal concern:	2005 TOTAL %	2005		COMPARE 2003 TOTAL %
		Urban %	Regional %	
7	21	22	18	19
6	20	20	19	18
5	32	32	34	27
4	15	15	15	22
1-3	11	10	13	14
Total concerned		73	71	64
Mean rating	5.2	5.2	5.0	4.9

Comparison over Time

	1995	1999	2003	2005
Mean rating of concern	5.6	5.3	4.9	5.2

15. Environmental Solutions

Perceived Solutions to Reducing Environmental Impact of Cars				
Motorists were asked to nominate, in an open-ended question, realistic solutions for reducing the impact that cars have on the environment.				
THE MAIN SUGGESTIONS:	2005 TOTAL %	Urban %	2005 Regional %	COMPARE 2003 TOTAL %
1. Develop cleaner, alternative fuels. Better fuels. Gas. LPG	34	35	31	24
2. Encourage public transport use. More reliable, cheaper public transport	33	35	28	31
3. Develop "alternative" cars. Electric cars. Solar cars. Hydrogen cars	27	26	28	13
4. Improve vehicle emissions. Emission controls. Cleaner engines	23	22	26	22
FOLLOWED BY:				
5. Encourage people to drive less	17	15	21	10
6. Reduce old cars on road	6	7	3	5
7. Restrict number of cars on road	4	4	6	7
Others: . Use of ethanol (3%) . Improve roads (3%)				
Unsure	10	10	11	16
- Main responses to open-ended question -				

SUMMARY:	%	%	%	%
• Improve, develop new fuels & cars. Alternative fuels. Alternative cars. Improve vehicles	63	64	63	50
• Ways to reduce car use. Encourage public transport. Drive less. Restrict number of cars	43	42	44	40