Private Motorist Survey 2004

This report presents the findings of a survey conducted among private motorists across Great Britain. The research was carried out by MORI for the DVO group whose members are DVLA, DSA, VOSA and VCA. The main objective of the survey was to measure customer satisfaction with key services provided by the DVO Group agencies, tracking changes since 2003.

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Private Motorist Survey 2004
Full Results

Final Report

January 2005

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Introduction

Introduction

- This report presents the findings of a survey conducted among 1,044 private motorists across Great Britain. The research was carried out by MORI (Market & Opinion Research International) on behalf of the Driver, Vehicle & Operator (DVO) Group.

- The results are shown in PowerPoint slides, with accompanying text below where relevant.

- As the DVO Group has engaged MORI to undertake an objective programme of research, it is important to protect the interests of both organisations by ensuring that it is accurately reflected in any press release or publication of findings. As part of our standard terms and conditions of contract, the publication of the findings of this research is therefore subject to advance approval of MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

Background

Research Objectives

- The survey aims to build on the results of last year's survey (reported in September 2003) that provided a comprehensive overview of private motorists' satisfaction with and attitude towards the services provided by the DVO Group.

- The objectives of this year's survey were to:
  - Measure customer satisfaction with key services provided by the DVO Agencies, tracking changes since 2003
  - Identify the key drivers of satisfaction for private motorists and measure Agency performance on these
  - Identify areas for improvement across the range of services
  - Understand private motorists' attitudes towards and the impact of DVO Group services/initiatives on road safety, vehicle and driver crime, and the environment
  - Measure awareness of major new initiatives
  - Test reactions to new service propositions

Methodology - 1

- The survey was conducted face-to-face in-home using paper questionnaires and took an average of 45 minutes to complete.
- Fieldwork was conducted between 18th September and 15th November 2004.
- A sample of 175 and 80 reserve Census Output Areas (OAs) from across Great Britain provided eligible lists of addresses which interviewers could use to secure interviews. A total of six interviews were required per OA. More details on the sampling approach are provided in the Appendix.
- Quotas were set on gender, age and working status.

  Gender: Male = 55%, Female = 45%

  Age: 17-34 = 22.3%, 35-54 = 42.4%, 55+ = 35.3%

  Working status: Work full time = 44%, Not working full time = 56%
- A total of 1,044 face-to-face interviews with private motorists were completed, including 967 car drivers, 42 light van drivers and 35 motorcyclists.

Methodology - 2

- At the end of fieldwork, the results were weighted according to information obtained about the profile of private motorists in Great Britain. The data is consequently representative of private motorists in Great Britain.

- Please note all figures are expressed in percentage terms. When they do not sum exactly to 100%, this will be due to computer rounding or multiple response answers. An asterisk (*) denotes a figure less than 0.5% but greater than zero.

- Details on the statistical reliability of the results are provided in the Appendix. As a guide, a percentage difference of <u>more than five percentage points</u> is needed for a finding based on all respondents (2004: 1,044 private motorists; 2003: 816 drivers) to be significantly different between 2003 and 2004

Comparisons with Other Studies

- Where applicable, comparisons have been shown with other studies:

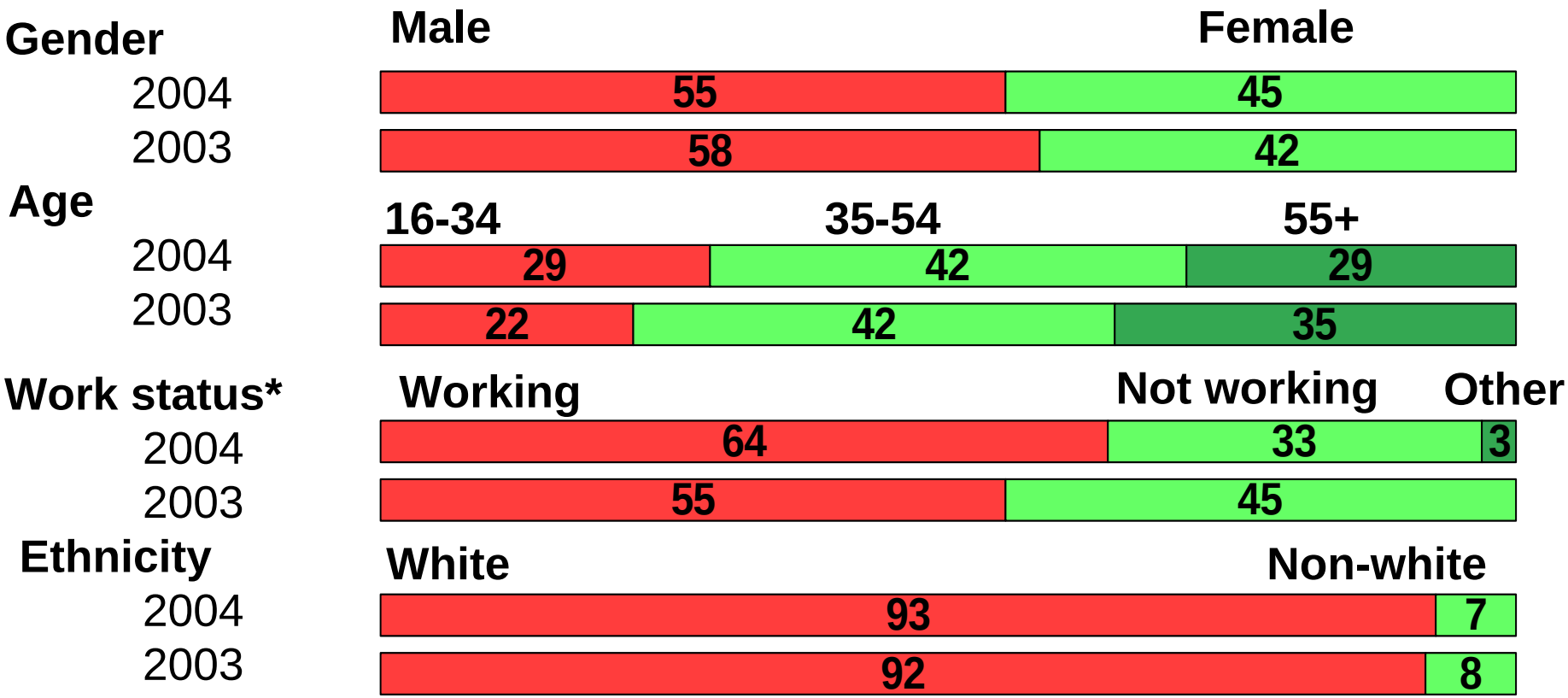
  - 2003 Private Motorist Survey based on all car/light van drivers (816). Interviews were conducted face-to-face in-home between 3 July - 21 August 2003.

  - 2003 MOT Customer Survey based on 1,012 interviews with motorists who had taken a vehicle for an MOT Test in the last 12 months. Interviews were conducted face-to-face in-home between 11th August and 24th September 2003.

  - 2004 Operators Survey based on 700 interviews conducted by telephone with HGV and PSV operators, conducted between 19th and 30th July 2004.

- However, it should be borne in mind that at times the results of these surveys are not directly comparable with the results of the 2004 Private Motorist Survey due to alterations in question wording and the differences in the profile of the samples. This is particularly true when comparing levels of satisfaction with the MOT Test from this year's survey and the 2003 MOT Customer Survey.

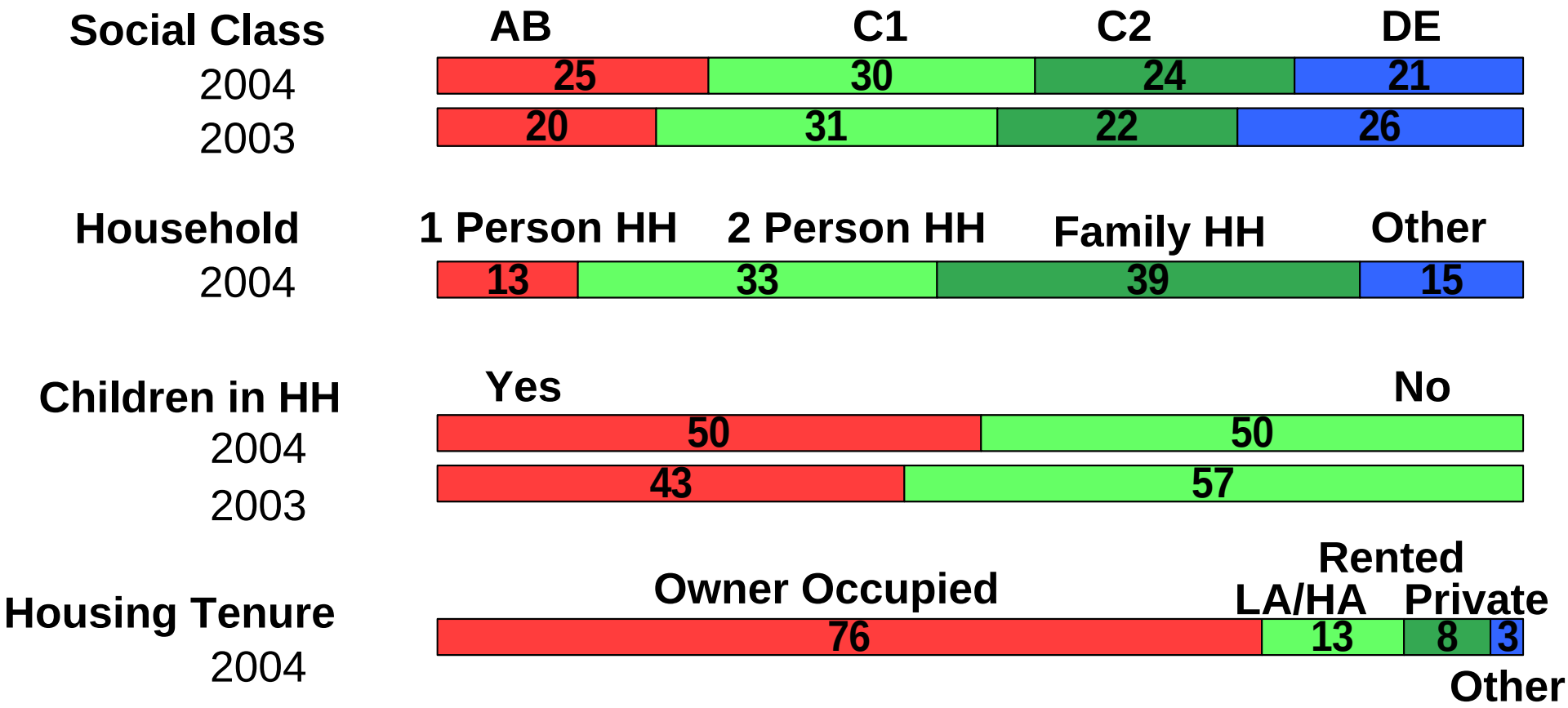
Profile of Private Motorists - 1



Base: All (1,044), 2004; All Drivers (816), 2003

* ‘Working’ includes full-time and part-time workers; ‘Not working’ includes retired people, unemployed, those looking after home/children, disabled people and students; ‘Other’ includes self-employed and those who did not specify or refused to give an activity

Profile of Private Motorists - 2



Base: All (1,044), 2004; All Drivers (816), 2003

Executive Summary

Executive Summary - 1

- Familiarity is up on 2003 for all government agencies asked about but this is not matched with improvements in favourability for all (e.g. DVLA).
- A decline in favourability towards the Post Office, a key intermediary for the DVO Group, may explain falls in satisfaction with certain aspects of motoring e.g. applying for road tax.
- This year sees an increase in satisfaction with government agencies that deal with motoring. Agencies are viewed as more efficient, easier to contact and better at keeping things simple than in 2003.
- The key reasons given for general dissatisfaction and perceptions of poor value for money are poor quality of service/inefficient service, road maintenance in need of improving and road tax being used for purposes other than maintaining roads.

Executive Summary - 2

- From a prompted list, respondents consider the most important priorities for motoring agencies are ensuring people who drive illegally are prosecuted and ensuring people are kept informed about laws on motoring.

- There is considerable enthusiasm for a range of new initiatives and service developments related to motoring. Support is particularly high for radical measures, such as powers to the police to seize vehicles used by uninsured drivers and a database that checks vehicles on the road have insurance.

- Support is growing for facilities that allow motoring transactions to be conducted online. For example, 72% of Internet users say they would be likely to apply online for a replacement driving licence if the facility were available. Furthermore, more than half of all private motorists say they would use some type of Internet service to access Government motoring services.

Sub-group Analysis

Sub-group Analysis - 1

- The following slides present a summary of findings for the main sub-groups analysed in the survey. For more detail, the computer tables are presented in a separate volume, with each question analysed in total by three pages of sub-groups.

- **Men are more likely than women to be aware of motoring agencies**.

- **Awareness of motoring agencies also varies with age**. With agencies such as the DSA, private motorists under 35 years old are more likely than older motorists to have heard of this organisation. This is most likely due to the fact a large proportion of this group will have come across the DSA when applying for and taking their driving test. The 16-34 age group are also significantly more likely than older people to have a favourable view of the DSA.

Sub-group Analysis - 2

- **Private motorists from C2DE social class are more likely to exhibit negative views towards motoring agencies.** This group is significantly more likely than C1s to say that they are dissatisfied with the service they receive from government motoring agencies. In addition, almost two in five motorists of C2 social class say they get poor value for money (37% compared to 28% of private motorists overall).

- Levels of satisfaction and perceived value for money also **decrease with the age of the motor vehicle owned by the respondent**. Motorists who drive older vehicles (5 years +) are more likely to be dissatisfied. Those people with vehicles older than 10 years are significantly more likely to say they receive poor value for money. Drivers of older vehicles are more likely to be aware of and sensitive to the cost of motoring.

Sub-group Analysis - 3

- **Motorcyclists are another group that appear to be slightly more negative than other types of private motorists**. Motorcyclists are more likely to be dissatisfied with the quality of service they receive from motoring agencies, as well as say they get poor value for money. In terms of whether the DVO is meeting its corporate aims (i.e. improving road safety, reducing driver and vehicle-related crime and reducing harm to the environment), motorcyclists are also less likely than other groups to have a positive outlook.

- In terms of the uptake of Internet services related to motoring, there are key groups of motorists who are less likely to pursue these services. **In particular, motorists aged 55+, those from C2DE social class, those motorists not working and motorists with a disability are less likely to do any of the online transactions asked about** (e.g. applying for replacement driving licence or logbook).

Sub-group Analysis - 4

- In contrast, **current Internet users, young people, those from more affluent backgrounds, and motorists with children in their household are more likely to do online transactions** related to motoring, including applying for a replacement driving licence, logbook and renewing road tax.

Awareness and Attitudes towards Organisations

Awareness and Attitudes towards Organisations - Summary

- **Familiarity is up on 2003 for all government agencies asked about but this is not matched with improvements in favourability** for all (e.g. DVLA).

- This year sees an **increase in satisfaction with government agencies that deal with motoring**. Agencies are viewed as more efficient, easier to contact and better at keeping things simple than in 2003.

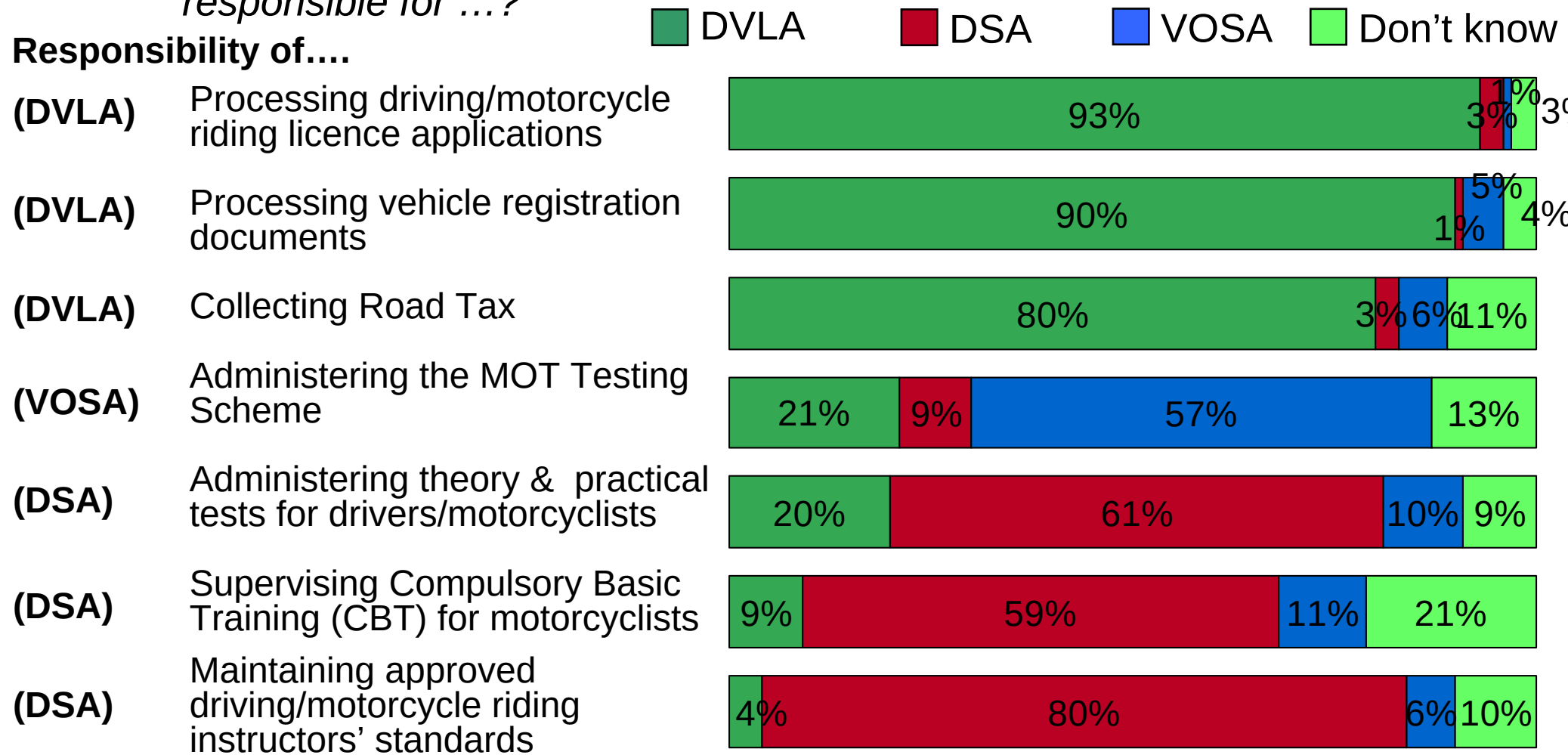
- The key reasons given for dissatisfaction and perceptions of poor value for money are poor quality of service/inefficiency, poor road maintenance and road tax being used for purposes other than maintaining roads.

- **Cracking down on illegal driving** (and being seen to do so) and **improving the way in which non-compliant motorists are prosecuted** may help to raise levels of satisfaction in the future.

- **Private motorists are more satisfied than commercial operators with the efforts made by government agencies that deal with motoring to improve road safety**. In contrast they are **less satisfied with the efforts being made to reduce driver and vehicle-related crime** and **to reduce harm to the environment.**

Responsibilities – DVLA, DSA and VOSA

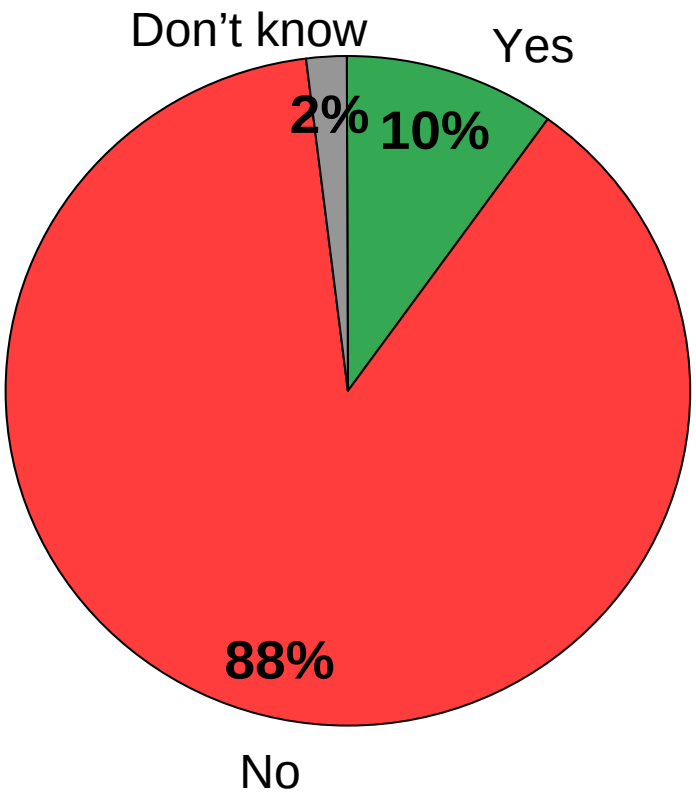
QA3 Please tell me whether you think the DVLA, the DSA or VOSA is responsible for …?



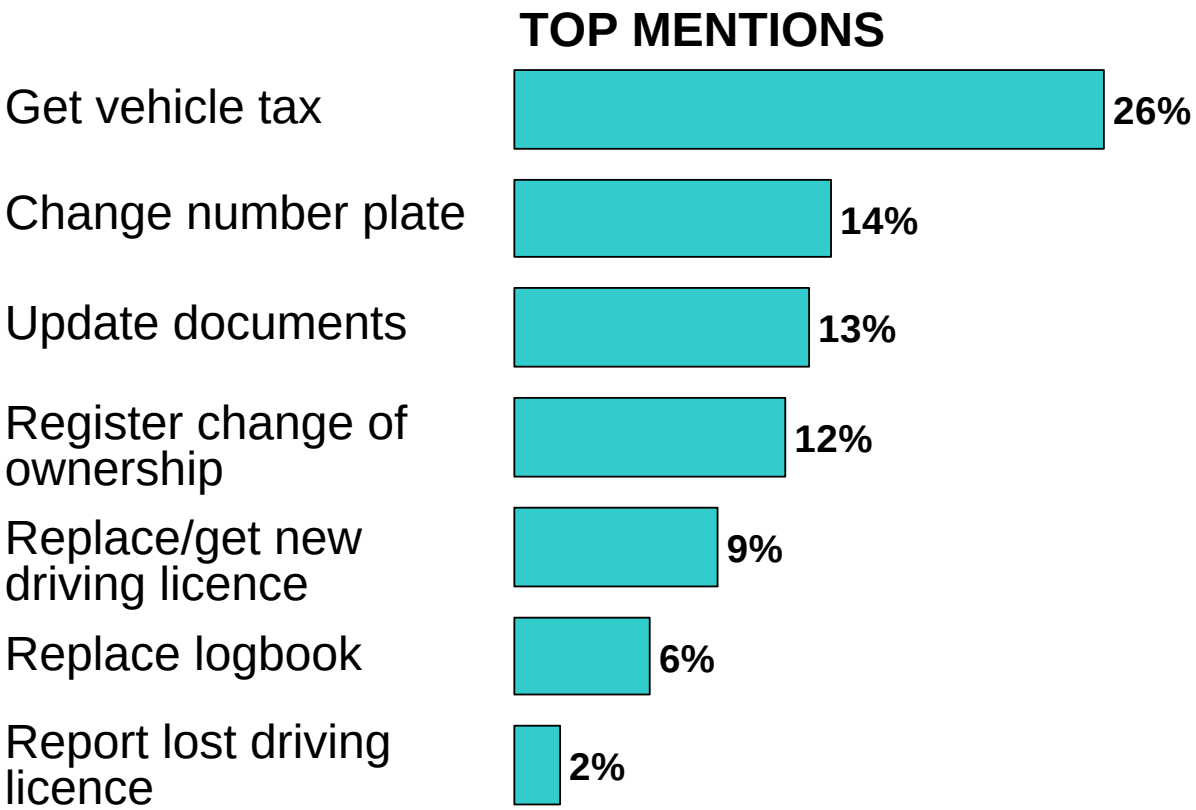
Base: All answering who have heard of DVLA, DSA and VOSA (355)

DVLA Local Office

QH11 Have you used a DVLA Local Office in the last 12 months?



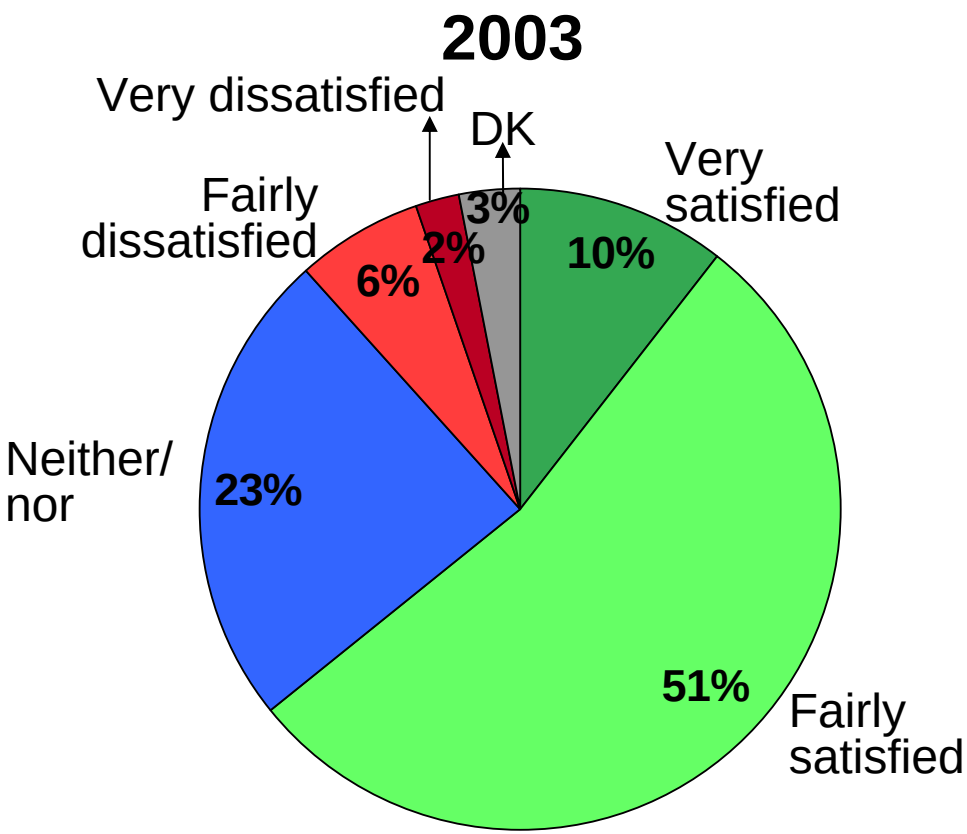
QH12 What are the main purposes of your visits to DVLA Local Offices?

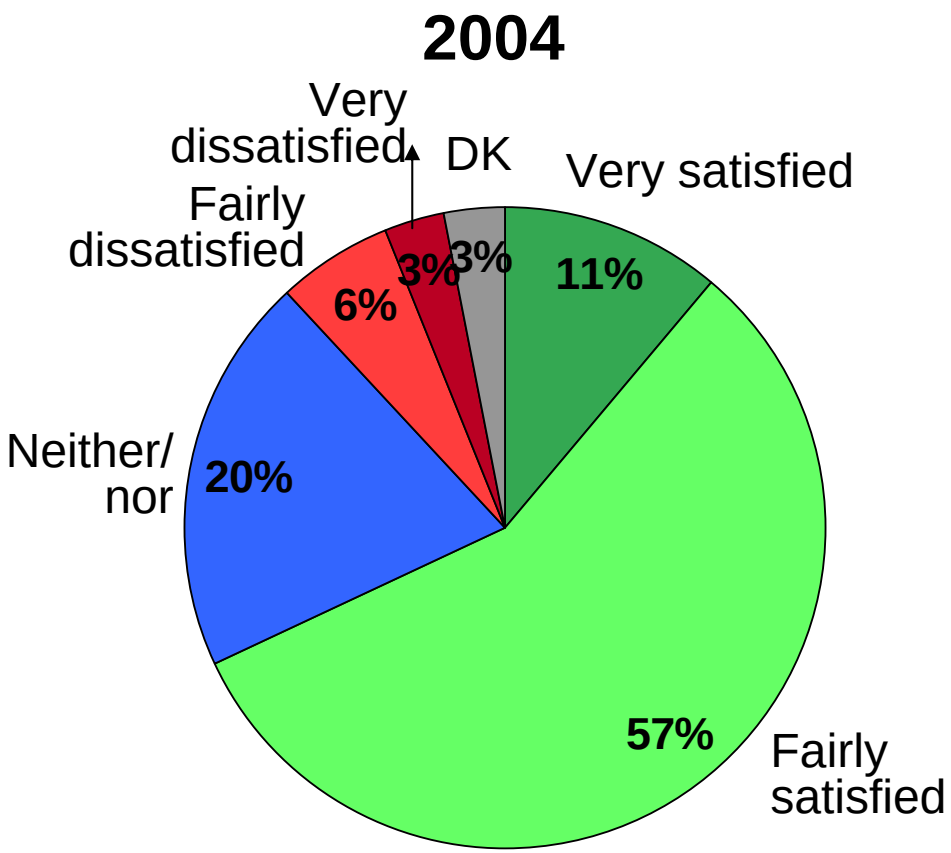


Base: All (1,044)
Base: All who have used DVLA Local Office in last 12 months (105)

Satisfaction with Government Agencies

QA4 Overall how satisfied or dissatisfied are you with the quality of service you receive from government agencies which deal with motoring?

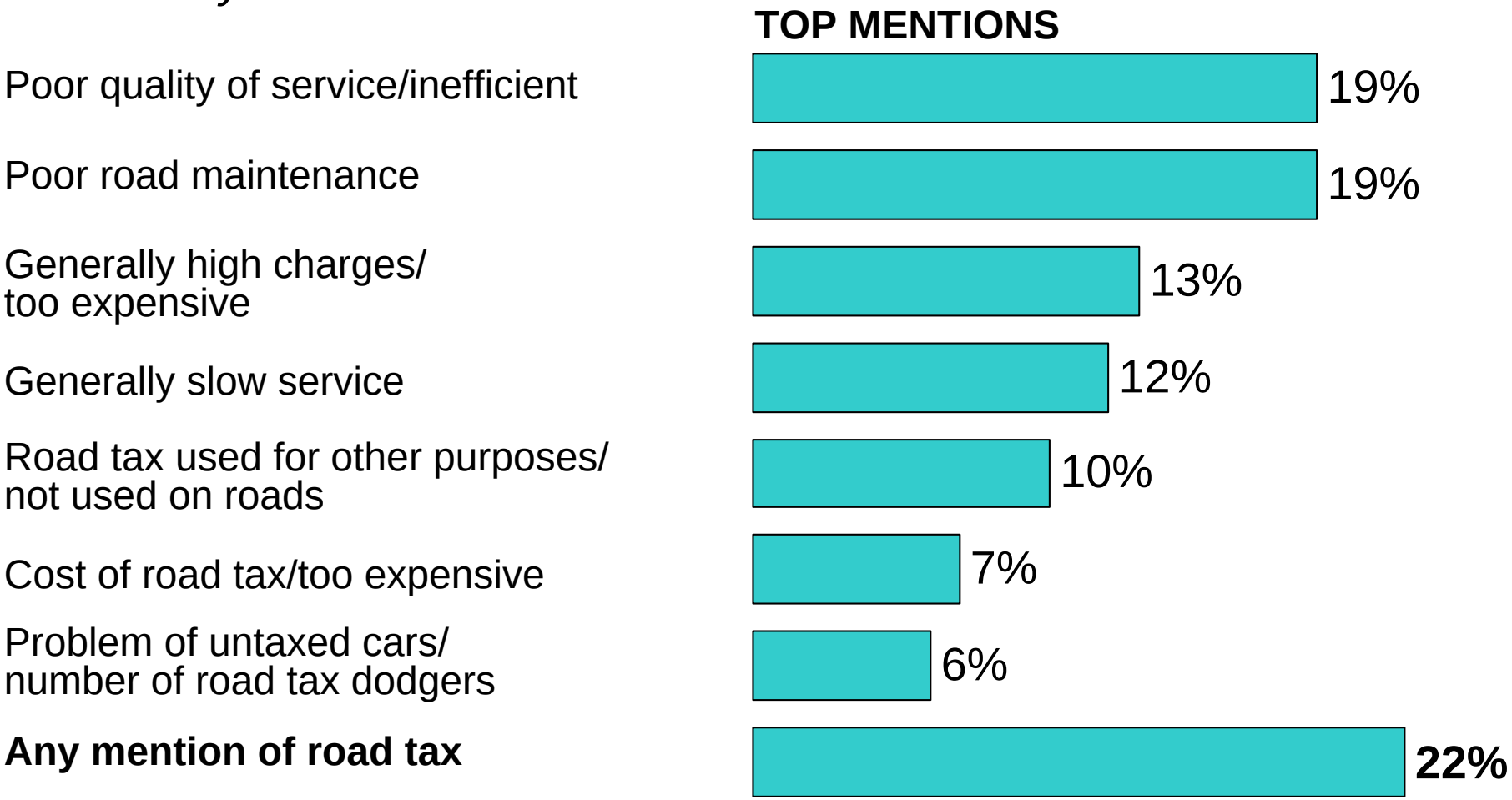




Base: All (1,044), 2004; All Drivers (816), 2003

Reasons for Dissatisfaction with Service

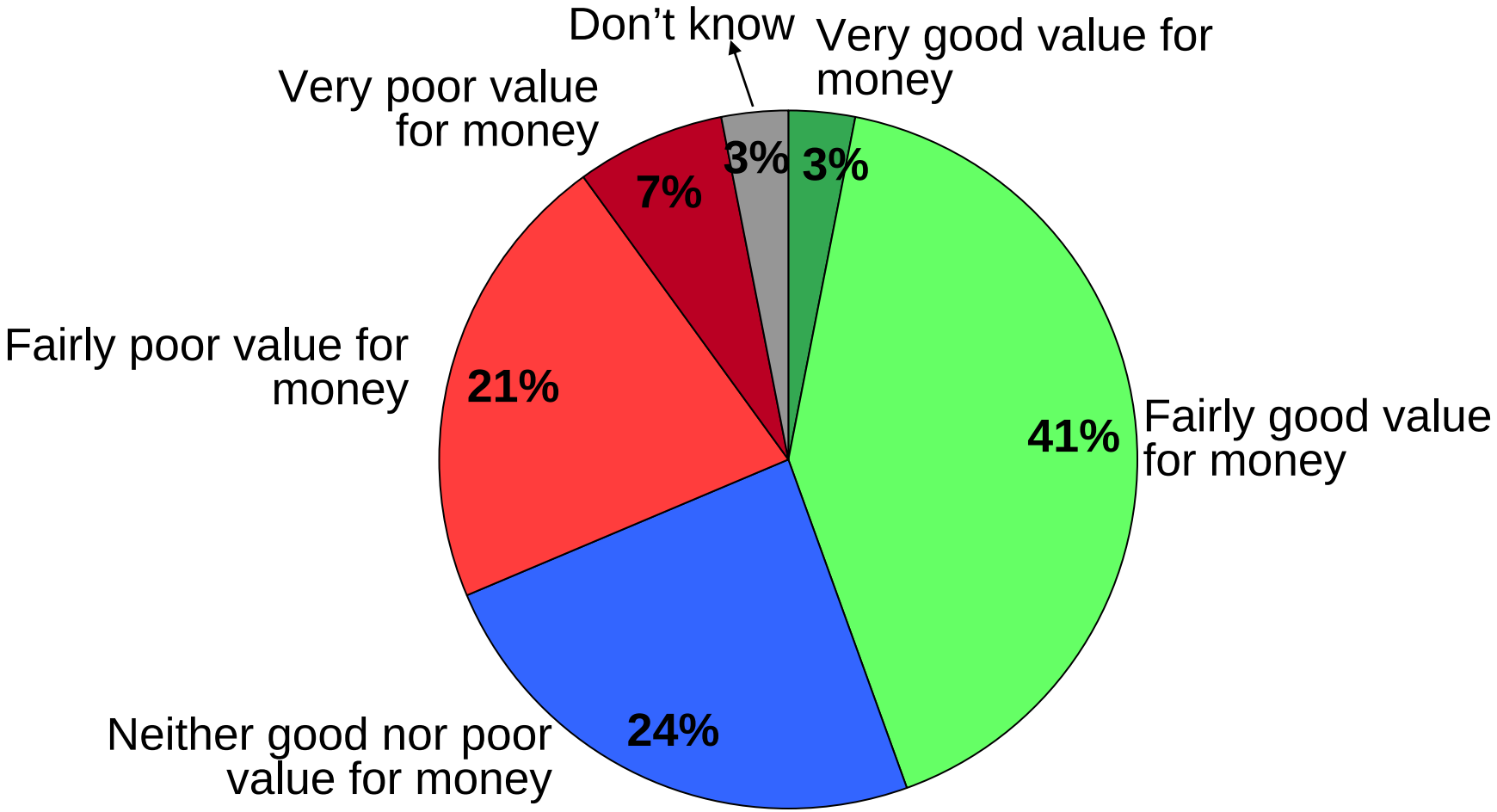
QA5 You say that you are very/fairly dissatisfied with the quality of service you receive from government agencies which deal with motoring. Why do you say that?



Base: All dissatisfied with quality of service (93)

Value for Money from Government Agencie

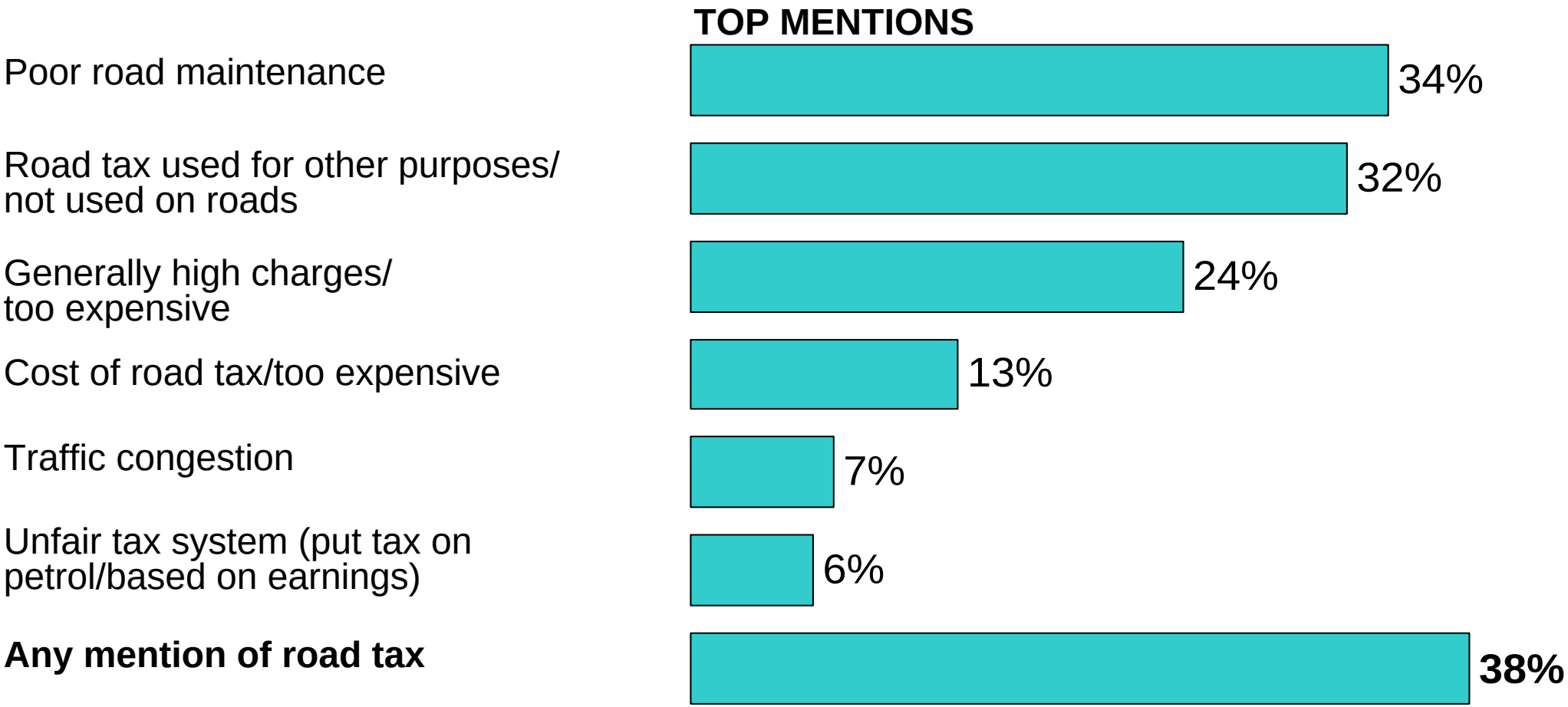
QA6 Overall how good or poor value for money do you believe you get from government agencies which deal with motoring?



