Moving Australia Forum
ANCAP Update
Federal Budget Analysis
CEDA Report – Infrastructure: Getting on With the Job
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Delivering for our Members

The Australian Automobile Association has a mission to provide a strong, effective and collective voice for the Australian motoring community. To achieve that mission, we believe it is important to promote research and to advocate policy and technical improvements in motoring. Motoring Directions is one of the important ways we can bring together a range of issues for consideration - not only by motorists, but by the many people who influence policy affecting motorists.

Working Together

In the last few months, AAA has been active in working with others to address issues of common interest.

This has included work with the Federal Chamber of Automotive Industries and the Australian Institute of Petroleum in a forum entitled Moving Australia, and also with the Committee for Economic Development of Australia and a wide range of industry associations to publish a report called “Infrastructure – Getting on With the Job”. This edition of Motoring Directions takes some of the key components of both the forum and the report to provide a short summary to interest readers in seeking out further information.

At the Moving Australia Forum, Glenn Hewson from Exxon demonstrated future energy demands for road vehicles and identified the continuing contribution needed from oil and gas. He noted that, even if alternative energies such as solar and wind were to grow 10% annually, they would still only be contributing 1% of world energy demand in 2030.

The level of oil and gas reserves is an issue for many motorists. There are two schools of thought on future reserves, and a detailed assessment of these is provided in a recent publication of the Department of Transport and Regional Services’ Bureau of Transport and Regional Economics entitled “Is the World Running Out of Oil? A review of the debate”.

This report is available directly from the Bureau and sets out in a balanced way the views of the “depletionists” and the “anti-depletionists”. I have included a table of the characteristic differences between these two groups, taken directly from the working paper (Table 1).

Ensuring Public Debate

It is important in the public debate to ensure that all aspects of issues are considered. The role of the AAA is to seek out the various views of professionals and specialists on issues which do directly impact on motorists. In many cases it is not easy to draw a final conclusion – but it is essential to understand the issues in the debate.

In this edition, we also provide an analysis of the recent Federal Budget, an update of the Australasian New Car Assessment Program, of which we are a partner, and also some detailed analysis of what motorists are thinking following a national survey undertaken for us by ANOP Research.

In seeking to ensure improvements in motoring, we are committed to improving safety. Safer drivers in safer cars on safer roads is becoming an important concept in what is referred to as a “systems” approach to road safety. Details are set out in Dr Ken Odgen’s paper in this edition. Our polling shows that motorists are extremely concerned about the behaviour of other drivers and, to a lesser extent, concerned about the safety of their cars and the safety of the road network.

While there is an increasing concern for aspects of car and vehicle safety, it will be important that the three factors of drivers, cars and roads, are
considered as a system rather than individual issues to be addressed separately if we are to be effective in achieving the national road safety target.

Five people die every day on Australian roads and sixty are seriously injured. The national road safety target calls for a reduction of 40% in fatalities from road crashes by 2010, a task which may be difficult but not unachievable. We have identified a substantial backlog in funding of our road infrastructure – infrastructure identified as essential for achieving that road safety target.

Our budget analysis shows that, while we have seen some improvement in road funding and an important change in philosophy in national road funding through the AusLink program, much remains to be done.

Lauchlan McIntosh  
Executive Director, AAA
A forum on the future of motoring in Australia has concluded that new technologies for motor vehicle and road design, improved fuels and a systems approach to road safety can be combined to create safer roads and a cleaner environment. The Moving Australia Forum, conducted at Parliament House in Canberra, called on industry and motorists to work together in a holistic way to reduce the impacts of motor vehicle use.

The forum brought together the views of the Federal Chamber of Automotive Industries (FCAI), representing car manufacturers and distributors, the Australian Institute of Petroleum (AIP), oil producers and refiners, the Australian Automobile Association (AAA), motorists, as well as guest speakers and government leaders.

Former Deputy Prime Minister and Minister for Transport & Regional Services, the Hon John Anderson, used the forum to announce the appointment of an advisory group for the Federal Government’s Young Driver Education Trial. The trial is the first step in implementing the government’s election commitment to a national young driver education program by 2007.

Rapid Advances

The Deputy Prime Minister noted the rapid advances in motor vehicle safety systems and called on the automotive industry to advise him whether current vehicle design rules were preventing the introduction of some safety innovations.

Dr Ken Ogden, General Manager of Public Policy with the Royal Automobile Club of Victoria, called for a “systems” approach to road safety to assist in meeting the national goal of reducing fatalities from road crashes by 40% by 2010.

Dr Ogden said that road safety policy needed to move beyond the current preoccupation with human error and give greater focus to building safer roads. He said a new program assessing the relative safety of the road network, the Australian Road Assessment Program (AusRAP), was to be introduced by the AAA.

Managing Director of ANOP Research Services Pty Ltd, Rod Cameron, released details of the latest AAA polling on motorists’ attitudes to road issues.

Mr Cameron said the research showed an increased public concern about other drivers’ behaviour, as well as an increasing recognition of the importance of better roads and a shift in emphasis on environmental concerns. Motorists also indicated as “extremely important” the need for Governments to spend on infrastructure rather than continue to build a budget surplus.

Executive Director of Engineering with Holden Ltd, Tony Hyde, presented a paper on emerging vehicle safety technologies which included stability control and advanced braking systems, as well as new engine technologies and their impact upon the environment.

Mr Hyde said in order for the automotive industry to meet the voluntary fuel consumption targets set by the FCAI, car makers would need not just new vehicle technologies but also the widespread use of high octane and low sulphur fuels.

The Federal Industry Minister, the Hon Ian Macfarlane, said the phased introduction of lower sulphur fuels over the next few years would bring many benefits - but also some costs. He said the Australian petroleum industry would spend an estimated $2 billion between now and 2010 on infrastructure improvements needed to introduce lower sulphur fuels.

Fuels Outlook

The petroleum industry’s outlook on fuel supply and quality in Australia and Asia was presented by Exxon Mobil Australia’s Glen Henson.

Mr Henson said that petroleum would continue to be the dominant automotive fuel in Australia for a long time to come. Mr Henson said that much more research and development was necessary to reduce the costs of alternatives such as hydrogen.

