

**Institute of Transport and Logistics Studies (ITLS)
Transport Opinion Survey (TOPS)**

Quarter 1, March 2019

Highlights

Infrastructure and transport increase as the highest priority national issue

- In the March 2019 quarter, 19% of Australians nominated infrastructure as one of the two highest priority issues in Australia today, slightly up from 17% in March 2018. In the March 2019 quarter, 10% of Australians nominated transport as one of the two highest priority issues in Australia today, slightly up from 9% in March 2018.

Public transport the highest priority for transport

- In the March 2019 quarter, 31% of Australians said that the highest priority issue for transport in Australia is public transport improvements, down from 38% in March 2018. This is followed by other issues (27%) and road improvements (21%).

Transport not changed in local areas

- In the March 2019 quarter, 59% of Australians said that transport in their local areas is the same now as one year ago, slightly up from 55% in the March 2018 quarter.

Higher level of confidence about local transport in the short-term

- In the March 2019 quarter, 14% of Australians said that transport in their local area will be better in one year's time, slightly up from 12% in the March 2019 quarter.

Higher level of confidence about transport in Australia in the short-term

- In the March 2019 quarter, 17% of Australians think that transport in Australia will be better in one year's time, slightly up from 15% in the March 2018 quarter.

Australians more confident about transport in Australia in the longer-term

- In the March 2019 quarter, 30% of Australians think that transport in Australia will be better in five years, the same as in the March 2018 quarter and down from 34% in the September 2018.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, in March 2019 Australians are less confident about transport in their local area (Confidence index: down from 100 to 78), and across Australia in one-year time (Confidence index: down from 100 to 75), and in five years (Confidence index: down from 100 to 77).

Only 10% Australians travel with 40% or more of the time for work-related purposes. Australians travel less for business purposes.

- One in ten Australians said that their work-related travelling is 40% or greater of the total time. About six out of ten Australian respondents revealed that they have never travelled for business purposes.

Private car users account for eight in ten of transport users, followed by bus and local suburban train user. Ride-share becomes slightly more popular than taxi

- 82% of Australians use private car, followed by bus and metropolitan train/tram with 36% and 33%, respectively. Ride share such as Uber, Lyft slightly exceeds taxi among Australians.

About the Transport Opinion Survey

The Transport Opinion Survey is a biannual survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews were conducted by telephone by Taverner Research using trained interviewers until the September 2013 quarter. The survey methodology was changed to an online survey from the March 2014 quarter, using an online panel.

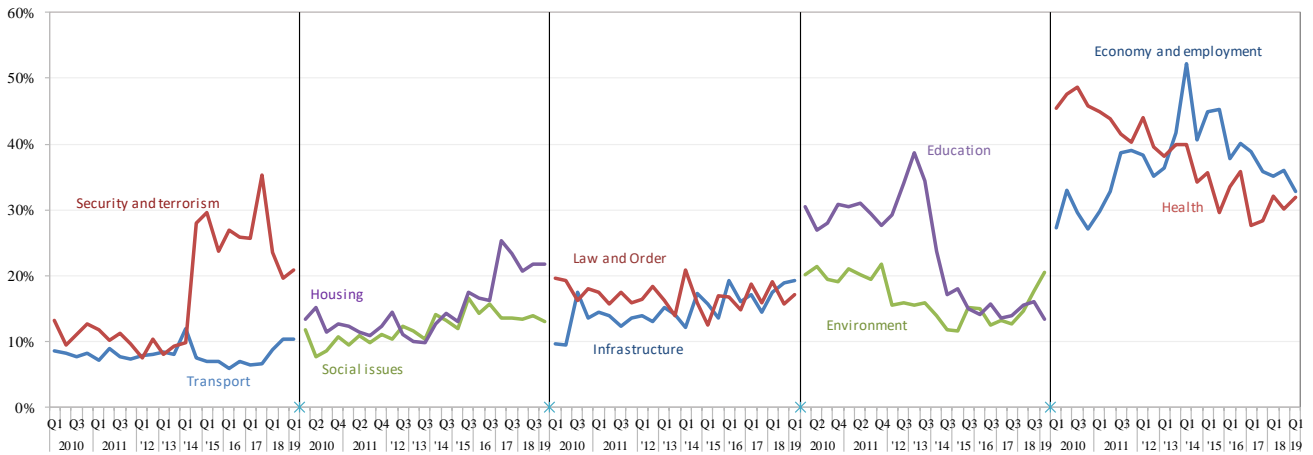
The Quarter 1, March 2019 survey was conducted between 21 February and 5 March 2019. This is the fifth wave of the longitudinal panel survey launched in March 2015. This report is based on the data from 1493 completed responses, including 942 repeated samples from the last Wave and 551 fresh samples. Current issues in this quarter included asking Australian residents which percentage of the time they travel for work-related purposes if they use domestic train and air travel. The respondents were also asked over the last month which transport services they have used.

Transport as a national priority

Which two of these issues do you think are the highest priority in Australia today?

- In the first quarter (Q1) of 2019, the economy and employment continued to show up as the highest priority issue in Australia, nominated by 33% of Australians, followed by health (32%). Australians were concerned and well informed about housing (22%), followed by security and terrorism as well as environment with 21% each of the two issues, which continued to be nominated among two top priority issues in Australia by many respondents in this quarter.
- 19% of Australians nominated infrastructure and 10% nominated transport as one of the two highest priority issues in Australia today.