Base: All answering who have heard of the DVLA, DSA and VOSA (359)

Reasons for Poor Value for Money

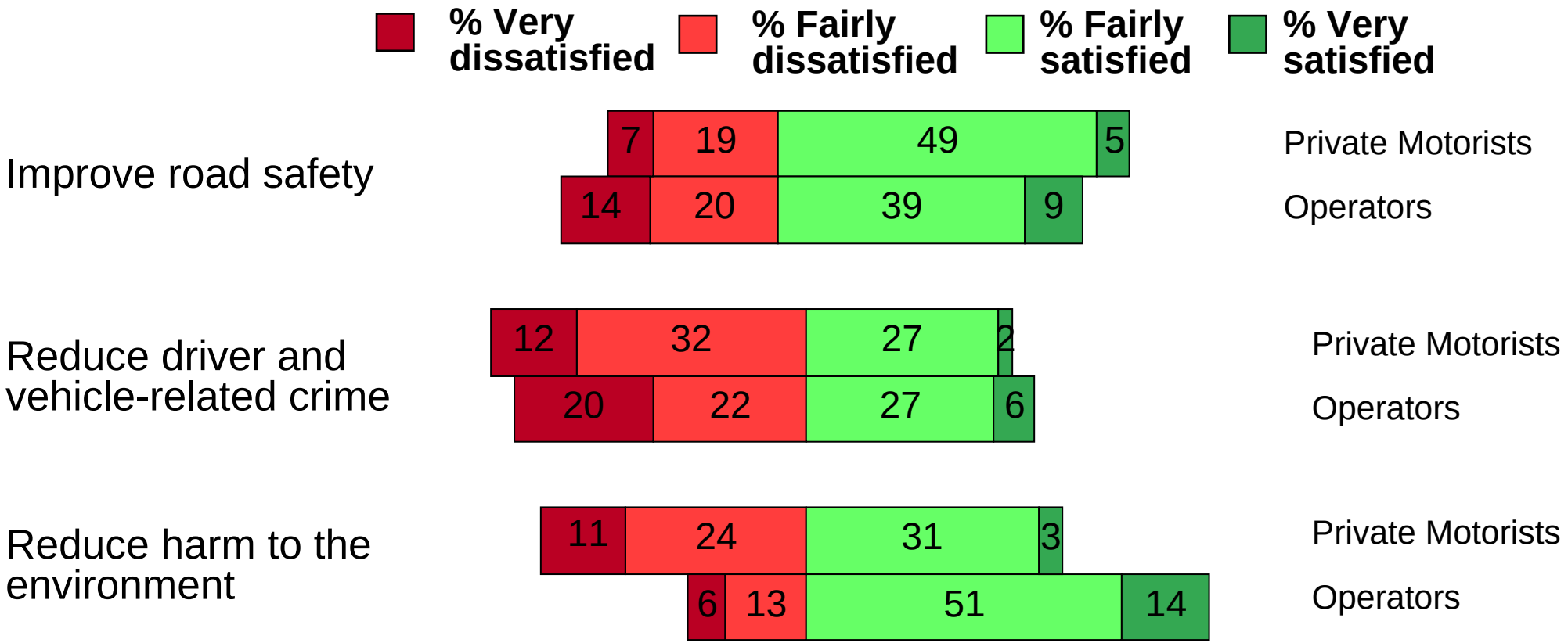
QA7 Why do you say that you get very/fairly poor value for money from government agencies that deal with motoring? What in particular is poor value for money?



Base: All who believe they get poor value for money (102)

DVO Corporate Aims

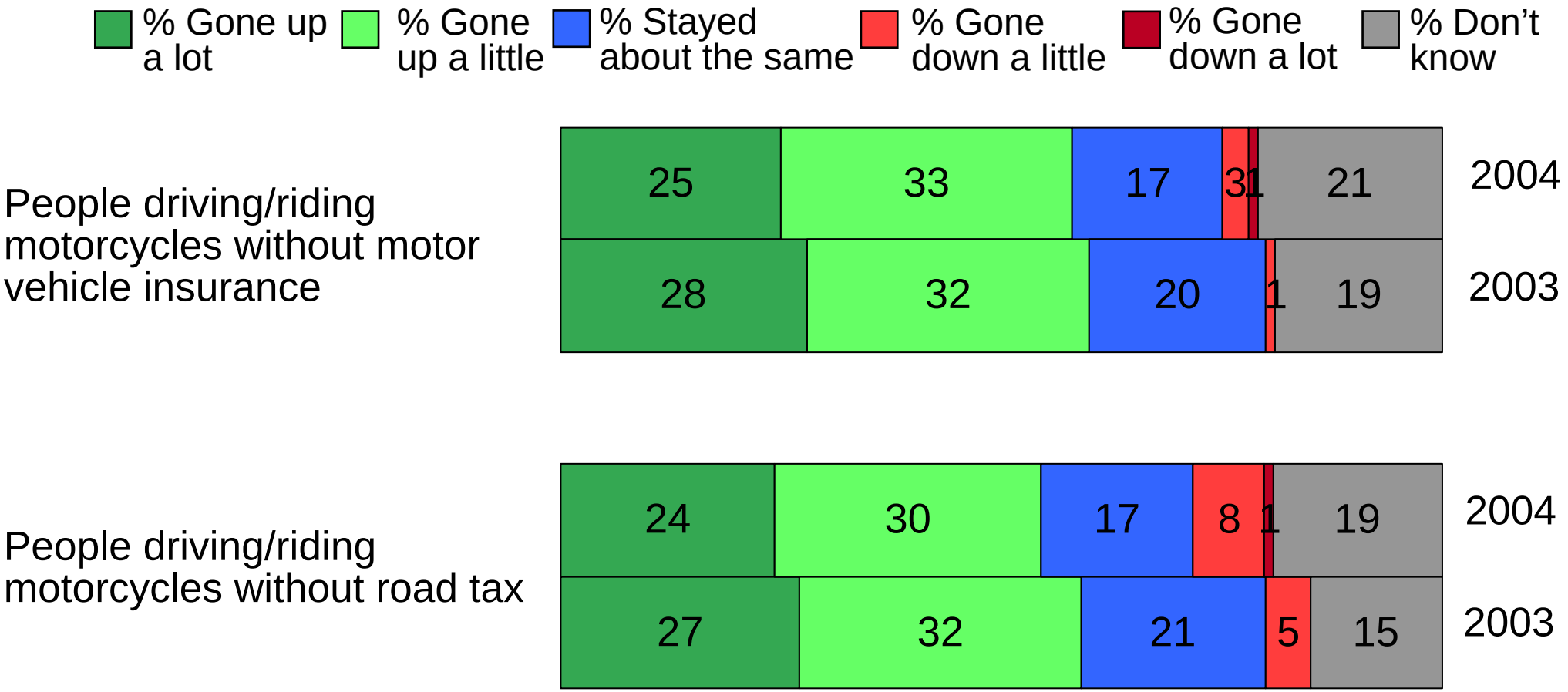
QA11 How satisfied are you with efforts made by Government agencies that deal with motoring?



Base: All (1,044) Private Motorist Survey; All (700) Operators Survey

Perceptions of Road Safety and Vehicle-Related Crime - 1

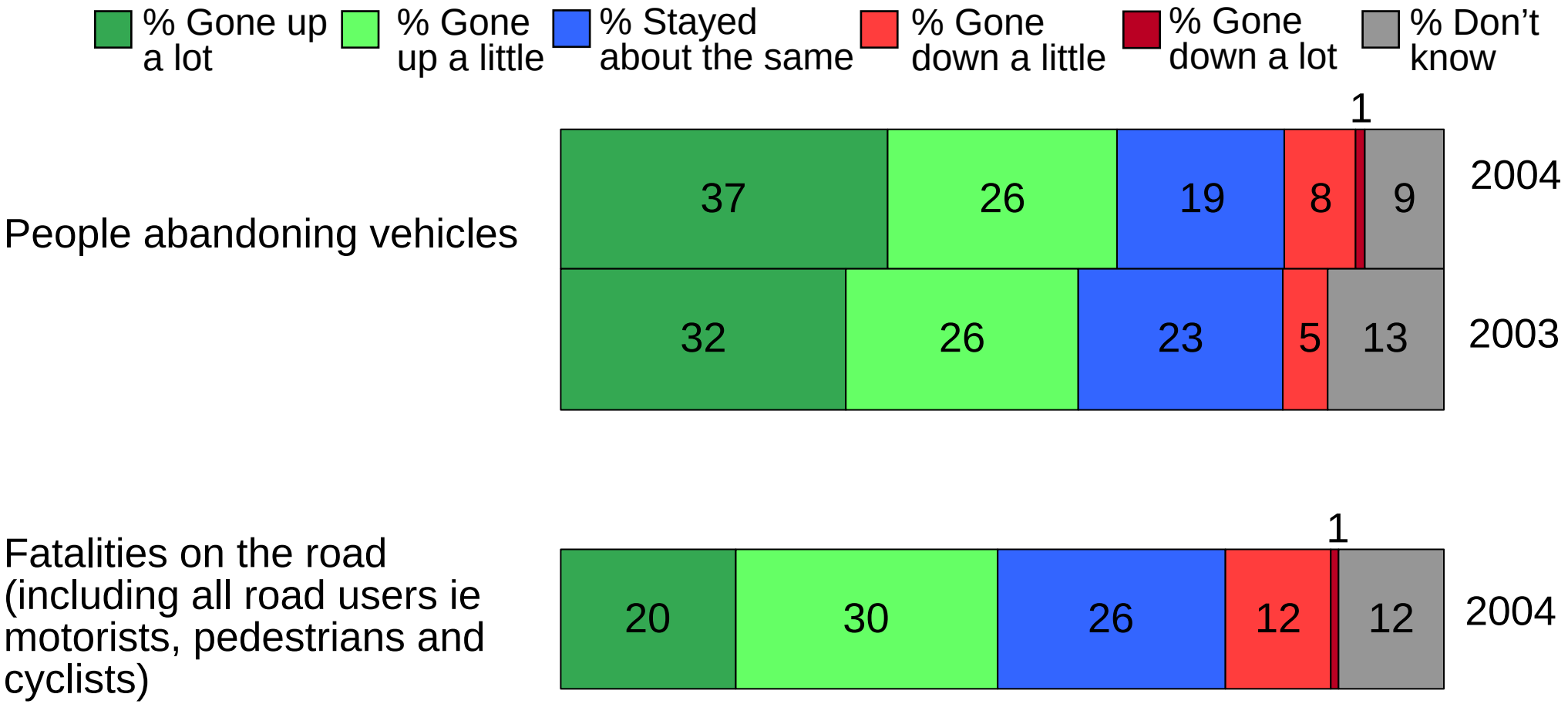
QG6 Do you think the level of each of these has gone up, gone down or stayed the same over the last year?



Base: All (1,004), 2004; All drivers (816), 2003

Perceptions of Road Safety and Vehicle-Related Crime - 2

QG6 Do you think the level of each of these has gone up, gone down or stayed the same over the last year?



Base: All (1,004), 2004; All drivers (816), 2003

Priorities for Motoring Agencies

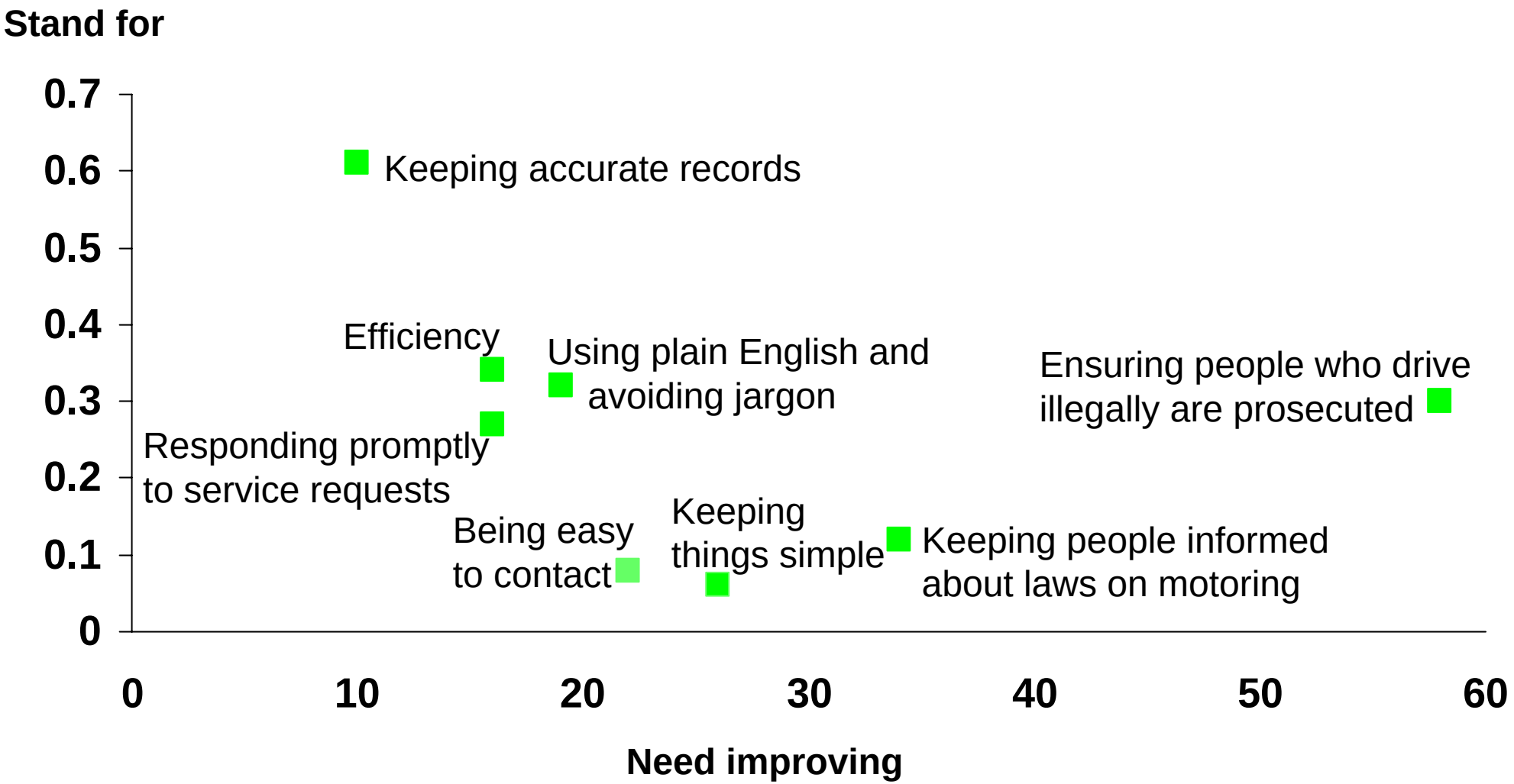
Priorities for Motoring Agencies - Summary

- Compared to 2003, a similar set of issues are presenting themselves as priorities for action for motoring agencies. The most important priorities for motoring agencies are **ensuring people who drive illegally are prosecuted** and that **people are kept informed about laws on motoring.** The latter has gained momentum since 2003, with more than twice as many motorists viewing this issue as in need of improvement (although question wording has slightly changed).

- **Keeping things simple** and **being easy to contact** are considered to be in need of improvement by a lower proportion of motorists in 2004. Related to this, a greater proportion of motorists rate **finding the telephone number** they want or **finding information on the Internet** as ‘easy’. However, **obtaining forms** is rated less well.

- Motoring agencies should also focus on improving how well they communicate with motorists through **the use of clearer English** and **less jargon**.

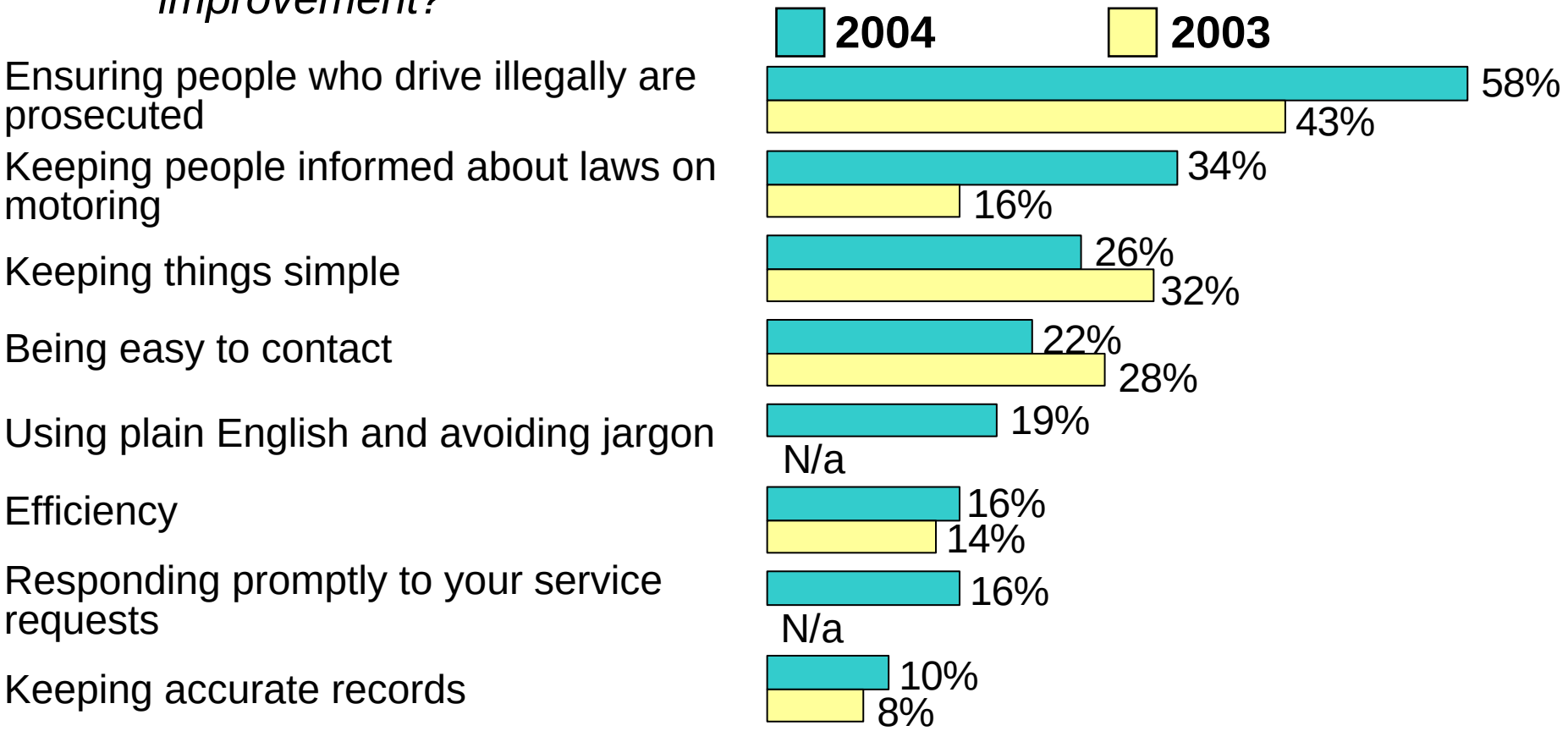
Priorities for Motoring Agencies



Base: All (1,044)

Government Agencies - Improvement

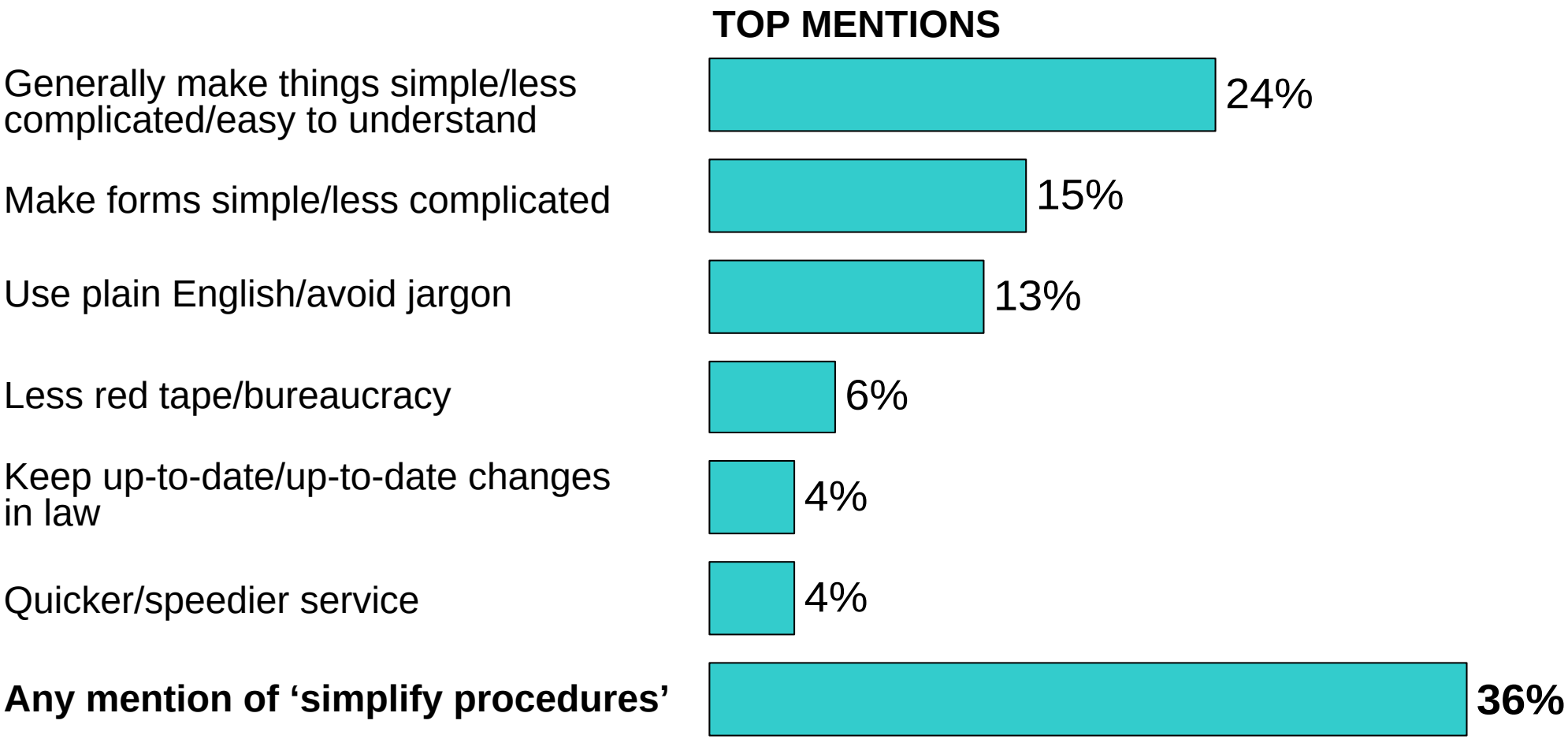
QA9 Now, thinking about the experience you have had with government agencies that deal with motoring, which, if any, of these are most in need of improvement?



Base: All (1,044), 2004; All drivers (816), 2003

Keeping Things Simple

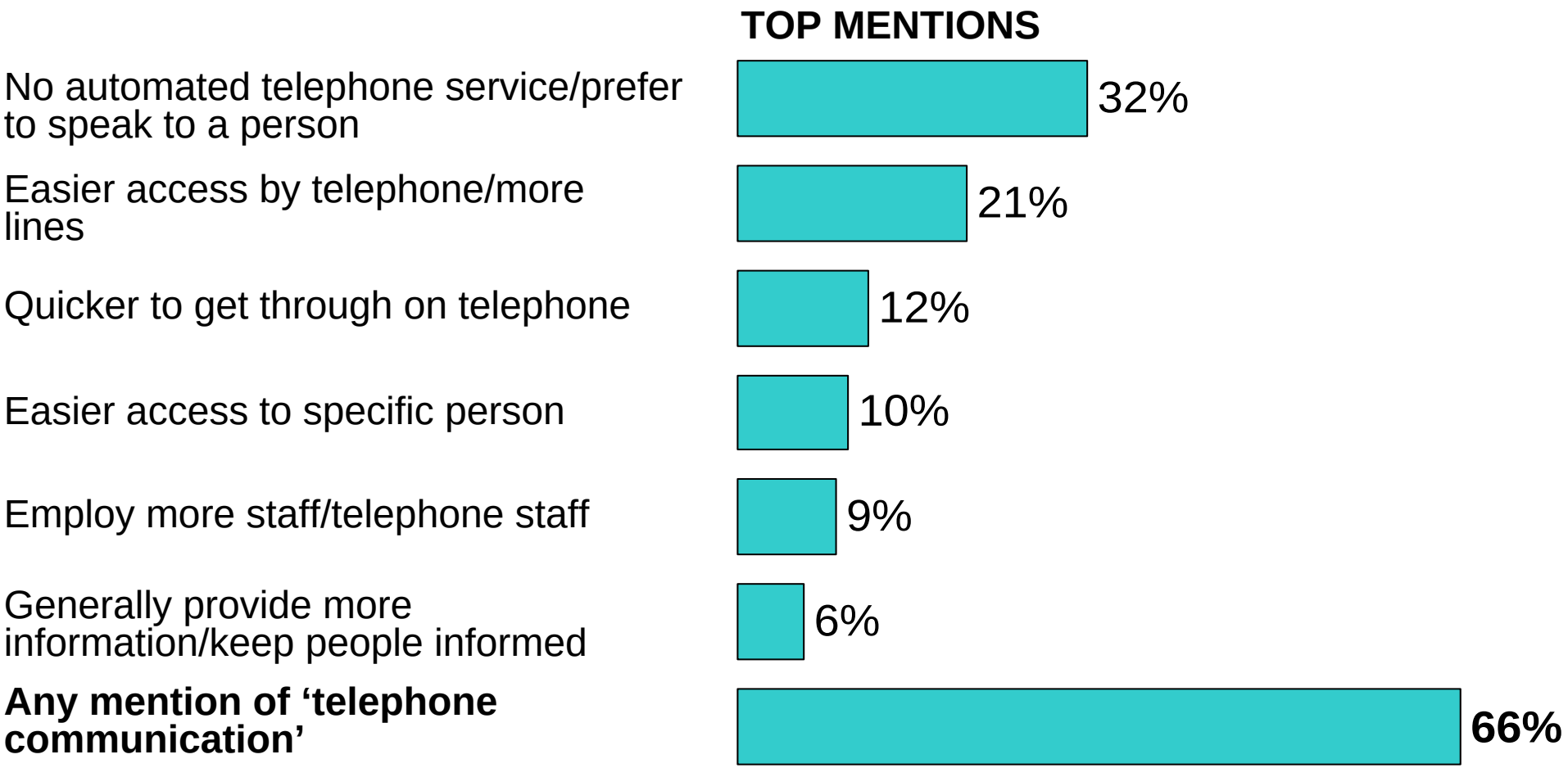
QA10 You said that 'keeping things simple' needs improving, what could be done to improve this?



Base: All who mention 'keeping things simple' (123)

Being Easy to Contact

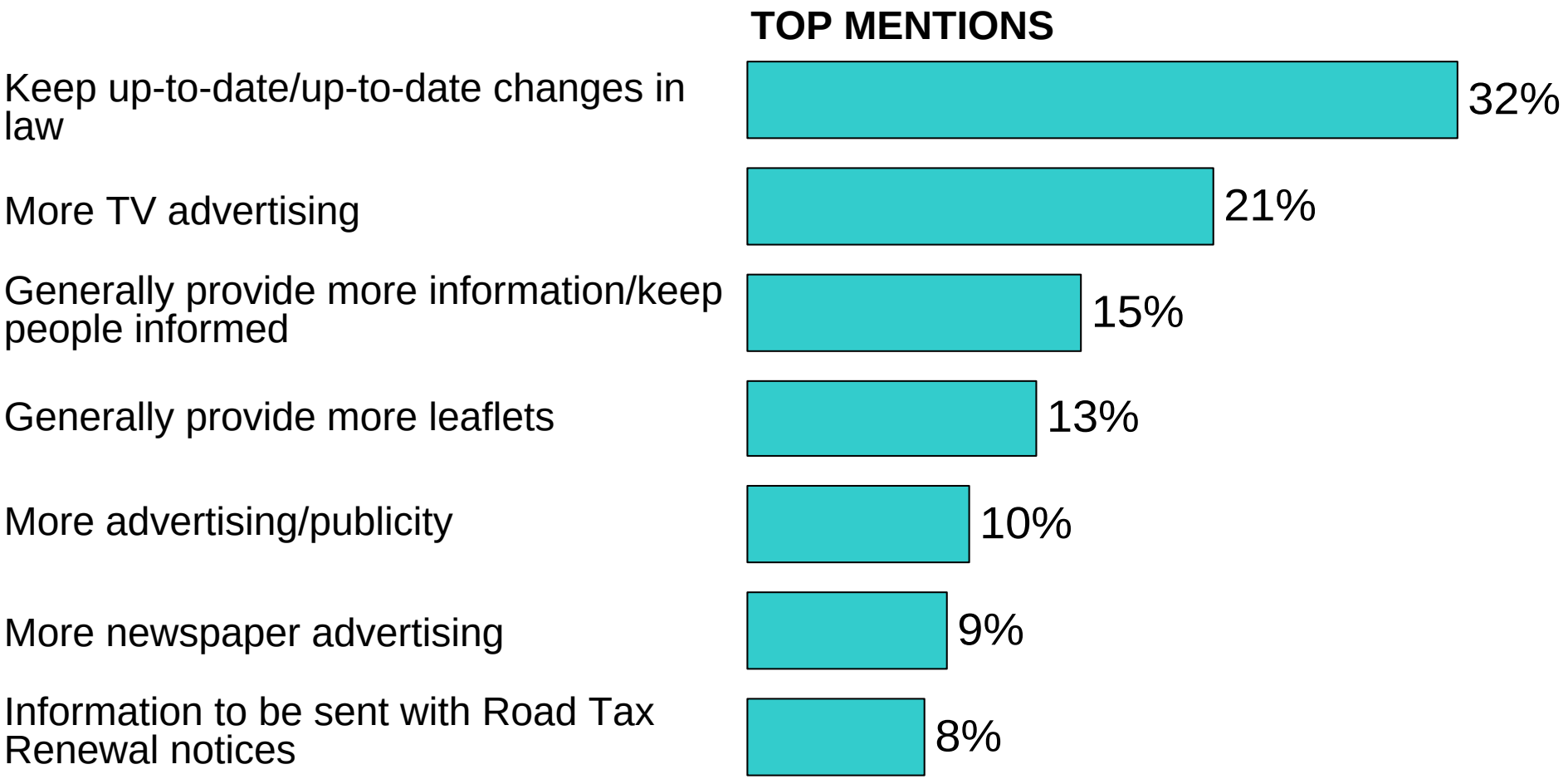
QA10 You said that 'being easy to contact' needs improving, what could be done to improve this?



Base: All who mention 'being easy to contact' (102)

Keeping People Informed about Laws on Motoring

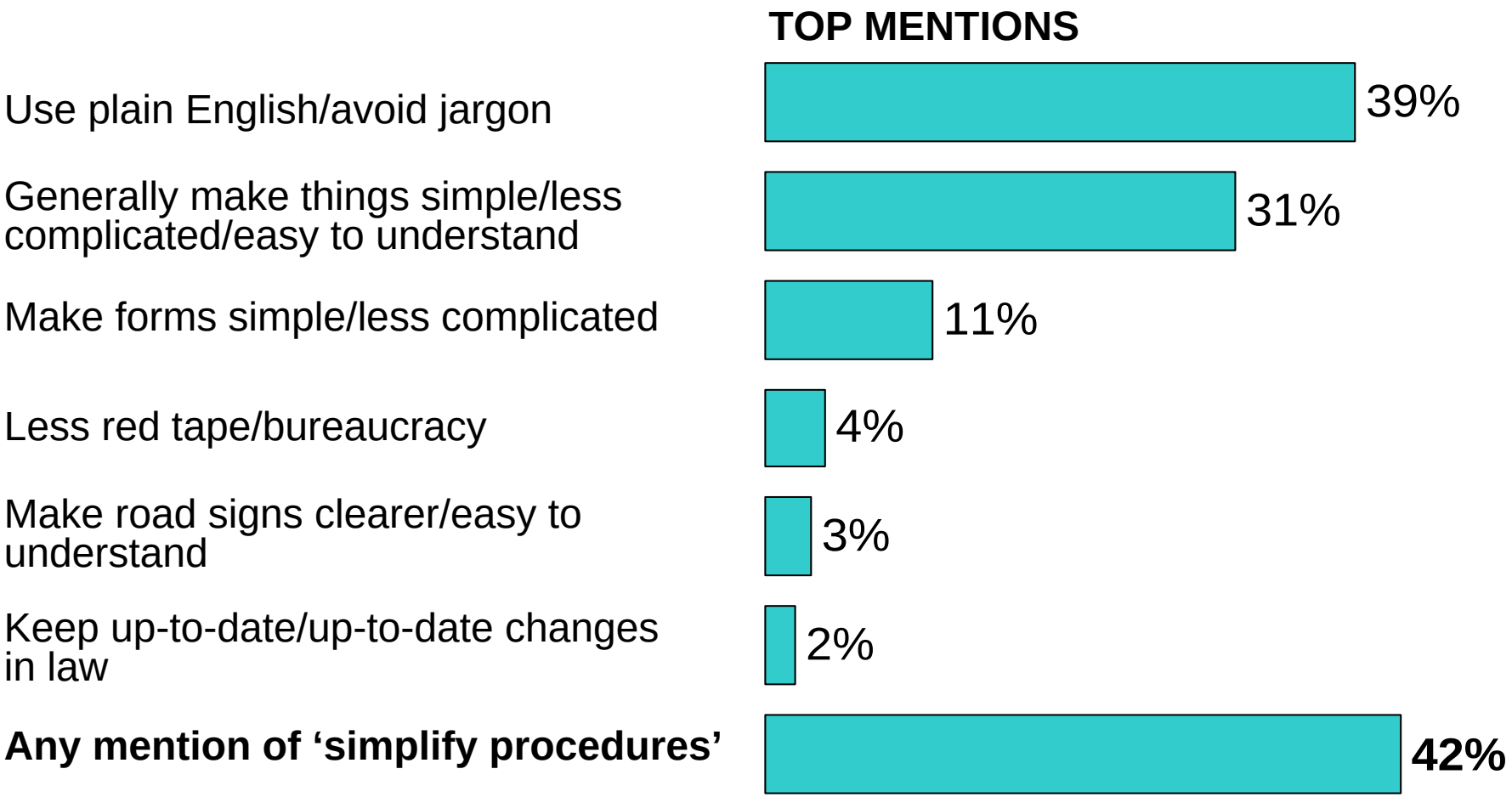
QA10 You said that 'keeping people informed about laws on motoring' needs improving, what could be done to improve this?



Base: All who mention 'keeping people informed about laws on motoring' (212)

Using Plain English and Avoiding Jargon

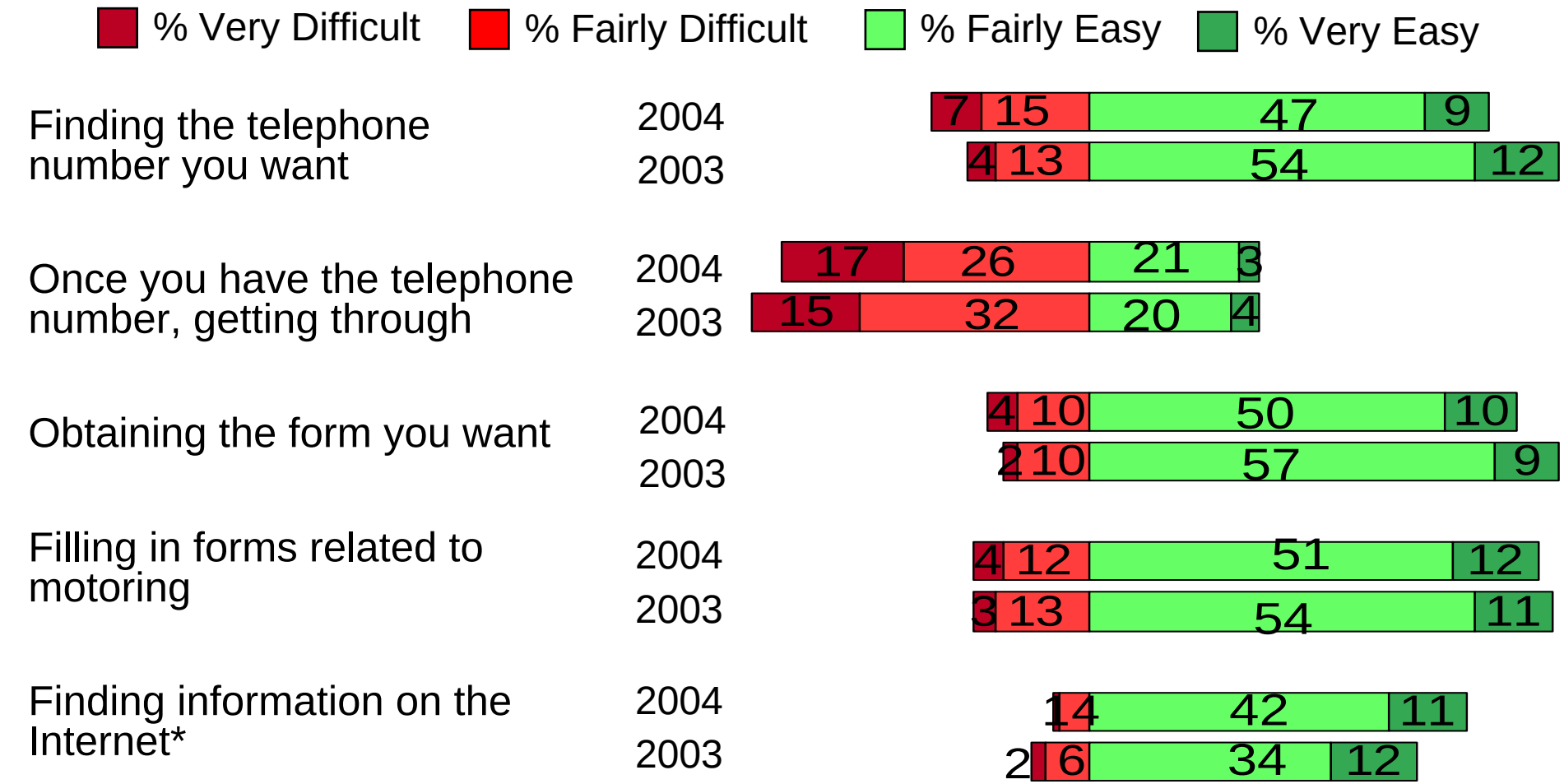
QA10 You said that 'using plain English and avoiding jargon' needs improving, what could be done to improve this?



Base: All who mention 'using plain English and avoiding jargon' (71)

Ease of Motor Related Needs

QH10 How easy or difficult is it to do the following?



