

MOTORING AND MOBILITY REPORT

How Australians experience their transport options

AUSTRALIAN AUTOMOBILE ASSOCIATION
ELECTION 2016



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ABOUT THE AUSTRALIAN AUTOMOBILE ASSOCIATION



The Australian Automobile Association (AAA) is the peak organisation representing Australia's motoring clubs and their almost eight million members.

The AAA is an apolitical organisation which advances the interests of its constituent motoring clubs as well as all road users across Australia to ensure transport is safe, sustainable, and affordable, and that Australia's transport infrastructure delivers for the community and the economy.

ABOUT THE RESEARCH



The research contained in this publication was conducted throughout 2015–16.

It comprised a number of representative focus groups and online polling of 3,700 Australians.

REFERENCES

- 1 http://infrastructureaustralia.gov.au/news-media/media-releases/2015/2015_05_22.aspx
- 2 http://roadsafety.gov.au/nrss/files/NRSS_2011_2020.pdf
- 3 <http://www.abs.gov.au/ausstats/abs@.nsf/mf/9309.0>

CONGESTION AND COST— THE AUSTRALIAN EXPERIENCE OF MOTORING AND TRANSPORT



Michael Bradley

Chief Executive
Australian Automobile Association

Australians rely on transport systems, most notably their cars, for just about every aspect of daily life, from getting to work, running their business, taking their children to school, to shopping and recreational activities.

The research we present in this report makes clear that Australians have serious concerns relating to transport safety, congestion and affordability.

But whilst many have a clear picture of how inadequate transport systems negatively impact their lives today, it's important that Australians also understand that inefficient transport systems will cost them money and opportunities into the future and that to remedy this investment must be made now.

Our research shows that congestion is seen by Australians as having worsened over the past year, with many expecting it to worsen further in the coming year. However, many may not realise that government figures show that congestion already costs our economy about \$16 billion per year and that this will rise to \$53 billion¹ by 2031.

Our research tells us Australians are deeply concerned about road safety but it's not clear how many realise that on top of the social and human costs of having around 30,000 killed and injured each year on our roads, that the estimated economic cost of road trauma is about \$27 billion per year².

Australians are also concerned at the cost of motoring, yet around a third are unaware they will pay more than \$18 billion in federal road-related taxes this year.

While Australians may not have full view of the costs of having to rely on the transport systems of the past, it's clear they know something is wrong; that they are not getting a fair return on their taxes. And it's becoming clear they are considering taking action at the ballot box.

Our research indicates that of those surveyed, 41 per cent would be more likely to vote for a party that invested more from fuel excise in transport infrastructure and services, with 14 per cent of those being much more likely to vote for such a party.

The AAA hopes that policy makers and everyday Australians find this publication a useful insight into the challenges Australians face today so that we can develop the transport systems to support the economy and communities of tomorrow and to keep Australia moving.

A SNAPSHOT OF THE AUSTRALIAN TRANSPORT USER

In considering the transport experience of Australians it is important to remember there is no single type of 'motorist' or 'road user'.

In fact, our polling shows that just 3 per cent of those surveyed exclusively use their cars for transport.

In between there are those who use their vehicle daily to get to or perform their work, those who use it only for shopping or to drop children at school, and indeed a mix of all of these activities. These Australians make up about 47 per cent of those surveyed.

'Medium users' represent 36 per cent of those surveyed, with 25 per cent of these reporting their primary vehicle use is recreational.

Within the 'light user' group 8 per cent report they are most often passengers.

Within these groups, participants reported the full range of public transport and active transport usage, from regular to infrequent.

While each has a different reliance on the land transport system, because transport systems are the lifeblood of the Australian economy, each is reliant on their efficient and affordable operation.



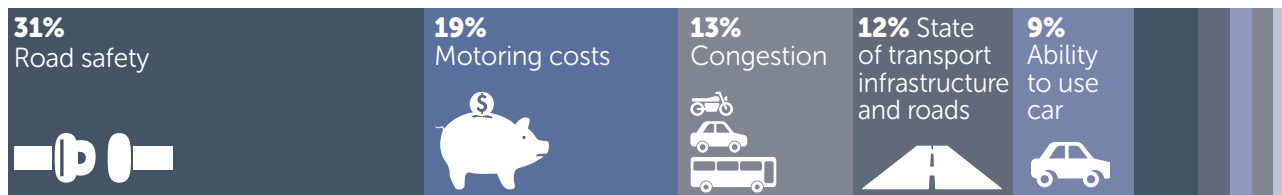
MOTORISTS' PRIMARY CONCERNS

Motorists remain highly concerned about road safety with 94 per cent of Australians surveyed rating it as an important concern and 31 per cent selecting it as their top concern.

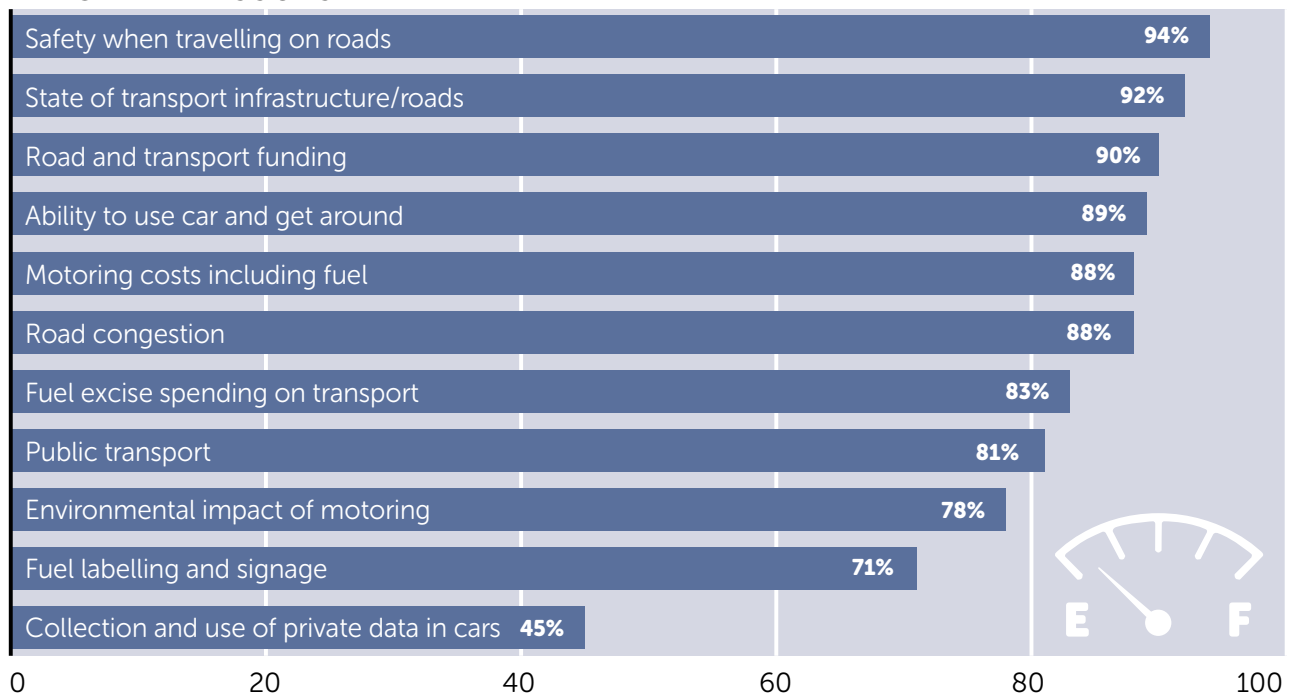
After safety the top three priorities for motorists are:

