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AA Member eco-driver survey



ResearchFoundation

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**Energy Efficiency and
Conservation Authority**
Te Tari Tiaki Pūngao

Project

This AA Member survey is part of the AA Research Foundation eco-drive research programme. The programme is a cooperative research effort by the New Zealand Automobile Association Research Foundation, the Energy Efficiency and Conservation Authority and the Ministry of Transport.

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Executive summary

The New Zealand Automobile Association is New Zealand's largest incorporated society with over 850,000 Members or a quarter of all licensed drivers. This survey was intended to determine the interest of AA Members in fuel-efficient driving, their ability to do it and the attitudes which might shape their ability to successfully maintain fuel-efficient driving methods. It was also designed to determine how well the existing eco-driving information campaign by EECA and the AA was being absorbed.

The survey captured 2,449 responses, with a valid sample of the drivers who undertake 84% of the mileage on New Zealand roads according to the Ministry of Transport's Household Travel Survey. It did not obtain good sub-samples of younger or older New Zealanders. The focus of these results is therefore on four groups: men 25 to 44; women 25 to 44; men 45 to 64; and women 45 to 64.

Given their low mileage and slow driving style, it is implicitly obvious there is little to be gained from instructing older people in fuel-efficient driving. To a certain extent they tend to do it anyway. Younger drivers are least likely to be motivated towards eco-driving and they also drive relatively few kilometres. These groups between 25 and 64 are therefore the most important with respect to eco-driving knowledge and behaviour.

The survey did confirm a few stereotypes that might have been assumed anyway.

1. Most drivers think they are better than average and very few say they are prepared to invest a realistic sum of money in driver training.
2. Younger drivers are less likely to be able to recall unprompted a valid eco-driving tip than older drivers, with men being slightly better at it than women.
3. Men generally spend less on fuel per kilometre driven, and are more interested in the technicalities of driving and maintaining their vehicles than women. They were more likely to respond to higher fuel prices by changing their driving than by doing other things like taking the bus.
4. Women are more likely to spend more on fuel per kilometre driven, drive smaller vehicles, and be more organised but less interested in the technicalities of driving or maintaining their vehicles (eg tyre pressures) than men.
5. Men aged 25 to 44 are less interested in slowing down, more disorganised and slightly more status-conscious than the other groups.
6. Women aged 25 to 44 do more multi-tasking, and are more likely to get eco-driving tips from a friend or relative.
7. Men aged 45 to 54 are much less interested in getting out of their cars, and tend to drive more larger cars than other groups. They are also more likely to work in a job that involves driving.
8. People who felt more confident about their day-to-day finances were less likely to be concerned about cutting back their fuel use.

The survey also raised some interesting points:

1. Eco-driving is a very popular concept, with 88% support.

2. The workplace was not generally a source of eco-driving tips but respondents generally supported making fuel-monitoring and driver training compulsory in workplaces.
3. People were more interested in learning defensive driving than eco-driving (but as there is so much overlap it may be possible to link these in practice).
4. No group showed the ability to correctly evaluate whether a \$225 eco-driving course would pay for itself inside a year.
5. Women aged 45 to 64 were least likely to benefit from eco-driving courses in the first year.
6. The most favoured incentive (other than immediate fuel savings) was discounts.
7. Some 22% claimed their vehicle has a fuel-consumption display
8. Many respondents tended to associate fuel-efficient driving with open-road driving styles even though most drivers did most of their driving in town. The idea of fuel-efficient urban driving is not as well established.
9. The claimed preferred qualities of vehicles can be interpreted by purchasers in such a way as to justify any eventual vehicle purchase.
10. There was good recall of the EECA/AA TV commercial but women aged 25 to 44 tended to recall the "reduce vehicle weight" tip twice as much as other groups.
11. The low-acceleration message is well understood by all groups, but less favoured by younger men.

Conclusion

The Household Travel Survey shows that males aged 25 to 64 do 47% of the kilometres driven on New Zealand's roads. By contrast women the same age do 32%. Achieving acceptance of an eco-driving culture with males will therefore have more effect than with females. Given the safety benefits of fuel-efficient driving, this would also have an effect on the crash-rate, which is also higher with this group.

Younger males (25-44) are building status in their community whereas older males (45-64) are trying to maintain the status they already have. The association between status and SUVs and larger cars is unlikely to change. What may change is the emphasis by automakers on the fuel efficiency of these vehicles to reflect changing values.

The association between reduced braking and slower acceleration with fuel-efficient driving is already well established in the public mind. The difficulty is convincing younger males (in particular) that driving in this manner will build their status, rather than relying on speed.

Men are more interested in knowing how to get more out of their machines than women and may acquire status from this sort of competition.

An observation, not reflected in the survey, is that during the 25 to 44 age range many people have children and the transition from young adult to parent is one which forces a change of circumstances (financial) and outlook (safety) that could be tied to a fuel-efficient driving message.

It was clear that no signals for fuel-efficient driving are being transmitted by employers and respondents would be happy to see those signals brought in.

There appears to be scope for a fuel-efficient driving scheme if it can offer some form of discount incentives.

The Survey

Objective

The objective of the survey was to identify the characteristics of AA Members who may gain the greatest benefit from safe and fuel-efficient driver-education information and programmes and the extent to which they are interested in and prepared to pay for this benefit.

The AA

The Membership of the New Zealand Automobile Association stands at 852,947 individual members making it the largest incorporated society in New Zealand. This is roughly a quarter of all car licenses in New Zealand (although an unknown number of licensed drivers reside overseas).

Table 1 AA population

AA Members	AA Email list	AA email list percentage	Total AA Membership	Membership percentage
15-24	37,082	10.5%	67,576	7.9%
25-34	52,618	14.9%	82,042	9.6%
35-44	75,015	21.2%	135,993	15.9%
45-54	78,240	22.1%	175,427	20.6%
55-64	63,854	18.0%	167,926	19.7%
65 and over	47,479	13.4%	223,983	26.3%
Total	354,288	100.0%	852,947	100.0%

The proportions of AA Members by age is heavily weighted towards the older age group. However, the proportions able to respond to AA email surveys are somewhat different.

AA Membership under-represents people with low discretionary income (it is a paid voluntary club). This tends to also mean lower rates of participation by ethnic groups in that category.

The public

The MoT Household Travel Survey shows that the total number of kilometres driven rises until age 54 and then declines again. There is also a strong gender difference between males and females.

Table 2 Household Travel Survey Data

Age group	Male M km	Female M km	Male %	Female %
15-24	1959	1361	7%	5%
25-34	2956	2114	10%	7%
35-44	3958	2842	13%	10%
45-54	3896	2674	13%	9%
55-64	3079	1687	10%	6%

65-74	1489	654	5%	2%
75+	537	229	2%	1%

The MoT calculates an average New Zealand light passenger vehicle fuel-efficiency rate of around 10 litres per 100km or 10km per litre. Obviously the type of vehicle driven will make a difference to the amount of fuel expended per kilometre travelled. However, it is fairly evident here that the 25 to 54 age category drives the most kilometres with a males driving 50% more kilometres on average.

AA email survey methodology

The AA surveys its members on a regular basis. Questionnaires are developed in association with stakeholders - in this case: MoT, EECA and TERNZ representatives. This establishes the content requirement.

The second stage is simplification and external auditing. The survey is checked by external questionnaire consultant Kim Saffron to ensure leading questions and confusion are reduced. The questionnaire is then tested by a naïve group to determine whether further options are needed.

Sampling

This survey was based on a simple random sample of 12,000 AA Members. We did not see any particular point in stratifying the sample or introducing quotas at this stage as we expected reasonable responses from each age and gender category to occur naturally.

Invitation

Invitations were dispatched by email on 18 May 2011 eliciting a response as follows.

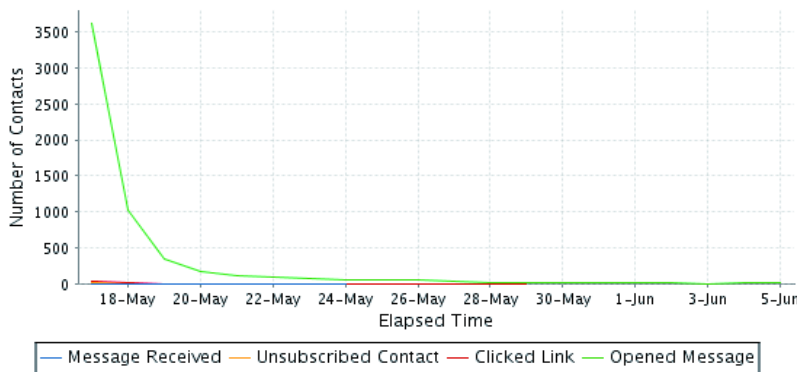


Figure 1 18-May transmission graph

A reminder was dispatched to the same group on 26th of May 2011 with the following results.