The Executive Director of the AIP, Dr John Tilley, and the Chief Executive of the FCAI, Peter Sturrock, both spoke of the need for government policy settings for future fuels to encourage certainty for manufacturers and refiners. The
Executive Director of the AAA, Lauchlan McIntosh, recommended that a Task Force of government, industry and consumers be established to ensure the benefits identified in the Moving Australia Forum can be achieved.

Fuels Outlook in Australia and Asia
Glenn Henson
Director, Refining Australia/New Zealand
Exxon Mobil Australia

The fuel supply and demand chain involves many stakeholders. At one level we have oil producers, suppliers, distributors, retailers, vehicle manufacturers and customers. But linked to each of these we have regulators, materials and service providers, employees and the broader public.

However, while the players are many, our primary goals are the same – we all want affordable, reliable, clean energy supplies now and through for our grandchildren’s grandchildren.

In this part of the world, vehicle fleets are expanding rapidly. It is projected that Asia’s car population could rise from about 60 million to over 400 million by 2030.

So fuel demand will grow accordingly, despite continuing expected improvements in vehicle engine efficiency. Demand for road fuels in Asia Pacific right now is around 6.5 million barrels per day – Australia uses about 10 per cent of that. However, by 2030, Asia Pacific demand is projected to rise to over 16 million barrels per day. And it is safe to say the lion’s share of that growth will be outside Australia.

We hear a great deal about alternative energies, but when you consider the size of the energy market you soon realise people are talking more about supplementary energies rather than any real alternative to petroleum.

The growth rate for wind and solar energy, for example, is very high – much higher in fact than for oil and gas. But even if they continue to grow at 10% annually for the next three decades – and this is a pretty aggressive assumption – their contribution would still be less than 1% of world energy demand in 2030.

The Safer Systems Approach to Road Safety
Ken Ogden
General Manager, Public Policy
Royal Automobile Club of Victoria (RACV)

A key issue for the automobile Clubs and their members is, and always has been, safe motoring. The Clubs have a long history of involvement in this area, both as advocates for safer vehicles, safer roads and safer users, and also as the providers of consumer information to our members to assist them to make more informed motoring decisions.

The community’s approach to thinking about road safety has gone through a number of phases over the decades, each phase bringing new insights, new ways of approaching the problem, and new solutions. We now are entering into another new way of thinking, one that has been described as “Safer Systems.”
Without wanting to be too definitive, I think that there are a number of characteristics of this systems thinking, including:

- realising that we must think of the transport system and its failures (including road crashes) in a more holistic way;
- recognising that humans are not perfect decision makers – rather, mistakes, errors of judgement, and poor driving decisions are intrinsic, and the system needs to be designed and operated in recognition of this fact – especially if the human is impaired in any way;
- safety can and should be built into the system in a comprehensive and systematic fashion, not just having the apparent problem areas patched up;
- the “engineered” elements of this system – vehicles and roads – can be designed to be compatible with the human element, perhaps taking the lesson from motor racing that while crashes can and will occur, the total system is designed to minimise harm; and
- finally, that it is morally unacceptable to deliberately plan for a certain level of road trauma - taking the lesson from occupational health and safety programs that fatalities are not to be consciously planned for. This does not mean that they will not occur, but that every fatality is an exception.

In the past, because of the observation that of over 90% of crashes result from some form of human error, many road safety programs have focused on “fixing the driver”, and often public opinion has been to “blame the victim”. Undoubtedly behaviour-based programs have been effective (seatbelt wearing, drink driving, and perhaps speed management), and must continue. Some drivers behave with criminal disregard for the safety of others, and they should expect tough policing and tough penalties.

Human Error

But many people are involved in crashes when they or others make ordinary everyday human mistakes. It has been estimated that between 1 in 100 and 1 in 500 driving decisions can be wrong - involving a mistake, an error of judgement, a missed signal or the like.

This notion - that we need to protect against human error and recognise that it is an intrinsic part of human behaviour - is well understood in the aviation and rail transport sectors and in workplace safety. It is not yet well entrenched in road safety.

Yet it is at the heart of philosophies such as Vision Zero, which essentially say that a law abiding motorist in a safe, modern car should not die as a consequence of a crash. In other words the challenge is to design the road environment such that a “5 star” driver in a “5 star” car will not die if they are on a “5 star” road.

The concept of a “5 star” road is the product of evolving road assessment programs such as EuroRAP and AusRAP.

Again let me say that we know what a 5 star car is, a 5 star driver is one who is obeying all the rules, and a 5 star road is one designated as such with a road assessment program.

Evolution

This systems approach to thinking about road safety has evolved from several sources – lessons from other modes, lessons from occupational health and safety, and so forth. But I think also that there is a dawning realisation that although the approaches that we have been using in recent decades have been highly successful in reducing the extent of road trauma, they are unlikely to achieve the “vision zero” outcome, and moreover there may be only limited potential for future gains.
ANCAP Update

Pole Crash Test Results and ESC

James Hurnall, Director Technical Services

Introduction

The Australian New Car Assessment Program (ANCAP) has been crash testing and reporting on the performance of passenger cars and light commercial utilities sold in Australia since 1993. ANCAP is a consortium of all the Australian motoring clubs, all Australian state governments, the New Zealand national government, the New Zealand Automobile Association and the international FIA Foundation.

ANCAP consistently maintains current results for at least 70%, by volume, of the new car market in Australia and New Zealand. The programs conducted over 2004/05 and planned for the next 12 months will continue this coverage.

Up until mid-2004, ANCAP continued to crash test and evaluate passenger cars to the same test and evaluation protocols as used by EuroNCAP. Over the last year, ANCAP has undertaken a program of pole tests on the popular selling passenger four wheel drives (4WDs) to assess head protection in side impacts.

ANCAP – with input from the Australian vehicle industry – has also reviewed its scoring system to encourage improvements in head protection during side impacts. With the updated scoring system in place, the next step is to consider future activities to encourage improvements in occupant protection.

Success of ANCAP

ANCAP has proven to be a highly successful program with the majority of cars tested now achieving 4 or 5 stars (see graph below).