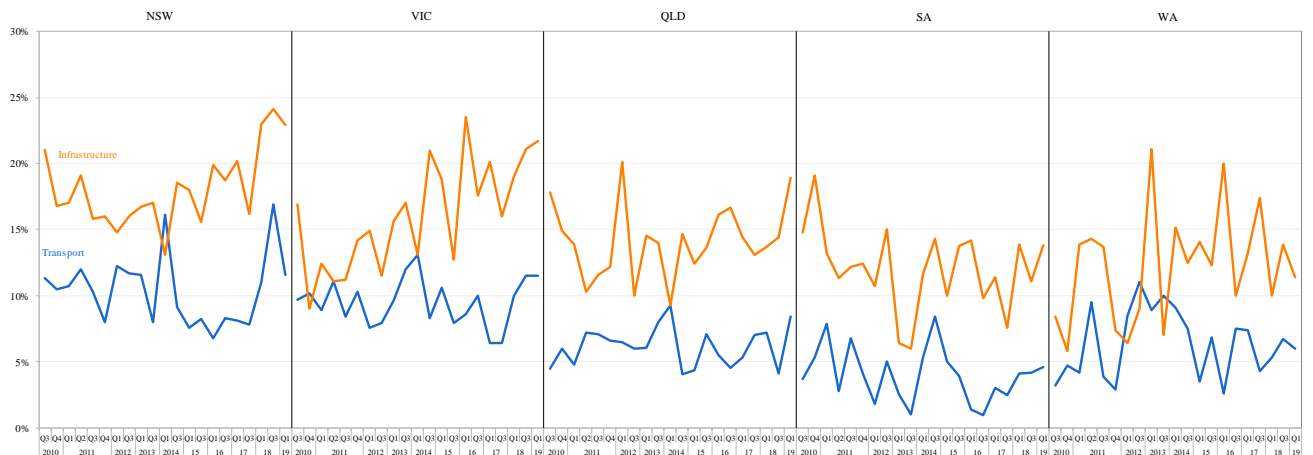
Issues selected as one of the top 2 priority issues in Australia, 2010 Q1 - 2019 Q1



Note: percentages add up to 200% in each quarter as each respondent was asked to nominate two highest priority issues.

The priority of transport and infrastructure at the national level is regarded differently by residents in different states. In Quarter 1 of 2019, 12% of New South Wales and Victorian residents nominated transport as a priority as compared to 5% of South Australian residents. There is a decrease in percentage of NSW residents nominating transport as one of Australian priority compared to September 2018 (12% as opposed to 17%), whereas an increase in Queensland respondents nominating this issue (8% as opposed to 4%).

Transport and infrastructure as highest priority issues by state, 2010 Q3 - 2019 Q1

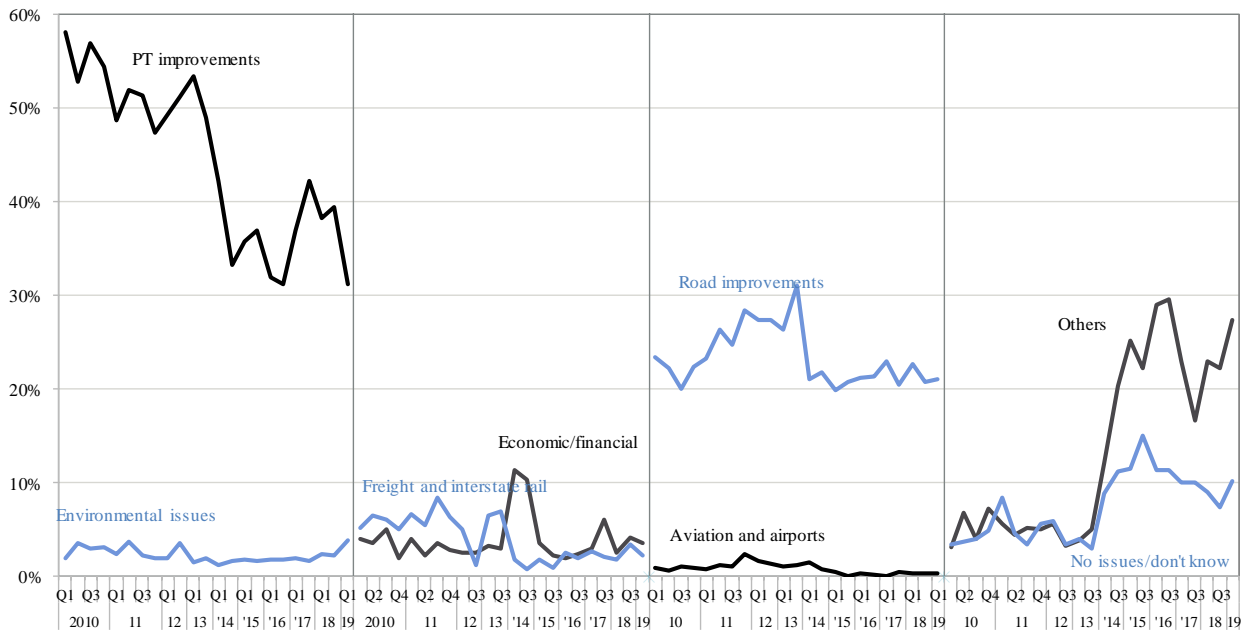


1. Highest priority issue for transport

What do you think is the highest priority issue for transport in Australia now?

- In the March 2019 quarter, 31% of Australians said that the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue since the beginning of this survey in 2010. 27% of Australians nominated other issues, such as security and terrorism and safety issues associated with the transport system, as the second highest priority issues for transport in Australia, followed by road improvements (21%).

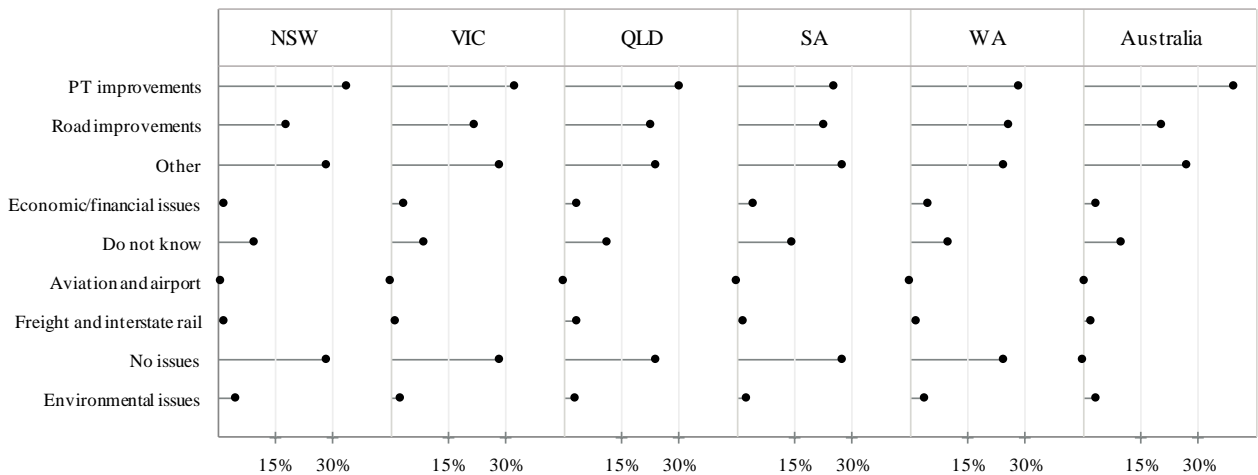
Highest priority transport issue in Australia, 2010 Q1 - 2019 Q1