- The **cost of cars and motoring including fuel** is nominated as an important concern by 88 per cent of Australians surveyed and is the top concern for 19 per cent.
- **Road congestion** is nominated as an important concern by 88 per cent of Australians surveyed and is the top concern for 13 per cent.
- **The state of transport infrastructure and road conditions** is nominated as an important concern by 92 per cent of Australians surveyed and is the top concern for 12 per cent.

TOP CONCERNS



IMPORTANT ISSUES



A SNAPSHOT OF THE AUSTRALIAN TRANSPORT USER

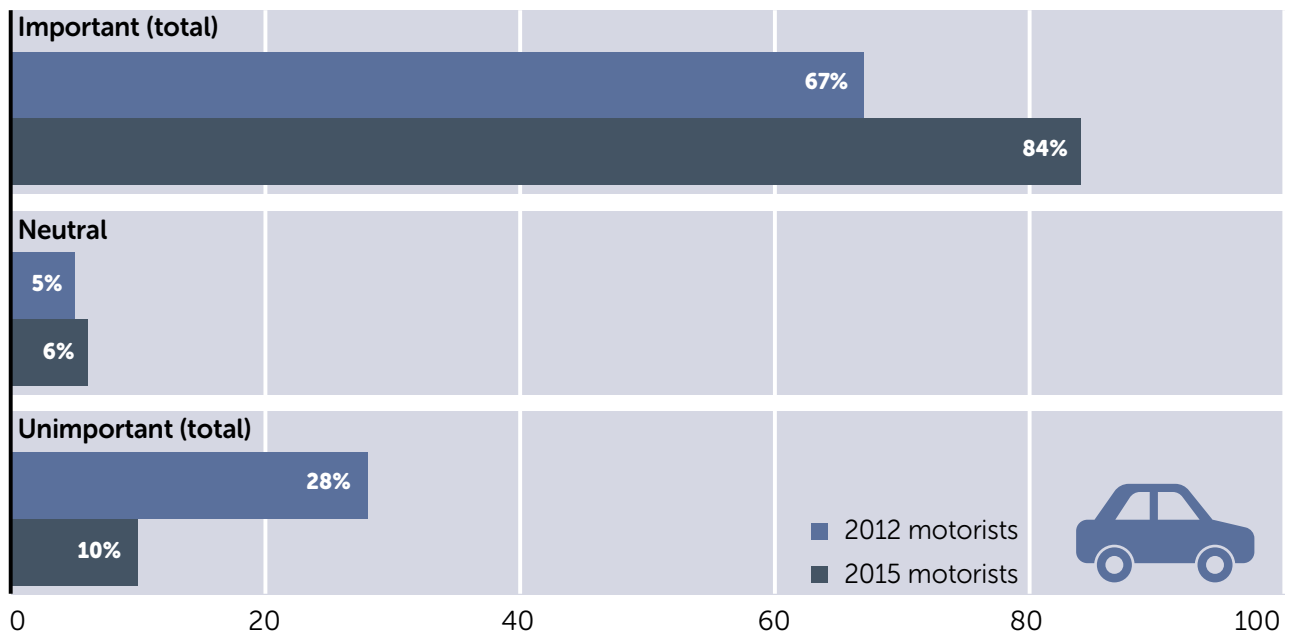
THE IMPORTANCE OF THE CAR

The car remains and is increasingly the principle form of transport for most Australians.

In 2015, 84 per cent of surveyed motorists reported their car was important to them compared with 67 per cent in 2012. Additionally, those who reported their car was 'very important' to them jumped from 18 to 30 per cent over the period.

Those reporting the car is 'extremely important' receded by 1 per cent (to 38 per cent in 2015).

THE IMPORTANCE OF CARS



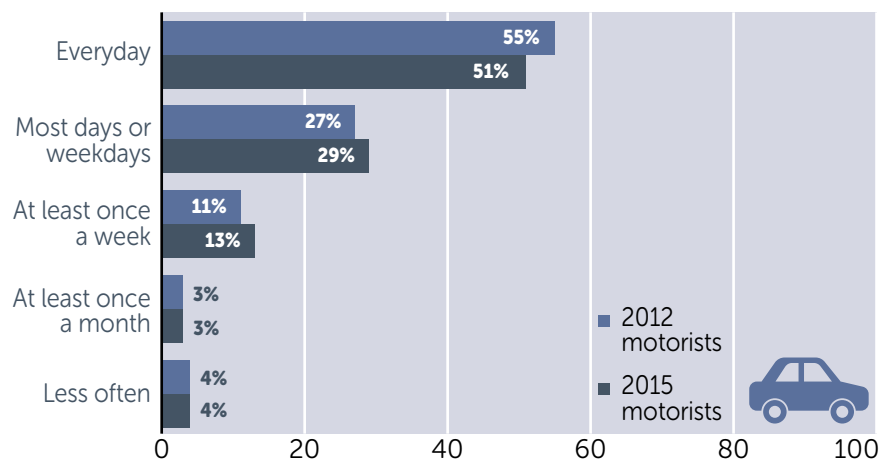
THE IMPORTANCE OF THE CAR

Car usage

In 2015, 51 per cent of motorists reported using a car daily.