ANCAP – as is the case with other international New Car Assessment Programs (NCAPs) conducted in Europe, Japan and the US - provides market pressure on manufacturers to produce vehicles with state of the art occupant protection levels through provision of easy to use and understand rating systems rating the crashworthiness of passenger cars. The following quotes from two manufacturers acknowledged as leaders in vehicle safety technology demonstrate the effectiveness of these consumer crash test programs;

The benefits of a consumer crash test program

“Euro NCAP does a great job in raising the prominences of safety issues.”

1
“With established consumer tests like IIHS, Euro NCAP, US NCAP, Japan NCAP and Australian NCAP (which are received well by the public), the general vehicle passive safety performance considerably exceeds current legal requirements.”

have been demonstrated through the introduction of vehicles with safety technology that exceed the minimum regulatory requirement. International studies show cars that perform better in crash tests provide better occupant protection than vehicles that perform poorly in crash tests.

• A US study\(^2\) found “a driver is 74% less likely to die in cars rated good than cars rated poor in a car-to-car head-on crash with two cars of similar mass.”
• A Swedish study\(^4\) found “cars with three or four stars are approximately 30% safer than cars with two stars.”
• Studies conducted by Monash University Accident Research Centre concluded that vehicles which performed well in crash tests provided higher levels of safety on Australian roads.

In addition to the low cost and the high returns of consumer crash test programs, ANCAP has demonstrated other benefits, which include the ability to implement a new or updated test program quicker than introducing a new regulation, and providing information that allows the market to determine an acceptable level of safety which may be higher than the minimum regulatory standard.

### 4WD Pole Test Program

One of the fastest growing segments of the Australian new car market over recent years has been the passenger 4WDs - also know as sport utility vehicles (SUVs). This segment now accounts for approximately 20% of new passenger cars sold.

To assess the safety of this important segment of the Australian new car market, ANCAP reviewed the options for assessing side impact protection, then embarked on a program to pole test passenger 4WDs. The Australian Federal Government (through the Australian Transport Safety Bureau) is cooperating with ANCAP in this test program, as it will provide data for input into the government’s side impact research program.

In the first phase, a small number of models with and without head protecting side airbags were selected to demonstrate their effectiveness in reducing head injury. The vehicles tested in this initial phase of the program were Toyota Prado (with and without curtain airbag), Mitsubishi Pajero (with and without chest side airbag), Ford Escape (without any side airbag) and Mazda Tribute (with combination side airbag). Initial results were released in late-November 2004, focusing on the benefits of head protecting side airbags.

The second phase of the test program included other top-selling passenger 4WD vehicles - Nissan X-trail, Toyota Rav 4 (with and without curtain airbag), Honda CR-V, Toyota Landcruiser, Nissan Patrol and Lexus 330. The Federal Minister for Roads, Mr Jim Lloyd, and the ANCAP Chair,

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**Side airbags are designed to help protect your head and/or chest in a serious side crash. The main types of side airbags are:**

• Chest side (torso) airbag – normally deploy from the driver and front passenger seats to protect the chest or torso.

• Combination side (head/torso) airbag – side torso airbag with a vertical extension to protect the occupants head in addition to the torso.

• Head (curtain airbag) – deploys from the vehicles roof rail (just above the door), covering the front and rear side windows, to protect the front and rear seat occupants’ head.
Mr Lauchlan McIntosh, launched the results on 1 June 2005 and spoke about the benefits of head protecting side airbags.

In addition to promoting the benefits of head protecting side airbags, ANCAP also highlighted the benefits of various significant safety features such as electronic stability control (ESC). Unfortunately, a full set of airbags and ESC are not available on all specification levels of these popular selling passenger 4WDs (see above table).

ANCAP is currently conducting offset frontal crash tests on all of the 4WDs in phase I and II to produce an overall star rating (based on the EuroNCAP scoring protocols with the ANCAP revisions – see following). The final phase of this program will include cross-over vehicles such as Holden Adventra, Ford Territory, Toyota Kluger and Subaru Outback.

ANCAP expects to have the overall star ratings released before the end of 2005.

### New Rating Scheme

Along with the pole test program, ANCAP engaged with the Australian vehicle industry to review its test and rating system - currently the same as EuroNCAP.

The basic principles for the revised rating system agreed to by ANCAP and the industry were:

- Retain 5 stars as the maximum score;
- A vehicle can only achieve 5 stars if fitted with effective head protecting side airbags;
- Continue with the offset frontal crash test (with same scoring system currently used);
- Keep the mobile deformable barrier (MDB) side impact test;
- Maintain harmonisation of overall score and star rating with EuroNCAP to prevent confusion for the new car buyer.
As a result of the review, ANCAP has decided to remain harmonised with EuroNCAP, with the following exceptions:

- ANCAP will not conduct the MDB test on high seated vehicles ('h'-point > 700 mm) – these vehicles receive a default of 16 points (ie: the maximum points available for a MDB side impact test);
- ANCAP may conduct a pole test if a variant of the vehicle has head protecting side airbags and will score the test as per EuroNCAP. In EuroNCAP, this is an optional test funded by the vehicle manufacturer;
- Tested vehicles will need to have effective head protection in side impacts (ie: achieve at least one point out of the possible two points in the pole test) to achieve the maximum ANCAP rating of 5 stars.

This revised rating system will be used by ANCAP to rate the passenger 4WDs currently under test.

ANCAP is confident that the revised rating system will result in an increase in the fitting rate of head protection in all passenger cars, and especially 4WDs, with the corresponding result in a reduction in fatal and severe head injuries from side impact crashes.

**ANCAP Next Steps**

ANCAP is not resting on the success achieved to date, as there is more to be done to influence improvements in passenger car safety. An obvious area for ANCAP action is new safety features. Many new features - including electronic stability control (ESC) and adaptive headlights - have been introduced into cars and are being touted as high technology new safety features.

ANCAP is examining the benefits of the following three methods to encourage manufacturers to provide these features and for new car buyers to specify them when making their purchase:

1. Promote the feature (similar to the last ANCAP release that promoted the benefits of ESC);
2. Include the feature in the existing star rating system through either additional points (eg: seat belt reminders are given additional points), or a barrier to entry into a 5 star rating (eg: vehicles require effective side impact head protection to receive 5 stars).