Note: percentages add up to 100% in each quarter. "Other" includes responses about transport in general, responses about both public transport and roads, issues not included in other categories such as terrorism, and rebuilding transport after disasters.

- In the March 2019 quarter, all states regarded public transport improvements as the highest priority issue in transport. The second highest priority is other issues in most of states, except Western Australia, while road improvements is the third highest priority.

Highest priority transport issue by state, 2019 Q1

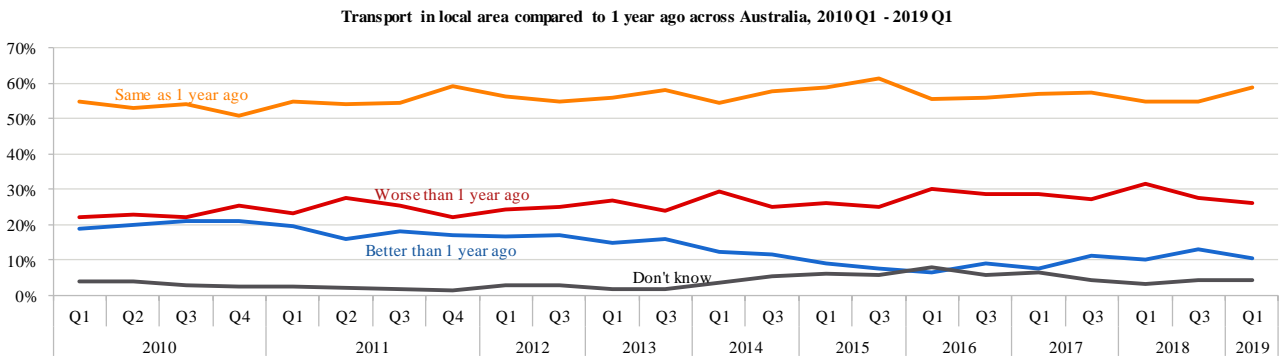


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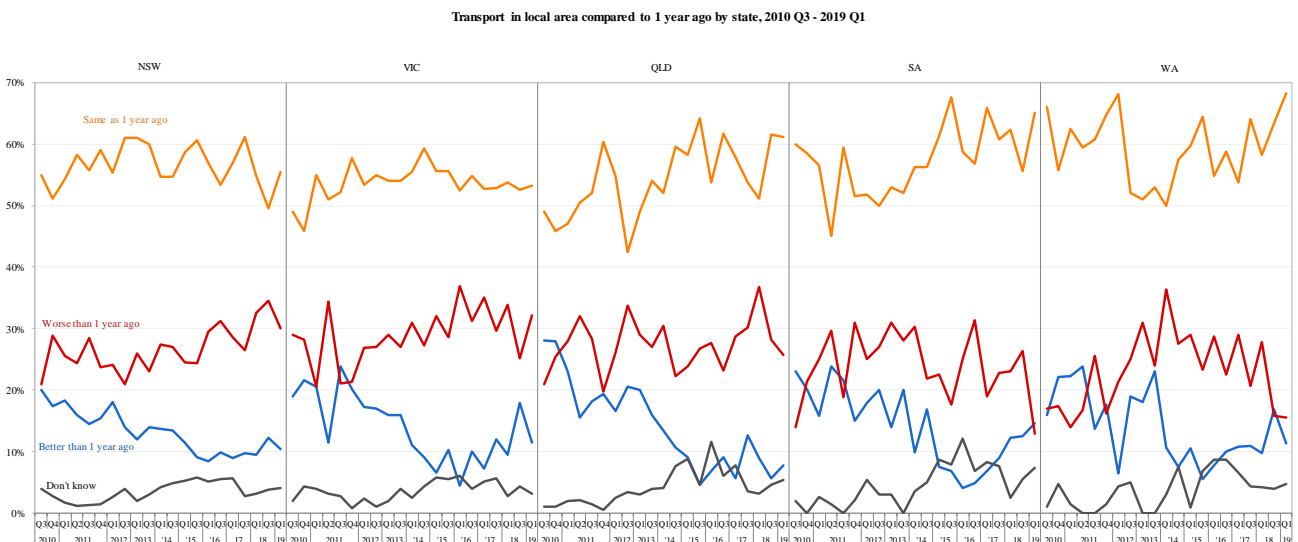
2. Local transport does not change

Compared to 1 year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?

- In the first quarter of 2019, only 11% of Australians believed that transport in their local areas is better now than one year ago, while 59% of Australians said it is the same as one year ago, and 26% of Australian said it is worse now than one year ago.



