



AA Member Surveys
Views on major transport issues

GUIDING
LIFE'S
JOURNEYS
FOR OVER
110 YEARS.

New Zealand
Automobile
Association



What our Members think



2017

1.5 million Members and growing

The AA has more than 1.5 million Members of which more than a million are Personal Members. Our surveys capture this group's views and give valuable insights into what New Zealanders think about transport issues.

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Foreword

The New Zealand Automobile Association conducts in-depth research into our Members' views on a broad range of transport issues.

Our Members are affected on a daily basis by all aspects of the transport system. This includes driver behaviour, road conditions, public transport and much more. AA Members often have strong views on how things could be better.

This book provides a snapshot of what our Members think on the transport issues they care most about. It is not a policy document but designed to give authorities insights and information. Because the AA Membership is so large, our surveys provide a strong indicator of New Zealand public opinion.

Our Membership includes 30% of the licenced drivers in New Zealand (more than 1 million Personal Members). We also have nearly 600,000 Members through business to business Roadservice programmes.

We undertake about 15 Member surveys via email every year about transport issues. They are sent to a random sample of AA Members and the rate of response allows us to be confident that results reflect the whole AA Membership to within 2-3%.

We take great care to ensure our surveys are statistically robust. The information in this document summarises just some of the findings from our surveys in recent years. We hope it is a useful resource for policy and decision makers.

Mike Noon
General Manager
AA Motoring Affairs



“What **our Members** think is critical to decisions about the **future of transport** in New Zealand.”

27

surveys conducted for the results in this book.

30%

of licenced drivers in New Zealand are AA Members.



1

Who AA Members are

Age, gender, location, vehicle ownership

With more than 1.5 million Members, the AA is New Zealand's biggest club.

Our Members come from every part of the country and right across New Zealand society – from teenagers learning to drive to Members who have been with the AA for more than 60 years.

Slightly more women than men are AA Members and we have hundreds of thousands of Members who, as well as being car drivers, also use public transport, bicycles and motorcycles.

AA Members tend to be slightly older and more well off than the general population but because we have such a large number and range of Members our surveys give a great picture of what New Zealanders think about transport issues.

17%
have children in their care

14%
describe themselves as a cyclist

11%
regularly use public transport

AA Members are voters

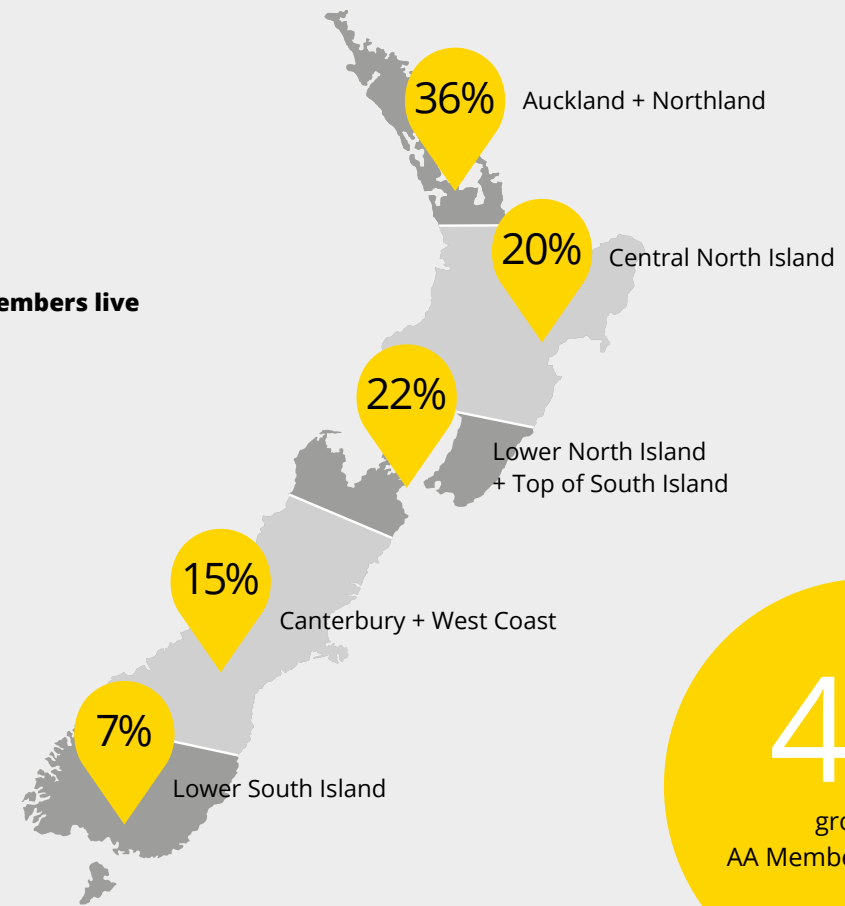
86%
said they would be voting in the last local body elections