This is a reduction from 55 per cent in 2012 and consistent with a downward trend beginning in 2003. Those who report using their cars most days of the week has risen from 27 per cent to 29 per cent over the period.

CAR USAGE FREQUENCY

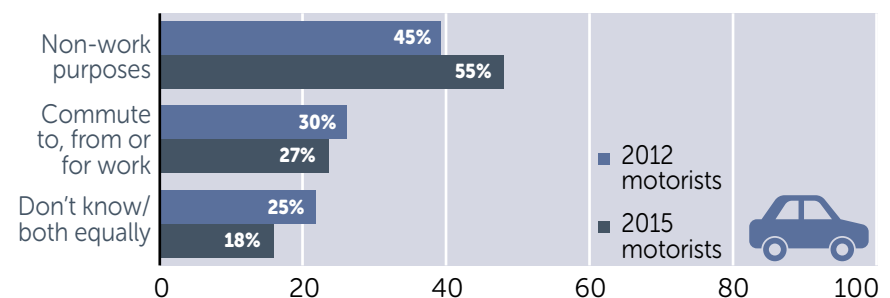


Motorists are increasingly using their cars for non-work purposes such as shopping, school drop off and leisure (up from 45 to 55 per cent). Car usage for commuting has fallen slightly from 30 to 27 per cent.

Far from congestion being an issue only for breadwinners as they travel to and from work, congestion is increasingly an issue impacting the daily activities of entire families.



CAR USAGE TYPE



A SNAPSHOT OF THE AUSTRALIAN TRANSPORT USER

PUBLIC TRANSPORT USAGE

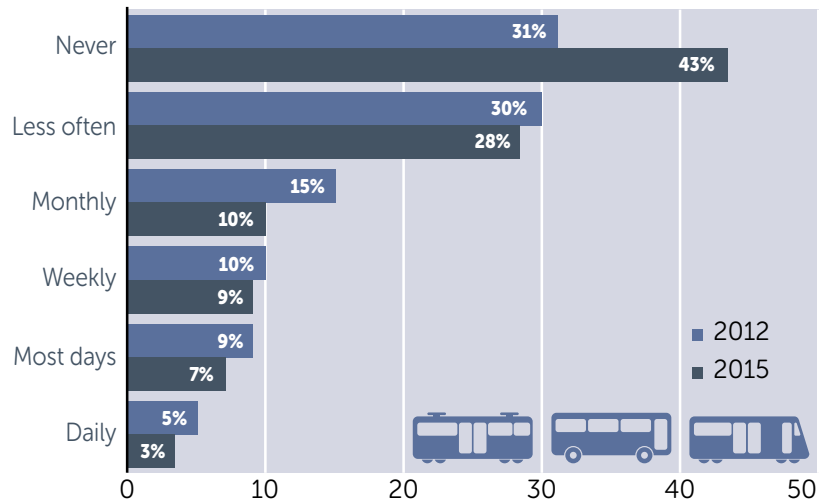
Between 2012 and 2015 there has been a moderate fall in the reported regular use of public transport (daily, weekly, monthly) but a significant increase (12 percentage points) in the proportion of people who report not using public transport at all.



As the car becomes increasingly important, and perhaps linked to dissatisfaction with the affordability, availability and flexibility of public transport, public transport usage has fallen.



PUBLIC TRANSPORT USE



THE CARS AUSTRALIANS DRIVE AND BUY

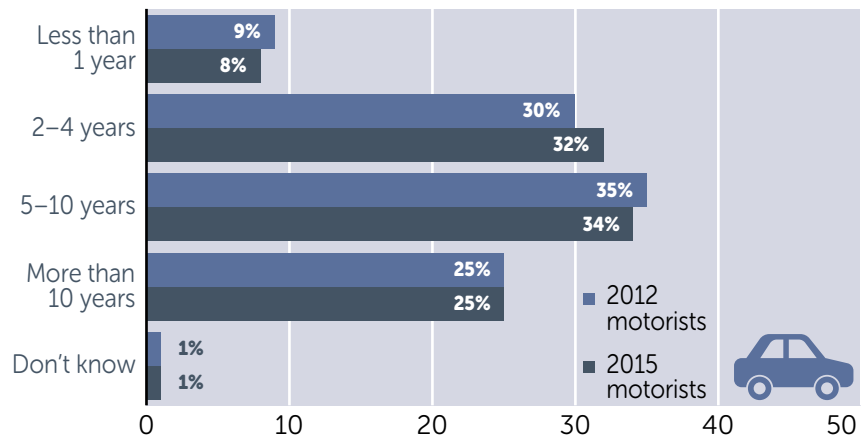
One-quarter of those polled reported that their car was more than 10 years old with two-thirds (59 per cent) reporting their vehicle as 5 or more years old.

This generally aligns with ABS data showing that the average age of the Australian vehicle fleet is 10.1 years.³ This is quite old by global standards and has implications for safety, running and maintenance costs, and environmental performance.