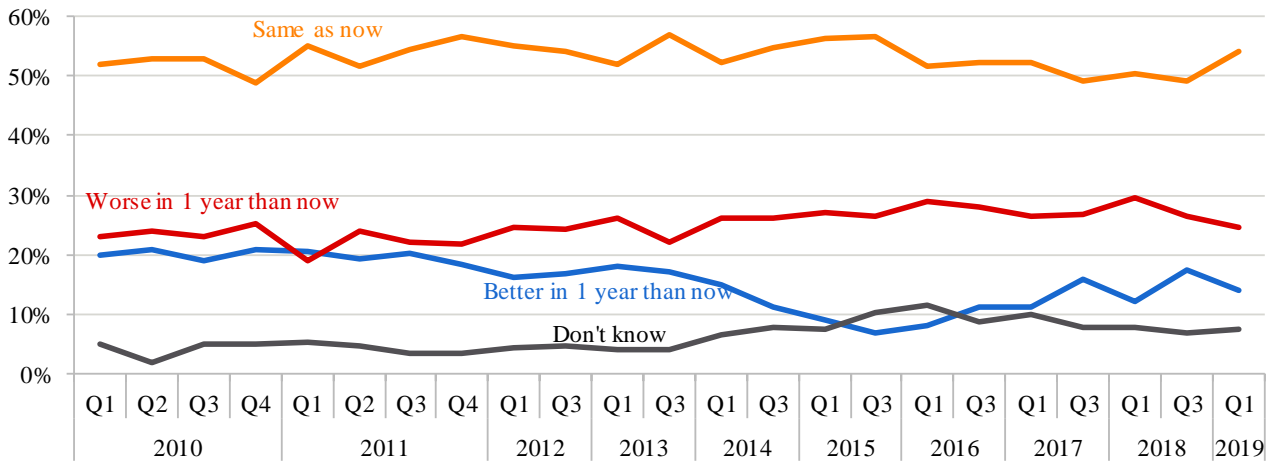
- The evaluation of transport in the local area by respondents is relatively consistent across all states of Australia, with most respondents identifying it as the same as one year ago. Compared with the last quarter, there is an decrease in most of states in the percentage of residents responding that transport in their local area is better now than one year ago, except Queensland and South Australia. However, the proportion of residents thinking that transport becomes worse in their local area also decreases in four out of five states, except Victoria increasing for this category.



Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

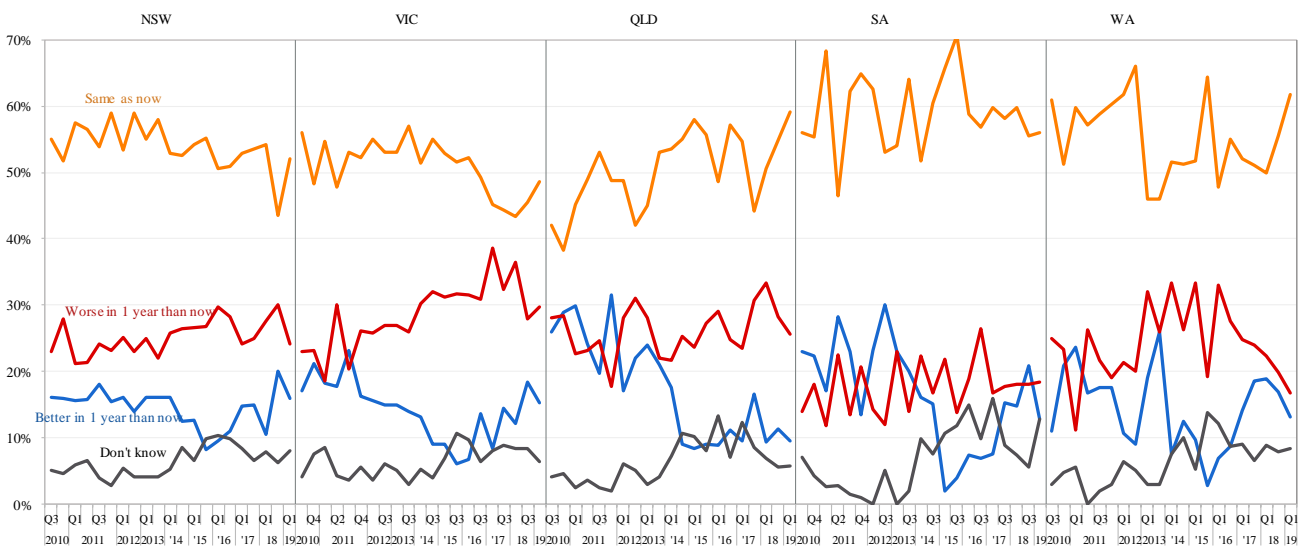
- In the March 2019 quarter, 54% of Australians said that transport in their local area will be the same in one year's time. 14% said transport will be better, slightly up from 12% in the March 2018 while 24% said transport will be worse, down from 30% in the first quarter of 2018.

Transport in local area in 1 year time across Australia, 2010 Q1 - 2019 Q1



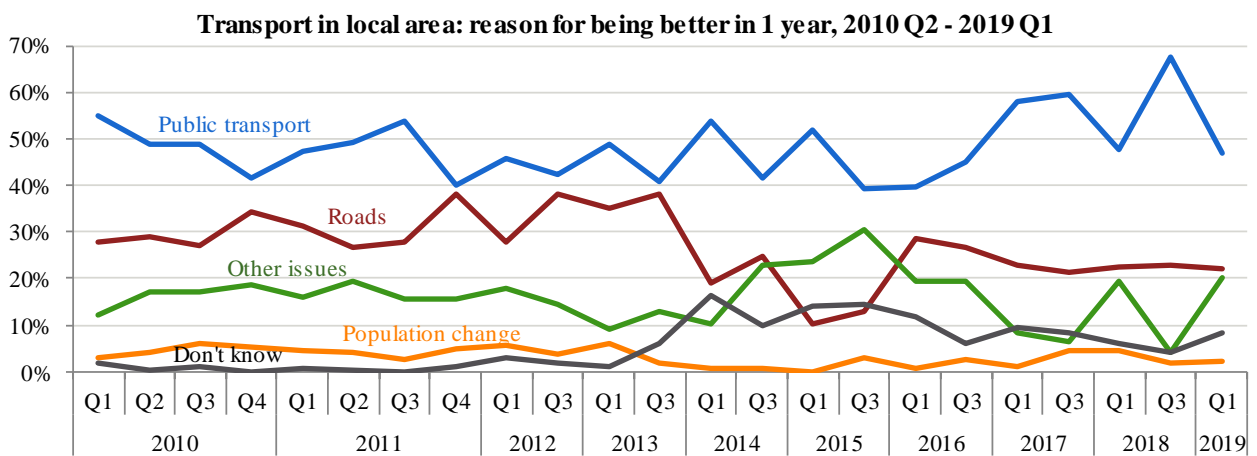
- 16% of New South Wales residents believed that transport in their local area will be better in one year's time; while 30% of Victorian residents believed that transport in their local area will be worse in one year's time. The majority of residents across all states believed that transport in their local area will be the same in one year as now.