54%
of AA Members are women

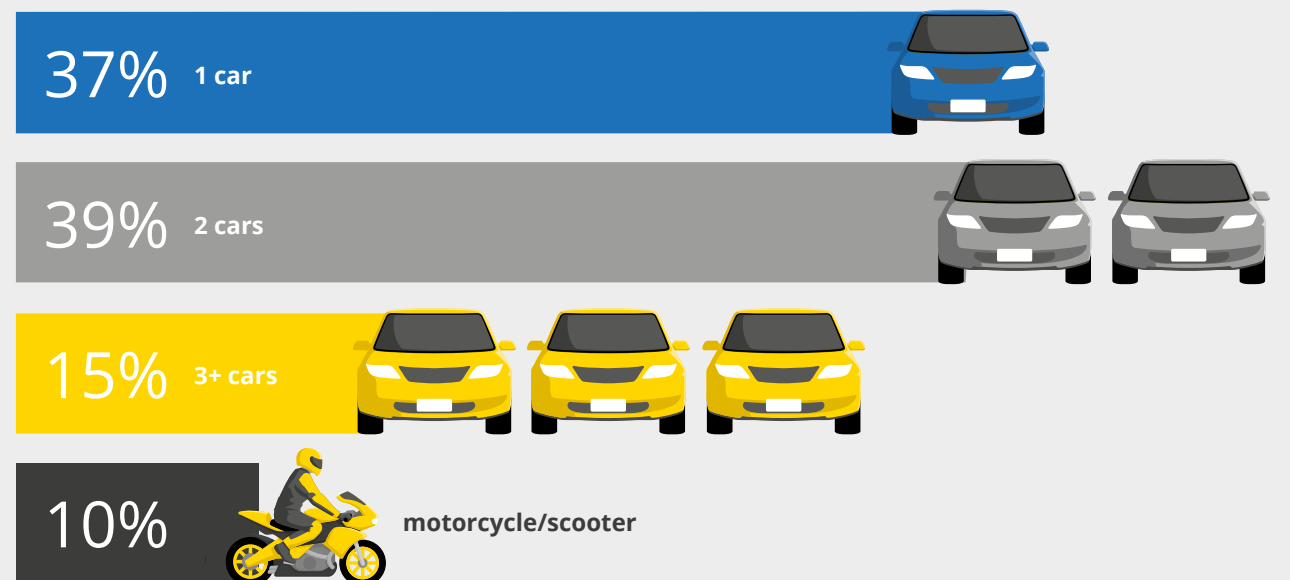
50%
of AA Members are younger than 55



Where our Members live



Vehicles per household



2

The value of the car

How Members use them and why

Using a car is the way most New Zealanders travel every day.

Official statistics show about 80% of the trips made across the country use a car and our surveys of AA Members make it clear why. Our Members choose a car because they can carry more and they find them quicker, more convenient and more reliable than other forms of transport.

Not being able to use a car would be a problem for nearly 90% of people and they also actually enjoy the act of driving. The majority of our Members (both men and women) like or love to drive.

Car use

66%

use a car to run errands a lot of the time

50%

use a car for work a lot of the time

48%

use a car to carry things a lot of the time

34%

use a car to carry other people a lot of the time

Female AA Members

68% like or love driving

7% dislike driving

If Members couldn't use a car

66%

would find it a major problem

21%

would find it a small problem

5%

would find it no problem

Male AA Members

78% like or love driving

3% dislike driving



Why AA Members use a car over other options

93% can carry more

80% quicker

78% more convenient

68% more reliable

27% cheaper

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Alternative modes

Public transport, cycling, walking, motorcycling

While the car is the preferred method of transport for AA Members they are regular users of public transport and support more investment in other modes.

When asked about replacing some car trips with other forms of transport many Members say they are doing it now. Walking is the most popular alternative to the car, with nearly a quarter using their feet instead of a car for some trips, followed by buses and cycling.

A reasonable segment of AA Members think it would be easy to replace some trips they currently use a car for with other modes but the majority view using other modes as hard or impossible for their transport needs. Buses were the mode that our Members regarded as being the easiest to replace some car trips, followed by walking and cycling.

There is little support among AA Members for the idea of making public transport free for its users but they do support it being subsidised to some level. The majority see benefits in investment in cycleways and public transport but do not want that to mean reduced spending on roads.