Base: All (1,044), 2004; All drivers (816), 2003
*Base: All who use the Internet (661), 2004; (504), 2003

DVO Group Service Interactions

DVO Group Service Interactions - Summary

- **The level of satisfaction with a range of motoring services has decreased since 2003.**

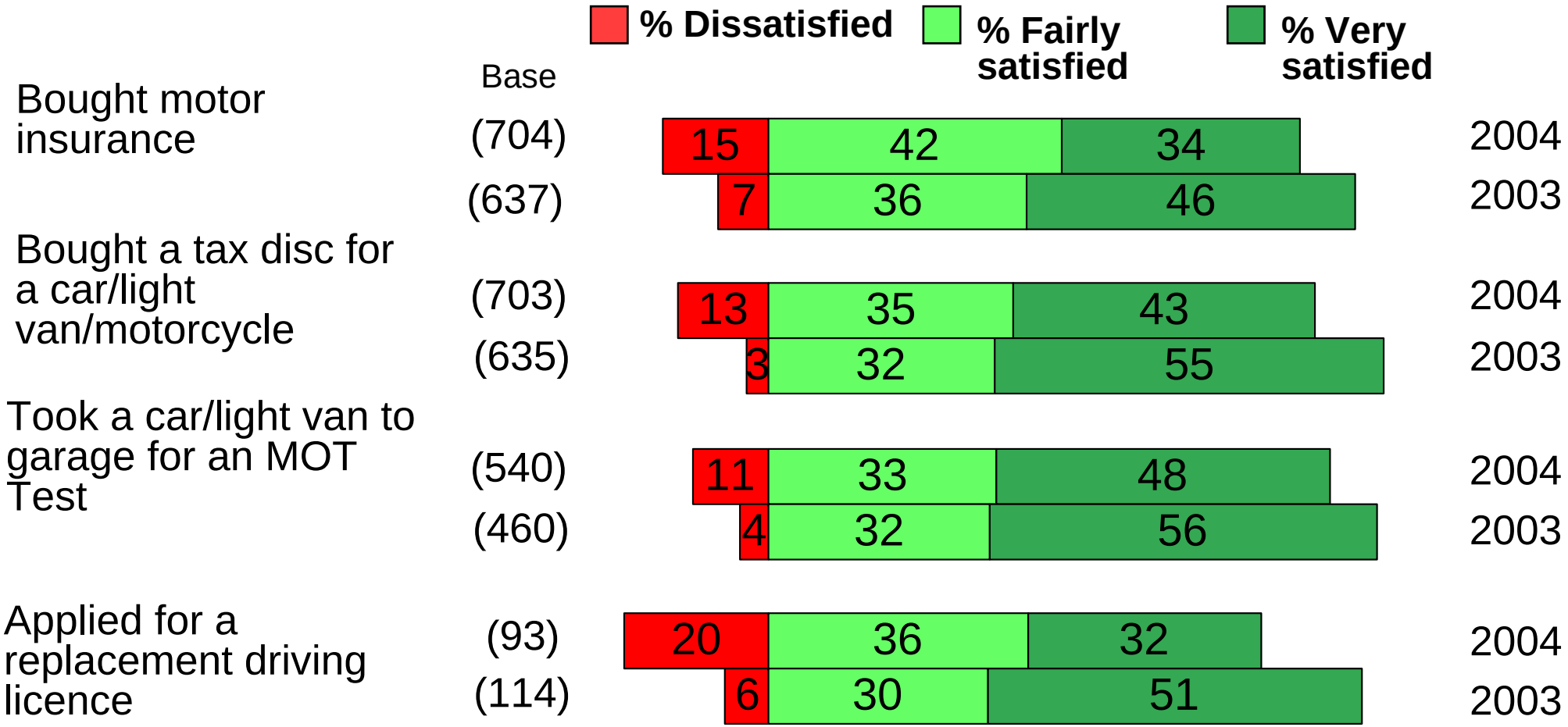
- **Levels of dissatisfaction with applying for a replacement driving licence have increased from 6% in 2003 to 20% in 2004.** Of those reasons given, over complicated forms and difficulties reaching the appropriate people when making enquires appear to be prominent.

- **Dissatisfaction with applying for a refund on a tax disc for a car/light van/motorcycle has also increased since last year** (up from 2% in 2003 to16% in 2004). Closure of some Post Offices and the time it takes to queue in outlets are the core reasons for this rise in dissatisfaction.

- Despite a greater proportion of respondents being negative this year, **overall levels of satisfaction still remain high for a number of motoring transactions**. For example, four in five motorists who have taken a vehicle for an MOT in the last year say that they are satisfied with the service. In addition, levels of satisfaction with having a car scrapped have increased since 2003.

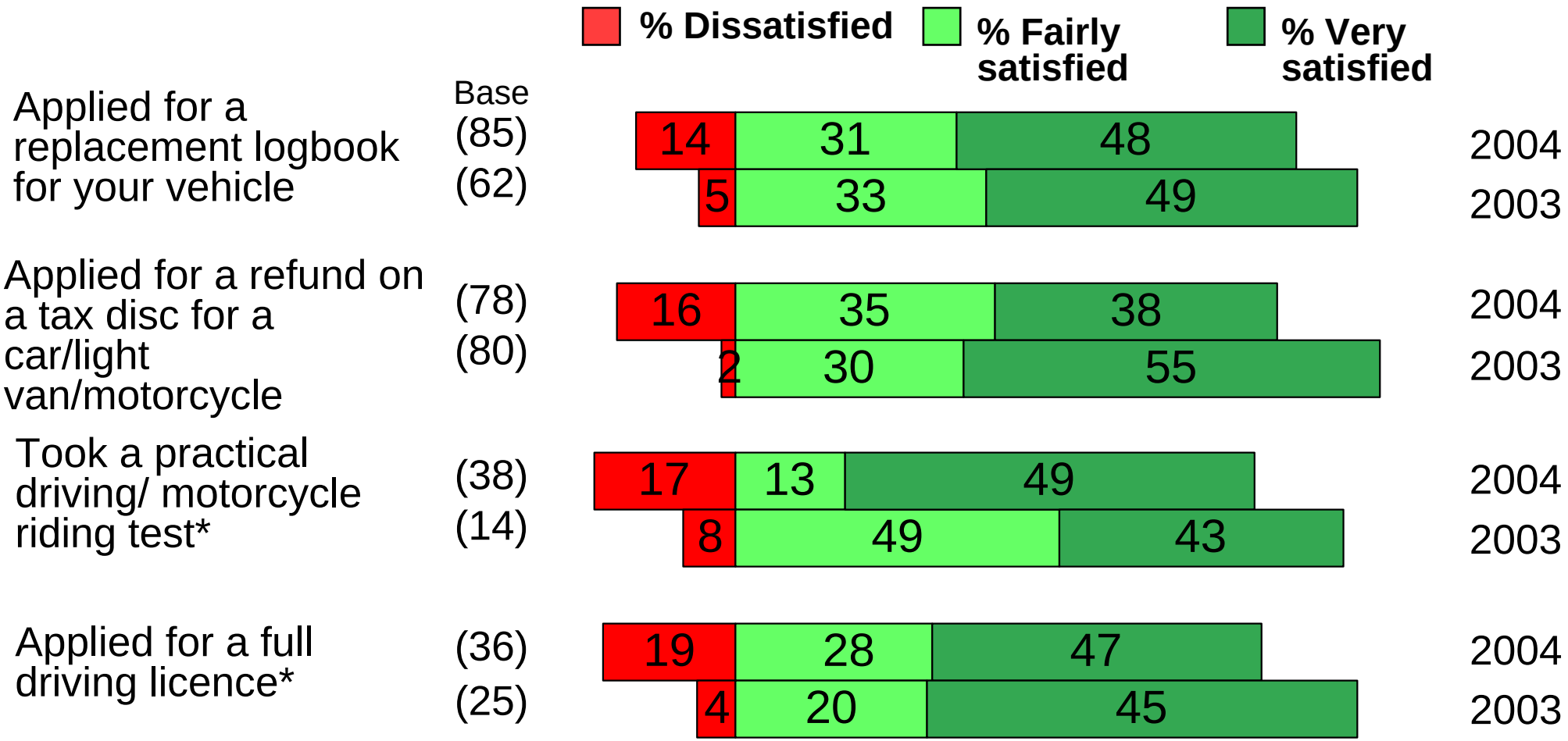
Motoring Service Interactions – Done in Past Year

Qb1a/b/c *Thinking about the last time you….., how satisfied or dissatisfied were you with the quality of service you received?*



Motoring Service Interactions – Done in Past Year

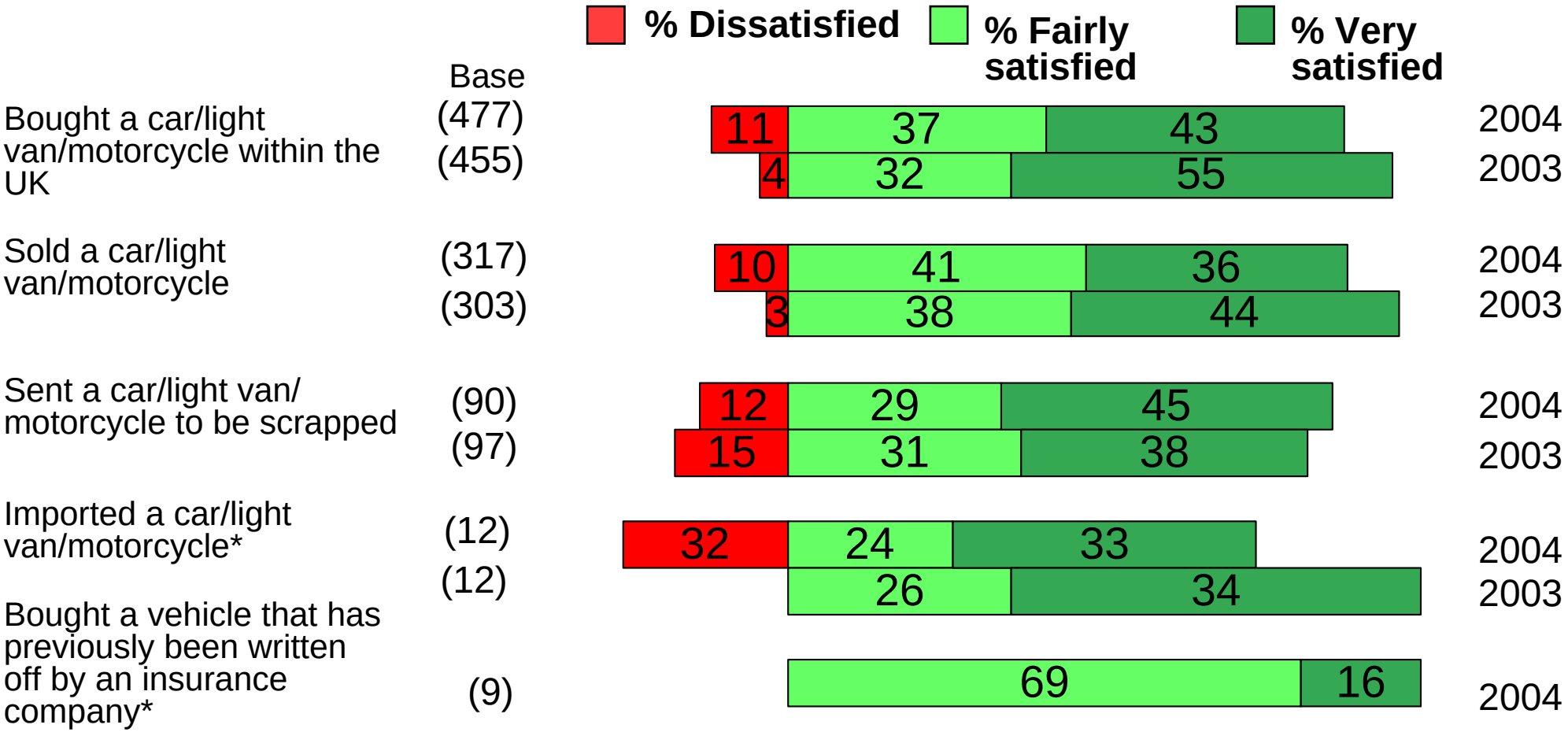
Qb1a/b/c *Thinking about the last time you….., how satisfied or dissatisfied were you with the quality of service you received?*



*Very small base sizes

DVO Group Service Interactions – Done in Past 5 Years

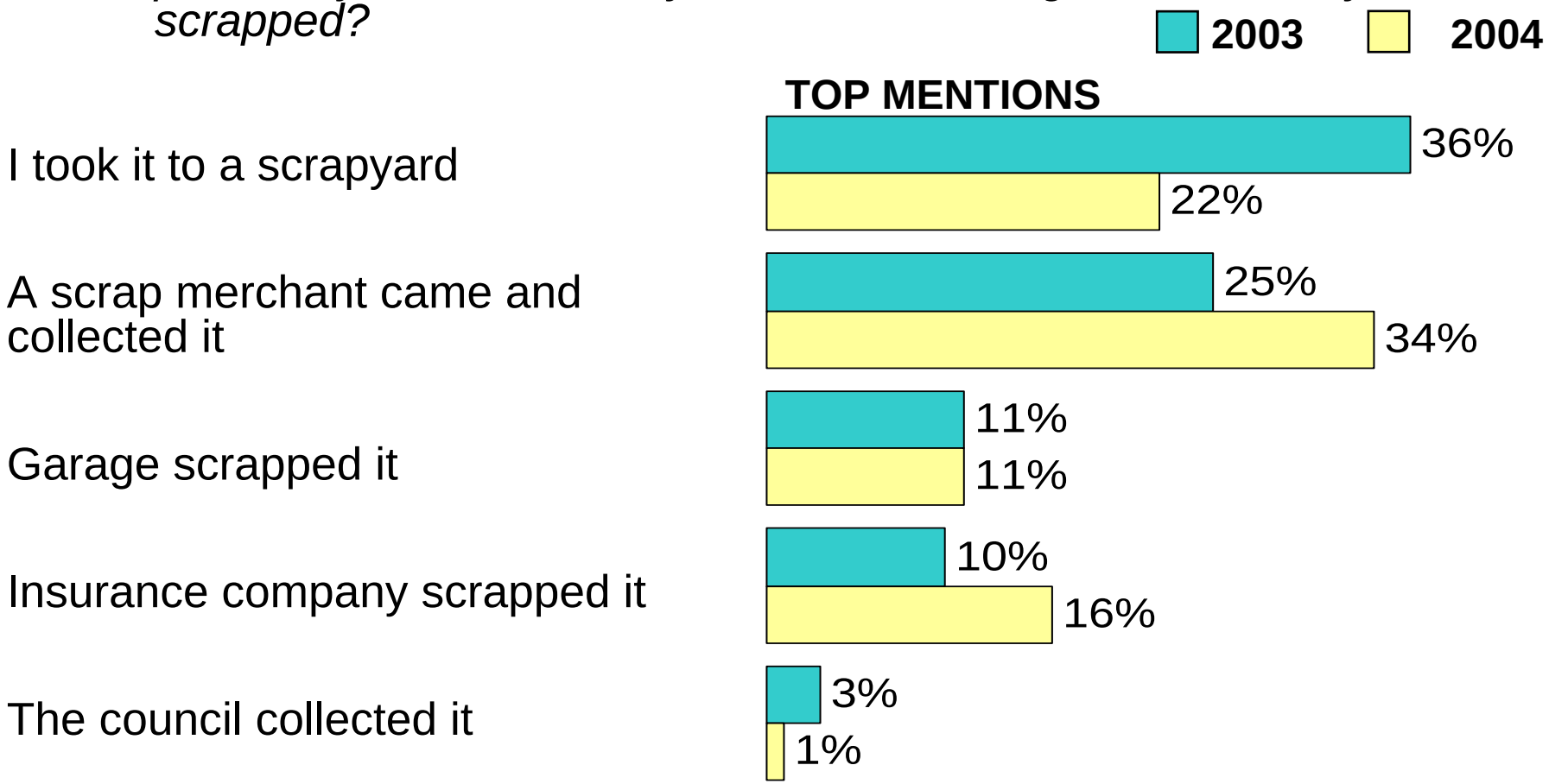
Qb1a/b/c *Thinking about the last time you….., how satisfied or dissatisfied were you with the quality of service you received?*



*Very small base sizes

Vehicle Scrapping Methods

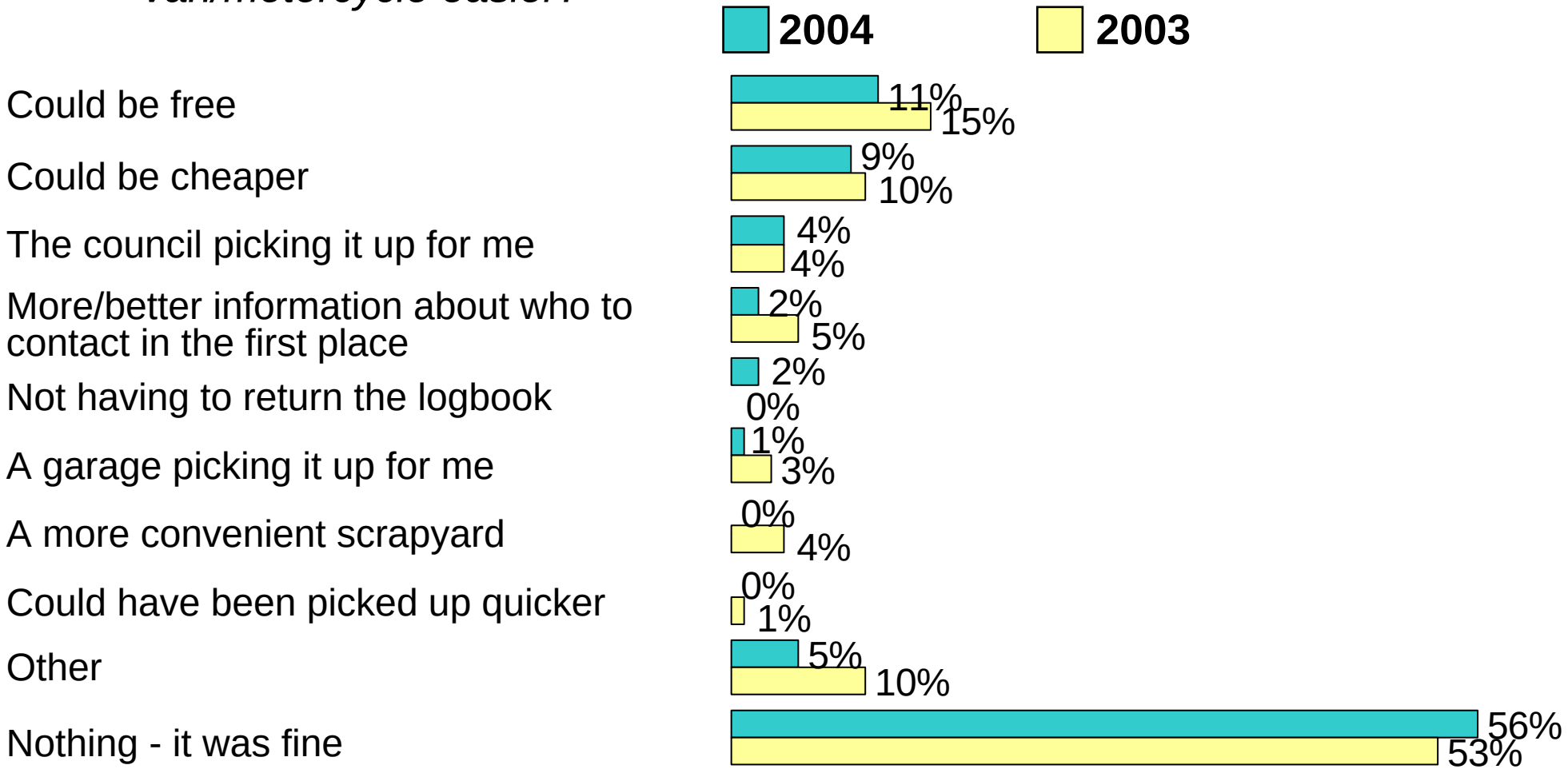
QB3 Now, you say you sent a car/light van/motorcycle to be scrapped in the past five years. How did you send the car/light van/motorcycle to be scrapped?



Base: All who have sent a car/light van/motorcycle to be scrapped in the last 5 years (89), 2004; All drivers who sent a car/light van to be scrapped (97), 2003

Improvements to Vehicle Scrapping Methods

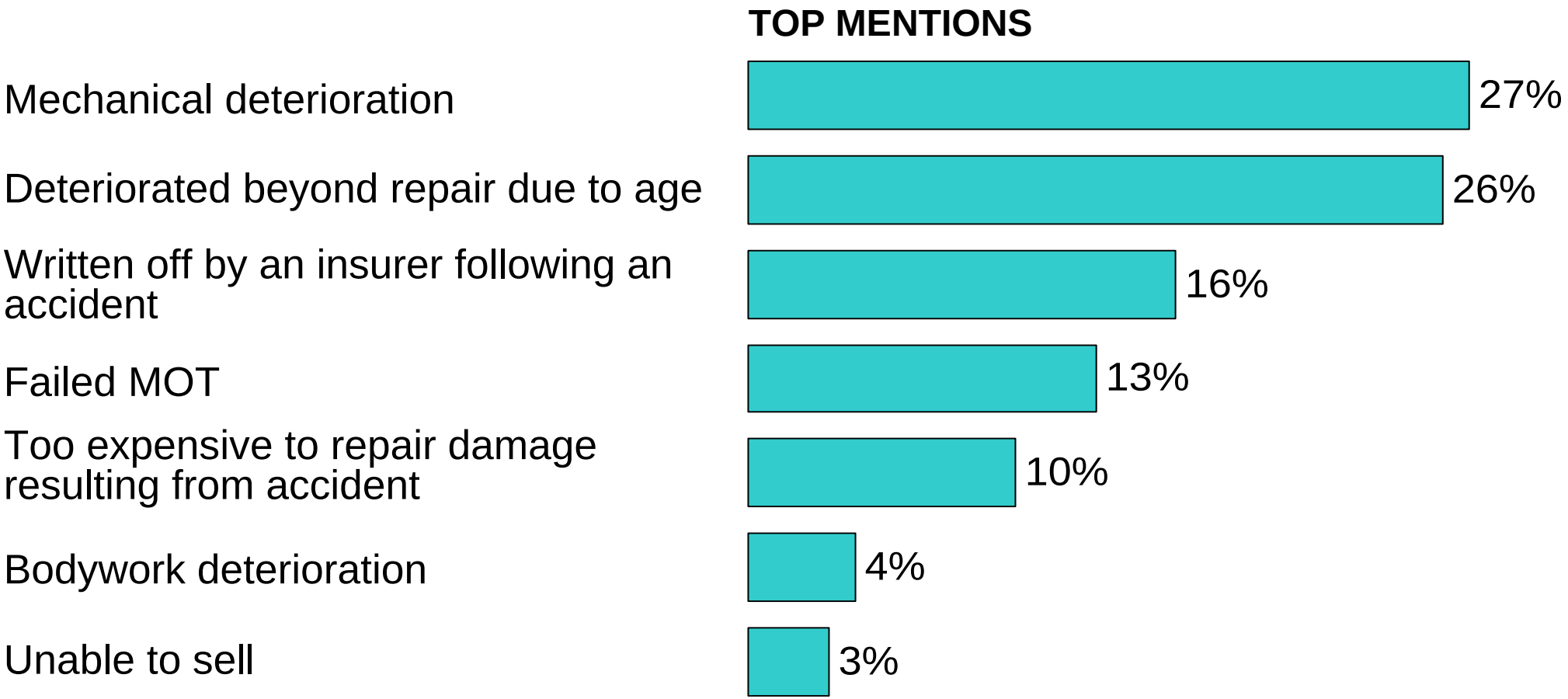
QB6 What, if anything, would have made scrapping your car/light van/motorcycle easier?



Base: All who have sent a car/light van/motorcycle to be scrapped in the last 5 years (89), 2004; All drivers who sent a car/light van to be scrapped (97), 2003

Reasons for Scrapping Vehicle

QB4 For what reason/s did you decide to have a car/light van/motorcycle scrapped?



Base: All who have sent a vehicle to be scrapped in the past five years (89), 2004

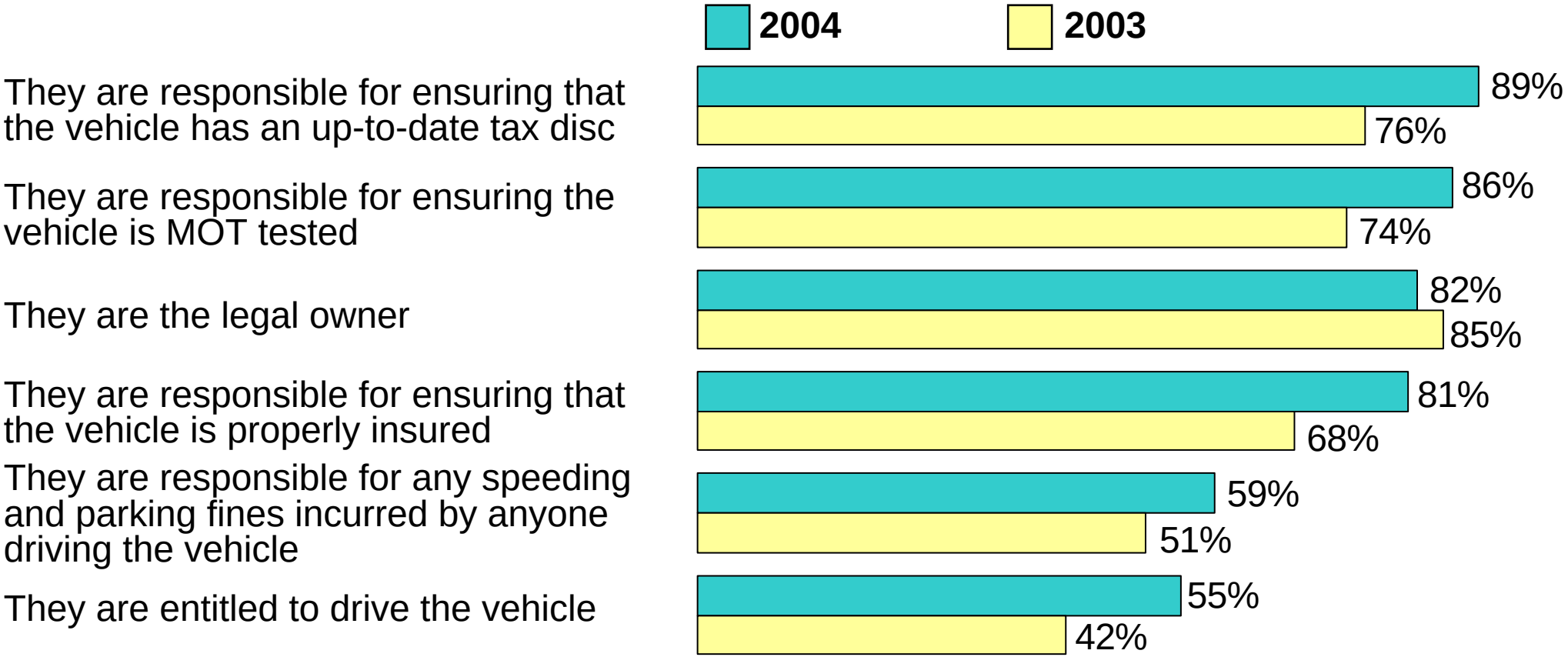
Vehicle Registration

Vehicle Registration - Summary

- Compared to 2003, a **higher proportion of private motorists now correctly identify the responsibilities of the registered vehicle keeper**.
- **The majority of private motorists are aware of the new vehicle registration and licensing system** (82%).
- Of those that are aware, **two in five (42%) strongly support the system and the same proportion 'tend to support' it (40%).**
- **Very few private motorists do not keep their logbook up-to-date**; still for 4% of motorists (c. 1.2 million people) the logbook details are inaccurate. The results mirror those for 2003.
- **Just over half of all private motorists say that they have received a new style logbook (54%),** compared to nearly two in five who say they have not.
- Around **one-fifth** (21%) of private motorists who read the literature that came with their new style logbook, **did not understand that they were required to destroy their old logbook**.
- Of all the people who received a new logbook, around **half destroyed their old logbook** as required.

Understanding Vehicle Registration

QC1 The person who registers a vehicle is called the registered vehicle keeper, and their name appears on the vehicle logbook. Which of these things, if any, do you think that means?

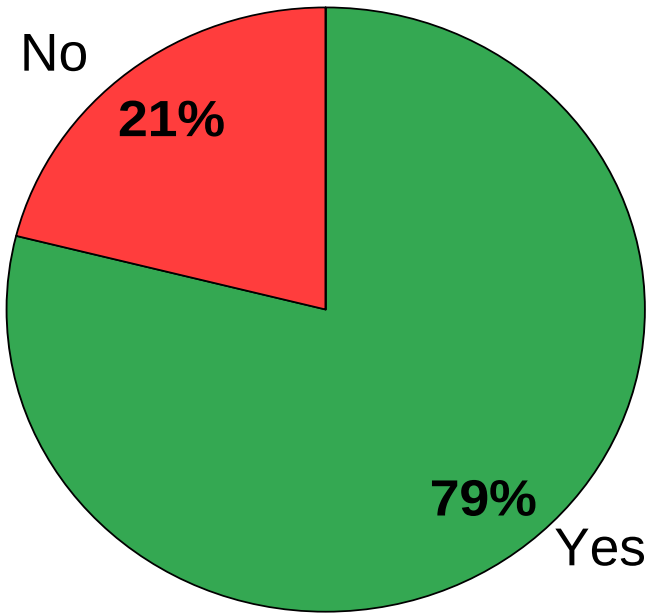


Base: All (1,044), 2004; All drivers (816), 2003

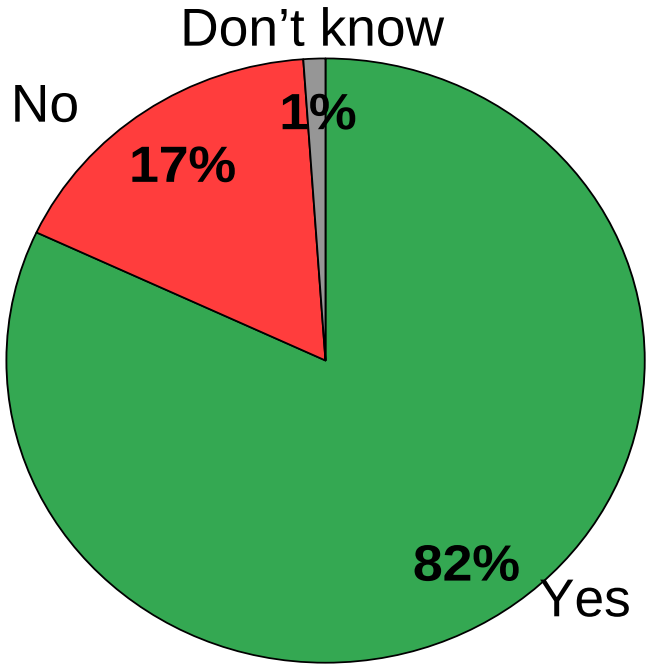
Registered Vehicle Keeper

QC2 Are you the registered vehicle keeper of the car/light van you drive/motorcycle you ride most often?

2003



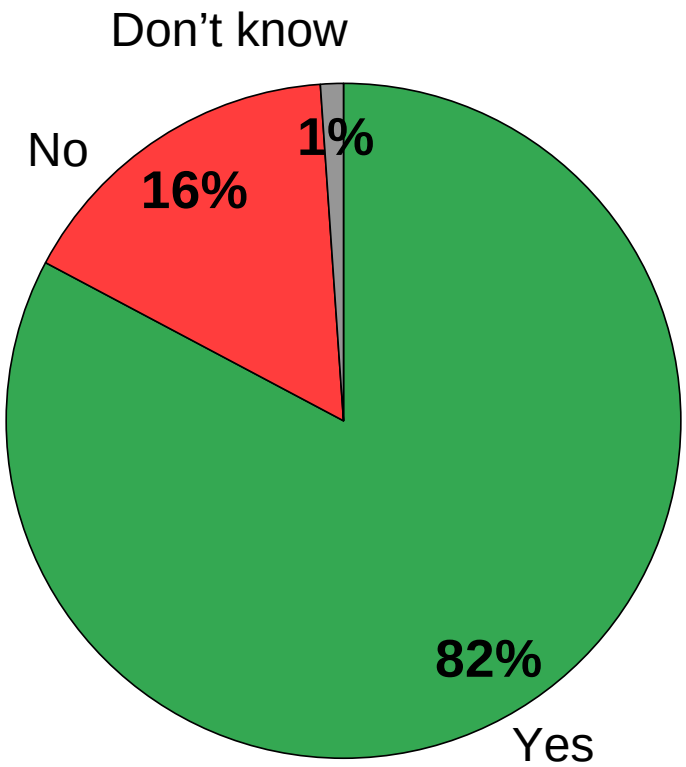
2004



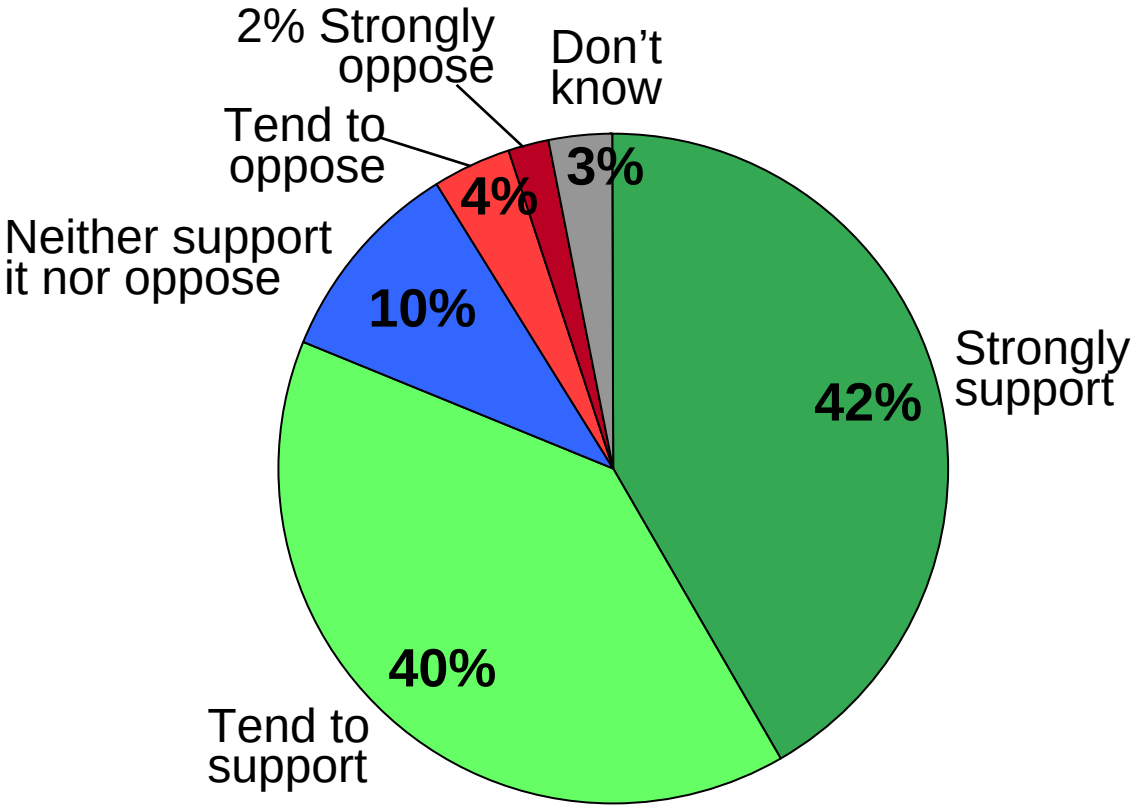
Base: All (1,044), 2004; All drivers (816), 2003

New Vehicle Registration and Licensing System

QC3 Are you aware or not of the new vehicle registration and licensing system?



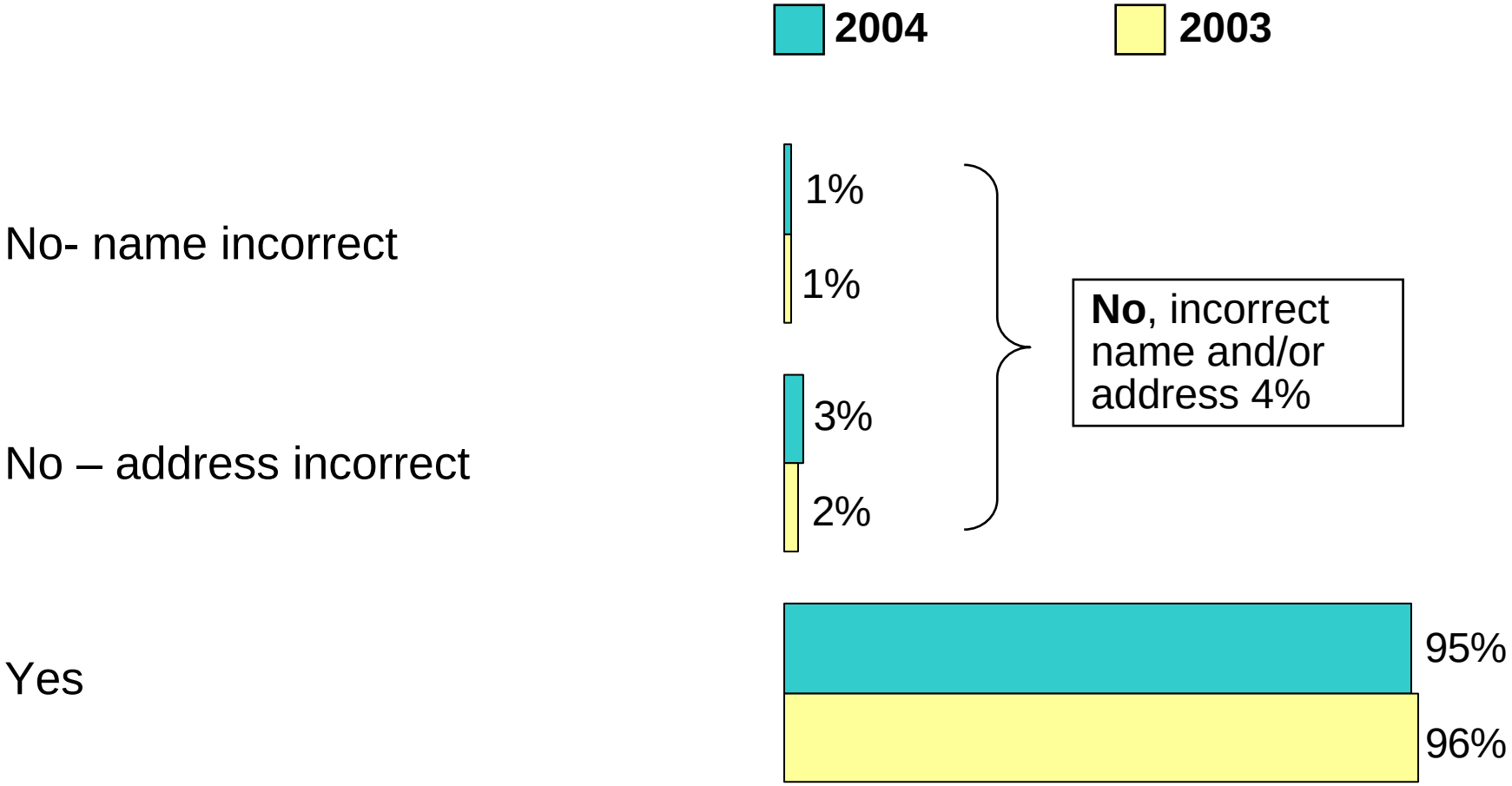
QC4 To what extent, do you support or oppose the new vehicle registration and licensing system



Base: All (1,044)

Up-to-date Details on Logbook

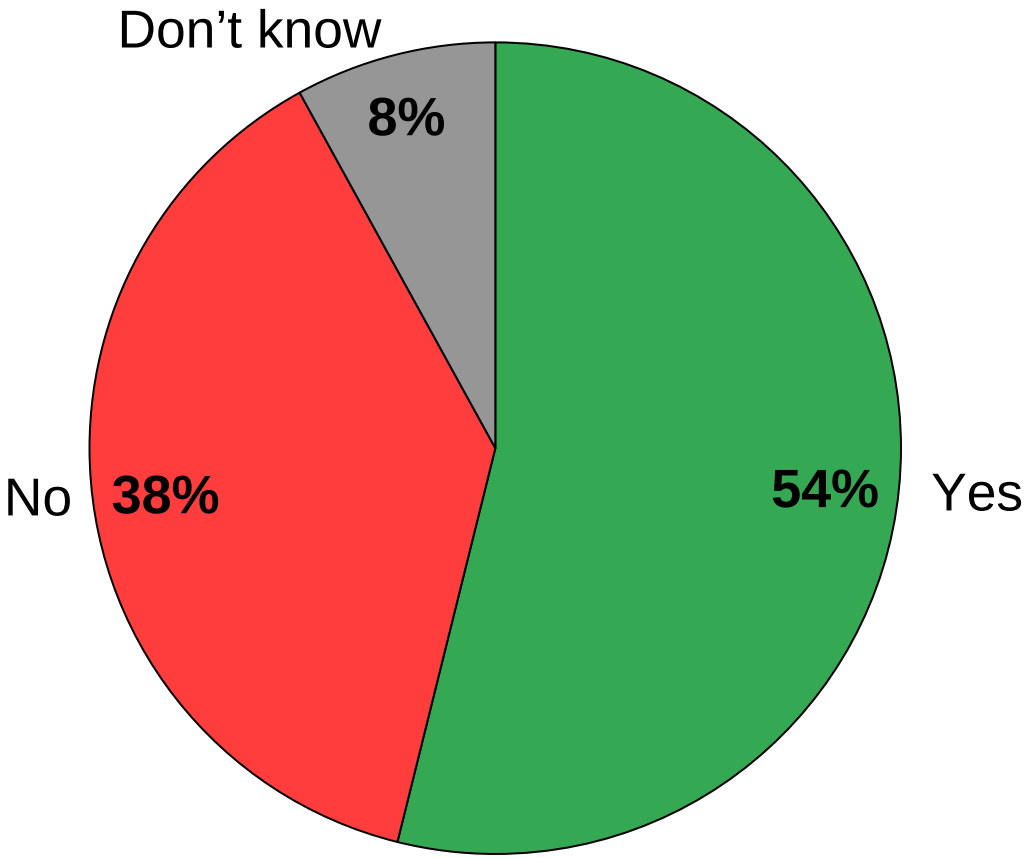
QC5 Can you tell me, are your name and address in your logbook up to date?