Transport in local area in 1 year time by state, 2010 Q3 - 2019 Q1

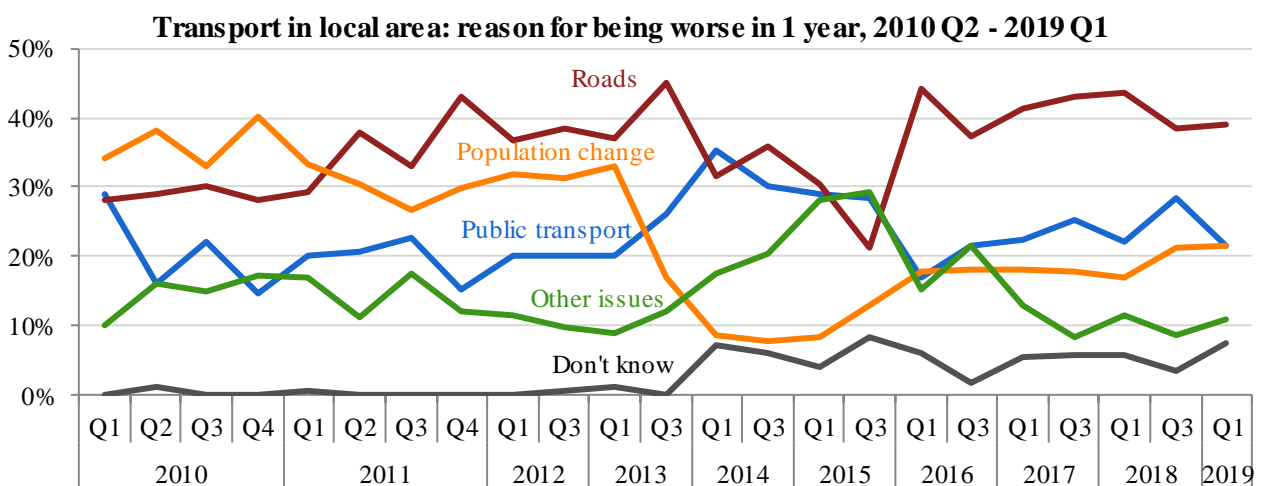


What were you thinking of most when answering that question [about transport in your local area in 1 year's time?]

- Public transport services are the main reasons for residents to believe that their local transport will be better (top figure) in one year, while roads are the main reasons for residents to believe that their local transport will be worse (bottom figure) in one year. Public transport significantly decreased as the main reason for Australians to believe the transport becomes better in their local while roads slightly increased as the remarkable reason to think their local transport gets worse, as compared to last year. In addition to public transport and roads, population change slightly increased as one of the main reasons for residents to believe that their local transport will be better in one year while it grew as main reasons to believe that their local transport will be worse in one year. The other issues, including economic and financial issues, government role in transport, and environmental issues, increased as main reasons for local transport being both better or worse.



Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.



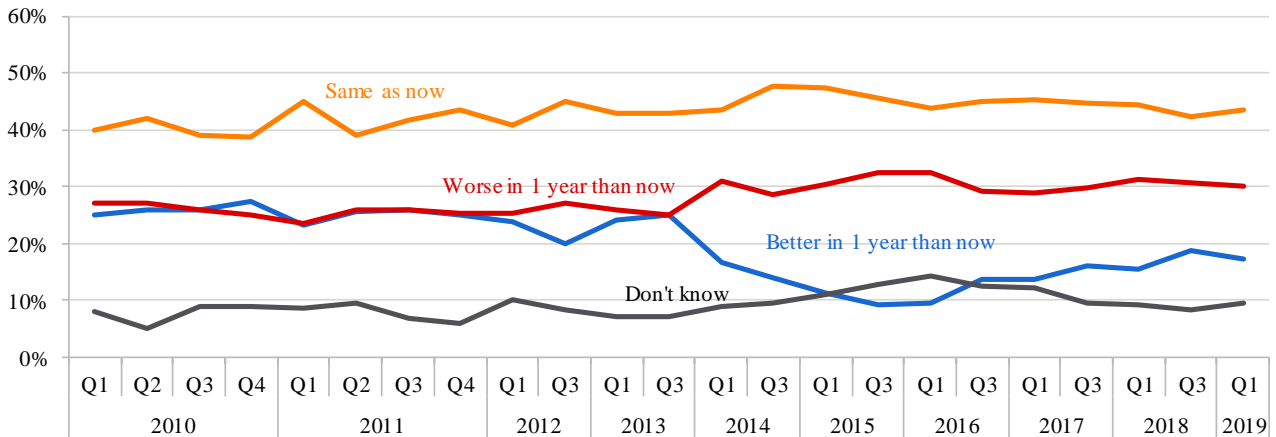
Note: Other includes issues relating to transport in general, both public transport and roads, economic and financial issues, government role and issues not included in public transport, road and population change categories.

3. Confidence about transport is growing in Australia

Do you think that in 1 year's time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