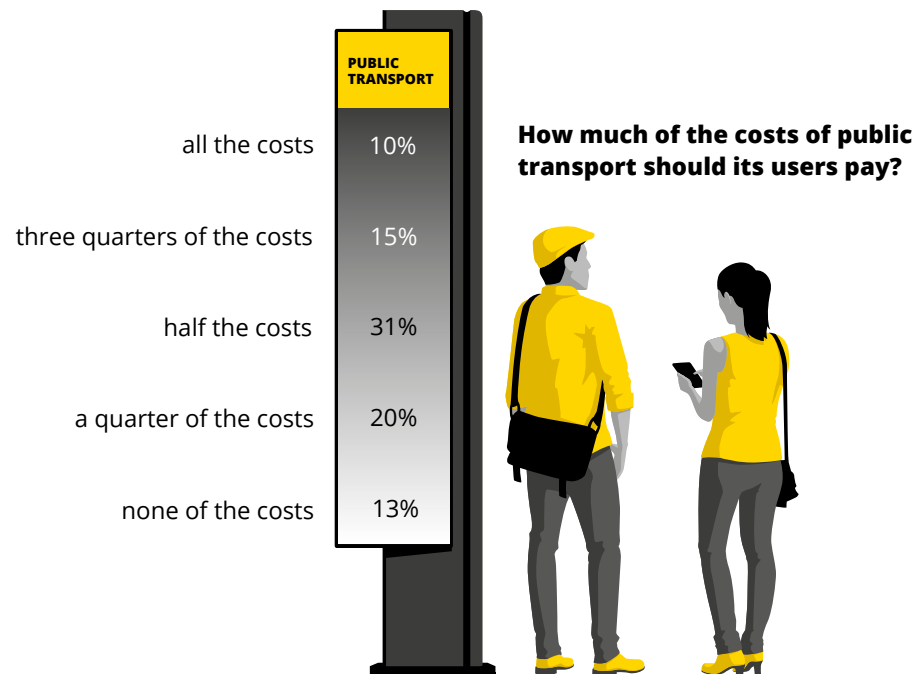
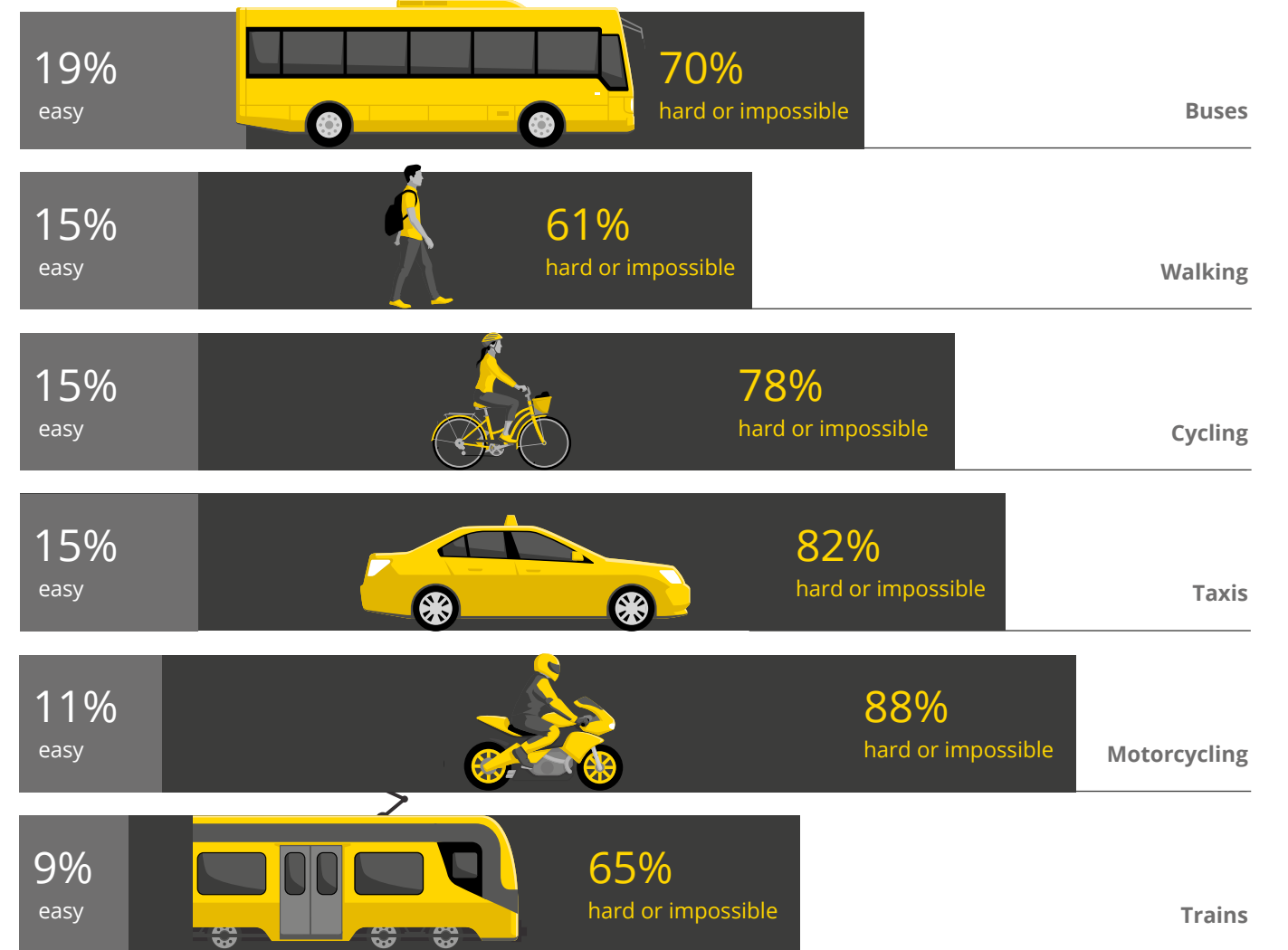
24% of AA Members are currently replacing some car trips with walking

84% support the development of more cycleways and biking facilities

60% oppose spending less on roads and more on public transport

\$23 per week is the average weekly spend on public transport by AA Members that regularly use it

Could AA Members replace some car trips with other modes?



Auckland
AA Members cycle less than in other cities.

Female
AA Members view cycling as "scary and unsafe" significantly more than men

93%
of AA Members are not put off riding a bike by having to wear a helmet



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Road safety

Crashes, vehicle safety, speed, enforcement

Road safety is the transport issue that worries AA Members the most. Yet the vast majority have driven their whole lives without ever being involved in a crash. Perhaps that is why they have little nervousness about a crash during their everyday travel and only slightly more when making longer trips.

Almost all AA Members recognise that modern vehicles are safer than older ones. They also say they would be willing to pay more for a safer vehicle but the majority don't know what safety rating their current vehicle has – especially female Members.

AA Members overwhelmingly support more use of red light cameras and for the Police to be able to test a driver for drugs but things aren't so black and white around speed enforcement. While they aim to drive at or below the speed limit, most expect that they will occasionally go over it. The majority of our Members support the current level of speed enforcement but there is opposition to blanket lowering of limits, tougher penalties for low-level speeding or a permanently reduced tolerance.

How nervous do AA Members feel during everyday travel?

60% little or no concern about a crash

20% moderately nervous or more

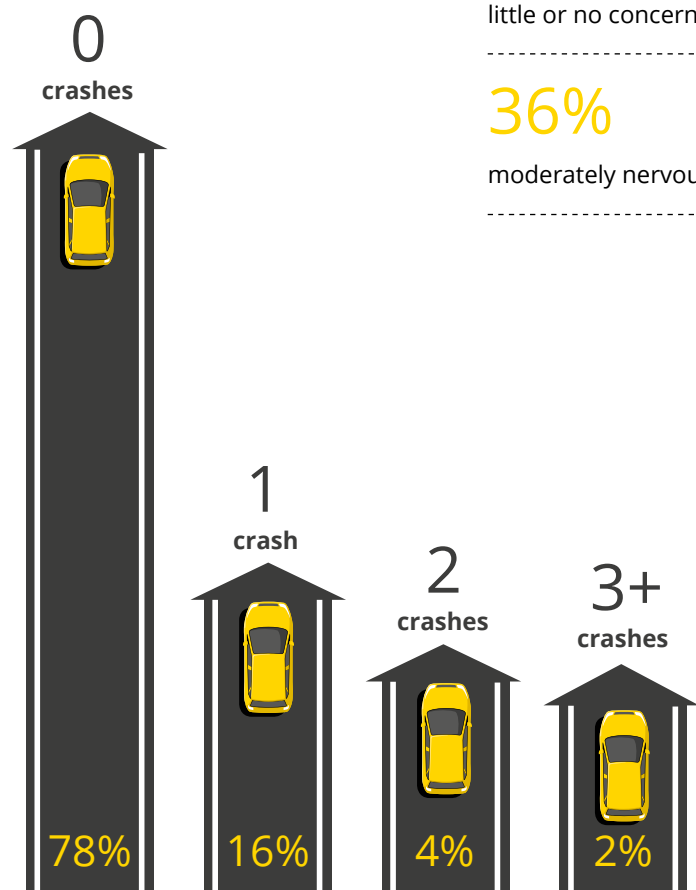
How nervous do AA Members feel on a long trip?