Base: All registered vehicle keepers (862), 2004; (643), 2003

New Style Logbook

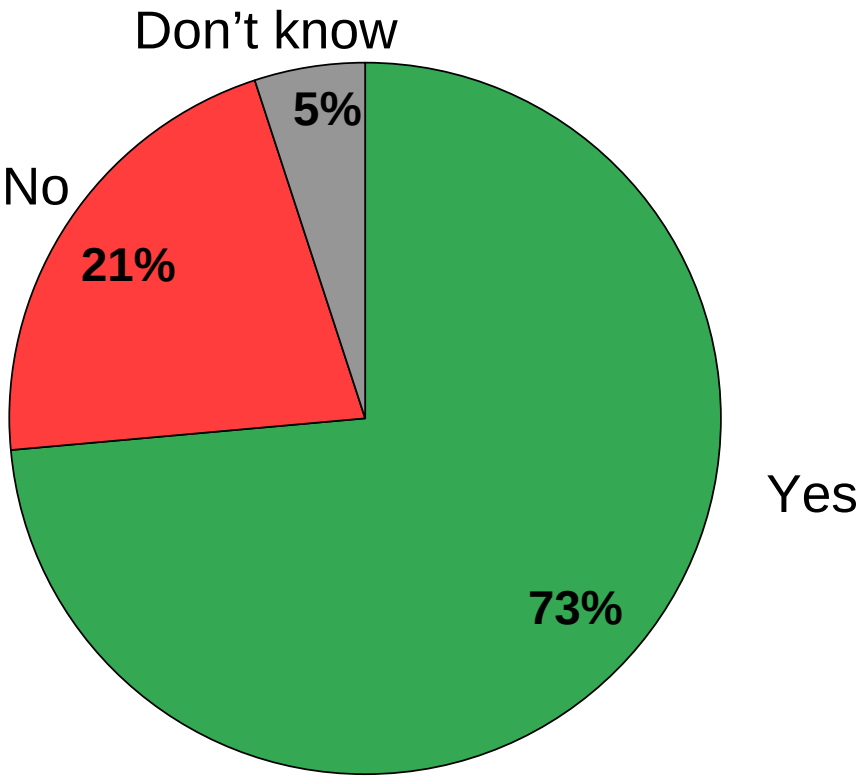
QC7 Have you received a new style logbook (the V5C Registration Certificate) since January this year?



Base: All registered vehicle keepers (862)

Destroying Old Logbook

QC9 Did you understand that you were required to destroy your old logbook?



QC10 Have you destroyed your old logbook?

All who understood they were required to destroy logbook:
71% Yes
26% No
3% Don't know
Base: (289)

Base: All who read the literature that came with V5C (323)

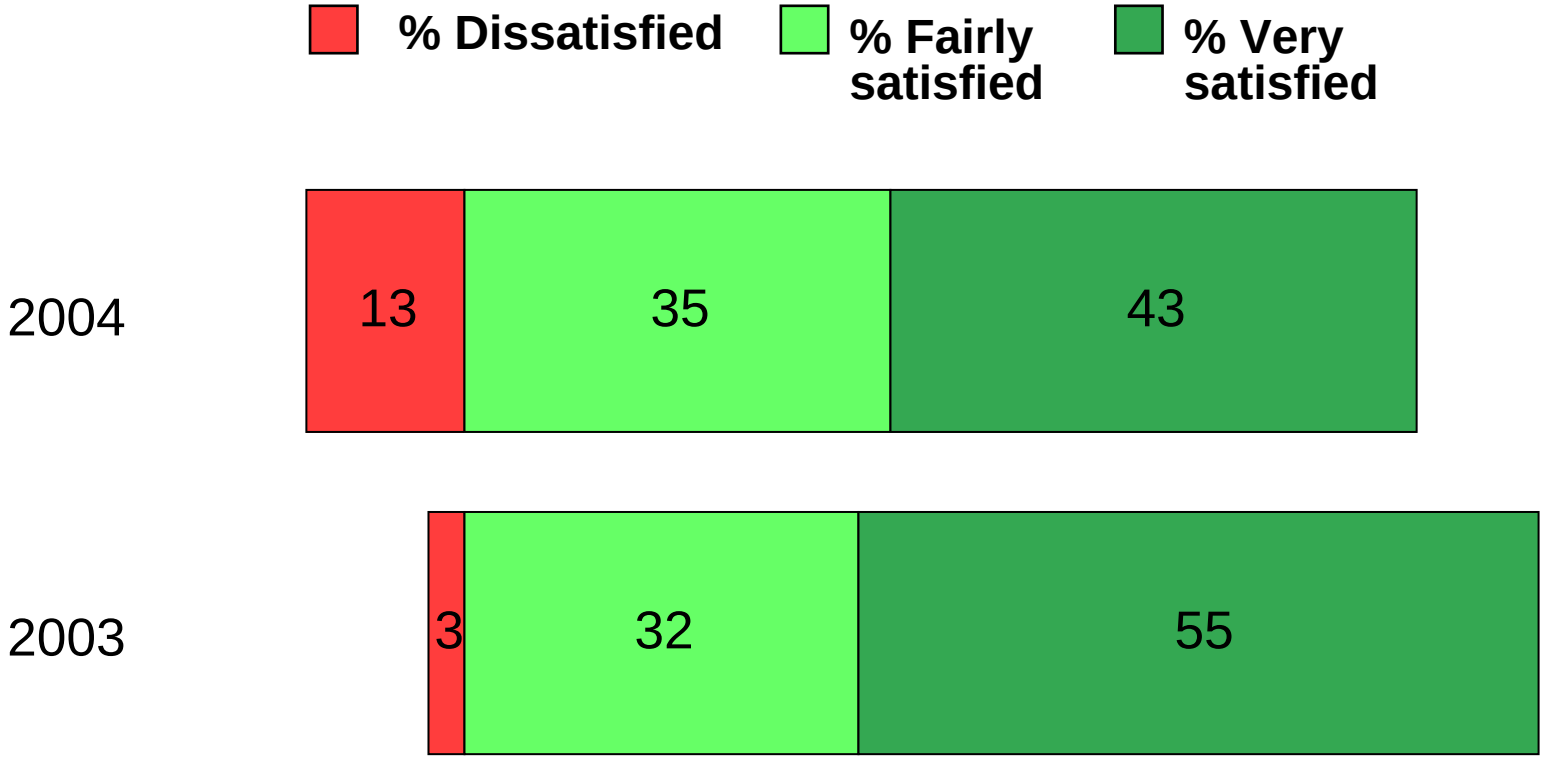
Road Tax

Road Tax - Summary

- **Satisfaction with the service received when buying a tax disc has fallen** since 2003.
- **More than half of all private motorists say they are likely to use Direct Debit to pay for their tax disc** (54% including 28% 'very likely').
- Compared to 2003, **a slightly lower proportion of private motorists say they are 'very likely' to use a facility whereby they could choose the start and expiry date of their road tax** (22% compared to 26% a year ago).
- **Two in five motorists buy their road tax up to a week or two before the old one runs out**. A quarter buy it just one or two days before it is due.
- The main reason why people buy their tax disc in advance is because they worry that if they fail to act on a reminder they will forget to renew their tax disc.
- There is a **high level of awareness of the new road tax rules,** with four in five motorists aware of the rules. **Support for the new road tax rules is also very high** (80% support).
- People have **mixed views with regard to reporting an untaxed vehicle.**

Satisfaction with Buying Tax Discs

QB1c How satisfied or dissatisfied were you with the service you received when you bought a tax disc?



Base: All who have bought a tax disc in the last 12 months (704), 2004; All drivers who have bought a tax disc in the last 12 months (634), 2003

Reasons for Dissatisfaction with Buying Tax Discs

I have to go to a main Post Office and they are closing them down. I wish [I could send a cheque and they would send] you the disc when it's due.

I did not receive a reminder from the DVLA.

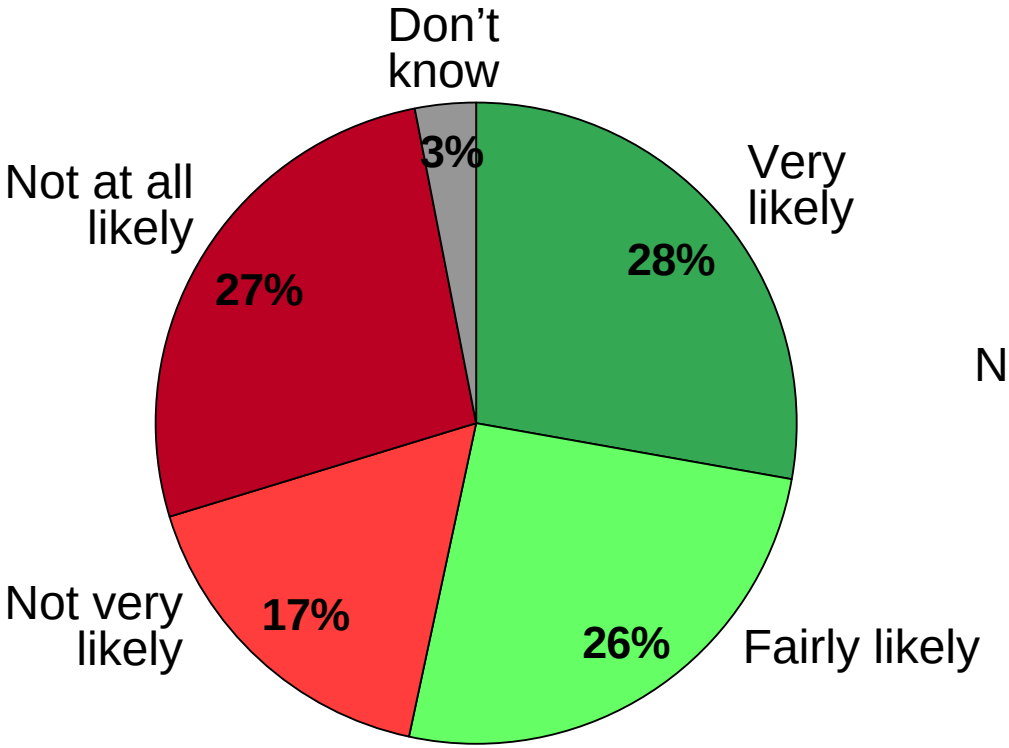
It's too expensive.

I had to go to the Post Office with a big long queue. It should be web-based.

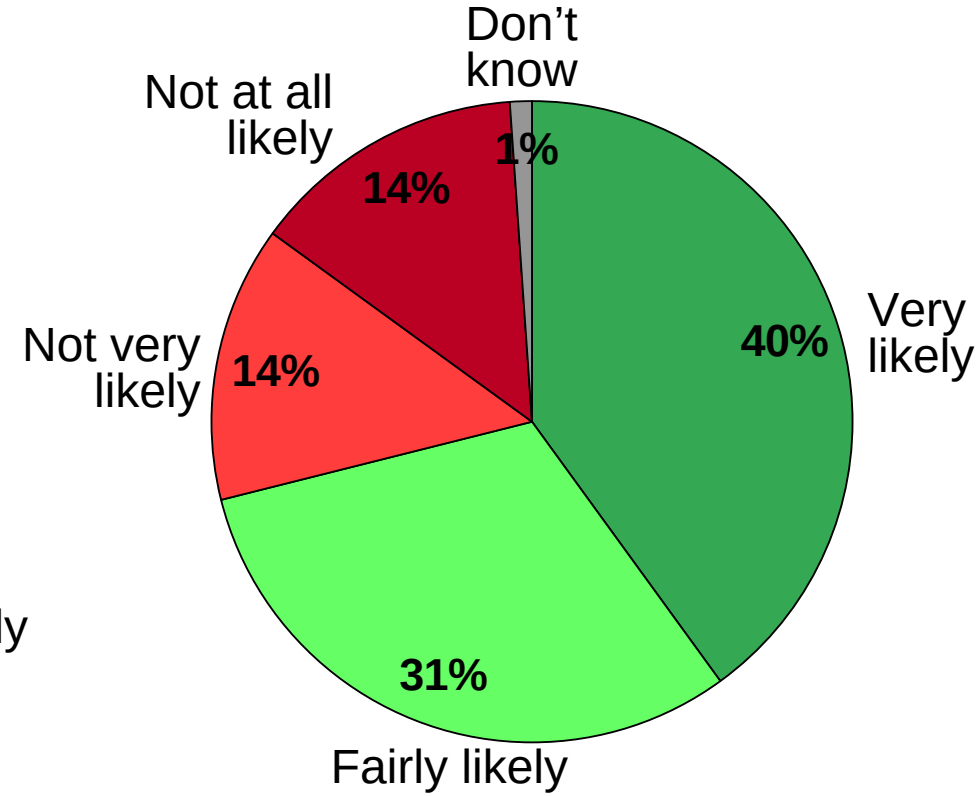
Using Direct Debit to Pay for Tax Discs

QD5 How likely, if at all, would you be to use Direct Debit [to pay for tax disc]?

All private motorists



All who pay for TV licence by Direct Debit

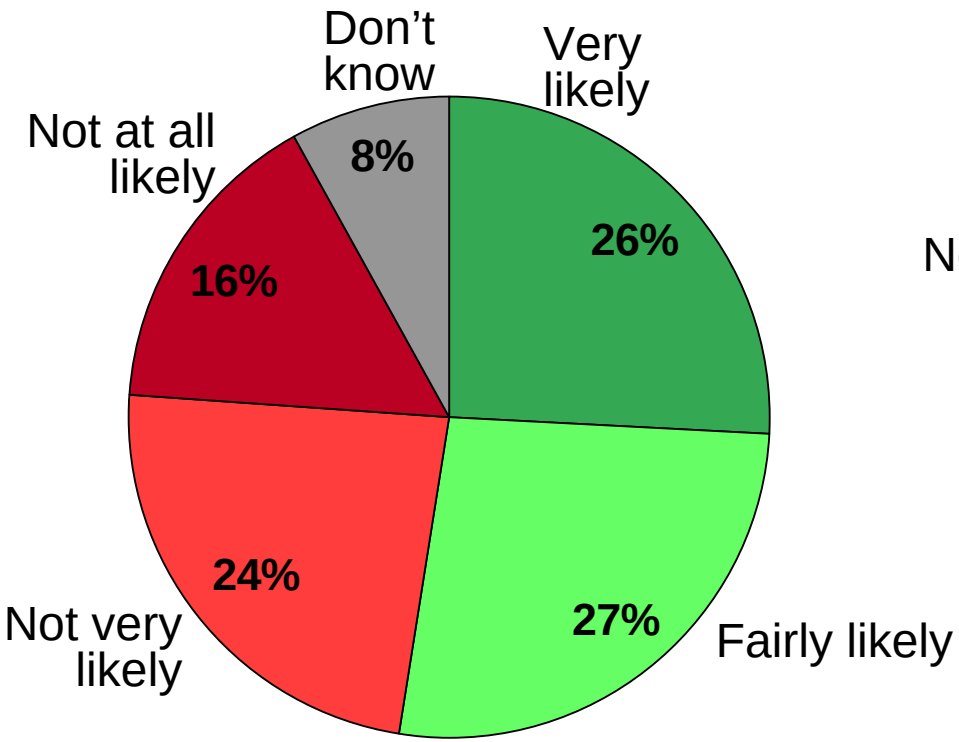


Base: All (1,044)
Base: All who pay for TV licence by Direct Debit (579)

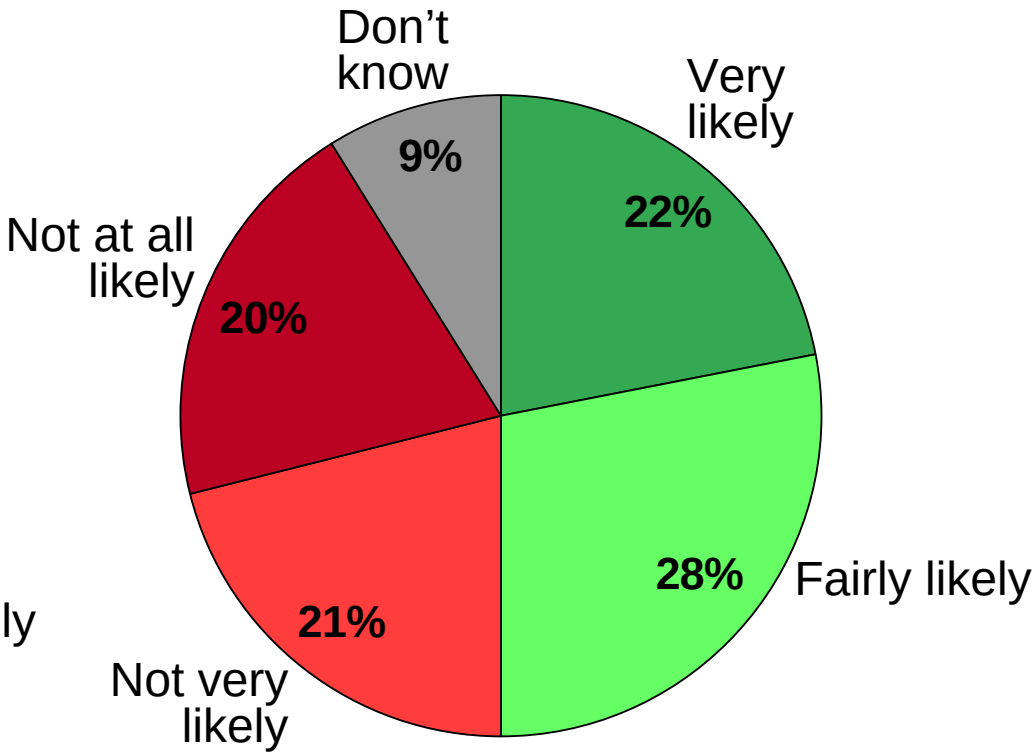
Start and Expiry Date on Tax Discs

QD7 If a facility were available which allowed you to choose the exact start date and expiry date of your road tax, how likely, if at all, would you be to use it?

2003



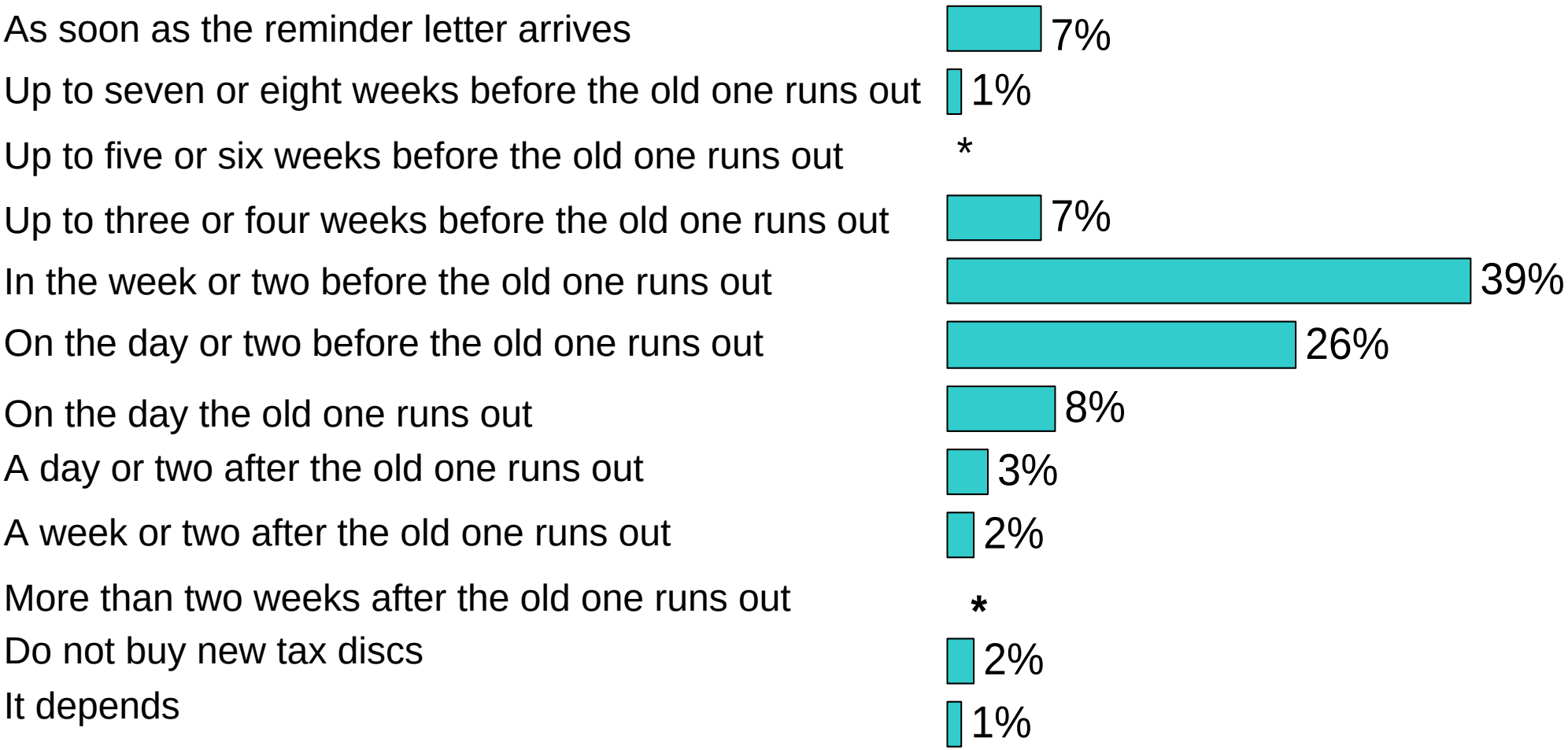
2004



Base: All (1,044), 2004
Base: All drivers (816), 2003

Purchasing a New Tax Disc

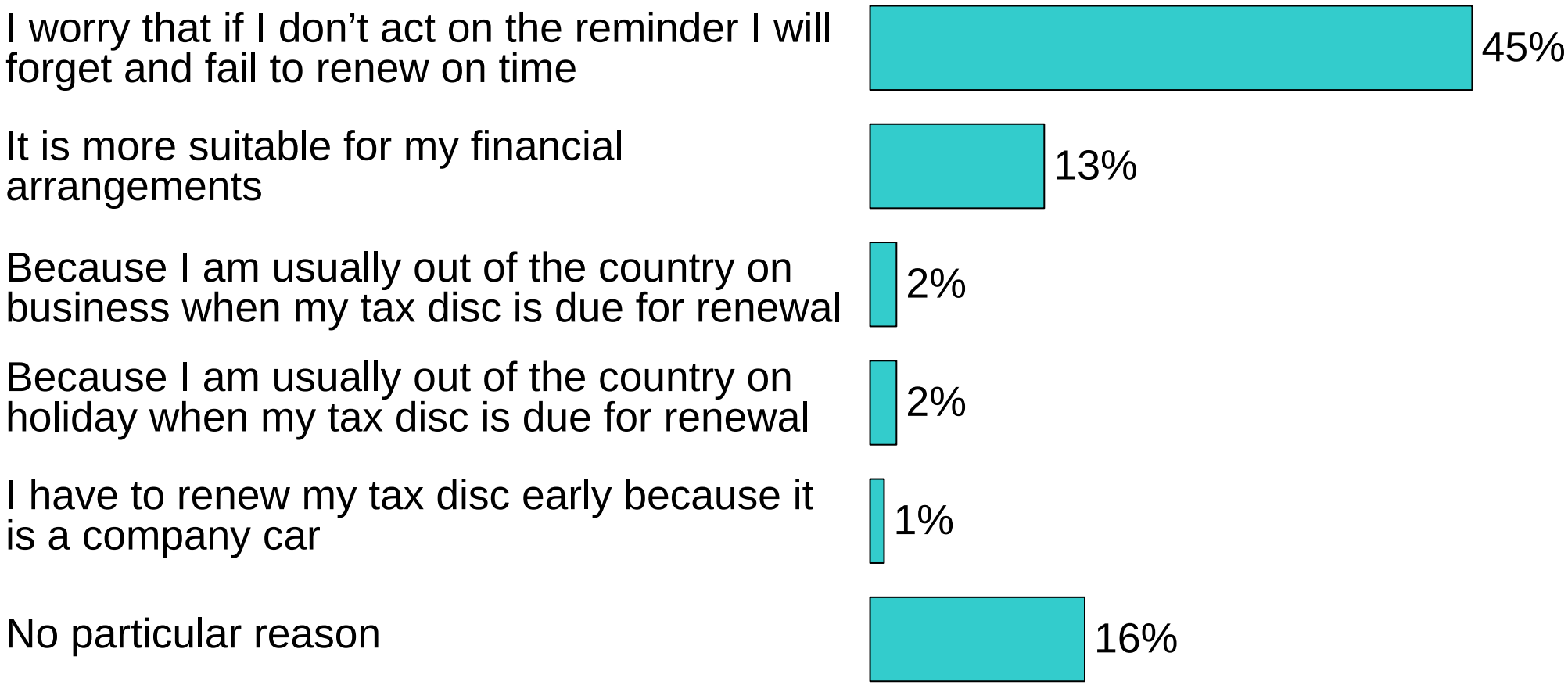
QD1 How long before your road tax expires do you normally buy a new tax disc?



Base: All (1,044), 2004

Reasons for Renewing a Tax Disc in Advan

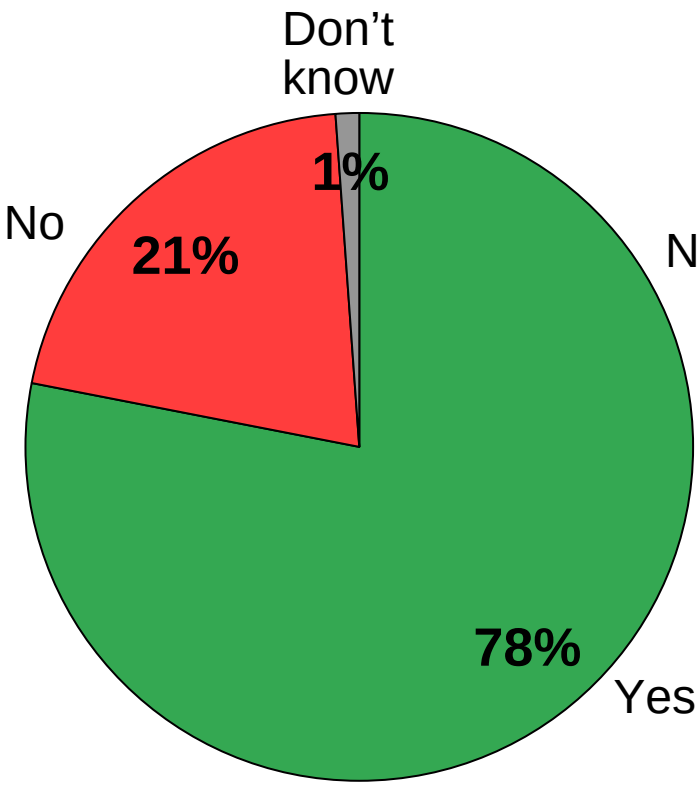
QD2 For what reasons, if any, do you renew your tax disc?



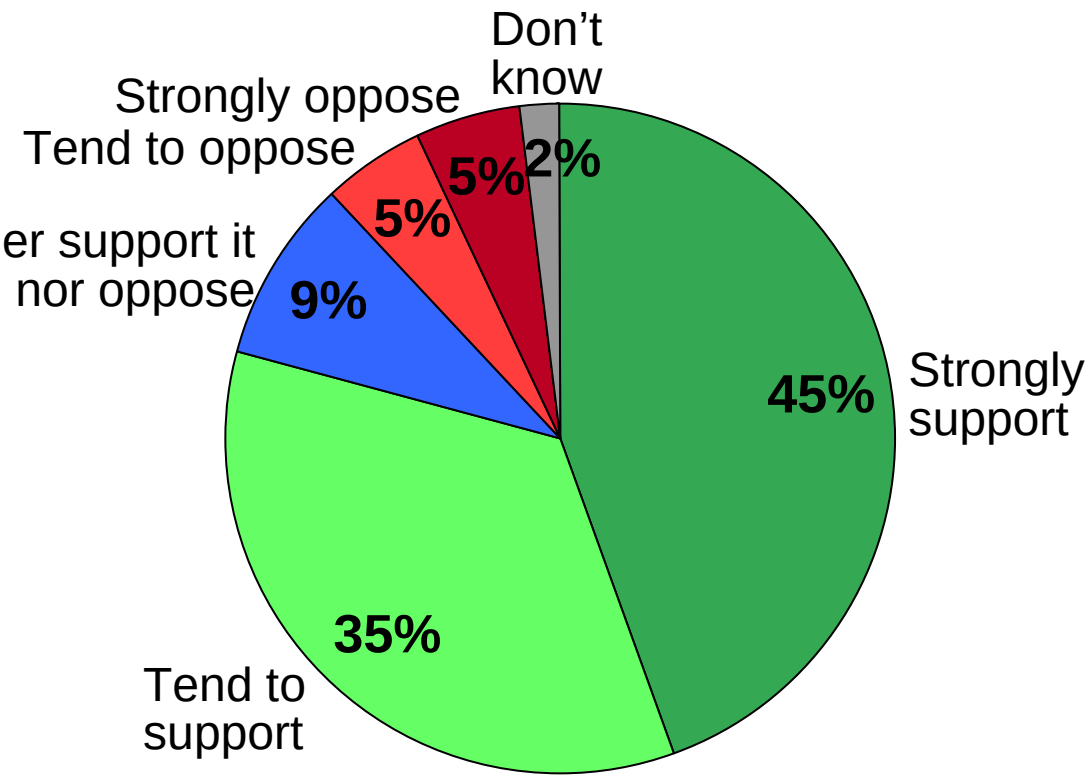
Base: All answering who buy a new tax disc at least five weeks in advance (61)

New Road Tax Rules

QD10 Are you aware or not of the new road tax rules?



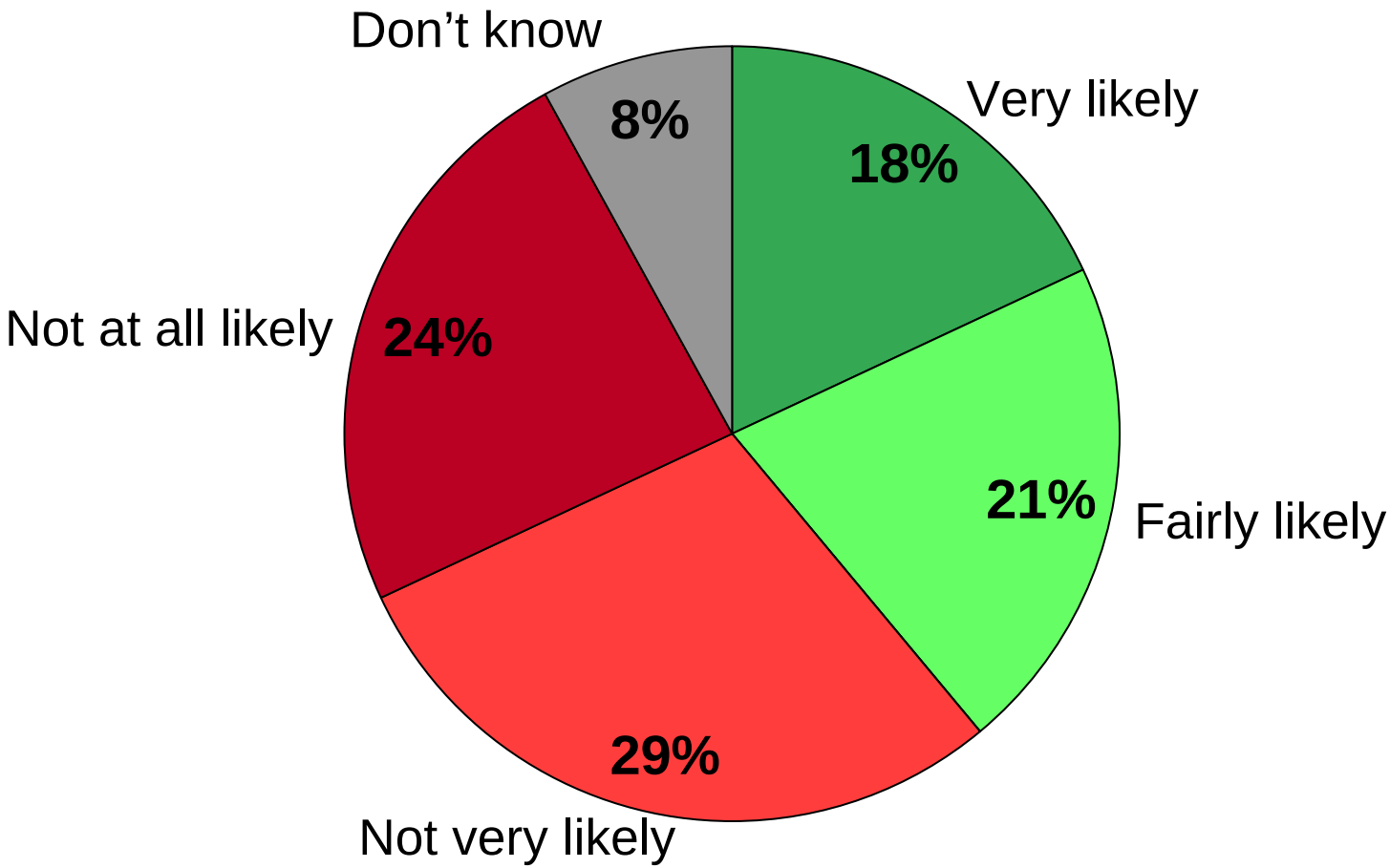
QD11 To what extent, do you support or oppose the new road tax rules?



Base: All (1,044), 2004

Reporting an Untaxed Vehicle - 1

QD9a If you were aware of an untaxed vehicle, how likely, if at all, would you be to report this?

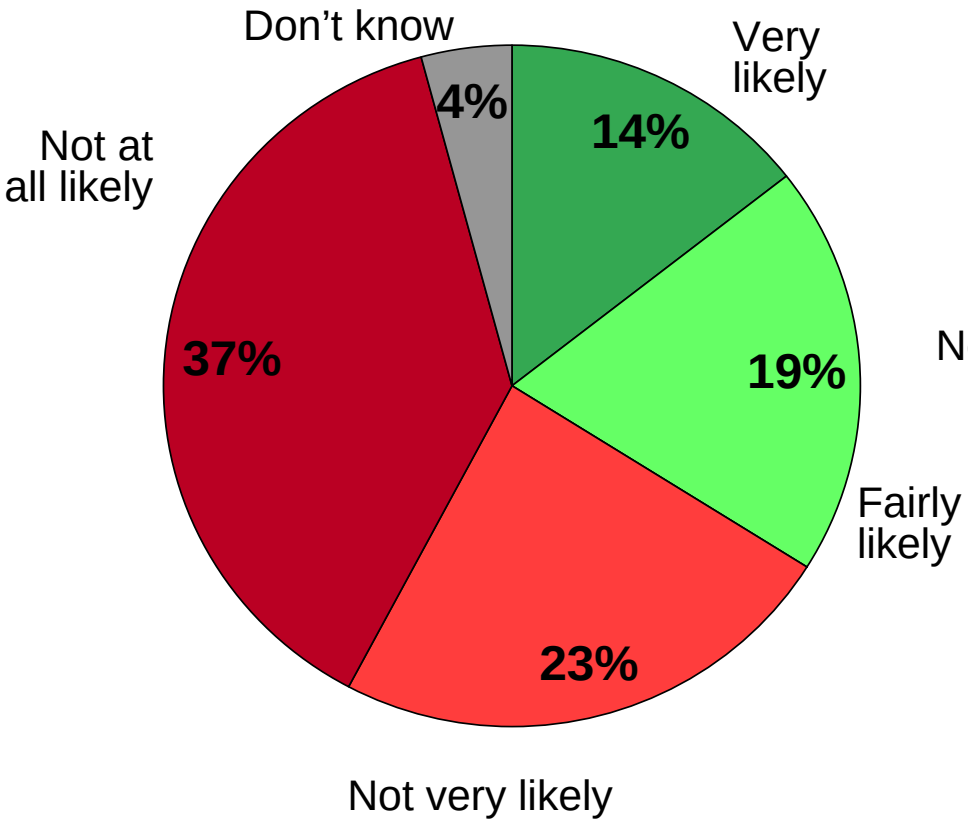


Base: All (1,044), 2004

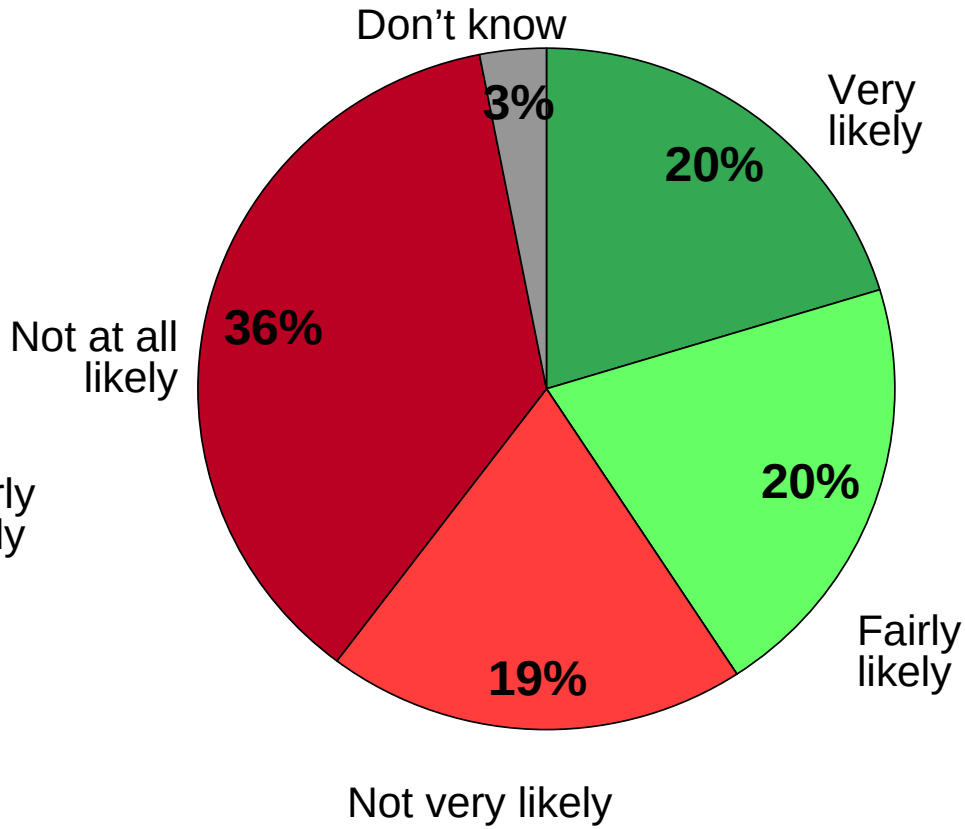
Reporting an Untaxed Vehicle - 2

QD9b If you were to report an untaxed vehicle, how likely, if at all, would you be to use a government website to do this?

