



## **IBM Commuter Pain Survey announcement: Major Findings Document for Australian cities**

### **AUSTRALIA**

#### **Commuter Pain Index**

- While commuters in Australian cities are happy to complain about delays and stress caused by traffic congestion, when compared with other cities around the world, the level of commuter pain is at the lower end of the spectrum.
- Cities such as Beijing (score 99), Mexico City (99) and Johannesburg (97) lead the Commuter Pain Index. In contrast to these high scores the levels observed for Australian commuters are much lower. Sydney leads for commuter pain with a score of 40, ahead of Brisbane (34), Melbourne (32), Adelaide (22) and Perth (19).
- On this basis Sydney sits somewhere between Madrid (48) and London (36). Perth commuters have one of the lowest index scores of all cities surveyed, on par with New York and between Christchurch (23) and Houston (17).
- Although these index scores might suggest that Australia does not have a significant traffic issue in its main cities, and it is clear that the magnitude of the problem is not on the same scale as a Beijing or New Delhi commuter would face each day, the traffic problems are still impacting negatively on the health and work performance of those that are caught up in it.
- While many of the issues may be seen to be consistent across different international cities there are some important differences in the individual cities that will require a tailored approach to target the specific issues and help ease commuter pain.

#### **The Nature of the Commute**

- Driving is a weekly occurrence for nearly all drivers in select Australian capital cities, with as many as 97% getting behind the wheel at least once a week. Around seven in ten drive everyday.
- Driving on suburban roads is most prevalent (91%). Although driving on highways/ freeways/ expressways is also common (52%), it is more routine for drivers in Perth (60%) and Melbourne (59%) than Adelaide (33%). Driving on downtown city streets is less common in Australian capital cities than other major cities around the world.
- Driving a car alone is the main mode of transportation by which most commute to and from work or school (63%). This is more common in Perth (70%), Brisbane (69%) and Adelaide (67%) than Sydney (62%) and Melbourne (58%).
- Compared to other cities around the World, commuters in Australian cities are much more dependent on the private car and less likely to be using public transport.
- The train is a relatively popular way to commute in larger cities such as Sydney (18%) and Melbourne (14%).
- For trips other than to work or school the profile is quite similar, with driving a car alone being the main mode of transportation (72%). However, carpooling (8%) is the second most popular mode of transportation, ahead of train (5%).

- The typical one-way length of commuting is 19 kilometres, or 32 minutes (average speed of 36 kilometres per hour). While there is little difference between the length of commute across the capital cities, the average time ranged from a low of 27 minutes in Perth to a high of 35 minutes in Sydney.
- The average commute across the range of international cities is 32 minutes, with those in Moscow (42 minutes) and New Delhi (41 minutes) having the longest commute.
- A contributing factor for the traffic congestion in Australian cities is the concentration of movement in peak times. The time of day most commuters typically depart for work or school is between 7.00am and 9.00 am (60%) and leave work or school is between 4pm and 6pm (53%).
- In other international cities there is typically a greater spread of commuting time, especially late in the day. Only 12% of commuters work after 6pm in Perth and Brisbane, while the corresponding figure in Adelaide is 13%. In contrast, 65% stay after 6pm in New Delhi, 64% in Moscow and 48% in Madrid.