38% little or no concern about a crash

36% moderately nervous or more



How many crashes where someone was injured or killed have AA Members been involved in?



Safer vehicles

88% of AA Members see new cars as safer than a similar vehicle from 10 years ago.

Given a choice between a 2-star or 4-star safety-rated vehicle:



How many AA Members say they know the safety rating of their vehicle?

18% of women

42% of men



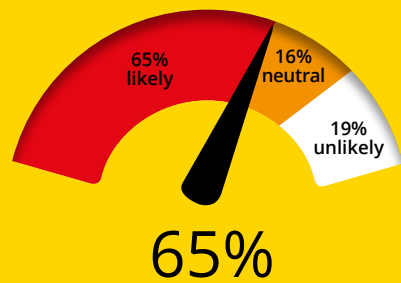
Speed

Average speed AA Members aim to drive in a 100km/h area:

98 km/h

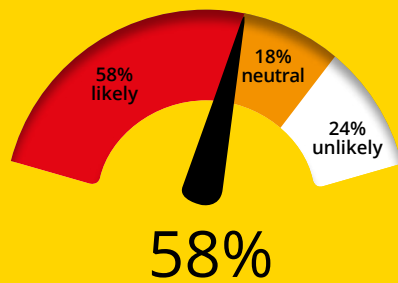


Exceeding speed limit in an urban area



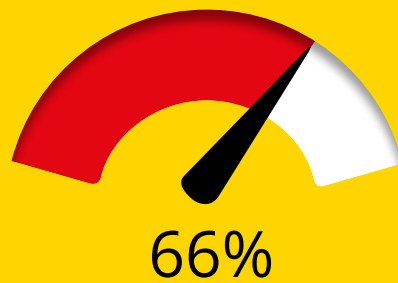
say they are likely to exceed the speed limit at some point

Exceeding speed limit on the open road



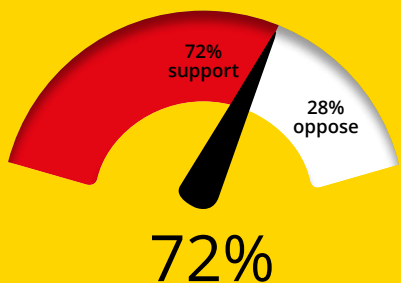
say they are likely to exceed the speed limit at some point

Unsure of speed limit



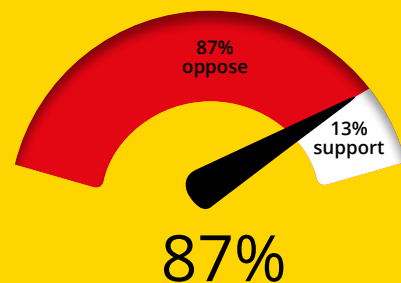
have recently been on a stretch of road and unsure what its speed limit was

110km/h limit on high quality motorways



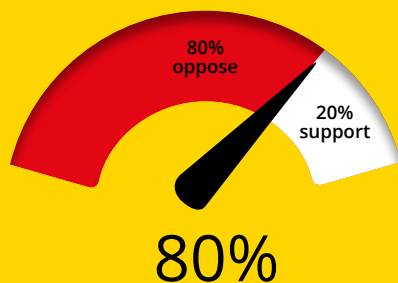
support high quality motorways having 110km/h speed limits

Reduce limit from 100km/h to 90km/h on the open road



oppose the idea of reducing the open road speed limit to 90km/h

Reduce limit from 50km/h to 40km/h in an urban area



oppose the idea of reducing the urban speed limit to 40km/h

Enforcement

Red light cameras

89%

of AA Members support or strongly support more red light cameras

Impaired driving

92%

of AA Members believe people with alcohol problems should have an alcohol interlock in their vehicle

84%

of AA Members support introducing roadside saliva-based drug testing

7%

have driven when they probably shouldn't have

Speeding tickets

12%

of AA Members have had a speeding ticket within the last 12 months

Running a red light is seen as the most dangerous action on the road.

AA Members' perceptions are different to the reality of the road toll

In 2006 the road toll was 393
In 2016 it was 328

Yet 51% of AA Members think there are more road deaths now than 10 years ago. 26% think there are less.



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Congestion

How bad is it and how are people responding to it

Congestion is one of the greatest frustrations our Members have around driving, particularly in the bigger cities. Two thirds of AA Members are frustrated or extremely frustrated and if there aren't improvements in the next five years they say they will be even more annoyed.

Unsurprisingly, Auckland AA Members experience the worst congestion and are the most frustrated of anywhere in the country. But in all three of New Zealand's major cities our Members feel that congestion is getting worse and a significant number have considered moving house or work to try and reduce the amount of time they spend stuck in traffic.

The groups that suffer the worst regular delays due to congestion were Members who have children in their care and those under 45. Nearly half of these groups say they experience delays most days.

The majority of our Members that drive to work in Auckland, Wellington and Christchurch see little ability to change modes.

Many are already taking action to avoid congestion now with the most popular options being changing the time or route they drive.

Auckland AA Members have shown openness to the idea of congestion charging but only if it delivers travel time improvements and direct benefits to drivers.