All who are very, fairly or not very likely



All who are very or fairly likely



Base: All who are very, fairly or not very likely to report an untaxed vehicle (715); All who are very or fairly likely (410)

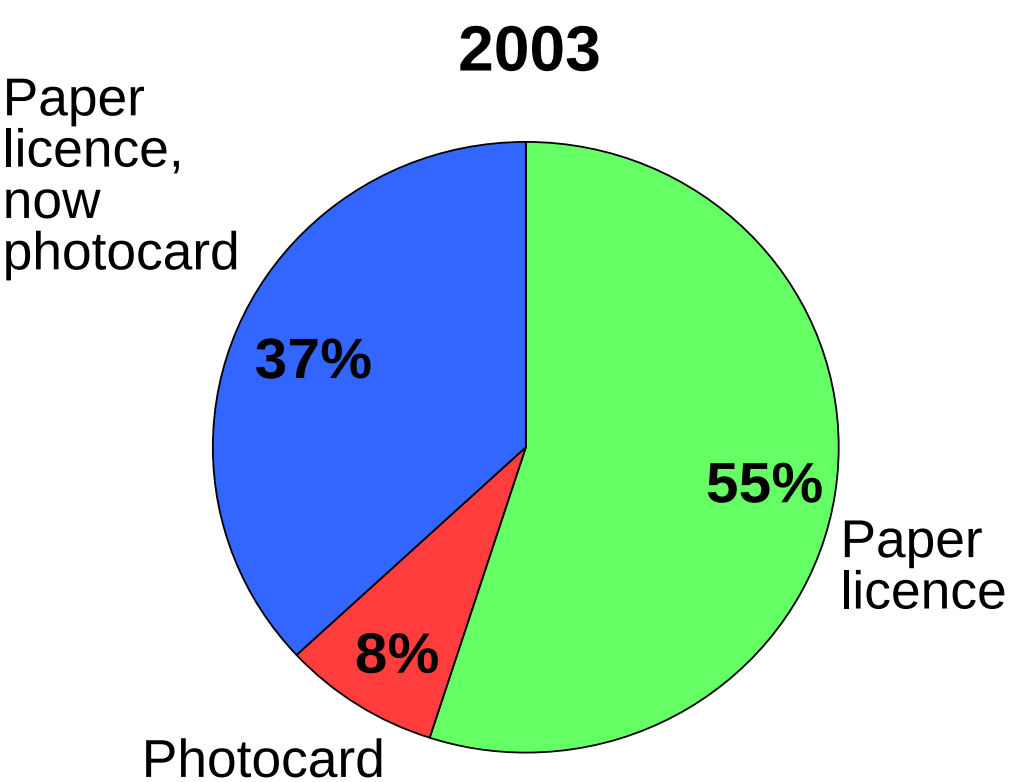
Driving Licences

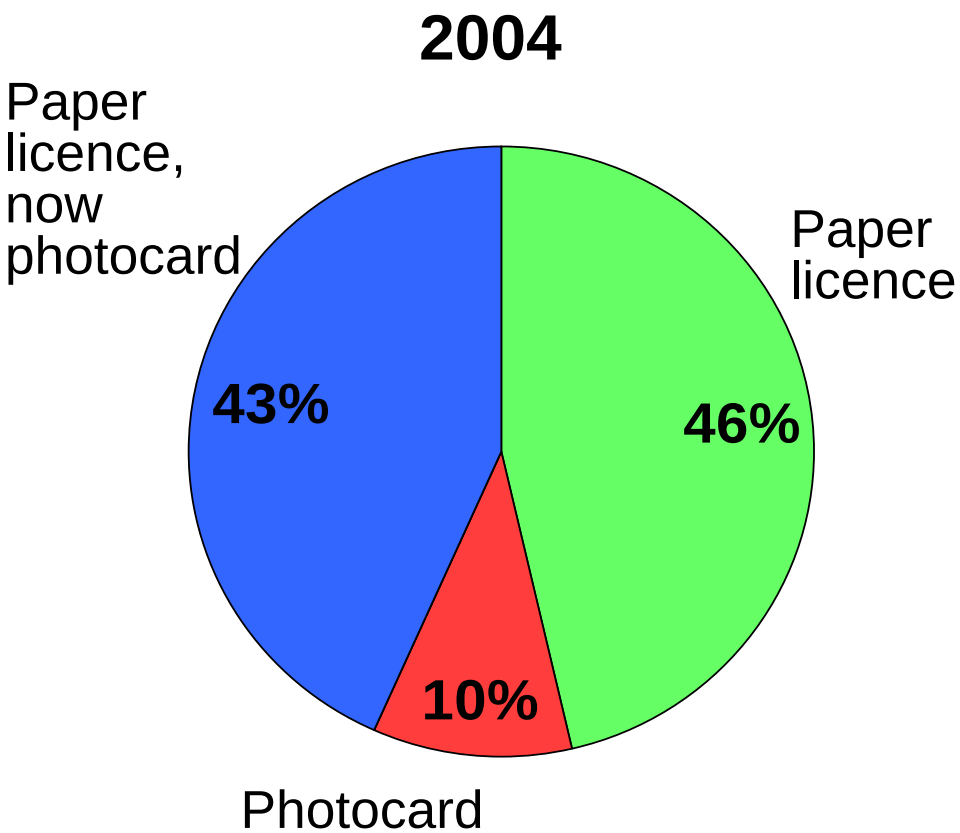
Driving Licences - Summary

- The **proportion of motorists who have a photocard licence has increased since 2003**. However, nearly half of all private motorists still have a paper licence (46%).
- **Three in five motorists would support the abolition of the paper counterpart** of the photocard licence, rising to two-thirds of photocard holders.
- **Satisfaction with applying for a replacement driving licence has fallen significantly** since 2003.
- Around **half of all motorists who are aware that the photocard comes with a paper counterpart keep the two parts separately, but can easily find them both**.
- **Nearly half of motorists would prefer their address not to be displayed** on the photocard licence, whilst a quarter either say it does not matter or that they would prefer it to be displayed.
- The **Post Office** and the **DVLA** are the most common places where motorists would look for **information about driving licences**. One in five would specifically use the DVLA web site.
- There is **the same level of support for biometric smartcard driving licences as there is for basic smartcard** licences (30% each).

Driving Licence Ownership

QE1 Do you have the older, paper driving licence or the newer photocard driving licence?

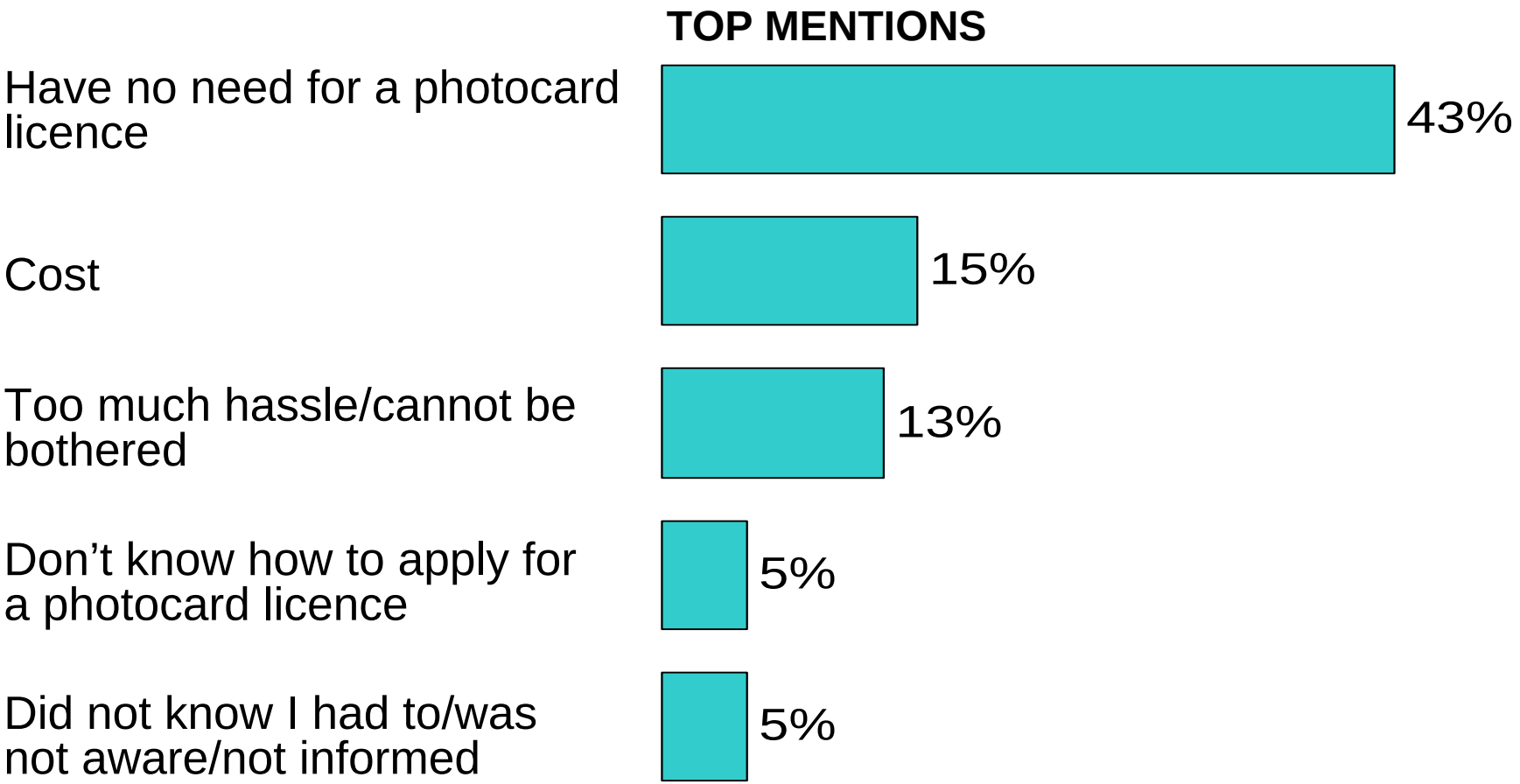




Base: All (1,044), 2004
Base: All drivers (816), 2003

Reasons for not Replacing Paper Licence

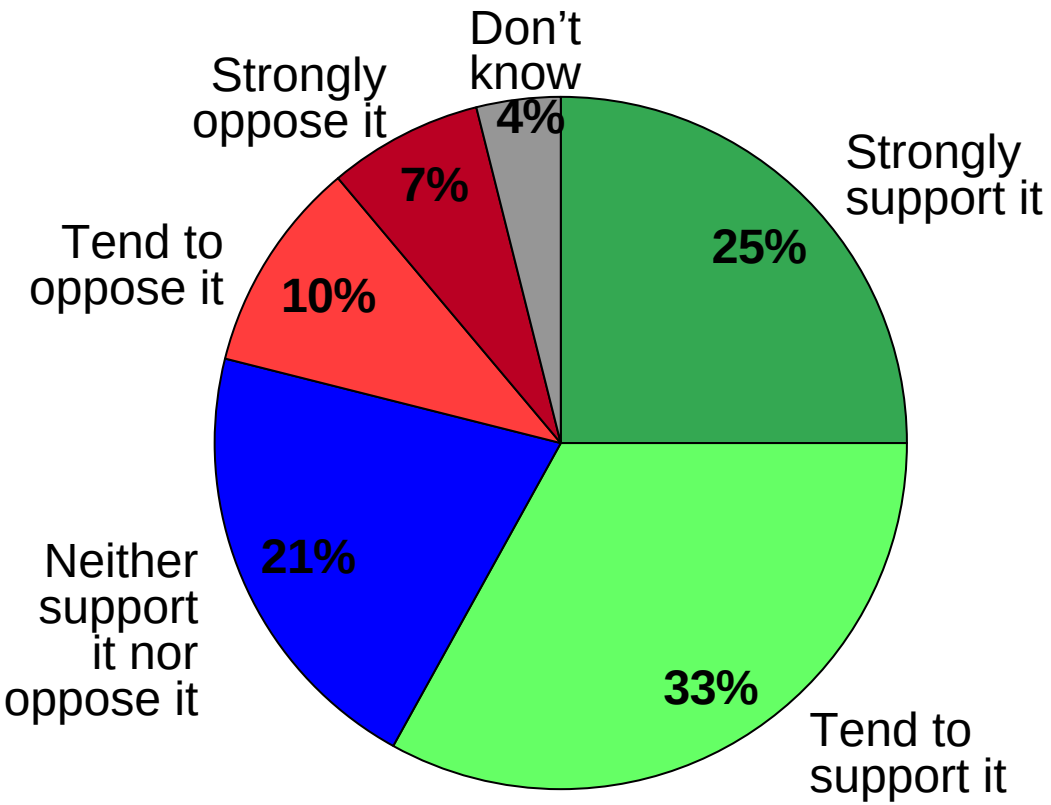
QE3 Why have you not replaced your paper licence with a photocard licence?



Base: All who have a paper licence (494)

Support for Abolition of Paper Counterpart

QE6 To what extent do you support or oppose the abolition of the paper counterpart?



Support Abolition:

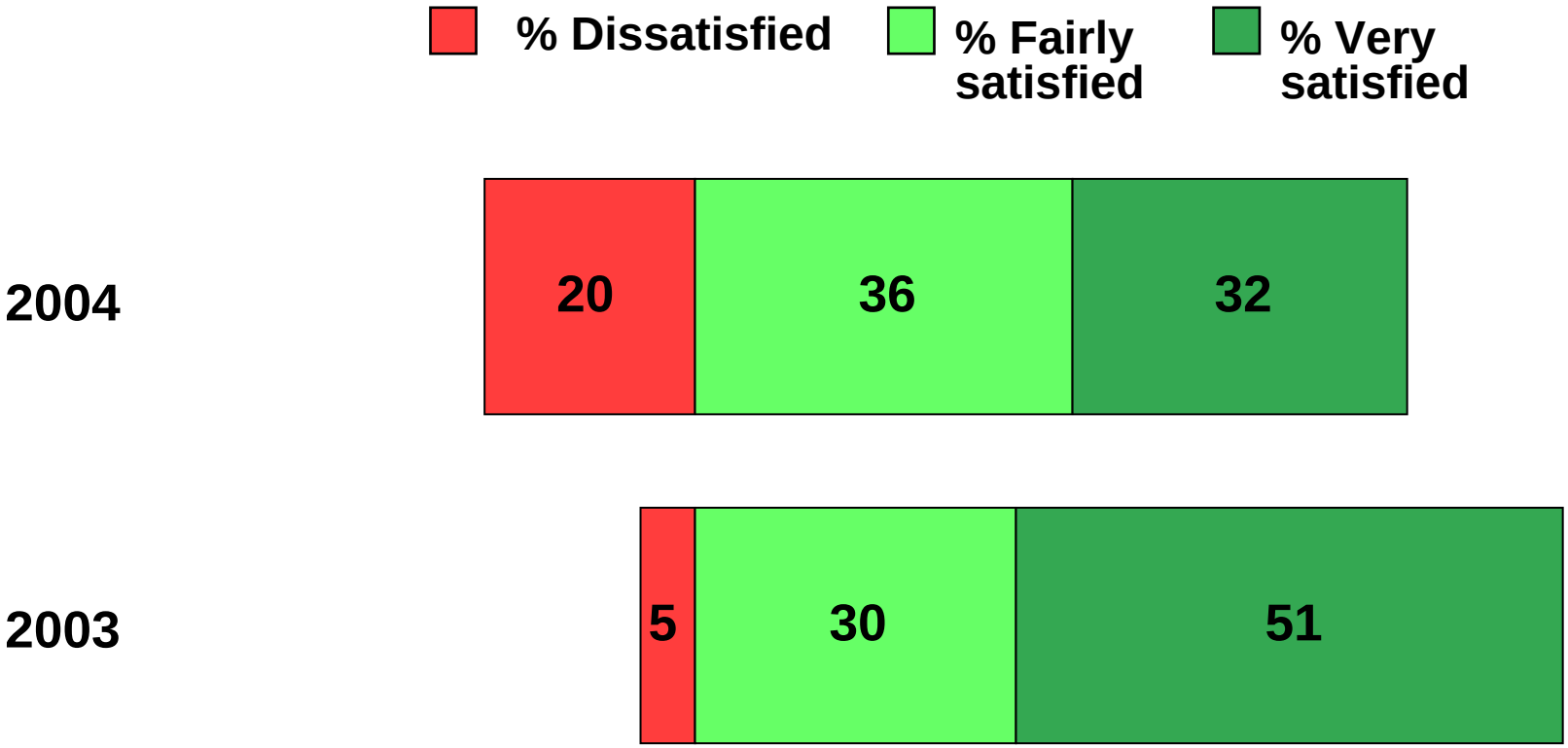
66% of photocard holders

48% of paper holders

Base: All (1,044); Photocard holders (545); Paper holders (494)

Satisfaction with Applying for Replacement Licences

QB1c How satisfied or dissatisfied were you with the quality of service you received when you applied for a replacement driver licence?



Base: All who have applied for a replacement driving licence in the last 12 months (91), 2004; All drivers who have applied for replacement driver documentation following change in name/address/vehicle in the last 12 months (113), 2003

Reasons for Dissatisfaction with Applying for a Replacement Driving Licence

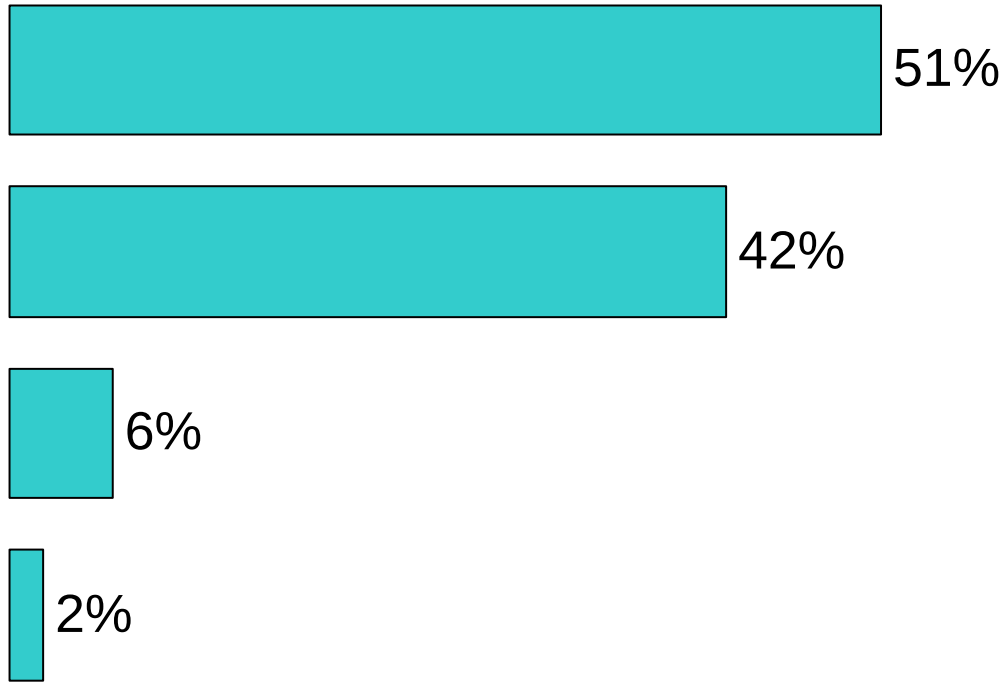
The forms were so complicated I didn't send everything I needed to, it was a real hassle.

Not being able to find out who to contact. Being padded from pillar to post by the various agencies.

You have to send off the original documents, birth certificate and passport. I'm not happy to send originals. I couldn't do it from the Post Office as I have a German passport.

Photocard Licence and Paper Counterpart

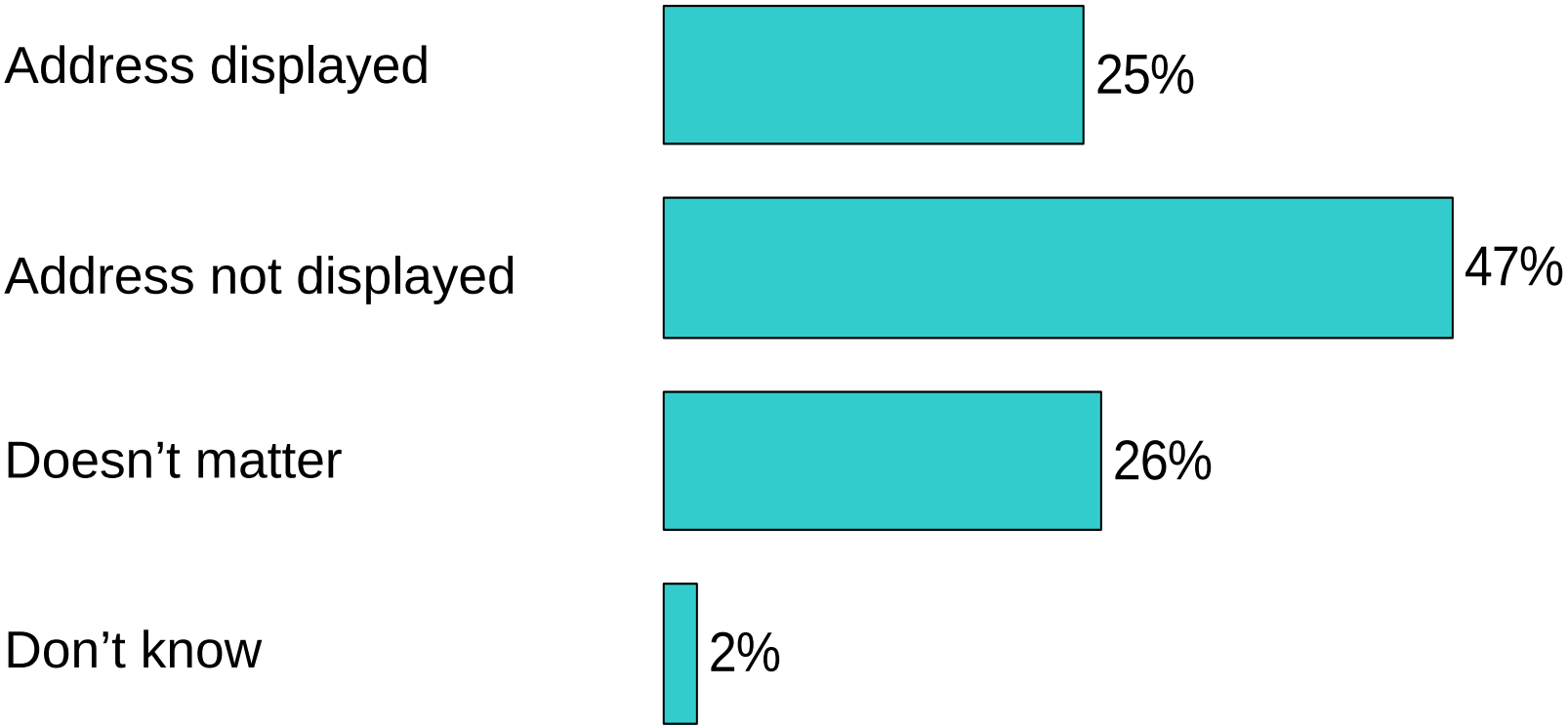
QE5 From this card, please can you tell me which of these applies to your photocard licence and the paper counterpart?



Base: All who are aware that the photocard comes with a paper counterpart (491)

Address Displayed on Photocard

QE9 The current photocard driving licence displays your address on the card itself. Would you prefer your address to be displayed or not to be displayed on the photocard?

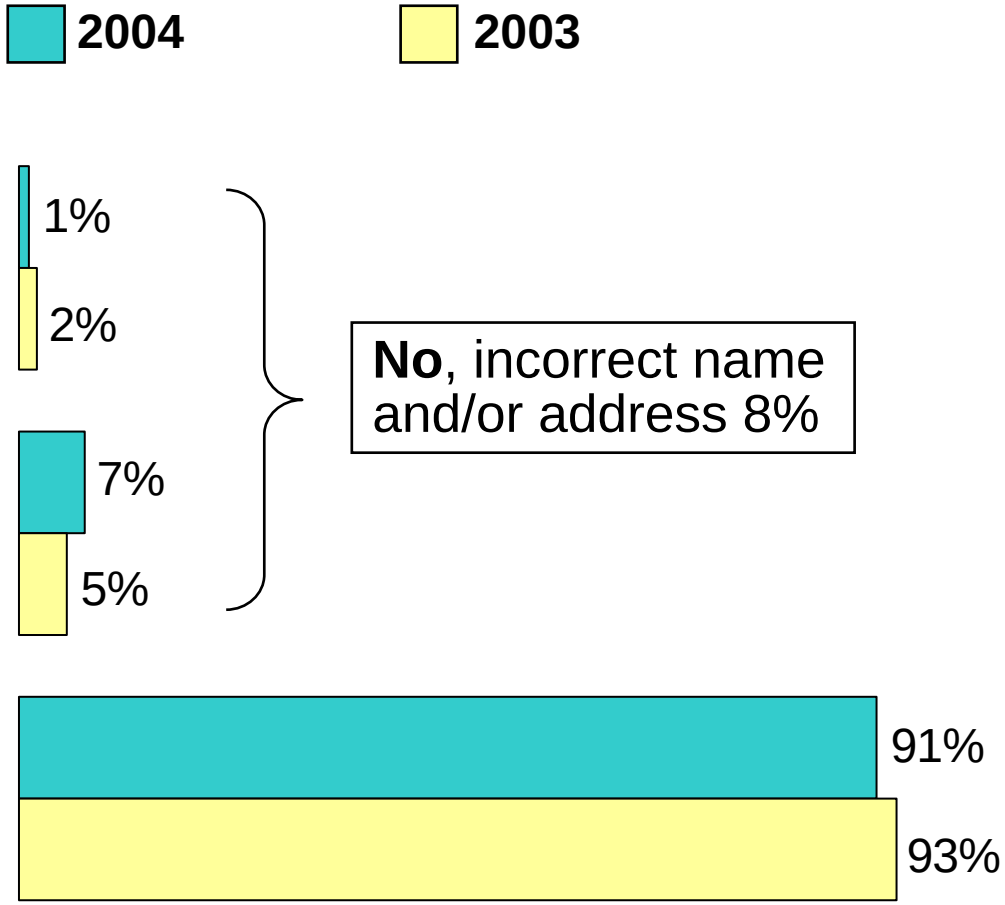


	Photocard	Paper	Male	Female
Address displayed	29%	20%	29%	20%
Address not displayed	40%	56%	41%	54%

Base: All (1,044)

Up-to-date Details on Driving Licence

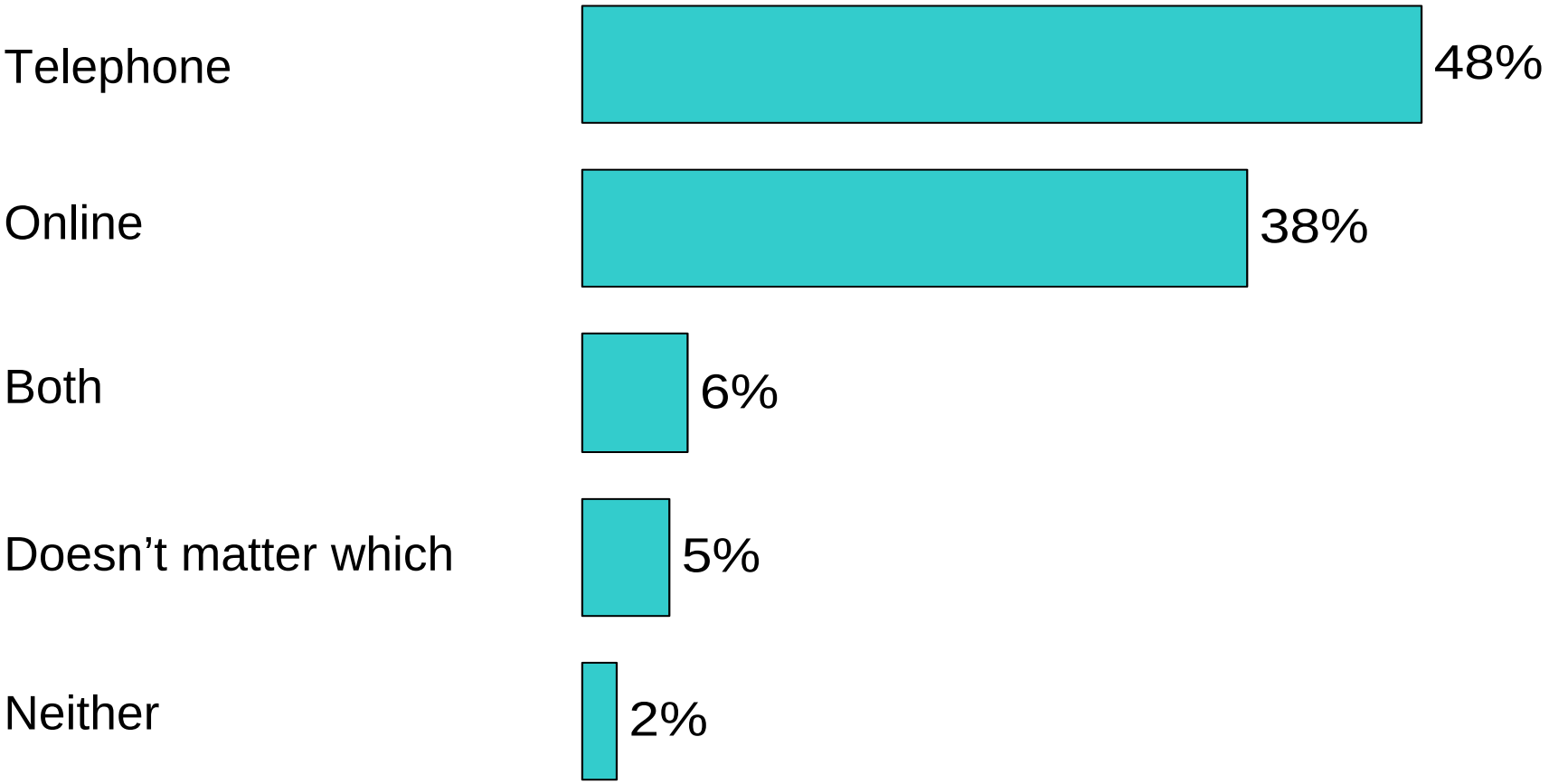
QE8 Can you tell me, are your name and address up-to-date on your driving licence?



Base: All (1,044), 2004; All drivers (816), 2003

Checking Driving Licence Details

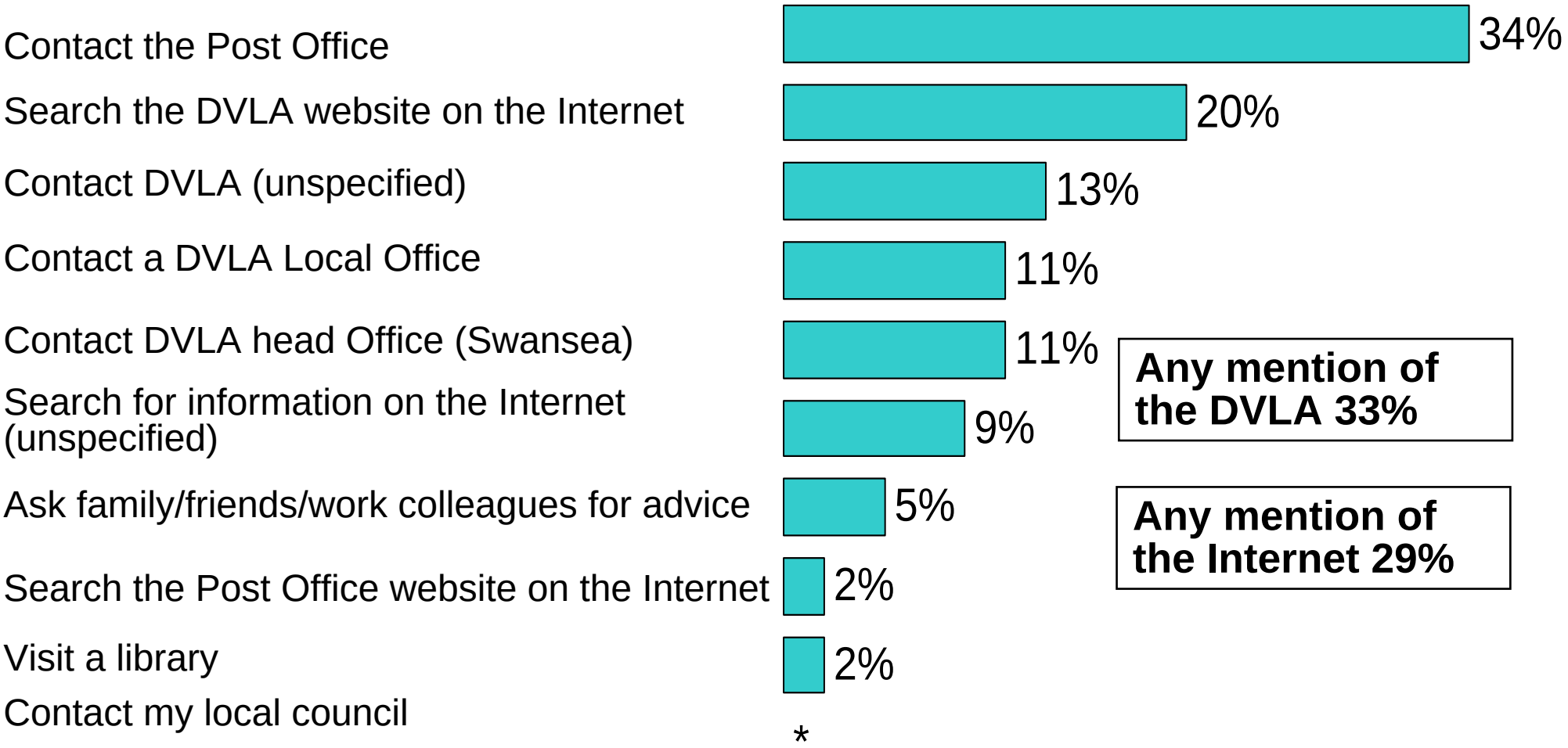
QE7 In the future, if you wanted to check your driving licence details, would you prefer to do this by telephone or use an online facility?



Base: All (1,044), 2004

Sources of Information about Driving Licences

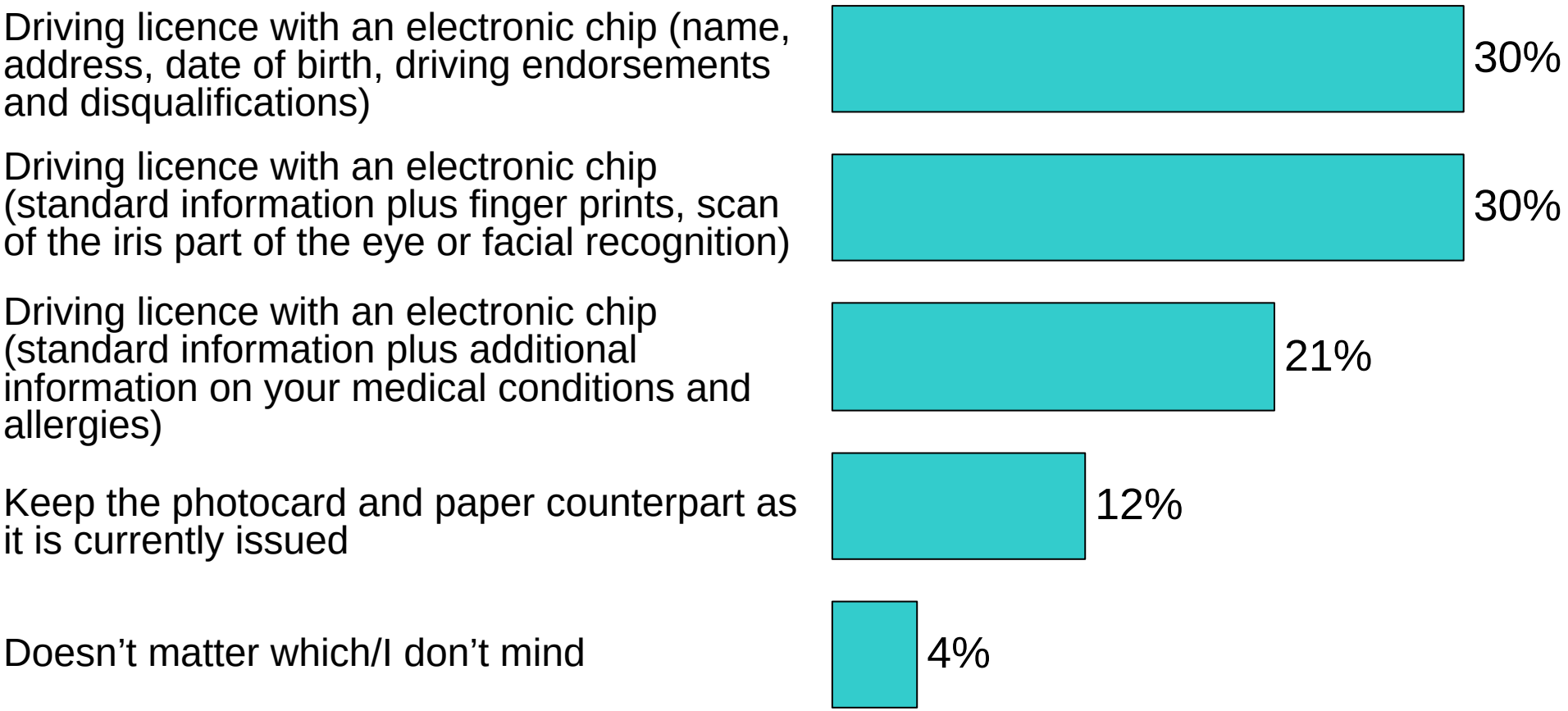
QE13 Where would you look for information about driving/motorcycle riding licences?



Base: All (1,044), 2004

Smartcard Driving Licence

QE12 In order to make driving licences more secure, a new style smartcard driving licence may be introduced in the future. From this list, can you tell me which one you would prefer?



Base: All (1,044), 2004

MOT Test

MOT Test - Summary

- **Satisfaction with the quality of service when getting an MOT has fallen** since 2003 (down 8%), although this transaction is still rated highly overall (81% satisfied).

- However, **satisfaction with specific MOT service elements has remained fairly consistent** with 2003. Motorists are most likely to be satisfied with the knowledge and helpfulness of the staff at MOT garages and the condition in which their vehicle is returned to them.