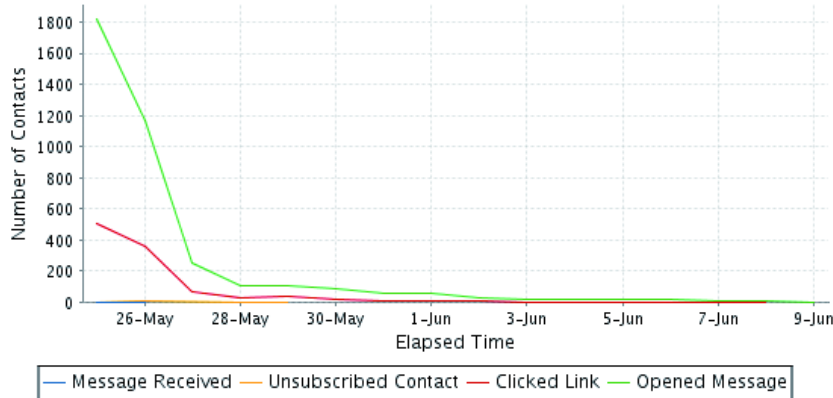


Figure 2, 26 May transmission graph

Although 339 links were forwarded the software ensured only those invited could respond. The survey closed 1 June 2011.

Response demographics

Responses were collected from 2,449 people.

Table 3 Response demographics

Age	Male	Female	Male %	Female %	Total %
Up to 24	45	83	1.8%	3.4%	5%
25-34	165	171	6.7%	7.0%	14%
35-44	207	312	8.5%	12.7%	21%
45-54	341	366	13.9%	14.9%	29%
55-64	338	354	13.8%	14.5%	28%
65 or older	44	23	1.8%	0.9%	3%
Total	1140	1309	47%	53%	100%
n=	2449				

This response was unusual because of a female bias across all age segments and a very low response from the traditionally responsive 65 or older category.

Margins of error (95% confidence interval) for each category can be calculated from AA population proportions.

Table 4 Margins of error by demographic

Age	Male	Female
Up to 24	6%	5%
25-34	4%	4%
35-44	4%	4%
45-54	3%	3%

55-64	3%	3%
65 or older	8%	9%

This essentially means that the survey has limited accuracy for both older and younger AA Members. Fortunately our focus is on those with high mileages, who are in neither category.

Question Types

The questionnaire focused on the following main areas.

- The types of car Members use and their motivations for choosing that sort of vehicle.
- The ability of Members to estimate their fuel efficiency and their degree of interest in fuel efficiency.
- Members' ability to recall (unprompted) valid fuel efficient driving tips.
- Members' interest in driver training.
- Members' views of various policy options.

This report will largely exclude over-65s and under 24s for two main reasons. First, the margins of error are high, and second, the Household Travel Survey mileages are low. However a few initial points should be made about these groups.

Younger and Older Drivers

The average number of unprompted valid fuel-saving tips (out of a possible three) that could be recalled by Members increased with age.

Table 5 Valid fuel-saving tips by age

Age	Male	Female
Up to 24	1.6	1.6
25-34	1.8	1.8
35-44	2.0	1.8
45-54	1.9	1.9
55-64	1.9	1.7
65 or older	2.0	2.0

When these figures were weighted by drivers' self-reported propensity to follow their own tips and multiplied by the technical saving value of the tips themselves, they further showed (increasing margins for error, indicated in grey, notwithstanding) that older drivers are more likely to follow their own good advice.

Table 6 Fuel-saving tip application scores

Average score as % of possible maximum	Male	Female
Up to 24	28%	29%
25-34	34%	32%
35-44	37%	33%
45-54	40%	39%
55-64	41%	36%
65 or older	46%	44%

In short, it appears that younger drivers are less aware of fuel-saving driving techniques than older drivers. While both groups of drivers have low mileage, it seems that older drivers are more likely to follow fuel-saving driving techniques (in particular, reduced acceleration). This suggests there is very

little to be gained from educating older drivers about safer and more fuel-efficient driving because, they are more likely to (in the words of one respondent) “drive like a nana” anyway.

Groups

Given this the survey response was divided into four groups as follows

Table 7 Group qualities

	Gender	Age band	M Km	% Km	n	MoE
Group A	Male	25-44	6914	23%	372	±3.7%
Group B	Female	25-44	4956	17%	483	±3.5%
Group C	Male	45-64	6975	24%	679	±2.9%
Group D	Female	45-64	5753	15%	720	±2.9%
Total					84%	

Typically these groups divide into younger and older families, although no questions on household composition were included.

Self-reported driving by group

Table 8 Self-reported driving by group

	Average annual estimated mileage	Avge estimated weekly fuel spend	Cents per Km
A	13,835km	\$68	26
B	11,121km	\$61	29
C	16,753km	\$84	26
D	10,585km	\$68	33

While all this data is unvalidated, it shows on a self-reported basis that the male groups spend less per kilometre (on average) than the female groups. It was, however, difficult to correlate vehicle size with mileage because the best estimates of mileage were by people who tended to have higher mileage, so the quality of data was skewed to higher values.

Self-reported main vehicle by group

Table 9 Self-reported main vehicle by group

Group	Up to 125cc MC	126cc plus MC	Small car or station wagon (under 1.7L)	Medium car or station wagon (1.7L - 2.7L)	Large car or station wagon over 2.7L	People-mover or van	SUV, Ute or 4-wheel drive over 2.7L	Truck, bus or campervan
A	0.8%	2.4%	19.1%	48.4%	9.1%	5.9%	13.7%	0.5%

B	0.8%	0.2%	27.1%	49.1%	4.6%	10.4%	7.9%	0.0%
C	0.4%	0.9%	16.2%	41.1%	14.5%	6.1%	19.4%	1.5%
D	0.3%	0.1%	36.4%	42.2%	8.8%	4.9%	7.2%	0.1%

The male A and C groups have a smaller share of small cars and a larger share of large cars and SUVs.

Vehicle efficiency estimates

Table 10 Fuel efficiency estimates by vehicle class

Vehicle type	Estimated litres 100km	Sample size
Up to 125cc MC	4.8	4
126cc plus MC	6.0	13
Small car or station wagon (under 1.7L)	9.3	270
Medium car or station wagon (1.7L - 2.7L)	9.9	548
Large car or station wagon over 2.7L	11.0	140
People-mover or van	10.8	81
SUV, Ute or 4-wheel drive over 2.7L	11.1	182
Truck ,bus or campervan	17.3	7

The estimates for fuel-efficiency by respondents are (on average) surprisingly accurate. The people-mover category may be somewhat low. The overall average was 10.1?/100km, which is very close to the Ministry of Transport estimated New Zealand fleet average.

Motivations to purchase types of vehicle by group

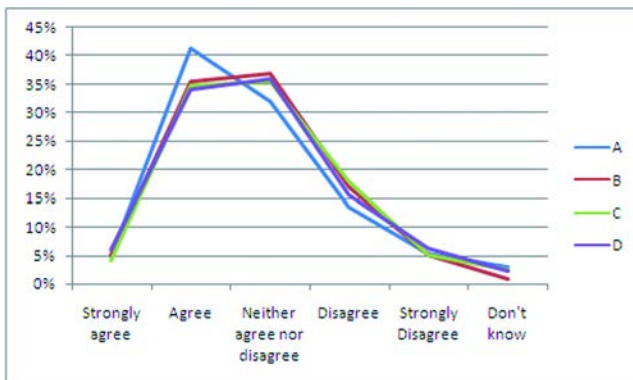


Figure 3 Extent feel judged by vehicle

In response to the question:

What do you think of the statement "I think people judge you by your car or motorbike"

A third agreed, although group A (males aged 25 to 44) agreed slightly more than other groups. This was an attempt to gauge the degree to which a car is thought to reflect status.