80%

of AA Members from Auckland, Wellington and Christchurch consider that traffic congestion has worsened over the last five years

72%

of AA Members will be frustrated or extremely frustrated if congestion is the same in five years' time



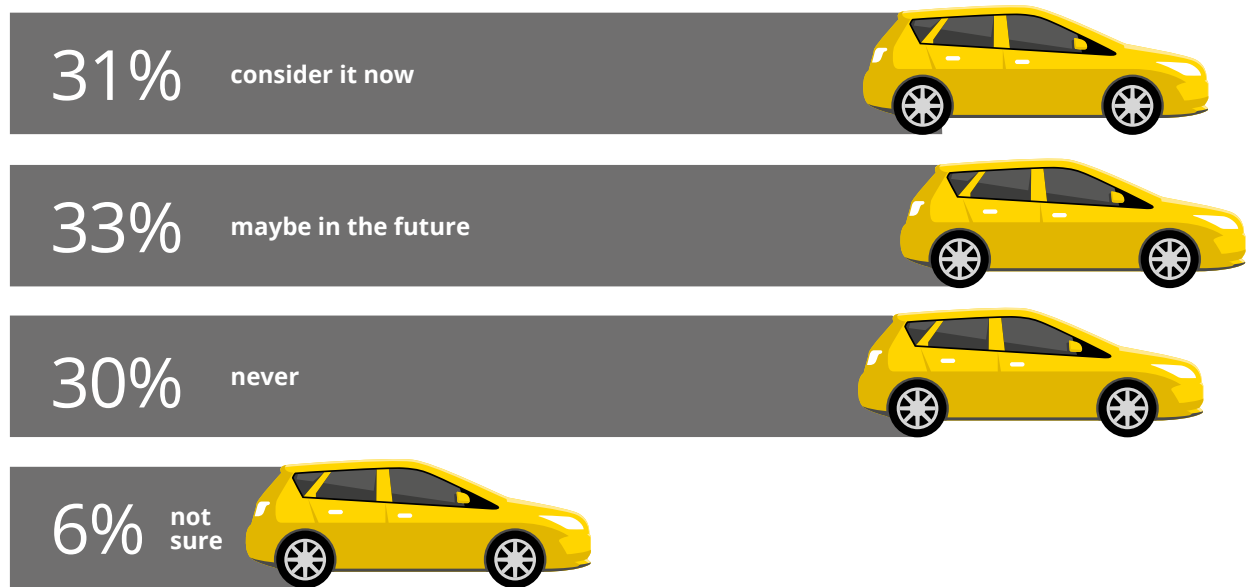
90%

feel they have no option

AA Members from Auckland, Wellington and Christchurch who drive to work say they have no other choice. They either need their vehicle during the day or before or after work, or have no other feasible transport options available.



Do Auckland AA Members think the Government should consider charging tolls on congested roads to encourage people to avoid them at busy times?



How often do you experience delays of 5+ minutes due to congestion?