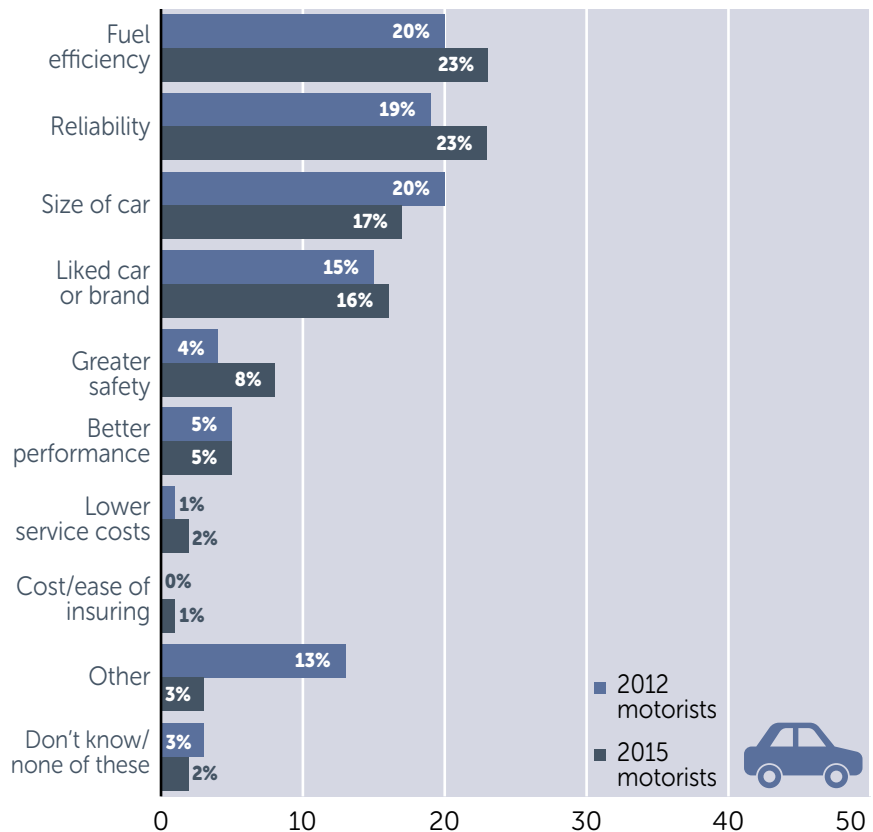
Fuel efficiency and reliability are the key reasons why Australians buy cars (both at 23 per cent). In 2012 efficiency scored 20 per cent and reliability scored 19 per cent. This is likely reflective of increasing costs of living pressures and the need to keep car running costs (fuel and repairs) lower.

Despite the overall concern of motorists for safety, it is less of a factor when choosing a car, with 8 per cent reporting this as their main reason for purchasing a car in 2015 (up from 4 per cent in 2012).

CARS AUSTRALIANS BUY AGE OF VEHICLE



CARS AUSTRALIANS BUY REASON FOR CHOICE



MOTORISTS' CONCERNS IN DETAIL

SAFETY

Motorists remain highly concerned about road safety with 94 per cent of Australians surveyed rating it as an important concern and 31 per cent selecting it as their top concern.

Congestion and Safety worsening

Fifty per cent of those surveyed said safety had worsened over the past year with 40 per cent expecting it will worsen further in the coming year. Only 8 per cent reported an improvement last year with 15 per cent expecting an improvement in the coming year.

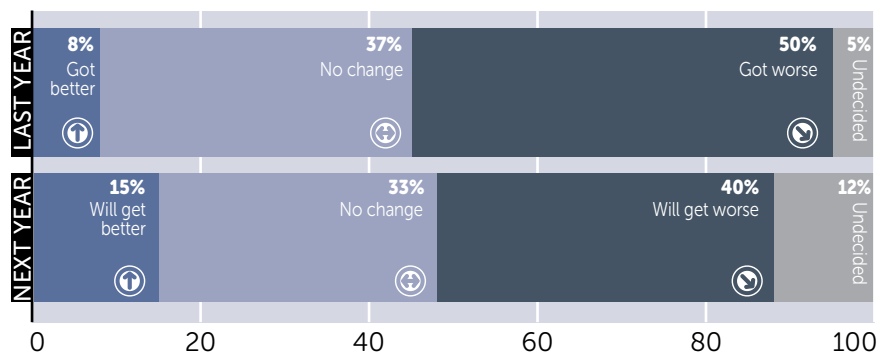
Seventy-seven per cent of those surveyed said congestion had worsened over the past year with 67 per cent expecting it will worsen further in the coming year. Only 2 per cent reported an improvement over the past year, with just 5 per cent expecting an improvement in the coming year.



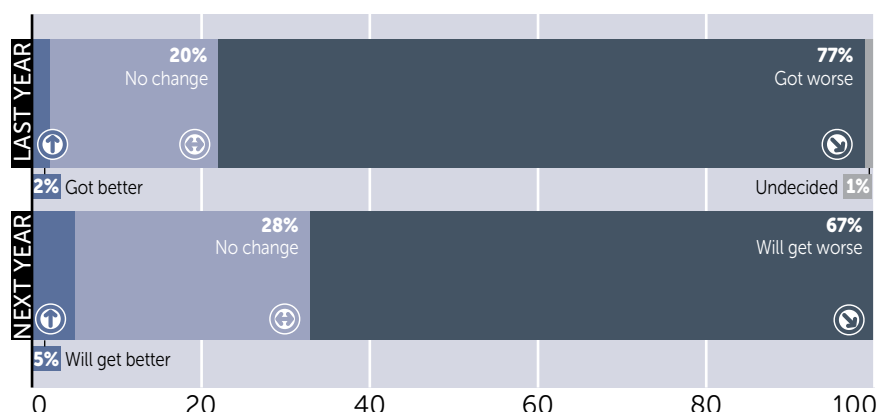
From our focus groups and noting the similar trend in observations and expectation of improvement, this heightened concern for safety appears to be a by-product of people experiencing congested roads as less safe.



ROAD SAFETY EXPERIENCES AND EXPECTATIONS



CONGESTION EXPERIENCES AND EXPECTATIONS



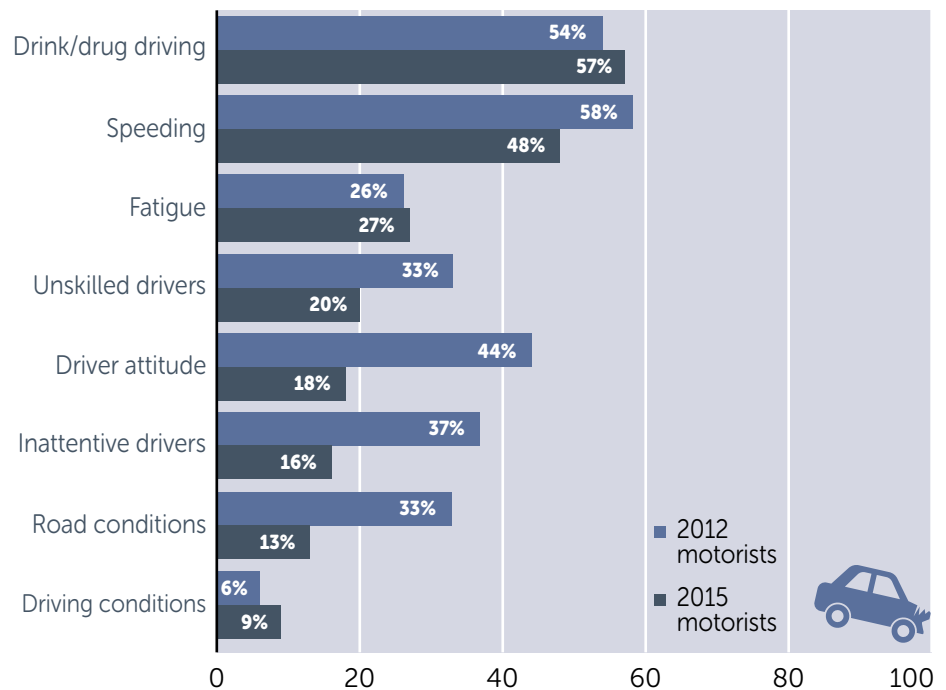
SAFETY

Main causes of road crashes

Australian motorists see the main causes of road crashes as:

- drink/drug driving 57 per cent, up from 54 per cent in 2012
- speeding 48 per cent, down from 58 per cent
- fatigue 27 per cent, up from 26 per cent
- a lack of skills 20 per cent, down from 33 per cent.

ROAD CRASHES MAIN CAUSES*



* More than one response allowed

MOTORISTS' CONCERNS IN DETAIL

SAFETY

Action Australians want taken on safety

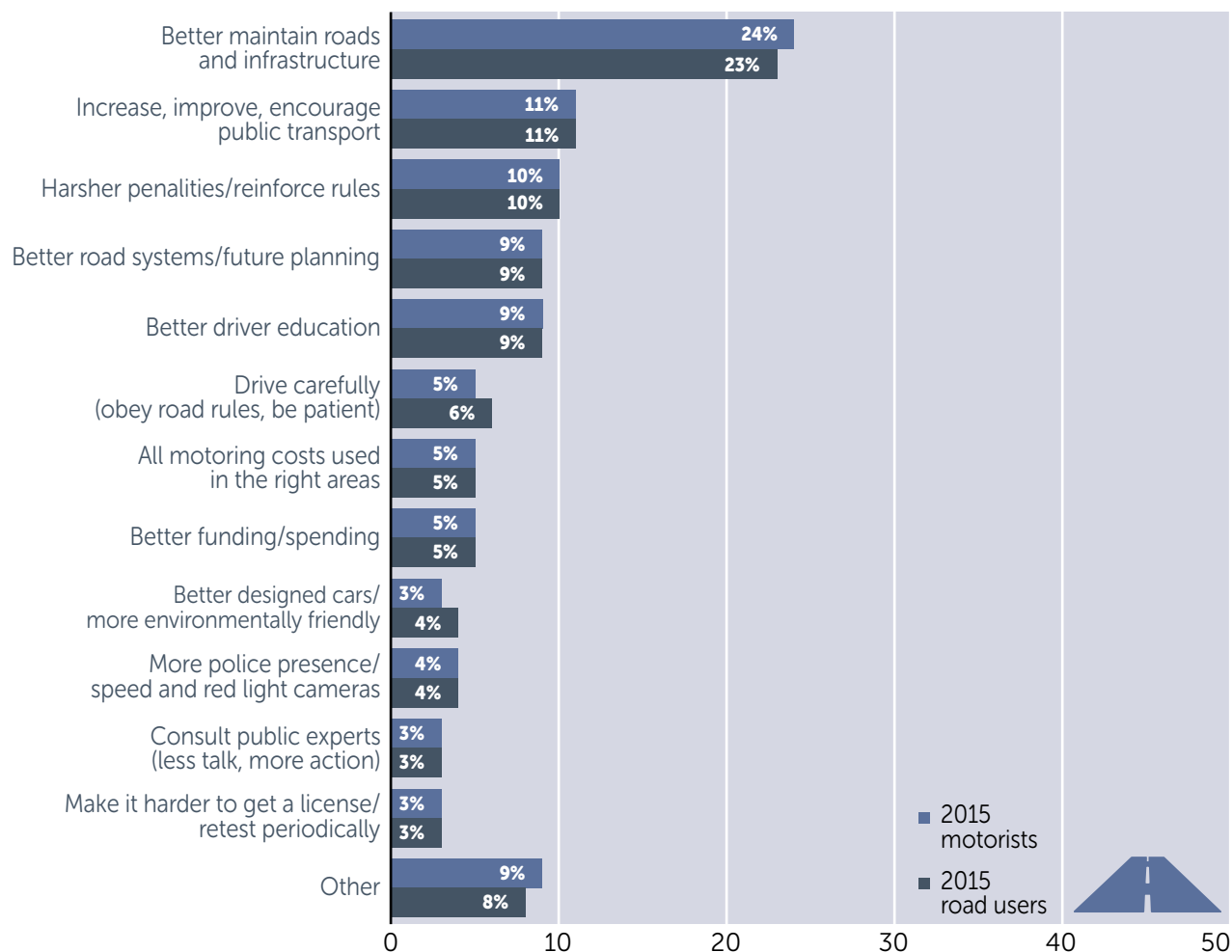
Australians are concerned about road safety and, although they see this as primarily an issue of personal responsibility, they are firm in the actions they want taken to make roads safer.

When asked about the priority in tackling their number one safety concern, 24 per cent of motorists and 23 per cent of road users want better maintained roads and infrastructure.

Second to this 11 per cent of both want more available and better quality public transport.

At equal fourth highest priority for Australians, 9 per cent of both road users and motorists see better driver education as a priority.

PRIORITY ACTIONS TO IMPROVE ROAD SAFETY



CONGESTION & TRANSPORT INFRASTRUCTURE

The state of transport infrastructure and road conditions is nominated as an important concern by 92 per cent of Australians surveyed and is the top concern for 12 per cent.

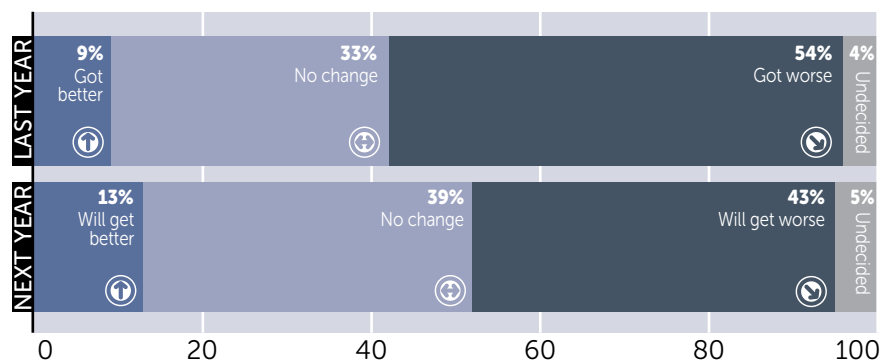
Road congestion is nominated as an important concern by 88 per cent of Australians surveyed and is the top concern for 13 per cent.