### **Perceptions and Other Aspects of the Commute**

- As many as 82% of Australian drivers find aspects of their commute frustrating. Start-stop traffic (57%), low speed (36%), aggressive/rude drivers (30%) and unreliable journey time (26%) all contribute to driver frustration.
- Overall, 40% of Sydney commuters are frustrated by the slow speed of their commute. This is fewer than Beijing, where the figure is 49%, but considerably higher than Mexico City (17%) or New York City (12%).
- Brisbane drivers are rated among the most aggressive in the world. Overall, 38% of commuters in the city rate Brisbane drivers aggressive. This is comparable to Mexico City (41%), Buenos Aires (39%) and Madrid (37%).
- Australians are among the least sensitive in the world when it comes to petrol price rises. In Perth just 18% of those that commute by car would seriously look at alternative options if the price of petrol increased by 30%. In Adelaide, 21% of car commuters would consider alternatives with such a price rise and in Sydney the comparable figure is 22%. In contrast, a 30% petrol price hike would result in 56% of commuters in New Delhi and 50% in Beijing looking at other options.
- Commuters in Australia are less likely to work from home than commuters in other international cities. Only 24% of those in Perth ever work from home and the comparable figures in other cities are 25% in Adelaide, 26% in Brisbane, 30% in Sydney and 34% in Melbourne. In many European and American cities around 40% of commuters or more would spend at least one day a week working from home.
- Many commuters feel that if their daily commute could be significantly reduced there are many other things they would rather do with their time. Most would prefer to spend more time with family (52%), exercise (51%) or sleep (50%). While some men would rather work (13%), women would rather do the housework (36%), visit friends (32%) or go shopping (28%).
- Around half (48%) of those who drive feel that roadway traffic has become worse in the last three years, with 15% feeling it has become a lot worse. On the other hand, as many as 36% feel it has remained the same and 16% feel it has improved. Baby Boomers (58%) are more likely to feel that roadway traffic has become worse than the Gen Y cohort (35%). Drivers in Brisbane (55%) and Sydney (53%) are also more likely to feel that roadway traffic has become worse than those in Perth (37%).

- Traffic delays are a familiar experience for most drivers and one in three (35%) report having been stuck in a traffic jam for one hour or more in the past 3 years. Motorists in Sydney (41%) are much more likely to have been stuck in a traffic jam for one hour or more than their counterparts in Adelaide (16%).
- Roadway traffic/congestion is worse in some areas than others, with the main black spots being major intersections (50%), around road works (38%) and school zones (34%). In Adelaide, road works are considered a major cause of congestion.

### **The Consequences of Traffic**

- The consequences of congestion on the roads extend beyond the immediate frustration that can result, with many motorists reporting negative impacts on their health and performance.
- As many as 81% of drivers experience travel stress with Sydney drivers (84%) more likely to feel stressed than Perth drivers (71%). However, across all Australian cities much of this stress could be reduced by the greater use of technology in the management of traffic flows and the adoption of more flexibility in the way we approach work.
- Almost half (47%) of drivers believe that improved public transportation will help reduce travel stress and this can be achieved by sophisticated analytics of transport systems. Greatest interest for improved public transport may be observed among Sydney drivers (52%) whereas Adelaide drivers (37%) have the least interest in this option.
- Other technological solutions include working from home (35%) and accurate and timely road conditions information (31%).
- As many as 41% of drivers believe that traffic has negatively affected their health. This is highest among drivers in Sydney (50%) and lowest in Adelaide (28%) and Perth (28%).
- Among those who believe that traffic has negatively affected their health increased stress (77%) and anger (52%) are the primary symptoms.
- As many as 39% of drivers believe that traffic has negatively affected their performance at work or school. This is highest among those in Sydney (50%).
- In the last three years, 22% of drivers have found that roadway traffic has been so bad that they turned around and went home. This response to chronic congestion is highest in Sydney (27%) and Brisbane (25%) and lowest in Adelaide (11%) and Perth (11%).
- These symptoms of chronic congestion are much more common overseas. In Beijing as many as 69% of drivers have been forced to turn around and return home in the past three years and the corresponding figure for New Delhi is 58%.
- One in three (33%) drivers have decided not to make a driving trip in the last month. Most of these trips were cancelled due to anticipated traffic conditions (53%). Some drivers did not cancel their trip but chose to go by public transport (26%) or an alternative mode of transport (22%).
- When drivers cancelled a recent driving trip, the destination was mostly recreation (25%), shopping (21%) or work (17%).

### **Sydney**

- The Commuter Pain Index score for Sydney is 40. This is the highest of any city in Australia but at the lower end of the spectrum when compared to other international cities. On this basis Sydney sits somewhere between Madrid (48) and London (36).