Desired qualities of current vehicle

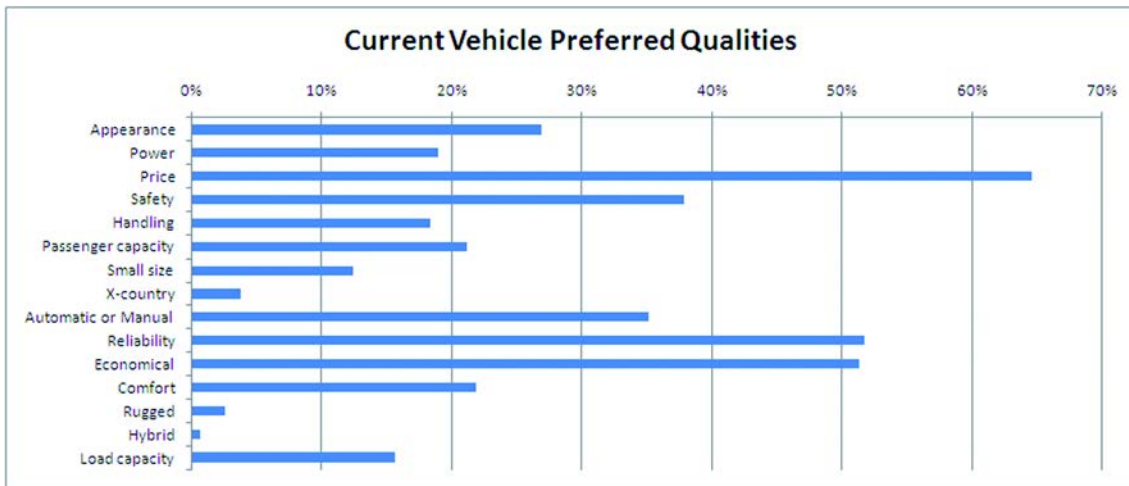


Figure 4 Preferred qualities of vehicles

Interestingly there was very little difference between the groups in their four most preferred qualities. Women were slightly more keen on specifying the gearbox, but only just over the margin of error.

The vehicles were 87.9% petrol, 1.1% petrol hybrid and 10.6% diesel; 70.7% were automatic or semi automatic. Some 22% claimed their vehicle had a fuel consumption display and 45% claimed their car had a trip computer which they used. These are unexpectedly high results.

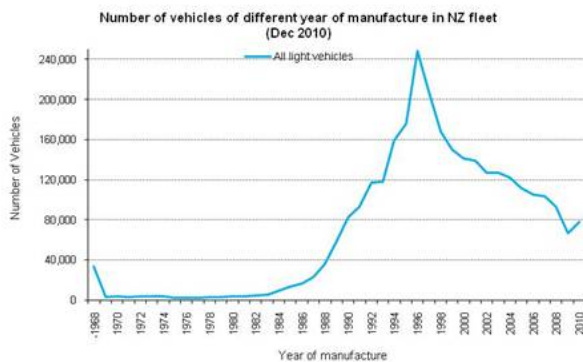


Figure 5 NZ vehicle fleet by age

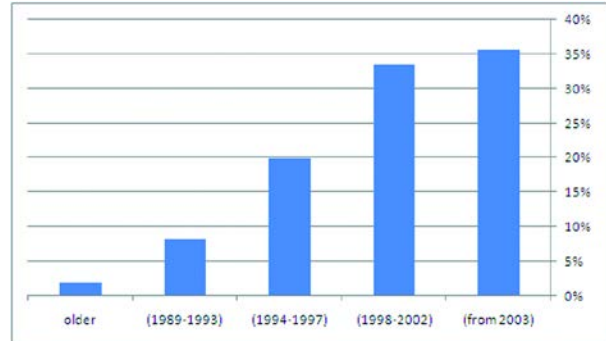


Figure 6 Sample vehicle fleet by age

The age of the vehicles in the sample is surprising. On the left is the population of registered vehicles sourced from the NZTA; on the right the sample response. This suggests the age of the vehicles in this sample is younger than the fleet average. This may indicate a bias associated with AA Membership and email sampling.

Shared use of main vehicle

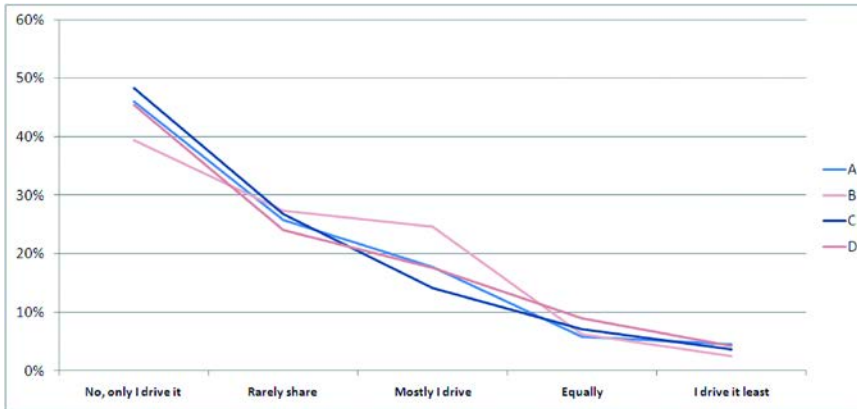


Figure 7 Shared use of main vehicle by group

Most respondents had their own vehicle with around 90% “mostly” driving it or more.

Younger females were less likely to have exclusive access to a vehicle but the difference was not much.

Comment on vehicle-quality findings

Younger men appear to see slightly more status in vehicles than older men or women. However, older men drive more larger cars and SUVs than any other group. It is notable that while there is very little disagreement between the groups about the four most important qualities of a vehicle, women end up driving more smaller vehicles than men, and men end up driving more larger vehicles and SUVs.

Prospects for a replacement vehicle

The groups’ preferences for a replacement vehicle were not significantly different from their preferences for their current vehicle.

Locations and drive-cycles

The response sample was generally evenly distributed around each geographic location except that men aged 25 to 44 were under-represented in rural areas, and over-represented in Auckland and Hamilton, Tauranga or Dunedin. Older women were under-represented in Auckland and over-represented in rural areas.

Table 11 Domicile by group

	Rural	Town	Hamilton, Tauranga, Dunedin	Christchurch	Wellington	Auckland	Average
A	9%	14%	21%	15%	15%	21%	16%
B	19%	18%	24%	20%	21%	25%	21%
C	33%	32%	29%	29%	30%	28%	30%
D	38%	36%	26%	35%	35%	26%	33%

Table 12 Drive-cycle by group

	Almost all on the open road	Mostly open road, some town	Equally town and open road	Mostly town, some open road	Only around town
A	1%	17%	21%	46%	15%
B	1%	12%	18%	52%	16%
C	4%	18%	24%	44%	10%
D	2%	15%	16%	52%	16%

The male groups had a slightly greater representation of people who drove more on the open road.

In response to the question “where do you usually work?”:

Table 13 Nature of workplace by group

Age	Home	Outdoors	Commute	Worksite	Visits	Mobile	Driver	Other
A	12%	5%	60%	6%	3%	7%	2%	6%
B	16%	2%	65%	4%	4%	3%	1%	5%
C	16%	5%	52%	7%	3%	9%	2%	7%
D	15%	3%	62%	3%	6%	4%	0%	6%
Average	15%	4%	60%	5%	4%	6%	1%	6%

The C group (males aged 45 to 64) was notably different from the others in that it contained notably fewer commuters and more mobile service providers.

Commentary

The respondents were largely urban drivers who commuted to and from a single workplace.

Fuel purchasing and vehicle-use habits and dispositions

Fuel discount coupons

To a certain extent the use of fuel-discount coupons is a proxy for price-sensitivity; however, there are also sociological limits to this.

The response of the groups to the questions:

Do you collect fuel-discount coupons?

and

How do you feel about your day-to-day finances at the moment?

were notably different.

Table 14 Fuel-discount use and financial security by group

Group	Always	Usually	Sometimes	Never		Happy	Comfortable	Cautious	Worried
A	25%	28%	32%	15%	A	10%	36%	41%	13%
B	39%	20%	31%	10%	B	6%	32%	49%	13%
C	35%	23%	27%	15%	C	8%	32%	46%	14%
D	42%	26%	23%	9%	D	7%	30%	46%	16%
Use discount coupons					Feel about day-to-day finances				

Women were more likely to "always" use discount coupons, with older women showing the most enthusiasm. However older men were not far behind the younger women.