Transport infrastructure and funding

As reported on page 10, 77 per cent of those surveyed said congestion had worsened over the past year with 67 per cent expecting it will worsen further in the coming year. Only 2 per cent reported an improvement with just 5 per cent expecting an improvement in the coming year.

The majority of those Australians surveyed are reporting that the state of infrastructure and roads deteriorated over the past 12 months. Forty-three per cent expect conditions to further worsen in the coming 12 months.

TRANSPORT INFRASTRUCTURE AND ROADS EXPERIENCES AND EXPECTATIONS



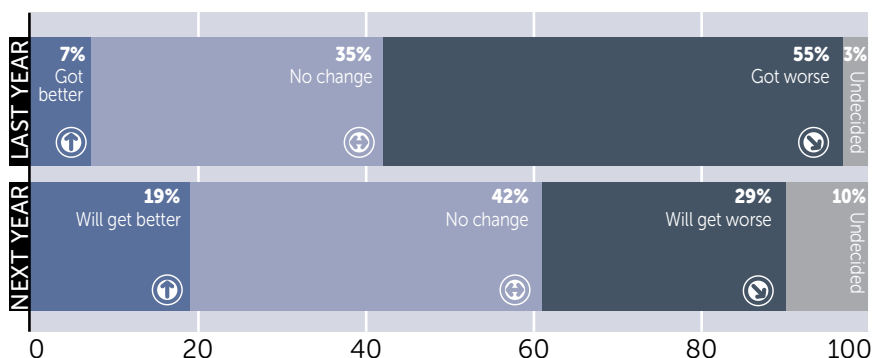
MOTORISTS' CONCERNS IN DETAIL

CONGESTION & TRANSPORT INFRASTRUCTURE

The pessimism regarding the future state of transport infrastructure and roads aligns with pessimism regarding funding expectations for this infrastructure.

Fifty-five per cent of those surveyed report that funding for transport infrastructure worsened over the past 12 months with 29 per cent expecting funding to further worsen in the coming 12 months. Nineteen per cent expect funding to improve in the coming 12 months, 42 per cent expect no change, and 29 per cent expect it to get worse.

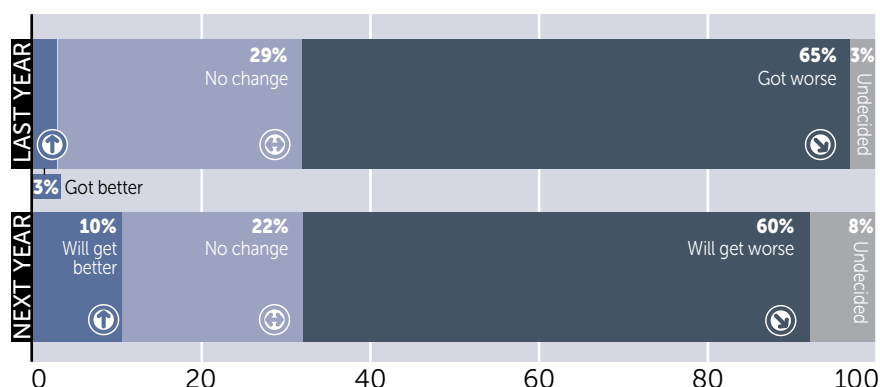
ROAD AND PUBLIC TRANSPORT FUNDING EXPERIENCES AND EXPECTATIONS



Unsurprisingly in light of the information above, Australians surveyed largely report that the amount of fuel excise collected and then invested in transport fell over the past year (65 per cent) with 60 per cent expecting this to continue over the coming year.