3. A separate rating system (similar to the ANCAP pedestrian rating).

The first step is to evaluate existing research to determine if a new safety feature actually provides a positive safety benefit. The feature considered the most likely benefit to vehicle safety in recent times is ESC. At a recent international vehicle safety conference - the 19th International Technical Conference on the Enhanced Safety of Vehicles (ESV) held in Washington - a number of technical papers were given on the benefits of ESC.

For example, representatives of Audi and Volkswagen\(^6\) presented a paper indicating that ESC in Audi and Volkswagen vehicles in Germany can “prevent 80% of all skidding accidents” and that “35% of all vehicle occupant fatalities could be prevented.”

Similarly, Swedish research\(^7\) also showed significant improvements in safety for an ESC equipped fleet;

“It was estimated that for Sweden, with a total of 500 vehicle related deaths annually, that 80-100 fatalities could be saved annually if all cars had ESC.”

The results of the papers presented at the ESV support previous research conducted in Europe, Japan and the USA. In an October 2004 news release, the US Insurance Institute for Highway Safety (IIHS)\(^8\) stated;

“Together these studies, including the Institute’s new one, indicate that widespread application of ESC in the vehicle fleet can be expected to afford a significant safety benefit. If all vehicles on US roads had ESC, we might avoid as many as 800,000 of the 2 million or so single-vehicle crashes that occur each year. About 14,000 fatal single-vehicle crashes occurred in 2003, which means there’s a potential to save more than 7,000 lives each year.

While each study has different estimates of the benefits of ESC due to the different fleet makeup and the traffic and environmental conditions of each country, the research has shown there are significant benefits of fitting ESC.
ANCAP has started to encourage the fitting of ESC by reporting the availability of ESC in vehicles included in ANCAP releases of crash test results such as the recent 4WD pole test release.

The ideal situation is to be able to report on the results of controlled laboratory style testing to an internationally recognised standard that evaluates the effectiveness of the ESC-vehicle combination. Unfortunately, such a test and evaluation system does not currently exist. The US National Highway Traffic Safety Administration (NHTSA) has a research program to develop a test to assess the effectiveness of ESC systems.

In the absence of such a test, ANCAP is examining all other options to encourage greater fitting of ESC to new Australian passenger vehicles.

Conclusion

Since conducting its first test program in 1993, ANCAP has been successful in encouraging improvements in occupant protection through crash testing new passenger cars and publishing the results. This has continued with its most recent program of pole crash testing passenger 4WDs to demonstrate the benefits of head protecting side airbags.

With the advancement in safety technology and proven effectiveness of some of the new significant safety technologies, such as ESC, ANCAP will continue to review and update its program to continue encouraging improvements in vehicle safety.

Footnotes

1. Volvo Safety Centre Director, Wheels magazine article Feb 04
3. Farmer, C; “Relationships of Frontal Offset Crash Test Results to Real-World Driver Fatality Rates”; IIHS, January 2004
5. ANCAP Press release, “Curtain airbags should be used for head protection in vehicle side impacts.” 1 June 2005 www.aaa.asn.au
This year’s federal Budget held few surprises for motorists, with the Government having already committed to funding the new land transport plan, AusLink, as well as additional projects during the 2004 election. In total, the Budget identifies more than $12 billion for road transport during the five year period 2004-05 to 2008-09.

The linking of the Budget with the five year Auslink investment plan is certainly a positive step forward in terms of transparency. This funding comes with an important caveat however. Many projects will not be funded unless the States and Territories sign bilateral agreements with the Government, which would include complying with industrial relations reforms. The decision to tie funding with industrial relations is a contentious one, and so far, only Victoria and South Australia have signed up.

The Government has reaffirmed its position on the fate of the $541.5 million on offer to the Victorian Government for the Scoresby Freeway (now ConnectEast), which is available provided the Victorians build the Freeway without tolls—which is unlikely. The RACV has called for the redirection of the $541.5 million to other urgent projects like the duplication of the Goulburn Valley Highway and Deer Park Bypass.

As Figure 2 shows, motorists will more than pay for investment in roads. Over the five years to 2008-09, petrol and diesel excise will generate $70.6 billion. In addition to excise, GST on fuel generates approximately $3 billion annually for the States and Territories. The Federal Government indicates that the States and Territories will continue to receive a GST windfall over the Guaranteed Minimum Amount (GMA), receiving a total gain in 2005-06 of around $1.5 billion.

The luxury car tax, which applies to new vehicles valued at more than $57,000, is projected to generate $310 million in 2005-06. AAA has argued for the removal of this tax on the basis that luxury cars often introduce advanced safety and ITS technologies, and because all cars are already subject to GST.

In terms of investment in road safety, the highly successful Federal Black Spot Program, which is not subject to bilateral agreements being signed, will be continued for another two years to 2007-08 at the current rate of $45 million per annum.

This $90 million extension will reportedly prevent more than 1,000 serious crashes. Given the outstanding success of this program, it is surprising the Government did not commit more

**Figure 1: Road Transport Funding 2004-05 to 2008-09 ($ Million)**

**Figure 2: Road Transport Funding and Fuel Excise 2004-05 to 2008-09 ($ Million)**

funds to it, as was recommended by the 2004 House of Representatives Inquiry into National Road Safety. The AAA has argued for a doubling of funding.

The Government will spend $8.8 million over four years to research better vehicle safety standards and administer the standards system. This is in addition to $1 million in 2004-05 to establish a trial driver education scheme for new provisional licence holders (since increased to $3 million). The motor vehicle industry (including the RACV) and the New South Wales and Victorian governments are also contributing to the trial.

The Roads to Recovery program has been extended to 2008-09, with an average investment of around $320 million per year. From 2005-06, $300 million of the annual Roads to Recovery funding will be allocated directly to local governments, with the majority of the remainder ($33.1 million in 2005-06) forming the AusLink Strategic Regional Program.

**Conclusion**

Overall, the Budget held few surprises for motorists; funding previous AusLink and election commitments is its focus. While the Government has promoted AusLink as a “massive increase” in investment for transport sector, saying “It is the equivalent of two Snowy Mountains Schemes” many, such as the Committee for Economic Development of Australia (CEDA), have argued that “There is a serious backlog in infrastructure investment ... which requires immediate attention.” As other papers in this edition of Motoring Directions argue, there appears to be a need to consider AusLink as just the first step in rebuilding the nation’s road transport infrastructure.