The younger men (25 to 44) claimed they were more confident about their day-to-day finances than any other group.

Compared to the overall average, younger men were more likely to use discount coupons "sometimes" if they were "happy" or "comfortable" with their day-to-day finances and less likely than the average for all respondents if they were "cautious" or "worried".

The younger women were more likely than the average to use them if they were "comfortable", or "cautious".

The older men (aged 45 to 65) were less likely than the average to use them "usually" if they felt "comfortable".

Older women were more likely to use them more often than the average if "cautious" or "worried".

Tyres

Maintaining correct tyre pressure is a simple way to reduce the rolling resistance and fuel consumption of a motor vehicle.

We asked respondents if they had checked their vehicle’s tyre pressure in the past 30 days.

Table 15 Tyre checks by group

Group	A	B	C	D
Not checked	37%	55%	37%	51%
Checked	63%	43%	62%	48%

The female groups B and D were less likely to have checked their tyre pressure than the males. Given a choice of reasons for this they responded along gender lines as well.

Table 16 Reasons for not checking tyre pressures by group

	Forget to do it	Takes too long	Can't be bothered	Don't know what the pressure should be	Don't know how to use	Looks dirty	Don't like it	Leave it to partner	Staff don't help	Don't know how
A	43%	4%	18%	10%	0%	0%	1%	1%	4%	3%
B	34%	3%	7%	18%	9%	1%	3%	25%	5%	4%
C	41%	4%	15%	4%	0%	0%	1%	1%	1%	7%
D	28%	1%	3%	14%	9%	1%	5%	21%	7%	6%

The question allowed respondents to tick any of the above boxes they liked. The notable differences are by gender. The men (A and C) say they “forget” more than the women and that they “can’t be bothered”. The women say they “leave it to their partner” and “don’t know what pressure it should be”. In other words, it’s fairly clear that some women tend to leave car maintenance to the men.

Price signal to cut back

In response to the question:

“At what fuel price have, or would, you think about cutting back on fuel usage?”

Table 17 Fuel-price trigger by financial security category

By financial confidence group	Happy	Comfortable	Cautious	Worried	Total
I always try to cut fuel costs	22%	28%	34%	37%	25%
\$1.50 to \$1.79	1%	1%	2%	6%	4%
\$1.80 to \$2.09	4%	8%	10%	12%	11%
\$2.10 to \$2.50	11%	16%	24%	19%	19%
\$2.51 to \$2.99	15%	12%	9%	7%	10%
\$3 or more	13%	9%	5%	5%	10%
Don't know / haven't thought about it	17%	15%	12%	10%	13%
I won't ever cut back	17%	10%	4%	3%	8%
Total	9%	34%	44%	12%	100%

There was only one demographic group notably different from the sample average. The A group (men aged 25 to 44) was less likely to “always try to cut fuel costs” than the others; otherwise, financial confidence was the main explanatory variable. At the time of the survey the price was in the \$2.10 to \$2.50 range and this was made clear on the questionnaire.

Responses to high fuel prices

If you are cutting back on fuel use what do you do?

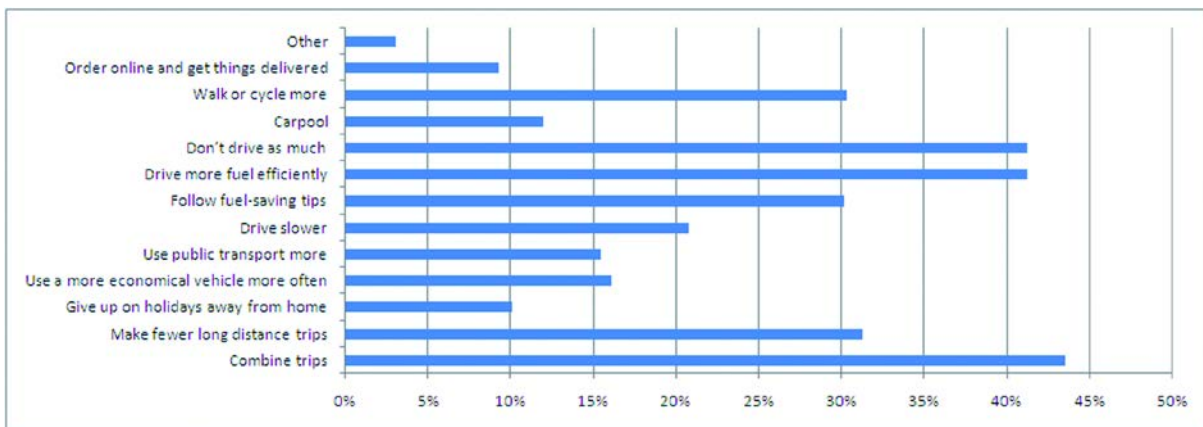


Figure 8 Responses to fuel-price triggers

Respondents could choose any or all of the above options.

The groups responded differently along gender and age lines.

Table 18 Responses to price triggers by group

Group	Combine trips	Fewer longer trips	Give up holidays	Use more economical vehicle	Use PT	Drive Slower	Follow fuel saving tips	Drive more fuel efficiently	Don't drive as much	Carpool	Walk or Cycle more	Use online services
A	33%	30%	10%	20%	19%	22%	30%	47%	38%	12%	32%	10%
B	53%	33%	14%	16%	18%	17%	30%	34%	49%	16%	34%	12%
C	35%	25%	7%	18%	9%	20%	26%	42%	29%	6%	21%	7%
D	43%	29%	8%	11%	12%	19%	29%	35%	39%	10%	30%	8%

The female groups (B and D) were more likely to combine trips, carpool, and not drive as much. The male groups were more likely to “drive more fuel efficiently”.

The younger groups (25 to 44) were more likely to give up a holiday, use public transport, carpool, walk or cycle more or use more online services.

It was notable that the older male group was significantly less likely to give up their cars (walk or cycle, use public transport, or carpool) than all the other groups.

Adopting a driving style to reduce fuel consumption

Response to the question:

Do you use a driving style that you think will give you better fuel consumption?



Figure 9 Use of fuel-efficient driving style by group

Younger people are less enthusiastic about a lower-energy driving styles (52% and 50% for male and female 25 to 44 year-olds in the “always” and “usually” categories compared to 72% and 70% for male and female 45 to 64 year -olds). Interestingly older men are more interested in lower-energy driving styles than any other group. On the other hand they are less interested in any other techniques than any other group.

Self-rating as a driver



Figure 10 Self-rating by group

The self-enhancement bias for respondents was predictable and evident. Most drivers think they are good. The younger male group are more likely to rate themselves “excellent” than the other groups.

Unprompted eco-driving tips

In order to determine whether messages regarding fuel-efficient driving from the EECA and AA were getting through to drivers, we asked respondents an unprompted open-text question to provide a fuel-efficient driving tip. The question text was:

Without looking it up, can you give a tip for reducing fuel consumption while driving? Please type it in.

If they provided one tip, they were asked for another, to a maximum of three.

Tips were coded into categories according to their fuel-efficiency saving rating as determined by AA Technical.

Table 19 Fuel-saving tip code sheet

Tip Coding	Category	Efficiency Value	Score
0	Invalid tip		0
1	Light acceleration and braking	20%	10
2	Weight reduction	11.11%	5.5
3	Aircon and internal energy reduktiion	8.68%	4.3
4	Tyre inflation and maintenance	4.71%	2.3
5	Drag reduction	8%	4
6	Switch off rather than idle	3%	1.2
7	Vehicle tuning	1%	1
8	Use of instruments to assist driving	1%	1
9	Route planning and non-car-use	?	3

Rules:

- Each respondent was allowed only one instance of any tip category
- Repetitions were coded at zero
- A generous interpretation of text was allowed
- "Stick to speed limits" was not coded as 1 but 0 as this is expected
- "Use cruise control" was not in and of itself coded as eco-driving

The question invalidated non-car-use ("while driving") but we allowed a value for the tip anyway.

Table 20 Tip employment weighting score

Score	Tip Employment
1	I never or almost never do this
3	I sometimes do this
6	I usually do this
9	I always or almost always do this

This meant a maximum score of $(10 \times 9) + (5.5 \times 9) + (4.3 \times 9) = 178.2$ was possible.