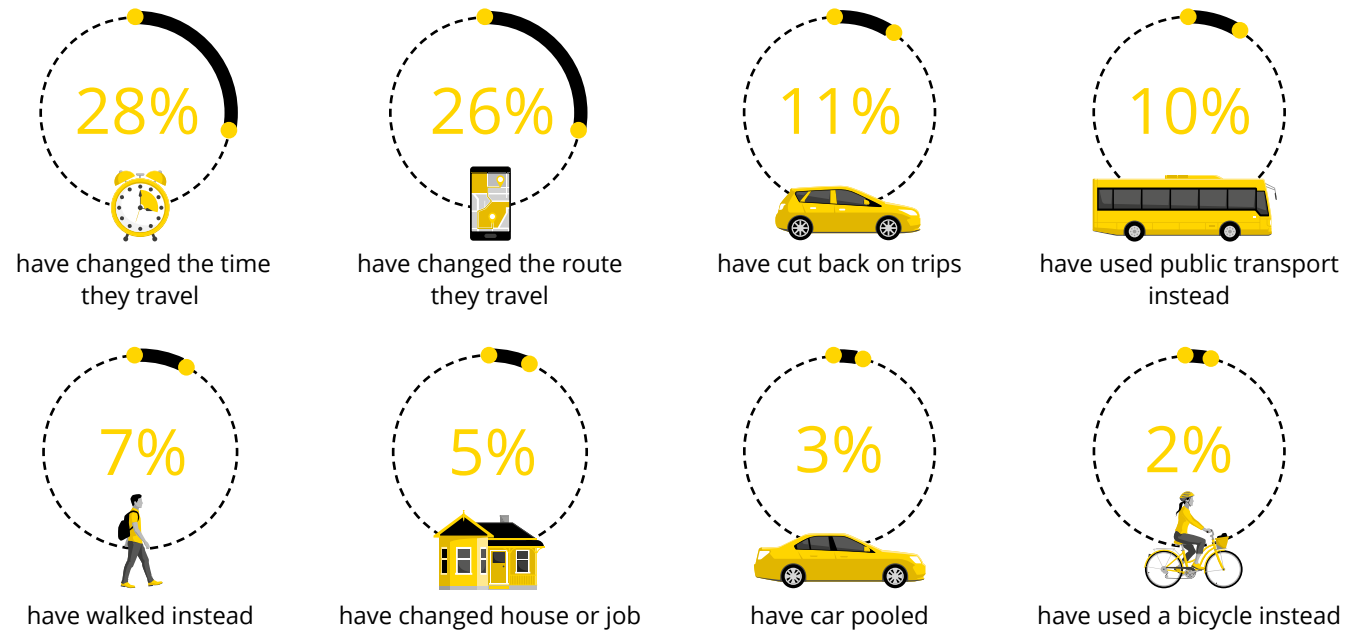


34% most or every day

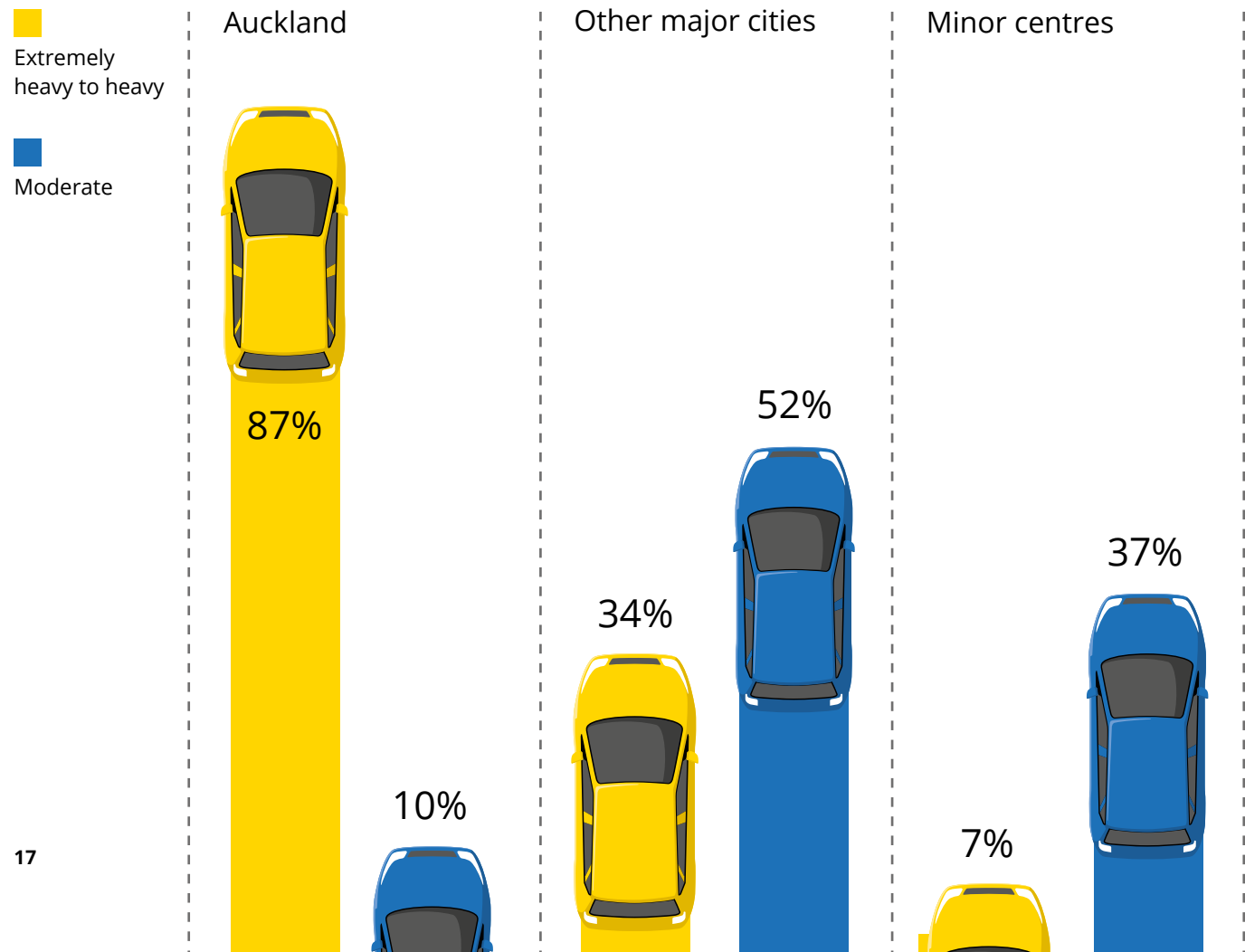
AA Members with children at home and those under 45 suffer the most time lost in congestion.



How AA Members are avoiding congestion now



How would you rate the congestion where you live?



50%
of AA Members from Auckland who drive to work have considered moving house or job to avoid congestion.

50%
of AA Members who drive to work in Auckland, Wellington or Christchurch are checking traffic information and potentially adjusting their trip.

30%
of AA Members from Wellington and Christchurch who drive to work have considered moving house or job to avoid congestion.

6

Costs of transport

Tolls and parking enforcement

The vast majority of AA Members feel either cautious or comfortable about their personal finances.

Among transport-related costs they are most concerned about fuel but most of our Members aren't expecting any big increases in their transport costs in the short term.

Most AA Members are against tolls being added to existing roads but they are open to tolls on new roads provided there remains a free alternative route.

More AA Members have been stung with a parking ticket than a speeding ticket in the last year. They regard warnings or fines as the most appropriate penalties for parking violations and see clamping and towing as excessively harsh.

Our Auckland Members, regardless of where they live in the city, oppose moves to make it harder or more expensive to park as a way of trying to push people towards using public transport. Auckland AA Members will also spend 5-10 minutes searching for a free car park rather than paying.

How do AA Members feel about their own financial situation?

46% feel cautious

42% comfortable

6% worried

2% speculative

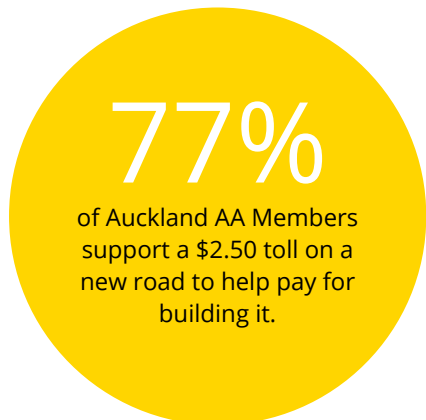
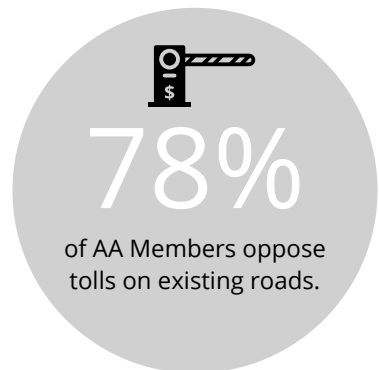
What do AA Members expect to happen to their transport costs in the near future?