AMOUNT OF EXCISE SPENT ON TRANSPORT EXPERIENCES AND EXPECTATIONS

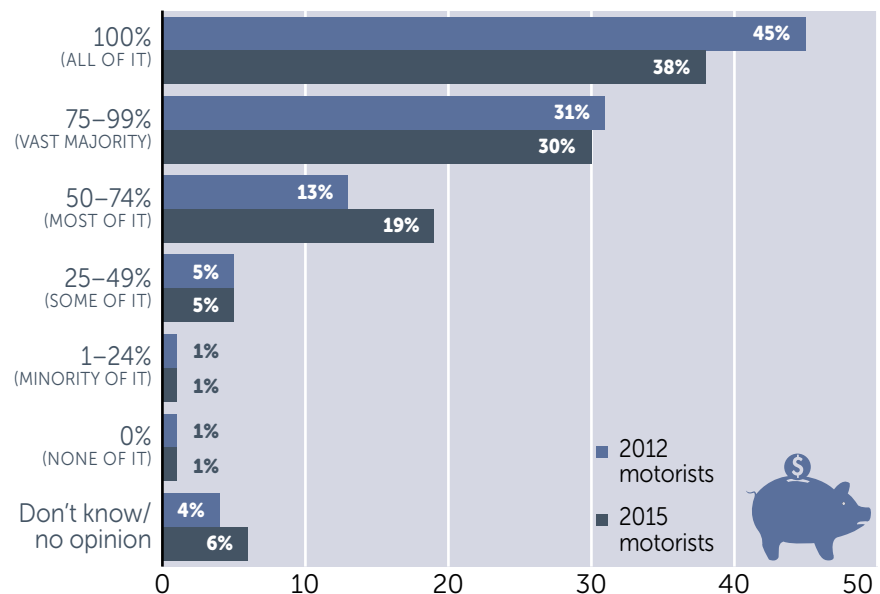


CONGESTION & TRANSPORT INFRASTRUCTURE

Action Australians want taken on congestion and transport infrastructure

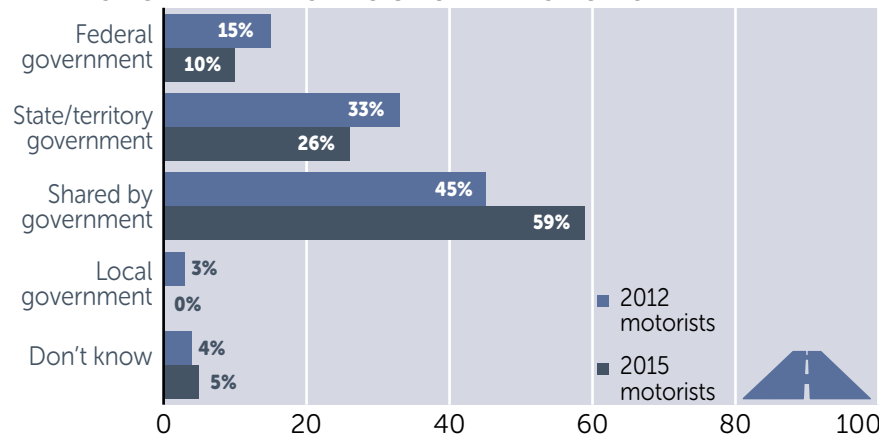
Eighty-seven per cent want more than 50 per cent of their taxes to be invested into road and transport projects.

WHAT PERCENTAGE OF FUEL EXCISE SHOULD BE INVESTED IN ROAD AND TRANSPORT PROJECTS



Motorists also want governments to work together in relation to infrastructure and safety. They increasingly see infrastructure as a shared responsibility between the federal and state and territory governments.

TRANSPORT INFRASTRUCTURE RESPONSIBILITY

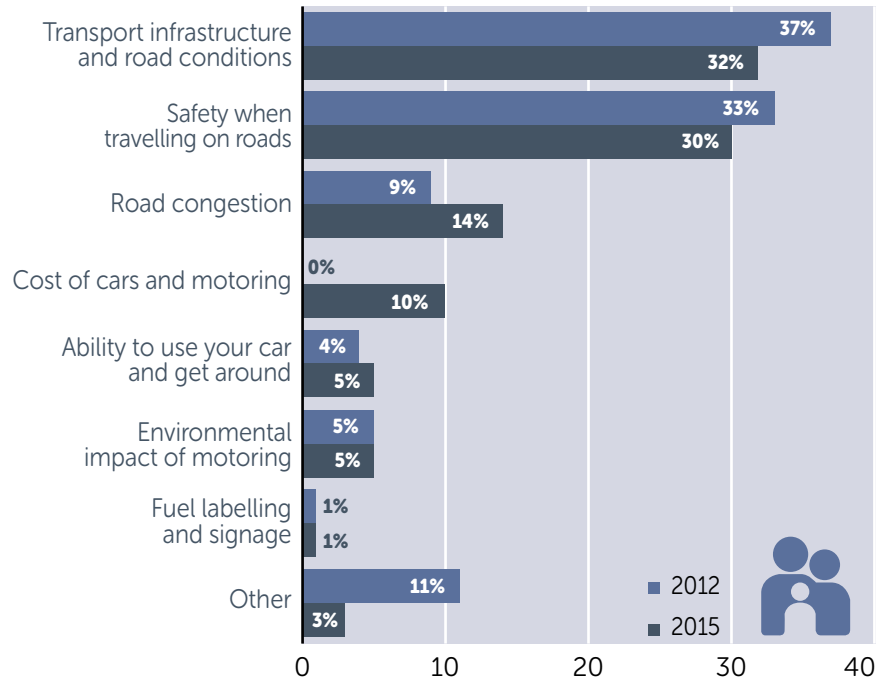


MOTORISTS' CONCERNS IN DETAIL

CONGESTION & TRANSPORT INFRASTRUCTURE

Australians also prioritise infrastructure and congestion in their expectations of government.

SINGLE GREATEST PRIORITY FOR GOVERNMENT AND OTHERS

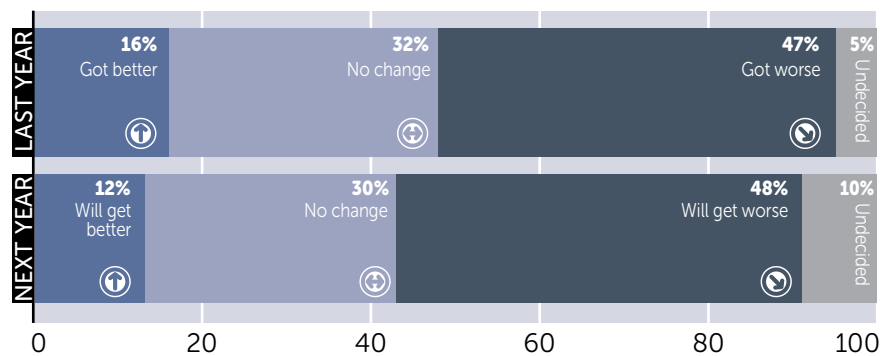


AFFORDABILITY

The cost of cars and motoring including fuel is nominated as an important concern by 88 per cent of Australians surveyed and is the top concern for 19 per cent.

Australians are pessimistic about the costs of running their car with 47 per cent reporting a worsening situation over the past year and 48 per cent expecting it to worsen further over the coming year.

CAR RUNNING COSTS EXPERIENCES AND EXPECTATIONS

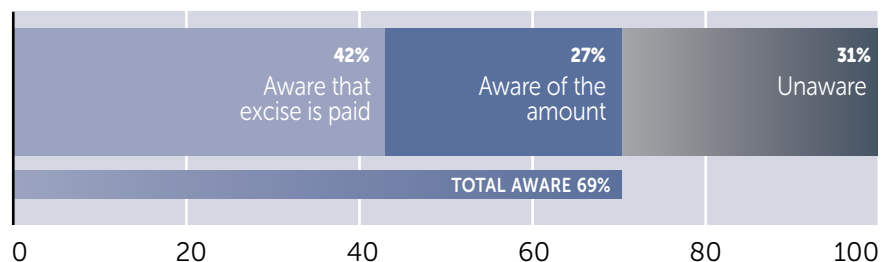


There is very low awareness about fuel excise amongst those surveyed.

Fuel excise

More than one third (31 per cent) are unaware they pay excise on every litre of fuel they purchase, and only 27 per cent are aware of the amount they pay per litre.