Tip counts per group

Table 21 Tip count by group

Tip count	A	B	C	D
0	15%	15%	11%	14%
1	17%	23%	20%	20%
2	32%	33%	37%	39%
3	37%	29%	32%	27%

The older male group had the smallest proportion offering no fuel-efficient driving tips, but the young male group had greatest proportion offering three tips out of three.

Breakdown of tips by group

Table 22 Tip citation by group

Tip code	A	B	C	D	Explanation
0	7%	9%	6%	9%	Invalid tip
1	55%	49%	64%	60%	Light acceleration and braking
2	6%	11%	3%	5%	Weight reduction
3	5%	8%	4%	7%	Aircon and internal energy reduction
4	21%	18%	21%	16%	Tyre inflation and maintenance
5	1%	3%	2%	2%	Drag reduction
6	0%	0%	0%	0%	Switch off rather than idle
7	0%	1%	1%	1%	Vehicle tuning
8	0%	0%	0%	0%	Use of instruments to assist driving
9	3%	0%	0%	1%	Route planning and non-car-use
	100%	100%	100%	100%	

The tip best known by known to the groups was that lighter acceleration and lower speeds improve fuel economy. Unfortunately the questionnaire may itself have prompted recall of tyre inflation because it had an earlier question about it.

Propensity to heed own tips

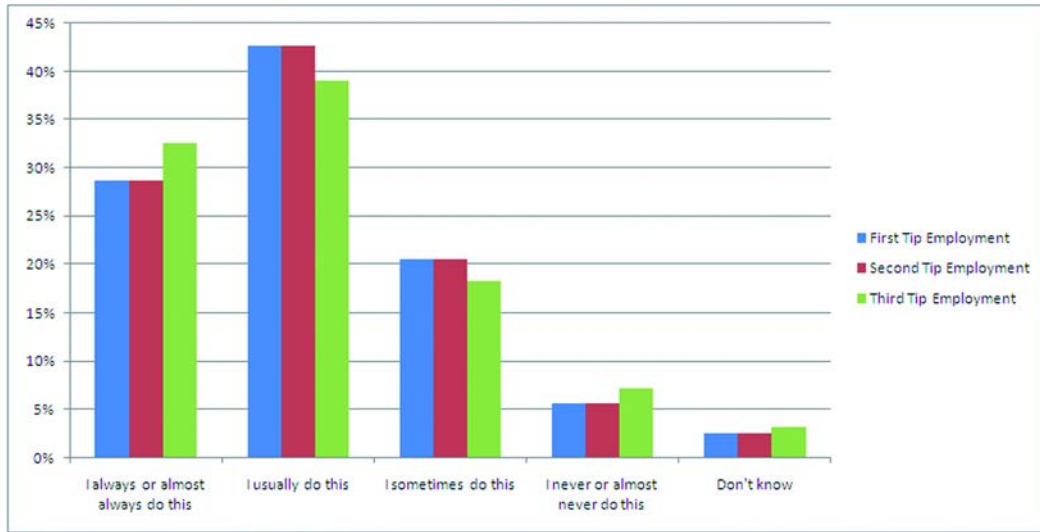


Figure 11 Tip-heeding rates

Table 23 Tip scores by group

Group	Of max score	Band of two thirds of respondents	
	Average	Upper	Lower
A	36%	59%	12%
B	32%	56%	9%
C	41%	64%	17%
D	38%	62%	13%

Applying the weighting for fuel efficiency and tip employment shows that the older groups are more likely to follow their own advice (notably about acceleration and speed). The younger female group had the lowest score for tip efficiency and employment. The range of scores that covered the middle two-thirds of the respondents was very similar for all groups.

Source of tips

Table 24 Origins of tips

Group	Haven't	Friends and relatives	Work	Radio	Print	TV	Website
A	7%	18%	6%	19%	22%	48%	24%
B	5%	31%	4%	13%	17%	42%	14%
C	6%	11%	6%	18%	32%	43%	14%
D	5%	23%	4%	14%	25%	40%	9%

The sources of fuel-efficient driving tips are instructive. Friends and relatives were notably more important to women (B and D) than men. Radio and print were more recalled by men (A and C) than

women. TV had high recall to all groups. Websites were recalled by younger men but not by older women. It was notable that Work scored poorly for all groups.

Commentary

EECA can be reasonably happy with the recall of its TVC campaign though it's not as clear from the nature of the tips recalled that all the messages in its advertising are recalled when a survey asks out-of-the-blue for a respondent to recall a tip.

The low value of "work" as a source of fuel saving tips is notable given people spend most of their waking hours there.

Education

Asked: **What would you be prepared to pay for a professional training session to improve some aspect of your driving?**

Table 25 Propensity to pay for driver training

	A	B	C	D
Nothing	40%	42%	47%	38%
Up to \$100	29%	35%	26%	37%
\$100 to \$200	13%	9%	12%	6%
\$200 to \$300	3%	1%	4%	1%
\$300 or more	2%	0%	1%	0%
Don't know	13%	13%	11%	18%

There was not much support for professional driving instruction and very little at anything like realistic (\$200) cost levels. Males were surprisingly more interested (5% vs 1%) in paying \$200 or more than females. Older males were, however, least likely to want to pay anything.

Those who said they were prepared to pay for professional training were asked what they would be prepared to pay for.

Table 26 Driver training interest topics

	Faster driving	Gravel driving	Trailers or licences	Defensive driving	Better fuel economy
A	9%	19%	22%	33%	17%
B	2%	15%	20%	41%	21%
C	5%	15%	13%	44%	23%
D	1%	8%	16%	48%	27%

Defensive-driving was the most preferred training topic, but better fuel-economy was the second most favoured by all except the younger males.

Of those who said they weren't prepared to pay, the reasons why not varied by gender.

Table 27 Reasons for not paying for driver training

	Good enough now	No value for money	Cheaper to self-educate	Can't afford it
A	42%	22%	9%	26%
B	32%	12%	8%	48%
C	47%	22%	9%	22%
D	37%	7%	6%	49%

Males were more likely to claim they were "good enough now" and question the "value for money", whereas females were more likely to simply say they couldn't afford it.

Specific training course proposal

AA Driver Training, in conjunction with Peugeot, developed a two-hour eco-driving course for purchasers of the Peugeot 308XSP, a vehicle with many fuel efficiency features. The cost of the course was \$225 including GST. We asked if respondents thought it would pay for itself within a year.

Question: **Do you think a two-hour driver training course costing \$225 to show you how to save money on fuel would pay for itself in a year?**

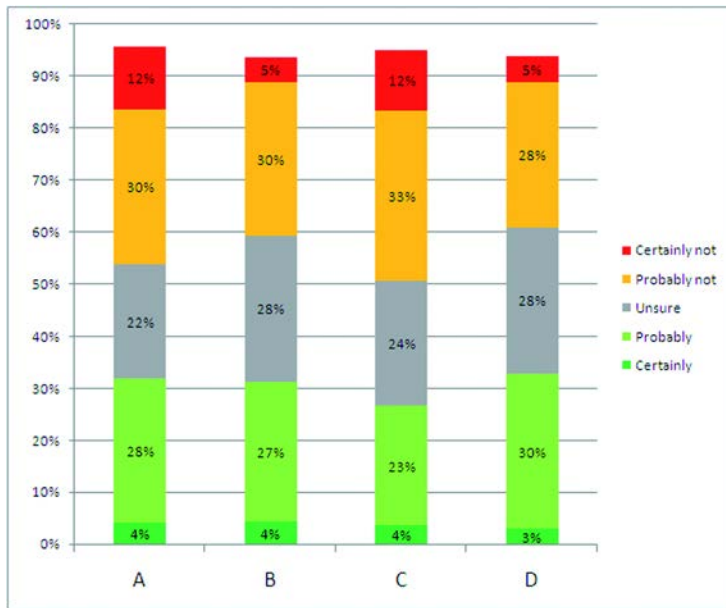


Figure 12 Estimated likelihood of payback on driver training

By taking the average of the weekly fuel consumption for each group and multiplying it up to for annual consumption, we get the following annual averages.