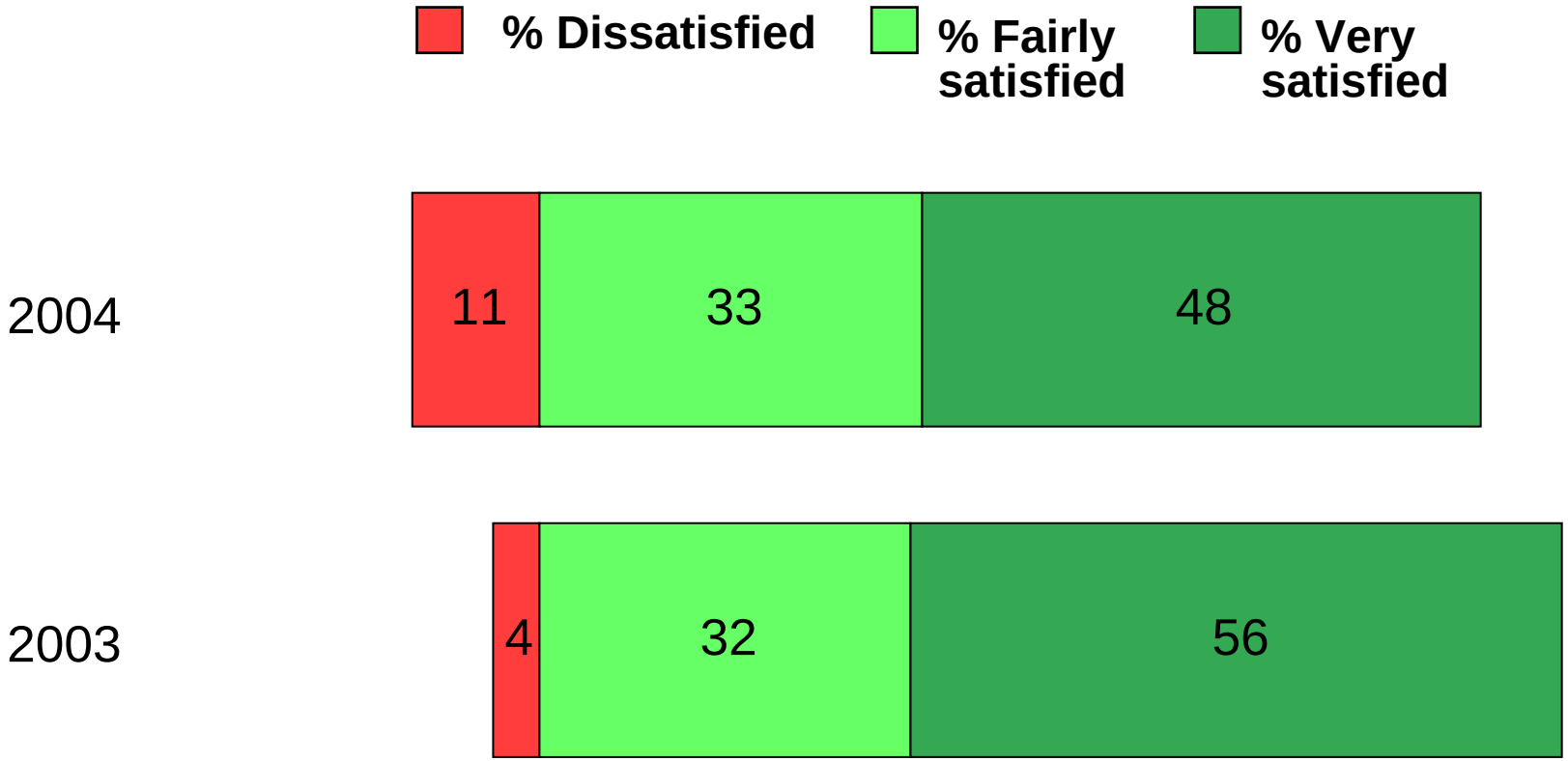
- **Overall satisfaction with the explanation people are given for an MOT failure has increased** since 2003. However, while three in five said they were 'very satisfied' in 2003, this has fallen to half in 2004.

- A **lower proportion of private motorists now have 'total confidence'** that their vehicle is roadworthy after passing an MOT (30% in 2004 versus 47% in 2003).

- Compared to 2003, the **same proportion of motorists (89%) say that they would find it useful to have a reminder of when their MOT test** is due. A **reminder by post** remains the most popular method of receiving it.

Satisfaction with MOT Test

QB1c How satisfied or dissatisfied were you with the quality of service you received when you took a car/light van/motorcycle to a garage for an MOT Test?



Base: All who have personally taken a vehicle for an MOT Test (541), 2004; All who have taken a car/light van to a garage for an MOT Test (460), 2003

Reasons for Dissatisfaction with the MOT Test

I went to one garage who tried to charge £700 for work needed to pass the MOT and then to a second one who was reputable and it cost me £120.

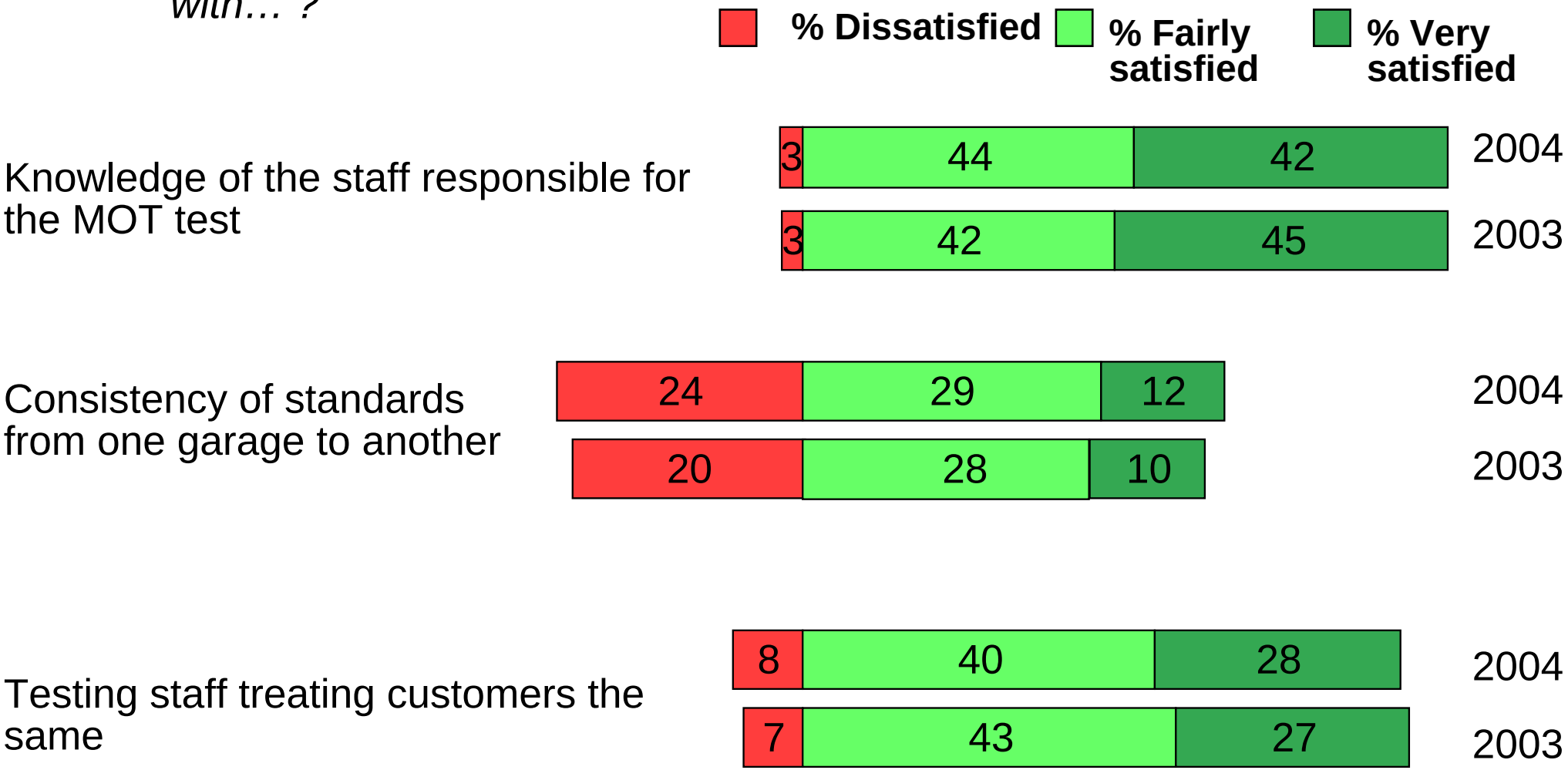
The garage did not check for a fault that I asked to be looked at before the MOT was carried out. It returned after the MOT with the fault.

They said it needed new tyres, but it never did. And they put the wrong date on the MOT Certificate.

Such bad service, it took longer than they said it would

Satisfaction with Aspects of MOT Test - 1

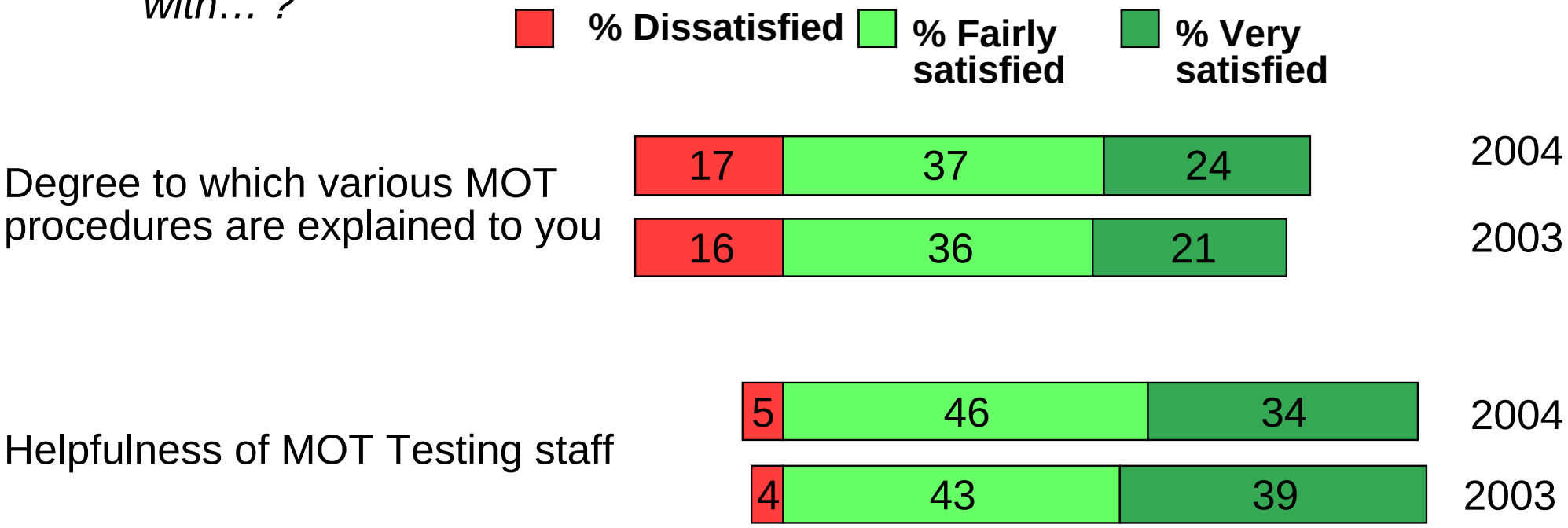
QF1 Thinking about MOT testing generally, how satisfied or dissatisfied are you with… ?



Base: All who have personally taken a vehicle for an MOT Test (541), 2004; All (1,012) MOT Survey, 2003

Satisfaction with Aspects of MOT Test - 2

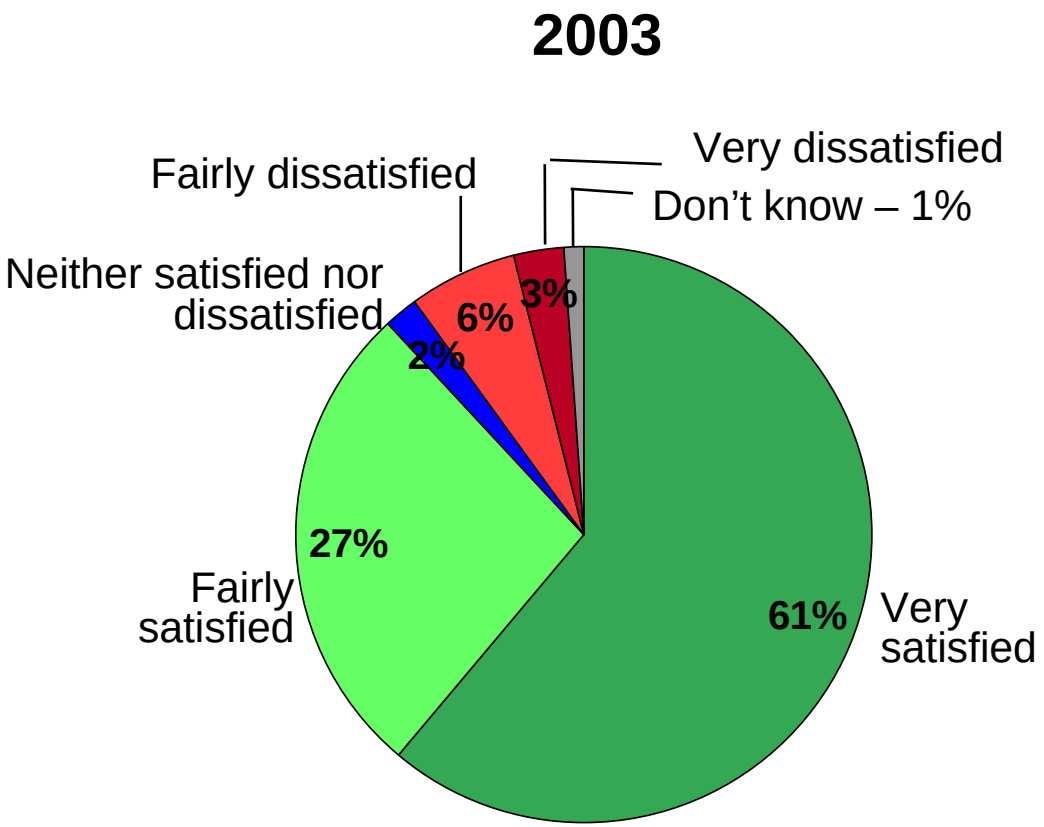
QF1 Thinking about MOT testing generally, how satisfied or dissatisfied are you with… ?

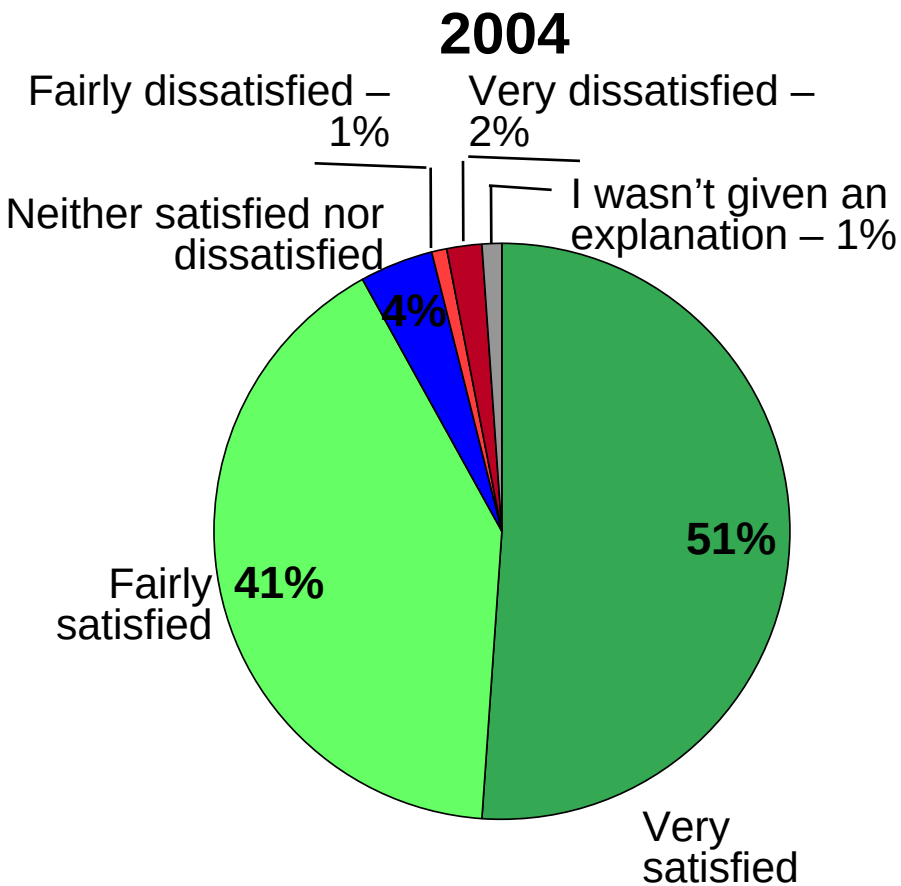


Base: All who have personally taken a vehicle for an MOT Test (541), 2004; All (1,012) MOT Survey, 2003

Satisfaction with Explanation for MOT Failure

QF3 How satisfied or dissatisfied are you that you were given a clear explanation of the reasons why your vehicle failed the Test?

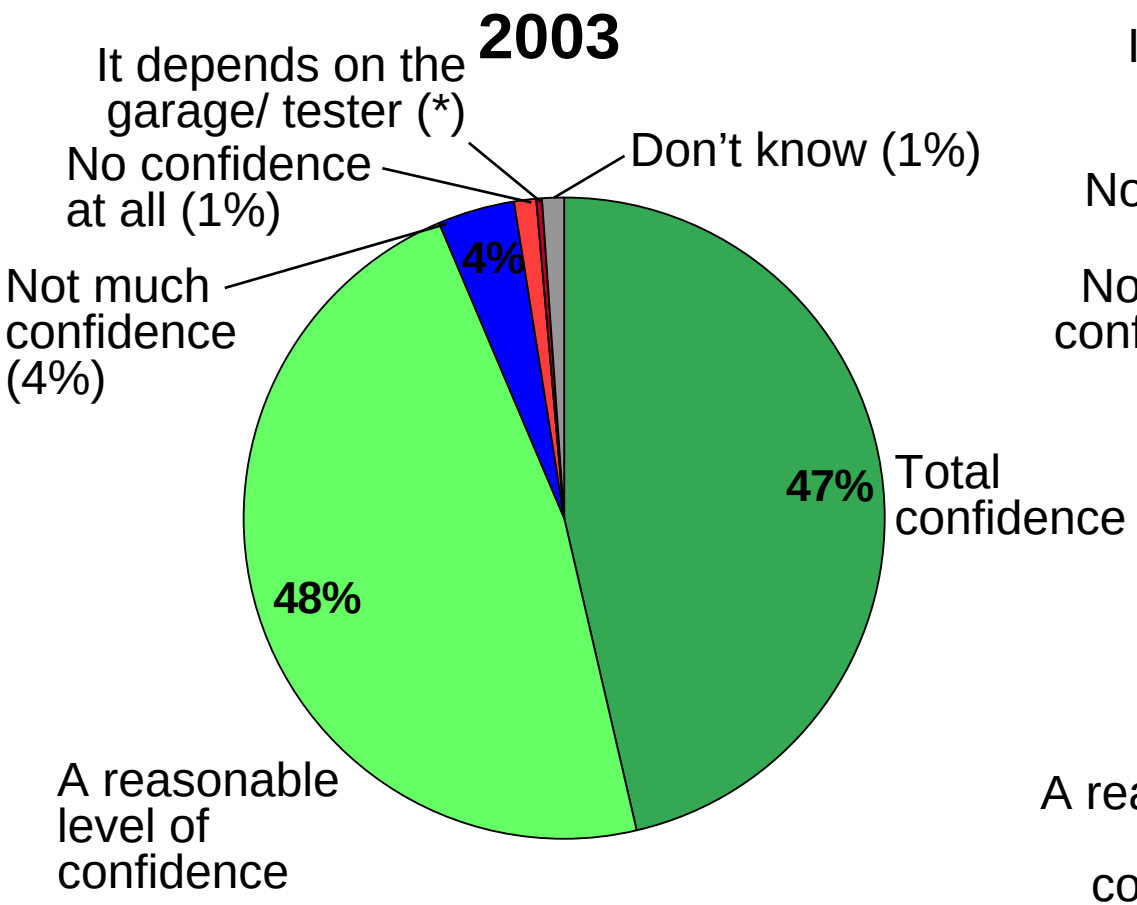


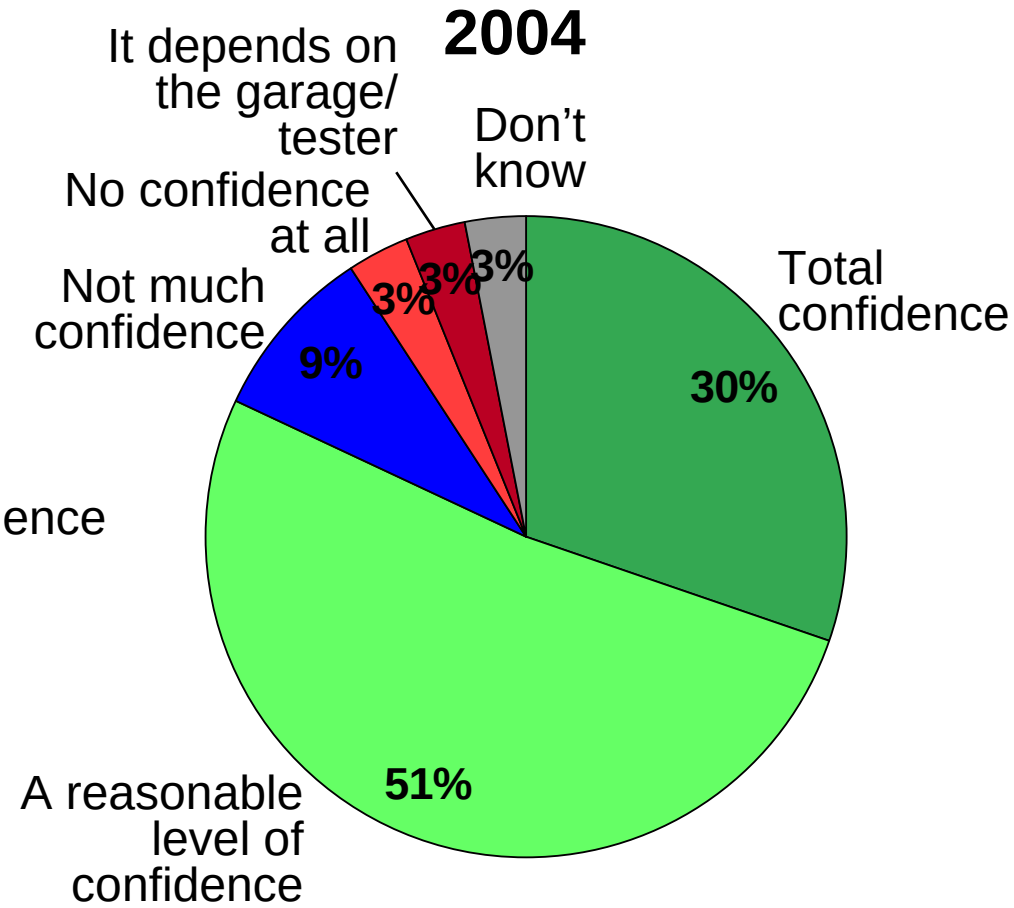


Base: All whose vehicle failed its most recent MOT Test (94), 2004; (221), 2003

Confidence in the MOT Test

QF4 How much confidence do you have if a vehicle passes the MOT that it is completely roadworthy?

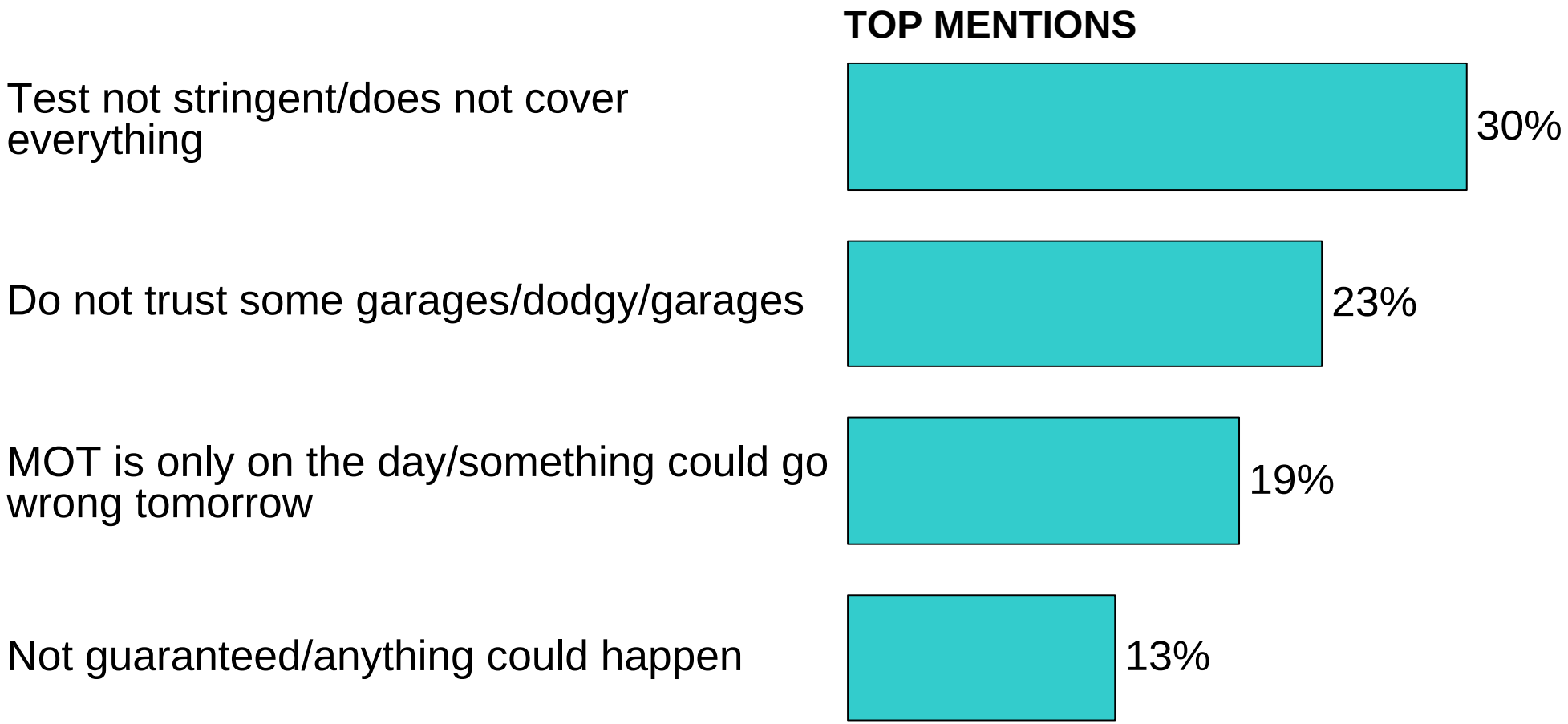




Base: All (1,044), 2004; All (1,012) MOT Survey, 2003

Reasons for Not Having Confidence in the MOT Test

QF5 Why do you say that you <u>don't have confidence</u> that a vehicle is completely roadworthy if its passes the MOT Test?

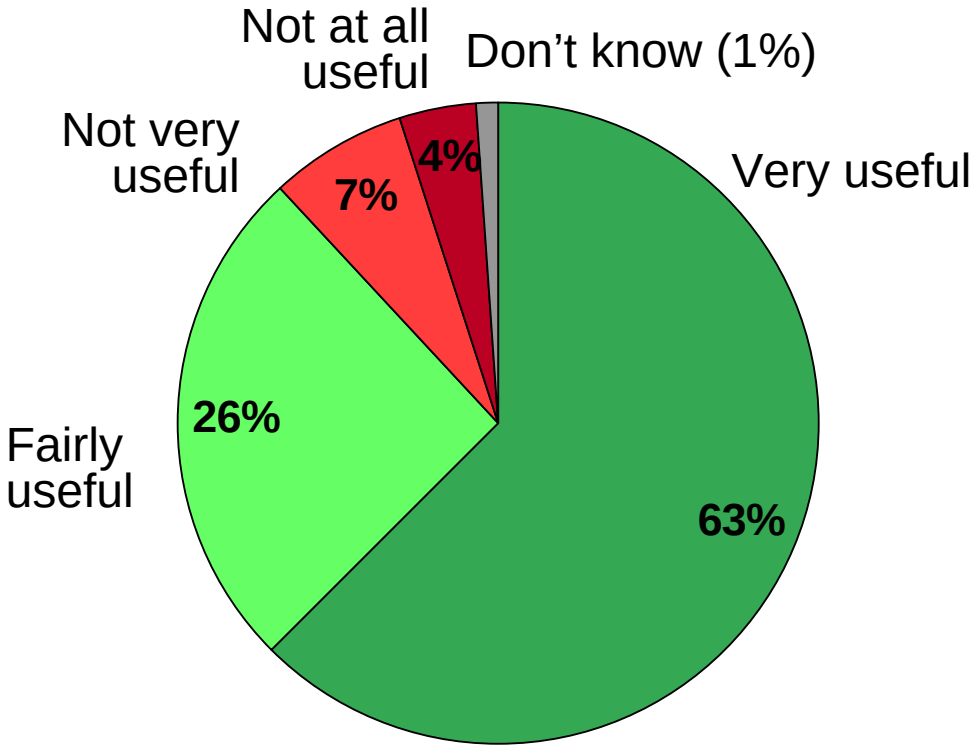


Base: All who are not confident that a vehicle is roadworthy if it passes its MOT Test (124)

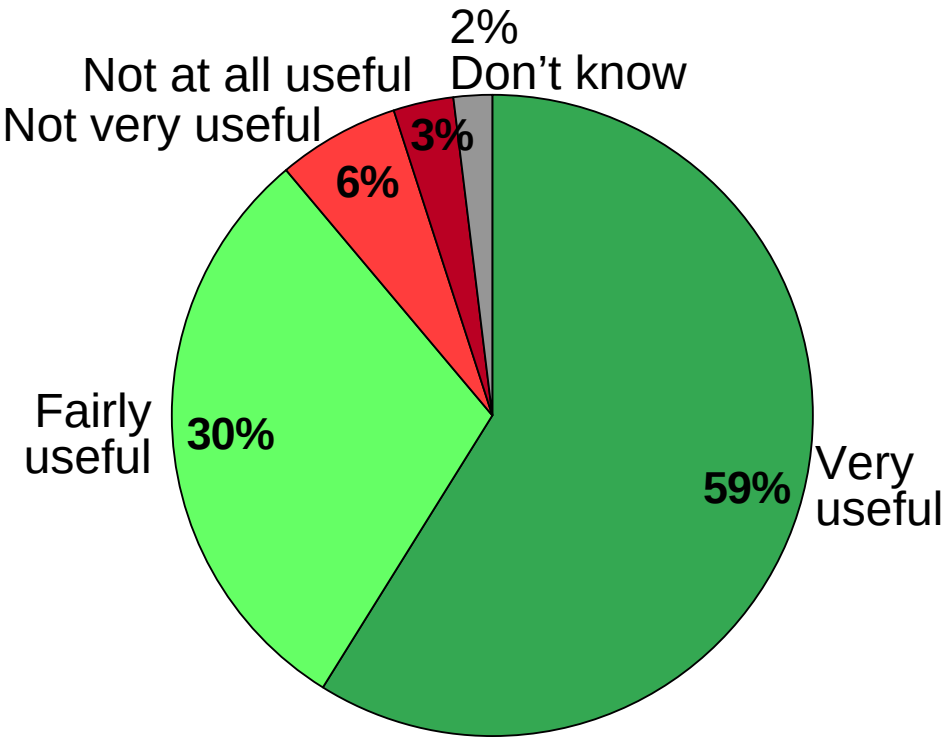
MOT Reminder

QF6 How useful, if at all, would you find having a reminder when your MOT Test is due?

2003



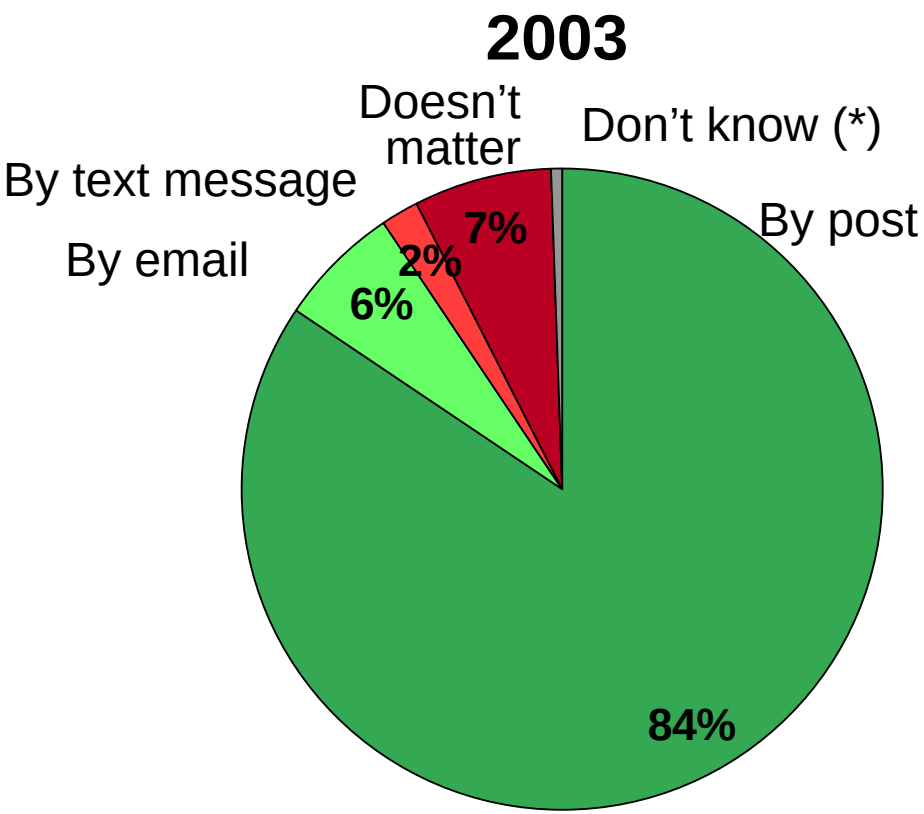
2004

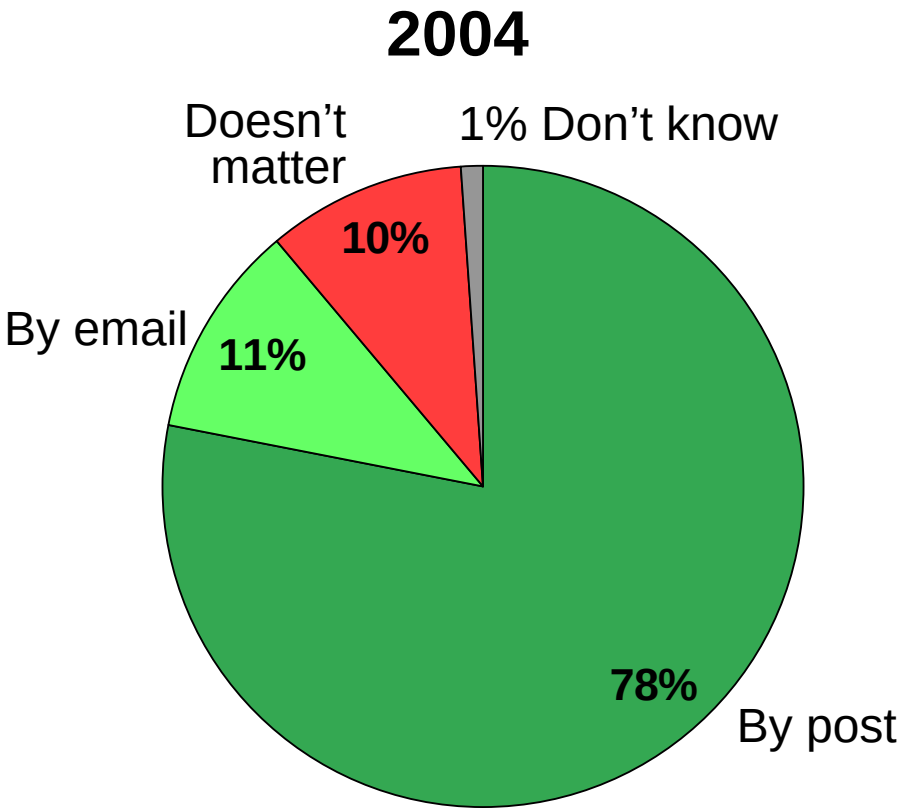


Base: All (1,044), 2004; All (1,012) MOT Survey, 2003

MOT Reminder – Post or Email

QF7 Would you prefer the reminder to be sent by post or email?

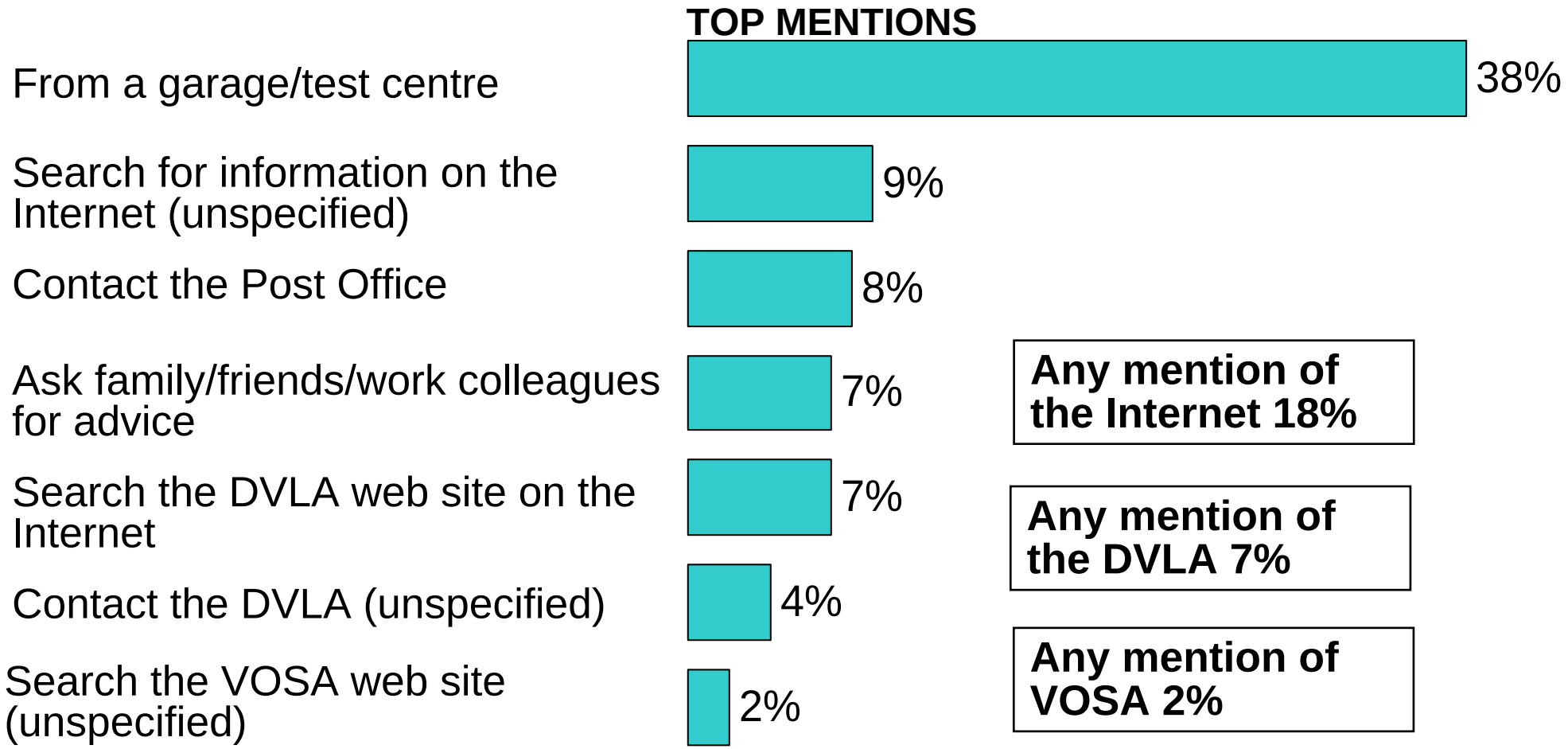




Base: All who say reminder is useful (924), 2004; All who say reminder is useful (896) MOT Survey, 2003

Information about the MOT Test

QF8 Where would you look for information about the MOT?