**Footnotes**

4 Committee for Economic Development of Australia (CEDA), 2005. Infrastructure: Getting on with the Job.
CEDA Report

Infrastructure: Getting on with the job

The Committee for Economic Development of Australia (CEDA) recently released a major report on the state of Australia’s infrastructure – Infrastructure: – Getting on With the Job – which notes that Australia’s infrastructure is at a crossroads after decades of under-investment.

Following are extracts from the CEDA report’s Executive Summary, and some sections on infrastructure investment.

The Report also contains a number of abstract papers from Dr John Uhr, Senior Research fellow in the Australian National University’s Research School of Social Sciences; Peter Taylor, Chief Executive of Engineers Australia; Dr Vince Fitzgerald, Chair of the Allen Consulting Group; and Tony Cole, former Secretary to the Treasury and currently National Practice Leader for Mercer Investment Consulting. These papers are accessible on the AAA website, www.aaa.asn.au

Executive Summary

Overview

• Much of Australia’s infrastructure is at a crossroads. Following two decades of under-investment vital elements of the nation’s infrastructure are in serious disrepair, if not crisis. Australia’s infrastructure – investment sunk in land, such as roads, railways, telecommunications, electric power, sea and air ports, and the like – is struggling to cope with the cumulative demands of Australia’s sustained period of economic growth and the vast new trade and investment opportunities emerging – particularly from China.

• There is a serious backlog in infrastructure investment, in water, energy, and land transport, estimated conservatively at $25 billion, which requires immediate attention.

• Institutional structures – those of Commonwealth, State and Local governments – which have served Australia well in decades past now appear unable, and ill-equipped, to grapple with the nation’s present infrastructure planning and delivery challenge. Yet in Australia’s private sector, management skills and technical expertise in infrastructure development and financing are world class. There is a mismatch between public and private sector capability.

• Fiscal policies of budget surpluses and debt reduction pursued over the last decade by governments in Australia have led to reduced public investment in infrastructure.

• Even with large increases in tax revenues and aggressive “dividend stripping” of government trading enterprises, the infrastructure investment required to meet Australia’s present and future needs has not materialised.

• Simultaneously, large capital resources are accumulating in the private sector, particularly in superannuation and managed funds, which could be increasingly tapped for infrastructure investment. Closing this circle – between infrastructure capital needs and private sector capital availability – should be a priority.

The decline in infrastructure investment

• Infrastructure investment began to decline in the 1980s as governments increased the share of public consumption expenditure in their budgets at the expense of public investment. Fiscal policies of budget surpluses and debt reduction have reinforced this decline.

• Government capital expenditure as a share of GDP, which was around 7.2% in the 1970s and early 1980s has now fallen to a low of 3.6% of GDP in 2003–04. Roads investment has fallen from 22% of GDP in the 1960s to 10%.

• Business leaders, politicians, professional economists, local governments, industry and community groups have increasingly expressed concern over the decline in Australia’s infrastructure investment and have stressed the need for action.
• Professional evaluation led by Engineers Australia has revealed the very serious problems now facing Australia. Rating on a scale of “A” to “D” the 13 sectors of ports, airports, telecommunications, electricity, national roads, potable water, gas, state roads, wastewater, local roads, storm water, irrigation and rail, revealed that no infrastructure class received an A, indicating it was sufficient for Australia’s current and future needs. Only four sectors achieved B ratings indicating a sufficiency to meet current needs but insufficient for the future, while the remaining nine sectors slipped into the C and D rankings.

• New economic modelling of overcoming Australia’s infrastructure backlog (but not of providing for future needs) in only five of the key sectors – electricity, gas, rail, roads and water – shows substantial economic benefits would accrue. GDP would increase by 0.8%, business investment by 1.2%, housing investment by 1.8%, and exports by 1.8%. Reduced costs – with CPI falling by 3.2% – and improved living standards of 0.4% would also flow from action to remedy this backlog in Australia’s infrastructure.

Government Involvement

• Governments have been the main providers of infrastructure in Australia and remain so in the roads, rail, ports, and water sectors and parts of the energy sector. Government administration and institutional structures continue to shape and influence infrastructure investment in spite of the trend to corporatisation, privatisation and increased private provision of infrastructure since the 1980s.

• Australia’s federal system of government imposes unique complexities and constraints on infrastructure investment compared with many other countries. Commonwealth–State financial relations have traditionally had a pivotal role in shaping infrastructure investment.

• Commonwealth–State relations changed markedly with the New Tax System in July 2000 and the States have enjoyed a buoyant new form of revenue in the GST. However, Specific Purpose Payments, which account for around 40% of payments to the States, continue to be important in defining Commonwealth–State relations and expenditure priorities.

• Various proposals for the overhaul of Commonwealth–State financial relations continue to be advanced and discussed, but progress is unpromising.

• In the important areas of roads, rail and intermodal facilities, the Commonwealth’s AusLink offer of $11.8 billion over 5 years made in June 2004 is still being negotiated with the States.

• The interplay of governments’ fiscal policies of budget surplus/debt reduction, vexatious Commonwealth–State financial relations, and political considerations present an apparently insurmountable obstacle to overcoming the backlog in Australia’s infrastructure – and in putting in place fresh institutional structures for effective strategies leading to prompt infrastructure provision.

Getting on with the job

• Our emerging infrastructure backlog and deficient capability warrants immediate attention if Australia is to build upon, and secure, its already impressive record of sustained economic growth and productivity gains.

• The first task is to overcome the highly visible and well documented backlog in existing infrastructure.

• The second task is to establish new, forward looking, and resilient institutional frameworks to facilitate timely infrastructure investment by integrating the full range of strategic planning, management and technical expertise in Australia’s public and private sectors.

Over the last decade, the Commonwealth, State and Local government public sectors have been reduced considerably in size. This has resulted in a corresponding decrease in the number of specialists (including engineers) within the public sector. The loss of technical expertise in Australian governments increases the risk that infrastructure contracts will not achieve government or taxpayer expectations.