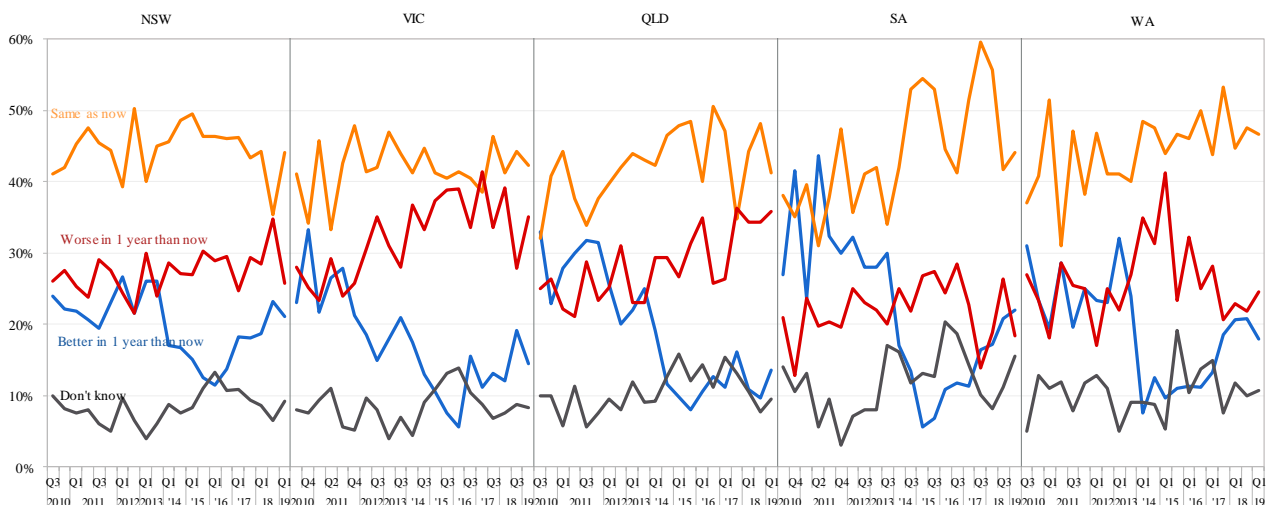
- In the March 2019 quarter, 43% of Australians said that transport in Australia in one year will be the same as now, with 17% of Australians saying that transport in Australia will be better in one year's time, slightly up from 15% in the same quarter last year.

Transport in Australia in 1 year, 2010 Q1 - 2019 Q1



- In the March 2019 quarter, about 36% of Queensland residents and 35% of Victorian residents said that transport in Australia will be worse in one year, and around 14% of these two states said that it will be better. South Australian residents are relatively more confident about transport in Australia in one year's time, as compared to other states, with 22% of their residents believing that transport in Australia will be better in one year's time and 18% of the residents thinking that Australian transport will be worse in one year's time.

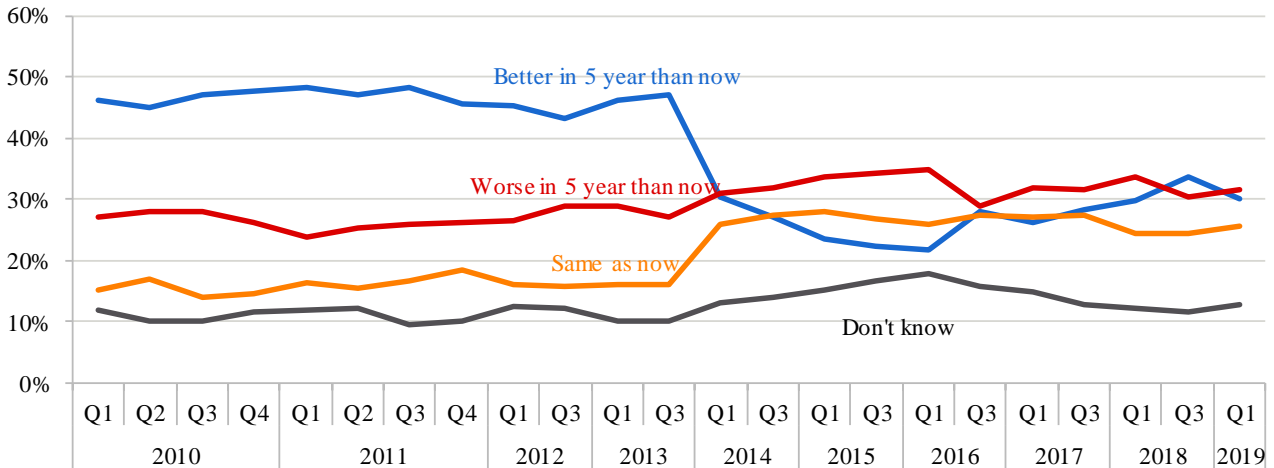
Transport in Australia in 1 year time by state, 2010 Q3 - 2019 Q1



Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

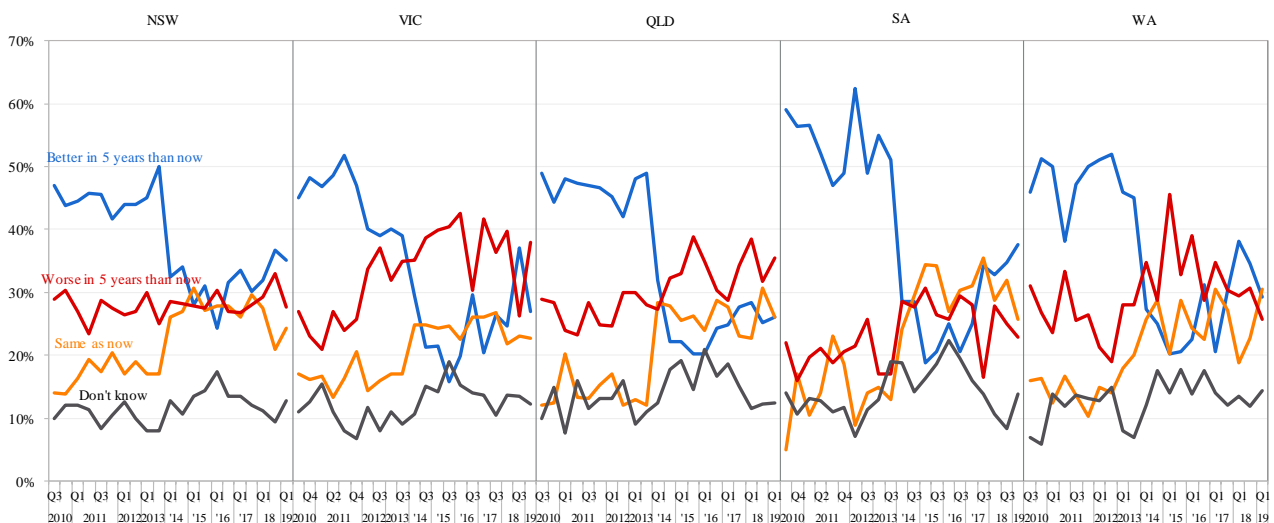
- Australians are slightly gaining confidence that transport will be better in five years than it is now. In the March 2019 quarter, 30% of Australian residents believed transport in Australia will be better in five years, the same as in the March 2018 quarter. In contrast, more people believed that transport in Australia will get worse in five years' time compared to the March 2018.