Table 28 Annual average fuel costs by estimate category

	A	B	C	D
Certainly	\$ 3,529	\$ 3,145	\$ 5,365	\$ 2,522
Probably	\$ 3,966	\$ 3,325	\$ 5,768	\$ 5,452
Unsure	\$ 3,469	\$ 3,255	\$ 4,051	\$ 2,948
Probably not	\$ 3,480	\$ 3,058	\$ 3,837	\$ 2,742
Certainly not	\$ 3,449	\$ 3,605	\$ 3,261	\$ 2,062
Don't know	\$ 2,870	\$ 2,548	\$ 4,906	\$ 2,846

As it happens, the estimated gain from fuel-efficiency education for fleets is around 10%. However at a 7.5% fuel saving, nearly all the groups except the older women would achieve a pay-back within a year.

Table 29 Payback on driver training based on own weekly fuel costs

Fuel saving 7.5%	A	B	C	D
Certainly	\$ 265	\$ 236	\$ 402	\$ 189
Probably	\$ 297	\$ 249	\$ 433	\$ 409
Unsure	\$ 260	\$ 244	\$ 304	\$ 221
Probably not	\$ 261	\$ 229	\$ 288	\$ 206
Certainly not	\$ 259	\$ 270	\$ 245	\$ 155
Don't know	\$ 215	\$ 191	\$ 368	\$ 213

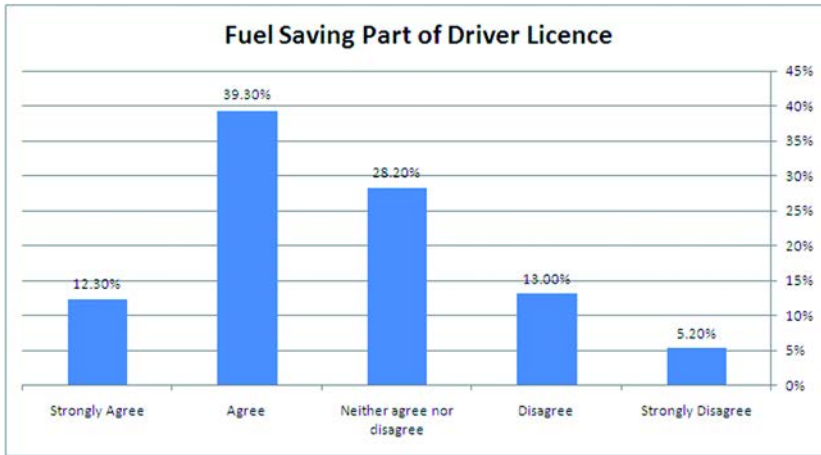
Values in green are greater than \$225. Values in red are less.

This shows a distinct inability to make accurate estimates by all groups except older women (aged 45 to 64).

Policy options

From the entire response sample of 2,449 with a margin of error of 2%

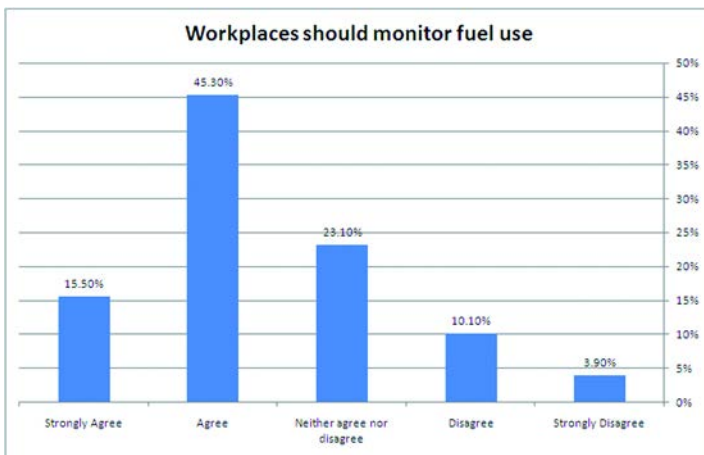
What do you think of the idea that fuel-saving techniques should be a compulsory part of driver licensing?



Support for the proposal is 51.6% while opposition is 17.2%

Figure 13 Fuel-efficiency driver training in licensing process

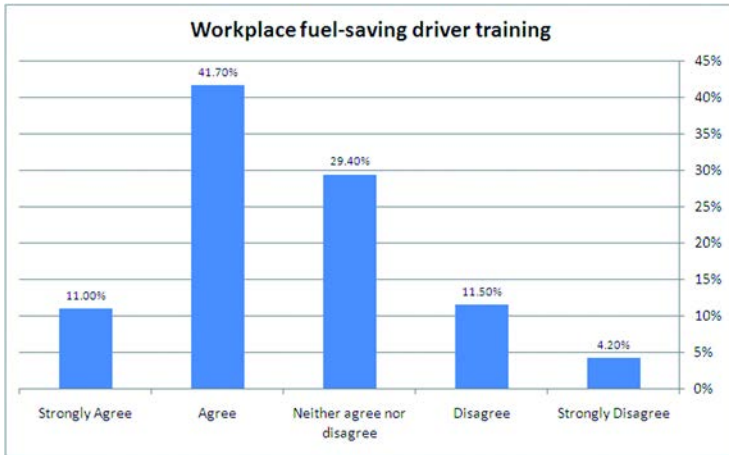
What do you think of this idea: workplaces that provide cars should be required to monitor fuel use?



Support for the proposal is 60.8% and opposition is 14%

Figure 14 Workplace monitoring of fuel usage

What do you think of this idea: workplaces that provide cars should be required to provide training in fuel-saving driving?



Support for the proposal was 52.7%; opposition was 15.7%

Figure 15 Workplace driver-training

Driving to conserve fuel is called "eco-driving". What do you think of promoting this practice in New Zealand?

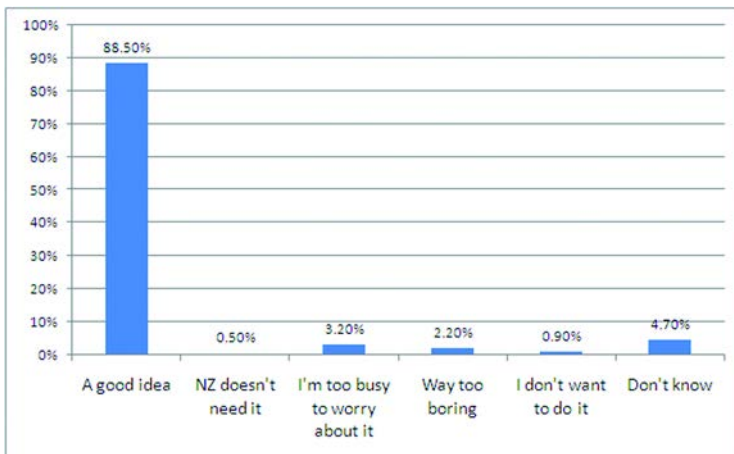


Figure 16 Eco-driving support

Commentary

The respondents were in favour of “eco-driving” and generally positive toward the incorporating it into the driver-licensing process and mandatorily incorporating it into workplace processes.

Voluntary action and potential partners.

Would you be interested in joining an incentive scheme to encourage eco-driving?

Table 30 Support for fuel-efficient driver-incentive scheme

Incentive scheme	A	B	C	D
Yes	41%	38%	34%	37%
No	31%	20%	33%	24%
Don't know	28%	41%	33%	38%

Those who answered yes were further asked:

What incentives would you want to see from an incentive scheme?

Table 31 Incentives valued

	Actual savings	Information	Social support	Prizes	Recognition	Discounts	Airpoints	Rewards points	Competitions
A	55%	19%	5%	22%	9%	56%	19%	27%	9%
B	71%	21%	4%	26%	9%	67%	20%	39%	16%
C	54%	19%	5%	8%	7%	49%	12%	22%	3%
D	65%	28%	5%	11%	12%	59%	19%	32%	9%

Which is your preferred fuel supplier?

Table 32 Preferred fuel supplier

Mostly BP	31%
Mostly Pak'n Save	9%
Mostly Shell	36%
Any petrol station	12%
Mostly Mobil	5%
Mostly Gull	4%
Mostly Challenge	2%
Mostly Chevron	1%
Mostly Gasoline Alley	0%

Do you support or subscribe to any of these environmental organisations?