Peter Taylor
Chief Executive
Engineers Australia
The Importance of Infrastructure Investment

Many commentators have also recently voiced their concern over the decline in infrastructure investment\(^1\). For example, according to HSBC Chief Economist John Edwards: “…in 1965 (the year in which spending on government infrastructure hit 7 per cent of GDP), total private investment was barely more than double that, at 15 per cent. But by 2003–04, when spending on infrastructure had dropped to 4 per cent of GDP, the private investment figure had jumped to 21 per cent… although we are in one of the biggest investment booms in Australian history, the public sector share of it is almost insignificant compared to our typical experience. The public sector now accounts for 16 per cent of total investment: in 1964–65 it accounted for a third.”\(^2\) The former Reserve Bank Governor and Secretary to the Treasury, Bernie Fraser, is more direct. He has said “…You only have to look at the age of some of the infrastructure and it is crying out for replacement. A lot of it is very ancient – water and sewerage in particular.”\(^3\)

While the downgrading of infrastructure investment in public policy and the upgrading of public consumption expenditure may have had obvious short term electoral and fiscal policy attractions, and indeed may have reflected the view in some quarters that Australia had invested excessively in public infrastructure in the 150 years of its “development era”, there remains now a clear backlog – and consequent economic cost – due to under-investment in infrastructure investment over recent decades. For example, in the key infrastructure asset class of roads, research has shown that, while the net road stock has increased since 1960 it has nevertheless declined as a proportion of GDP, from about 22 per cent then to a little over 10 per cent in 2002 (See Table – Net Road Stock in Australia, on previous page). The need for greater investment in roads is also supported by other evidence, such as rising congestion costs (AAA/Allen 2003, P4).

The physical infrastructure of roads and bridges is among the most urgent of necessities. But financial infrastructure is no less important, and that of course depends increasingly on communications infrastructure. All in turn draw on, and also impact, on the social infrastructure, which is an area where many of the civil society aid-providers identify their greatest challenge. Government has roles in each of these forms of infrastructure, more as manager and regulator than as provider, protecting “the public interest” against the predictably narrower interests of many infrastructure providers.

Dr John Uhr,
Senior Research Fellow
ANU School of Social Sciences

**NET ROAD STOCK IN AUSTRALIA**

<table>
<thead>
<tr>
<th>Year</th>
<th>Value (million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>10000</td>
</tr>
<tr>
<td>1965</td>
<td>15000</td>
</tr>
<tr>
<td>1970</td>
<td>20000</td>
</tr>
<tr>
<td>1975</td>
<td>25000</td>
</tr>
<tr>
<td>1980</td>
<td>30000</td>
</tr>
<tr>
<td>1985</td>
<td>35000</td>
</tr>
<tr>
<td>1990</td>
<td>40000</td>
</tr>
<tr>
<td>1995</td>
<td>45000</td>
</tr>
<tr>
<td>2000</td>
<td>50000</td>
</tr>
</tbody>
</table>


**NET ROAD STOCK IN AUSTRALIA**

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage of GDP (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>25</td>
</tr>
<tr>
<td>1965</td>
<td>20</td>
</tr>
<tr>
<td>1970</td>
<td>15</td>
</tr>
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<td>1975</td>
<td>10</td>
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<td>1980</td>
<td>8</td>
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<tr>
<td>1985</td>
<td>6</td>
</tr>
<tr>
<td>1990</td>
<td>4</td>
</tr>
<tr>
<td>1995</td>
<td>2</td>
</tr>
<tr>
<td>2000</td>
<td>1</td>
</tr>
</tbody>
</table>

This backlog, confirmed in rigorous technical evaluation led by Engineers Australia and reported in its Australian Infrastructure Report Card 2001, is now a serious economic problem (EA 2001). Australia will need to address this infrastructure crisis if it is to retain its leading position in the world economic growth league, and position itself for sustained economic growth and international competitiveness in the first decade of the 21st century.

The significant cost of road crashes is another argument for additional road investment. According to the Bureau of Transport Economics, road crashes waste $15 billion every year in vehicle repairs, lost labour and lost productivity, quality of life, travel delays, insurance, legal and other costs.

It has been estimated that nearly half the reduction in the road toll can be achieved by improving roads. The associated reduction in trauma would place less pressure on Government health and welfare budgets.

**ANNUAL COSTS OF ROAD CRASHES ($M)**

![Annual Costs of Road Crashes](chart)

*Source: Road Crash Costs in Australia, BTE Report 102, 2000*

**Footnotes**

1. For example, Australian Financial Review (AFR), 24 September 2004, *Push to upgrade ancient road, rail and water services*; (AFR) 23–24 October 2004; *Why Australia will sweat this summer. A spendthrift nation lives it up as the power goes off and the water dries up*; 30 November 2004; *Sustaining Strong Economic Growth*; address to CEDA by Graham Kraehe, Chairman, National Australia Bank; *Big Country Little Vision*, (AFR) 3–4 December 2004, p24,25.

2. AFR (op cit), 3–4 December, 2004; p25.

Latest AAA/ANOP Survey

Road Rage, Safer Roads on Motorists’ Minds

Australian motorists are increasingly concerned about the aggressive behaviour and attitude of other motorists on the road, according to the most recent round of research conducted by ANOP on behalf of the Australian Automobile Association and Australia’s motoring organisations.

Despite this increase in concern about driver behaviour, the latest research also shows a heightened awareness of safer roads and infrastructure.

The ANOP research is the eighth in a series undertaken for the AAA since 1995 and covers a wide range of issues affecting Australian motorists, including:

• petrol pricing and taxation,
• roads and infrastructure spending,
• road safety and drivers attitudes,
• environmental concerns, and
• new vehicle advertising.

This is the eighth national survey of motorists’ views undertaken by ANOP for the AAA over the past decade. Previous studies have been in 1995, 1996, 1997, 1999, 2000, 2003 and 2004.

The 2005 national survey of motorists consisted of 768 telephone interviews. Those interviewed were regular drivers aged 18 years and over who had participated in the July 2004 SaferRoads survey.