53% increase a little

26% no change

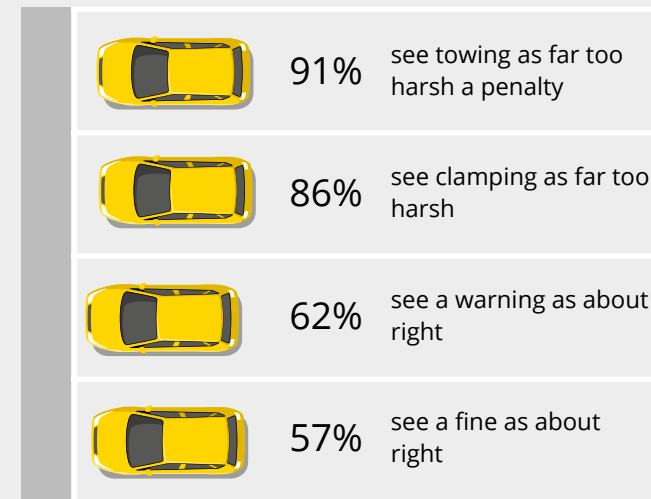
13% increase a lot

4% reduce

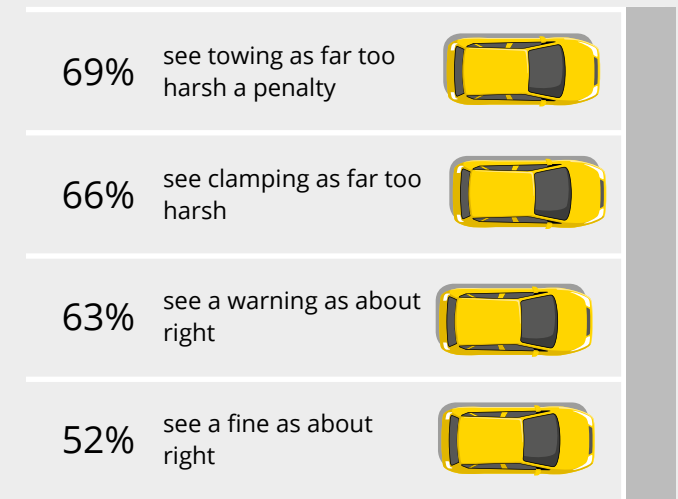


Views on parking enforcement

If someone has overstayed 20 minutes in a car park:



If someone is using a private car park they are not allowed to use:



7

Fuel

Price variation, competition and regulation

Fuel prices are something that most AA Members have some level of concern about.

Fuel prices are the transport issue that generates the most questions and complaints from our Members and also the most media coverage. People care about how much they are paying at the pump and keep a watchful eye on prices.

Something that we are often asked is why petrol is cheaper in Australia than New Zealand and most of our Members do not know that tax is a key reason for this. While about \$1 per litre of the pump price for petrol here is tax it is half that in Australia.

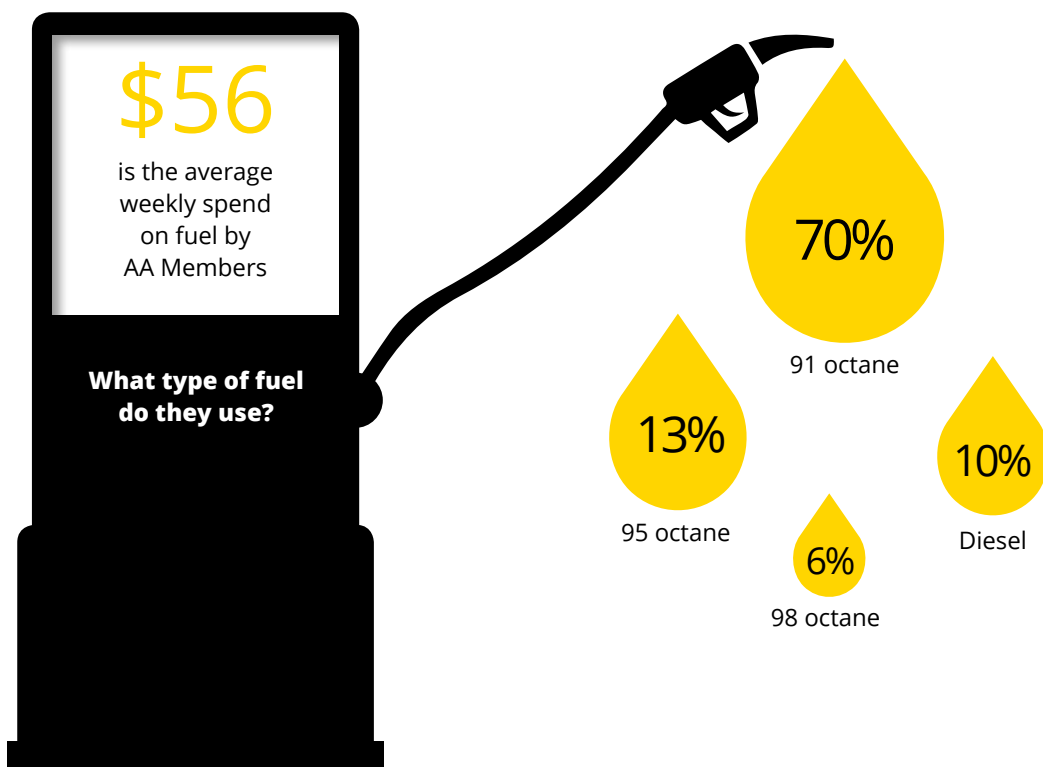
The fact that the price of fuel can be different in different parts of New Zealand can also be confusing to many Members but they are evenly split on whether they would prefer the price to be the same across the country.

One thing 81% of AA Members do agree on is that service stations should display the price of higher octane petrol on their price boards.