Table 33 Environmental organisations supported

The Green Party	Greenpeace	Friends of the Earth	Cyclists Advocate Network	Environmental Defence Society	Forest and Bird	Other
6%	9%	3%	3%	1%	11%	3%

Appendix one – Frequency tables

1. Do you drive or ride a motorised road vehicle at least once a fortnight?

Responses	Count	%
Yes	2705	99.00%
No	28	1.00%
Total Responses	2733	
No Responses	0	

2. Which sort of motorised road vehicle do you most often drive or ride most often if it's a motorcycle or motor scooter?

Responses	Count	%
None	16	0.60%
Up to 125cc MC	13	0.50%
126cc plus MC	20	0.70%
Small car or station wagon (under 1.7L)	709	26.40%
Medium car or station wagon (1.7L - 2.7L)	1157	43.10%
People-mover or Van	164	6.10%
Large car or station wagon over 2.7L	246	9.20%
SUV, Ute or 4-wheel drive over 2.7L	299	11.10%
Truck or bus or campervan	17	0.60%
Other	43	1.60%
Total Responses	2684	
No Responses	49	

3. share

Responses	Count	%
No, only I drive it rarely	1201	45.10%
Most	701	26.30%
least	473	17.80%
Yes, we share use of the vehicle equally	96	3.60%
	192	7.20%
Total Responses	2663	
No Responses	70	

4. Fuel Spend

	Count
No Response	197
Minimum	3
Maximum	7500
Average	71.76
Total Responses	2536

5. est distance

Responses	Count	%
Couldn't even guess	265	10.00%
A wild guess	520	19.70%
An informed guess	1294	49.00%
From your records	262	9.90%
From the trip computer	302	11.40%
Total Responses	2643	
No Responses	90	

6. Average Ks

	Count
No Response	383
Minimum	0
Maximum	468000
Average	4588.72
Total Responses	2350

7. Ks per

Responses	Count	%
Year	563	24.00%
Month	128	5.40%
Week	1225	52.10%
Day	434	18.50%
Total Responses	2350	
No Responses	383	

8. Oft driving

Responses	Count	%
I work as a driver	31	1.20%
I usually drive every day	1624	62.40%
I usually drive 3-6 days of the week	706	27.10%
I usually drive on one or two days a week	206	7.90%
I usually drive less often than one day a week	36	1.40%
Total Responses	2603	
No Responses	130	

9. Where drive

Responses	Count	%
Only around town	359	13.80%
Mostly town, some open road	1254	48.20%
Equally town and open road	517	19.90%
Mostly open road, some town	400	15.40%
Almost all on the open road	56	2.20%
Other	17	0.70%

Total Responses	2603
No Responses	130

10. Current qualities

Responses	Count	%
Appearance	698	26.90%
Power	493	19.00%
Price	1676	64.60%
Safety	984	37.90%
Handling	476	18.40%
Passenger capacity	550	21.20%
Small size	325	12.50%
X-country	98	3.80%
Automatic or Manual	912	35.20%
Reliability	1341	51.70%
Economical	1332	51.30%
Comfort	567	21.90%
Rugged	68	2.60%
Hybrid	17	0.70%
Load capacity	406	15.70%
Total Responses	2594	
No Responses	139	

11. Engine

Responses	Count	%
Petrol	2281	87.90%
Hybrid	29	1.10%
Diesel	274	10.60%
Other	10	0.40%
Total Responses	2594	
No Responses	139	

12. gearbox

Responses	Count	%
Automatic	1592	61.40%
Semi-Automatic	242	9.30%
Manual	759	29.30%
Don't know	1	0.00%
Total Responses	2594	
No Responses	139	

13. How old is it?

Responses	Count	%
(from 2003)	927	35.70%
(1998-2002)	870	33.50%
(1994-1997)	519	20.00%

(1989-1993)	216	8.30%
older	53	2.00%
Don't know	9	0.30%
Total Responses	2594	
No Responses	139	

14. Does your vehicle have a trip computer?

Responses	Count	%
Yes, and I use it	1175	45.30%
I think so	253	9.80%
No it doesn't	923	35.60%
Don't know	243	9.40%
Total Responses	2594	
No Responses	139	

15. judging

Responses	Count	%
Strongly Disagree	139	5.40%
Disagree	416	16.10%
Neither agree nor disagree	922	35.60%
Agree	928	35.90%
Strongly agree	124	4.80%
Don't know	59	2.30%
Total Responses	2588	
No Responses	145	

16. replace vehicle

Responses	Count	%
In less than a year's time	272	10.50%
1-2 years	605	23.40%
2 to 4 years	684	26.40%
Later or when it dies	713	27.60%
Never	25	1.00%
Don't know	289	11.20%
Total Responses	2588	
No Responses	145	

17. new vehicle qualities

Responses	Count	%
Appearance	652	25.30%
Power	447	17.30%
Price	1873	72.50%
Safety	1108	42.90%
Passenger capacity	413	16.00%
Small Size	288	11.20%
X-country	91	3.50%

Automatic or Manual	797	30.90%
Reliability	1469	56.90%
Economical	1641	63.60%
Handling	410	15.90%
Comfort	585	22.70%
Rugged	49	1.90%
Hybrid	73	2.80%
Load Capacity	292	11.30%
Total Responses	2582	
No Responses	151	

18. checked tyres

Responses	Count	%
Yes	1369	53.10%
No	1187	46.00%
Can't remember	23	0.90%
Total Responses	2579	
No Responses	154	

19. why not tyre check

Responses	Count	%
Forget	405	33.50%
Takes too long	31	2.60%
Can't be bothered	116	9.60%
Don't know what pressure it should be	148	12.20%
Don't know how to use the pump	70	5.80%
It looks dirty and uncomfortable to check them	11	0.90%
Don't like doing it	33	2.70%
I leave it to my partner	164	13.60%
Service station staff don't seem to want to help	54	4.50%
don't know	70	5.80%
Other	299	24.70%
Total Responses	1209	
No Responses	1524	

20. avge fuel estimate quality

Responses	Count	%
Couldn't even guess	721	28.00%
A wild guess	554	21.50%
An informed guess	781	30.40%
From the trip computer	334	13.00%
From your records	181	7.00%
Total Responses	2571	
No Responses	162	

21. litres per 100km	Count
No Response	1452
Minimum	0
Maximum	25
Average	10.15
Total Responses	1281

22. \$50 on fuel	Count
No Response	1466
Minimum	0
Maximum	750
Average	12.49
Total Responses	1267

23. fuel consumption display	Count	%
Responses		
Yes	574	22.60%
No	1814	71.30%
Don't know	157	6.20%
Total Responses	2545	
No Responses	188	

24. use a driving style	Count	%
Responses		
Never	104	4.10%
Sometimes	733	28.80%
Usually	1251	49.20%
Always	329	12.90%
Don't know	128	5.00%
Total Responses	2545	
No Responses	188	

25. Where fuel?	Count	%
Responses		
Any petrol station	290	11.40%
Mostly BP	734	28.90%
Mostly Shell	865	34.00%
Mostly Gull	106	4.20%
Mostly Chevron	23	0.90%
Mostly Mobil	119	4.70%
Mostly Pak'n Save	209	8.20%
Mostly Gasoline Alley	10	0.40%
Mostly Challenge	39	1.50%
Other	148	5.80%
Total Responses	2543	

No Responses 190

26. discount coupons

Responses	Count	%
Never	357	14.00%
Sometimes	700	27.50%
Usually	604	23.80%
Always	882	34.70%
Total Responses	2543	
No Responses	190	

27. Price to cut back

Responses	Count	%
I always try to cut fuel costs	804	31.60%
\$1.50 to \$1.79	60	2.40%
\$1.80 to \$2.09	230	9.00%
\$2.10 to \$2.50	499	19.60%
\$2.51 to \$2.99	260	10.20%
\$3 or more	179	7.00%
I won't ever cut back	171	6.70%
Don't know / haven't thought about it	339	13.30%
Total Responses	2542	
No Responses	191	

28. why not cut

Responses	Count	%
Fuel is a business expense I can recover	47	26.90%
live in a remote place and can't cut back	29	16.60%
I would rather cut other expenditure	26	14.90%
I can always afford it	49	28.00%
Other	38	21.70%
Total Responses	175	
No Responses	2558	