The main findings of the February 2005 national survey follow:

Motorists’ Agenda

Motorists’ unprompted identification of the main issues impacting on them as car drivers continues to provide a broader insight into trends in Australian society. As found in 2003, motorists’ primary concern is the behaviour and attitudes of other drivers - especially their perceived aggression and impatience. This concern has risen significantly over the past five years, and is an indication of how social pressures are impacting on standards of courtesy on the road and resulting in a more impatient and selfish mindset among drivers.

While motorists are increasingly displaying irritation with “other” drivers, they are also starting to focus more on the condition and safety of roads and on safety and road accidents. The increases in concern about these issues in 2005 are important as they show that the SaferRoads Campaign is beginning to strike a chord among motorists.

With concerns about “other” drivers’ behaviour, roads and safety increasing, motoring costs has softened as an issue. The reason for this has been the dramatic increase in the use of the supermarket docket to help defray petrol costs. While the marketing success of supermarket fuel discounts has readjusted motorists’ price sensitivity, this does not mean that petrol prices will remain a benign issue.
The 2005 survey continues to show the integral part that the car plays in meeting Australians’ mobility needs, and the high level of importance that Australians attach to their cars. Nine in ten continue to rate their car as important and to drive every or most days, with slightly higher dependence on the car evident in regional areas.

**Petrol Issues**

Ethanol in petrol continues to be a nebulous issue to the majority of motorists. Only one in four is currently happy to buy petrol containing ethanol, while nearly six in ten either reject it out of hand or have reservations about buying it - and a further two in ten are just undecided. As found previously, the main doubts motorists have about ethanol relate to concerns about potential engine damage and there is a distinct needs for more information. Substantial marketing will clearly be required to obtain community acceptance of ethanol in petrol.

**Causes & Prevention of Crashes**

Drivers continue to be the main culprit in the community's perceptions of the causes of crashes. Nearly all motorists surveyed spontaneously mention at least one aspect of driver misbehaviour when asked what causes crashes, clearly reflecting the messages conveyed by government road safety campaigns over many years.

*Speed* remains the primary spontaneously perceived cause of crashes, with *drink driving* and *lack of skills & inexperience* next on the list. References to *drink driving* have fallen, reflecting a cyclic low in drink driving “blitzes” at the time of the survey. In contrast to this decline, there has been a marked increase in the proportion of motorists nominating *lack of skills & inexperience* as a cause of road accidents – reflecting recent mainstream media coverage of young drivers and their apparent over-representation in accident statistics.

Fatigue, *driver attitudes and inattention* continue to be mentioned as causes of crashes further down the list, together with *roads*. However, mentions of roads have increased this survey in another indication that the voice of the SaferRoads Campaign is starting to be heard within the community.

In another encouraging result for the SaferRoads Campaign, the perceived importance of *better roads and safer cars* in reducing deaths and injuries has risen, as has the perceived importance of roads and cars as factors contributing to crashes.

**Roads & Infrastructure Spending**

When motorists are asked whether roads are as good as they should be, a different pattern of responses emerges for different roads. *Roads in their local area* are the roads that motorists drive on most frequently, and they receive the least favourable assessment. Just under six in ten say that roads in their local area are not good enough - rising to nearly seven in ten in regional areas. The main problem cited in most cases is poor upkeep and Surfacing, followed by concerns about road design and safety aspects.

Nearly five in ten motorists say *major highways* “should be better” with the main concerns about highways being the perceived need for more lanes, poor maintenance, followed by a call for more divided highways.
Motorists in regional areas are considerably less happy with their local roads and also with highways, whereas arterial roads are marginally more of an issue in urban areas.

Motorists’ attitudes to toll roads clearly show their reluctance to pay for new or better roads and reveal their belief that governments rather than motorists should pay. In line with this - and reflecting their belief that many roads should be better - nearly three in four motorists believe that the Federal government should be spending more on infrastructure (like roads and transport improvements) rather than maintaining the current substantial surplus. These results are a clear indication of the potential to engage the community in the infrastructure debate.

**New Cars & Advertising**

ANOP’s 2004 SaferRoads survey found that motorists’ awareness and understanding of advances in car safety had increased significantly. The 2005 survey shows that the perceived importance of safer cars in preventing deaths and injuries has also increased.

The 2005 survey reveals that nearly one in two motorists have concerns about new car advertising, with the great majority of the concerns relating to the perceived emphasis on speed and encouragement of speeding, particularly among young people. Thus, these concerns also tap into motorists’ strong belief that speed is a primary cause of crashes.

Attitudes are clearly related to age, with older motorists considerably more concerned about this issue than younger motorists.

**Environmental Concerns**

For the first time in ANOP’s surveys for the AAA, motorists’ concern about the car’s environmental impact has increased rather than fallen.

When motorists are asked to nominate, unprompted, their “realistic” solutions for reducing the impact that cars have on the environment, it is clear that the community’s faith remains in new fuels and new types of cars - rather than in solutions that reduce car usage such as better public transport or encouraging people to drive less.

There has been a significant increase in the number of motorists nominating the development of cleaner, alternative fuels and alternative cars as possible solutions to reducing cars’ environmental impact. Thus, the Australian community’s desire for different sorts of cars driven by different sorts of fuels and technologies, is increasing as its environmental consciousness is rekindled.
A majority of Australian motorists would oppose any moves to lower speed limits from 60km/h to 50km/h on main roads, according to research undertaken by the McGregor Tan Research Group on behalf of four motoring clubs, with increased travelling time a major factor in their concern.

Most motorists also felt the level of tolerance for speeding drivers should be 65km/h in a 60km/h zone, with others saying the tolerance should be 10km/h.

And proving that Australians do rely on their cars, the majority of drivers in all States surveyed drove between 50k and 300k a week.

The survey was commissioned by the RAA, RACWA, RACQ and NRMA and will be used in the development of public policy by the Clubs.

The results of the survey follow:

**Individual trips per week**

In order to ascertain how often people were actually travelling on the road, respondents were asked to indicate how many individual trips they personally drove each week.

One “trip” was classified as putting the keys in the ignition to take a journey and then pulling them out of the ignition.