Transport in Australia in 5 years, 2010 Q1 - 2019 Q1



- In the March 2019 quarter, 38% of South Australian residents believed that that transport in Australia will be better in five years time compared to now, more confident than people living in the other states. In contrast, people living in Queensland are least confident, where 26% respondents said that transport in Australia will be better and 35% of their residents thought that Australian transport will be worse in five years' time.

Transport in Australia in 5 years by state, 2010 Q3 - 2019 Q1



4. Change in confidence over time – TOPS Index

Responses from the first Transport Opinion Survey about transport getting better or worse are used to set an index of 100 in quarter 1, March 2010. In each quarter, changes in community confidence about transport in the local area, transport in Australia in one year’s time and transport in Australia in five years’ time are reported as changes in the TOPS Index.

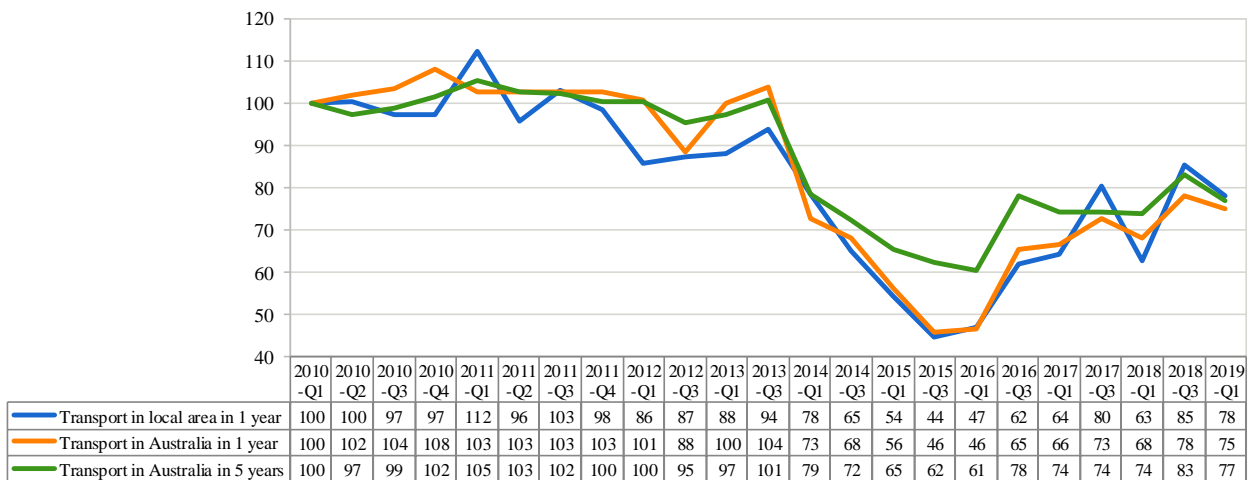
A TOPS Index value of more than 100 means that Australians’ confidence about transport getting better is stronger relative to March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2019 quarter as compared to the March 2018 quarter:

- Australians have become more confident about transport in their local area in one year’s time.
- Australians have become more confident about transport in Australia in one year’s time.
- Australians have gained confidence about transport in Australia in five years’ time.

Compared to the launch of TOPS in March 2010, Australians are less confident about transport in their local area in March 2019 (Confidence index: from 100 to 78), less confident about transport in Australia in the next year (Confidence index: from 100 to 75), and less confident about transport in Australia in five years time (Confidence index: from 100 to 77). There has been a very strong decline in confidence since September 2013; however, all three indices have significantly recovered compared to the year 2015.

ITLS TOPS Index of Transport Confidence

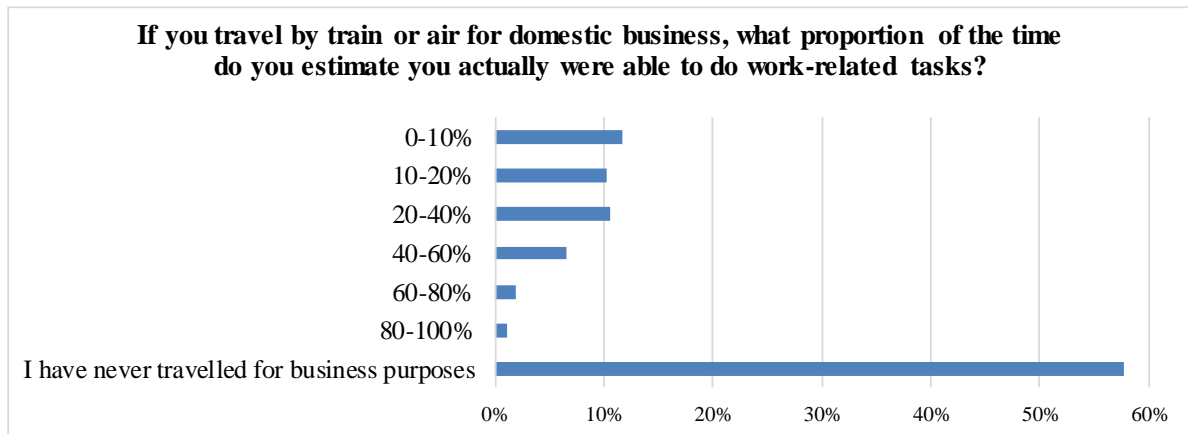


5. Supplementary questions on the proportion of travels for work-related purposes made by Australians domestically by train or air and means of transport they have used for the last month.

In the March 2019 quarter, two new questions were asked to understand public opinion on the amount of travels for business purposes they make when using train or air transport services. In addition, Australian residents were asked about transport services they have travelled by domestic train and air services over the last month.