29. If you are cutting back on fuel use what do you do?

Responses	Count	%
Combine trips	1028	43.50%
Make fewer long distance trips	740	31.30%
Give up on holidays away from home	238	10.10%
Use a more economical vehicle more often	381	16.10%
Use public transport more	366	15.50%
Drive slower	493	20.80%
Follow fuel-saving tips	715	30.20%
Drive more fuel efficiently	975	41.20%
Don't drive as much	975	41.20%
Carpool	283	12.00%

Walk or cycle more	717	30.30%
Order online and get things delivered	220	9.30%
Other	73	3.10%
Total Responses	2365	
No Responses	368	

30. Tip1

	Count
Total Responses	2230
No Response	503

31. Tip R1

Responses	Count	%
I always or almost always do this	657	28.70%
I usually do this	977	42.70%
I sometimes do this	468	20.50%
I never or almost never do this	129	5.60%
Don't know	55	2.40%
Total Responses	2286	
No Responses	447	

32. Tip1

	Count
Total Responses	1986
No Response	747

33. Tip R1

Responses	Count	%
I always or almost always do this	631	31.20%
I usually do this	816	40.30%
I sometimes do this	404	20.00%
I never or almost never do this	132	6.50%
Don't know	41	2.00%
Total Responses	2024	
No Responses	709	

34. Tip1

	Count
Total Responses	1688
No Response	1045

35. Tip R1

Responses	Count	%
I always or almost always do this	558	32.50%
I usually do this	669	39.00%
I sometimes do this	314	18.30%

I never or almost never do this	121	7.10%
Don't know	54	3.10%
Total Responses	1716	
No Responses	1017	

36. heard fuel saving

Responses	Count	%
I haven't	144	6.50%
Friends or relatives	529	23.80%
Work	118	5.30%
Radio	400	18.00%
Print	609	27.40%
TV	1075	48.40%
Website	352	15.80%
Can't remember	357	16.10%
Other	168	7.60%
Total Responses	2221	
No Responses	512	

37. Driving to conserve fuel is called "eco-driving". What do you think of promoting this practice in New Zealand?

Responses	Count	%
A good idea	2227	88.50%
NZ doesn't need it	12	0.50%
I'm too busy to worry about it	81	3.20%
Way too boring	55	2.20%
I don't want to do it	23	0.90%
Don't know	118	4.70%
Total Responses	2516	
No Responses	217	

38. years driving

Responses	Count	%
up to 5	107	4.30%
more than 5 but less than 10	148	5.90%
10 or more but less than 20	401	16.00%
20 or more but less than 50	1790	71.20%
50 or more	68	2.70%
Total Responses	2514	
No Responses	219	

39. How do you rate yourself as a driver?

Responses	Count	%
Excellent	446	17.70%

Good	1622	64.50%
Average	430	17.10%
Poor	9	0.40%
Terrible	2	0.10%
Don't know	5	0.20%
Total Responses	2514	
No Responses	219	

40. What would you be prepared to pay for a professional training session to improve some aspect of your driving?

Responses	Count	%
I wouldn't pay	1058	42.10%
Up to \$100	821	32.70%
\$100 to \$200	237	9.40%
\$200 to \$300	50	2.00%
\$300 or more	12	0.50%
Don't know	336	13.40%
Total Responses	2514	
No Responses	219	

41. what pay to improve

Responses	Count	%
Faster driving	69	6.20%
Defensive driving	725	64.70%
Trailers or different vehicle types	318	28.40%
Driving for better fuel economy	395	35.20%
Off-road or gravel driving	238	21.20%
Other	58	5.20%
Total Responses	1121	
No Responses	1612	

42. Why would you not pay to improve your driving?

Responses	Count	%
Good enough now	552	39.60%
No real value for the money spent	209	15.00%
Cheaper to learn by one-self	113	8.10%
Can't afford it	500	35.90%
Other	174	12.50%
Total Responses	1393	
No Responses	1340	

43. Do you think a two-hour driver training course costing \$225 to show you how to save money on fuel would pay for itself in a year?

Responses	Count	%
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Certainly	89	3.60%
Probably	683	27.30%
Unsure	633	25.30%
Probably not	750	29.90%
Certainly not	205	8.20%
Don't know	146	5.80%
Total Responses	2506	
No Responses	227	

44. What do you think of the idea that fuel-saving techniques should be a compulsory part of driver licensing?

Responses	Count	%
Strongly Disagree	130	5.20%
Disagree	327	13.00%
Neither agree nor disagree	706	28.20%
Agree	984	39.30%
Strongly Agree	307	12.30%
Don't know	52	2.10%
Total Responses	2506	
No Responses	227	

45. What do you think of this idea: workplaces that provide cars should be required to monitor fuel use ?

Responses	Count	%
Strongly Disagree	97	3.90%
Disagree	254	10.10%
Neither agree nor disagree	580	23.10%
Agree	1135	45.30%
Strongly Agree	388	15.50%
Don't know	52	2.10%
Total Responses	2506	
No Responses	227	

46. What do you think of this idea: workplaces that provide cars should be required to provide training in fuel-saving driving?

Responses	Count	%
Strongly Disagree	106	4.20%
Disagree	289	11.50%
Neither agree nor disagree	736	29.40%
Agree	1046	41.70%
Strongly Agree	276	11.00%
Don't know	53	2.10%
Total Responses	2506	

No Responses 227

47. Would you be interested in joining an incentive scheme to encourage eco-driving?

Responses	Count	%
Yes	926	37.00%
No	690	27.50%
Don't know	890	35.50%
Total Responses	2506	
No Responses	227	

48. Vol scheme benefits

Responses	Count	%
Significant actual fuel savings	1519	83.70%
Information	555	30.60%
Social support	119	6.60%
Prizes	392	21.60%
Recognition (eg car stickers)	232	12.80%
Discounts	1427	78.60%
Airpoints	429	23.60%
Rewards points	749	41.30%
Competitions	222	12.20%
Other	31	1.70%
Total Responses	1815	
No Responses	918	

49. home efficiency

Responses	Count	%
A lot	1225	49.00%
A little	1128	45.10%
None, I/we have other priorities	101	4.00%
Don't know	48	1.90%
Total Responses	2502	
No Responses	231	

50. Do you support or subscribe to any of these environmental organisations?

Responses	Count	%
No	1828	73.10%
The Green Party	151	6.00%
Greenpeace	232	9.30%
Friends of the Earth	70	2.80%
Cyclists Advocate Network	82	3.30%
Environmental Defence Society	30	1.20%
Forest and Bird	263	10.50%
Don't want to say	115	4.60%
Other	82	3.30%
Total Responses	2502	

No Responses 231

51. Where work

Responses	Count	%
From home or home office (excluding a farm)	388	15.60%
On a farm, park, ski-field, forest, or other out-doors place	104	4.20%
Inside the same workplace most of the day	1542	61.90%
On the same building or construction site most of the day	126	5.10%
Making visits from an office or hospital most of the day	111	4.50%
Driving from work site to site as a mobile service provider	154	6.20%
As a taxi, ambulance or delivery driver	28	1.10%
At sea or as part of an aircrew	19	0.80%
Other	160	6.40%
Total Responses	2492	
No Responses	241	

52. What sort of formal educational qualifications do you hold?

Responses	Count	%
None	37	1.50%
Secondary school	629	25.20%
Trade - tertiary	343	13.80%
Academic - tertiary	1427	57.30%
Don't want to say	56	2.20%
Total Responses	2492	
No Responses	241	

53. Where do you live?

Responses	Count	%
Auckland	627	25.20%
Wellington	377	15.10%
Christchurch	321	12.90%
Hamilton, Tauranga or Dunedin	309	12.40%
Another city or town	592	23.80%
A rural area	266	10.70%
Total Responses	2492	
No Responses	241	

54. How old are you?

Responses	Count	%
Up to 24	129	5.20%
25-34	338	13.60%
35-44	521	20.90%
45-54	717	28.80%
55-64	709	28.50%

65 or older	69	2.80%
don't want to say	9	0.40%
Total Responses	2492	
No Responses	241	

55. Which gender are you?

Responses	Count	%
Female	1338	53.70%
Male	1154	46.30%
Total Responses	2492	
No Responses	241	

56. How do you feel about your day-to-day finances at the moment?

Responses	Count	%
Happy	184	7.40%
Comfortable	777	31.20%
Cautious	1156	46.40%
Worried	338	13.60%
Don't want to say	37	1.50%
Total Responses	2492	
No Responses	241	