- Commuters in Sydney (62%) are more dependent on the private car and less likely to be using public transport than commuters in other parts of the World. Compared to other Australian cities, the train is relatively popular with 18% commuting by train.
- The average commute in Sydney takes 35 minutes and covers 20 kilometres at an average speed of 34 kilometres an hour.
- A contributing factor for the traffic congestion in Sydney is the concentration of movement in peak times. Only 20% of commuters work after 6pm in Sydney. This is high by Australian standards but well below levels observed in other international cities.
- As many as 85% of Sydney drivers find aspects of their commute frustrating, with start-stop traffic the biggest problem. The slow speed of the commute is also a frustration for 40% of Sydney drivers.
- Sydney drivers are among the least sensitive in the world when it comes to petrol price rises. Just 22% of those that commute by car would seriously look at alternative options if the price of petrol increased by 30%.
- Only 30% of Sydney commuters ever work from home. This is low by World standards.
- 53% of Sydney drivers feel that roadway traffic has become worse in the last three years.
- 41% of Sydney drivers have been stuck in traffic for one hour or more in the last three years.
- Sydney drivers are more likely than their counterparts in other Australian cities to have experienced travel stress. As many as 84% of Sydney drivers experience travel stress.
- Sydney drivers (52%) show more interest than those in other Australian cities for improved public transport as a way of reducing travel stress.
- 50% of Sydney drivers believe that traffic has negatively affected their health, with stress being the primary symptom.
- As many as 50% of Sydney drivers believe that traffic has negatively affected their performance at work or school.
- In the last three years, 27% of drivers have found that roadway traffic has been so bad that they turned around and went home and 39% have decided not to make a driving trip in the last month.

### **Brisbane**

- The Commuter Pain Index score for Brisbane is 34. On this basis Brisbane sits somewhere between Paris (36) and Toronto (32).
- Commuters in Brisbane (69%) are much more dependent on the private car and less likely to be using public transport than commuters in other parts of the World.
- The average commute in Brisbane takes 29 minutes and covers 19 kilometres at an average speed of 39 kilometres an hour.

- A contributing factor for the traffic congestion in Brisbane is the concentration of movement in peak times. Only 12% of commuters work after 6pm in Brisbane. This is well below levels observed in other international cities.
- As many as 80% of Brisbane drivers find aspects of their commute frustrating, with start-stop traffic the biggest problem.
- Brisbane drivers are rated among the most aggressive in the world.
- Brisbane drivers are among the least sensitive in the world when it comes to petrol price rises. Just 29% of those that commute by car would seriously look at alternative options if the price of petrol increased by 30%.
- Only 26% of Brisbane commuters ever work from home. This is low by World standards.
- 55% of Brisbane drivers feel that roadway traffic has become worse in the last three years. This is high relative to other Australian cities.
- 37% of Brisbane drivers have been stuck in traffic for one hour or more in the last three years.
- As many as 81% of Brisbane drivers experience travel stress and 45% cite improved public transport as a way of reducing this stress.
- 35% of Brisbane drivers believe that traffic has negatively affected their health, with stress being the primary symptom.
- As many as 33% of Brisbane drivers believe that traffic has negatively affected their performance at work or school.
- In the last three years, 25% of drivers have found that roadway traffic has been so bad that they turned around and went home and 31% have decided not to make a driving trip in the last month.

## Melbourne

- The Commuter Pain Index score for Melbourne is 32. On this basis Melbourne is on par with Toronto and sits somewhere between Paris (36) and Auckland (28).
- Although there is greater use of public transport in Melbourne than other Australian cities, Melbourne commuters (58%) are still more dependent on the private car than commuters in other parts of the World. The most popular forms of public transport in Melbourne are train (14%) and tram (5%).
- The average commute in Melbourne takes 32 minutes and covers 18 kilometres at an average speed of 34 kilometres an hour.
- A contributing factor for the traffic congestion in Melbourne is the concentration of movement in peak times. Only 18% of commuters work after 6pm in Melbourne. This is high by Australian standards but well below levels observed in other international cities.
- As many as 83% of Melbourne drivers find aspects of their commute frustrating, with start-stop traffic the biggest problem.

- Melbourne drivers are among the least sensitive in the world when it comes to petrol price rises. Just 25% of those that commute by car would seriously look at alternative options if the price of petrol increased by 30%.
- Only 34% of Melbourne commuters ever work from home. While higher than any other Australian city, this remains low by World standards.
- 45% of Melbourne drivers feel that roadway traffic has become worse in the last three years.
- 35% of Melbourne drivers have been stuck in traffic for one hour or more in the last three years.
- As many as 81% of Melbourne drivers experience travel stress and 50% cite improved public transport as a way of reducing this stress.
- 43% of Melbourne drivers believe that traffic has negatively affected their health, with stress being the primary symptom.
- As many as 39% of Melbourne drivers believe that traffic has negatively affected their performance at work or school.
- In the last three years, 22% of drivers have found that roadway traffic has been so bad that they turned around and went home and 34% have decided not to make a driving trip in the last month.