If you travel by train or air for domestic business, what proportion of the time do you estimate you actually were able to do work-related tasks

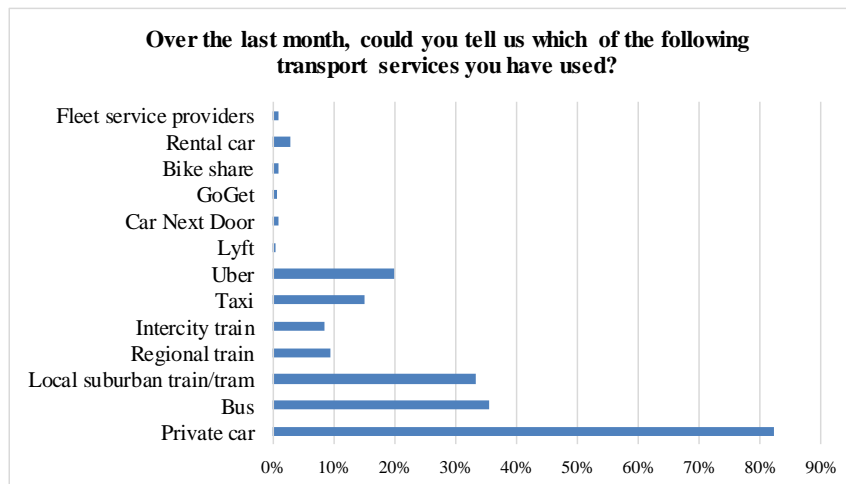
On average, approximately 33% of Australian respondents said that their amount of domestic train or air travel. Only less than 10% of Australian travellers revealed that their business trips account for more than 40% of time they take a train or flight. Meanwhile, 58% of Australian respondents said that they have never travelled for work-related purposes using train or air within Australia.



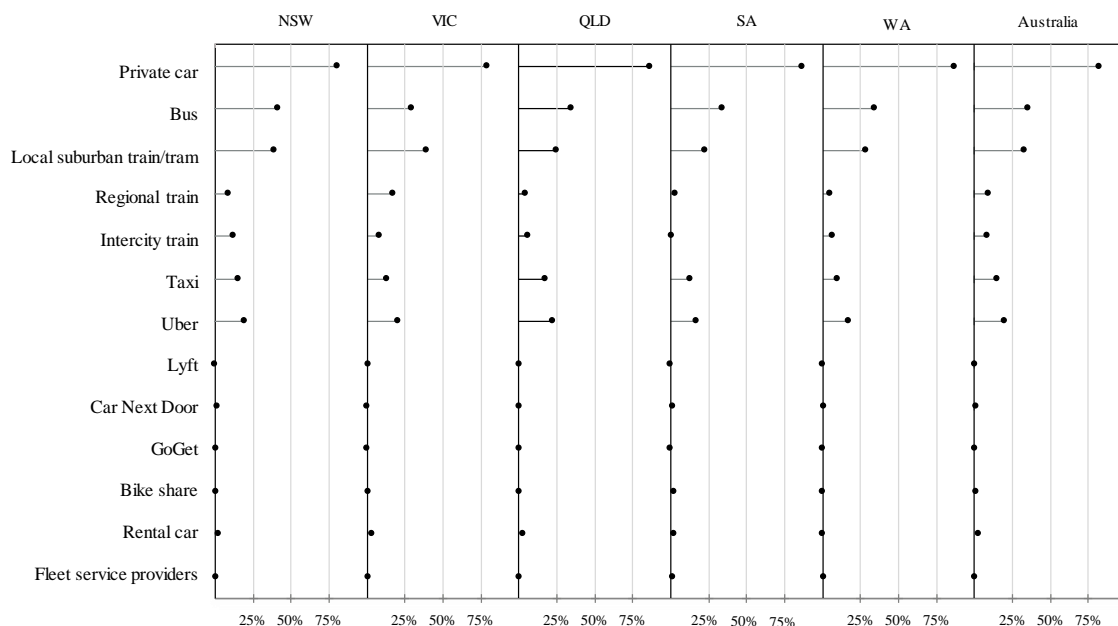
Over the last month, could you tell us which of the following transport services you have used?

When asked about means of transport used for the last month, 82% of Australians said private car, followed by bus (36%) and intracity train or tram (33%). Approximately 9% of Australian respondents used intercity and regional train when travelling. Ride share such as Uber and Lyft relatively exceeds taxi across all states. Each of car share including Car next door and GoGet, bike share, and fleet service accounts for only 1% of transport service use. The proportion of rental car is slightly higher with 3%.

- 45% of the car users travel by car all the time while the rest also travels by other transport modes such as bus, train, tram, and taxi/Uber.
- Bus and train are the second most popular alternative modes to car with around 30% of car users, but this varies substantially across states.
- Car users in Victoria prefer local train/tram over bus (31% vs. 21%) while those in Queensland prefer bus over train (30% vs. 21%), with NSW car users using these two modes to the same extent (around 28% each). In the other states (South Australia and Western Australia), bus is relatively preferable than local train or tram.
- Regional train use has a higher proportion in Victoria compared to that of the other states.



Transport service use over the last month by state



Timing of TOPS

The fieldwork for each quarter was conducted on the following dates:

- March 2010: 13 – 28 February 2010
- June 2010: 15 – 30 May 2010
- September 2010: 23 August – 5 September 2010
- December 2010: 5 – 17 November 2010
- March 2011: 9 – 27 February 2011
- June 2011: 13 – 30 May 2011
- September 2011: 11 – 25 August 2011
- December 2011: 4 – 22 November 2011
- March 2012: 10 – 26 February 2012
- September 2012: 10 – 27 August 2012
- March 2013: 23 March – 13 April
- September 2013: 10 – 26 August
- March 2014: 13 – 18 February 2014
- September 2014: 16 – 19 September 2014
- March 2015: 4 – 9 March 2015
- September 2015: 9 – 14 September 2015
- March 2016: 2 – 14 March 2016
- September 2016: 1 – 7 September 2016
- March 2017: 2 – 13 March 2017
- September 2017: 7 – 8 September 2017
- March 2018: 26 February – 6 March 2018
- September 2018: 30 August – 1 September 2018
- March 2019: 21 February – 5 March 2019

More information

Visit the TOPS website for quarterly reports, media coverage and to register to receive TOPS updates by email each quarter.

<http://sydney.edu.au/business/itls/tops>

The Institute of Transport and Logistics Studies in The University of Sydney Business School provides education and conducts research in transport, logistics and supply chain management.

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