The results by the Australian States surveyed are shown in the table below:

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 to 10 trips</td>
<td>25</td>
<td>31</td>
<td>24</td>
<td>22</td>
</tr>
<tr>
<td>11 to 20 trips</td>
<td>41</td>
<td>37</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>21 to 30 trips</td>
<td>16</td>
<td>16</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>31 to 40 trips</td>
<td>7</td>
<td>8</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>41 to 50 trips</td>
<td>5</td>
<td>4</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>More than 50 trips</td>
<td>5</td>
<td>5</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

**Kilometres driven each week**

All respondents were asked how many kilometres they drive each week. The results by the Australian States surveyed are shown in the table below:

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 50km</td>
<td>13</td>
<td>15</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>50km to &lt;100km</td>
<td>25</td>
<td>21</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>100km to &lt;200km</td>
<td>21</td>
<td>25</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>200km to &lt;300km</td>
<td>14</td>
<td>15</td>
<td>19</td>
<td>13</td>
</tr>
<tr>
<td>300km to &lt;400km</td>
<td>12</td>
<td>8</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>400km to &lt;500km</td>
<td>7</td>
<td>6</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>More than 500km</td>
<td>8</td>
<td>9</td>
<td>12</td>
<td>11</td>
</tr>
</tbody>
</table>

**Support for existing speed to be reduced to 50km/h**

Support for reducing the existing 60km/h speed limit to 50km/h on main roads was low, with the majority of respondents in every Australian State surveyed stating that they would oppose such a change.
It was clear that those who opposed such a speed reduction on main roads were firm in their stance, with more than half from every State surveyed indicating they would strongly oppose such a speed reduction:

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly support</td>
<td>12</td>
<td>14</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>Slightly support</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Neither/ would not affect me</td>
<td>5</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Slightly opposed</td>
<td>15</td>
<td>12</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Strongly oppose</td>
<td>61</td>
<td>61</td>
<td>56</td>
<td>65</td>
</tr>
</tbody>
</table>

**Extra travel time**

When respondents were asked how they would feel about the extra travel time resulting from reducing speed limits from the existing 60 km/h to 50 km/h, at least half surveyed from each Australian State indicated that they would be concerned:

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very concerned</td>
<td>34</td>
<td>32</td>
<td>27</td>
<td>30</td>
</tr>
<tr>
<td>Concerned</td>
<td>23</td>
<td>21</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>Not at all concerned</td>
<td>43</td>
<td>46</td>
<td>50</td>
<td>45</td>
</tr>
<tr>
<td>Don’t know/ can’t comment</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

**Speed generally travelled when traffic flowing well**

It is positive to find that the highest proportion of Australian drivers surveyed generally drive at 60 kilometres per hour on main roads with a 60 km/h speed limit and when the traffic is flowing well, as outlined in the table below:

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>50km/h</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>51km/h</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>52km/h</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>53km/h</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>54km/h</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>55km/h</td>
<td>2</td>
<td>6</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>56km/h</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>57km/h</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>58km/h</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>59km/h</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>60km/h</td>
<td>62</td>
<td>61</td>
<td>71</td>
<td>59</td>
</tr>
<tr>
<td>61km/h</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>62km/h</td>
<td>4</td>
<td>5</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>63km/h</td>
<td>4</td>
<td>5</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>64km/h</td>
<td>1</td>
<td>2</td>
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<td>0</td>
</tr>
<tr>
<td>65km/h</td>
<td>14</td>
<td>6</td>
<td>9</td>
<td>15</td>
</tr>
<tr>
<td>66km/h</td>
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<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>67km/h</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>68km/h</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>69km/h</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>70km/h</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

**Tolerance before speeding drivers should be fined, when travelling in a 60 km/h zone**

The highest proportion of survey participants from Australian States felt that 65 km/h would be the appropriate speed at which to be fined when driving in a 60 km/h speed limit zone:

<table>
<thead>
<tr>
<th>% OF RESPONDENTS</th>
<th>NSW</th>
<th>SA</th>
<th>QLD</th>
<th>WA</th>
</tr>
</thead>
<tbody>
<tr>
<td>61km/h</td>
<td>7</td>
<td>7</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>62km/h</td>
<td>1</td>
<td>4</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>63km/h</td>
<td>2</td>
<td>6</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>64km/h</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>65km/h</td>
<td>30</td>
<td>38</td>
<td>34</td>
<td>45</td>
</tr>
<tr>
<td>66km/h</td>
<td>10</td>
<td>7</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>67km/h</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>68km/h</td>
<td>4</td>
<td>5</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>69km/h</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>70km/h</td>
<td>28</td>
<td>20</td>
<td>26</td>
<td>14</td>
</tr>
<tr>
<td>71km/h</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>72km/h</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>73km/h</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>74km/h</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>75km/h</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>80km/h</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>
NATIONAL ROAD SAFETY STRATEGY: AUSTRALIAN COMPARISON OF PERFORMANCE AGAINST TARGET
(fatalities per 100,000 population, to May 2005)

Source: ATSB, Fatal Road Crash Database

AVERAGE CAPITAL CITY UNLEADED PETROL PRICE
(price per quarter to May 2005)
DRIVER AND VEHICLE TRENDS

Source: Austroads, RoadFacts 2005

VEHICLE OPERATING COSTS

The Role of the AAA

AAA will pursue its Vision and Mission by:
• Research, development and advocating policy and technical improvements in motoring.
• Facilitating and supporting the continuing success and development of motoring and related activities of its constituent members, providing opportunities for discussion and collaboration to realise effective synergies.
• Maintaining and facilitating contacts between constituents and like organisations nationally and internationally.

The AAA Vision

To promote responsible, safe, affordable motoring and assistance services nationally for its collective membership.

The AAA Mission

• To provide a strong, effective and collective voice for the Australian motoring community.
• To facilitate and support continuing success and development of the motoring and related activities of its constituent members.

Constituent Members

National Roads and Motorists’ Association Limited
Royal Automobile Club of Victoria Limited
Royal Automobile Club of Queensland Limited
Royal Automobile Association of South Australia Incorporated
Royal Automobile Club of Western Australia Incorporated
Royal Automobile Club of Tasmania Limited
Automobile Association of Northern Territory Incorporated
Royal Automobile Club of Australia

The views expressed in Motoring Directions are not necessarily those of the AAA.