#### Adelaide

- The Commuter Pain Index score for Adelaide is 22. This is low by World standards and on this basis Adelaide sits somewhere between Christchurch (23) and New York (19).
- Commuters in Adelaide (67%) are much more dependent on the private car and less likely to be using public transport than commuters in other parts of the World.
- The average commute in Adelaide takes 29 minutes and covers 18 kilometres at an average speed of 37 kilometres an hour.
- A contributing factor for the traffic congestion in Adelaide is the concentration of movement in peak times. Only 13% of commuters work after 6pm in Adelaide. This is well below levels observed in other international cities.
- As many as 81% of Adelaide drivers find aspects of their commute frustrating, with start-stop traffic the biggest problem.
- Adelaide drivers are among the least sensitive in the world when it comes to petrol price rises. Just 21% of those that commute by car would seriously look at alternative options if the price of petrol increased by 30%.
- Only 25% of Adelaide commuters ever work from home. This is low by World standards.
- 43% of Adelaide drivers feel that roadway traffic has become worse in the last three years with road works considered a major cause of congestion.
- Despite this deterioration only 16% of Adelaide drivers have been stuck in traffic for one hour or more in the last three years. This is very low by World standards.

- While the Adelaide motorist is less likely to be stuck in traffic for long periods as many as 77% still experience travel stress.
- 28% of Adelaide drivers believe that traffic has negatively affected their health and 26% believe that traffic has negatively affected their performance at work or school.
- 23% of Adelaide drivers have decided not to make a driving trip in the last month.

## Perth

- The Commuter Pain Index score for Perth is 19. This is low by World standards and on this basis Perth is on par with New York and between Christchurch (23) and Houston (17).
- Commuters in Perth (70%) are much more dependent on the private car and less likely to be using public transport than commuters in other parts of the World.
- The average commute in Perth takes 27 minutes and covers 21 kilometres at an average speed of 47 kilometres an hour. The highest average speed of any Australian city.
- A contributing factor for the traffic congestion in Perth is the concentration of movement in peak times. Only 12% of commuters work after 6pm in Perth. This is well below levels observed in other international cities.
- As many as 75% of Perth drivers find aspects of their commute frustrating, with start-stop traffic the biggest problem.
- Perth drivers are also rated quite aggressive and second only to Brisbane drivers in this regard.
- Perth drivers are among the least sensitive in the world when it comes to petrol price rises. Just 18% of those that commute by car would seriously look at alternative options if the price of petrol increased by 30%. This is low when compared to other Australian cities and well below the levels observed in other international cities.
- Only 24% of Perth commuters ever work from home. This is low by World standards.
- 37% of Perth drivers feel that roadway traffic has become worse in the last three years.
- 26% of Perth drivers have been stuck in traffic for one hour or more in the last three years. This is relatively low when compared to other international cities.
- While the Perth motorist is less likely to be stuck in traffic for long periods as many as 71% still experience travel stress.
- 28% of Perth drivers believe that traffic has negatively affected their health and 26% believe that traffic has negatively affected their performance at work or school.
- 21% of Perth drivers have decided not to make a driving trip in the last month.

## SURVEY METHODOLOGY

- IBM completed the Australian Commuter Pain survey online among drivers aged 18-64 years in 5 major Australian cities during October 2010 in: Sydney, Melbourne, Brisbane, Adelaide and Perth.

- Galaxy Research designed the questionnaire. The questionnaire was transferred into Quest format in order to be hosted online. For each question the respondent had to click on the response which represented their answer.
- The sample was 1,556 respondents in Australia, distributed throughout Sydney, Melbourne, Brisbane, Adelaide and Perth. Fieldwork commenced on Friday 1 October and was completed on Friday 8 October, 2010.
- Following the completion of interviewing, the data was weighted by age, gender and area to reflect the latest population estimates.