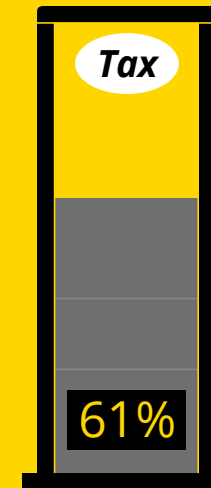
50%
would like fuel prices the same across the country

44%
think there should be local variation

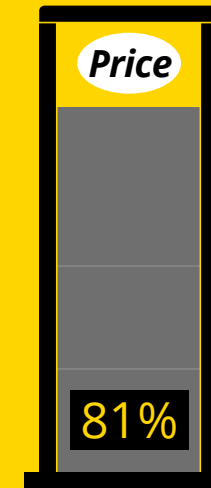
42%
think fuel companies don't pass on changes in oil prices fairly



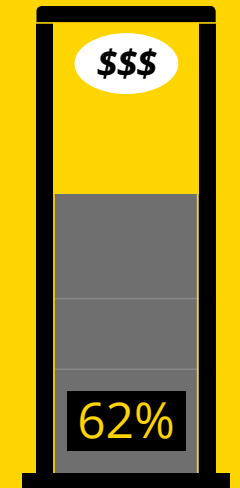
Fuel pricing



of AA Members are unaware that tax makes up nearly \$1 of the pump price for a litre of petrol

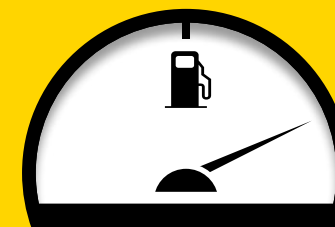


believe service stations should display prices for 95/98 octane on their price boards

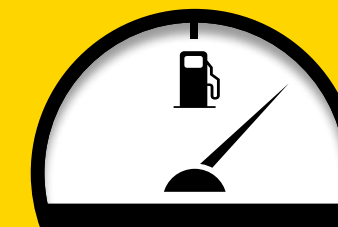


think fuel prices are a bit expensive to very expensive

What should the AA do to represent our Members regarding fuel prices?



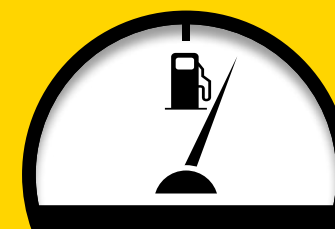
keep tabs on fuel prices and margins



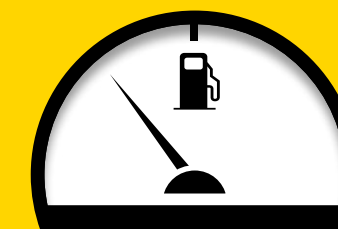
comment in media when prices are too high



publish fuel prices from around the country



campaign against GST on excise tax



lobby for more Government control

8

Environment

Environmental concerns and personal transport choices, electric vehicles

While almost all AA Members are conscious of being environmentally responsible it is not a decisive factor for how most choose to travel around. More AA Members have been motivated to change their travel in the last two years due to congestion than environmental concerns.

Among those that have gone for greener transport choices, using a car still remained popular. Trying to drive more fuel efficiently or opting for more fuel-efficient vehicles were two of the most popular options along with cutting back on trips or walking instead of driving.

Encouraging the use of electric vehicles was seen as a positive environmental move by the majority of Members and generally the more they know about electric vehicles the more positive they feel about them. AA Members indicated they would be open to paying slightly more for electric vehicles but their price tag remains a hurdle. About half of our Members see them as unaffordable and the lack of range and charging facilities are their two other biggest concerns.

88% of AA Members are conscious of being environmentally responsible

69% have made no changes to their travel in recent years for environmental reasons

37%
unlikely

32%
neutral

27%
likely

How likely AA Members say they are to make transport changes for environmental reasons?



The top five changes AA Members think would make a difference to the environment:

1. Improving public transport
2. More freight on rail/ships
3. Encouraging electric vehicles
4. Encouraging more working from home
5. Encouraging more cycling

Of the 31% of AA Members that have made changes for environmental reasons:

- 17% - had cut back on trips
- 14% - drove more fuel efficiently
- 11% - had replaced some car trips with walking
- 10% - had bought a more fuel-efficient car
- 9% - had replaced some car trips with public transport
- 5% - had replaced some car trips with cycling



Would AA Members pay more for an electric vehicle?

- 2% - a lot more
- 27% - a moderate amount more
- 34% - a little more
- 32% - no more



50% of AA Members see electric vehicles as unaffordable.

The top five concerns AA Members have about electric vehicles:

1. Lack of range
2. Lack of charging facilities
3. Cost of vehicle
4. Battery life
5. Time to charge



Electric vehicles

Lower fuel costs were seen as the greatest benefit from an electric vehicle.

61% of AA Members saw an environmental benefit in encouraging electric vehicles.

As barriers reduce electric vehicles have potential to suit about **30%** of AA Members.



9

Technology

Smartphone use, autonomous vehicles and intelligent transport systems

Technology is opening up huge opportunities to alter the way people travel.

AA Members are open to a variety of hands-free ways that smartphones could provide information to drivers like what the speed limit is, alerts about roadworks, safety notifications, where an empty car park is, or the best route to avoid congestion.

About a third of AA Members would also prefer to use a smartphone app to pay for car parking.

Our Members have a lot of caution around the idea of autonomous vehicles that drive themselves. Only a small minority of Members would currently use an autonomous car, with most saying they would choose a vehicle they can drive themselves.

They are open to the idea of autonomous vehicles being trialed in New Zealand, depending on the circumstances around it, and were much more comfortable with the prospect of autonomous buses that ran on set routes and were limited to low speeds.

The idea of transport authorities using technology to scan passing vehicles and licence information was supported by the majority but our Members were strongly opposed to private organisations or individuals being able to do so.



The majority of AA Members were open to the idea of **autonomous vehicles** being tested on NZ roads depending on the conditions around the trials.

12%

of AA Members would opt for the autonomous car, given a choice between a fully autonomous car or a vehicle you drive yourself

70%

of AA Members would be happy for the NZ Transport Agency and Police to be able to electronically scan the licence plate and registration information of passing vehicles. They were opposed to private organisations being able to do the same

66%

of AA Members would be relaxed about an autonomous bus service that was limited to 30km/h and only travelled a set route

55%

of AA Members supported Police being able to electronically scan people's licence as they drove past

Lack of control

if something goes wrong is AA Members' leading concern around using an autonomous vehicle.





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The information in this document summarises results from 27 surveys of AA Members in recent years.

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