Base: All (1,044)

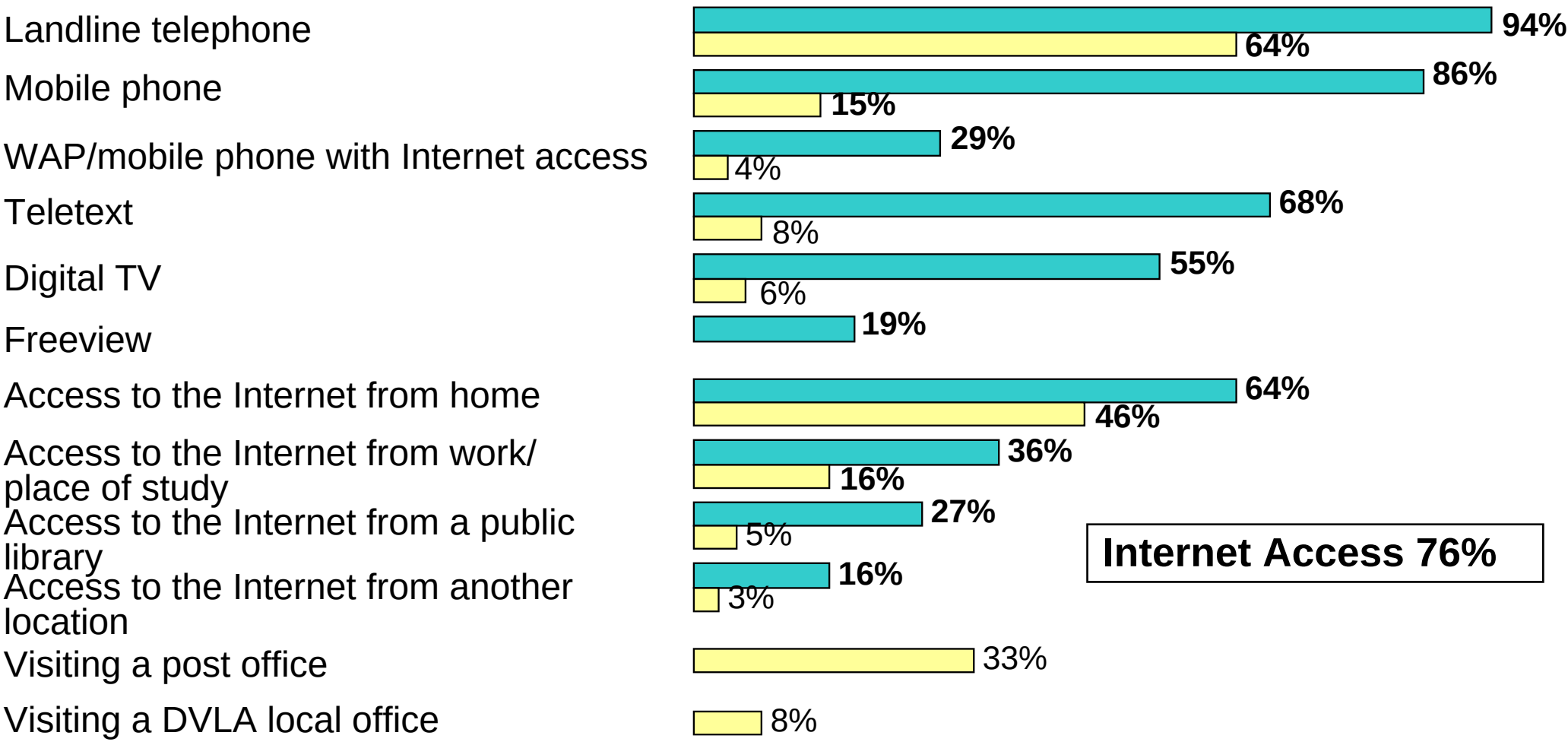
Online Motoring Services

Online Motoring Services - Summary

- Almost **two-thirds of all private motorists have access to the Internet at home** and more than a third have access at work/place of study
- With Internet use growing, **it may not be surprising that more than half of all private motorists would use some type of Internet service to access Government services.**
- There is a **high proportion of Internet users who say they are likely to apply online for a replacement driving licence** (72%), **apply for a replacement logbook** (67%) or **apply to renew road tax** (64%).
- Consistent with 2003, the **AA remains the most commonly used motoring website asked about**, followed by the **DVLA website**.
- The **majority of private motorists have not heard of the Government Gateway (76%) and of those that have, just 23% have gone on to register.**
- A similar trend is evident for **UK Online Centres**, with just **one-quarter of private motorists being aware of these**. Again, usage of these Centres is limited to a small minority of those who are aware of the service.

Government Communication Channels

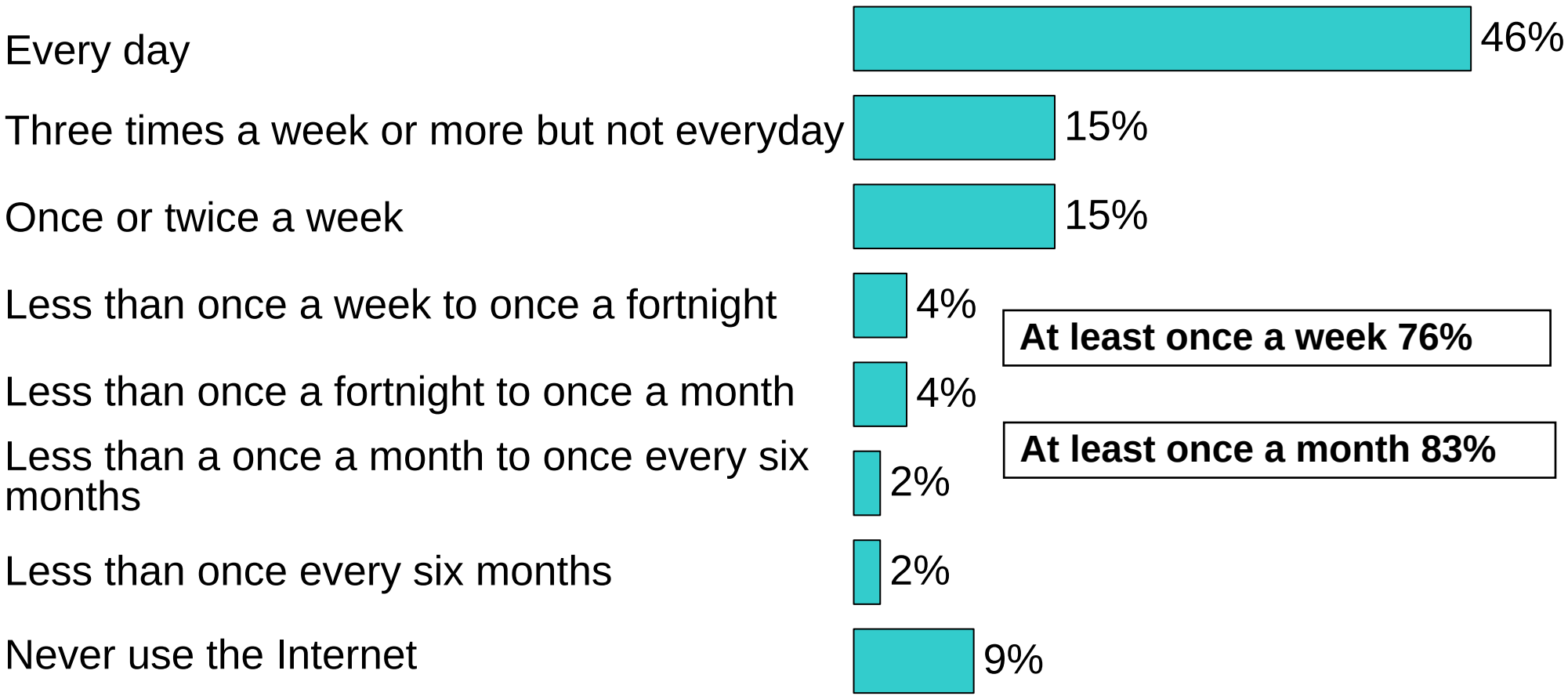
QH1a Which of these do you have or own?
QH1b Which of these are you likely to use to access Government services?



Base: All (1,044)

Frequency of Internet Use

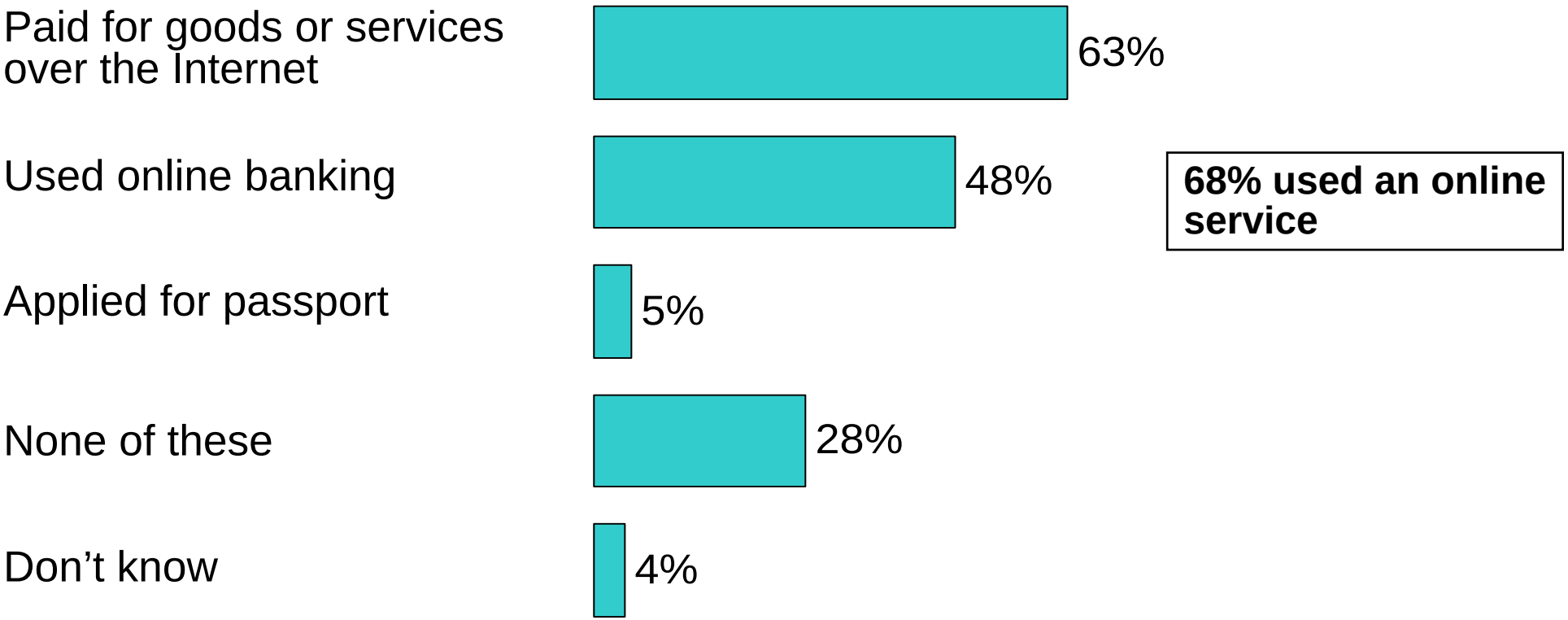
QH2 And how often would you say that you use the Internet?



Base: All who have access to the Internet (766), 2004

Online Service Usage

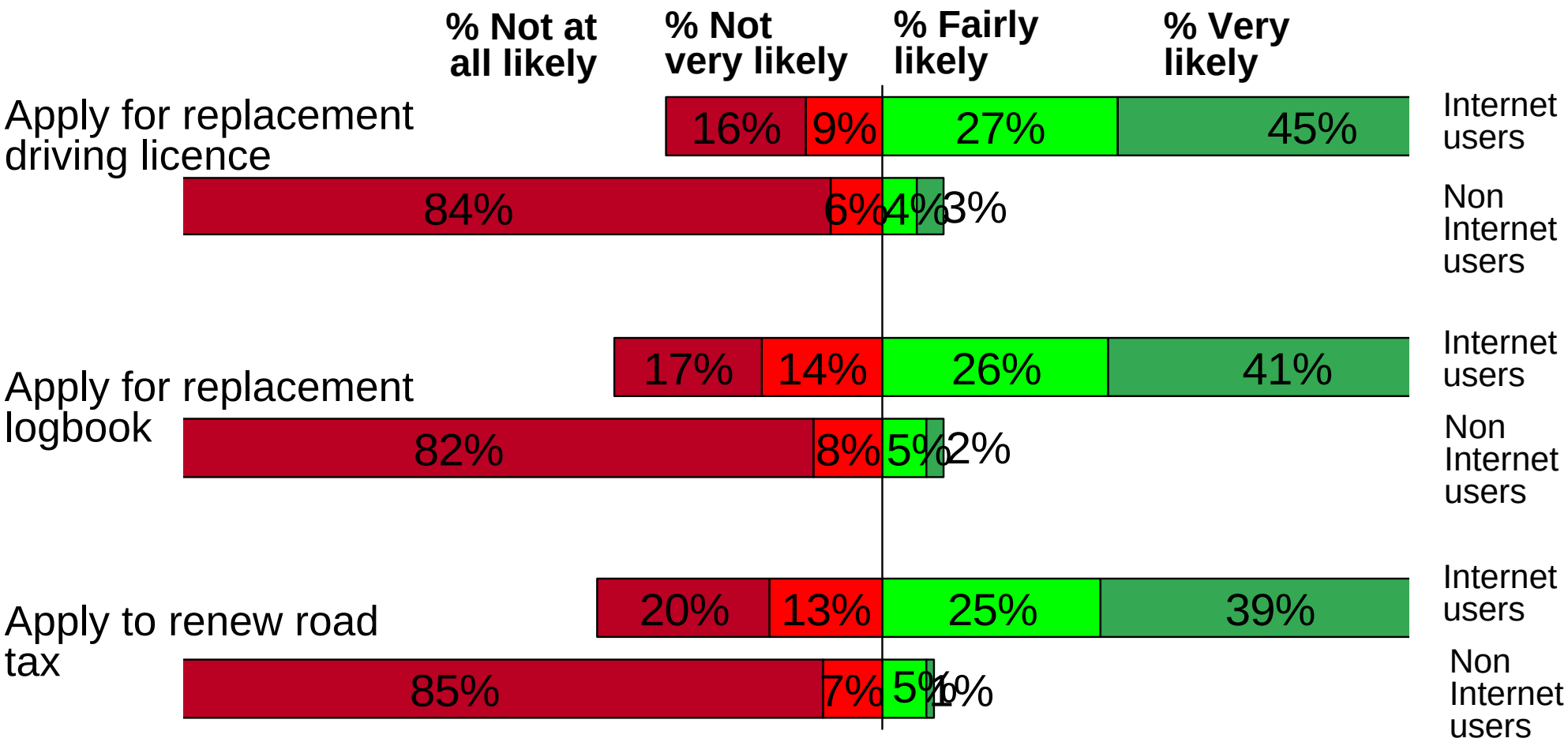
QH3 And which, if any, of the following have you done using the Internet?



Base: All who have access to the Internet (766)

Using Online Services - 1

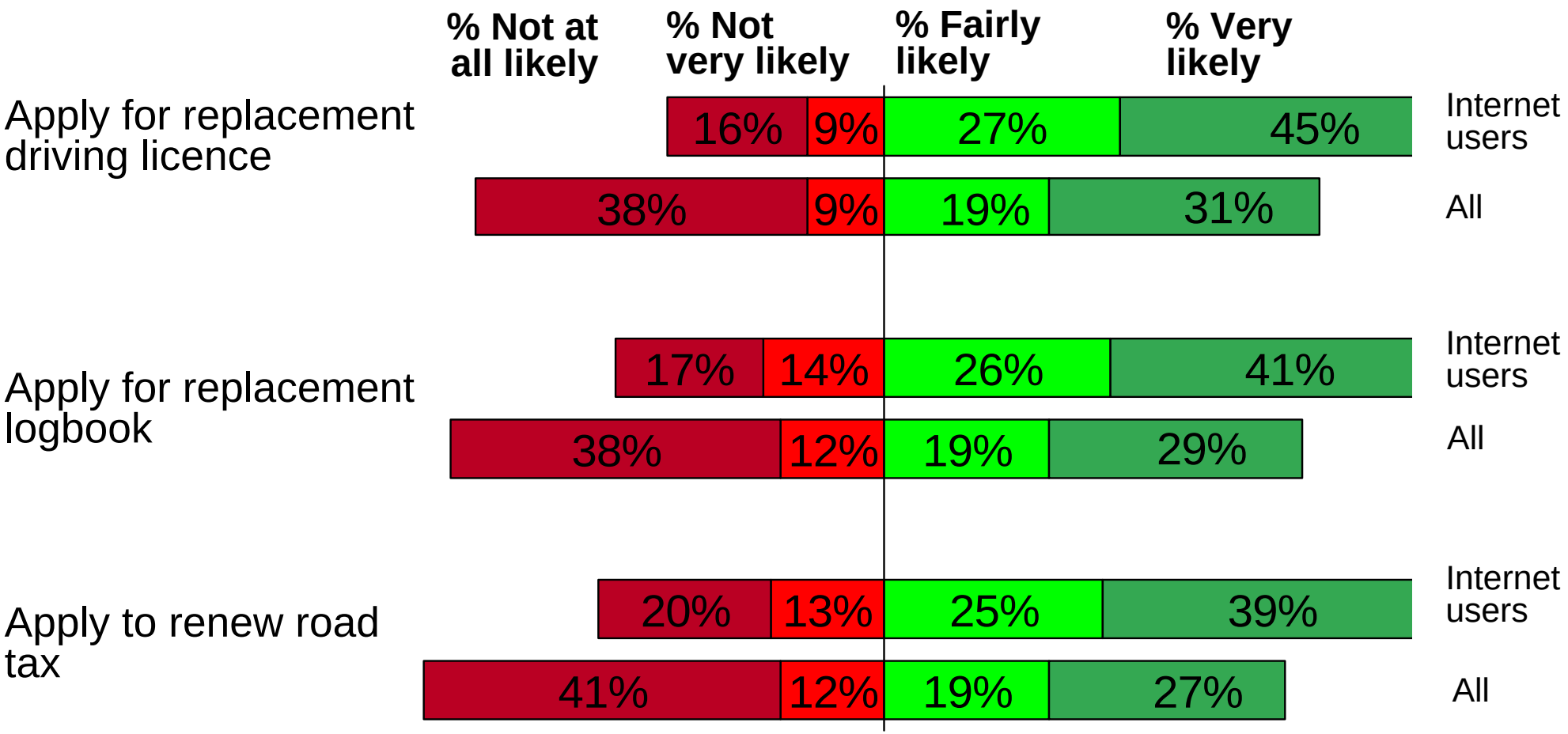
QC6, QD8, QE10 If you were to ….. how likely, if at all, would you be to do this online if the facility were available?



Base: All who use the Internet (661), All who do not use the Internet (278)

Using Online Services - 2

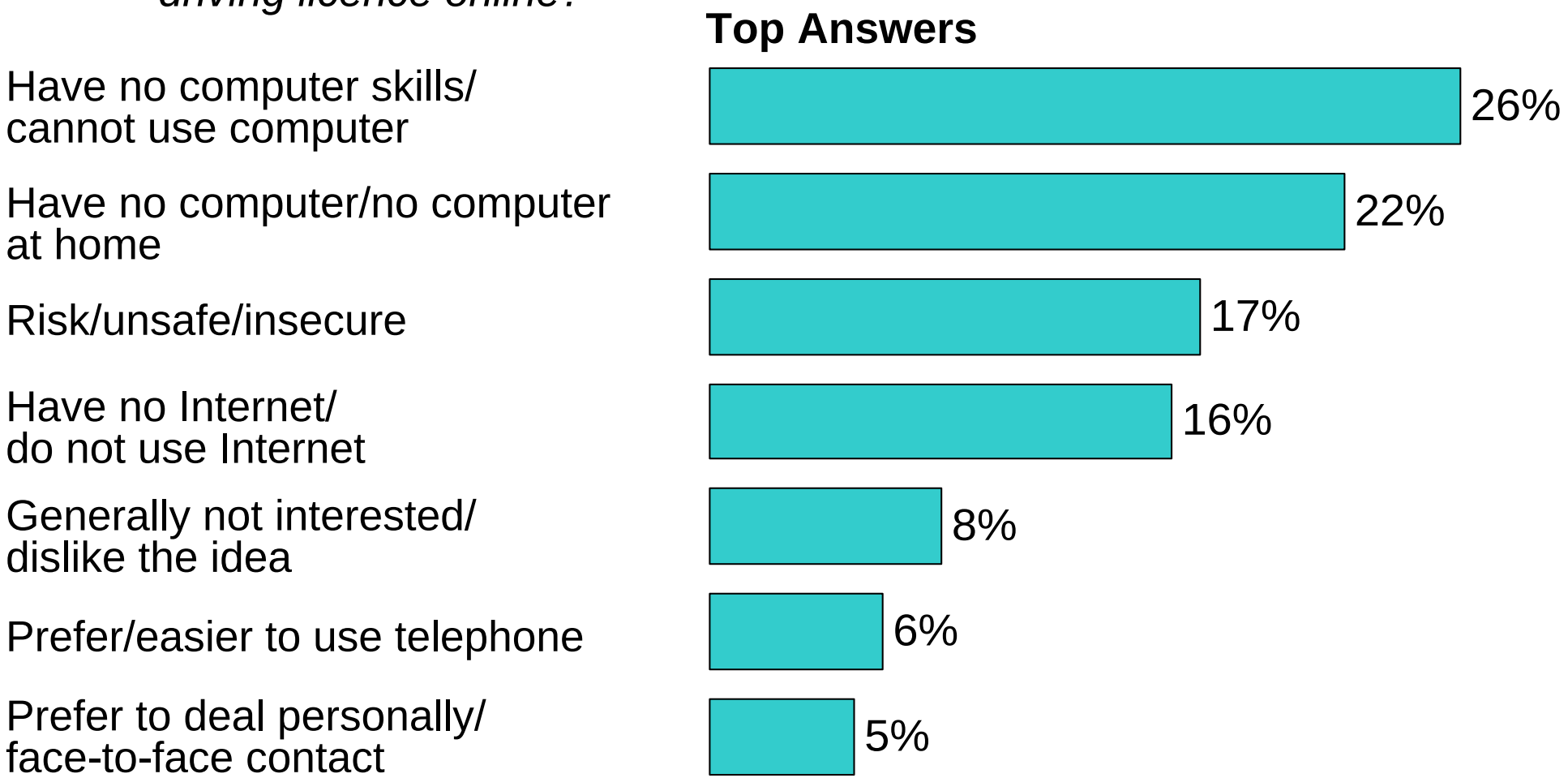
QC6, QD8, QE10 If you were to ….. how likely, if at all, would you be to do this online if the facility were available?



Base: All (1,044); All who use the Internet (661)

Reasons for Not Using Online Facility

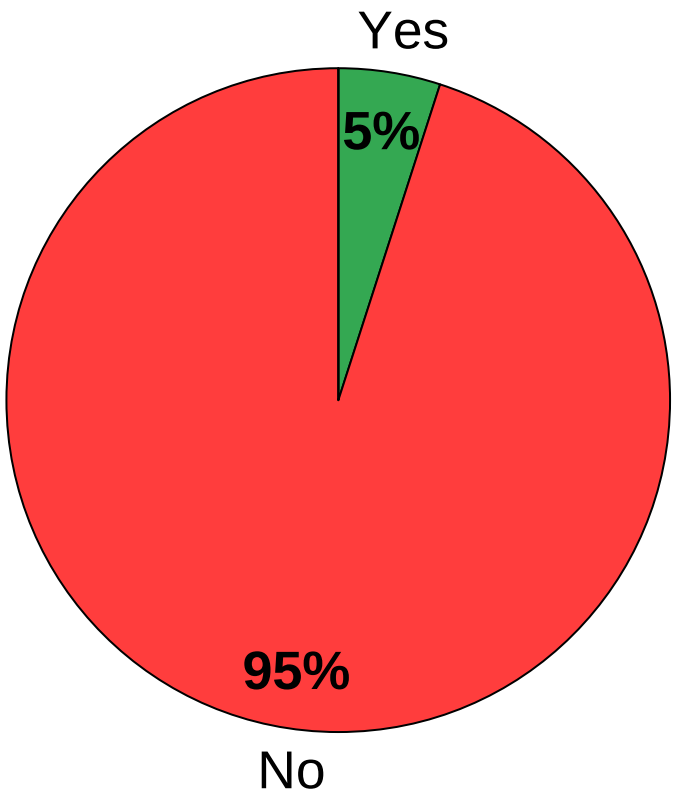
QE11 Why do you say that you are very/fairly unlikely to apply for a replacement driving licence online?



Base: All unlikely to apply for a driving licence online (526)

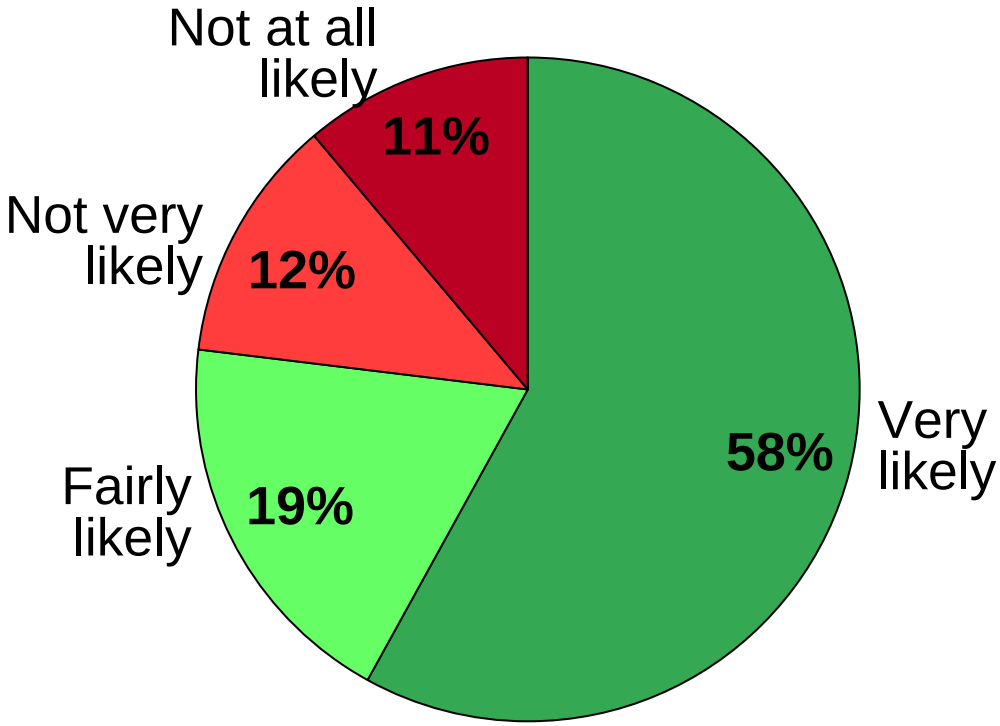
Personalised Number Plates

QH14 Do you have a personalised number plate?



Base: All (1,044)

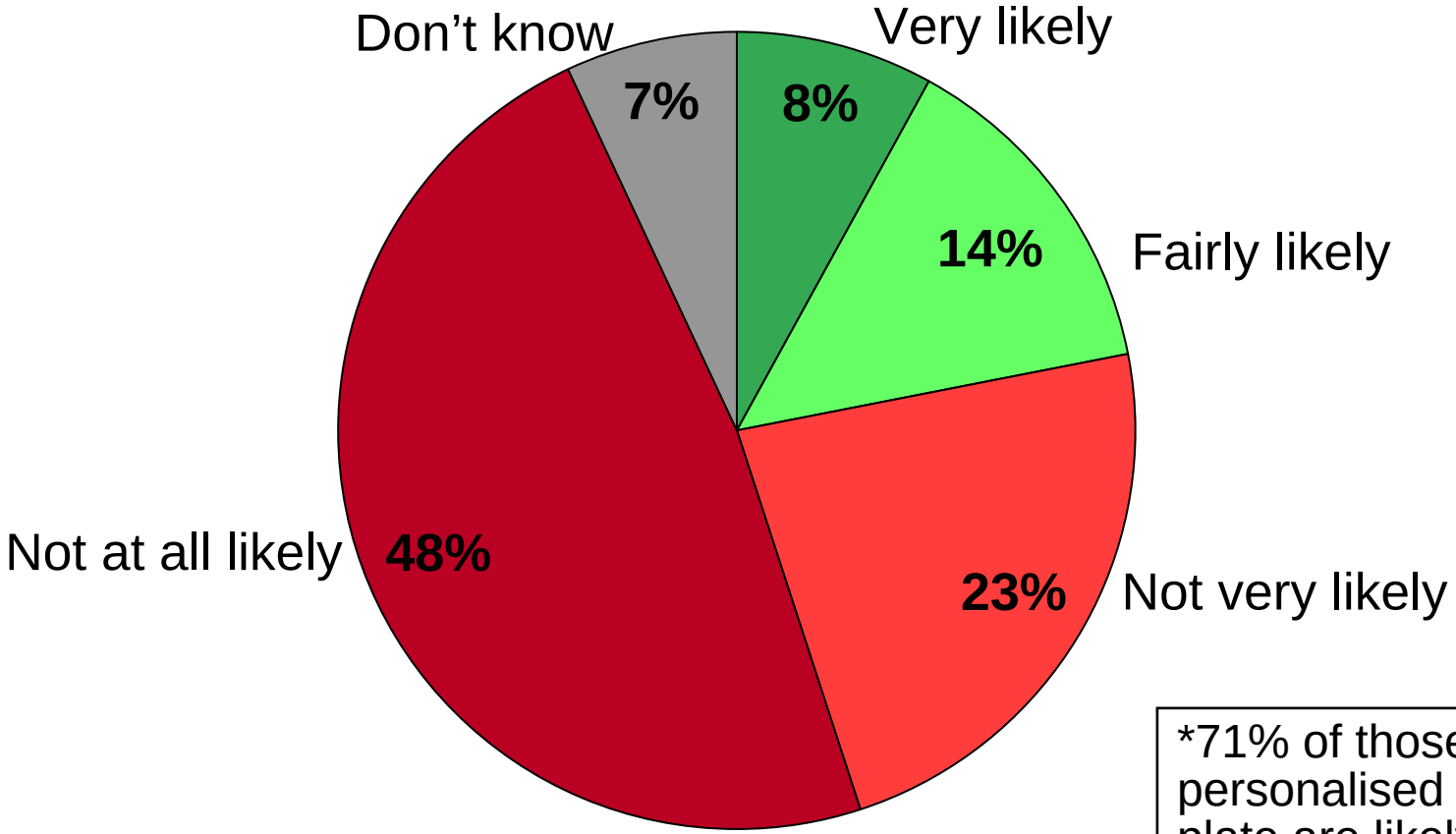
QH15 If you wanted to transfer a personalised number plate between vehicles, how likely, if at all, would you be to do this online if the facility were available?



Base: All who have a personalised number plate (53)

Transferring Personalised Number Plates at Motor Dealerships

QH16 If you could transfer or buy a personalised number plate at a motor dealer when you were buying a new or second-hand vehicle, how likely would you be to do this?

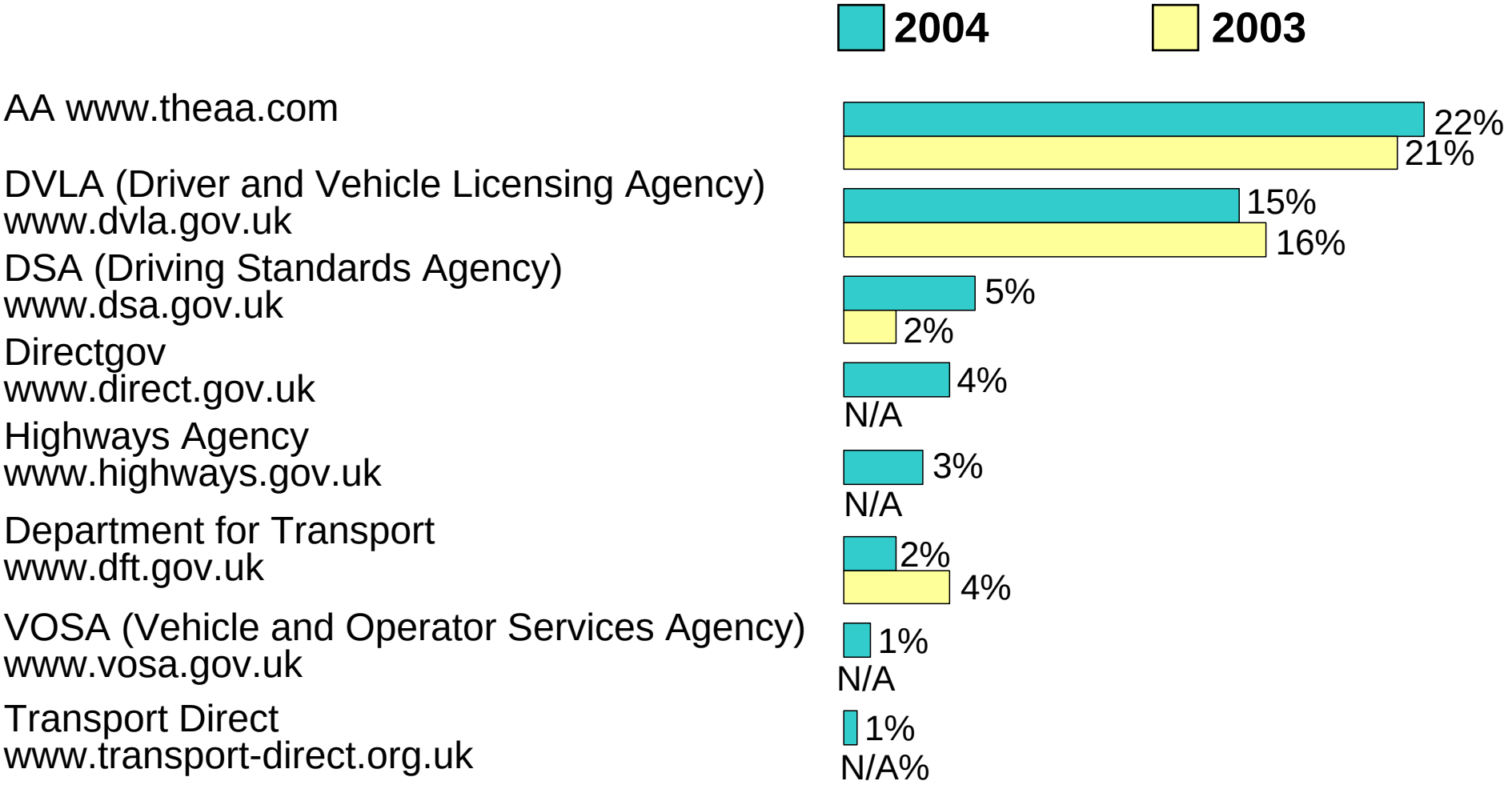


*71% of those with a personalised number plate are likely to do this

Base: All (1.044); *All who have a personalised number plate (53)

Websites for Motorists

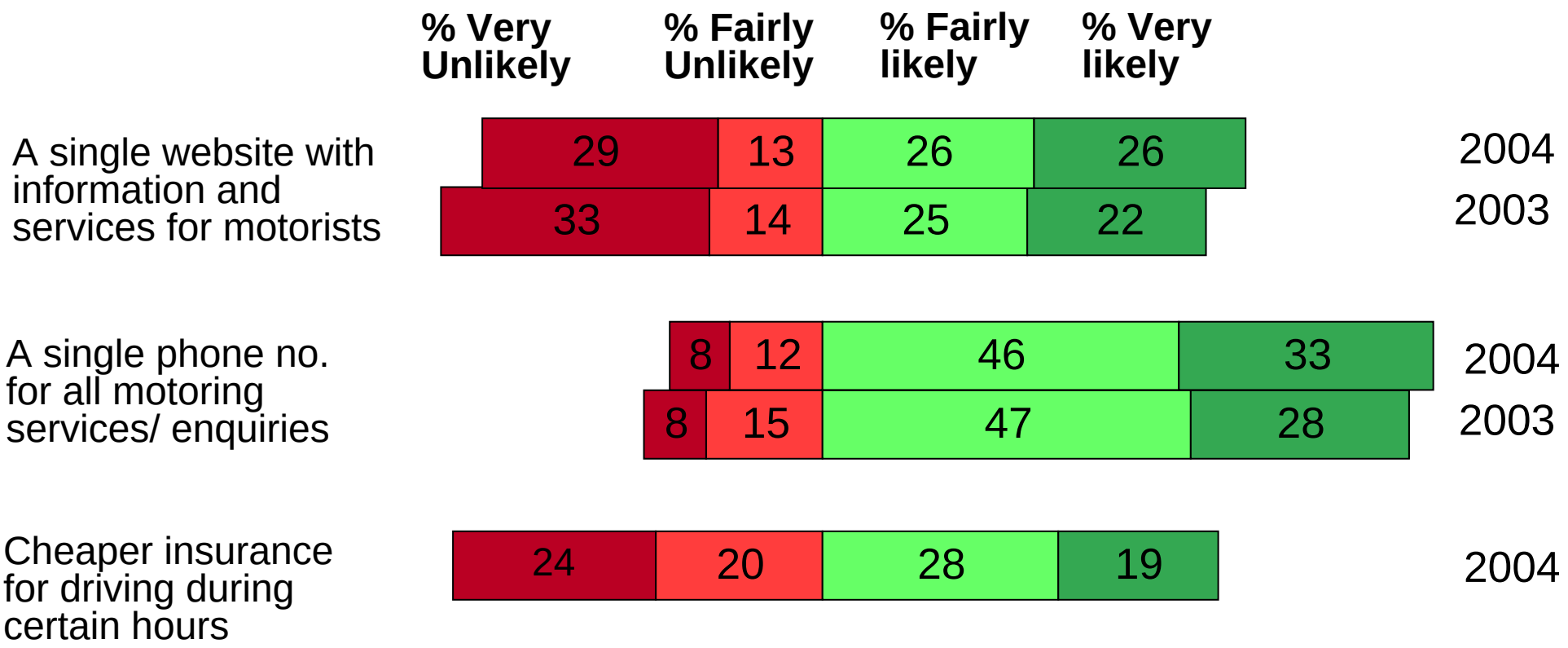
QH4 Have you used any of these websites for motorists in the last 12 months?



Base: All who have access to the Internet (766), 2004; All who have access to the Internet (504),2003

New Service Developments

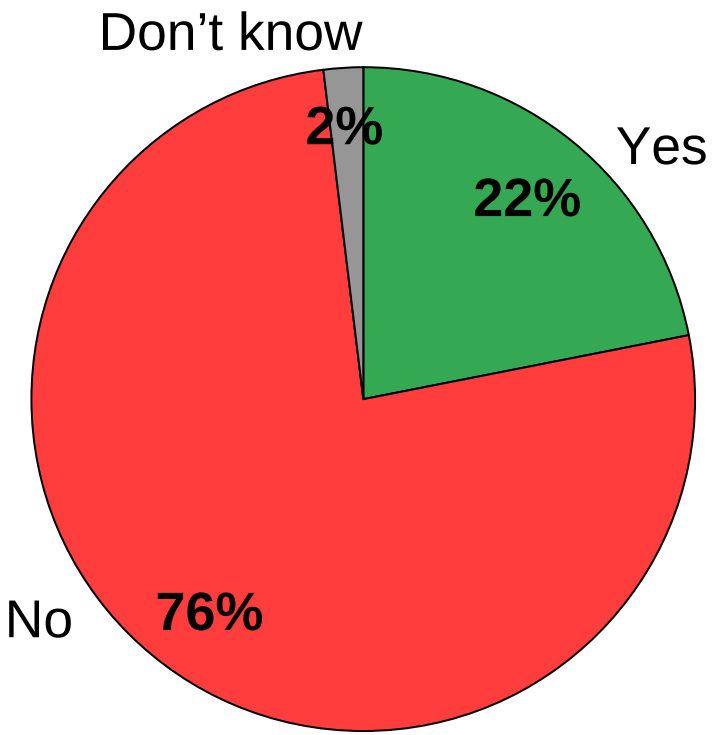
QH13 How likely would you be to use the following?