AWARENESS OF PAYING FUEL EXCISE TO THE AUSTRALIAN GOVERNMENT



MOTORISTS' CONCERNS IN DETAIL

AFFORDABILITY

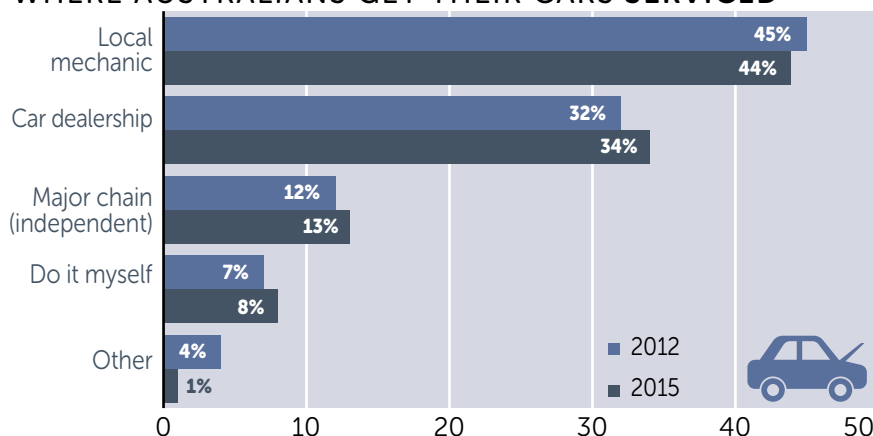
Fifty-one per cent of motorists report delaying servicing due to costs.

Vehicle servicing

Australians are increasingly servicing their cars at six monthly intervals (from 31 to 32 per cent since 2012) and 12 monthly intervals (from 29 to 32 per cent since 2012).

Forty-four per cent of motorists have their car serviced by a local mechanic (45 per cent in 2012) with a slight trend in favour of car dealerships and major independent chains.

WHERE AUSTRALIANS GET THEIR CARS SERVICED



The top reasons provided by motorists for their choice of service provider are cheaper/better/fixed price (30 per cent), reliable/good service (25 per cent)

Action Australians want taken on affordability

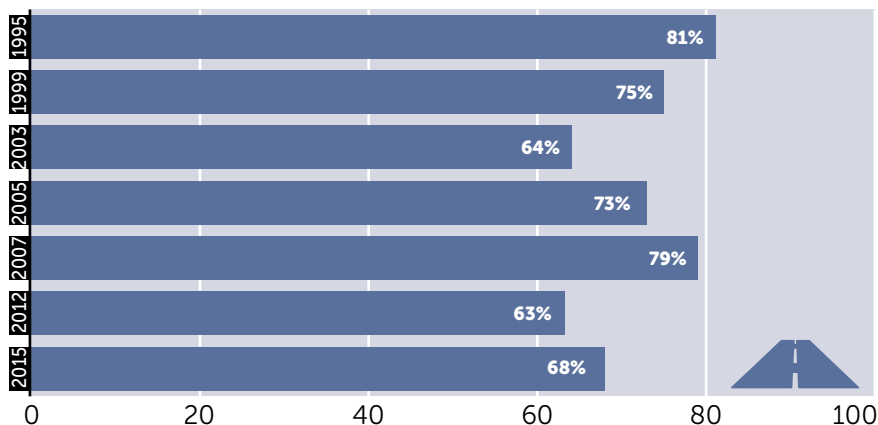
The full range of potential policy responses to motoring affordability have not been surveyed for this publication.

However, when asked about proposed legislative changes that would allow Australians to directly import new cars which would increase domestic competition and help put downward pressure on vehicle prices, a minority of 29 per cent remains to be convinced.

THE ENVIRONMENT

Concerns about the environmental impacts of motoring have risen to 68 per cent from 63 per cent in 2012, however this is well below the highs recorded in 1995 (81 per cent) and 2007 (79 per cent).

MOTORISTS' CONCERN OVER THE IMPACT OF MOTORING ON THE ENVIRONMENT



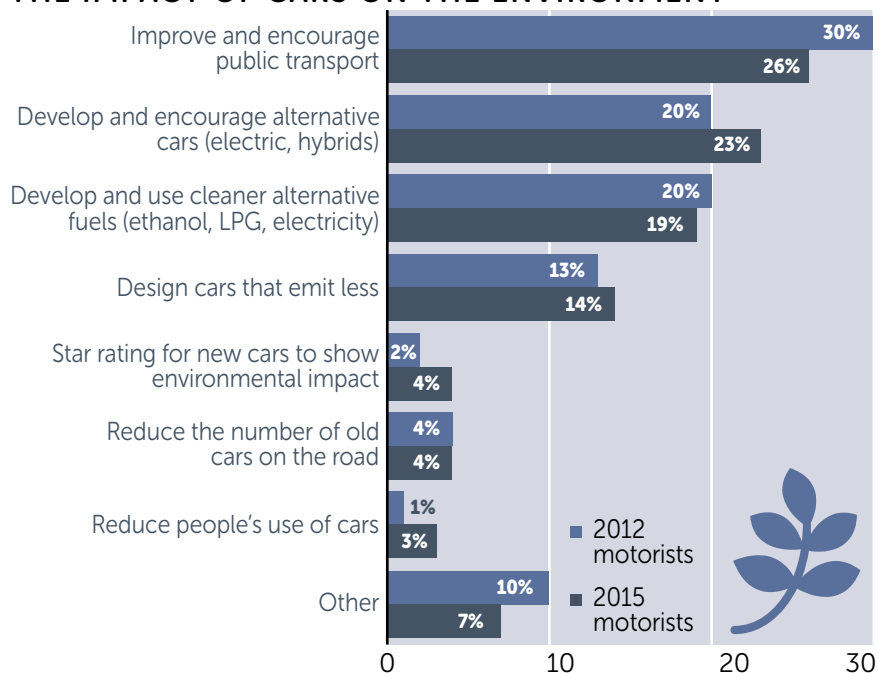
Motorists heavily favour improved public transport (26 per cent) the development of alternative cars (23 per cent) and fuels (19 per cent) as realistic options to reduce the environmental impact of motoring.



Because of the centrality of the car to the daily life of most Australians, and a lack of viable alternatives such as public transport, many feel they can do little to reduce the impact of their car on the environment.



MOST REALISTIC SOLUTIONS TO REDUCE THE IMPACT OF CARS ON THE ENVIRONMENT





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