Base: All (1,044), 2004
Base: All drivers (816), 2003

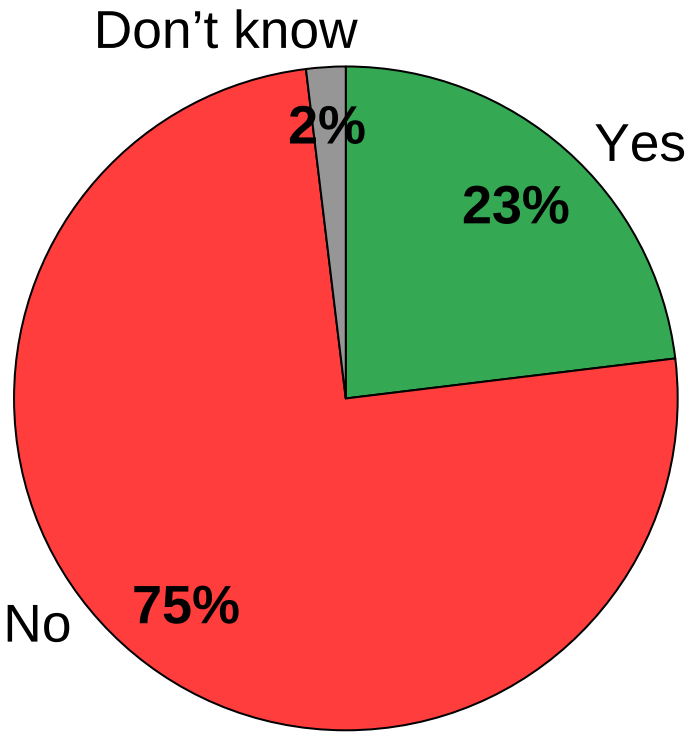
Government Gateway

QH7 *Are you aware or not of the Government Gateway?*



Base: All (1,044)

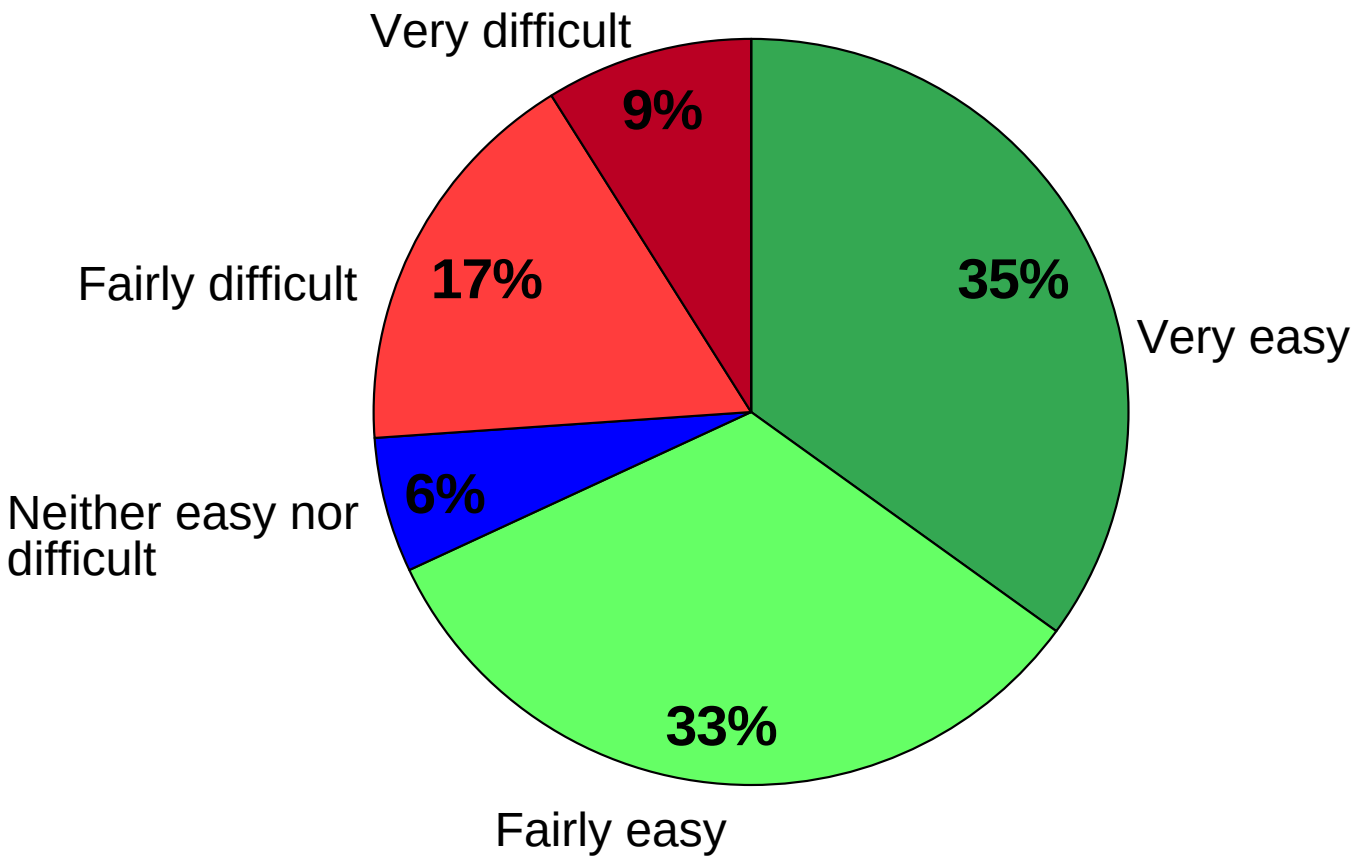
QH8 *Have you registered on the Government Gateway?*



Base: All aware of the Government Gateway (223)

Government Gateway

QH9 And, how easy or difficult did you find registering on the Government Gateway?



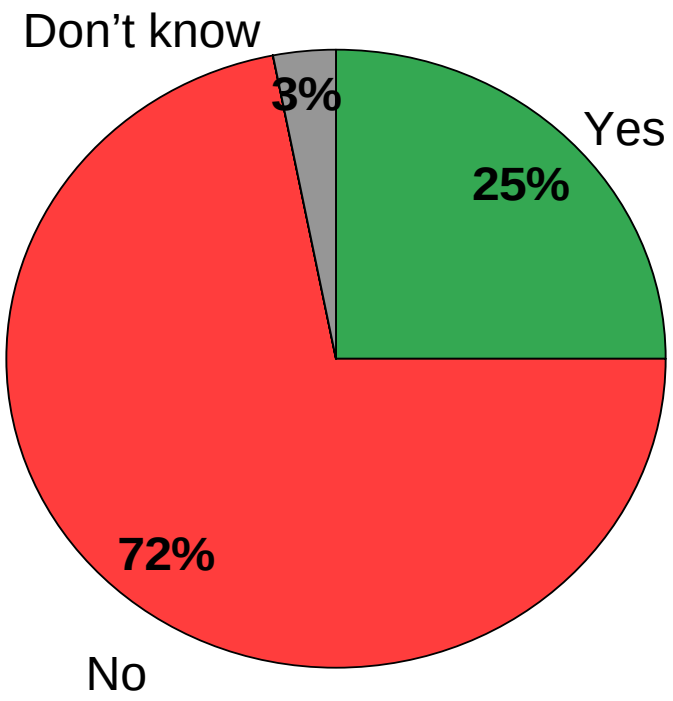
Base: All who have registered on the Government Gateway (49), 2004

UK Online Centres

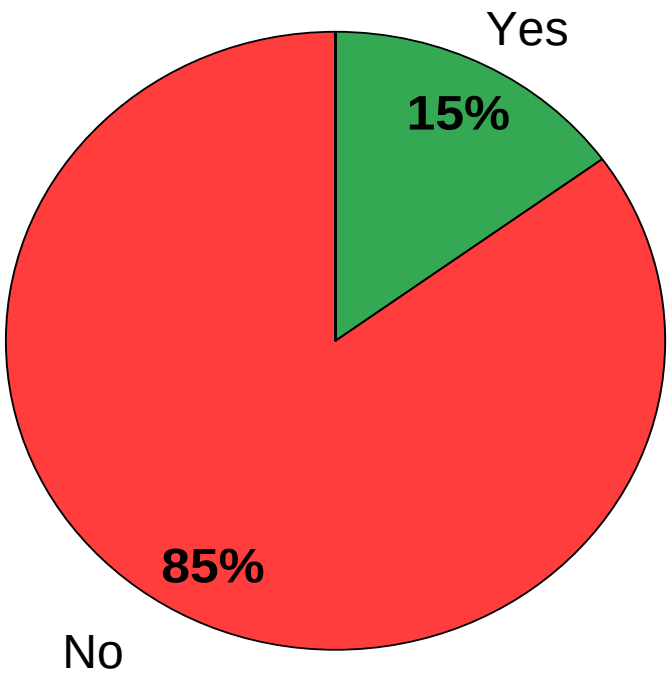
QH5 Are you aware or not of UK online centres which provide access to computers, as well as help on using them?

QH6 Have you ever used a UK online centre?

H5



H6



Base: H5: All (1,044), 2004; H6: All aware of UK online centres (264), 2004

Current and Future Initiatives and Service Propositions

Current and Future Service Propositions - Summary

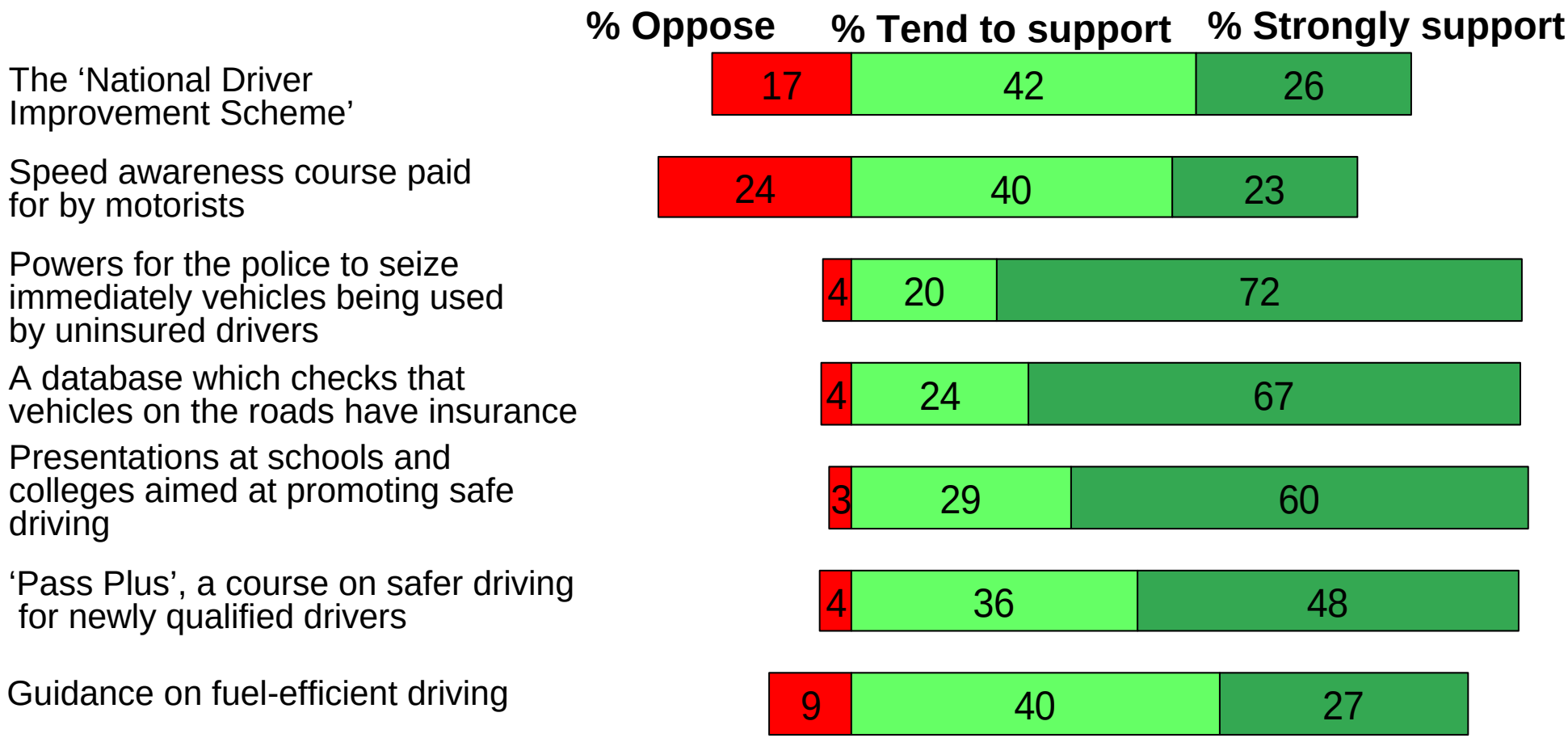
- **Private motorists welcome the Government devoting more resources to a range of motoring-related initiatives** asked about. Support is particularly high for more radical measures, such as powers to the police to seize vehicles used by uninsured drivers and a database that checks vehicles on the road have insurance. This relates to the earlier findings that motorists perceive motoring-related crime is increasing and the relatively high proportion who are dissatisfied with Government efforts in this area.

- Consistent with the 2003 findings, around **one in five private motorists have personally taught someone to drive or accompanied a learner driver in the last five years**. However, a greater proportion in 2004 expect to do either of these in the future (30% compared with 23% in 2003). This may be related to the younger age profile of the 2004 survey.

- The **majority of private motorists have received no formal driver training since passing their practical driving test** (81%).

Support for Motoring-Related Initiatives

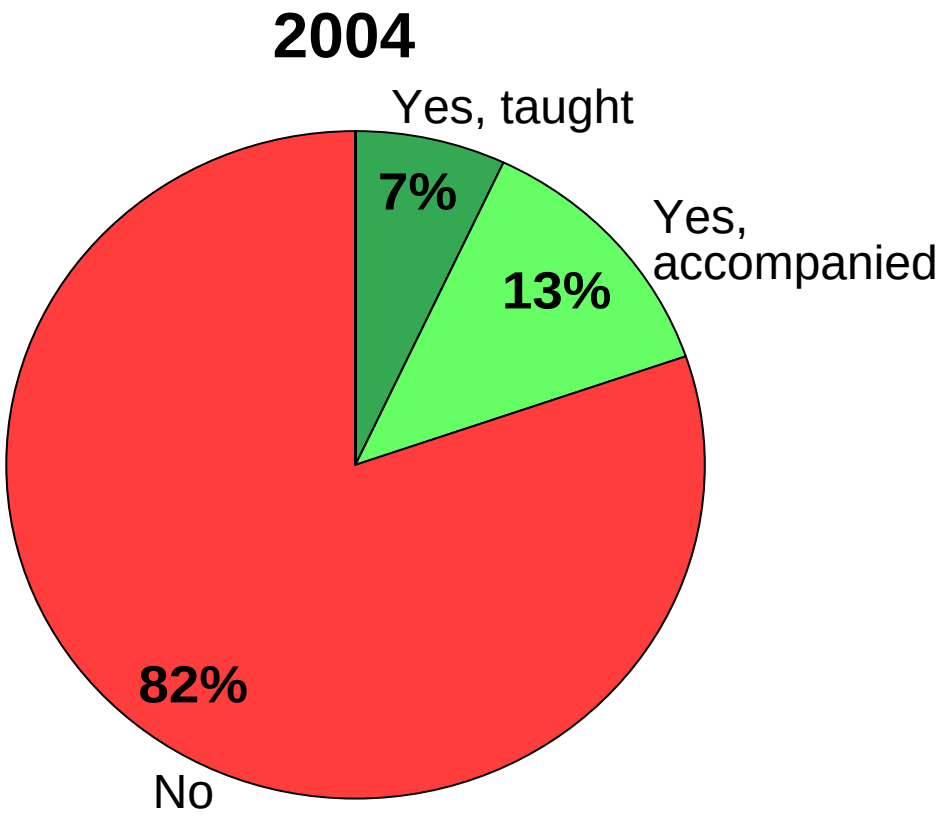
QG4 How strongly would you support or oppose the following initiatives?

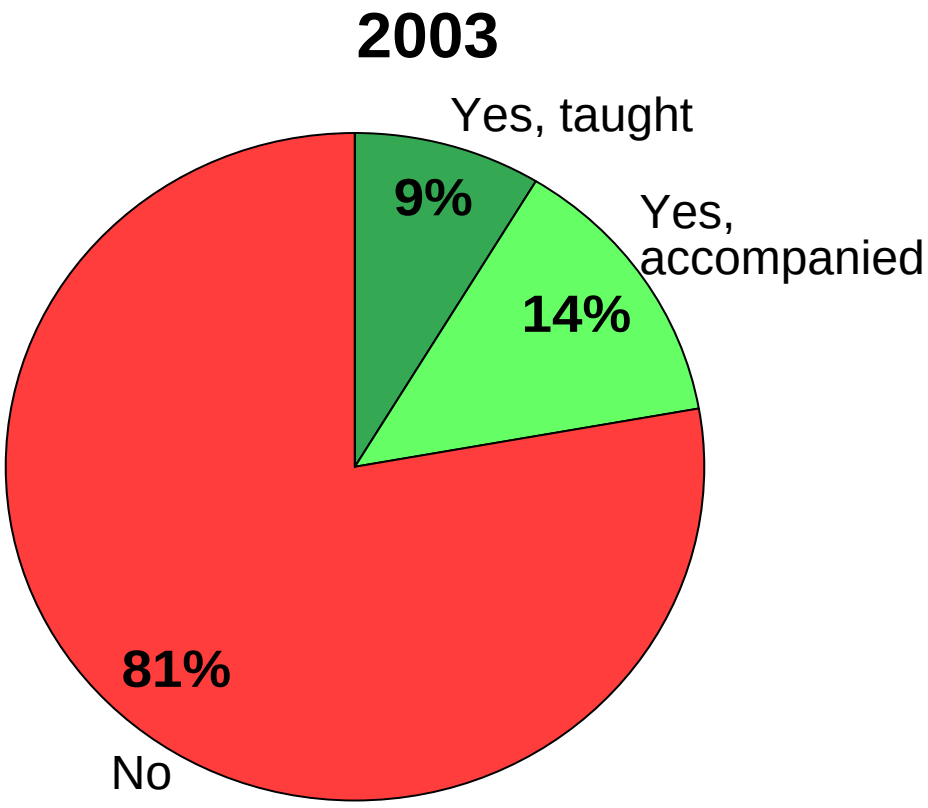


Base: All (1,044)

Teaching Someone to Drive - 1

QG1 Have you personally either taught someone to drive or accompanied a learner driver while they practised driving, within the last five years?



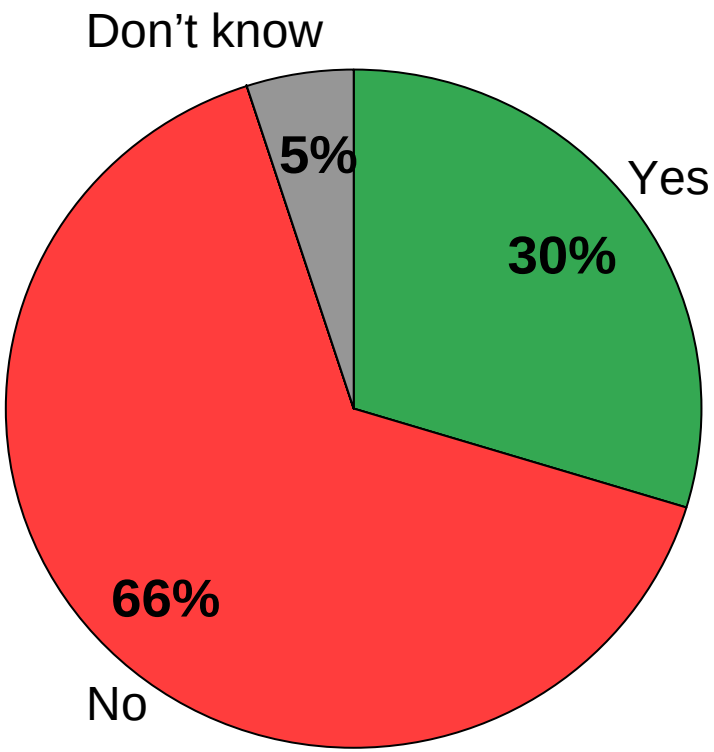


Base: All (1,044), 2004; All drivers (816), 2003

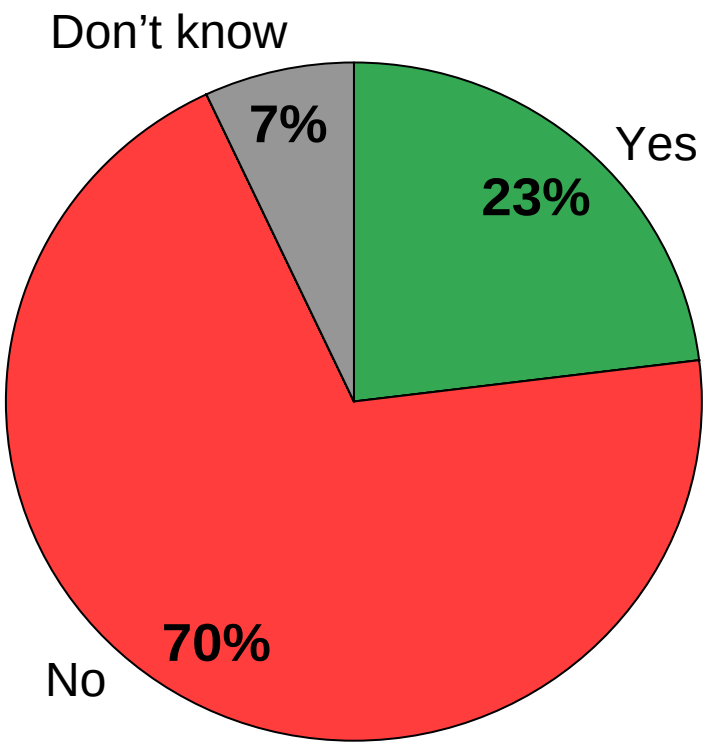
Teaching Someone to Drive - 2

QG2 Do you expect to do either of these at some time in the future?

2004



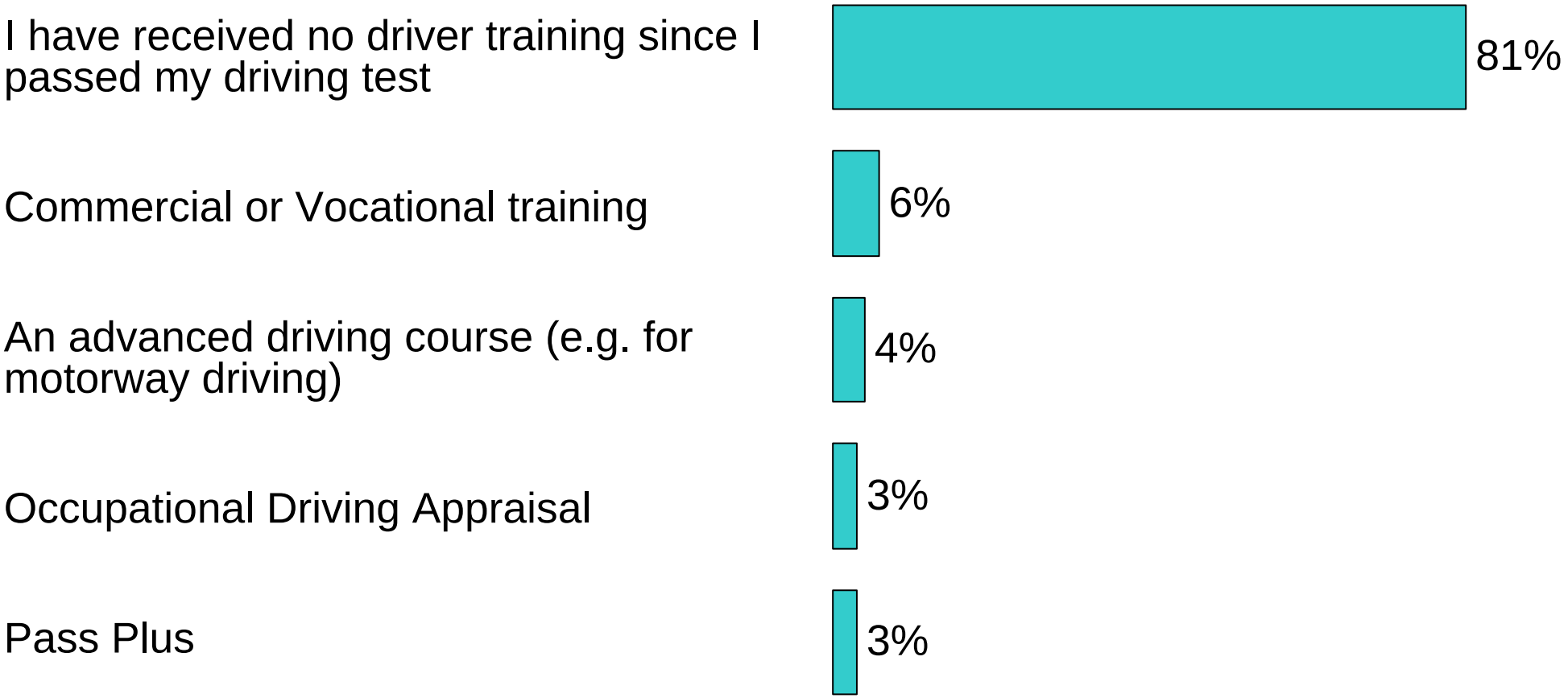
2003



Base: All (1,044), 2004; All drivers (816), 2003

Formal Driver Training

QG5 What formal driver training, if any, have you received since you passed your driving test?



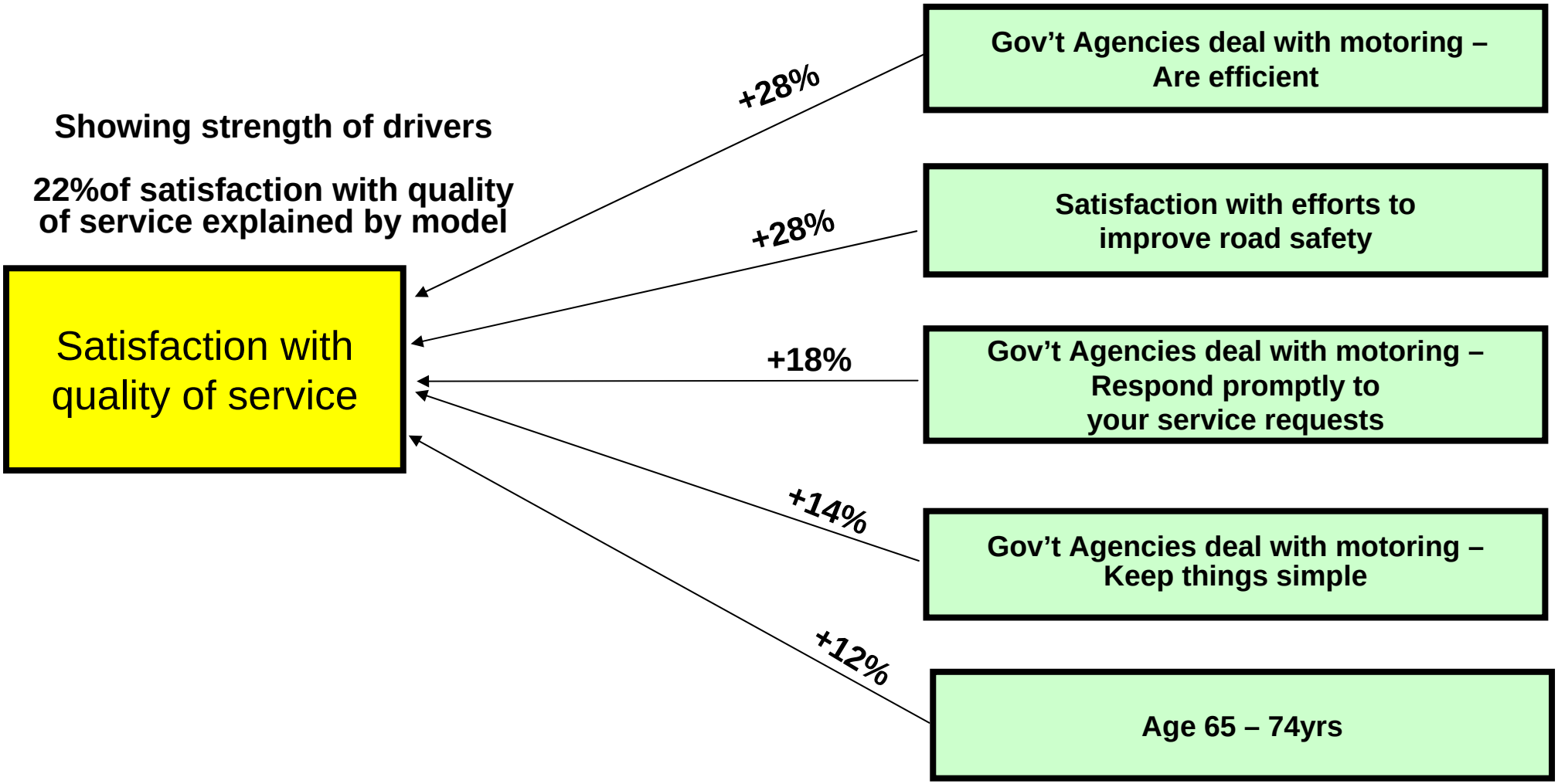
Base: All (1,044)

Key Driver Analysis

Key Driver Analysis – Satisfaction with quality of service from Government Agencies which deal with motoring

Showing strength of drivers

22%of satisfaction with quality of service explained by model

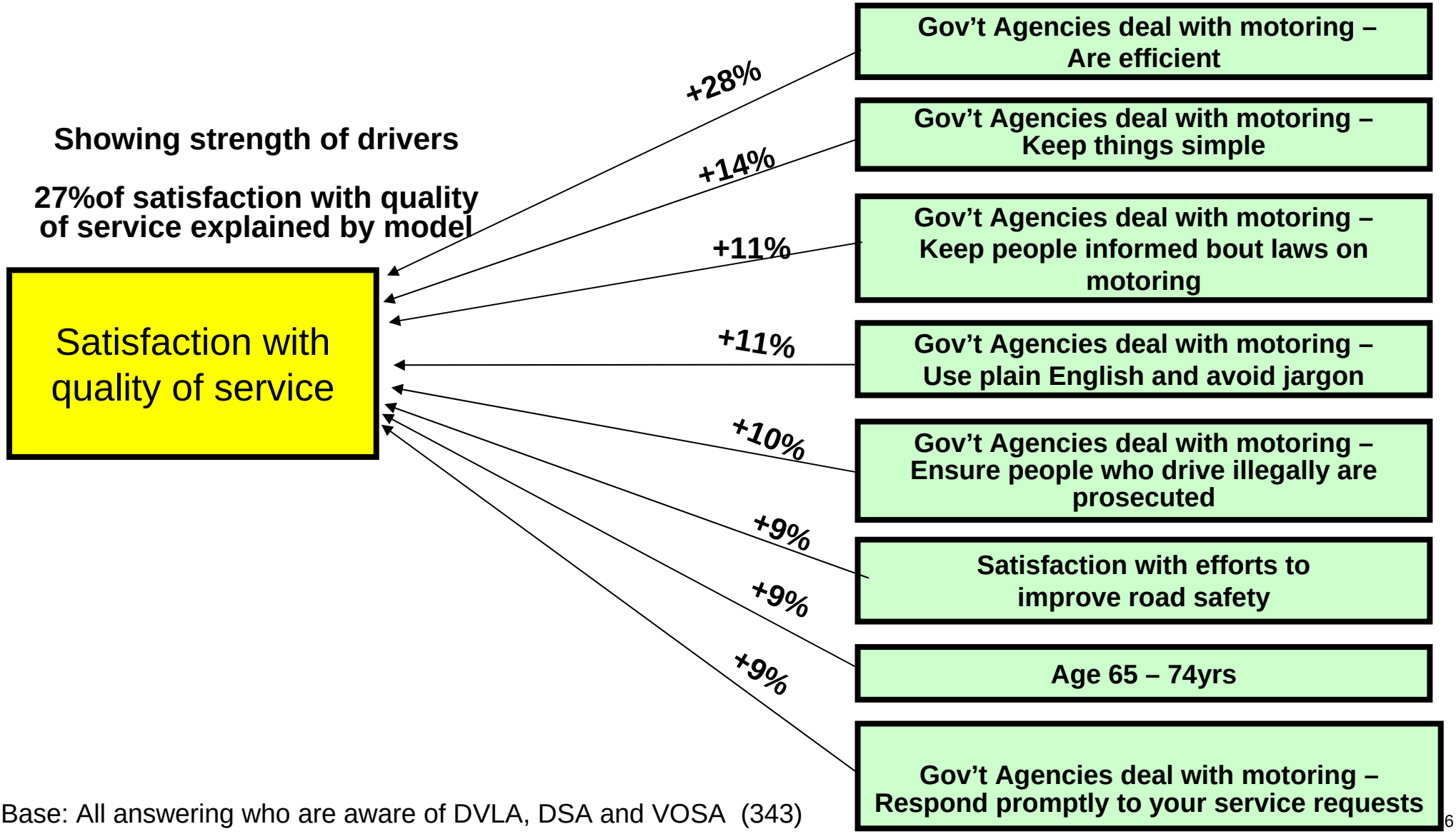


Base: All respondents answering (1,010)

Key Driver Analysis – Satisfaction with quality of service from Government Agencies which deal with motoring

Showing strength of drivers

27%of satisfaction with quality of service explained by model



Base: All answering who are aware of DVLA, DSA and VOSA (343)

Key Driver Analysis – Value for money from Government Agencies which deal with motoring

Showing strength of drivers

32%of good value for money explained by model

Good value for money

- 24% — **Gov't Agencies deal with motoring – Are efficient**
- 17% — **Satisfaction with efforts to improve road safety**
- 16% — **Gov't Agencies deal with motoring – Keep things simple**
- 12% — **Social Class AB**
- 12% — **Gov't Agencies deal with motoring – Ensure people who drive illegally are prosecuted**
- 10% — **Gov't Agencies deal with motoring – Are easy to contact**
- 9% — **Gov't Agencies deal with motoring – Respond promptly to your service requests**

Base: All answering who are aware of DVLA, DSA and VOSA (348)

Appendices

Sampling - 1

- Sampling for the 2004 Private Motorist Survey was based on rigorous quotas within OAs (Output Areas) as geographical sampling units.

- A sample of 175 and 80 reserve Census Output Areas (OAs) from across Great Britain provided eligible lists of addresses which interviewers could use to secure interviews. A total of six interviews were conducted per OA.

- Quota sampling is based on defining the distribution of characteristics required in the sample (in this case private motorists by gender, age and working status), and selecting respondents until a 'quota' has been filled. For example, if the survey requires a sample of six men and six women in a particular OA, a quota sample will 'tick off' respondents until the right number of each type has been surveyed. This process in the survey was extended to cover several characteristics (e.g. 'male motorists under thirty-five years of age who are working').

Sampling - 2

- Overall quotas were set on the following, based on available data from the DfT and DVLA:

  Gender: Male = 55%, Female = 45%

  Age: 17-34 = 22.3%, 35-54 = 42.4%, 55+ = 35.3%

  Working status: Work full time = 44%, Not working full time = 56%

- For the purposes of the study, 'private motorists' were defined as:
  - Adults who hold a full licence, covering those eligible to ride motorcycles and/or drive cars and light vehicles with up to nine seats and weighing up to three-and-a-half tons <u>and</u> have driven/ridden in the last three months
  - Drivers of light goods vehicles, but not taxi drivers, HGV drivers, PSV drivers and/or approved driving instructors

- Interviewing was conducted during the day, and across evenings and weekends to capture those who are more economically active and mobile.

- The sampling procedure ensures that the sample is fully representative, both in terms of the known demographic profile of Great Britain and sub-areas.

Sampling - 3

- Response rate information was not collected in the 2004 Private Motorist Survey. However, feedback from interviewers indicates that the response rate varied between OAs. For example, some interviewers were given an OA with 200+ addresses, and were able to achieve their six interviews in the OA by approaching only half of their addresses. Other interviewers were unable to achieve their required number of interviews and exhausted all addresses in their OA, so were given reserve points in adjoining OAs.

- All sampling was carried out by MORI's in-house Sampling Unit. This was set up in 1994 to improve the quality of data available to us from external agencies, as well as to provide greater control, flexibility and quality of sampling procedures.

Statistical Reliability - 1

- The private motorists who participated in the survey are only a sample of the total ‘population’ of this group. We cannot therefore be certain that the figures obtained are *exactly* those we would have if all private motorists had been interviewed (the ‘true’ values). However, we can predict the variation between the sample results and the ‘true’ values from knowledge of the size of the samples on which the results are based, and the number of times that a particular answer is given.

- The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the ‘true’ value will fall within a specified range. The tables overleaf illustrate these ranges for different sample sizes and percentage results at the ‘95% confidence interval’, based on a random sample.

Statistical Reliability - 2

- Size of sample on which survey result is based. Approximate sampling tolerances applicable to percentages at or near these levels:

	10% or 90%	30% or 70%	50%
	±	±	±
1,044 interviews	**2**	**3**	**3**

- Thus, the confidence interval (or margin of error) is by how much the survey result could increase or decrease and still be considered to reflect the ‘true’ result that would have been recorded if everyone in the population had been surveyed.

- For example, if 30% of the full (1,044) sample have answered in a certain way, the chances are 95 in 100 that the ‘true’ result is within ±3 percentage points of that (ie between 27% and 33%).

Statistical Reliability - 3

Comparing Two Groups:

- We can also apply similar statistical formulae to the comparison of different sub-groups within the same survey, or different surveys over time.

- Differences required for significance at or near these percentage levels:

	10% or 90%	30% or 70%	50%
	±	±	±
1,044 and 816 (motorists 2004 vs. drivers 2003)	**3**	**4**	**5**
576 vs. 468 (men vs. women 2004)	**4**	**6**	**6**
262 vs. 220 (social class AB vs. DE 2004)	**5**	**8**	**9**
967 vs. 35 (car drivers vs. motorcyclists)	**10**	**16**	**17**

- Again, the degree of accuracy depends on the size of the sample/s and – to a lesser degree – on the actual result being considered. For example, if men and women record results of 10% and 20%, the difference *is* statistically significant (being beyond the ±4 point differences required in this case).

Definitions of Social Grades

- The list below contains the social class definitions as used by the Institute of Practitioners in Advertising. These groups are standard on all surveys carried out by MORI.

Social Class	Occupation of Chief Income Earner
A	Higher managerial, administrative or professional
B	Intermediate managerial, administrative or professional
C1	Supervisor or clerical and junior managerial, administrative or professional
C2	Skilled manual workers
D	Semi and unskilled manual workers
E	State pensioners etc, with no other earnings

Acronyms

BME	Black and Minority Ethnic
DfT	Department for Transport
DSA	Driving Standards Agency
DVLA	Driver and Vehicle Licensing Agency
HA	Housing Authority
HH	Household
LA	Local Authority
VOSA	Vehicle and Operator Services Agency